RimpeX PMIS

Document Management System

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Why RimpeX Document Management System?

Documents, whether electronic or paper, are an essential component of just about any enterprise. Managing business information, sometimes from several sources, can be a challenging task. Depending on the nature of your company, a document management (DM) solution that captures, stores and retrieves both paper and electronic documents can provide many key benefits to your organization.

The benefits of RimpeX DMS:

- Reduce storage space
- Enhance document security
- Increase productivity
- Increase efficiency
- Better collaboration and faster communications
- Improved client relations
- Backup and disaster recovery
- Reduces time and effort

Benefits – in detail:

- **Reduced Storage Space:** Commercial property costs are increasing and so is the expense to store paper documents. A software-based document management solution (DMS) that can reduce the need for file cabinets, boxes and storage bins is a valuable asset to any enterprise, freeing up precious office space. Documents that have to be kept as hard copies can often be stored in less expensive locations, such as an offsite warehouse or vault.

- **Enhanced Security:** Document security is vital to many enterprises. DMS provides better control over sensitive documents. Access to documents can be controlled at the folder level for different groups or individuals. Also, a DMS leaves an audit trail of who has viewed a document, when it was accessed and how it may have been modified. Managed documents are highly traceable and can be tagged to allow for automated alerts.

- **Improved Regulatory Compliance:** Compliance requirements for certain documents can be quite complex. Non-conformance can lead to fines, revoked licenses and in some cases criminal liability. DMS reduces the risk of non-compliance. Records retention schedules, for example, can be automated and new documents can be more easily classified and stored.

- **Easier Retrieval:** Searching for and retrieving documents can be very time consuming - and we all know time is money.

In fact, PWC published these statistics illustrating the costs related to the average time spent managing paper documents: Why document management systems?

- Organizations spend $20 in labour to file a document, $120 in labour to find a misfiled document and $220 in labour to reproduce a lost document.

- 7.5% of all documents get lost; 3% of the remainder get misfiled.

- Professionals spend 5 to 15% of their time reading information and up to 50% of their time looking for it.

A document management solution, specific for your enterprise, can be a powerful, time-saving tool. Depending on the solution implemented, a DMS can retrieve files by a word or phrase in a document – full text search, or DMS can apply index categories to a document or folder. Easier integration with business applications facilitates access to critical information. DMS also gives the opportunity to access documents remotely. As long as there is internet connection, documents can be accessed from virtually anywhere.

- **Better Collaboration:** Having a Document Management system in place promotes quicker and easier collaboration among employees, especially across geographic locations. With DMS, information sharing and collaboration can be a lot easier. Documents captured from different sources can be accessed from multiple locations. Electronic imaging makes sharing documents over a network via email or the Internet possible. DMS provides greater visibility to business processes and can allow better workflow monitoring. Authorized access by external users can be allowed and monitored. DMS also offers Version Control which allows older versions of the same document to be recovered if needed. This feature is important if several parties work on the same document and there are changes made to a document that were not authorized or meant to happen.

- **Better Backup and Disaster Recovery:** Any document management solution should include a data backup and disaster recovery plan. With digital archiving as a backup, paper documents are protected from fire and flood and other disasters. With a DMS, documents are highly traceable and can be tracked within a range of criteria.

Also, because imaged documents are centrally stored they cannot be lost or misplaced after viewing. Documents are less likely to be misfiled and if so they are easier to locate with cross-indexing. Documents can be digitized and archived at their point of entry into the system.

- **Reliable Document Version Control:** For large organizations, maintaining updated documents and keeping information current can often be a struggle. Our customers often run into that problem before moving to a Document Management system. By having document management software, it is easier to keep track of documents and keep them up-to-date. Users can simply upload a document then manage the updates and versions online.

- **Increase Productivity:** Uploading, editing, tracking and sharing documents takes half the time with a Document Management system. Because of this, it enables employees to be

more productive and ultimately more efficient. The time spent searching for documents through several different cabinets can now be used to get more work done.

