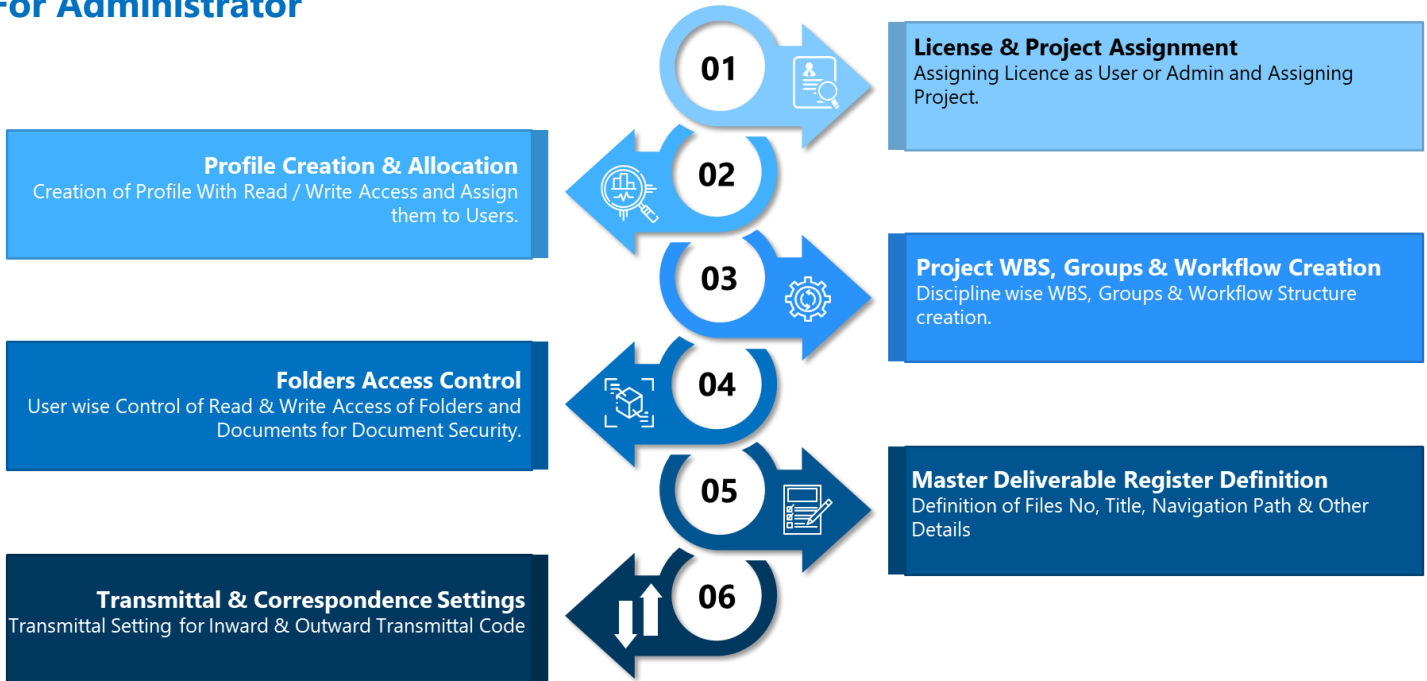# Document Management System with Hold Management

PRODOCS is a Document Management software (DMS) used to manage, track, and store the electronic documents of paper-based information captured through the mediums like document scanner, Mailboxes, Websites, Office tools, Integration tools, etc.

