ImageSite®
For SolidWorks

SOLIDWORKS

Solution Partner

Key Features:

» Excellent SolidWorks integration

» A total solution for all your engineering and business data

» Great document distribution with notifications and subscriptions

Key Benefits:

» Leverage SolidWorks data throughout your enterprise to non-SolidWorks users

ImageSite® combines the best features of Product Data Management (PDM) with internet based Project Collaboration Software

But unlike a hosted collaboration solution, ImageSite installs on your corporate network so your important SolidWorks files, other engineering data, scanned files and business documents are always under your secure control.

Use ImageSite to provide a secure environment to organize, version control and widely distribute your SolidWorks designs. As new versions of SolidWorks Assembly, Part and Drawing files are checked into the system, the previous version is automatically archived along with any related notes, comments and markups.

While ImageSite is affordable it is also very comprehensive and can be fully implemented in just a matter of days.

ImageSite was designed from the ground up for engineering use.

Its web based design allows authorized users to access engineering content with only a web browser or directly through Windows Explorer.

Use the single, integrated web viewer for quick access to not only SolidWorks but also to AutoCAD®, MicroStation®, MS Office® files, scanned files, PDF files, and more.

SolidWorks "Active" Design

Use ImageSite for version control of active Assembly and Part files as engineers and designers check-out and revise SolidWorks designs.

Use ImageSite Workflow for automated change management to route SolidWorks files, markups and supporting documents for review and approval. Workflow is flow chart-based and schedule-driven, with automatic email notifications.
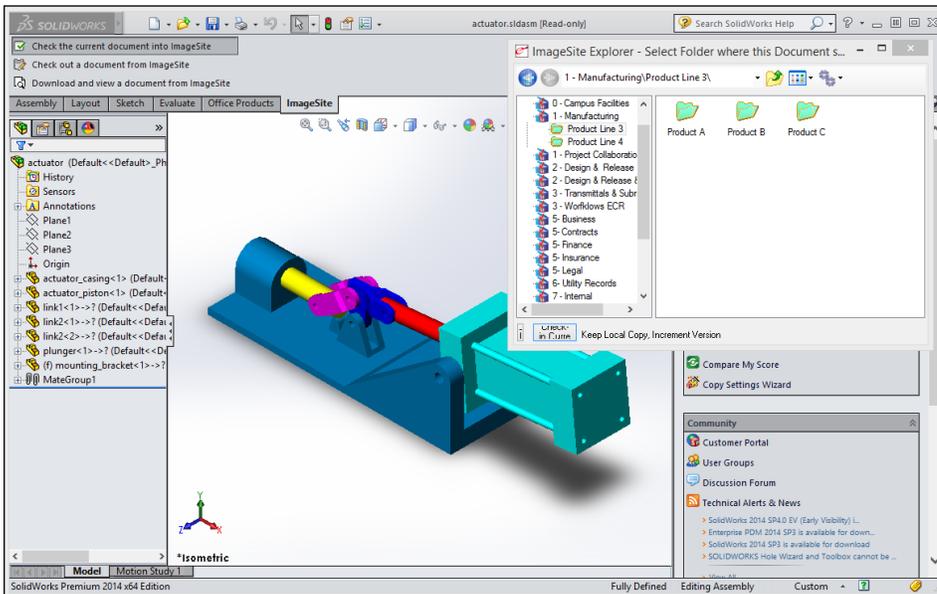
SolidWorks "Released File" Mgt.