The Intangible Benefits

A few of the intangible benefits of a document management system include:

- Flexibility
- Competitiveness
- Improved client relations
- Peace of mind

Time is valuable and time saved is a definite benefit of DMS that often translates directly into increased productivity. Faster and more efficient document retrieval can boost staff morale and increase client satisfaction. Also, document management solutions are scalable to meet the changing needs of any enterprise.

The features of RimpeX DMS:

- Custom made transmittal forms
- Attach unlimited number of files
- Manage work flow
- Archive and retrieve documents
- Notifications
- Signature
- Graphical Dashboards
- Maintain Document logs
- Automated reports
- Sub-contractor performance monitoring
- Revision control
- Review comments and history
- Flexible document classes & administration

These features will be explained in the upcoming chapters.

Transmittals

For most purposes, Submittals and Transmittals are documents exchanged during a building project, typically amongst Architects, Engineers and Construction (AEC) professionals. Most industries consider Submittals to be more of a preliminary step in the building process, sent with the expectation of forthcoming revisions or a request to be answered therein. Transmittals are typically sent as records, documentation or required materials (such as CAD drawing files) for the project. While Transmittals are still open to revision and collaboration, the sender is usually not seeking such changes or requesting the type of feedback as though it were a Submittal. Transmittals are communications that you send to any or all parties involved in a construction project, including owners, project managers, engineers, architects, inspectors and local government permitting agencies, etc.

There are two important reasons to use transmittals:

1. One is as a means of keeping track of the communications sent and received between the parties involved in a construction project so as to make sure nothing "falls through the cracks" in the complicated communication process.
2. The other is to maintain a record of all communications sent and received in case it is necessary to refer to that record for any reason, such as legal disputes or liability.

Submittals are documents that must accompany items being sent, such as sample materials, plans, etc. Submittals typically require a response from the recipient, so it is necessary to track when and whether a response has been received.

RFI's are documents that are sent to ask a specific question. RFI's require a response from the recipient, so it is necessary to track when and whether a response has been received.

Transmittals are communications that do not accompany any item and do not require a response. It is not necessary to track whether a response to a transmittal has been received.

Challenge

In most cases there will be approved transmittal forms to be used in a project. Therefore the employees are forced to keep a template of the approved format and modify on every individual transmittal. This is a burden for the document initiators and controllers to keep files with every transmittal.

RimpeX Document Management & Project Control System is capable of handling any type of transmittal forms prepared in MS Word or Excel.

Sample of a transmittal form:

Logo (Contractor)	Logo (Client)	Logo (Engineer)

Project:_____

Inspection Request

Ref. No. _____
Rev. No. _____

Originator of IR	D Sivanesan	Date:	
Location/Area of Insp.		Insp. Date:	
Authorised Sign:		Insp. Time	

Type of Work

☐ Architectural ☐ Structural ☐ Electrical ☐ HVAC ☐ Interior Design
☐ Infrastructure ☐ Landscape ☐ Mechanical ☐ Survey ☐ Others (Specify)......................

Work element to be Inspected:	For Concrete Works :
	Volume:
	Cement: SRC / OPC
	Start Time:
Attachments: ☐ Contrator's QA/QC Checklist ☐ Survey Data ☐ Contractor's Snaglist	Finish Time:
☐ Part Plan in A4 (highlighted) ☐ MEP Clearance ☐ Others (Specify)..............	Temperature:

The Contractor hereby certifies that the works are executed in accordance with the approved drawings, specifications and local authority regulations.

Contractor's QA/QC Engineer Sign:	Date:	
Contractor's PM Sign:	Date:	
Engineer Received Sign:	Ref.No	

Coordination of other Disciplines	Inspection Request No:	Engineer's comments
Electrical Inspection ☐ Yes ☐ No ☐ N/A		
Mechanical Inspection ☐ Yes ☐ No ☐ N/A		
Civil & Survey Insp ☐ Yes ☐ No ☐ N/A		
Others (Specify)...... ☐ Yes ☐ No ☐ N/A		Inspected By: Date:

Checking and approval by the Consultant / Subconsultant / Employer shall not relieve the Contractor of his obligation to perform the work in accordance with the Contract Documents, Requirements of Safety, and Local Authorities regulations.

