

# Document management

help.fractal.com/hc/change\_language/en-us

Fractal Demo

Settings Old Version RC

Save

Details

- General
- User Accounts
- Business Calendar
- Modules
- Financial
- Auxiliary Catalogs
- Document Management**
- Transactions Log
- Security
- API Connections
- Guest Portal
- Account

Warranties: Expired: 66 Valid: 7

Documentation: Expired: 175 Valid: 14

<input type="checkbox"/>	Name	Description	Group	Warranty	Valid	Validity Start	Validity End
<input type="checkbox"/>	Certificado Disposic...	Certificado de Dispo...	Certificaciones	No	No	--	--
<input type="checkbox"/>	Certificación de Seg...	Emitida por los Bom...	Documento Legal	Yes	No	2023-07-01	2023-09-13
<input type="checkbox"/>	Cámara de Comercio	Comercio Suscrito a...	Documento Legal	No	Yes	2017-03-31	2024-03-31
<input type="checkbox"/>	Compresor	Mantenimiento Gen...	Garantía de producto.	Yes	No	2022-02-02	2022-11-01
<input type="checkbox"/>	Certificado Camara ...	ELA WTC	STF	No	No	2022-09-01	2022-12-01
<input type="checkbox"/>	A/C compresor			Yes	No	--	--
<input type="checkbox"/>	Soat	Seguros Bolivar		No	No	2020-05-20	2021-02-20
<input type="checkbox"/>	Camara de Comercio	Comercio Suscrito a...	Documento Legal	No	No	2017-03-31	2017-10-31
<input type="checkbox"/>	Garantía de Cortinas...		Documento Legal	Yes	No	2017-08-03	2022-10-22
<input type="checkbox"/>	Garantía de Bancos...	Aires Acondicionados	Divisiones Técnicas	Yes	No	2021-11-11	2021-11-25

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In this submodule you will find a consolidated view of all the documents or warranties registered in other platform modules. You can also add, edit and link assets, Inhouse Personnel and third parties to each one of the documents or warranties registered in the platform's document management modules.

## How to add a warranty or document ?

To add a new warranty or document from the document management submodule, click on the add symbol at the lower right of the platform.

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Warranties: Expired 66 Valid 7

Documentation: Expired 175 Valid 14

<input type="checkbox"/>	Name	Description	Group	Warranty	Valid	Validity Start	Validity End
<input type="checkbox"/>	Certificado Disposic...	Certificado de Dispo...	Certificaciones	No	No	---	---
<input type="checkbox"/>	Certificación de Seg...	Emitida por los Bom...	Documento Legal	Yes	No	2023-07-01	2023-09-13
<input type="checkbox"/>	Cámara de Comercio	Comercio Suscrito a...	Documento Legal	No	Yes	2017-03-31	2024-03-31
<input type="checkbox"/>	Compresor	Mantenimiento Gen...	Garantía de producto.	Yes	No	2022-02-02	2022-11-01
<input type="checkbox"/>	Certificado Camara ...	ELA WTC	STF	No	No	2022-09-01	2022-12-01
<input type="checkbox"/>	A/C compresor			Yes	No	---	---
<input type="checkbox"/>	Soat	Seguros Bolivar		No	No	2020-05-20	2021-02-20
<input type="checkbox"/>	Camara de Comercio	Comercio Suscrito a...	Documento Legal	No	No	2017-03-31	2017-10-31
<input type="checkbox"/>	Garantía de Cortinas...		Documento Legal	Yes	No	2017-08-03	2022-10-22
<input type="checkbox"/>	Garantía de Reparac...	Aires Acondicionados	Revisiones Técnicas	Yes	No	2021-11-11	2024-03-31

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The system will open a new window where you can add the general information corresponding to the document you want to add.

← New Document Management Save

GENERAL ATTACHMENTS ASSETS INHOUSE PERSONNEL THIRD PARTIES

**Name**  Description

Name no puede estar en blanco

Advanced:

Group  Version

Validity Start  Validity End

ISO Code  Author

Warranty?

The information to fill in is as follows:

- **Name:** Name given to the document or warranty that you want to register.