This Document Management software (DMS) controls and organizes documents throughout an organization. It incorporates document and content capture, workflow, document repositories, Output systems, and information retrieval systems. It also contains the processes used to track, store, and control the documents.
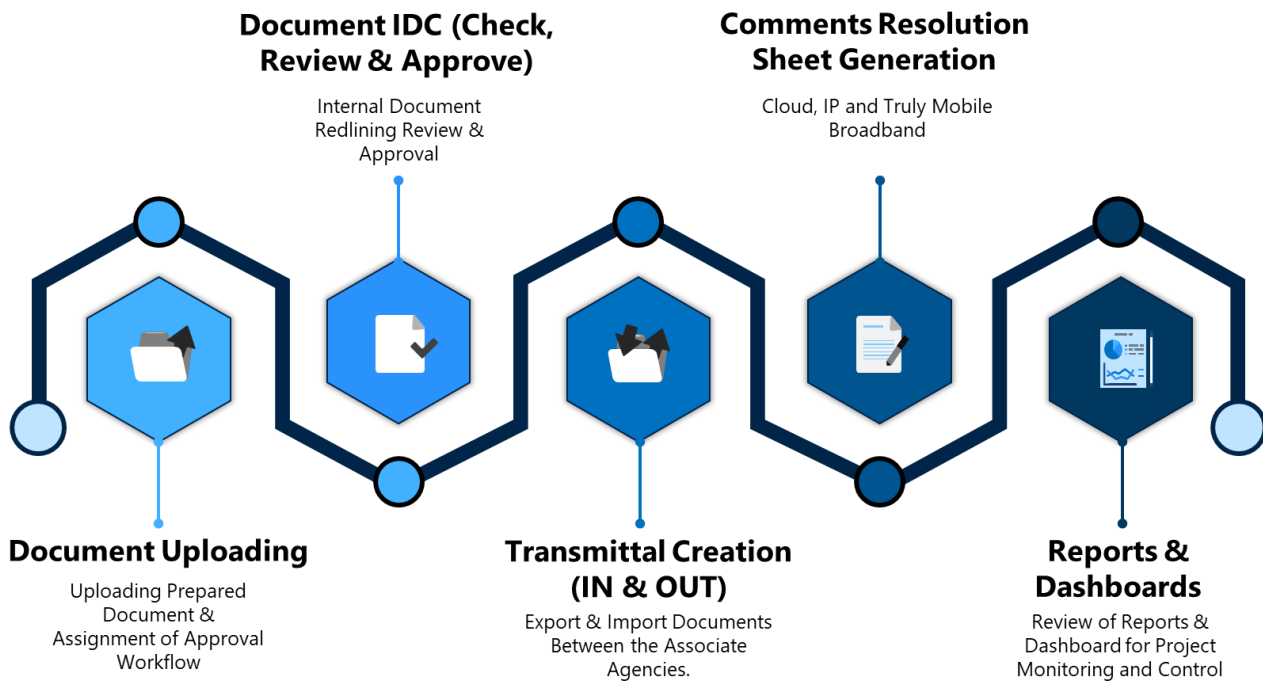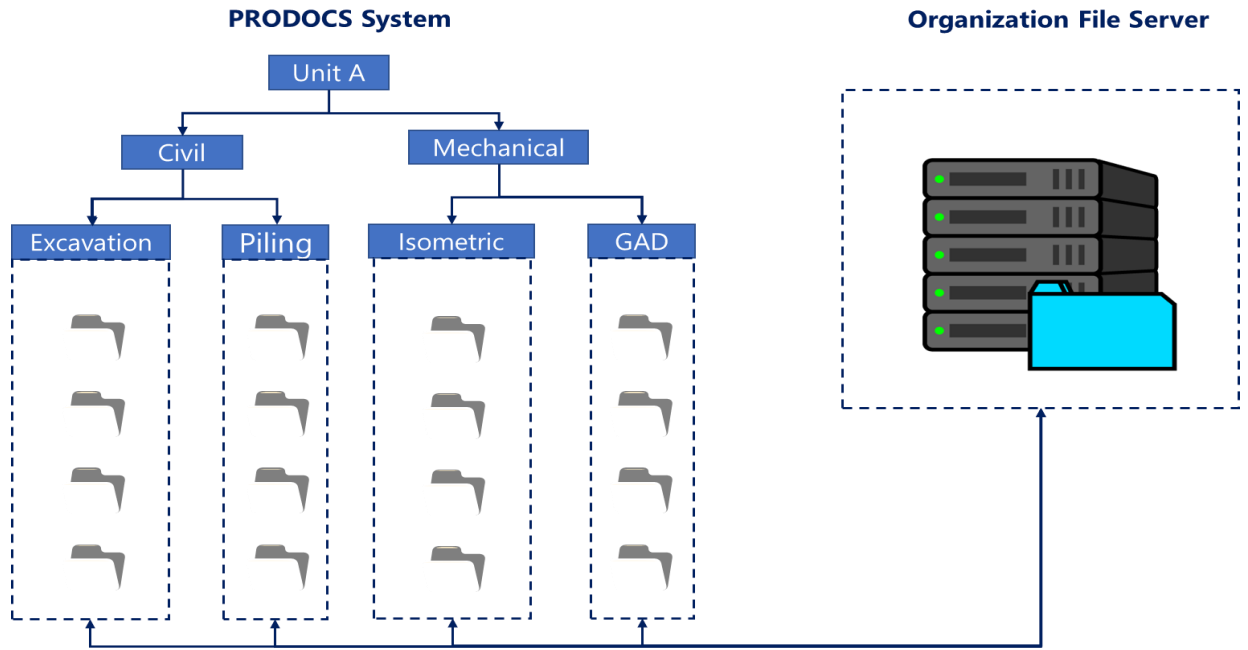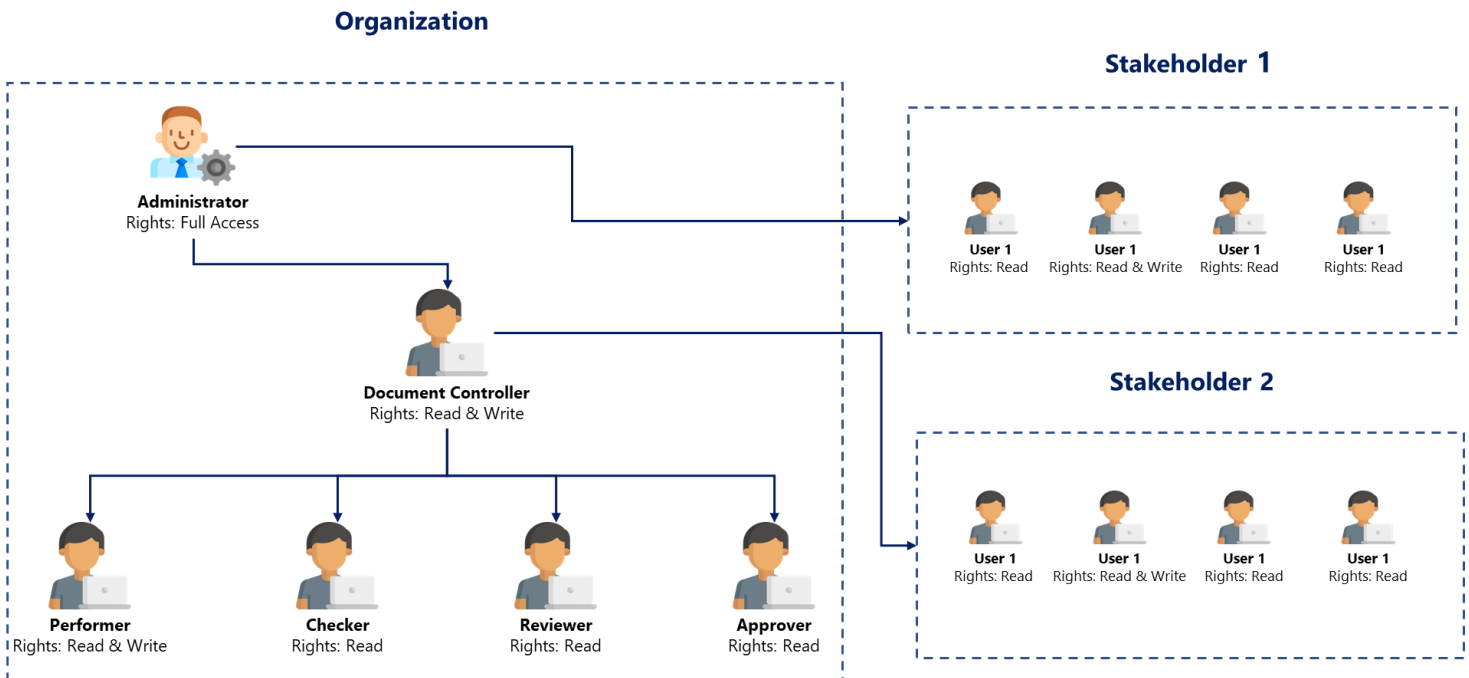
PRODOCS Workflows

For Administrator

01

License & Project Assignment
Assigning Licence as User or Admin and Assigning Project.

02

Profile Creation & Allocation
Creation of Profile With Read / Write Access and Assign them to Users.

03

Project WBS, Groups & Workflow Creation
Discipline wise WBS, Groups & Workflow Structure creation.

04

Folders Access Control
User wise Control of Read & Write Access of Folders and Documents for Document Security.

05

Master Deliverable Register Definition
Definition of Files No, Title, Navigation Path & Other Details

06

Transmittal & Correspondence Settings
Transmittal Setting for Inward & Outward Transmittal Code

For User

Document IDC (Check, Review & Approve)

Internal Document Redlining Review & Approval

Comments Resolution Sheet Generation

Cloud, IP and Truly Mobile Broadband

Document Uploading

Uploading Prepared Document & Assignment of Approval Workflow

Transmittal Creation (IN & OUT)

Export & Import Documents Between the Associate Agencies.

Reports & Dashboards

Review of Reports & Dashboard for Project Monitoring and Control

Project WBS Master & Folder Repository

PRODOCS System

Organization File Server

```
Unit A
├── Civil
│   ├── Excavation
│   └── Piling
└── Mechanical
    ├── Isometric
    └── GAD
```

