

Dear Customer,

This is the third of a series of newsletters we plan to send to you with brief case histories, tips and news about CCI and our products. I hope you will find these useful.

In this issue we've changed the masthead to say SuiteProducts rather than Suite-Factory to make the point that many of our products are not only for the shop floor but are applicable in any department or industry.

If you have any comments or suggestions please contact me.

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It's Audit Time ...

Do you know where your documents are?

Do you know where your records are?

We know where ours are!

Do you know where they have been

...and with whom?

We know where ours have been and who they were with!

You will too ...

If you use CCI's SuiteDocs™ with Records Management.

SuiteDocs is not only a Document Management Application (DMA). When activity logging is enabled it is also a Records Management Application (RMA) as defined by DoD 5015.2-STD and ISO 15489.

What is the difference between document management and records management? A Document Management Application gives you a place to store your important papers and a quick way to retrieve and view them. It might include a way to manage approvals and subsequent changes for engineering and manufacturing documents. It does not necessarily tell you how they got there or what happened to them along the way.

Records Management software keeps track of a document from its birth to its final disposition. It tracks who, what, where, when and why.

More and more government regulatory requirements for both its own agencies and private business demand that records be managed with traceability and security. Also from the standpoint of in-house procedures to meet self-imposed quality standards such as ISO 9000 it is necessary to have a robust system for storing, managing, retrieving and tracing the history of documents and records from creation to archival.

By the way – What is a record?

International Standard ISO 15489-1 "Information and Documentation – Records Management" Part 1 Paragraph 3.15 defines a record simply as

"information created, received, and maintained as evidence and information by an organization or person, in pursuance of legal obligations or in the transaction of business."

That's pretty broad. You want something more descriptive?

The U.S Federal Government, according to Section 3301 of title 44, United States Code "Records include all books, papers, maps, photographs, machine readable materials, or other documentary materials, regardless of

physical form or characteristics, made or received by an agency of the United States Government under Federal law or in connection with the transaction of public business and preserved or appropriate for preservation by that agency or its legitimate successor as evidence of the organization, functions, policies, decisions, procedures, operations, or other activities of the Government or because of the informational value of data in them. ...”

Hmm... machine readable materials. Does that include email? Yes it does. Saving email as bona fide business records is now a requirement in many businesses and government agencies. SuiteDocs can help you meet that requirement.

How does SuiteDocs™ work?

First Setup Document Management

Create your Filing system

SuiteDocs enables you to create an electronic filing system. File cabinets can be created by any user to whom the right is given by the system administrator. Access to any one file cabinet is controlled by user group assignments.

Search Criteria (This subject was discussed in our May Vol 1 Num 1 issue)
SuiteDocs enables you to create your own database fields for key words and any other item for use with the search engine. You can find your documents using criteria that make sense in your industry or profession.

Version Configuration

Setup automatic version control. You can allow multiple versions of a document to be available or enforce that only the latest versions exist. Earlier versions get archived automatically in the SuiteDocs archive database for later retrieval if necessary.

Approval and Sign Off

Documents can be marked approved by those who have the right to do so. Sign-off can be by one person or by several people in a certain order if desired. Final approval and Un-approval can be set up to occur at future dates and times.

Turn on Activity Logging

By enabling the activity logging function along with its built-in reporting feature, SuiteDocs becomes a full-fledged Records Management Application. For any document in the system you will now be able to trace its life history from conception to final disposition.

Details of the above can be found at www.suitedocs.com which includes a link to our full web based SuiteFactory Manual which covers all aspects of setup and use.

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