



The Standard in Project Management®

Management Information

The Management information module organizes a series of related projects into a single portfolio consisting of reports that capture project objectives, costs, timelines, accomplishments, resources, risk and other critical factors. Executives can then regularly review entire portfolios, spread resources appropriately and adjust project to produce the highest returns.

The module utilizes a drill capability through all the other modules. It provides the Client, Executive, and Management Level with readily accessible status information and easy data query capability.

Features:

- Generate summary reports across the projects
- Drill down capability through all the other modules up to the 3rd level in the Cost & Commitment
- Provide the real time data on overall view across all projects
- Create new project using a wizard
 - Select Company/Contacts
 - Select Templates from Standard or a particular project
 - Project Elements
 - Document Numbering Structure
 - WBS

Document Control

The Document Control module handles all document circulation. For outgoing documents, the system will automatically use the related Word template. It also logs and tracks all Contacts, including Clients, Contractors, Vendors, and Project personnel. Each document can have its own action items. It is very easy to handle distribution lists and true cross-references. The module handles documents such as Request For Information (RFI), Request For Proposal (RFP), Submittals, and Meeting Minutes. It has full search capabilities, including search by subject, document type, description, references, date ranges, keywords, and text from any field.

When Client/Owner and Prime use PMIV, but they do not want to share the common database, both databases are synchronized to minimize the re-handling of data, the copy and the scan operations.

Features:

- Define and Setup unlimited User Defined Document Numbering Structures
 - 9 Levels Structure
- Define and Setup User Defined Document Type
- User Defined unlimited MS Templates
- Update your Company/Contacts library
- Multiple References
- Multiple Cross-references
- Multiple 'cc' and 'bcc'
- Unlimited Distribution Lists
- File Categories
- Unlimited Keywords

- Attachments
- Actions with e-mail Notifications
- Action Status based on Due Date
- Void Documents capability
- Toggle between the Document and its Cross-references to view them on the screen
- All Correspondence-In are captured within the system, including the Attachments
- Manage "Response Required"
- Add any Document Attributes to the In-coming Documents
 - Cross-references
 - File Categories
 - Keywords
 - Actions
- All Correspondence-Out are generated within the system using MS Templates
- Add any Document Attributes to the Out-going Documents
 - Cross-references
 - File Categories
 - Keywords
 - Action
 - Attachments
- In-coming e-mails are captured within the system
- Sent e-mail directly from PMIV including Attachments
- Images/Pictures are integral part of the system
- Add any Document Attributes to a Picture or a group of Pictures
 - Work Breakdown Structure
 - File Categories
 - Keywords
 - Cross-references
- Draft capability
 - Create Draft Document
 - Action them for Review, Comments, ...
 - Cut & Paste Comments
 - Draft Revisions are being maintained
 - Generate the official document from any Draft Revision
- My Actions Status
 - Action Received
 - Action Sent
 - Action Responded
 - Check if an Action has been Open/Read
- Document Received automatic Log
 - User Defined Filtering
 - Date Ranges
 - Document Type
- Document Sent automatic Log
 - User Defined Filtering
 - Date Ranges
 - Document Type
- Request For Information (RFI)
 - Action
 - Responsible Engineer
 - Reviewers with Electronic Signature
 - Attachments
 - Items for Drawings
 - Discipline Reference
 - Special Provisions Reference
 - Standard Specification Reference
 - Due Dates and other Control Dates such as Contractual Date
 - Critical Path Information and Schedule Impact
 - Cost Impact
 - Import/Export Capabilities
 - Create RFI Revisions
- Submittal

- Action
 - Responsible Engineer
 - Attachments
 - Special Provisions Reference
 - Standard Specification Reference
 - Submittal Detail
 - Item Summary
 - Item Details with Drawing Attachments
 - Reviewers with Electronic Signature
 - Control Multiple Reviewers
 - Import/Export Capabilities
 - Create Submittal Revisions
 - Automatic creation of Submittal from Designer Input
 - Automatic update of the Drawing Libraries
 - Control various Status including the Superseded automatically
- Transmittal
 - Action
 - Responsible Engineer
 - Attachments
 - Special Provisions Reference
 - Standard Specification Reference
 - Transmittal Detail
 - Item Summary
 - Item Details with Drawing Attachments
 - Reviewers with Electronic Signature
 - Import/Export Capabilities
- Meeting Minutes
 - Setup Meeting Type and Item Category/topic
 - Meeting Information
 - Agenda
 - Attendees
 - Attachments
 - Meeting Minutes items by category/topic
 - Due date per item
 - Multiple Actions by item
 - Responsibility by item
 - Duplicate function when adding new Meeting Minutes
 - Unresolved items are moved to the new Meeting Minutes maintaining their original Meeting Minutes number and item number
 - Various reports from summary to detail
- Daily Reports (various types)
 - For Field Office
 - Daily work description
 - To Do List with Due Date, Status, Percent Complete
 - Activity and Issue description with Keywords and Time recording
 - For Inspector – Daily Diary, also available on Pocket PC with voice recording
 - Weather condition
 - Daily work description for each Contractor
 - Track Labor
 - Track Material
 - Track Equipment
 - Track Others
 - Embedded Pictures
 - Status of each observation
- Telephone Calls
 - Record the telephone conversation
 - Action
- Safety
 - General Information
 - Case Number
 - Type and category of accident