Profile & Folder Access Control

Organization

Administrator
Rights: Full Access

Document Controller
Rights: Read & Write

Performer
Rights: Read & Write

Checker
Rights: Read

Reviewer
Rights: Read

Approver
Rights: Read

Stakeholder 1

User 1
Rights: Read

User 1
Rights: Read & Write

User 1
Rights: Read

User 1
Rights: Read

Stakeholder 2

User 1
Rights: Read

User 1
Rights: Read & Write

User 1
Rights: Read

User 1
Rights: Read

PRODOCS – PROHOLD is a system for Document Lifecycle Management, Document Indexing, Tracking, Processing, Workflow Automation, Version Control & Archiving, User Dashboard, Document Interface, and Security.
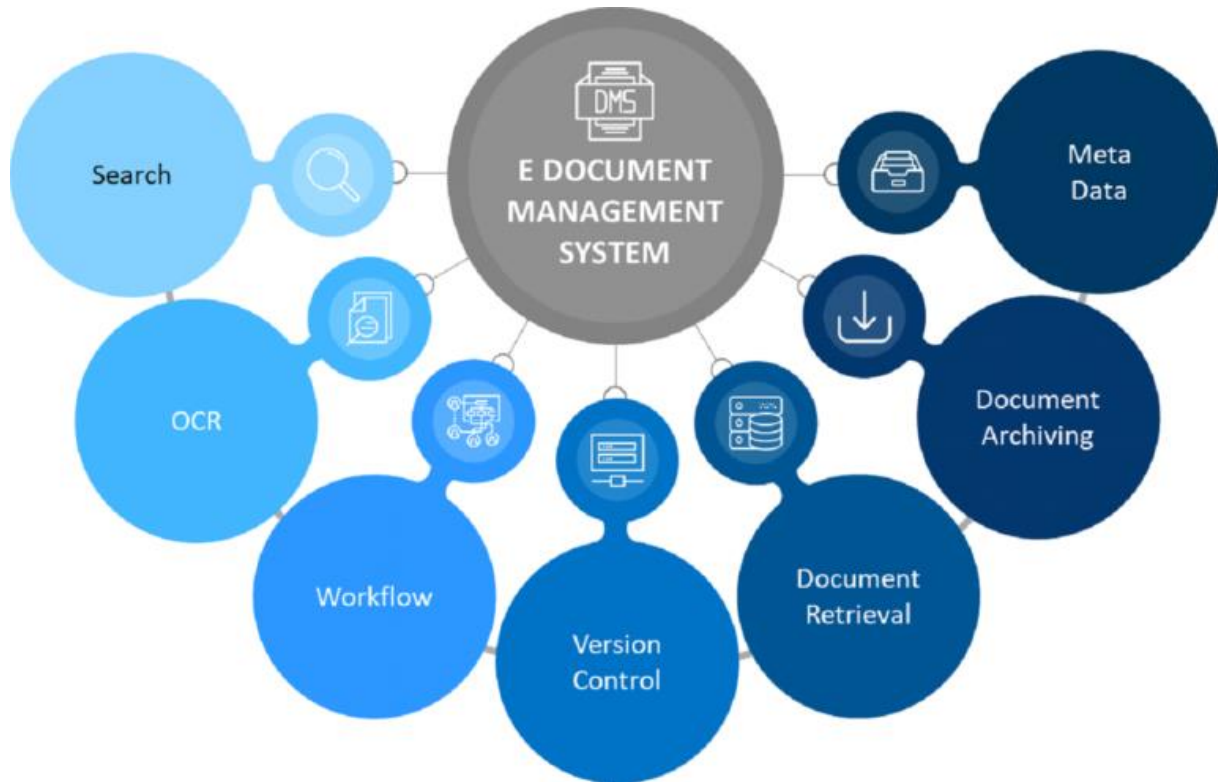
Document Input

When it comes to document input, most of the businesses combine paper and digital files. This Document Management System allows inputting files through the following sources:

Document Indexing

Document indexing and metadata is the process of associating or tagging documents with different "search" terms. Indexing is a path to the documents. That path is based upon your business processes and your staff.

PRODOCS includes following indexing features:

- Indexing of all documents
- Custom Automatic Document Numbering
- Content recognition and indexing
- Indexing Meta Data
- Indexing all revisions

- OCR in different languages (Vienna Advantage DMS currently covers 27 languages)
- Supports innumerable formats
- Extendable meta data fields

Document Search

PRODOCS includes the following search features:

- Safe and Powerful search
- Document content and meta data search
- Advanced search on all document attributes
- Scalable Document Search Engine
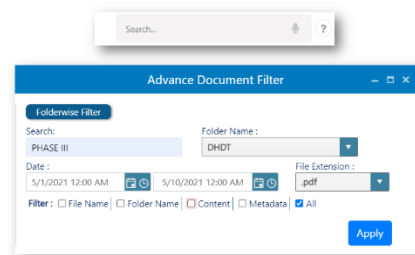
Search for Context, File Name, Folder Name, Meta Data within / across the folder. Search by File Types and using date range. OCR Language support

Document Processing

Document Processing involves the conversion of typed and handwritten text on paper-based & electronic documents (scanned image of a document) into electronic information utilizing one of, or a combination of, Intelligent Character Recognition (ICR), Optical Character Recognition (OCR) and experienced Data Entry Clerks. PRODOCS provides the following document processing features:

- Create Documents using Templates
- Link Document to records in System
- Forward, Move, Share Documents
- Email Documents
- Revise Documents

- Inbuilt Document Editors for various file types
- Check-In and Check-out documents

Workflow Automation

A good document management system should have inbuilt an enterprise level Business Process Management and Workflow Automation that automatically routes the documents to their destination. The workflow automation in PRODOCS provides:

- Rule based processing on incoming documents
- Setup individual rules and document actions
- Automatic and Manual workflow
- Document Routing

- Business Process Modelling with Customized Windows, Reports
- Configure multi-level approvals
- Automatic creation of records based on documents
- Update records based on documents

Version Control & Archiving
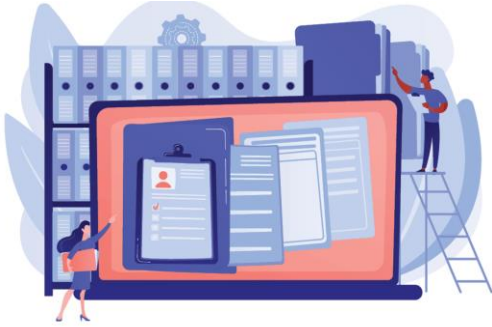
Every business has the need to maintain more than one version of the same document. also, they need to maintain an archive of all the documents in the enterprise. For that reason, PRODOCS Document Management System provides for versioning and archiving of documents.

User Dashboard & Reports

A DMS user interface should be simple and easy to navigate. Not everyone is technologically inclined, so the simpler the software, the better. PRODOCS main dashboard includes:

- Workflow Inbox
- Document inbox
- Inbuilt Calendar, Email, SMS
- Alerts and Notifications
- Reporting Dashboard
- Follow-ups and Chat

All or Individual Project Dashboard, Separate Visuals and Reports for Progresses about documents uploads, Approvals, Holds, Work Group Scopes etc.
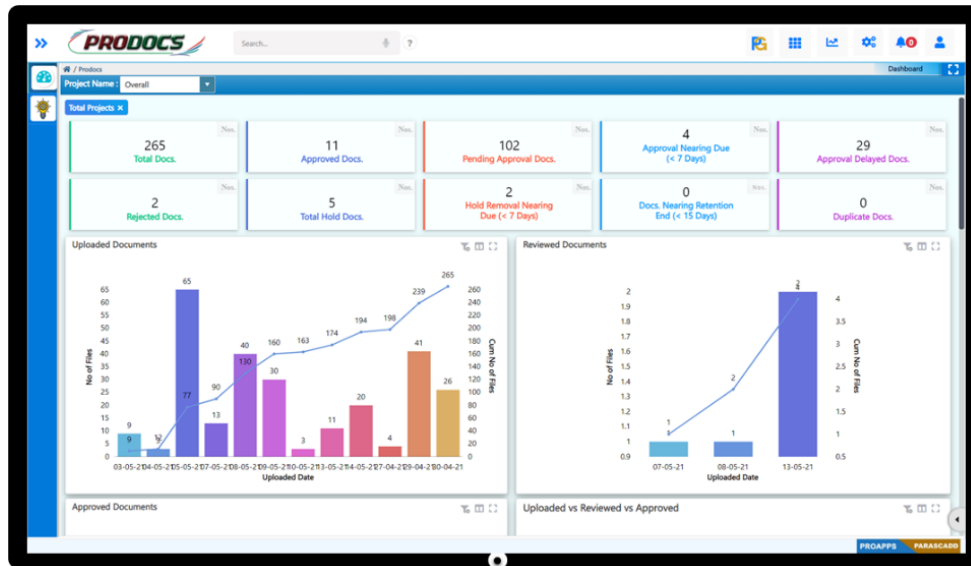
Document Security

