



## Construction Document Manager

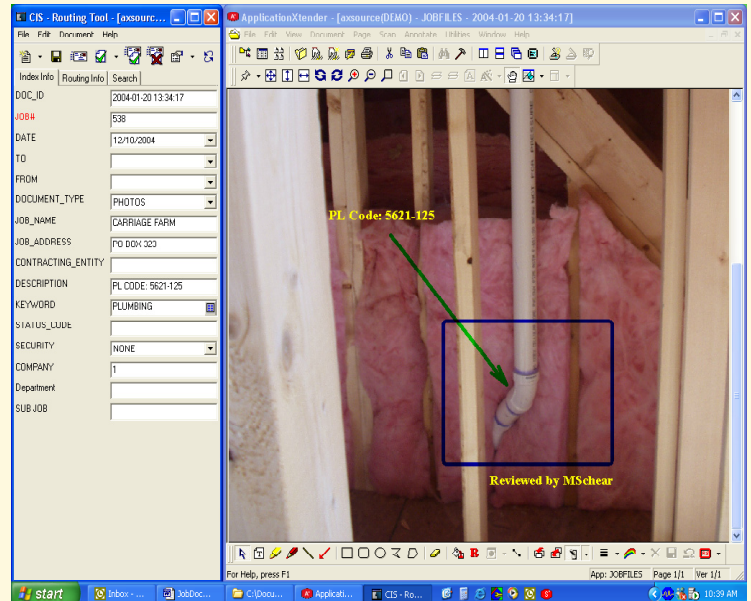
Routing and Archiving of Construction Documents- Construction Imaging's routing of construction documents allows routing of paper and non-paper documents both parallel and serial to designated users and at the same time capturing these documents in the imaging system and indexing them for later retrieval.

**Index Info** - Paper documents are received and scanned into the system in a batch. E-mail documents, printed reports, EDI documents, photos, and faxes could also be imported in a batch. The batch is opened and on the right side of the screen, the documents are displayed while on the left side of the screen a routing toolbar allows the indexing and routing of documents. Initially, documents could be either fully or partially indexed; additional indexing could be done later. As the sender is viewing each document, they enter the information required. Our system has a wizard that allows building a customized toolbar based on needs. Each company could customize the system to use their own titles.

**Routing Info** - Once the indexing is completed (partial or full), the document can be archived in the imaging system or archived and routed to selected users. The Routing Info Tab allows the document to be routed to one or more users at the same time.

### Items entered could include:

- Date: Either an automatic date stamp or one that is entered.
- To/From: Who the document is to or from (owner, vendor, GC, subcontractor, us); selected from a drop down box.
- Document Type: Selected from a drop down box; could include correspondence, submittal, RFI, photo, drawing, contract, change order, etc. \* Each document type allows for 8 unique additional fields.
- Number: Could be the PO number if PO is in document type, drawing number, etc.
- Descriptions: Up to three which could be subject and item; these can be customized to your descriptions.
- Keywords: Allows up to 128 characters separated by blanks for searching later.
- Security: Documents could be marked confidential.



(The document is routed to all at once in a parallel manner.) A routing list in serial order can be entered so the documents are routed in sequence. The route button saves the documents with the indexes entered, puts the routed person's code in a matrix so they will be presented with those documents routed to them, as well as writing a log record with a document number, key fields, who routed, and time and date. Once a box is checked for a group, those not wanted could be deselected.

**Receiving a Document** - When a recipient receives a document, they can view from whom the document was sent, as well as if it has been read or is waiting. The documents can then be re-routed and or "Marked as Read". Also, all documents over x number of days old that have not been opened can be reviewed and action taken. Annotations can be made on each document including "sticky notes", arrows, highlighting, voice notes, handwriting, and lines.

**Document Notification** - Doc Notify is used to notify users that they have documents waiting for review. An email can be generated telling the user that they have documents waiting to be read. As well, a list that can be printed showing all documents not accessed in xx days, etc. The several date and description index fields are flexible with additional fields for entry based on document type entered. This will allow logging drawings, insurance certificates, RFIs, and submittals. Logs can be printed.

**Searching** - After documents are entered they can be searched through the imaging system by any of the indexed fields to retrieve the range of documents needed. For example, all documents for a certain job for a date range with a certain document type can be

retrieved and read one at a time. These documents can be faxed, emailed, or printed. Also keyword searches can be initiated showing all documents with keywords entered such as "plumbing".

Optionally, documents can be indexed by every word (scanned documents are OCR'd) and all containing certain words or phrases can be viewed.

The real advantage of this system is that all documents entered into the system can be documented as who has viewed and approved or not viewed each document. As a byproduct, each document is archived and searchable by keyword, every word, or indexed fields. Now documents will not be lost and no one can say, "You never sent me that document".

