

## About the Pro Suite Document Access Service <sup>1 August 2022</sup>

**ELECTRONIC DOCUMENT PURCHASE • CREATION • COLLABORATION • COMPLETION • SIGNING • REPLICATION • STORAGE  
& ON-LINE TENDERING**

The Pro Suite Document Access Service uses the e-DOCX Document Productivity Platform. The Information related to your company's electronic purchase of Documents is securely stored on-line, in the "Cloud".

### **e-DOCX - the Platform for the Pro Suite Document Access Services**

Pro Suite is the name given to the Document Access Services that are available on the e-DOCX Platform and are part of e-CLOUD Construction®. These Document Access Services contain Documents Suites provided by third-party organisations like PROCSA, JBCC, CESA etc. These Document Suites have been harmonized, so that any Document purchased uses the same Project information for its creation and use. The features described also include those only available to Premium Subscribers.

### **User Registration, Login and Data**

Pro Suite Users are initially required to Register either themselves or their Company's details on the system and are provided with a password that they can change at any time. Their e-mail address is the login username. This registration process enables the System to identify the User as an 'Office Administrator' and displays company status information upon login.

### **Company Status Information**

Pro Suite displays the following company information upon login at the top of each page:

The User's Company name, User's Name, User's System Designation. It also gives the current Company Office balance of 'e-CLOUD Credits' that are available for the purchase of Documents.

### **Company Office Account**

Pro Suite provides the User with access to the following:

1. Ability to set up a 'Project Administrators' and 'Office Users'
2. Company Office Reports (This information is always kept secure and extremely confidential)
  - a. Document Purchase Statement – by Company Office
  - b. Document Purchase Statement – by Project. (A List of your Company's Projects with links to the Documents created for those Projects)
  - c. Document price list
  - d. View List of Documents Purchased – by Project
  - e. View List of Documents Purchased – by Document Suite
  - f. Transaction History Report
  - g. List of 'Credits' purchase Invoices
  - h. A list of all the Company Office's Users and their 'Roles' with an update facility
  - i. A list of Company Office Document Collaborators with set-up facility

### **Document Suite Index**

Pro Suite has a Suite Home Page for each Suite of Documents accessible when Users log for a particular Document Pro Suite. Additional Document Suites are accessed via a dropdown menu. In addition, the following is available:

- a. Document Prices per Document Suite
- b. Purchase 'e-CLOUD Credits' facility by Credit card or by Electronic Funds Transfer (EFT). e-CLOUD Credits are used to purchase Documents, Special Support and Online Training etc.
- c. User Instructions
- d. Users' Company Office Account
- e. Customer Support - Help Videos, User Guides, access to a 'Help Desk' during office hours

## e-DOCX Administration

The e-DOCX Platform has a full Administrative 'backend' that allows detailed user support and maintenance.

### Pro Suite Productivity Facilities

The major productivity facility is that the information about a new Project only needs to be set-up once. This Project information is then inserted into any new Document purchased and created, irrespective of the Document Suite; saving a considerable amount of time in the completion of the Documents. In order to save even more time, information from a company's existing Projects is remembered, so that for example, if you have the same Architect on a new Project, you can select that Architectural company's name and its details will be automatically captured for your new Project. The Productivity Facilities are listed below:

#### Capturing new Project Information to be inserted into Documents

- **Mandatory Project Details:** the Project's name and Reference number is captured and inserted automatically as a watermark onto every page of the Documents and protects its copyright.
- **Supplementary Details:** a Project's Participants e.g. Client, Consultants, Mediator, Arbitrator, Contractor, Sub-contractors are captured only once and can be updated if necessary.
- **Database Storage:** of your company's Project Participants, so that you do not have to re-capture these details again if you wish to re-use these companies on another Project.
- **Update:** your Project Participants by inviting them by e-mail to update their info. directly into your company's database

