SYNCADE™
Smart Operations Management Suite

Reduce paper-based errors

The Syncade Document Management Application eliminates the need for paper-based documentation. It enables quick, easy access to electronic information - when it is needed, where it is needed. It facilitates collaboration and provides automatic document routing for review and approvals. The Document Management Application greatly decreasing the time needed to change and approve documents. This solution increases productivity, helps ensure current and effective documents are being used, and reduces paper costs.

EXAMPLE PAPER-BASED DOCUMENTS

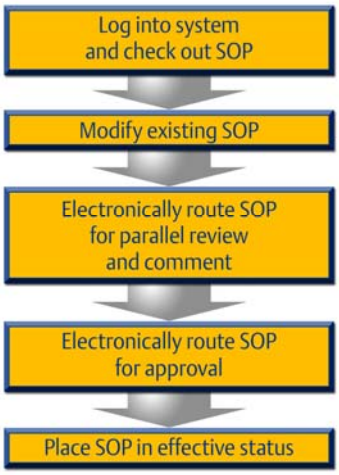
Documentation is a necessity of effective operations and includes many types of documents in various formats for different audiences; such as operations, maintenance, engineering, quality, and management. These documents include a wide array of information, such as design, testing, recipes, P&IDs, SOPs, MSDS. The development and change management of documentation can be overwhelming. Changing an SOP may include steps - as detailed in the scenario to the left. This process is inefficient and can lead to inadvertently having obsolete documents being used during process operations.

The Document Management Application addresses the complete document lifecycle, including online document storage, single- and multi-document change control, automatic routing, document check-in and check-out, version management, archived records management, and printing. Additionally, the change management system offers flexibility with highly configurable change request workflows, including a conditional review option, serial and parallel review and approval, role and user-specific assignment feature, and delegation management of review and approval assignments.

Periodic and obsolescence review workflows take the aggravation out of annual document review and document retirement.

With Document Management Application, the scenario below is effective and streamlined to improve productivity.

EXAMPLE ELECTRONIC DOCUMENT



EMERSON.
Process Management

Pre-engineered software configuration reduces engineering

Syncade Document Management Application provides pre-defined document management configuration to allow you to quickly transition to electronic documents. This configuration can be modified to fit the unique requirements of your facility and helps reduce engineering and testing efforts by enabling you to build upon Emerson's data management expertise. The Document Management Application includes preconfigured software that defines repositories, document libraries, security groups, change control workflow, and reports to enable you to optimize resources by streamlining documentation.

Document organization enables quick setup

Document repository. Pre-defined repositories have been setup to help organize your documents.

Document library. To further help with organization, document libraries have been defined. Each document type includes pre-configured metadata.

Repository	Document Library	Properties
Production	SOPs	Author, Owner, Periodic Reviewer, Type, Cover Page, Department , System
	MBR	Author, Owner, Periodic Reviewer, Type, Cover Page, Department , Product
	Validation	Author, Owner, Periodic Reviewer, Type, Cover Page, Department , System, Validation Type

Pre-defined change control workflows speeds review and approval

Change Requests. Three change request workflows have been pre-defined: Make Effective, Periodic Review, and Obsolescence. Each workflow includes user roles, required review periods, and email notification messages.

Change Request Workflow	User Roles	Review Period
Make Effective	Manufacturing, Document Control, QA	7 days each Role
Periodic Review	Manufacturing, Document Control, QA	7 days each Role
Obsolescence	Manufacturing, QA	7 days each Role

Pre-defined configuration allows you to build on our expertise

Security User Groups. Four "typical" user groups have been pre-defined: System Administrator, User Administrator, Supervisor, and Change Request Reviewer. Each user group has been assigned permissions appropriate for their role.

Security / User Groups	Description
System Administrator	Access to all application administration settings and configuration. Access to User Account creation and management
Document User	Access to all Effective Documents
Document Controller	Access to Change Control routing and Approval and document editing
Change Request Approver	Access to Approve and comment on proposed operations document changes
Change Request Reviewer	Access to review and comment on proposed operations document changes

Data integration for easy data access

Web Portal web parts. For easy access to review and approval tasks from any device on the network, web parts displaying important information is pre-defined.

Document Kiosk. Operators can gain easy access to Effective Document from any network or handheld device.

Web part	Description
Change Request Search	Provides the ability to search all CRs based on CR properties.
Change Request Summary	Provides a graphical representation of Change Request by status. Further breakdown is provided by Status.
Change Requests that Need My Attention	Provides a listing of hyperlinks to Change Request that need attention by the current logged in User.
Change Requests Approvals by Month	Provides a graphical representation of CR approvals by month
Document Browser	Provides a quick search and view of Effective documents by browsing the repository
Document Quick Search	Provides a quick search dialog to search and view for documents across repositories.
Documents by Status	Provides an overview of documents by status
Documents that I Subscribe to	Provides a subscription list of commonly used documents by user.
User Approval	Provides a graphical view of planned vs. actual approval time by user.
User Review	Provides a graphical view of planned vs. actual review time by user.

Comprehensive reports support compliance

Reports. Pre-defined Crystal reports provide complete audit trail history, as well as equipment definitions, such as classes, lists, and details. Additionally, reports have been defined to detail use and access to the equipment.