Resident Engineer's Comments:	
	☐ Code A - Approved
	☐ Code B - Approved As Noted, Resubmit
	☐ Code C - Not Approved, Resubmit
	☐ Code D - Information, Record
	☐ Code E - Incomplete, Resubmit

RE Sign:	Date:	
	Ref. No	
Contractor Recived Sign:	Date:	

PROPERTY SITE   Form No.S-1, Rev 00

RimpeX is capable of defining any number of custom data items in a document class and to use them while generating a transmittal. This data will be filled automatically in the predefined transmittal form as shown below:

You can also configure check boxes, combos, radio buttons, date picker etc in the custom data items that will be displayed on the predefined transmittal form automatically.

Signature

When you complete checking or approving the transmittal, your signature can be displayed on the transmittal form automatically at the desired place. The signature can be registered through your mobile app.

Paperless World

RimpeX creates a paperless world with proper tracking and retrieval facility. RimpeX also allows you to make hard copy print of the transmittals if required.

Attachments

You can attach as many files as you want with a document or transmittal. The attachments may be of different types like pictures, drawings, Word/Excel documents, PDFs etc. The attachments will be displayed in a classified and systematic manner based on time and type of the attachment. This will help you to locate the required attachment. You may attach an unlimited number of attachments, archive them, delete them, revise and make changes to them. The following screenshot may give you an insight on how the attachments will be displayed.

Workflow Management

A workflow consists of an orchestrated and repeatable pattern of business activity enabled by the systematic organization of resources into processes that transform materials, provide services or process information.

RimpeX DMS enables you to create flexible workflow structures. You will also be able to see the stages involved and the current status of the process. Each of the stages involved in the process will have a deadline or time duration. If the time taken to complete the stage or process exceeds the prescribed duration, a delay notification will be sent to the responsible individuals. An escalation notification will also be sent if the delay is too much.

This feature will enable you to see the workflow structure (from the date of initiation till the date of approval or closure) for a document (or process) and the current status. It will also help to finish the process faster as you have the complete workflow structure and know where it needs to go next. It also helps in better productivity, faster communication and completion of the project, because document management directly influences project controlling and scheduling.

Notifications

Email and mobile notifications will be sent automatically from the system in the following cases:

- **New Posts**
  When a new item has been posted from the site using mobile app or from the computer in the office, notifications will be sent to the responsible persons as shown in the following sample:
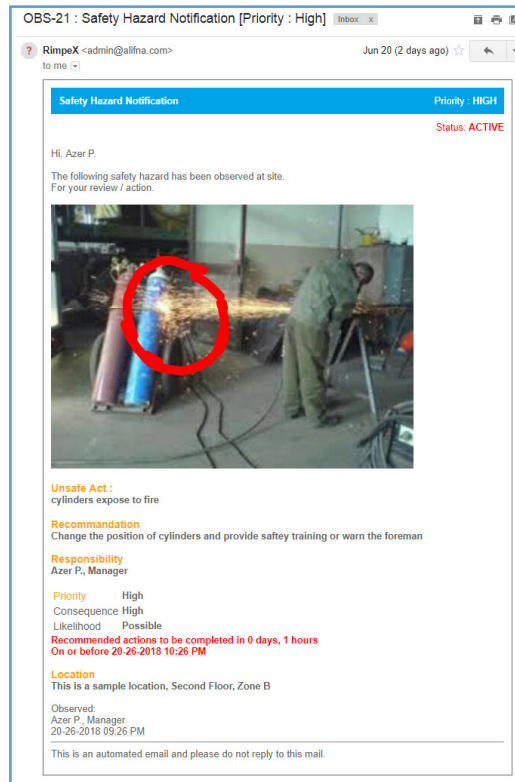
- **Delay Notification**
  If action is delayed beyond the prescribed time duration, then a delay notification will be sent from the system.

- **Action Notification**
  If an important action is completed then an action completion notification can be sent from the system. Example: If the process is to get NOC from authority. Then, once the task is accomplished, the system will send a notification stating NOC received.

- **Escalation Notification**
  If the action is delayed beyond control, then the issue will be escalated to higher management with respect to the configuration set for this process.