#### Creating Documents

- **Purchase & Create:** create .pdf 'Project' & 'Reference' Documents. (Adobe Writer software is not required.)
- **Complete:** 'Project' Documents' on-screen, saving time and effort
- **Capture:** additional information manually into your Documents
- **Use:** built-in dropdown options for completion of Document fields
- **Save:** each Document online in a special Company Office Database
- **Replicate:** copy and import data from previously created Project Agreements, across Projects and/or to another Project Agreement
- **Collaborate:** electronically with third parties in remote offices to view, edit and print or view only, particular Project Documents
- **Track & Compare:** previous working revisions of a Document to see a history of changes
- **Insert electronic initials and signatures:** into Agreements in a very secure way and check this workflow
- **Finalize:** Documents to prevent further editing
- **Send:** Documents as an attachment to an e-mail address

#### Document Records

- **Store and list Agreements:** created for each specific Project, eliminating collection of hard-copy documents
- **Store and list Reference Documents:** for access by your 'Office Users'
- **Access:** 'Project Document Folder's across multiple Document Suites such as PROCSA, JBCC, CESA etc.
- **Download and save:** Agreements to the User's own workstation, if required
- **View an 'Archive Store':** of all previous Editions of the Agreements

#### Manage your company information within e-DOCX

- **Setup 'Office Users':** who are other Users in your office who can access your on-line library of Reference Documents
- **Setup an 'Office Administrator':** allowing them to purchase and complete Agreements for the company
- **Setup 'Project Administrators':** giving a member of a Project Team Document creation authority
- **Setup 'Document Collaborators':** set up people from other companies to assist in completion of Documents
- **Assign 'Document Collaborators:** to a specific Document either with View Only, or View and Edit access
- **Manage:** User logins and control access by different users within the same company office
- **Purchase credits:** by EFT or credit card, receiving notification when the credit balance is low
- **Access:** your created Company Documents at any time
- **Print:** the Documents as many times as required for a specific Project
- **Save:** the Project Document to your workstation at any stage
- **Search:** each Document by keyword

## Tendering

- **Choose** potential Tenderers, Tender using the Tendervault™ Service. Capture appointed Tenderer's information. Use the Documents created

## Electronic Signing

- Various options and choices are available as far as electronic signatures are concerned.
- [Click here](#) to read more on these options

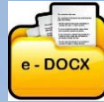


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**See below for Facility comparisons for the Basic Suite, Pro Suite and Pro Suite Premium**







## e-DOCX SYSTEM <sup>1 August 2022</sup>

### Basic Suite, Pro Suite and Pro Suite Premium Comparison of Facilities

	Basic Suite	Pro Suite	Pro Suite Premium Available to all PROCSA Pro Suite Users
<b>Registration</b>			
<ul style="list-style-type: none"> <li>Creation of a company account required</li> </ul>	X	✓	✓
<ul style="list-style-type: none"> <li>Username, password and login required</li> </ul>	X	✓	✓
<b>User Access</b>			
<ul style="list-style-type: none"> <li>Administrator permissions available</li> </ul>	X	✓	✓
<b>Company Status</b>			
<ul style="list-style-type: none"> <li>Company dashboard displaying User's Name, Designation, the names of the different 'Document Access Services', balance of 'Credits'</li> </ul>	X	✓	✓
<b>Company Office Account</b>			
<ul style="list-style-type: none"> <li>Company Office Reports               <ol style="list-style-type: none"> <li>Document Purchase Statement – by Company Office</li> <li>Document Purchase Statement – by Project (A List of your Company's Projects with links to the Documents created for those Projects)</li> <li>Document price list</li> <li>View List of Documents Purchased – by Project</li> <li>View List of Documents Purchased – by Document Suite</li> <li>Transaction History Report</li> </ol> </li> </ul>	X	✓	✓
<ul style="list-style-type: none"> <li>g. A list of all the Company Office's Users and their 'Roles' with an update facility</li> </ul>	X	X	✓
<b>Purchase Mechanism</b>			
<ul style="list-style-type: none"> <li>Purchase credits by credit card or instant eft, and deduct from credits balance each time a document is created</li> </ul>	X	✓	✓
<ul style="list-style-type: none"> <li>Purchase documents by credit card or eft, and select multiple documents at once</li> </ul>	✓	X	X
<ul style="list-style-type: none"> <li>Subscription by credit or debit card on a monthly basis</li> </ul>			✓
<b>Mandatory Software</b>			
<ul style="list-style-type: none"> <li>Browser compatibility and mandatory requirements</li> </ul>	X	✓	✓
<ul style="list-style-type: none"> <li>Adobe Acrobat Reader</li> </ul>	X	✓	✓
<ul style="list-style-type: none"> <li>Adobe Acrobat Writer</li> </ul>	X	X	X