Use ImageSite for "Released Document Management," for collaboration and distribution throughout your organization as well as to external users (customers, vendors, etc.), even from the cloud or as a hybrid configuration.
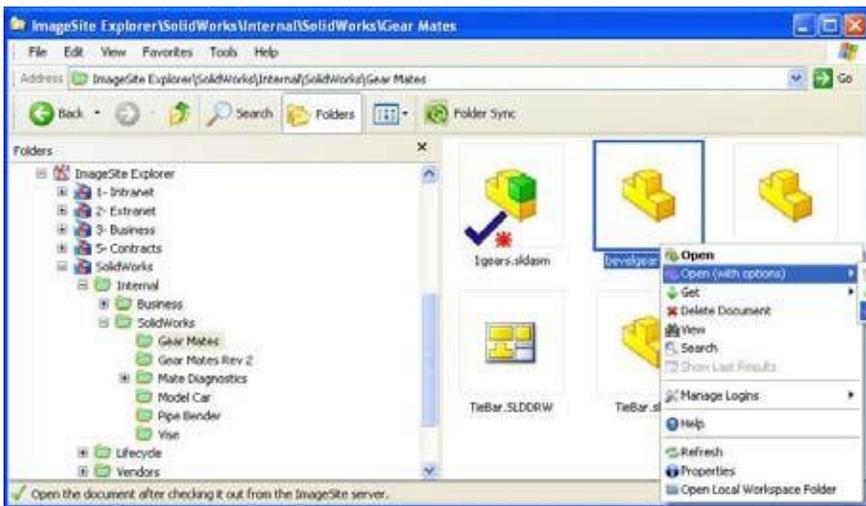
Document control specialists can manage SolidWorks files once they are released for widespread viewing, collaboration and general usage by others in the organization.

A Collaboration Workspace

Configure ImageSite as "the place to go" for all authorized users to find current project or product information and to actively work together.

ImageSite's SolidWorks add-in is directly integrated with the SolidWorks menu ribbon, allowing you to check-in and check-out files for controlled editing without ever leaving SolidWorks.
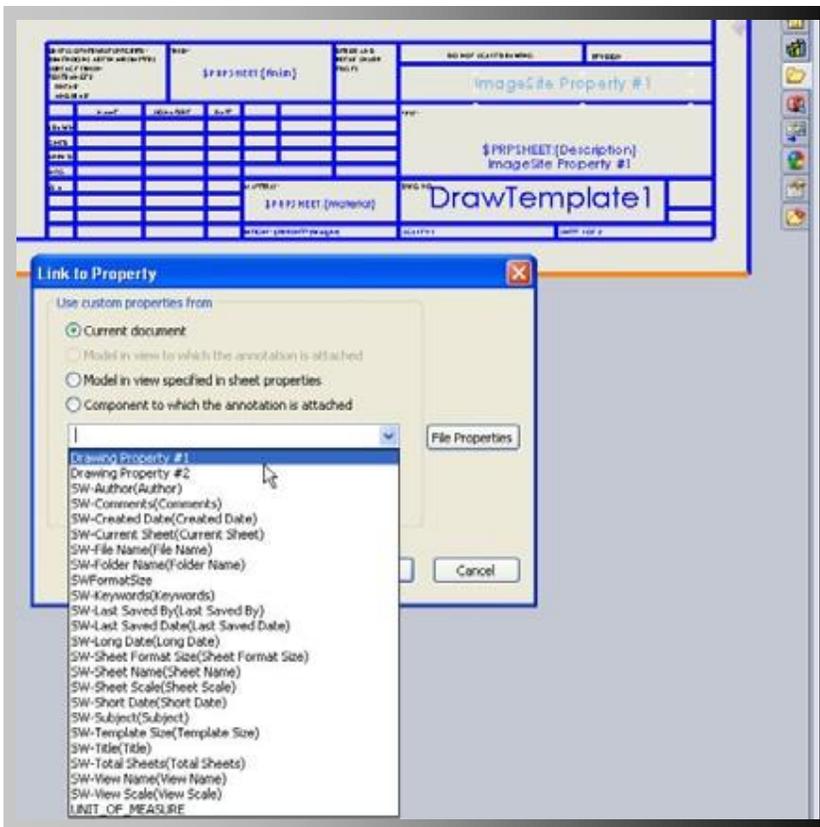
ImageSite Windows Explorer enables direct check-in/-out from both Windows Explorer and from Solid-Works. Visual status symbols show documents checked-out by you and others. Context menus change depending upon each user's security settings and document status. For example no "check-out" command is available for documents already checked-out by others but the "check-in" option is provided if you are the one who has a document currently checked-out for revision. The file selected in this image is not currently checked-out and is therefore available for this user to check-out and perform SolidWorks edits.

