



Scenario Document & Drawing Management

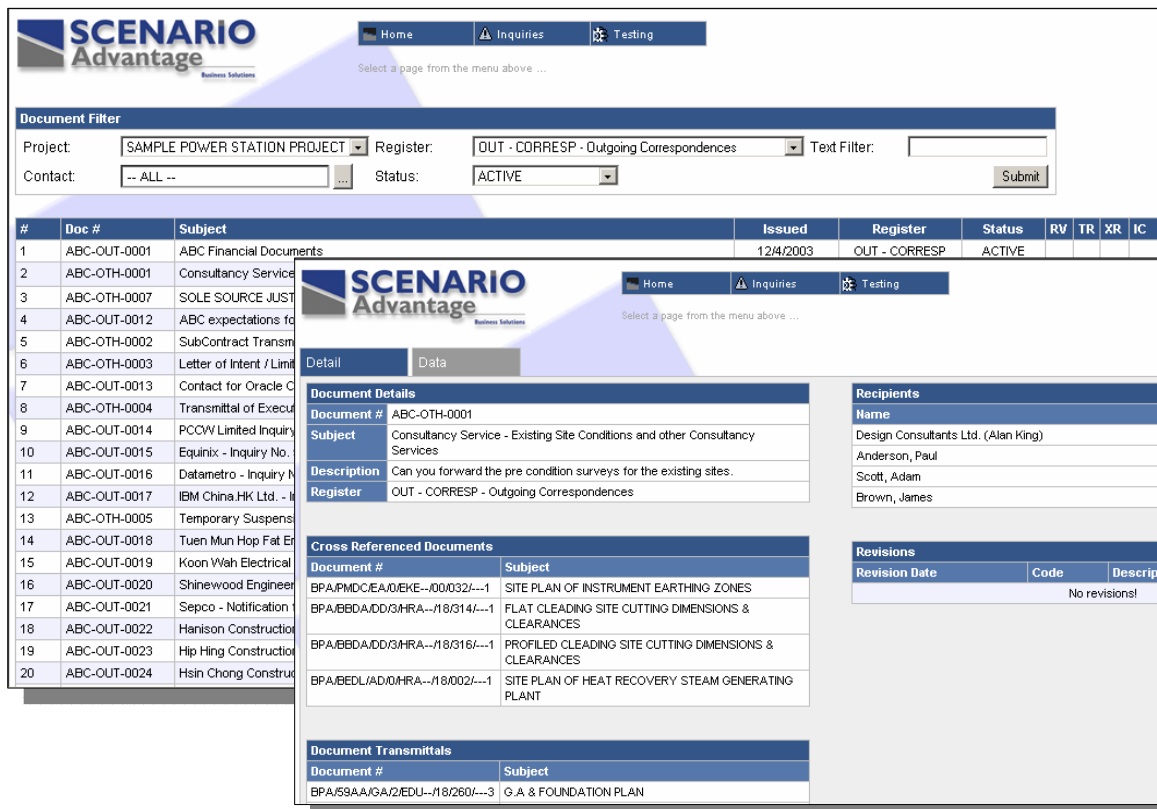
Summary

The Scenario Document and Drawing Management solution (DDM) is designed for organisations with the following needs:

- A full range of communications and document registers which are customizable according to individual organizational requirements
- Master Document Register
- Revision/version controls of documents including resending of revised drawings to previous recipients
- Ability to route documents for action and to provide alerts for overdue and outstanding issues and assists in task and priority planning
- Complete audit trail and histories of all correspondences and documents

Scenario Document and Drawing Management can be provided as a standalone project or enterprise solution complete with controlled document repositories. Scenario DDM is also integrated with your organization's existing internal network drives for file storage ('you' own the data).

