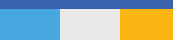




# ***roXtra***

## Product Highlights



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Version 10/2020



# QM Documentation with roXtra

**roXtra**

Efficient QM document management makes everyone's job within the company easier. roXtra handles previously time-consuming tasks: keeping metadata on documents and records up to date; documenting each new revision; reviewing, approving and distributing documents and information; and even archiving old versions.

With roXtra, you can make effective and secure QM document management a reality – today.



## **Complete QM documentation solution**

Manage all your company documents and related communication in roXtra and edit them using customary MS Office programs.



## **roXtra saves you time and money**

Clearly structuring your documents in roXtra not only makes your job easier, you also gain security and avoid unnecessary, risky errors.



## **roXtra provides certification security**

Through standard-compliant version control and archiving, roXtra guarantees seamless documentation. With functionalities that can be customized to your needs, roXtra makes managing documents fun again.

**Experience first-hand how roXtra can help you manage your QM documentation more efficiently.**



# Document Creation | roXtra

roXtra supports the entire document lifecycle, from creation to archiving. It also supports all file formats, document and record types.

The first step is to select the type of document you'd like to create. roXtra supports an

## > Unlimited range of document and record types

from QM process documentation to operating procedures and much more.

To give your documents a uniform look, you can store templates for each document type.

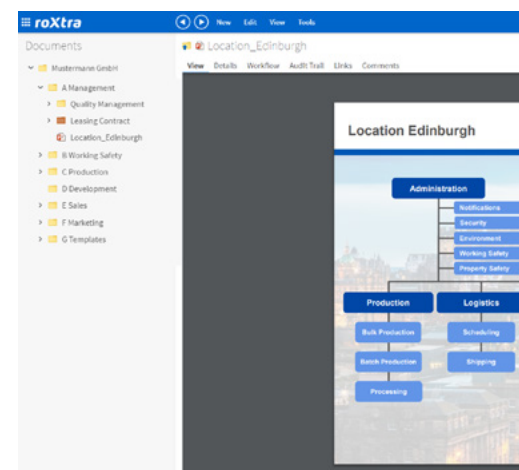
## > Uniform design through templates

- Word template for user manual sections
- Visio template for flowcharts
- 8D report
- any other type of template

## > Automatic document creation

Depending on their type, documents may contain various metadata fields for recording additional information.

Once a document is created, it's already in the system, but it hasn't yet been approved for viewing by users.



# Document Editing | roXtra

A documentation system should provide maximum support without limiting your design options. That's why roXtra lets you:

## > Edit documents with your customary software

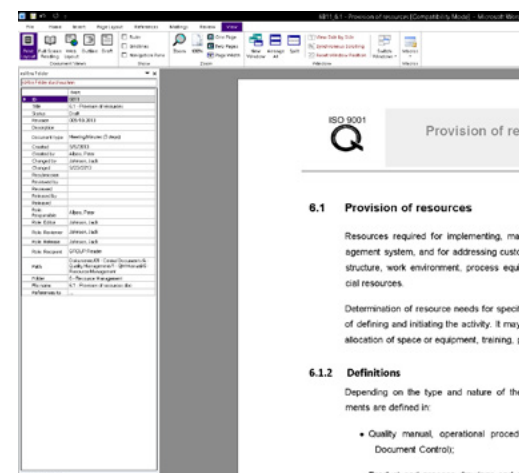
- MS Word
- MS Excel
- MS Visio
- MS PowerPoint
- any other program

Whenever you modify a previously approved document, you must naturally make sure that the revised version is only viewable once it is completely finished and has been reviewed and approved.

## > While an active document is being revised, readers will continue to see only the previous version

Editing takes place within a protected area of roXtra that only specially designated users can access.

This way, you don't have to worry about documents being circulated before they're approved.



# Workflow Management

**roXtra**

roXtra lets you create specific workflows for each document type. These workflows indicate the steps that each document must go through to be revised, such as editing, review and approval by the person responsible for each step.

The workflow management process also includes task and escalation management with e-mail integration.