SolidWorks Integration

ImageSite provides direct integration within SolidWorks for Assembly, Part, and Drawing file check-out and check-in through its web browser interface, through Windows Explorer, and from within SolidWorks. ImageSite's Windows based commands are security driven and context sensitive so right clicking on SolidWorks files gives users only the commands they are authorized to use.

For example, authorized users edit SolidWorks files by simply checking them out. To "check-out" a file within ImageSite means to get a working copy of a file to make edits/revisions.

A protected original of the file always remains in the ImageSite repository along with as many prior versions as have been configured for storage.

Upon check-out, users are launched directly to the appropriate application where edits to the file are performed.

In this case, checking-out SolidWorks Assembly, Part or Drawing files launches the user into SolidWorks. ImageSite automatically downloads all associated (linked) parts automatically for SolidWorks Assemblies and Drawing files.

Checked-out files are provided in a read/write mode for direct editing while the supporting downloaded linked files are read-only to prevent edits from being made accidentally.

Assembly/Part Navigation

While working in SolidWorks with one Drawing, Assembly or Part, it is quite common for users to require editing of another linked file. Simply navigate in the ImageSite Explorer Add-in interface, select one or many desired files and specify "check-out." The selected files are checked-out, changed to read/write mode and are immediately available for SolidWorks editing. When the edits are complete, simply select the "check-in" option and the revised file(s) are posted to the ImageSite web server as new versions.

SolidWorks Data Distribution

ImageSite extends the benefits of your SolidWorks data throughout your entire organization by using your designs more effectively. Any authorized user, including non-SolidWorks users can view and markup 2D SolidWorks Drawings and rendered images of 3D SolidWorks Assemblies and Parts directly within the ImageSite web browser user interface. These users

don't need an expensive license of SolidWorks or the extensive training to work with your SolidWorks files.
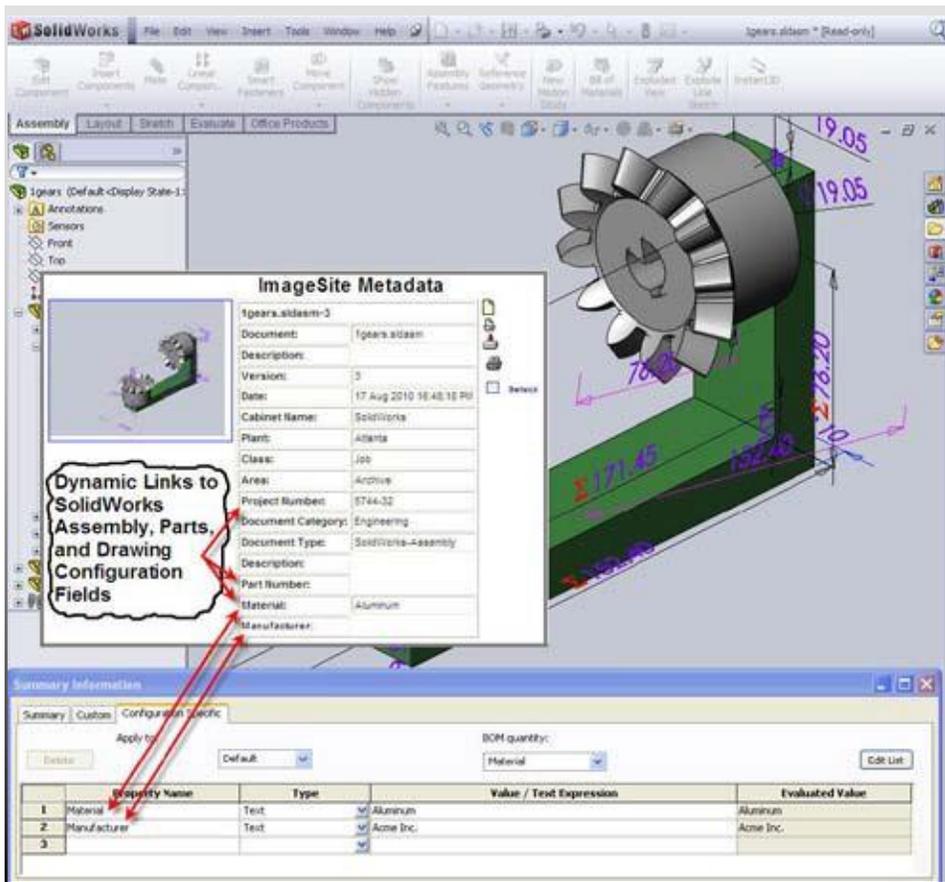