Communication Registers	Revised Document Registers
<input type="checkbox"/> Incoming Correspondences	<input type="checkbox"/> Controlled Documents (revision control)
<input type="checkbox"/> Outgoing Correspondences	<input type="checkbox"/> Technical Documents (revision control)
<input type="checkbox"/> Incoming Transmittals	<input type="checkbox"/> Drawings (revision control)
<input type="checkbox"/> Outgoing Transmittals	
Other Customizable Forms	Routing Alerts Desktop
<input type="checkbox"/> Site Instructions	<input type="checkbox"/> Show all new items
<input type="checkbox"/> RFIs – Request For Information	<input type="checkbox"/> Show all outstanding and overdue items
<input type="checkbox"/> Variation or Change Orders	<input type="checkbox"/> By project or individual
<input type="checkbox"/> Defects / NCR's	
Reports	
<input type="checkbox"/> Range of Customised Report as per organization's individual requirements	



The screenshot shows the 'Scenario Advantage' web interface. At the top, there are navigation tabs for 'Home', 'Inquiries', and 'Testing'. Below this is a 'Document Filter' section with dropdown menus for 'Project' (SAMPLE POWER STATION PROJECT), 'Register' (OUT - CORRESP - Outgoing Correspondences), and 'Status' (ACTIVE). A 'Text Filter' input field and a 'Submit' button are also present.

The main content area displays a table of documents with columns: #, Doc #, Subject, Issued, Register, Status, RV, TR, XR, IC. The table lists 20 documents, with the first few being:

#	Doc #	Subject	Issued	Register	Status	RV	TR	XR	IC
1	ABC-OUT-0001	ABC Financial Documents	12/4/2003	OUT - CORRESP	ACTIVE				
2	ABC-OTH-0001	Consultancy Service							
3	ABC-OTH-0007	SOLE SOURCE JUST							
4	ABC-OUT-0012	ABC expectations fo							
5	ABC-OTH-0002	SubContract Transm							
6	ABC-OTH-0003	Letter of Intent / Limi							
7	ABC-OUT-0013	Contact for Oracle C							
8	ABC-OTH-0004	Transmittal of Execu							
9	ABC-OUT-0014	PCCW Limited Inquiry							
10	ABC-OUT-0015	Equinix - Inquiry No.							
11	ABC-OUT-0016	Datametro - Inquiry N							
12	ABC-OUT-0017	IBM China.HK Ltd. - I							
13	ABC-OTH-0005	Temporary Suspens							
14	ABC-OUT-0018	Tuen Mun Hop Fat Er							
15	ABC-OUT-0019	Koon Wah Electrical							
16	ABC-OUT-0020	Shinewood Engineer							
17	ABC-OUT-0021	Sepco - Notification							
18	ABC-OUT-0022	Hanison Constructio							
19	ABC-OUT-0023	Hip Hing Constructio							
20	ABC-OUT-0024	Hsin Chong Construc							

Below the table, there are several detail panels:

- Document Details:** Shows information for document ABC-OTH-0001, including its subject, description, and register.
- Recipients:** Lists recipients for the document: Design Consultants Ltd. (Alan King), Anderson, Paul, Scott, Adam, and Brown, James.
- Revisions:** A table showing revision history. In this case, it states 'No revisions!'.
- Cross Referenced Documents:** Lists other documents related to the current one, such as 'SITE PLAN OF INSTRUMENT EARTHING ZONES' and 'FLAT CLEADING SITE CUTTING DIMENSIONS & CLEARANCES'.
- Document Transmittals:** Shows transmittal information for document G-A & FOUNDATION PLAN.

Typical DDM Intranet Screens

General

Document and Drawing Management solution (DDM) provides a flexible means of administering the different types of communications that take place between the various parties on a project. This includes communications generated by you (outgoing and internal) as well as recording details of incoming.

Communication is a generic term and includes such document types as:

- Letter, Fax, memo
- Request For Information (RFI)
- Site Instruction
- Drawing
- Specification
- Quotation price request, tender request.

A key aspect of DDM is the ability to:

- Define generic communication or document types for the database or for a particular project
- Have an associated register for each document type.