<b>Capturing of Project Information to be inserted into Documents</b>			
<ul style="list-style-type: none"> <li>• <b>Mandatory Project Details:</b> the Project's name is captured and inserted automatically as a watermark onto every page</li> </ul>	✓	✓	✓
<ul style="list-style-type: none"> <li>• <b>Supplementary Details:</b> a Project's Participants e.g. Client, Consultants, Mediator, Arbitrator, Contractor, Sub-contractors are captured only once, can be updated, and are stored online</li> </ul>	✗	✓	✓
<ul style="list-style-type: none"> <li>• <b>Supplementary Details Invitation Facility:</b> Enables an invitation to the designated email address of the Organisations listed in the Supplementary Details section of the System, to save time in the population of these fields by updating their information directly into your company's database</li> </ul>	✗	✗	✓
<ul style="list-style-type: none"> <li>• <b>Database Storage:</b> Project Participants are sored online so that you do not have to re-capture these details again if you wish to re-use these companies details on another Project</li> </ul>	✗	✓	✓
<b>Creating Documents</b>			
<ul style="list-style-type: none"> <li>• <b>Purchase &amp; Create:</b> create .pdf 'Project' &amp; 'Reference' Documents</li> </ul>	✓	✓	✓
<ul style="list-style-type: none"> <li>• <b>Complete:</b> 'Project' Documents' on-screen, saving time and effort</li> </ul>	✓	✓	✓
<ul style="list-style-type: none"> <li>• <b>Capture:</b> additional information manually into your Documents</li> </ul>	✓	✓	✓
<ul style="list-style-type: none"> <li>• <b>Use:</b> built-in dropdown options for completion of Document fields</li> </ul>	✓	✓	✓
<ul style="list-style-type: none"> <li>• <b>Save:</b> each Document online in a special Company Office Database each Document offline in a special Company Office Database</li> </ul>	✗ ✓	✓ ✓	✓ ✓
<ul style="list-style-type: none"> <li>• <b>Replicate:</b> copy and import data from previously created Project Agreements, across Projects and/or to another Project Agreement</li> </ul>	✗	✗	✓
<ul style="list-style-type: none"> <li>• <b>Collaborate:</b> electronically with third parties in remote offices to view, edit and print or view only, particular Project Documents</li> </ul>	✗	✗	✓
<ul style="list-style-type: none"> <li>• <b>Track &amp; Compare:</b> previous working revisions of a Document to see a history of changes</li> </ul>	✗	✗	✓
<ul style="list-style-type: none"> <li>• <b>Electronic signatures:</b> sign electronically</li> </ul>	✓	✓	✓
<ul style="list-style-type: none"> <li>• <b>'Sign On-Demand' Service (Extra charges levied) :</b> enables the secure electronic initialing and signing of Agreements by Project signatories on a round robin basis. A further benefit being the merging of all related annexures in one combined document for initialing and signature. A full audit trail is included, and each signatory receives and electronic copy of the secured document for record purposes</li> </ul>	✗	✗	✓
<ul style="list-style-type: none"> <li>• <b>Finalize:</b> Documents to prevent further editing</li> </ul>	✗	✓	✓
<ul style="list-style-type: none"> <li>• <b>Send:</b> Documents as an attachment to an e-mail address</li> </ul>	✓	✓	✓
<b>Document Records</b>			
<ul style="list-style-type: none"> <li>• <b>Store and list Agreements:</b> created for each specific Project, eliminating collection of hard-copy documents</li> </ul>	✓	✓	✓
<ul style="list-style-type: none"> <li>• <b>Online Library for Staff:</b> create a library of Reference Documents for access by your Company staff members</li> </ul>	✗	✗	✓