**The workflow function automates the document editing and approval process, making life easier for quality managers**

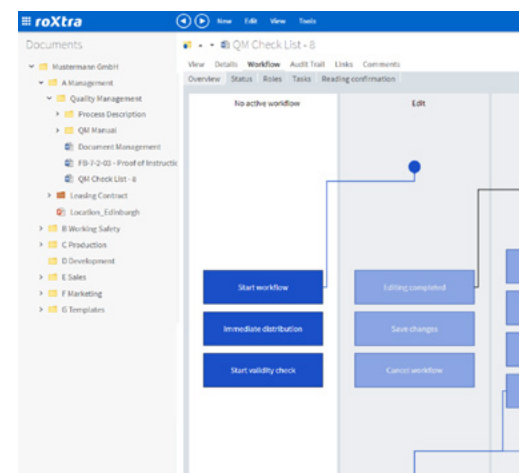
All responsible parties are notified by email of upcoming tasks (editing, review, approval, etc.).

Integrated escalation management ensures that no tasks are forgotten and all deadlines are met.



**All important procedures are documented in compliance with applicable standards**

Thus, roXtra provides security before an audit. All completed steps are logged and traceable at all times.



**Only once a document has been approved will readers be able to access it.**



# Distribution and Approval

**roXtra**

Once a document has been edited and approved, you can inform all affected users about the changes.



**roXtra notifies all relevant users automatically by e-mail**

Users can access the document by clicking on the link provided in the email. In addition to email notifications, the system also creates and displays tasks.



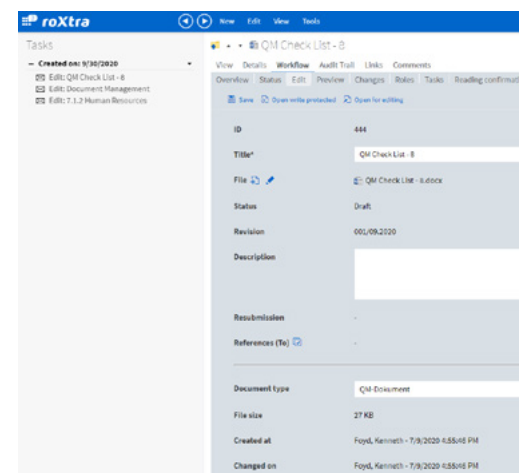
**roXtra documents all receipt confirmations**

The new version is delivered to those users who need it, thus completing the cycle.



**roXtra lets you approve documents securely through open links**

You also have the option of making certain content available in roXtra via open links. Of course, you can deactivate these links at any time.



And because roXtra is a web-based system, it's very easy to integrate outside partners and keep them up to date.



# Search & Find | roXtra

The purpose of good QM documentation is to provide your staff and outside partners with the information they need – reliably and on time.

Information in paper documents or files sent via email are often difficult to find in a rush. It depends on how well organized the document recipient is in storing and sorting the documents.

In roXtra, documents are



## Organized in a clear, hierarchical tree structure

This structure is customizable. roXtra lets you view documents by standard or regulation, location, department or process.

Access rights let you control which folders and documents each user can access.

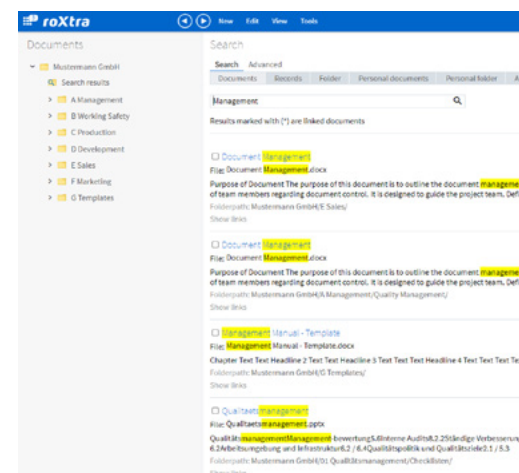
Other content remains hidden or unsearchable.

roXtra also lets you conduct a



## Full text search of the entire system

In a full text search, roXtra doesn't just search keywords and metadata but the entire text of every document.



With roXtra, the key word is „find“ not „search“!





# Version Control and Archiving

**roXtra**

roXtra helps you keep your documents up to date while maintaining access to previous versions of a document. This lets you see, for example, what version was current on a particular date.



**roXtra ensures that all users have the same and most up-to-date information**

The system guarantees that all users will always be able to access the most recently approved version of a document.