Security is one of the most critical aspects of a document management system. PRODOCS provides a high level of document encryption and role-based access, as well as:

- Audit Trail
- User and Roles
- Advanced Access rights
- Encrypted Documents on file system

- Indexing all revisions
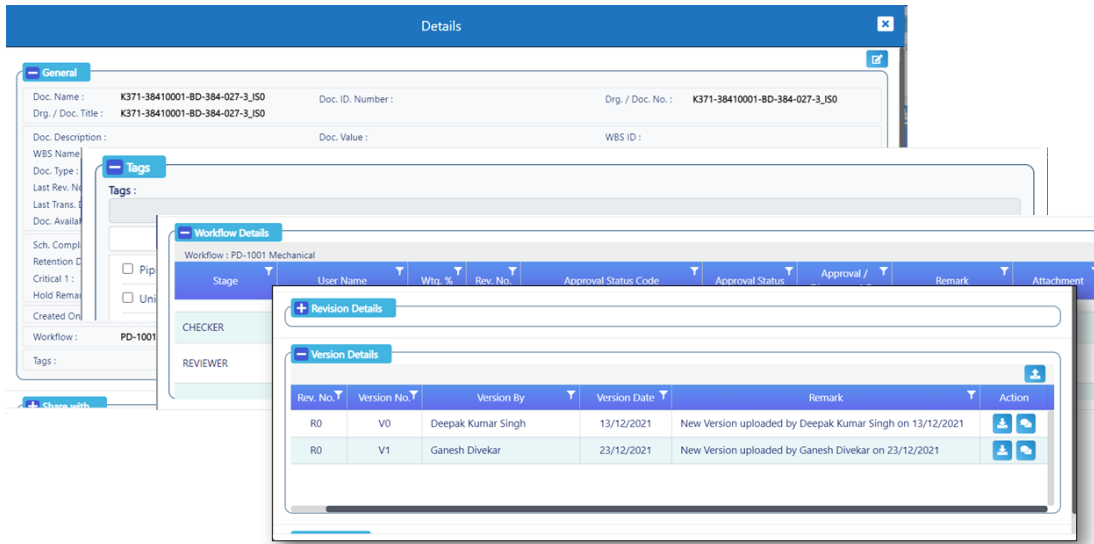- Supports SSL
- Modify Ownership

Define Projects, Folders, Files and Settings

Create the Project Description, Folder Structure & upload the files, Settings: Columns, Notifications & Misc.
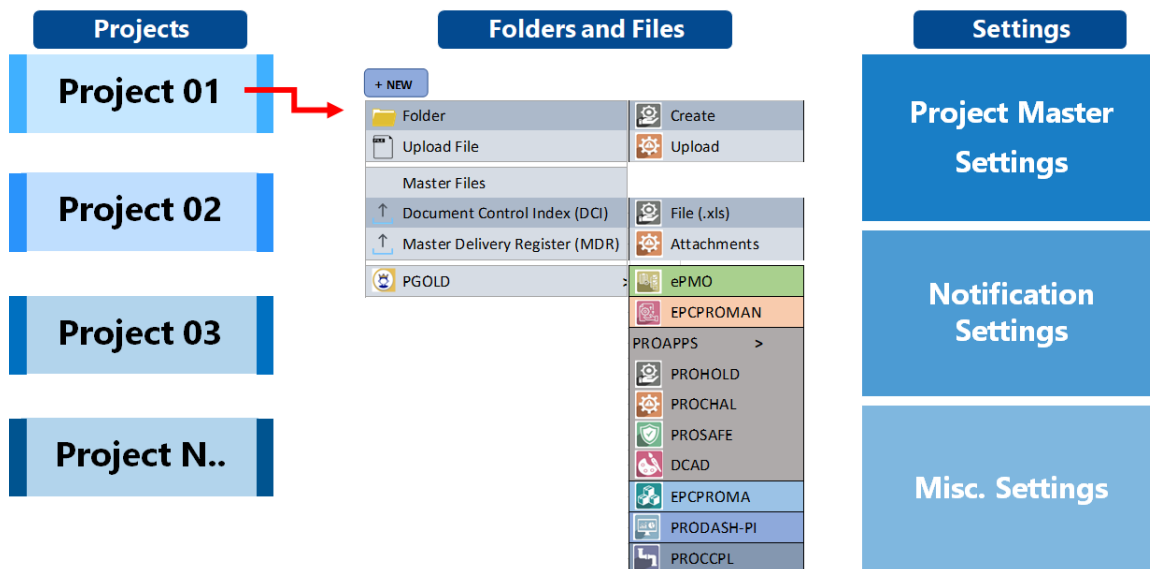
File Detailing with Meta Data, Versions

File Discipline, Unit, Originator, Revision, Document No., Title, Schedule Completion Date, Critical, Hold / Un-hold, Category, Tags etc.

