

ImageSite® Workflow

Connect. Review. Resolve.

ImageSite® is a Web-based document management, distribution and collaboration solution with advanced features for engineering (CAD) and technical documents. ImageSite offers enterprise-wide access to corporate information while maintaining security at all times. ImageSite is great for:

- Engineering/CAD Document Management
- Design Review and Approval
- Project Collaboration
- Release Document Distribution
- General Business Document Management

ImageSite Workflow automates your most important business and engineering processes. Define your work as a series of inter-related workflow steps with assigned deadlines. Assign users to perform tasks at each step with detailed instructions and linked documents.

ImageSite Workflow automatically notifies users at each step (by email), telling them that they have work to perform. Pending work is also listed in each user's workflow Inbox. Users complete their assignments using linked documents and the broad range of ImageSite's collaboration features.

Users advance workflows as each task is complete, from the current step to a next step, thereby automatically notifying the users who are expected to perform work at the next step.

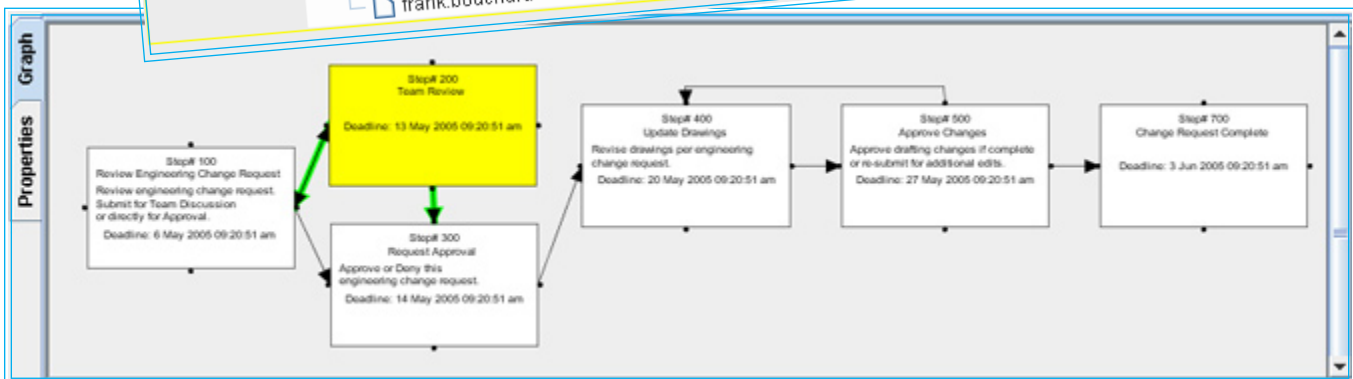
This cycle continues until the process is complete. The result is a highly efficient workflow that can be managed against an expected schedule. Completed workflows include the entire history of tasks performed; including dates, times, comments, and relevant linked documents.

Company to Company Collaboration

Since there is no software to install on individual computers – all the user needs is a Web browser. This means that ImageSite can be used by both internal users and with external partners such as consultants, suppliers, contractors, or customers.

Internally, workflow can be used to automate work processes in small groups or across entire organizations. Assigned tasks display in each user's Workflow Inbox, creating an automated "todo" list. E-mail notification helps focus users on new work as it is assigned.

Externally, workflow is a great way to connect with your customers, suppliers or contractors. Simple workflows can be used to route information for review and approval to external company users. Since workflow sends traditional email, even external users are notified of new actions or information. Workflow tasks that are late are automatically flagged for follow-up, so nothing falls through the cracks.



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Save Time

- Automatically route work assignments to the right users with email notification and a pending work inbox. Reduce down time between work steps.

Save money

- Lower overhead costs since less administrative staff is needed to push work from task to task.

Eliminate errors

- All tasks are handled through a consistent and automated workflow process so lost, misplaced, or delayed work is eliminated.