<ul style="list-style-type: none"> <li>• <b>Access:</b> 'Project Document Folder's across multiple Document Suites such as PROCSA, JBCC, etc</li> </ul>	X	✓	✓
<ul style="list-style-type: none"> <li>• <b>Download and save:</b> Agreements to the User's own workstation, if required</li> </ul>	✓	✓	✓
<ul style="list-style-type: none"> <li>• <b>View an 'Archive Store':</b> of all previous Editions of the Agreements</li> </ul>	X	X	✓
<b>Manage your Company Information</b>			
<ul style="list-style-type: none"> <li>• <b>Setup 'Office Users':</b> who are other Users in your office who can access your on-line library of Reference Documents</li> </ul>	X	X	✓
<ul style="list-style-type: none"> <li>• <b>Setup an 'Office Administrator':</b> allowing them to purchase and complete Agreements for the company</li> </ul>	X	X	✓
<ul style="list-style-type: none"> <li>• <b>Setup 'Project Administrators':</b> giving a member of a Project Team Document creation authority</li> </ul>	X	X	✓
<ul style="list-style-type: none"> <li>• <b>Setup 'Document Collaborators':</b> set up people from other companies to assist in completion of Documents</li> </ul>	X	X	✓
<ul style="list-style-type: none"> <li>• <b>Assign 'Document Collaborators:</b> to a specific Document either with View Only, or View and Edit access</li> </ul>	X	X	✓
<ul style="list-style-type: none"> <li>• <b>Manage:</b> User logins and control access by different users within the same company office</li> </ul>	X	X	✓
<ul style="list-style-type: none"> <li>• <b>Purchase credits:</b> by instant EFT or credit card, providing notification when the credit balance is low</li> </ul>	X	✓	✓
<ul style="list-style-type: none"> <li>• <b>Access:</b> your created Company Documents at any time</li> </ul>	✓	✓	✓
<ul style="list-style-type: none"> <li>• <b>Print:</b> the Documents as many times as required for a specific Project</li> </ul>	✓	✓	✓
<ul style="list-style-type: none"> <li>• <b>Search:</b> each Document by keyword</li> </ul>	✓	✓	✓
<b>Other Premium Features</b>			
<ul style="list-style-type: none"> <li>• <b>FAQ's (Frequently Asked Questions):</b> This is a facility providing answers by experts, to 'Frequently Asked Questions' relative to the Agreements. Users can keyword search all Questions &amp; Answers by Agreement, Edition and Clause Number</li> </ul>	X	X	✓
<ul style="list-style-type: none"> <li>• <b>CPAP Indices &amp; Archives:</b> This facility provides your company with access to monthly CPAP Indices for fluctuating price contracts and also, to a historic record of past monthly CPAP Indices</li> </ul>	X	X	✓
<ul style="list-style-type: none"> <li>• <b>TenderVault:</b> Companies can provide time saving and secure online Tendering by use of this system, that now includes inclusion of our Tender-Vault Service for Subscribers to Pro Suite. Users can setup Tenders using preset workgroups whereby JBCC Contract Data Documents can be created for each Tenderer, using the copy feature across Documents. Users can setup their Project Tender Vaults. The system automatically sets up a set of Tender Folders for the Project</li> </ul>	X	X	✓

<p><b>Purchase of Agreement Bundles:</b> Purchase of JBCC Document Bundles that can be purchased for the larger Projects with numerous N/S Subcontractors, each requiring Subcontract Agreements and Contract Data Documents. Based on the size of the Bundle, prices reduce and therefor prides savings for the User. When a Document is created from a purchased Bundle, the reduced cost of the Document reduces the Bundle Balance until there are no more Documents left</p>	X	X	✓
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