ImageSite directly links to SolidWorks Property values stored within SolidWorks Assembly, Part and Drawing files, allowing for convenient searches to find exactly what you are looking for.

ImageSite's integration with SolidWorks links Property Values in SolidWorks' Assembly, Part and Drawing files directly to ImageSite search criteria (metadata).

SolidWorks File Search
(File Properties Integration)

ImageSite provides powerful search capabilities for SolidWorks files based on their internal property information. ImageSite metadata (search field values) link directly with SolidWorks Properties stored within SolidWorks files. This includes both standard (pre-defined) SolidWorks Properties and Custom Properties, as defined in each SolidWorks Assembly, Part and Drawing file.
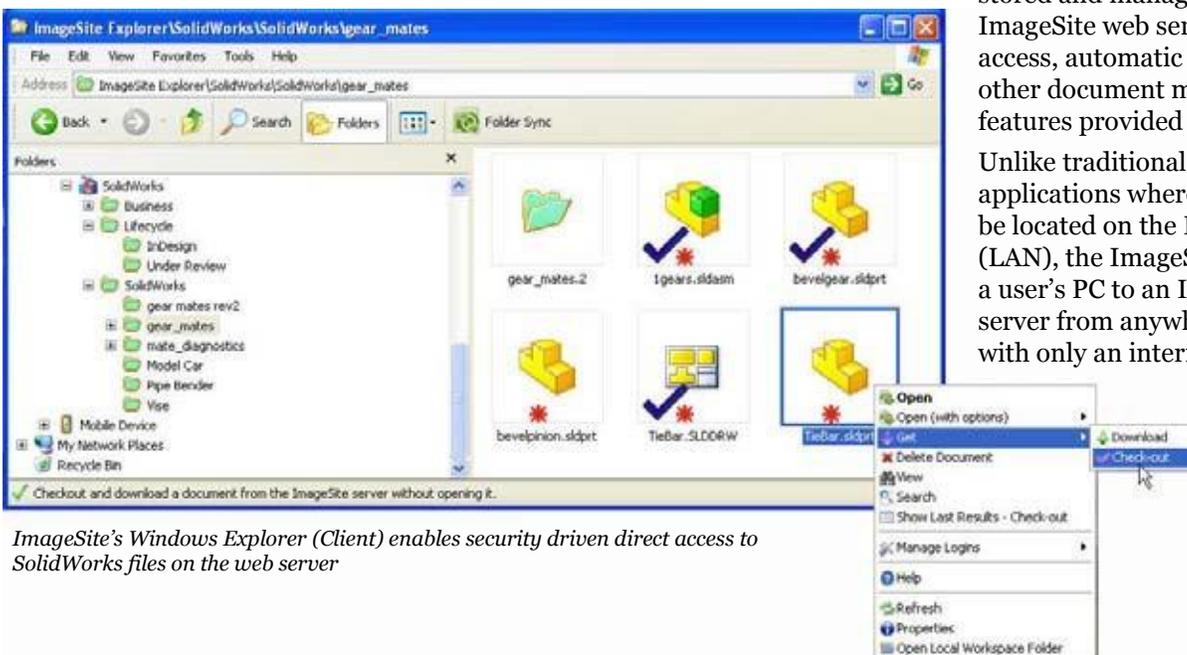
ImageSite links to both the general SolidWorks properties and to *configuration specific* SolidWorks properties for Assembly and Part files. For Drawing files, ImageSite links to the SolidWorks Properties as defined within the Drawing file itself or to Properties from the Model to which the Drawing references.

