ImageSite® Workflow+

Workflow+ gives project managers, document controllers, and users improved control and visibility over workflows, making it easier to manage and report on the complex relationships often required to complete related tasks.

Engineering workflows are developed and managed using our canvas-like building tool, to easily create, edit, and conceptualize workflows. Using simple rule-based logic, workflow users can control the actions of a document or set of documents at each step (task), eliminating the need for the manual transfer, deletion, publishing, copying, or archival of documents and drawings while notifying users of tasks to be accomplished and their due dates.

Automate Engineering and Business Processes

Administrators or users define work as a series of inter-related workflow steps with assigned deadlines. Assign users to perform tasks at each step, with detailed instructions and all the documents/drawings the user needs linked directly to the assignment along with a desired deadline. The software automatically notifies users at each step, either through conventional emails or internal notifications that appear in the user's Dashboard, or through both. Users can establish how often they receive internal notifications and through which mechanism they prefer.

Workflow+ allows system administrators to automatically adjust user permissions at each step, ensuring your company's files are managed securely and only accessed when needed, or create totally automated lifecycle templates for approval routing or archiving procedures.

Workflow+ can be used to manage a wide variety of review and approval processes, and includes a versatile voting feature that can be modified depending on your company's needs and the concept of participant roles whereby users, or groups of users, can be assigned to tasks upon the initiation of the workflow or even just before a step in started. Users, with permission, can also delegate their task to other users or simply ask for input prior to making an approval decision.

Assign different workflow schedules to specific processes to reflect high-priority and expedited workflows or recognize changes to task completion dates. Schedules can be fixed, or floating where deadlines are dependent on completion dates of precursor steps.

Completed workflows include the entire history of tasks performed, including who performed the tasks, dates and times, all comments, and linked documents with applicable versions. This makes review and analysis easy and ensures all parties have a record of historical data for audit, analysis, and compliance purposes.

Key Features and Functions

- Auto-assignment of tasks to a user, multiple users, or a group of users
- Graphic display of workflows, with steps, deadlines, and progress
- Link and display documents, markups and other files to workflow tasks
- Multiple schedules applicable per workflow, including floating and fixed schedules
- Auto-notification of pending/late tasks in the Dashboard or by email
- Automate workflows based on file/system conditions, such as auto-archiving
- Allow multiple required conditions for task completions
- Integrate automated tasks with manual tasks, like approvals

- Detailed audit histories of each completed workflow
- Delegate tasks to other users
- Notifications for completed tasks
- Auto-update document data based on workflow progress
- Export workflow data for analysis
- Graphs show users current position and state of workflows
- Fast and easy search to find workflows and status
- Workflows can be shown to users as a list with a detail page format
- Workflows can contain workflow-independent metadata.

Workflow+ for Collaboration

Internally, Workflow+ can be used to automate work processes in small groups or across the organization. Assigned tasks display in each user's My Workflow panel in the Dashboard, creating a "to do" list. Tasks that have not yet been viewed or are overdue are highlighted in the panel.

Externally, Workflow+ is a great way to connect with suppliers, contractors, and customers. Simple workflows can be used to route information to external users for review and approval. Since Workflow+ can send traditional email, even external users are notified of new actions or impending due dates.

Use the document linking capability to increase security by having external parties view and markup files within ImageSite so files never leave the organization. Or use Workflow+ with Engine-box.com (the Cloud version of ImageSite) and distribute and receive files without giving third parties access to the organization's network.

Attaching Files and Making Comments

A key benefit to using Workflow+ is all users are presented with the files they need to accomplish their task, whether CAD drawings, specifications, manuals test results, invoices, etc. All attached files are carried through the workflow and can be marked-up and even versioned within the workflow. Users can add numerous comments throughout the workflow that get aggregated and recorded and are visible to all applicable users.

Comments are helpful to users in adding workflow specific information needed downstream and also as a means to historically document the execution of a workflow. Comments can be entered with appropriate entry type such as Remark, Question, or Answer and can be edited and sorted any time.

Workflow Management and Control

Project managers, document controllers, and administrators have control over workflow steps and progression, including:

- Bouncing a workflow to a specific step even if it's not the next step; great for expediting or rejecting workflows
- Forcing specific groups or a user to be assigned to particular steps
- Delegating a given step to a different user than originally assigned or just asking another user to respond to you prior to completing a step
- Establishing different schedules or deadlines for task completion based on attributes and type of workflow
- Cancelling or deleting a workflow.

Integrating with Lifecycle

The Lifecycle functionality in the previous Workflow/Lifecycle module is now integrated directly within workflows to initiate the workflows and populate appropriate attribute data and needed files. Use this capability to establish retention/archiving protocols for files, for establishing review and approval processes and to kick off change workflows. Automatically update file attributes upon completion of workflows and send notifications to all interested parties. Includes all product lifecycle management (PLM) capabilities normally found in more complex PLM-only applications.

Visual Workflows

The desktop version of Workflow+ includes a visual, canvas-based tool for creating Workflow flow charts and managing steps and transitions.

Simply drop a step in the workflow and drag to the correct sequence. Attach manual or conditional criteria to advance between tasks and set off notifications.

Common Applications

Utilize Workflow+ to increase productivity and control key document-centric workflows, such as:

Engineering Change Requests

Automate engineering change packages through the organization, from review and approval, to CAD users, to QA, to production. Users check out linked documents, update and check-in revised files, and release approved files; all with version control and notifications.

New Document Indexing and Search

Workflow+ automatically routes documents to designated users for quality control review, indexing, and release approval and can automatically move related documents to appropriate projects or folders, such as Pending Orders or Customer Requests.

Document Processing

From simple routing workflows to complex, multi-step processes with schedule deadlines, Workflow+ can be used to manage and monitor document-centric procedures. Use Workflow+ for approving and paying invoices, for submitting and issuing building permits, and identifying equipment maintenance tasks and issuing needed work orders and related documents.

Key Benefits:

- Perfect for engineering change orders/requests, production routings, and document-centric workflows
- Reduces errors/rework and downtime
- Complete important tasks on-time
- Enhances communication with emails and internal notifications
- Increases visibility of work falling behind schedule
- Ensures proper work assignments
- Improves security and control of processes and critical files
- Integrate Workflow+ capability with Transmittals and RFIs/Submittals to initiate, track, and report on there key functions.
- Saves cost due to less administrative staff and rework
- Workflow+ integrates with existing ImageSite security profiles
- Users employing tablets and smartphones can still be part of workflows and notifications
- Automate work processes in small groups or across an organization to vastly increase project efficiency and ensure nothing falls through the cracks.