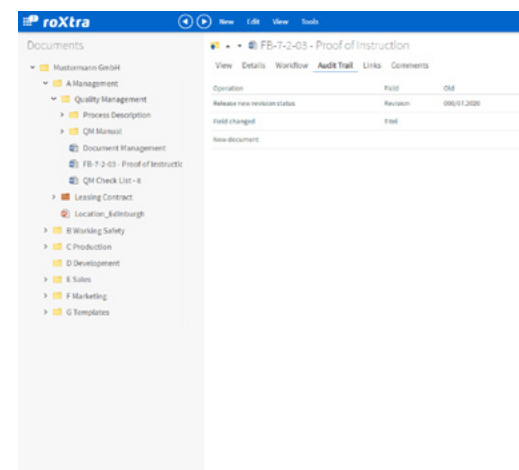
**roXtra automatically removes old versions from circulation**

However, users with corresponding access rights can still view the entire version history, including tracked changes.



**Permanent archiving of the entire version history**

All changes over the entire life of the document are securely archived in compliance with applicable standards.



**roXtra gives you gapless version control and lets you actively manage information by keeping a record of all changes in the system.**



# Communication and Teamwork

**roXtra**

Efficient communication is the foundation for dynamic working in roXtra. Forget about complicated messaging via e-mail. In roXtra you are able to establish well-organized and transparent communication.

Improve your teamwork, which is supported by the flexible workflow management in roXtra and the fast access, regardless of the location.



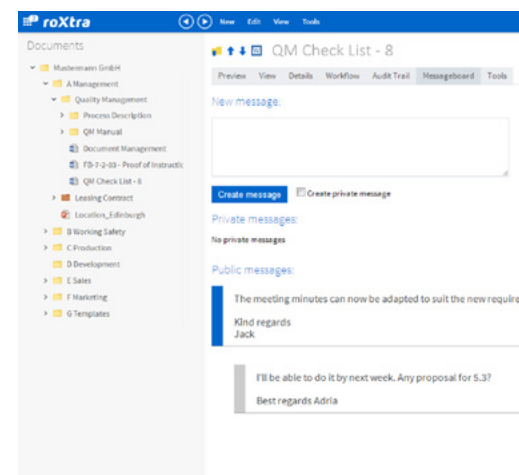
## Create private or public messages

You can send private or public messages in roXtra regarding any document so that you are able to talk about issues in a transparent, concise manner.



## Work networked in teams

Workflows take care of a smooth working with documents and folders with multiple users. The web-based log-in via browser enables the access to roXtra also from mobile devices, regardless of the location.



**With roXtra you can collaborate across departmental and company boundaries.**



# Flowchart-Designer | roXtra

Ever since the publication of the new ISO 9001:2015, the process-orientated approach has increasingly been the focus of QM and management. The description of key figures, responsibilities, inputs and outputs represents new requirements for many – which you can implement transparently and in an integrated manner using the *Flowchart-Designer*.

## > Design any flow charts, process landscapes, orgi-grams or mindmaps.

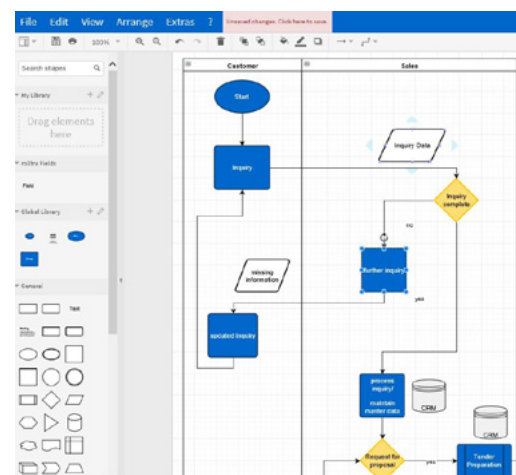
To present your processes transparently, you can choose from various styles, shapes and colors. For various basic formats you can access special templates.

## > Integrate documents and information from roXtra into your processes.

Save the associated forms and documents from your roXtra documentation directly in the individual process steps within your process landscape. You can also link to external content.

## > You can work independently of Visio and benefit from the workflow functionality in roXtra

Your employees can create processes directly in roXtra and run them through a check and approval workflow. No other local programs, e.g. MS Visio, are needed. Once processes have been created in roXtra, they benefit from all current functions in roXtra. This includes the automatically generated PDF view for read access.



**With roXtra you can unlock your potential in professional process management.**

# Contract Management

**roXtra**

The enhancement *roXtra Contracts* means a totally new basis for your management of contracts. Clear chains of responsibility ensure the security and integrity of your contractual documents.