Improve service

- Customer-related tasks are expedited, meeting or exceeding the service levels expected.

Improve control

- Work with confidence that your most important tasks are handled consistently and effectively.
- Manage work in progress, optimize workflows for greatest efficiency.
- Maintain complete records of workflow tasks including all participants, decisions, linked documents, comments, date & time stamps, and more.

Workflow Graph:

- Step#100: Review Engineering Change Request. Review engineering change request. Submit for Team Discussion or directly for Approval. Deadline: 6 May 2005 09:20:51 am.
- Step#200: Team Review. Deadline: 13 May 2005 09:20:51 am.
- Step#300: Request Approval. Approve or Deny this engineering change request. Deadline: 14 May 2005 09:20:51 am.
- Step#400: Update Drawings. Revise drawings per engineering change request. Deadline: 20 May 2005 09:20:51 am.
- Step#500: Approve Changes. Approve drafting changes if complete or re-submit for additional edits. Deadline: 27 May 2005 09:20:51 am.
- Step#700: Change Request Complete. Deadline: 3 Jun 2005 09:20:51 am.

Properties Window:

Created: 29 Apr 2005 09:20:51 am
Modified: 9 Aug 2006 11:51:52 am
Category and author: Engineering Change Request Admin
Category attributes: Severity: Normal
Category properties: ECR Number: 11111
Description: Room Renovations
Workflow: Engineering Change Request
Milestone: 10 (Initial Review Deadline) (LATE) 6 May 2005 09:20:51 am
Workflow step: 100 - Review Engineering Change Request
Resolution Date: None

Linked Documents:

0104201.tif-1	fdb markup
010420b.dwg-1	Renovation Instructions
Standards	

Standards Folder:

- ImageSite 5.0 Release.pdf-1
- ImageSite Fast Facts 2003.pdf-1
- ImageSite Gets SAP Certification.pdf-1
- ImageSite Workflow 2003.pdf-1

CAD Annotations:

- These rooms require new phone connections.
- These areas require painting.

Automatically route linked folders, documents, and markups from user to user to complete any type of business or engineering work processes.

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Key Workflow Functions

ImageSite offers extensive ad hoc distribution and collaboration features that can greatly boost productivity. The Workflow module extends these benefits by providing structured work processes that automate collaboration activities. These workflows ensure that users follow specific procedures to handle important business tasks.

- Review workflow diagrams to understand which step is currently active, users at each step, and deadlines set for each activity.
- Assign multiple reviewers to any step of the workflow.
- Delegate work to others by reassigning responsibility for a task from yourself to others.
- Receive email notifications of tasks that have been directly assigned or delegated to you.
- Receive email updates from users to whom you have delegated assignments.
- Receive email notices of work that is past due.
- Link workflow tasks directly to documents, markups and other information you need to get the job done.
- Establish workflow decision criteria to ensure that the appropriate people review or approve documents.
- Notify various individuals via e-mail of the steps that require attention or steps that are past the scheduled due date.
- Add descriptive comments to explain decisions or collaborate with others in the workflow process.
- Use custom attributes to categorize and find workflow tasks. Automate those workflow tasks based on workflow decision paths.
- Enable multiple users any workflow step to perform parallel work processes. Use the "Any Can" condition at any workflow step to enable a first-come-first serve approach. Use the "All Must" condition at any step to enable group consensus and decision making.
- Maintain work history of workflow activities with date & time stamps.
- Monitor progress of workflow tasks against individual or multiple schedules. Identify workflow issues that are approaching deadlines and take corrective action.
- Link individual workflows together to let the exit of one process become the start of another workflow process.
- Use a powerful search engine to quickly find work in progress based on various attributes including type, title, creation date, description, comments, and more.
- Monitor progress of workflow tasks against individual or multiple schedules.
- Identify workflow issues that are approaching deadline dates and take corrective action.
- View reports on screen or export data for further analysis.
- Leverage ImageSite's security model so that only designated users can access the appropriate features & stored information.
- Automatically update document attributes based on workflow process.