Direct Windows Access

ImageSite Windows Client is embedded within Windows (and Windows applications such as Microsoft Office) for direct communication between each user's personal computer and the secure ImageSite repository. This also enables direct application integration.

Using the Windows Client is similar to connecting to a "shared network drive." However, with ImageSite Windows Client, documents are stored and managed on the ImageSite web server with controlled access, automatic versioning and other document management features provided through ImageSite.

Unlike traditional client/server applications where the server had to be located on the Local Area Network (LAN), the ImageSite Client connects a user's PC to an ImageSite web server from anywhere to anywhere, with only an internet connection.
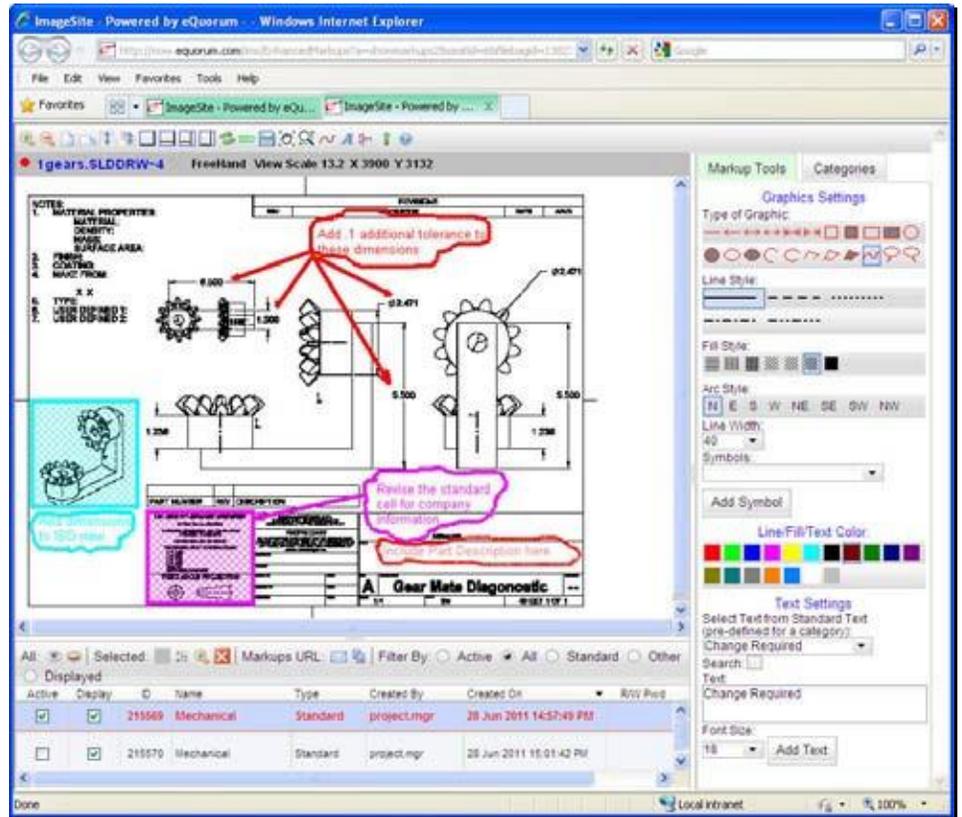

ImageSite's Windows Explorer (Client) enables security driven direct access to SolidWorks files on the web server

Engineering Collaboration

ImageSite Markups

ImageSite provides a robust, web based markup capability for easy drawing markup, review and resolution solution for a variety of engineering and design processes.

