



## **Excitech DOCS**

### **Frequently Asked Questions**

#### **Can we use our own workflows?**

Yes. M-Files, the system which Excitech DOCS is built on top of, has a graphical workflow editor that makes it easy to create and manage your own workflows.

#### **Can we use our own naming conventions?**

Yes, all naming conventions are editable to suit your company's needs. We do however provide BS 1192 naming as standard out of the box.

#### **Can we save documents from any applications other than Revit or AutoCAD?**

Yes, you can store any document inside Excitech DOCS, including Microsoft Word, Excel, PowerPoint, InDesign, MicroStation, JPEG and many others.

#### **Is each document version stored as a separate file? If so, won't this fill up my server storage space?**

M-Files uses a binary delta algorithm to process old versions of document files. This reduces the disk space consumption of old file versions considerably.

#### **Can we share a document link externally?**

Yes, web access enabled links can be made available for external access.

#### **Do my clients need an M-Files log on to access documents?**

Yes, they will need log on credentials to access any documents you have shared with them.

**Can we create our own transmittal sheet?**

Not currently. Our standard transmittal sheet is automatically generated with essential information included, which can be edited in Excel.

**Can I transfer Outlook contacts into Excitech DOCS and vice versa?**

As a one-off exercise you can transfer Outlook contacts into Excitech DOCS. Thereafter you would manage contacts in Excitech DOCS.

**How does Excitech DOCS manage the Revit model?**

Excitech DOCS provides the ability to create a model from a template and then maintain snapshots at milestones that are decided by the project lead. Excitech DOCS manages the output from that Revit Model by printing Revit sheets which can be put through a workflow and approved.

**Can we manage certain projects in Excitech DOCS and others in Windows Explorer folders?**

We suggest you use both systems in parallel and put new projects in Excitech DOCS. However you are also able to migrate old projects and use only Excitech DOCS.