Timemaster Workflow
Product Overview

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Introduction

The Timemaster Workflow module provides a standard, central check-list of actions to be carried out on a project, under-takes a lot of the repetitive work of populating the documents with project data, and provides a centralised filing system for all project related files and emails.

For those organisations operating a quality management system, Workflow becomes the quality management system, customised to include your documents and procedures.

The Timemaster Workflow system provides the following functionality:

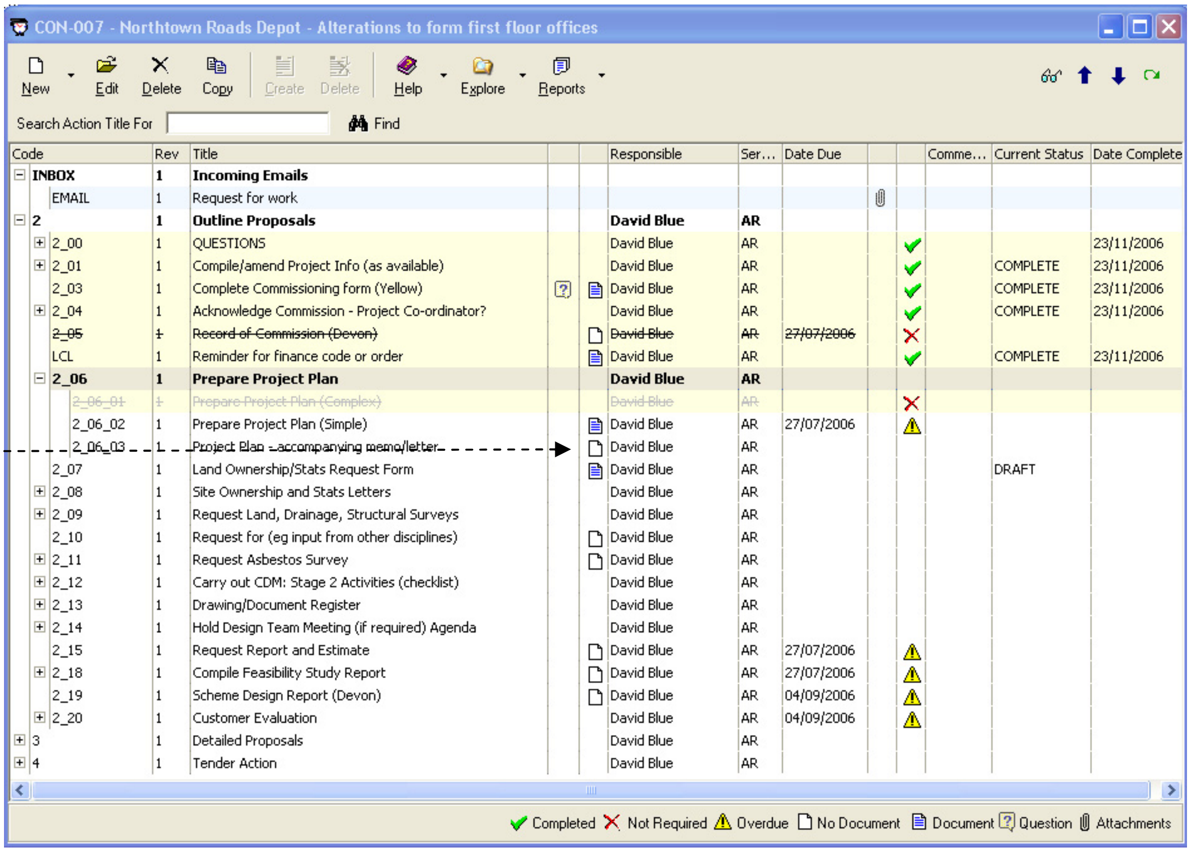
- Provides a checklist of actions required on a project.
- Centrally files all outgoing project related documentation so all documents are easily accessible to all persons involved in the project.
- Files project related e-mails and external files so they are included in the project documentation.
- Allows some actions to be marked as not required with a reason.
- Allocates staff responsibilities and dates due to key actions.
- Populates project documents automatically with repetitive project related data.
- Allows additional data to be entered on a project using question-answer items.
- Provides facility to link online guidance from your quality system.
- Keeps an audit trail of changes made to check-list actions.
- Makes it easy for others to see how far projects have progressed and what is left to do.
- Additional actions for which there is no standard document such as letters, faxes, memos etc. are automatically filed along with the rest of the project documentation.