Reports	Description
Current Effective Documents	Provides a listing of all Current Effective documents.
Documents in Change Control	Provides a listing of Documents currently under Change Management
Documents Pending Periodic Review	Provides a listing of documents for periodic Review
Administration Settings	Provides a listing of current Administration settings
User Accounts	Provides a listing of all User accounts and user account access.

Documentation delivered to support validation efforts

Project Management Plan. This document outlines the process and methodology used to develop the configuration.

Schedule. A pre-defined schedule of the tasks required to implement the solution is provided.

Functional Specifications. The functional specifications used to generate the Document Management configuration are provided.

Detailed Design Specifications. The design specifications used to generate the Document Management configuration is provided

Executed Test Procedures. The test plans used to verify the Document Management configuration functionality is provided.

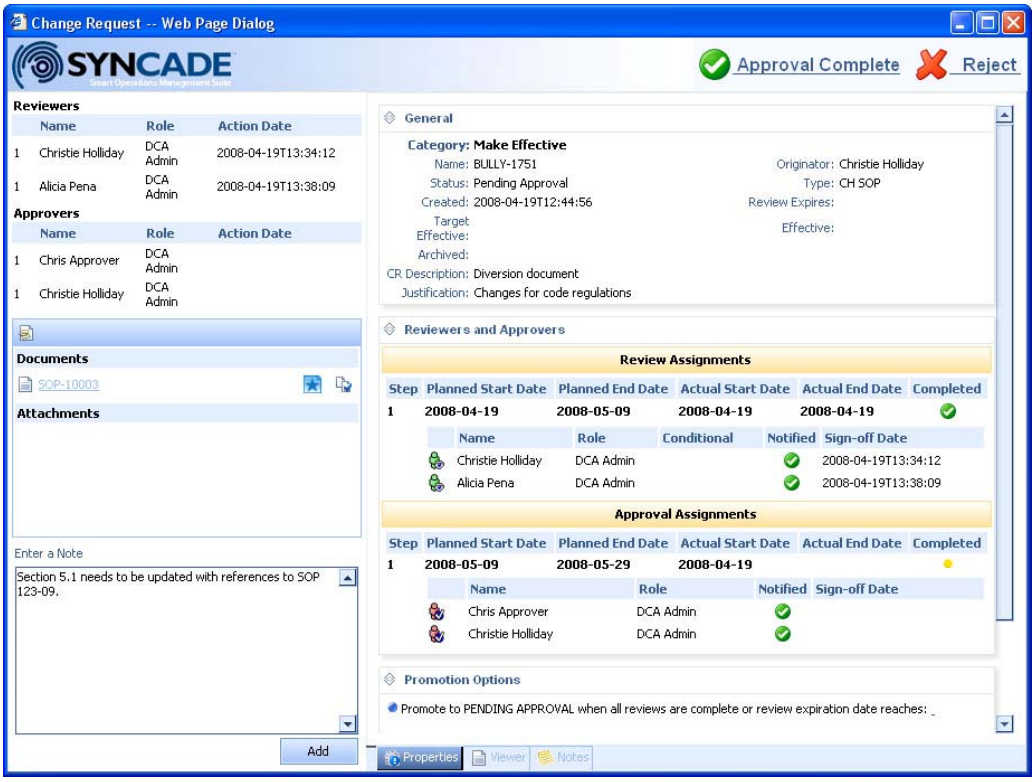
Services provided

Software Installation. The installation of Document Control & Archiving and Security & Audit software modules, as well as SQL Server 2008 is provided.

Document Import. The loading of Document Management Application configuration is provided.

User Account Import. The loading of user accounts from the MS Active Directory is provided.

Consulting. 40 hours of consulting services is provided to help ensure that the end user gains operational benefit from this solution.



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Syncade Document Management solution saves time and improves productivity.

Syncade Document Management Application bundles software and services to comprehensively address the management of electronic documents. This solution includes several components:

Document Control & Archiving (DCA) Software Module

Document Control & Archiving (DCA) solution is a document management system for storing documents, such as electronic work instructions, electronic batch records, formulations, material safety data sheets, and SOPs. With DCA, users can quickly find and instantly access the documents they need. DCA also makes the document review and approval process easy and efficient. Time spent on document and change request management, as well as the subsequent review and approval cycles, is dramatically reduced.

Security & Audit (SA) Software Module

Security and Audit provides controls for individual or multiple Compliance Suite applications to be used in a 21CFR Part 11-compliant manner. It provides complete security services, such as user authentication, electronic signature and transaction activity control that must be logged to an audit trail.

Document Management Application

The pre-configured application templates provide a quick start to helping you effectively use electronic documentation. This pre-engineered software can be modified to fit the unique requirements of your particular project. These configuration templates reduce engineering and testing efforts by enabling you to build upon Emerson's process expertise. The Document Management application includes preconfigured software, security user groups, test protocols, pre-defined web parts, as well as software installation and loading.

Consulting Services

40 hours of consulting services is provided with each Document Management solution. This service will help end users evaluate their requirements and identify quantified business results to be achieved.

First Year Maintenance

One year of SureService is provided.

To locate a sales office near you, visit our website at: www.EmersonProcess.com/Syncade
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