Launch new workflow issues with detailed instructions, a schedule and pre-assigned workflow steps.

Issue Workflow name	Created By	Create Date	Schedule
Document Development and Release	frank.bouchard	2 Feb 2006 10:43:21 am	Document Development and Release Schedule
Drafting Change Request	frank.bouchard	11 Jun 2004 11:57:02 am	Drafting Change Request Schedule
Drawing Release	frank.bouchard	11 Jun 2004 11:57:13 am	Drawing Release Schedule
Engineering Change Request	frank.bouchard	11 Jun 2004 12:04:54 pm	Engineering Change Request Schedule
Engineering Change Request2	frank.bouchard	31 Jul 2006 12:51:04 pm	Engineering Change Request Schedule
Management Review	frank.bouchard	11 Jun 2004 12:05:03 pm	Management Review Schedule
PlanSet Approval	frank.bouchard	11 Jun 2004 12:05:12 pm	PlanSet Approval Schedule
RFI to Construction	frank.bouchard	11 Jun 2004 12:10:14 pm	RFI Schedule
RFI to Consultant	frank.bouchard	11 Jun 2004 12:06:30 pm	RFI Schedule
RFI to Customer	frank.bouchard	11 Jun 2004 12:06:36 pm	RFI Schedule
RFI to Engineering	frank.bouchard	11 Jun 2004 12:06:45 pm	RFI Schedule

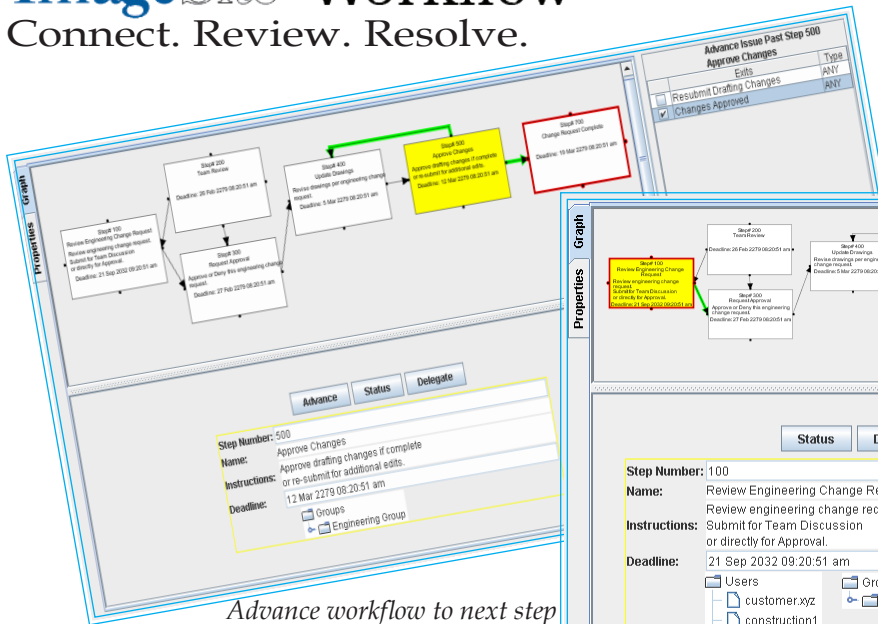
Create as many workflows as needed to solve your important business or engineering processes.

Milestone number	Description	Type	Milestone date (relative)
10	Initial Review Deadline	Major	7.00 days
20	Team Review Deadline	Major	14.00 days
30	Initial Approval Deadline	Major	15.00 days
40	Drawing Updates Deadline	Major	21.00 days
50	Final Approval Deadline	Major	28.00 days
60	ECR Rejected	Major	30.00 days
70	ECR Complete	Major	35.00 days

Track individual workflow tasks against schedules. Receive automatic notification if tasks are late.