- **Description:** Description of the document or warranty that is referenced.
- **Group:** List of groups that the document or warranty belongs to.
- **Version:** Version number of the document or warranty in question.
- **Dates:** Start and end dates corresponding to the validity of the document or warranty in question.
- **ISO Code:** ISO code of the document or warranty.
- **Author:** Author of the document or warranty.
- **Warranty:** When activating this field, the system will recognize the document as a warranty. Otherwise, the system will consider it a document.

Once all the information has been filled in, click on save.

← Edit Document Management Save

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GENERAL      ATTACHMENTS      ASSETS      INHOUSE PERSONNEL      THIRD PARTIES

---

Name:       Description:

Advanced:

Group:       Version:

Validity Start:       Validity End:

ISO Code:       Author:

Warranty ?

Once the document or warranty has been saved, it should be linked to the corresponding asset, third party or Inhouse Personnel (attachments can also be added). To do this, click on the corresponding tab and then click on the add symbol at the lower right of the window.

GENERAL

ATTACHMENTS

ASSETS

INHOUSE PERSONNEL

THIRD PARTIES



No data to show with these parameters

Showing 0 of 0



The system will open a new window with a list of available assets, inhouse personnel or third parties to link to the document. Then just select and link the document and click on save.

GENERAL

ATTACHMENTS

ASSETS



No data to show with these parameters

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- Aaraul
- AARONsdfsd COREMAR
- Abrahan Wilmer Mackay Batallas
- Adam Solano Jimenez
- Adam Solano Jimenez
- Administrador local costa wtw
- Administrador local sierra wtw
- ADOLFO JESUS MORALES CORTINA
- ADOLFO VELASQUEZ ALZAMORA

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GENERAL

ATTACHMENTS

ASSETS

INHOUSE PERSONNEL

THIRD PARTIES

<input type="checkbox"/>	Description	Assets Type
<input type="checkbox"/>	Cortinas de Aire Soler & Palau	Equipment
<input type="checkbox"/>	Cama hospitalaria { 01625 } Hill Rom	Equipment
<input type="checkbox"/>	Alimentador De Bagazo #2 { GP30 }	Equipment

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## How to edit a warranty or document ?

To edit a warranty or document, select it and the system will show the options to edit or delete.

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Warranties		Documentation :	
Expired	Valid	Expired	Valid
66	7	175	14

< (1) Selected

<input type="checkbox"/>	Name	Description	Group	Warranty	Valid	Validity Start	Validity End
<input type="checkbox"/>	Responsabilidad civi...	Seguro extracontrac...	Seguros a Terceros	Yes	No	2022-01-20	2023-02-26
<input checked="" type="checkbox"/>	Soat	Seguros Bolivar	Seguros	Yes	No	2012-01-13	2022-02-12
<input type="checkbox"/>	Todo Riesgo	Seguros Bolivar	Seguros	No	No	2021-10-24	2022-10-23
<input type="checkbox"/>	CONTRATO MONIT...		Garantía de producto.	Yes	No	2017-03-01	2018-03-01
<input type="checkbox"/>	Garantía por cambio...		Garantía de producto.	Yes	No	2017-02-02	2018-02-04
<input type="checkbox"/>	Certificado Disposic...	Certificado de Dispo...	Certificaciones	No	No	--	--
<input type="checkbox"/>	Certificación de Seg...	Emitida por los Bom...	Documento Legal	Yes	No	2023-07-01	2023-09-13
<input type="checkbox"/>	Cámara de Comercio	Comercio Suscrito a...	Documento Legal	No	Yes	2017-03-31	2024-03-31
<input type="checkbox"/>	Compresor	Mantenimiento Gen...	Garantía de producto.	Yes	No	2022-02-02	2022-11-01

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If you click on the edit option, the system will open a new window where you can make all the necessary changes. Then remember to click on save.

← Edit Document Management Save

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GENERAL ATTACHMENTS **ASSETS** INHOUSE PERSONNEL THIRD PARTIES

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<input type="checkbox"/>	Description	Assets Type
<input type="checkbox"/>	🕒 Cortinas de Aire Soler & Palau	Equipment
<input type="checkbox"/>	🕒 Cama hospitalaria { 01625 } Hill Rom	Equipment
<input type="checkbox"/>	🕒 Alimentador De Bagazo #2 { GP30 }	Equipment

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What types of files can I upload to Fractal One?