- Use ImageSite's extensive markup drawing pallet for lines, shapes, and text markups, including custom symbol placement.

- Dynamic sorting of markups by markup category, markup creator, markup date, markup comments, lock status, and other key information.

- Automatic "zoom-to" feature allows users to instantly review each element of a markup within each markup layer.

- Email markup links to one or many markups, driving recipients directly to the markups you want them to see.

ImageSite has excellent engineering markup tools that allow non-SolidWorks users to view and markup up both SolidWorks Drawings as well as rendered images of Assembly and Part files.

Document Management

Manage any kind of document with ImageSite. You have full control over who has access to what document, as well as what they can do with it.

- Use ImageSite's powerful search engine to quickly find the documents you need. You can even search for specific back revisions of documents.

- Save important searches for convenient reuse and email links to saved searches for others.

- Configure document and folder attributes uniquely with unlimited metadata; including mandatory fields, pre-defined pick lists and default values.

- Use "Metadata Propagation" to automatically assign document metadata based on the folder where documents are deposited into; a tremendous time saver that ensures documents get indexed correctly, with less time and effort.

- Organize company information in Windows-like folders and sub-folders for convenient user navigation.

- Automatically upload documents into ImageSite with the powerful acquisition subsystem, from a variety of data sources such as scanners, email servers, FTP locations and network drives. Documents are uploaded and metadata assigned without any additional user actions required.

- Create and distribute dynamic document sets for access by specific users, groups, or teams.

- ImageSite's automatic versioning ensures everyone works with the most current documents. As new versions of files are checked-in, the previous version is auto-matically archived, along with notes, comments and markups.

Document Level Security
- ✓ Full Control
- ✓ Can View Only
- ✓ Can Delete
- ✓ Can Create New Documents
- ✓ Can Create New Folders
- ✓ Can Download
- ✓ Can Print
- ✓ Can Annotate
- ✓ Can Check-out/-in
- ✓ Can Modify Metadata
- ✓ Can Earmark

Document Distribution

ImageSite offers advanced document distribution features to allow you to work together more efficiently. Use email to send compact messages with hot links to the documents you want others to work with.

Send email hot-links (URLs) to:
- ✓ SolidWorks Files
- ✓ Other Documents
- ✓ Mixed Document Sets
- ✓ Saved Searches
- ✓ Markups
- ✓ More...

Documents are always secure since they never leave the ImageSite repository. All users must be authorized to access documents, even when using email distribution links.

Stop clogging up your network with emailed SolidWorks file attachments!

Send light weight email messages with hot links (URLs) to documents you want others to see and use. Clicking on the ImageSite links automatically prompts the user for login/ password information.

Document Distribution

ImageSite is uniquely designed to handle the complex requirements of engineering document distribution and batch printing. The ImageSite Outbasket works like a shopping cart in a commercial web site allowing users to easily create sets of documents. Engineering transmittals can be electronically distributed or direct printing can be performed to devices located down the hall or anywhere around the world on your corporate network.
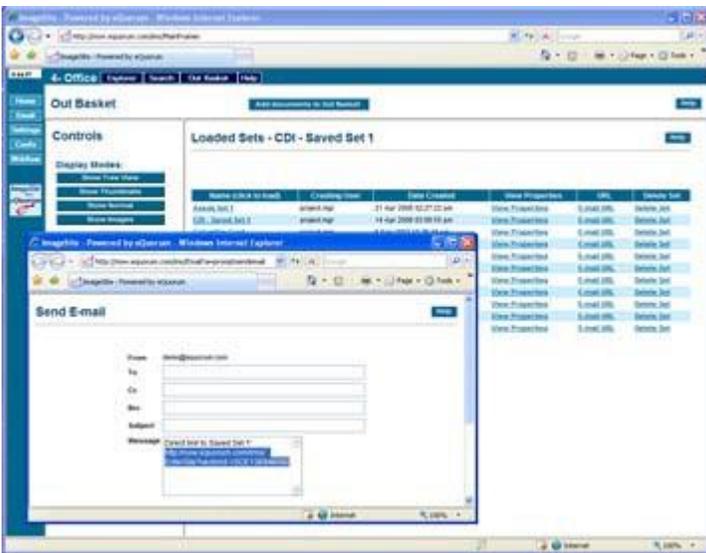
- Quickly submit one or hundreds of files for direct printing with minimal button clicks. No need to download, open, and print each, one at a time.

