

# IMAGESITE KEY FEATURES CHECKLIST

## General System Features

- Store and manage any document or file type
- Totally browser-based, no software to load
- Choice of web-browser software (HTML5-compliant)
- No JAVA required
- Single viewer for all file types
- Advanced explore and search functions for documents
- Unlimited projects, unlimited user accounts
- Project templates
- Highly scalable.

## Security Features

- Multiple/robust data access security
- Secure Socket Layer (SSL) implementation
- Multi-Factor Authentication (MFA)
- NIST/ITAR/NERC-CIP compliant
- Full-fledged audit tracking and reporting
- Security for mobile device access
- Automatic domain security with Windows Active Directory and ID providers
- Configurable user interfaces and user profiles.

## Document Management Features

- Full document indexing (metadata) for fast search and print
- Simple searching features
- Popular, Favorite, Default, and Advanced search options
- Full text search (documents and metadata)
- Automatic metadata propagation
- Rapid indexing for scanned documents
- Document viewing/printing watermarking
- PDF publishing of any document type.

## Extensive Revision Control System

- Configurable revision naming schemas
- Multiple revision schemas
- Upload not dependent on revision order
- Optional major and minor revisions tracking and display
- Engineering release and change management

- Linked file families (e.g., major/minor/published)
- Authorized check-out and check-in
- Automatic new revision detection
- Complete revision history
- Complete audit trail feature set.

## Integration Features

- Automated CSV searches
- Bulk document uploading
- Selective search using URLs
- No proprietary data storage (files still available even if database is down)
- Automatic data acquisition
- Application Programming Interfaces (APIs) that are simple and easy to configure.

## Collaboration Features (Redlining)

- Multiple document display options
- Extensive markup tool set
- Custom symbols and images in markups
- Event and Workflow subsystem notifications
- Add notes, photos, and video
- Real-time collaboration with instantaneous synching of changes.

## Mobile Device Access

- Mobile device independent
- Download of any drawing or document for offline viewing
- Touch to select and pinch-push to zoom
- Easy access to recently viewed documents
- View, pan, and zoom CAD drawing files without needing CAD software
- Real-time collaboration
- Offline access and encryption
- Fully secure using user access profiles from document management system.

## Dashboard

- Frequently used documents, sets, searches, uploads, and downloads
- Favorite documents, sets, searches, uploads, and downloads
- Checked-out documents
- Workflow and transmittal assignments
- Notifications (internal and external)
- ImageSite News.

## Sets

- Creation of sets of disparate documents
- Frozen and unfrozen sets
- Version sensitive sets
- Private and public groupings
- Email links to existing sets
- Notes associated to sets.

## Multi-Site \ Cloud-OnPremise Synchronization (if required)

- File synchronization across multiple locations
- File sharing between Cloud and On-Premise implementations
- View of folders and documents across the organization, not just the local server
- Security and access control over home server documents on remote locations
- Management of synchronization behavior (where, how, and when synch occurs)
- Directionality of synching.

## Configuration Features

- Configurable user interfaces
- Configurable search user interface
- Single sign-on using Windows Active Directory (On-premise and Cloud)
- Automatic launching of any application (requires WebSocket Adapter).

## Enterprise Printing/Publishing

- Conversion to alternative formats (e.g., PDF)
- Batch plotting management
- Server-side plot processing
- Print/Plot to any networked device
- Configurable print destinations
- Highly configurable printing options
- One-click printing
- Save and reprint set printing
- Conditional document stamping, watermarking, and markup embedding
- Print requests and direct printing.

## Electronic Distribution

- URL linking
- Transmittals subsystem
- RFI/Submittal subsystem distribution
- Cloud synch distribution and notification
- Search sets and existing sets linking.

## Workflow and Lifecycle Management

- Schedule-driven, multi-step task assignment
- Task notifications
- Late completion notifications
- Change-of-state automatic changes
- Role based participants and security
- Workflow based attributes
- Automatic retention and archiving protocols.

## Transmittals Management

- Send transmittal files as any or all links, attachments, and multi-page PDF
- Require confirmation notification
- Use tailored transmittal templates
- Request approval acknowledgement
- Track and report on all events/changes
- Create transmittals from pre-set sets/packages

## RFI/Submittal Management

- Assignment of Project Managers
- Tracking of inbound RFI/Submittals
- Due dates for responses
- Tracking of replies
- Tracking of response development
- Identification of final answers

## CAD/PDM Features

- Dynamic CAD reference file support
- CAD software support
- Browser-based CAD features
- Title block integration (bisynchronous)
- Automatic reference file updating
- High performance, integrated viewer, not requiring additional licenses.