Where there are documents such as drawings, method statements, samples and specifications, which are subject to revision:

- The revision history is fully tracked
- Ability to automatically send revised documents to previous recipients.

Each communication has an owner or person responsible for a document. This by default may be the project manager, but is usually assigned to someone on the project administration team.

However, a document may then be routed to a number of people who need to action within specified time frames. At each stage, a document may be assigned to a particular user or number of users (eg. comment required by 'all by a review meeting date').

While you have the ability to define communication types, standard documents are provided allowing immediate use of the software – ie. 'ready to go out of the box'.

Standard Documents or Communications

DDM provides you with a standard set of documents or communications to use if you do not need to define your own documents.

Following is a list of standard documents that are available:

Incoming

- Letter
- Fax
- Architect's / Engineer's Instruction (AI / EI)
- Request for Information (RFI)
- Drawing Transmittal
- Drawing Register.

Outgoing

- Letter
- Fax
- Design Advice
- Site Instruction
- Drawing Transmittal.

Each of these documents can be printed, e-mailed, or viewed on screen.

Define Your Own Registers

DDM includes a Document Designer that gives you the flexibility to define your own document registers and layouts (using drop and drag functionality) for the form entry screens and table views.

DDM will handle:

- Communications with your client
- Communications with the consultants
- Communications with the contractor where you are a developer or client's representative
- Communications with subcontractors and suppliers
- Communications with various authorities (eg. Government, utilities).

The ability to be able to generate new communication types or project specific types, for any of the above provides tremendous flexibility to meet varying client and project needs.

Master Document Register

There is an overall master document register as well as registers for each document type.

Extensive filtering is provided to allow fast searching and retrieval of documents and drawings.

Standard feature of Scenario Advantage is export to Excel and this allows the ready export of document and drawing register lists to Excel.

DDM Intranet

For casual users, especially site personnel, web based inquiry allows quick access to the document registers. For external parties, allows secured access.

Functions include:

- Defaults to 'your' document for the project
- Master document register
- Range of filters
- Ability to view, print, e-mail
- Can add Internal Comments to documents
- Drill-down the document trail – to cross referenced documents, view attachments, detail data for each document
- Download and upload attachment files, eg. PDF drawings.

Project Contacts & Roles

DDM gives you the ability to define Contact Groups. Contact groups defined in the standard configuration are:

- Clients
- Consultants
- Authorities
- Specialty Contractor's / Subcontractors
- Suppliers
- Utilities
- Financiers
- Us.

The above groups are used to sub-divide the enterprise's full contact list into more manageable categories for use on a specific project. Global contact access is still available.

Some other features provided by the Contact maintenance function are:

- User may define their own "My Favourite Contact Lists" where they can add frequently used contacts
- Ability to assign specific contacts to projects, i.e. project group contacts
- Ability to copy specific contacts from an existing project to a new project.