File Editing and Locking for Multi Editing

File Check-In / Check-Out, Prevention to edit Meta data, addition of new revisions, Adding or editing the red lining comments until the file is unlocked / check-out
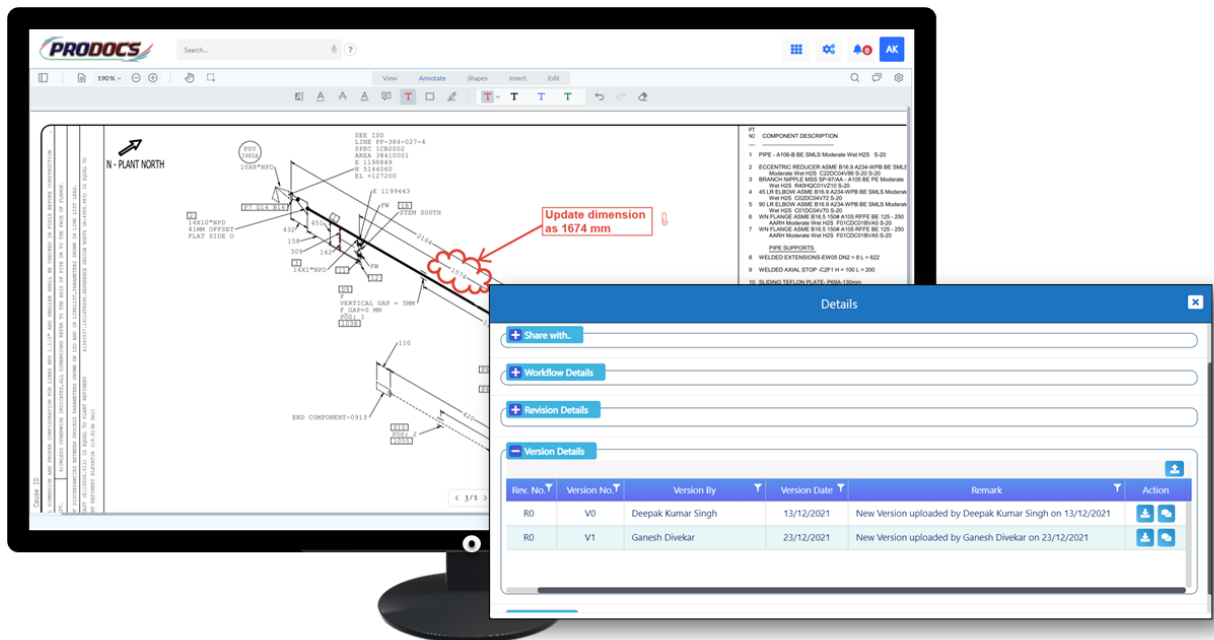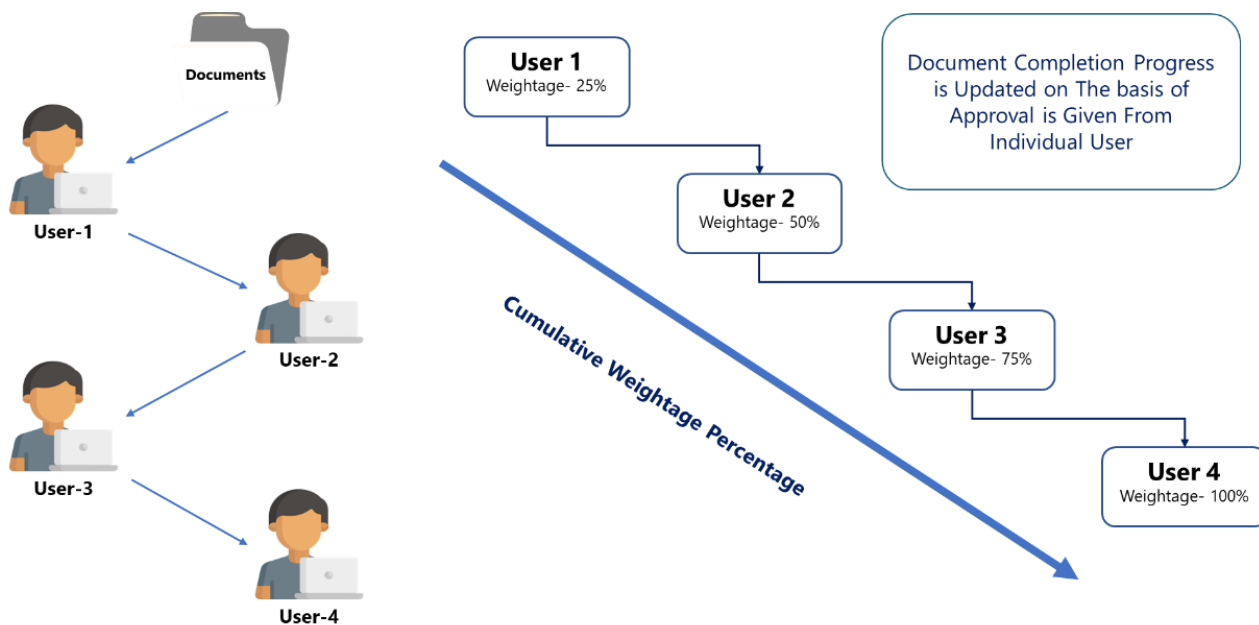

User Management, Workflow and Approvals

Create User, Assignment to the Projects, Groups and Workflows, Access Control

User Database and Workflow Approval Groups

1-3-1

1-1-1

1-1-2
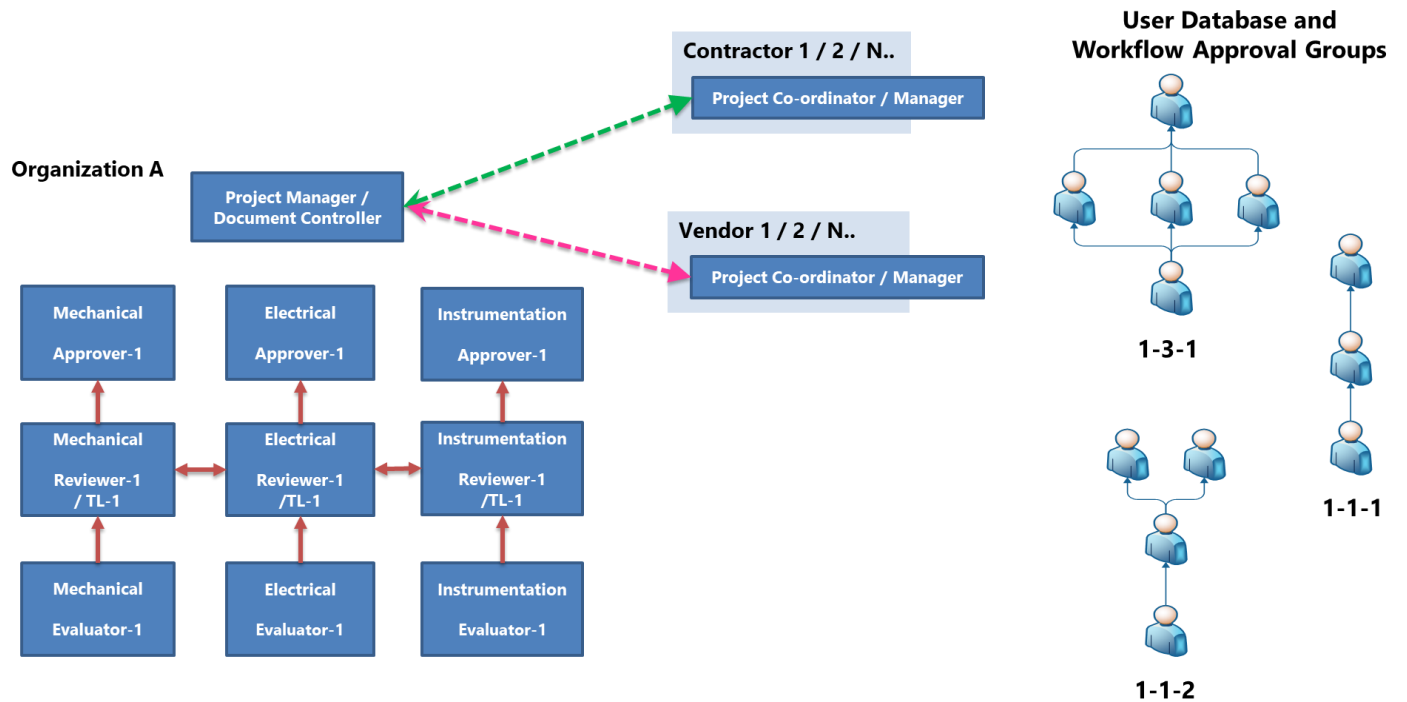
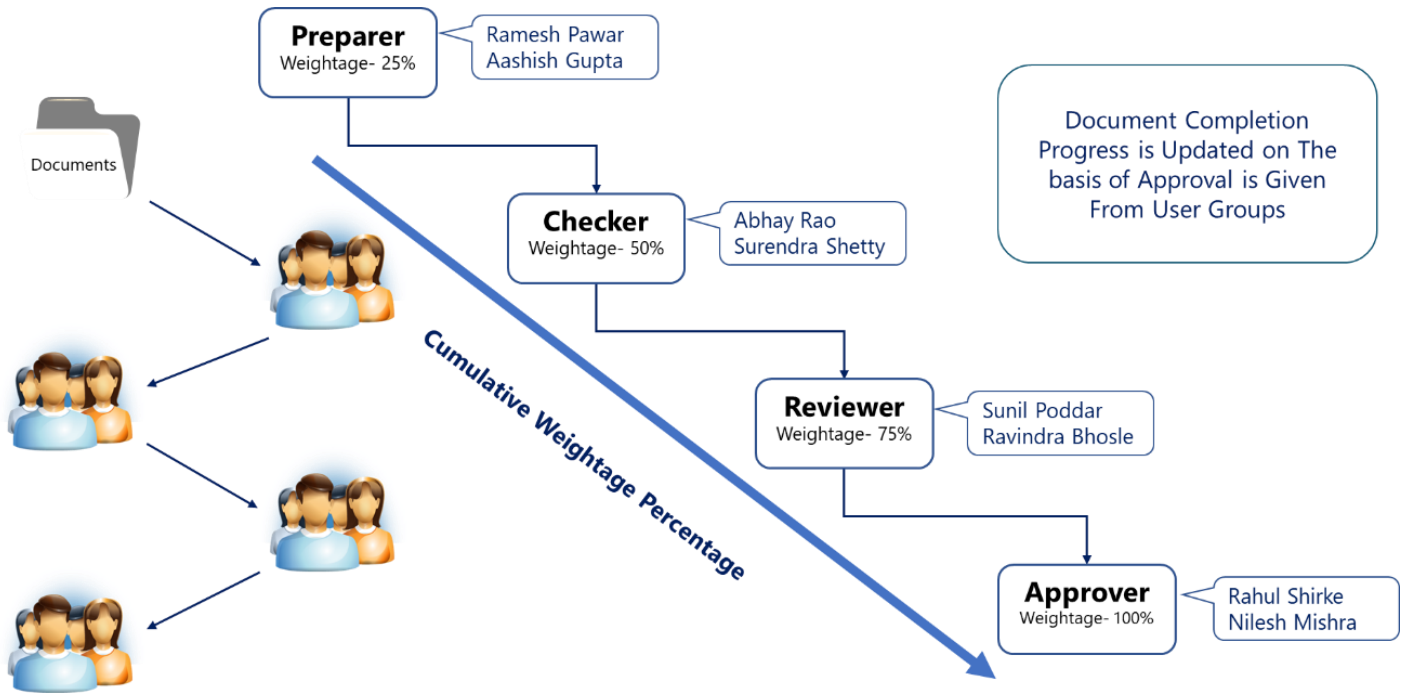# File Workflow and Approvals