- Powerful conditional stamping and watermarks create print overlays based on each document's attributes, such as check-out status, approval status, or digital signatures.

Send lightweight email messages with hot links (URLs) that drive recipients to a variety of targeted locations in ImageSite, including documents, folders, markups, searches, and, in this case - document sets.

ImageSite's "Rapid Index" user interface makes it easy to assign search attributes to individual documents, zooming to documents to confirm values and carrying forward group assignments.

Engineering Transmittals

Configure ImageSite to perform electronic document transmittals instead of printing to paper. ImageSite converts sets of files from the Outbasket (or Cart), creating PDFs and emailing them to specified users.

Better yet, eliminate email attachments altogether for even more efficient document distribution by posting selected files to an ImageSite distribution cabinet. Automatic emails notify users when new documents are available for their review. Recipients receive email messages that drive them to the online documents you want them to see.

Your documents always remain secure and ImageSite provides a complete audit of which users accessed which documents, when, and how.

CAD Connector Modules

AutoCAD® Connector

- Dynamic reference file detection, upload and database linking. ImageSite automatically reads reference file connections, uploads reference files (x-refs), and links them correctly in the ImageSite repository.

- Title Block Integration automatically synchronizes AutoCAD Block/ Tag and Field data with ImageSite attributes, in both directions.

- ImageSite makes ordinary text strings in AutoCAD files fully searchable when the AutoCAD Connector is combined with ImageSite's Full Text Search module. Users perform searches and find AutoCAD files based on word or phrase searches in combination with metadata based searches.

- Web based vector CAD viewing with layer and reference file display control.

- Server side, comprehensive batch plotting with direct network access to any worldwide network printing or plotting device.
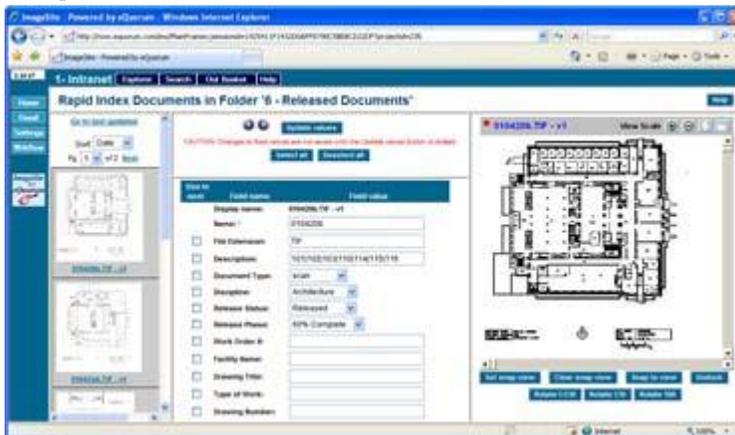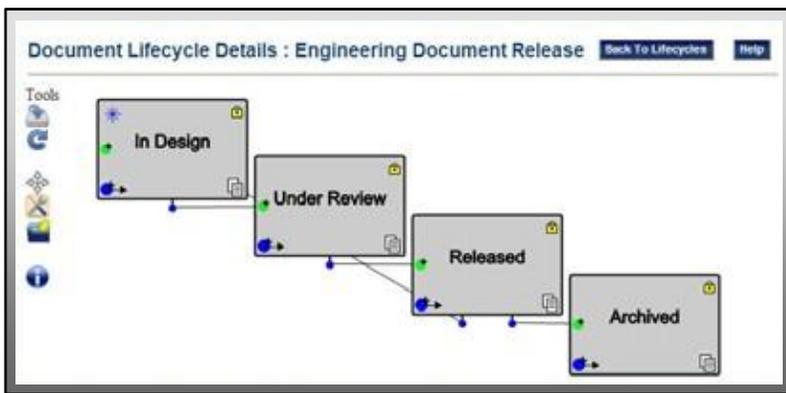
Advanced Modules

Full Text Search

This module provides full text searching for words or phrases within Microsoft Office, PDF and text-based files stored in ImageSite. Simply type the word or phrase from any stored document (including email) and search.