## > You are able to react to expiry dates or notice periods in time.

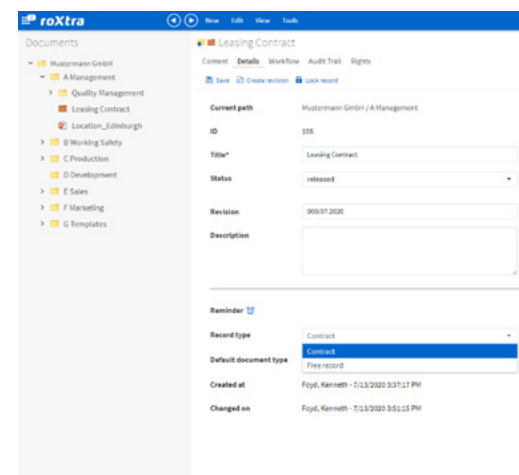
In roXtra multiple reminders connected with your contractual documents automatically remind you of terms and periods.

## > At a glance you get an topicbased overview which contracts are existing.

The webbased system allows a central filing of all contracts including all related attachments. Also, you can ensure that users only access the latest version of a contract.

## > roXtra shows you which costs arise out of each contract.

You can maintain all important metadata in roXtra e.g. the Contract Type, Contracting Party and Contract Number. Respective cash flows can also be maintained and continuously displayed.



*„How many savings could you realize annually, if you renegotiate contracts regularly or terminate contracts in time?“*

With roXtra you have easy access to current contractual relationships before contract negotiations.

# Mobile Access | roXtra

Become even more flexible in terms of your document management! With the roXtra app and Mobile-Connector you have mobile access to your roXtra system. Manage your documents, records, favorites and tasks in roXtra directly via your smartphone and tablet.

## > Wherever you are, you have the latest business data on hand

Make the most of the time on business trips, on the train or at a customer site. You can easily manage and confirm tasks with the roXtra app while on the go. With the integrated search and your favorites you have the fastest possible access to all important documents.

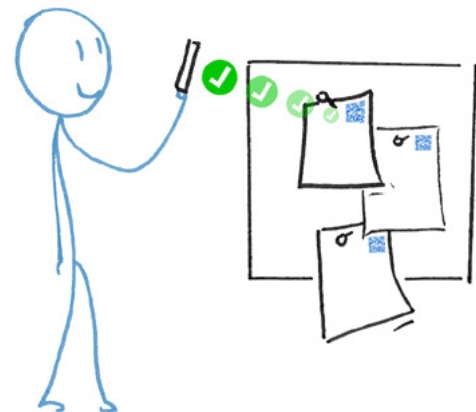
## > Easily check if paper documents are up to date with the roxValidator

The roxValidator is integrated into the roXtra app and enables a simple and quick validation check of printed roXtra documents by means of a QR scan.

## > Get your free trial of the roXtra app now!

Download the app in your [App Store](#) or [Play Store](#). With our free demo account you can get to know all the basic functions of the app.

With mobile access to roXtra you have your documents always at the right time in the right place.



## roXtra Document Server

### Configuration

- Customizable interface can be adapted to the CI (Corporate Identity) through Cascading Style Sheets (CSS)
- Supports all document types
- Data fields can be customized based on document type
- Customize input and output forms in HTML editor

### Document Management

- Manage documents in any file format
- Manage documents with associated files links or even without a physical file
- In addition to documents, manage other freely configurable data sets such as customer complaints, supplier addresses, etc.
- Interface with MS Office; access the system directly via Word, Excel, etc.

### Document Editing

- Block access to original document through Workflow Locking
- Interface with MS Office directly via Office Connection

### Workflow

- Support for the entire document lifecycle, from creation to archiving
- Function- and process-oriented documentation
- Clear assignment of rights and responsibilities at the document level (reader, user, reviewer, approver, etc.)
- Completely customizable approval and distribution workflow based on document type
- Complex workflows, including those with a combination of serial and parallel editing steps
- Automatic user notification by email and task lists
- Deadline tracking and escalation management

### Access to Documentation

- Access the system through any standard browser
- No need to install additional software on clients (exception: client add-on required for full MS Office connectivity, which allows direct access to the database via MS Office)
- Preview Server lets you display data on clients without MS Office



- Full access via intranet or optionally via internet
- Allows easy integration of geographically distributed locations and outside users such as customers or suppliers
- Reader can record comments on any file; supports continuous improvement processes
- FTP access to document server
- Assign documents to different views

## Archiving

- Audit trail lets you track important changes
- Archive old versions
- General access to old versions is automatically blocked, safely prevents improper use of outdated documents

## Microsoft Office Connectivity

- Share file attributes with MS Office documents (title, remarks, etc.)
- Office add-on for direct access to the document server from MS Office

## Analysis and Statistics

- Table- and graphic-based analysis of documents and processes
- Export data in different formats (XML, PDF, Excel, etc.)