Review, Comment & History

RimpeX automatically creates history in the following cases:

1. Time and date when an email/mobile notification is sent from the system.
2. When the receiver has viewed the document.
3. Comments posted by whom, what and when.
4. You can also see the actions taken (workflow actions), by whom and the date and time of action taken.
5. The documentation logs will help you identify when and who has made changes to the document. A sample is presented below:.

Custom Data Flexibility

This flexible feature of RimpeX will enable you to configure various forms. User friendly interface will help you to add or delete data fields (like text boxes, combo boxes, checkboxes, date and time pickers, radio buttons) and customize any form based on information required. You can easily define different forms for different processes and events. The customizations of these forms are so simple that you will not need any help from the RimpeX support team once you get the hang of it.

Revision Control

Version control is important for documents that undergo a lot of revision and redrafting and is particularly important for electronic documents because they can easily be changed by a number of different users. These changes may not be immediately apparent. Knowing which version of a document you are looking at is important, for example, if you are trying to find out which version of a policy is currently in force or which version of a policy was in use at a particular time. Version control is also important if you are working on a collaborative document with a number of contributors and/or with frequent revisions.

Traceability: When creating and developing documents such as formal project documents, version control allows you to identify the development of the document e.g. many versions of a draft and final, over a prolonged period. This allows traceability – retention of drafts and detail of changes made, often as a result of contributions from multiple collaborators within document development, the order of changes and a record of those versions of documents regarded as final and/or approved by relevant groups or individuals.

In RimpeX DMS: All documents will be identifiable by filename, author and date. Multiple versions of documents can be distinguished and the latest version identified. Old/multiple and potentially out of date/misleading hard copies can be destroyed. Definitive versions may be stored in a given physical and/or electronic storage location. Readers are less likely to be misled through access to multiple and conflicting document versions. Definitive versions of significant documents should be given read-only status to general readership. Thus, allowing changes to be controlled.

RimpeX DMS provides user friendly document logs that will immensely help in revision control.
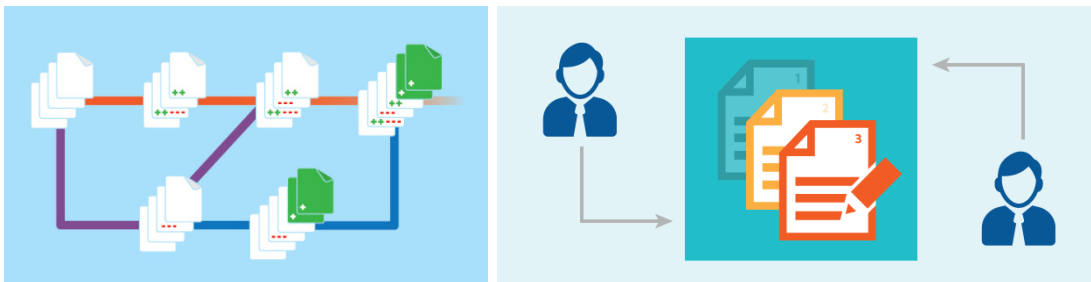
Customizable Analytics & Dashboards

RimpeX has wide range of graphs and charts customizable with respect to the type of document class. When you customize your analytics options, the information you can derive from your data becomes virtually unlimited. With RimpeX you have the ability to drill down into fine details and discover correlations you wouldn't see otherwise.

This feature of RimpeX will also help in organizing data for your presentations or meetings. And the automated graphical representation of data will also help the audience to understand the figures and their importance.

