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ABOUT THE PRO SUITE DOCUMENT ACCESS SERVICE 11 May 2020

**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.

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.



For further information

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