## Document Extras

- Send notifications to select user groups
- Ensure continuous improvement process by sending comments directly to person(s) responsible for each document
- Manage references to other documents to guarantee integrity and data structure

## Search

- Search individual/multiple fields or the entire database
- Filter results depending on user rights
- With the roXtra Indexserver a full text search in the documents is possible

## User Management

- Manage users on multiple levels, including individual user and group levels
- Assign user rights down to the document level
- Optional connection to Active Directory, Azure AD or Okta



## Index Server

With the Index Server, you can expand the search index to include the full text of stored documents. Search the entire contents of a file, not just specific data fields.

- Expanded search options
- Full text indexing of numerous file formats, such as: MS Office, Adobe Acrobat, HTML, Text files
- Fast search algorithm through pre-indexing in the database

## Preview Server

The Preview Server creates one or more previews of numerous file formats.

- Convert MS Office files to HTML and/or PDF
- ideal for quick viewing in a browser (HTML) for printing (PDF)
- Files are converted fully automatically on the server
- Add stamps automatically to PDF files

## Language Packs

roXtra Language Packs make your system international.

- Different users can access the installation in different languages (simultaneous multilingualism)
- Numerous standard languages available; all other languages available through language templates
- Unicode support for international character sets (Chinese, Russian, etc.)

## Import Server

The optional Import Server monitors predefined paths and transfers any files stored there automatically to the document server.

- Freely configurable based on imported file format
- Share file attributes with MS Office documents
- Incorporate file converters for graphic files, etc.
- Create interfaces to external systems and databases





## App & Mobile-Connector

With an enabled Mobile-Connector you have access to your roXtra system from all mobile devices via the roXtra app.

- Access to documents incl. meta data
- Task management
- Search
- Access to favorites and personal folder
- Simple and quick validation check of printed roXtra documents with the integrated roxValidator

## Flowchart-Designer

Create, manage and link your processes, organigrams and flow charts directly in roXtra

- Design any flow charts, process landscapes, organigrams or mindmaps
- Benefit of the existing workflow management in roXtra
- Integration and linking of related documents, roXtra fields and objects into your processes
- Easily design complete networked process landscapes

## roXtra Contracts

Manage your contracts and contract files, terms and termination notice periods directly in roXtra

- Create and manage contract files and all associated documents
- Automatic multiple reminders about deadlines, terms and tasks
- Easy access to active contract relationships before contract negotiations
- Specific meta data for contractual documents
- Multiple reports (e.g. which costs you will incur in relation to a contract over the entire term)



## Technology

### Architecture

- Multitier concept from database server and web server
- Application based on .NET technology in combination with Windows Services, Ajax and XML
- Separation of data, application and display level
- Corporate design configuration via system settings (based on CSS)
- Metadata individually configurable
- Compatible with all common file formats (e.g. docx, xlsx, etc.)
- Rest API for automated data exchange
- Individual adaptation of system settings via XML configurations
- Multiple scalability as a shared system

### Security

- Password protected access (public key procedure)
- Optional encrypted communication via HTTPS
- Rights-based access
- Client access to the documents is only possible via the rights-based application logic

### System requirements for server

- From Windows Server 2012 R2
- Microsoft SQL Server

### System requirements for clients

- Web browser with enabled JavaScript (Microsoft Internet Explorer from version 11 or the latest version of Mozilla Firefox, Google Chrome or Microsoft Edge)
- Clients do not need MS Office to view documents, when using the preview server
- MS Office AddOn can be used from Office 2013 onwards

All information in this brochure without guarantee, changes and errors reserved.



## Experience roXtra live!

# roXtra

Experience roXtra and all its functionalities in an online presentation. We'll connect you to our system via the internet and show you how it works while answering all your questions on the phone in detail.



Give us a call at **+49 (0)7161 50570-0** oder contact us via e-mail at [service@roxtra.com](mailto:service@roxtra.com).

We look forward to speaking with you!



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