Dashboards also can be customized and grouped with selected classes of documents, based on functions.
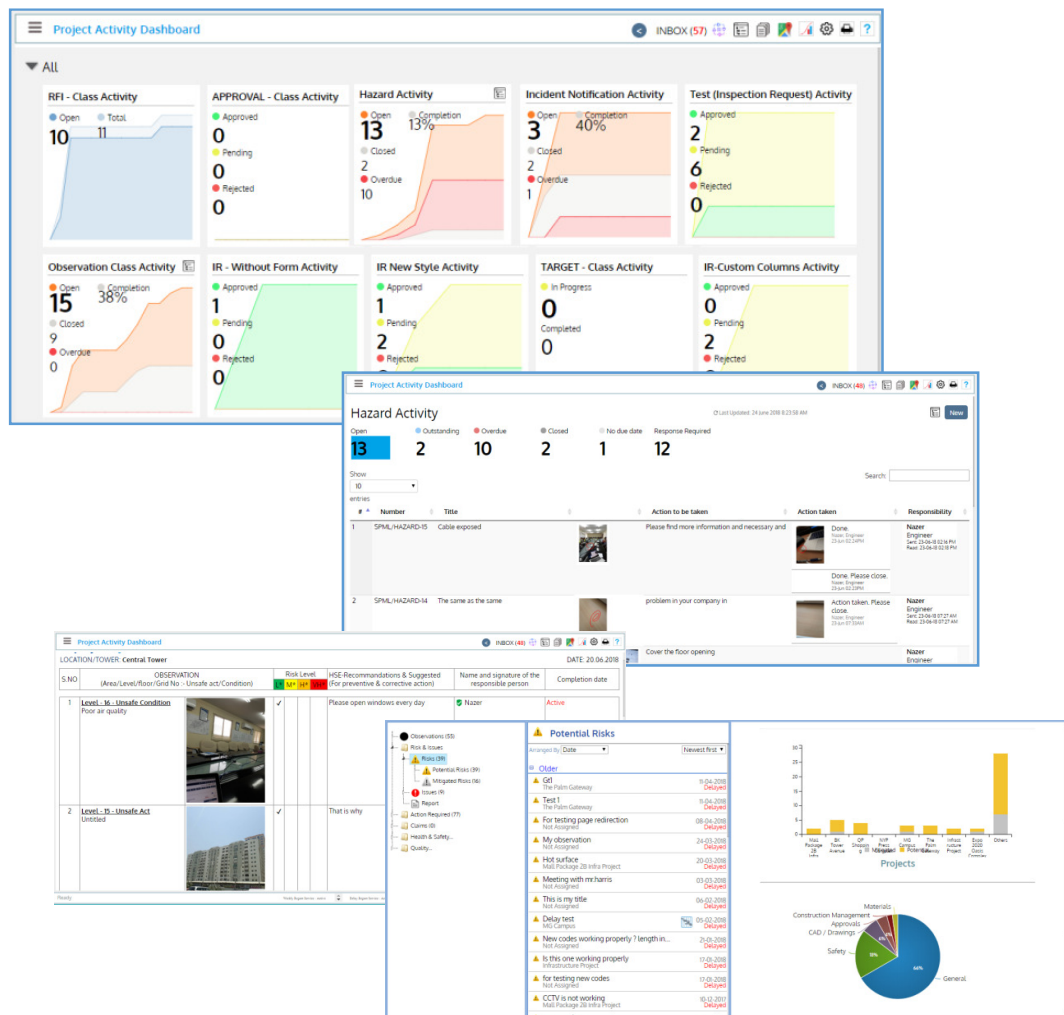
Subcontractor Management

There would be a number of subcontractors working on large and complex projects. This feature of RimpeX DMS will help you to evaluate the quality of the work done and project delivery of the subcontractor. This can be done so by making sub-contractor-wise analysis of safety hazards, snags, non-conformances, delays, outstanding issues, etc. This can help the management to identify the most productive subcontractor.
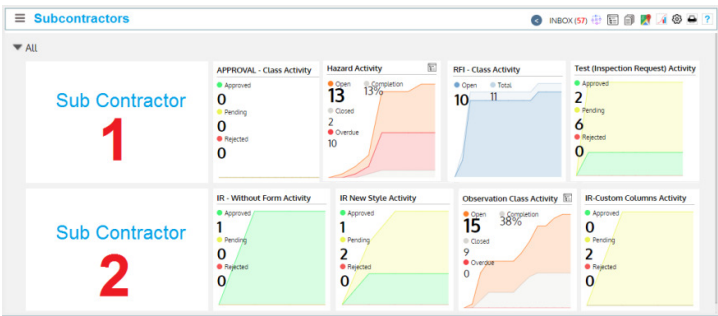
Real-Time Logs & Reports

Flexible reporting will allow each team to get exactly what they are looking for without the need to sift through the data they don't need or accidentally exclude something important.