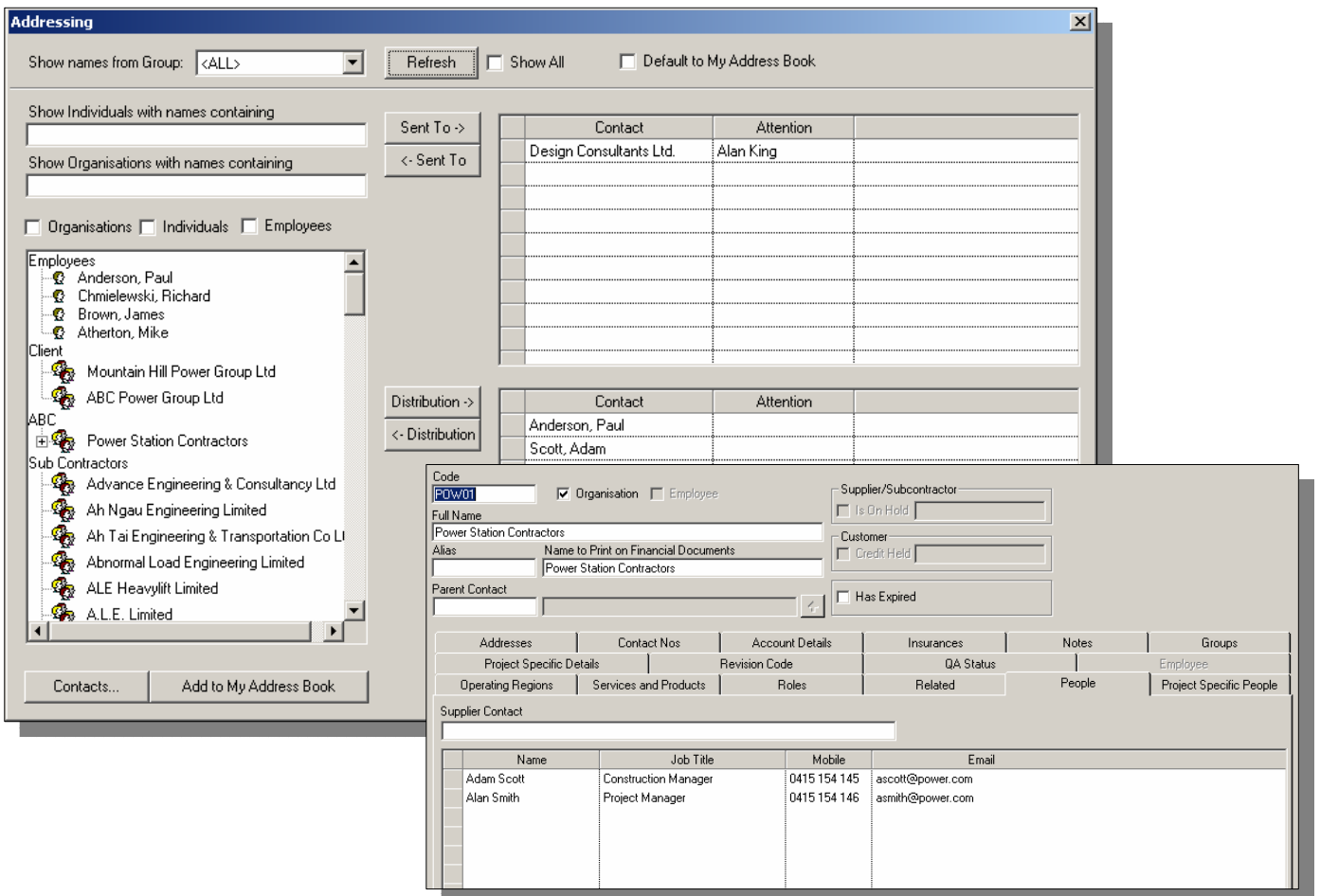
Entry of Communications

Typical data that can be entered includes:

- Various dates - Issued, Received, Respond By Date
- Status – Draft, Active, Closed Out (user-definable)
- Cross-reference links to other documents and ability to close out documents while cross-referencing
- Select To/From/CC/Bcc parties in the address dialogue box complete with 'My Address' searching
- Link to attachments
- Revision entry & tracking
- Internal comments by project staff
- Formatted rich text capability
- Cost and budget implications
- Schedule impact
- Routing – external and internal
- Cross-reference to contract adjustments (eg. variations, contractual claims).

Routing is an optional item and features included are:

- Nominate recipients and action by date
- Escalation days
- Copy, action
- Consolidator
- Action Required.