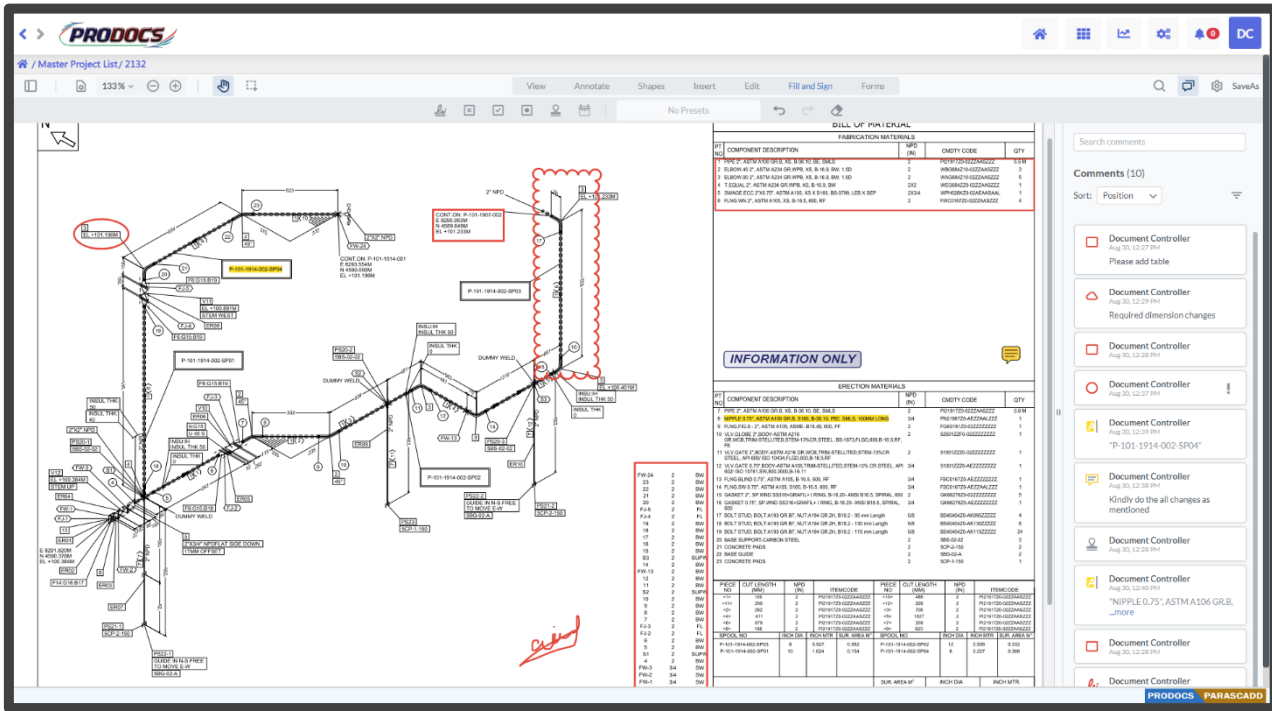Workflow Creation (Parallel and Serial), Files assignment to the Workflow, Approval / Rejection processes with remarks

For Individual

User 1
Weightage- 25%

User 2
Weightage- 50%

User 3
Weightage- 75%

User 4
Weightage- 100%

Document Completion Progress is Updated on The basis of Approval is Given From Individual User

Cumulative Weightage Percentage

For Group

Redlining & Commenting

Redlining & Commenting

- Highlighting Corrections & Changes in Drawings & Documents using tools like Highlight, Underline, and Strikeout.
- Stamping Final Comments of Approved, Disapproved & More.
- E Signature Create & Upload.

Response From User

- Reply to given comments by users after resolving issues or changes.
- Save or download responded drawing and document.

CRS Report

- Generation of Comments resolution sheet based on responses received from users.
- Detailed Comments resolution sheet report export.

Text Annotations

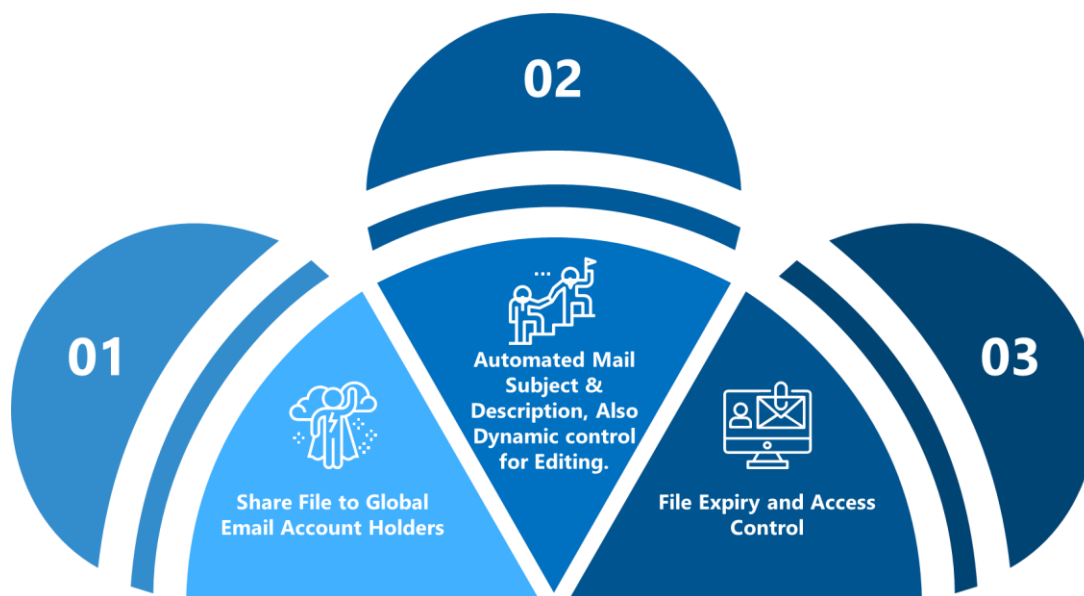### Following Features are Available for Text Annotations:

- **Highlight**
- **Underline**
- **Strikeout**
- **Squiggly**
- **Note**
- **Free Text**
- **Free Hand Draw**
- **Free Hand Highlight**

Transmittal Management

Share files to individuals or Groups or Public with / without expiration date. Send Reminders. Create Transmittals-In and Out.
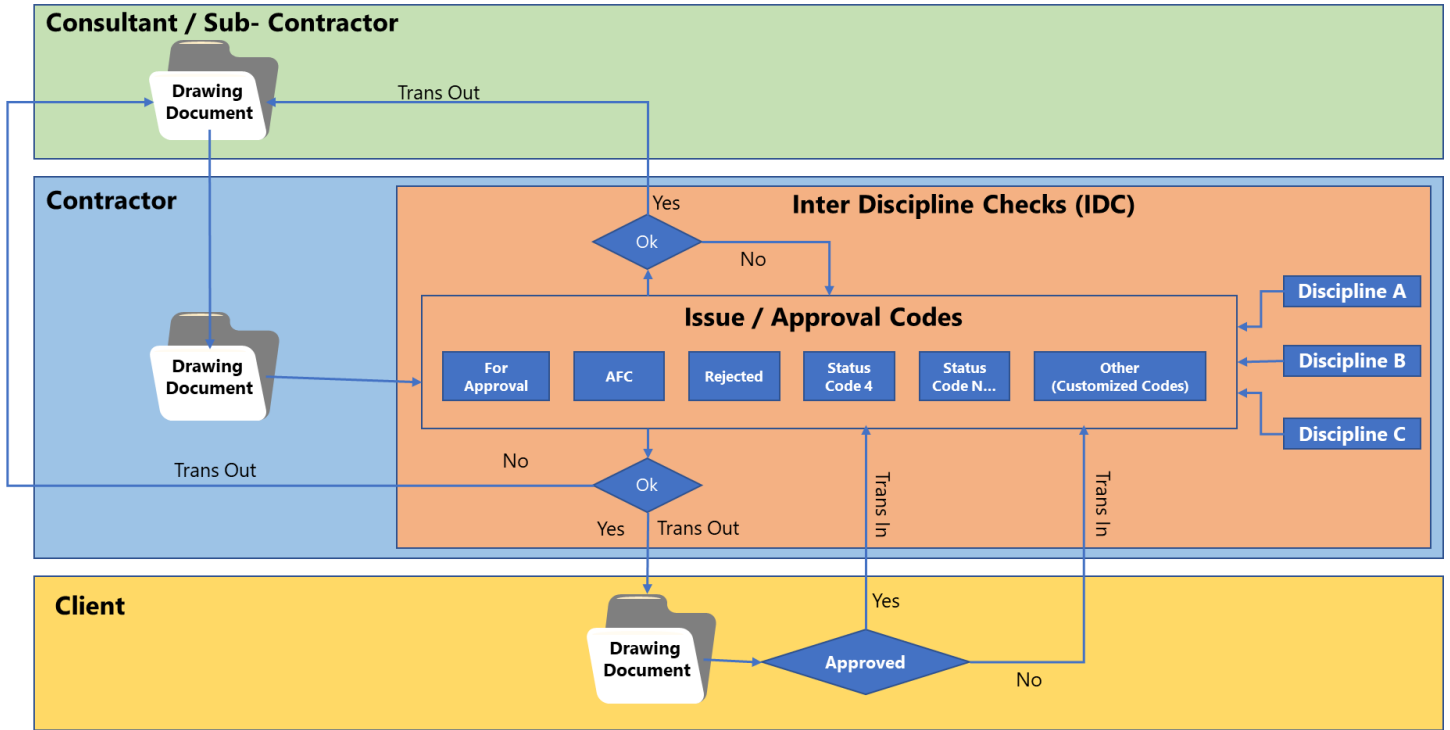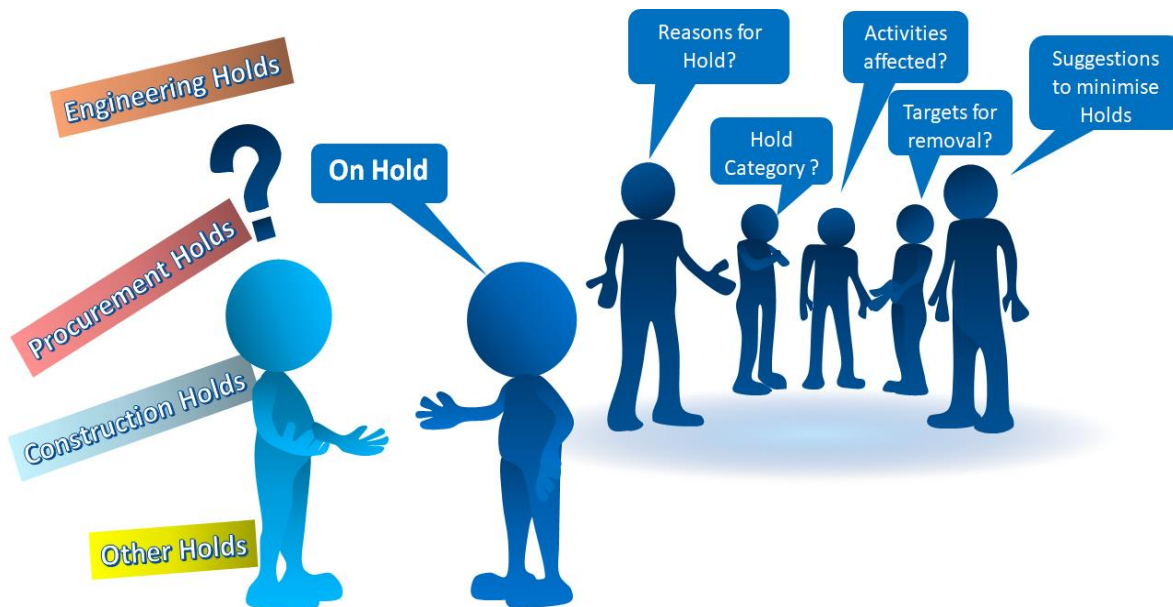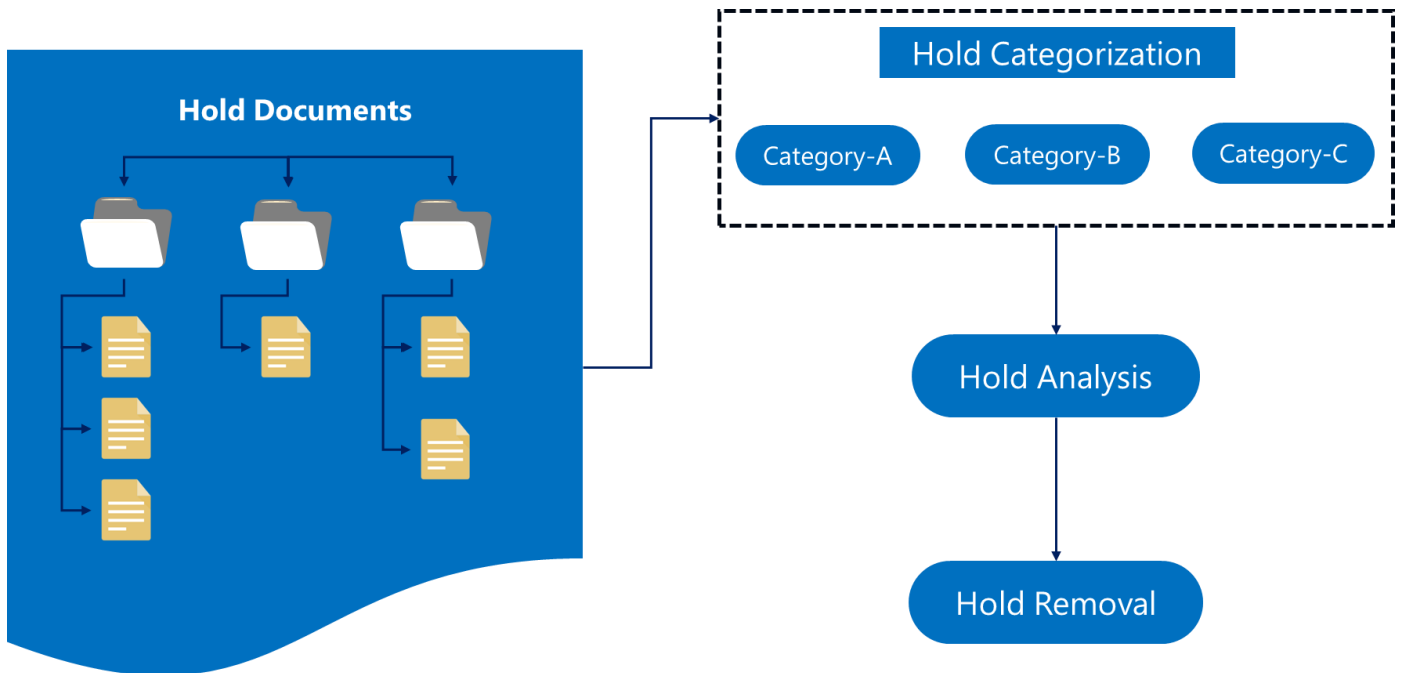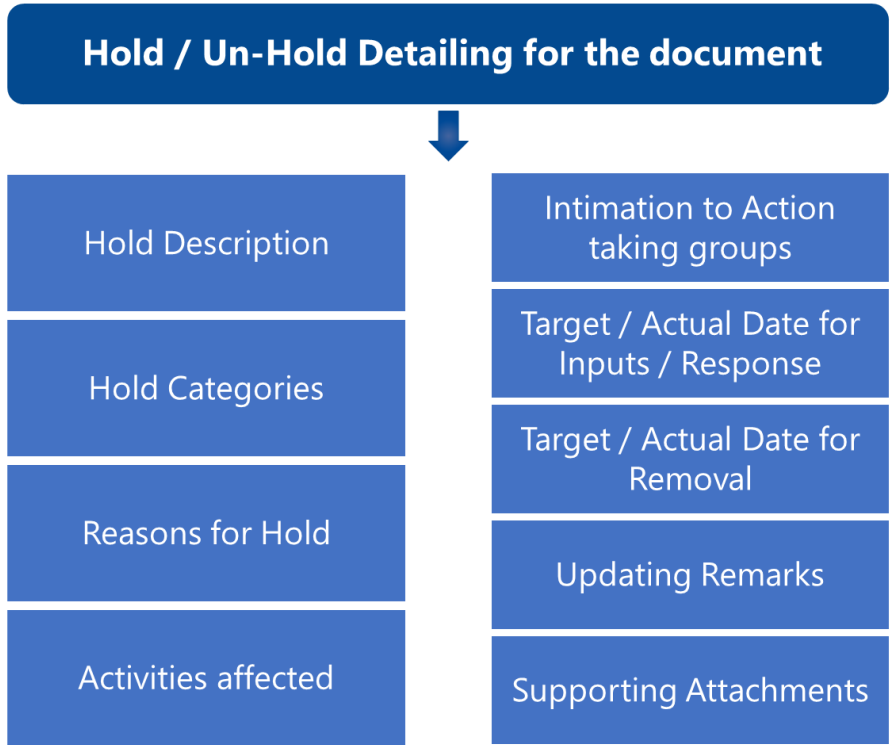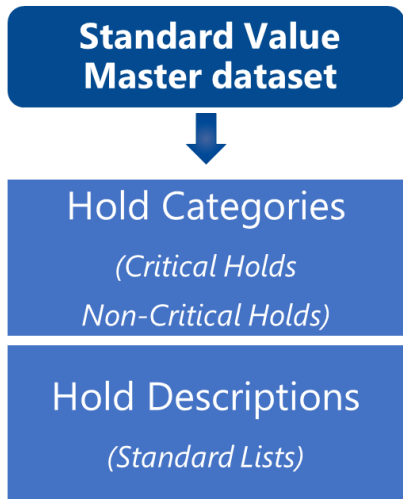