Perhaps one of the most important benefits of customizable, real-time reporting is the effect it has on your ability to act on and react to changes in your project or organization.
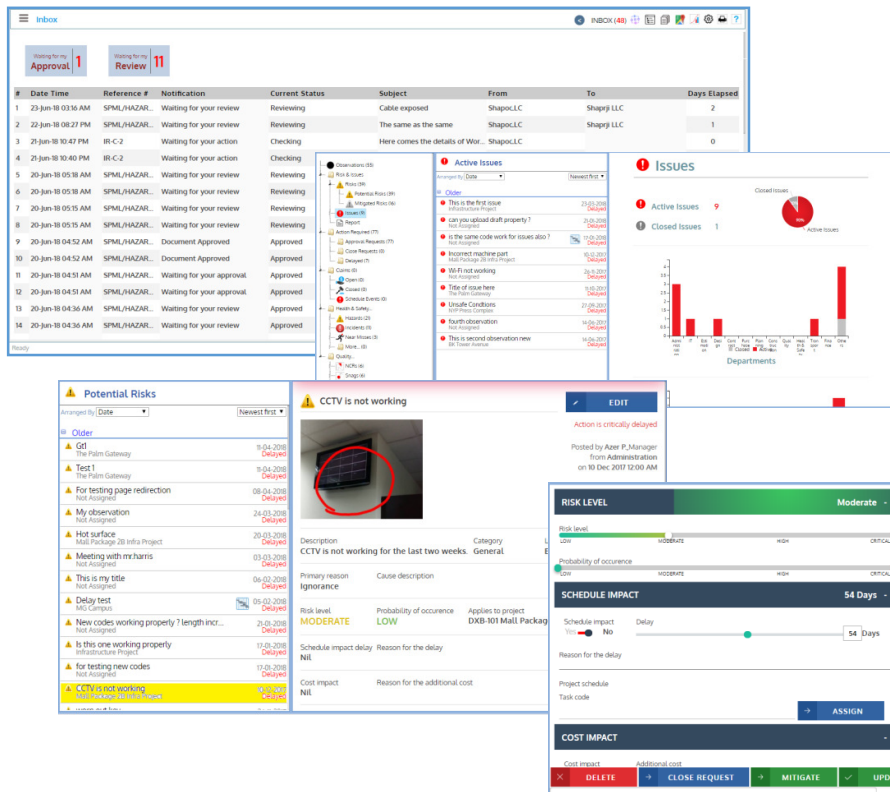
BIM Visibility

In RimpeX, active issues and outstanding documents such as hazards, NCR, pending approvals, targets, etc will be displayed on the BIM view as shown below. You can see it on the project elevation or on the floor plans with the icons set on document classes. Drill down to see details and click again to manage the entire document.

For more information, refer: RX-005-RimpeX-BIM.PDF

Mobile Apps

RimpeX DMS include mobile apps which will help you initiate documents (like non-conformance, safety hazard report, snag, etc.) using the approved format for reporting them. You can also monitor or view the current status of any activity taking place in the project from anywhere, any time. This feature will also enable you to take immediate action regarding any activity that is under your supervision (e.g: approving a document). The user interface of the app for your smart phone is slightly different from the interface for your tablet. The larger screen size of the tablet will enable you to view project drawings more comfortably.

Site Observations

Take photo, Enter details &Report using mobile app.

Notifications

Send email notification to the responsible person or sub contractor.

RimpeX
Mobile
App

Take Action

Take suitable action and send close request.

Review & Close

Review the situation and close.