Windows Login Authentication

The Domain Security module automatically creates (and deletes) user and group assignments based on Windows Active Directory® settings. Users are automatically logged into ImageSite based on their network security credentials.

ImageSite's Document Lifecycle subsystem triggers automatic processes, such as email notifications and changes to security settings, as documents change from one lifecycle state to another.
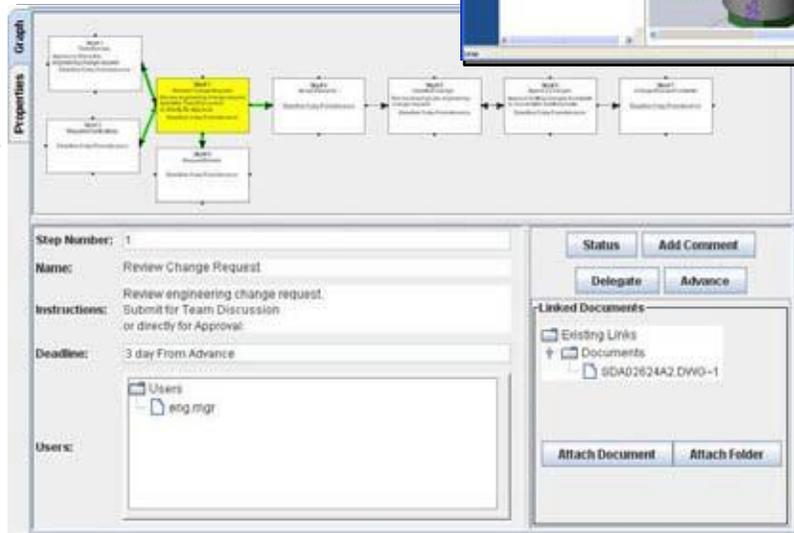

Workflow

ImageSite Workflow lets you create schedule driven, flowchart based workflows to automate your most important business processes. It ensures timely document review and approval by routing documents automatically to users.

ImageSite Workflow contains two major subsystems, a Document Lifecycle capability and an Approval Routing capability; these two subsystems work together to provide a very powerful and highly configurable business process automation solution. Individual documents within ImageSite can automatically be assigned a lifecycle, and lifecycles can drive Approval Routing.

Lifecycle

Automatic lifecycle assignment is typically based on the type or category of document and its intended use. Each document lifecycle can contain multiple "States," each signifying an important change in the status of the document.

Actions such as a change in folder location, a version change, a date criteria, or an approval workflow can change a document's lifecycle from one state to another.

Workflow Routing automatically "carries" linked folders, documents, and markups from user to user to complete any type of business or engineering work process.

As documents change from one lifecycle state to another, a variety of actions can automatically be performed, such as:

- Change a document's metadata, such as an Approval Status value.
- Modify the document's security settings.
- Copy or Move the document from its current location to another.
- Delete or Archive the document.
- Launch an Approval Routing workflow automatically.

Approval Routing

The Approval Routing subsystem of ImageSite is equally as powerful. This is a flowchart based and schedule driven capability that "carries" documents (and markups and folders) from user(s) to user(s) to automate virtually any schedule driven business process. When the user clicks on a current task, they are immediately presented with a flowchart view, showing them where their action is relative to the overall business process.

The workflow route contains a complete history of the linked documents and comments entered by every participant in the workflow with a date and timestamp of when users made comments or advanced the workflow from one step to another.

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