

DMS



UW'S DOCUMENT MANAGEMENT SYSTEM (DMS) SERVICE, POWERED BY DOCFINITY, ENABLES COMPLIANCE, SECURITY, AND LONGEVITY OF UW BUSINESS RECORDS WHILE OFFERING INCREASED EFFICIENCY AND EFFICACY TO YOUR DEPARTMENT.

DMS is available 24/7. It is available to University faculty and staff within academic, administrative, research, and business units at no cost. In addition, it supports a University-wide initiative to go paperless while increasing administrative productivity.

WHY USE IT?

Use DMS to store, discover, view, share, and manage electronic records throughout their lifecycle

Key capabilities:

- **Upload:** offers a "Quick" (simple) upload function that supports single-item and batch-upload capabilities
- **Index:** associate metadata to records and change field values using the "Simple Index" feature
- **Search:** designed to search on any identified metadata that has been configured
- **View:** view documents in both native format and PDF

The DMS repository currently holds more than 2 million documents for departments across UW.

ADDITIONAL BENEFITS

DMS provides users with:

- A secure cloud application with access using your UW NetID and Two-factor authentication (2FA)
- Consistent user interface and approach to handling all records
- Flexibility with configuration
- Records retention and disposition functionality

GET STARTED

For more information, refer to the UW IT Connect page: [Document Management System \(DMS\)](#).

MORE THAN JUST A REPOSITORY

The DMS Service (DocFinity) supports

- compliance with **Records Management** policies
- response to public records requests

Additionally, users will be automatically notified when documents need to be purged per state and federal laws.

DMS currently supports over 100 record retention schedules.

USE CASES

Before you get started, we recommend considering some use cases that have been proven successful:

- **Manage Electronic Records:** Store, retrieve, and view electronic content securely. (E.g., personnel records, student records, financial records)
- **Simplify Records Management Processes:** Search, identify, and hold records responsive to public records requests, litigation, and audits. Set document retention periods to automatically comply with UW Records Management policies.
- **Store Scanned Documents:** Digitize and store documents with high-volume scanning capabilities.
- **Retain Electronically Signed Documents:** Offers an optional integration with our eSignatures service (powered by DocuSign).