For more information refer:
RX-002-RimpeX-SITE.PDF
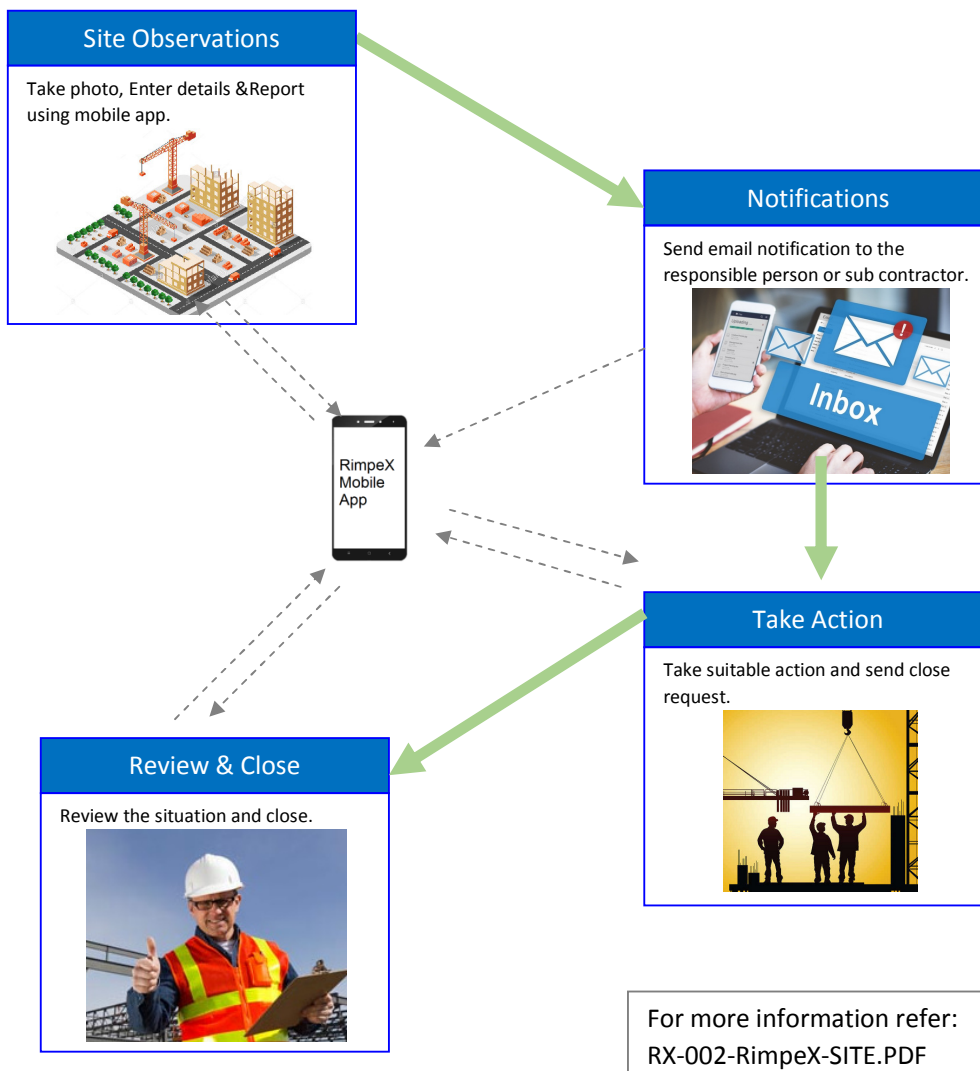
Archive & Retrieval

Any construction project includes a large number of documents. Even though the Document Management System aims for paperless, easy storage and management of documents but, it is crucial to maintain hard copies of some selected important documents. RimpeX DMS archives all documents even after the project is completed. Some documents will be required even years after the project is completed.

You will be able to retrieve or search for documents by looking for keywords, phrases, author, document numbers, date of documentation, type of document, status, etc.

Administration

One of the most obvious benefits of being able to customize your analytics and reporting options is the ability to customize data for different uses. Each department, and even teams within a department, will be looking at data from a different perspective. Scheduling will be interested in one set of data, while safety department will want to see another and the development team will have their own agenda too.

Get More Details

This document (RX-001-RimpeX-DMS) is a summary of RimpeX Document Management System. If you want to know more about the system, you can read related documents as recommended below:

1. Visit http://www.rimpexPMIS.com

2. Select Docs or Download Docs from The Downloads menu:

3. Click on the following documents to learn more:

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