

Office Management(OM):

OM is an Enterprise Information and Communication Management System Framework, which has multiple applications, right from managing and controlling information flow, to managing tasks, projects and clients.

The Need:

Use of Information system for managing business is very common today. You will find any organization having at least a finance/ accounts management solution. More mature the organization gets, the more advanced software solutions are needed and are used. People use Finance, Inventory, assets, budget, customer management solutions, and solutions are available under names like ERP, CRM etc. What about the most vital aspect of business? The information management ... this part is seriously lacking.

Information consists of various things ...

1. Organization information
2. Info on people in the organization
3. People/ entities connected to organization, like clients, vendors, suppliers, advisors, investors etc.
4. Most vital is **Communication between these all.**
5. Information on the business/ Projects
6. Different views of this information for different entities. The same information, the same project as seen by different entities, would be with different focus. The client wishes to see if project is progressing well, and in time. The project manager may have his focus on micro-management of project, and allocation of tasks. An individual performer may be interested in his module and the issues related to the same.
7. Documents on projects and various tasks, and other important files.

Case Scenario: You have a business ... number of offices to conduct the same. Different departments, different roles, distributed staff. You have clients, and clients have projects. There are different managers handling different users from client side, interacting with different users from your teams. Some are using phone, some info is in documents, some information goes via email, Then there are issues in the project, and the client is agitated. The staff reports that things are normal, and this is not justified. Issues get allocated to some team members. They are independently struggling with them. They continue for a month, and after doing so, the client finds that this is not what he was talking about! Then someone is absent. Emails were sent to him, and info needs now to be transferred to someone else. There is such a huge confusion, in this un-managed

flow of business, no control and total chaos. This is the perfect combination for low efficiency and customer dissatisfaction.

There are various players in this story, and all may be trying their sincere best,

but are failing to coordinate, filter information, control situation, and on top of this, there are spam and security hassles!

There is a great need, to handle the communication, information, progress, with a proper control, and with intelligence built in to allow the information to be seen in multiple view points, and levels of transparency. Something which is very flexible, and still binds and controls the whole process.

Mechsoft,s OM gives exactly this solution. The flexibility comes from the rule engine, which works within the information management framework, and defines the rules of flow, visibility and security of the information. This framework comes ready with the following main modules, that can be enhanced, and added to, as per requirements. The modules are ...

1. Organization information
2. Project Management
3. Issue tracking
4. Document Vault
5. Discussion and communication manager
6. Scheduling
7. Rule engine to set rules on flow of information, and controlling.

OM Features:

Organization Information:

Application starts with setting up of your organization information, which is

1. Physical locations/ offices/ factories
2. Various departments: attached to each of these offices
3. Roles in the organization
4. Human Resource information, their roles and hierarchy and reporting structure
5. User Management: All entities associated with the organization are users, whether employees, management, investors, vendors, suppliers, associates/ marketing associations, partners, clients etc. Each of these are user types in OM.
6. Human Resources/ Users information: Profiles of individuals, and their skills, primary and secondary roles, and a track of any changes in their profile (or progress). This unit can be used to manage all incidents associated with the individual. This is very useful in tracking

- a. Employee progress, evaluation and skills tracking.
- b. Client management
- c. Vendor/ supplier external users performance tracking.

Discussion and communication manager

This module manages all communication, like messages, discussions, defining scope of work, changes to the scope, appreciations and disapprovals.

Communications on business topics happen between clients and management, clients and team, team manager to team members, and among team members.

Discussion module manages all this information. Some key features are ...

1. Starting discussions: You can start multiple discussions, and for each discussion select members.
2. Searching through various discussions where you are participant (or you have rights) for information.
3. Taking Discussion Live: The discussion will go live when the users mutually decide that they need to go interactive. This will be like a chat, though the chat text gets stored as a part of discussion, and attachments also get added to vault.
4. Applying rules for security/ filtering/ access control on the discussions.
5. Take back your words: You can take back some of the discussion, in case it has not already been received by anyone.

Project Management: 3D view and control of projects

OM manages clients, and projects from clients. Information exchange between organization and clients, generates Projects, which in turn gives rise to a team on the project with roles and responsibilities, deadlines, and project tracking.

OM has a multi dimensional view and control of the Project.

This tool is basically a pre-built rules in the framework to give you a project management solution. The views and abilities of actions for each kind of user can be different as defined by the admin, and the client may have access to the project progress, to the level that the organization decides to give.

Features of 3D Project View are:

1. Creation of Project, with defining project scope, defining expected timeline
2. Team and team lead allocation, allocation of roles to all players in the project
3. Defining view limits: Configuring who can have access to what information
4. Client View: Client will have an access to the project progress to the level set by the Admin, or the project leader. You can limit this access to having access to all information including internal communication, details of individuals working and their micro-level progress, or can be limited to only the necessary parts, like project communication with the team, issues created by the client etc. By default the client will have access to the following minimum features...

- a. Discussions: participating in discussions, creation of new
 - b. discussion, private discussions with selection of members of the project team.
 - c. Document vault: Uploading documents with comments, and defining who can view, and ability to view documents/ files that he has been granted an access.
 - d. Issue tracker: Creation of issue, and generating discussion on issues.
5. Project Lead's view: Project lead has a view of all the team's tasks, ability to create and allocate tasks, subtasks, editing/ reallocating tasks etc. Lead also has ability to initiate a task with respect to an issue.
 6. Team Member's View: Team member would typically check his tasks, participate in discussions, view files meant for him, and update and report on his tasks and work schedule.
7. Change management: Defining change, scope, and accordingly correcting timeline and scope of the project.

Issue Tracker:

In all tasks that we plan, projects that are done, when things do not happen as planned, an issue gets generated. Issues can be created by anyone related to the project. This gives complete cycle of issue management, right from creation of issue, tracking issue, to closing the issue.

Document Vault:

Document vault is a shared documents space, with ability to define complex access controls. Document vault is an application integrated with all the aspects of the Information management system, and would have all the documents, attachments from uploaded files, attached files with issue tracker of discussions of messaging.

The way every single user sees the document vault could be different, based on his roles, the projects handled by him, document owner's settings and on top of all, rules set on the system by the admin user.

Rule Engine, Information Management Framework:

OM is an information management system framework. Many applications can be created and customized on top of this framework. This framework is fully integrated with Mechsoft's Rule Engine. (www.rulengine.com) The framework supports following ...

1. Communication
2. File sharing
3. Process flow definitions

4. Logical rules definition. These rules could be simple rules like if a document is type 'business document' then the access is limited to only

business contacts of client and company, or could be a quite complex set of logical conditions. Soon there will be advanced features like, if document had 'xyz' kind of material, and is made accessible to role 'general' then get authentication from admin. In such a case, even though one user has shared this doc with someone, it would automatically get in queue at admin, for acceptance on this sharing.

Finally, this system is recommended to be used and replace all current un-managed haphazard communications, leading to a more streamlined and successful and efficient business environment.