- Status of the accident
 - Location, Date and time
 - Employee Information
 - Name and address
 - Physician information
 - Accident detail description
 - Accident Investigation Information
 - Safety code regulation
 - Safety Jurisdiction
 - Responsibility
 - Reference
 - Witnesses
 - Actions for Prevention
- Change Order Package
 - List all drawings contain in a Change Order
 - Update automatically the Drawing Libraries
 - Cross-reference between drawings and Change Orders
- Drawing Libraries
 - Plan Sheets Library
 - Shop Drawings Library
 - Latest Drawing Revisions
 - Drawing Revisions History
 - WBS and other attributes at the drawing level
 - All the Drawings can be viewed on the screen
 - Add-on Viewers
 - Red-lining capability
- Search
 - Full search capability
 - Any field or combination of fields
 - Date Ranges
 - Keywords
- File Category Search
 - Electronic File Cabinet
 - Indication if the Document was archived, where, when and by who
 - Tracking the Original Document
- Tree View Search
 - Based on the WBS
 - Plan Sheets Tree View
 - Shop Drawings Tree View
 - The latest drawing revisions for a work activity
- Reports
 - Various predefined Reports in the system
 - Various predefined Logs in the system
 - Easy to use Report Wizard Interface
 - Report can be grouped, sorted and filtered by User
 - Filters can be save in a library for future use
 - Statistical Reports
- Utilities
 - Submittal Item Status Codes
 - Contractual review days for various document types
 - User Defined Checkbox Labels
 - Reference Validations
 - Keyword Library
 - Default Element values
 - DC System Variables
 - Action Assign and Action Taken Automatic to speed up the input

Flexible approach:

Our unique flexible approach to Project Management is reflected in our Solutions specifications. Our Solutions can be adapted to Client needs and requirements.

As an example, in the case of the use of our Document Management System in the San Francisco Oakland Bay Bridge projects by the California Department of Transportation:

- The servers, after final approved specifications by the Client are purchased, supplied and installed at the Client and Prime sites respectively.
- The databases are independent but synchronized, hence defining and securing the ownership of the information, minimizing the scanning operations and making the shared documents such as correspondence in and out secure and searchable.
- All project documents are captured and generated within the system.
- User defined document numbering structure up to 9 levels.
- All documents and attachments, including drawings are viewable on the user's screen.
- User defined document types with MS Word Templates.
- The system allows attributes for each document:
 - Multiple references
 - Multiple Cross-references
 - Multiple "cc" and "bcc"
 - Unlimited distribution lists
 - File categories
 - Unlimited Keywords
 - Attachments
 - Actions with email notifications
 - Void documents
- Toggle between the Document and its Cross-references with view capability on the screen.
- Action status including "My Actions".
- Project Images/Pictures integrated part of the system with attributes and search capability.
- Draft capability including "My Draft".
- Documents Received and Sent automatic logs with hyperlinks.
- Request For Information with "Responsible Engineer", "Reviewers", "Special Provisions" and "Standard Specifications" references.
- Submittal with "Responsible Engineer", "Reviewers", "Special Provisions" and "Standard Specifications" references. Automatic creation of Submittals from the Designer input with automatic update of the Drawing Libraries.
- Meeting Minutes categorized by topic and items with Actions and Responsibility by item. Duplicate functions.
- Various Daily Report Types for Field office personnel and Inspector.
- Telephone Calls captured with actions.
- Safety Report with "General", "Employee" and "Accident" information.
- Change Order Package with drawings, automatic update of Drawing Libraries and Cross-reference between drawings and change orders.
- Maintaining history of all drawing revisions with attributes including automatic superseded drawings.
- Elaborate and full search capabilities including date ranges and any fields or combination of fields.
- File Category search with tracking of original documents.
- Electronic file cabinet for all project documents based on File Category.
- Graphical representation of the project by WBS and all related latest drawing revisions.
- Various logs and reports with filters.
- Record Management during the life of the project minimizing the number of file cabinets in the project office.

Integral Vision is involved in the Toll Bridge Seismic Retrofit Program since 1998.

Record Management

The Records Management module establishes the lifecycle management of all physical and electronic documents, such as business transaction, emails and scanned images from creation to ultimate disposition.

It uses electronic system to track physical files. It deploys a group based user security model with strict filing permissions for groups of users.

Features:

- User defined record plan. The record plan includes what needs to be kept as a record, where is the place and for how long.
- Integrated with PMIV document control module. Easy user enter interface for archiving and retrieving the documents.
- Originals are identified and tracked
- Check In/Check Out feature during the archiving process.
- User defined disposition schedules for each document type to make sure that all the records are destroyed according to your procedures.
- Advanced security functionality to manage security on group level/user level.
- Various reports to show where records are in their lifecycle, which records should be reviewed and which records are eligible for transfer, accession and destruction.
- All system activity is logged, providing an audit trail that tracks the entire lifecycle.
- Easy visual identification of which document has been archived and where.