File Sharing

PROHOLD provides facility to manage holds in the project & effectively addresses the holds based on the following.

- Managing hold documents
- Maintaining hold register
- Associating timelines on hold management
- Alert triggers to stakeholders on missing hold resolution milestones
- Relating teams/ stakeholders against each hold point
- Analysing the impact of each hold on project progress (against functional activities, project planning activity ids)
- Distribution map of hold lists across project disciplines/functions
- Holds & hold resolution history sheet

PROHOLD Details

Standard Value Master dataset

Hold / Un-Hold Detailing for the document

Hold Categories
(Critical Holds
Non-Critical Holds)

Hold Descriptions
(Standard Lists)

Hold Description

Hold Categories

Reasons for Hold

Activities affected

Intimation to Action taking groups

Target / Actual Date for Inputs / Response

Target / Actual Date for Removal

Updating Remarks

Supporting Attachments

Hold Documents

Hold Categorization

Category-A   Category-B   Category-C

Hold Analysis

Hold Removal

- Document Index (DCI) Input type apart from File and Folder input is available. Engineering group's Isometric Drawing Transmittal management becomes very easy
- Document Hold Management in detail level is available
  - o **Hold Impact:** Due to the lack of system, it is a practice to write down the hold information on papers / diaries hence Holds becomes difficult to manage properly and as a result, work suffers
  - o **Delay Impact:** There is no history of Holds in any project and that's why the impact on delay of the project is not getting addressed into the close-out of the project. As a result, there is no learning on this, and suffering continues to the next project as well
- Integration with PGOLD progress monitoring and management Software modules is available
- Can be customized without taking much time
- Cost of Software and AMC is standard and affordable

Advantages

- Accessing data from anywhere & anytime
- User defined access rights & control
- Working in collaborated environment with various stakeholders in project
- Managing documentation of all disciplines & functions
- Single source for complete project documentation
- Upload & download document in one go

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