The screenshot displays the 'Addressing' window with the following components:

- Top Bar:** 'Show names from Group: <ALL>' with a 'Refresh' button and checkboxes for 'Show All' and 'Default to My Address Book'.
- Search Fields:** 'Show Individuals with names containing' and 'Show Organisations with names containing'.
- Filtering:** Checkboxes for 'Organisations', 'Individuals', and 'Employees'.
- Tree View:** A hierarchical list of contacts under categories: Employees (Anderson, Paul; Chmielewski, Richard; Brown, James; Atherton, Mike), Client (Mountain Hill Power Group Ltd; ABC Power Group Ltd), ABC (Power Station Contractors), and Sub Contractors (Advance Engineering & Consultancy Ltd; Ah Ngau Engineering Limited; Ah Tai Engineering & Transportation Co Li; Abnormal Load Engineering Limited; ALE Heavylift Limited; A.L.E. Limited).
- Buttons:** 'Sent To ->', '<- Sent To', 'Distribution ->', and '<- Distribution'.
- Tables:**
 - Table 1:**

Contact	Attention
Design Consultants Ltd	Alan King
 - Table 2:**

Contact	Attention
Anderson, Paul	
Scott, Adam	
- Details Panel (Bottom Right):**
 - Code: POW01 (checked for Organisation, unchecked for Employee)
 - Supplier/Subcontractor: Is On Hold
 - Full Name: Power Station Contractors
 - Alias: Name to Print on Financial Documents (Power Station Contractors)
 - Customer: Credit Held
 - Parent Contact: Has Expired
 - Grid with columns: Addresses, Contact Nos, Account Details, Insurances, Notes, Groups, Project Specific Details, Revision Code, QA Status, Employee, Operating Regions, Services and Products, Roles, Related, People, Project Specific People.
 - Supplier Contact:
 - Table with columns: Name, Job Title, Mobile, Email.

Name	Job Title	Mobile	Email
Adam Scott	Construction Manager	0415 154 145	ascott@power.com
Alan Smith	Project Manager	0415 154 146	asmith@power.com

Revision Control

- Primarily used for drawings
- Registers defined as holding Revised documents
- Full audit trail of revision history
- Ability to view previous recipient history
- Ability to attach drawings via hyperlink to the individual revision code
- Function to auto-generate transmittals to previous recipients.

Attachments

- Allows softcopy received to be attached to the incoming correspondence entry
- Allows outgoing correspondence produced by DDM to be linked to the softcopy documents – similar to e-mail attachments
- Option to attach – at user discretion – when generating outgoing e-mails
- Ability to attach different drawing file to each corresponding drawing revision
- Ability to open attached documents using relevant software, eg. Word, PDF, PowerPoint.

Contractual Clauses

- Can define clauses globally, business entity or project
- Allows standards to be used across all projects if needed
- Can be selected and inserted on outgoing documents.

XML Import of Register Definitions

- Registers can be defined in one database and exported in XML format
- Import XML register definition.

Excel/Access Data Import

Function provided to import data from existing Excel or Access registers to initialise DDM.

- Import of revised and non-revised documents
- Import document mapping to DDM register
- Data validation.

Reports & Output

A range of reports are available. Due to the flexibility of DDM, client specific reports are often written.

Output is by:

- Printed reports
- Crystal Reports Forms including via e-mail
- PDF.

Routing Alerts Desktop or 'Ball in Court' Window

This is an inquiry window, which highlights the items needing attention at a certain date. This can be viewed for:

- Current logged in user
- Project overall
- Number of projects (eg. for the commercial manager).

Items listed include:

- Display all documents addressed to 'me' – either as a To or a CC or From received for the last 2 weeks.
- Ability to reply to an outstanding document, which in turn will cross reference and close out the outstanding document (eg RFI received > RRFI sent)

Security Profiles

- Security profiles by groups defined in System Manager
- DDM register access control is via security profiles
- Profiles include:
 - Ability to View documents only
 - Add / edit control
 - E-mail output control.

© 2007 Projection International Limited. Scenario Advantage and Scenario DDM are trademarks of Projection International Limited.

Whilst the information herein was correct at the time of printing, Projection reserves the right to change the specifications, functionality or withdraw supply of the software described herein without notice.

PRO-DDM-MKT-0001.DOC - Rev No AC – 2007-03-03