

# ***PROFF Records and Document Information Management System*** ***A cloud based solution to manage corporate knowledge***



**PROFF IM SOLUTIONS Inc.** provider of **PROFF RDIMS Information Management System**, a comprehensive modern solution recognized for its feature-rich records and document management functions, it's simple yet powerful administrative functions and an easy to learn user interface which promotes enterprise-wide adoption in client server and web environment. In addition to our product being amongst the best, our clients and partners will attest that our support is second to none. Experience the power of PROFF Records Manager an efficient cost effective solution for your organization.

## **PROFF Business Suite**

- Records Management
- Retention Management
- Disposition Management
- Circulation Management
- Document Management
- Correspondence Management
- Record Centre Management
- Box Management
- Print Bar codes

## **PROFF X Interfaces**

- Direct interfaces for E-documents
- MS outlook E-Mail Interface
- Windows Explore interface
- MS Word and EXCEL Interface
- Projects, Legacy and tombstone Application Interfaces

## **Market Sectors**

- Federal departments
- Crown corporations
- Law offices (Legal sector)
- Municipalities
- Campuses and colleges
- School Boards
- Insurance
- Private sector

## ***Records Management***

Support subject classification as well as project business function plans and guides in the same system structure. Interface with tombstone applications to automate file creation process.

Apply retention to primary level record series that will automatically inherit throughout the subsequent record series. Defined retention based on an event such as after fiscal year end, current year end, legal review, etc...

Assign subject classification and project business function classification guides to individual departments.

Define access level security for end user, organization, sector and departments as well as records series, folders, volumes, documents and boxes.

Automate creation of default volume with disposition date and barcodes when creating new record series for departments.

Avoid navigation through project classification guide by creating work files as favorite files for ease of use for the end user.

User friendly interface to view all relevant information such as records series, files, volumes, boxes and documents.

Powerful search function including key words and wild card search to find record series, files and documents.

Generate reports on results sets.

Print or save project classification guide for the relevant departments in PDF format.

Circulate files and volumes to end user and keep track of the circulation history. Check-out, Check-in and file transfers.

More than 50 standard reports for Records management activities. **And more...**

*Experience the Power of  
**PROFF!***



### **Professional Services**

- Project Classification Guide setup
- Special Customization and interfaces to Legacy systems
- Record Manager WEB services
- 24X7 support
- Data conversion from other systems

### **Configuration**

*Application Interface:*  
Business Suite Web version  
Business Suite Client server version  
Business Suite Web Services

### **Data Base Support**

ORACLE 9i, 10, 11g  
MS SQL Server 2005, 2008  
INFORMIX, Sybase SQL Server

### **Windows OS**

WIN 7,8,10, Windows Server  
2008, 2013



**PROFF IM Solutions Inc.**

## ***Documents Management***

Organize and maintain paper and electronic documents in any format using PROFF Records Manager. Define storage methods to save electronic documents in the database or in a shared protected folder structure.

Use PROFF-X Direct interface to capture and save electronic documents through MS WORD, OUTLOOK, Windows Explore and other scanning devices.

Store documents in the database or external folder in shared network drive. View documents in native format.

Documents also will inherit the same disposition date from the volume.

All properties in the document profile are searchable. Define security access levels for documents and restrict access to unauthorized users.

Document management provides version control. Maintain different versions of modified document.

Search documents using keywords and wildcard characters. Define annotations, citations, references and related documents to the master document. **And more...**

## ***Docket Management for Correspondence tracking and workflows***

Create work flows using docket management functions. Create color coded urgent, 7 day, 14 day, 30 day dockets and circulate among users or groups for action. Maintain all work documents in the docket and in completion put-away the docket to the filing system. Maintain docket with paper and electronic documents and track action and comments from the end user and other user groups. Track and maintain the circulation workflow history of a docket, action taken, action required by the user or a group. In completion close the docket and put-away to the main record series classification.

Generate standard reports and statistical reports for past due, acknowledgements, action taken etc... **And more...**

## ***Disposition Management and Box maintenance***

Generate disposition list and circulate to the departments for authorization and approval of disposition. Allow individual departments to dispose files. Use record centre functionality to maintain and track boxes. Scan disposed files into boxes and track box movements to archival and storage centres.

Create automatic disposition dates for boxes based on the inactive retention cycle. Sent boxes to archival, Storage Company or dormant area and maintain the box numbers and accession numbers. Manage and maintain circulation of boxes.

## RDIMS Business Solutions

Records  
Manager

Document  
Manager

Workflow  
Manager

Record Centre  
Box Manager

## RDIMS Business Architecture

Client Server  
Solution

WEB Server  
Solution

WEB Services  
from PROFF

Professional  
Services

PROFF-X  
interfaces

## RDIMS Business Functions

Maintain Project Classification Guide and Subject Classification Guide in the same system.  
 Maintain Record Series with retention module for better disposition cycle of records and documents .  
 Maintain either classifications structure for individual departments with own retention module. Manage work files as favourite files.  
 File and Volume management with barcodes  
 Circulation Management Check-out, Direct check-outs, Reserve request, Check-in and file transfer functions  
 Disposition process for files and documents  
 Generate pre-disposition reports.  
 Create and Maintain boxes and transfer to record centres and archival storage. Manage accession numbers  
 Maintain functional level security for user access. Apply security for all modules including, organization levels, record series, file, volumes and documents.

Manage electronic and paper documents.  
 Direct interfaces to file plans and business classification guides for effective and easy filling methods  
 Maintain version control for documents  
 Maintain related documents to the master document. Create citations and annotations for the work documents.  
 PROFF-x Direct interfaces to MS outlook to save emails and attachments.  
 PROFF-x direct interface to tombstone applications to automate the creation of work files.  
 Manage work-flows and maintain and track correspondence circulation and history.  
 Maintain access security for record series, files and documents.  
 Powerful search functions including key words and wild card searches.  
 More than 50 standard reports  
 Fully bilingual, English plus any other language.

Since 1997 PROFF has provided various IM solutions and services to the government, crown corporations and private sectors. With latest state-of-art techniques, PROFF provides unique cost effective solutions and services to manage corporate knowledge of Records and Documents.