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Delegate workflow tasks to other users.
Monitor activities and results.

Advance workflow to next step when your task is complete.

The screenshot shows the 'Delegate' interface for Step 100:

- Step Number:** 100
- Name:** Review Engineering Change Request
- Instructions:** Review engineering change request. Submit for Team Discussion or directly for Approval.
- Deadline:** 21 Sep 2032 09:20:51 am
- Users:** customer.xyz, construction1, cad1
- Groups:** Project Management Group
- Assigned Users:** chris.fletcher
- Select Users:** Engineering, chris.fletcher, frank.fortson, encap1, project.mgr, robin.wilsey, control.mgr, consultant1

Powerful workflow search engine.

The 'Search Issues' form includes the following fields:

- Hit limit: 50
- Project: 2-Engineering
- Issue Title: (empty)
- Issue number: (empty)
- Description: (empty)
- Issue category: Engineering Change Request
- Category attributes: Severity: Critical
- Category properties: ECR Number: 151
- File names: (empty)
- Markup names: (empty)
- Folder names: (empty)
- Comment title: (empty)
- Comment description: (empty)
- Comment type: Select a comment type

Engineering Change Requests

Use Workflow to automate your engineering change process. Route work packages for review and approval and then forward the change request to CAD users for drawing updates. Workflow drives users directly to associated documents and markups. The recipient can collaborate with the originator and resolve questions immediately. Users check out linked documents, update drawings and check-in revised files. ImageSite automatically handles all revision control information. When changes are complete, the work is automatically routed to management for review, approval, and drawing release.

Issue Management

Establish structured response strategies through resolution for all types of business or engineering issues. Tailored uniquely to your business, issue management can range from simple routing slips to complex, multi-step processes with critical schedule deadlines.

For example, a local government building permit department can define issues related to building code violations. Construction firms can identify as-built issues and route them to the design group for immediate response and resolution. Field service staffs can identify issues with the installation of equipment. Quick resolution helps boost customer satisfaction.

New Document Indexing and Review

ImageSite Workflow is an excellent way to provide structured review and approval for new documents going into ImageSite. Workflow automatically routes documents to designated users for quality control review, indexing and release approval. Once approved at each workflow step, the documents automatically move to a new folder so that other users may participate in assigned tasks.

Search Results

Project	Type	Number and title	Category	Create Date	Workflow Step Name	Milestone due date
2-Engineering	Issue	18: This is my change request	Engineering Change Request	14 Jan 2005 06:04:24 pm	Change Request Complete	18 Feb 2005 05:04:24 pm
2-Engineering	Issue	32: Room Renovations	Engineering Change Request	29 Apr 2005 09:20:51 am	Review Engineering Change Request	6 May 2005 09:20:51 am
2-Engineering	Issue	63: Change request for Barrel	Engineering Change Request	2 Dec 2005 02:42:42 pm	Approve Changes	30 Dec 2005 02:42:42 pm
2-Engineering	Issue	66: Wall changes	Engineering Change Request	7 Dec 2005 03:33:24 pm	Change Request Complete	11 Jan 2006 03:33:24 pm
2-Engineering	Issue	67: Wall removal	Engineering Change Request	7 Dec 2005 04:02:45 pm	Change Request Complete	11 Jan 2006 04:02:45 pm
2-Engineering	Issue	109: fortson	Engineering Change Request	27 Feb 2006 01:11:51 pm	Request Approval	14 Mar 2006 01:11:51 pm
2-Engineering	Issue	113: Change request for Project XYZ	Engineering Change Request	31 Mar 2008 11:54:24 am	Update Drawings	21 Apr 2008 12:54:24 pm
2-Engineering	Issue	138: My changes attached	Engineering Change Request	26 Jul 2006 03:26:27 pm	Review Engineering Change Request	4 Aug 2006 03:26:27 pm

Drill down to each workflow to see complete details.



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