SmartDoc™

Managing and Enforcing SOPs Across Your Business

Pilgrim Software®
Enterprise Risk, Compliance & Quality Management

SmartDoc™ is a web-based solution that helps you cost-effectively create, manage and share critical documents and best practices throughout your entire enterprise. SmartDoc integrates document management into your value chain – ensuring fast, secure access to information. SmartDoc provides creation, versioning, approval, change, training and review processes in a single tool, providing a solid framework to meet industry and regulatory requirements.

Enforce SOP Training

SmartDoc goes beyond traditional document management by enforcing employee and manager responsibility. When new documents and SOPs are issued, employees must electronically sign-off to acknowledge that they have read the new information. Managers must then sign-off to provide assurance that their employees understand and follow company procedures.

Enhanced Productivity

SmartDoc eliminates silos of disconnected information to create a collaborative environment where knowledge can be shared easily. By connecting people, processes and data, SmartDoc helps you improve organizational effectiveness, agility and competitiveness. A wide-range of search options makes finding the right document fast and simple. SmartDoc's Things-to-Do list (portal page), along with email notification, helps employees keep track of work items and newly published documents. This helps you reduce non-value added time required to create, manage and find documents.

Organized Document Vault

SmartDoc is designed for easy navigation, rapid access, and functional viewing of single or multiple documents. Documents are presented in document repositories which organize content in a folder directory view for ease of navigation. In addition, users can view or check out/in documents directly from the document repository without having to open the specific document record.

Accelerated Document Review Cycles

SmartDoc helps you quickly put documents to use in your organization. Document templates and automated workflows shorten the time it takes to create documents, route them for approval and make revisions. When bottlenecks occur, SmartDoc's escalation capabilities re-direct work to ensure that tasks are completed on time.

In addition, SmartDoc's document collaboration tool assists document owners and reviewers in collaborating on Microsoft Office documents in SmartDoc during the document review process where all changes are saved directly in the database.

Manage Change

With document review schedules, review workflows and change notification capabilities, SmartDoc ensures that the most accurate, up-to-date information is available on demand. This helps you to enforce SOPs by providing employees with instant access to the latest revisions.

Security and Regulatory Requirements

With role-based document securities, powerful password authentication, and a complete audit trail, SmartDoc helps you facilitate IT and industry compliance with requirements for electronic signature and electronic records. SmartDoc can be used for internal, industry standards and requirements from various government regulations.

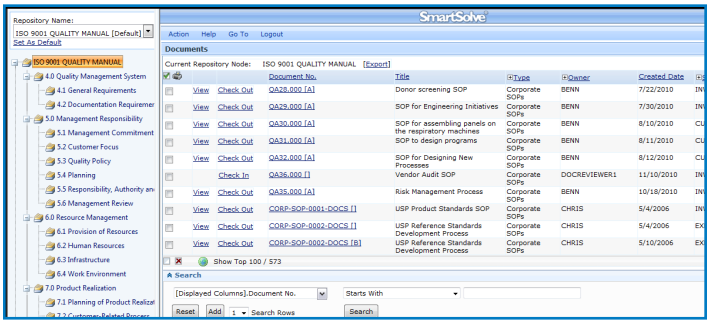
Visibility Throughout Your Value Chain

SmartDoc provides powerful, customizable reporting capabilities. You can easily create critical reports such as approval cycle times, time-to-close-out on changes, and master document reports to help you align to company KPIs and monitor the progress and status of your documents.

The Integrated Compliance Platform

SmartDoc is a fully-integrated part of Pilgrim Software's Enterprise Compliance and Quality Platform. Pilgrim Software provides an enterprise–wide solution for managing corrective and preventive actions, complaint handling, internal and external audits, document control, SOP enforcement, employee certification and training, equipment/calibration and supplier quality management. This powerful solution enables you to manage quality and compliance across your entire business, helping you meet industry and regulatory requirements, increase efficiency and reduce costs.

Document Repository



Document Profile

CAPABILITIES	BENEFITS
Improved Productivity	
Automatic PDF Rendering	Reduce file sizes and eliminate the need for native applications on every desktop.
Document Search	Rapidly find the documents you need using a variety of search capabilities.
Cross Referencing	Gain instant access to related documents and procedures.
Things-to-Do List	Keep your entire organization up-to-date on tasks and work items needing attention.
Recent Documents	Gain fast access to documents you use on a frequent basis.
Manage Change	
Check-in/Check-out	Preserve document integrity by allowing only one authorized user at a time to revise documents.
Document Review Cycle	Schedule regular document reviews to keep information accurate and current.
Revision Tracking	Track changes made to documents over time and obsolete out-of-date materials.
Change Orders	Reduce processing time by managing multiple change requests with a single change order.
Retention and Expiration	Ensure that information is always accurate and current by setting up retention and expiration rules.
SOP Enforcement & Management	
Policy Management	Enforce corporate standards by enabling sites to inherit corporate policies and workflows.
Employee Sign-off on Documents	Ensure that employees read and acknowledge new and revised documents and SOPs.
Manager Sign-off on Employee Training	Ensure that employees understand the latest policies and procedures.
Accelerated Processes	
Document Templates	Eliminate manual data entry with pre-defined values for a specific type of document.
Review & Approval Models	Establish enterprise-wide models for document review and approval to promote consistency.
Electronic Approval	Track training costs on an individual and per class basis to facilitate ROI.
E-mail Notification	Provide immediate notification about document releases and work items.
Escalation	Eliminate bottlenecks by automatically elevating incomplete tasks.
Collaboration	Ensures a secure, structured, and controlled review environment.

Advanced Technology

- Built on industry-leading Microsoft .NET and XML Technology
- Portal page provides users with a single entry page with personalized reports, tasks and documents
- Fully Web-based with no client-side code to ensure fast deployment, global access, easy server-level validation
  and a low cost of ownership
- Highly scalable solution capable of meeting your enterprise's expanding needs
- Multi-organizational, role-based security ensures that only authorized users have access to your corporate data
- Provides multi-language capabilities, universal date/time
  and other culture-sensitive options for global operations
- Leverages Web Services to integrate with cornerstone applications such as PDM, ERP, MES and HR to ensure
  bi-directional data integrity
- Highly configurable to meet a wide variety of business needs
- Extensible to allow modifications to the user interface, build
  new functionality, extend the database and integrate with
  other business systems

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