The Project Checklist

The hub of Workflow centres on the project checklist. The project checklist is a list of actions which are normally carried out on a project. Each of these actions may:

- Be marked as not required
- Be allocated a due date
- Be allocated to an individual or service
- Be allocated a status and a comment
- Have documents attached to them

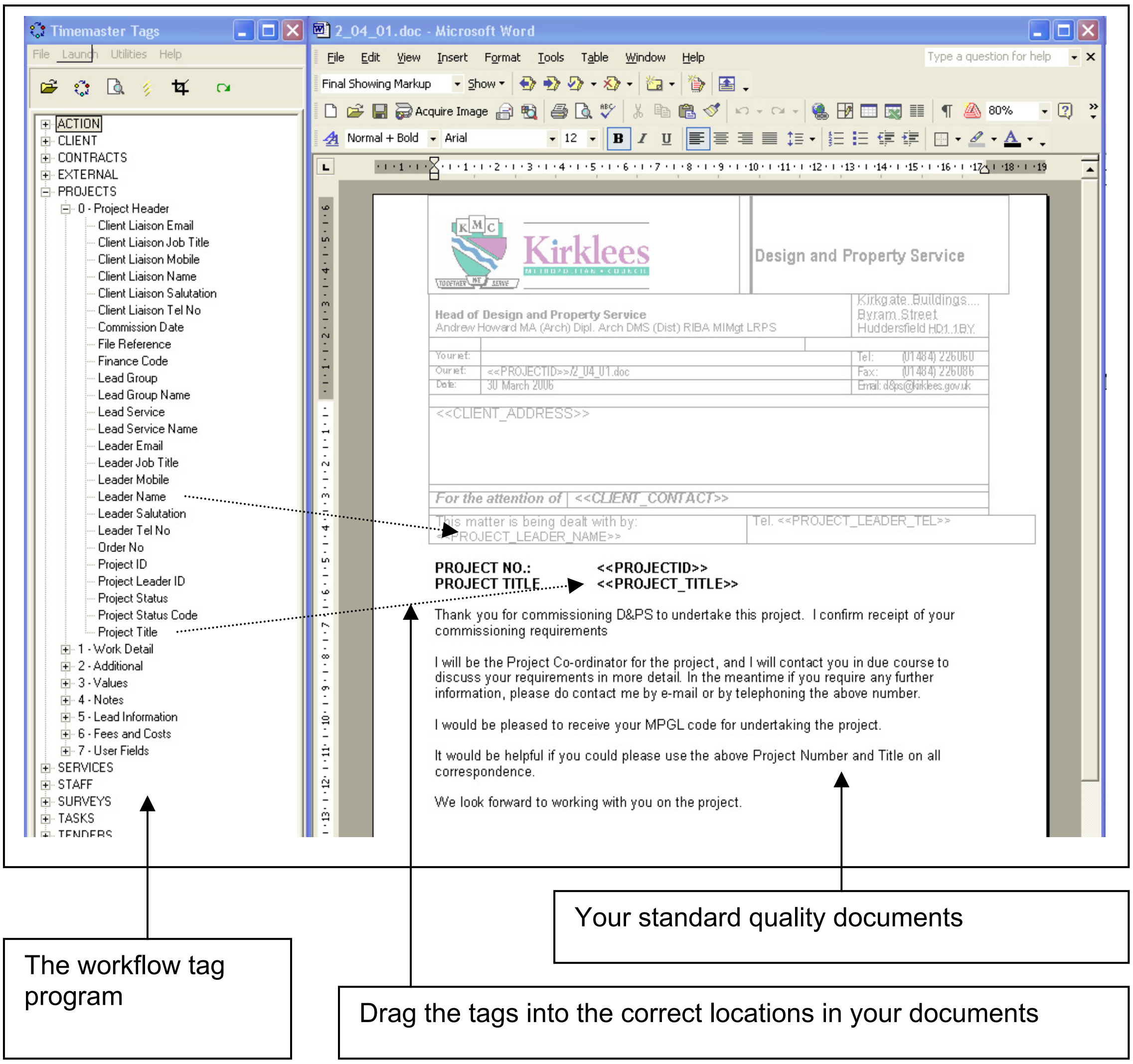
Using the Project Checklist it is easy to see which items are not required, which items have been done and which have yet to be done. You can also see who actually produced the letter or document and when it was completed.



Each action with a Document icon ( ) or ( ) is linked to a document. Double-clicking or clicking the **Create** button at the top will generate the document.

Populating Documents

Workflow uses your existing Word and Excel quality management documents. In order to populate these straight from Workflow, it is necessary to embed tags within them. When processed within Workflow, the tags will be replaced with project information.



All the tags you need are automatically created within Timemaster, including some for fees and invoiced values.

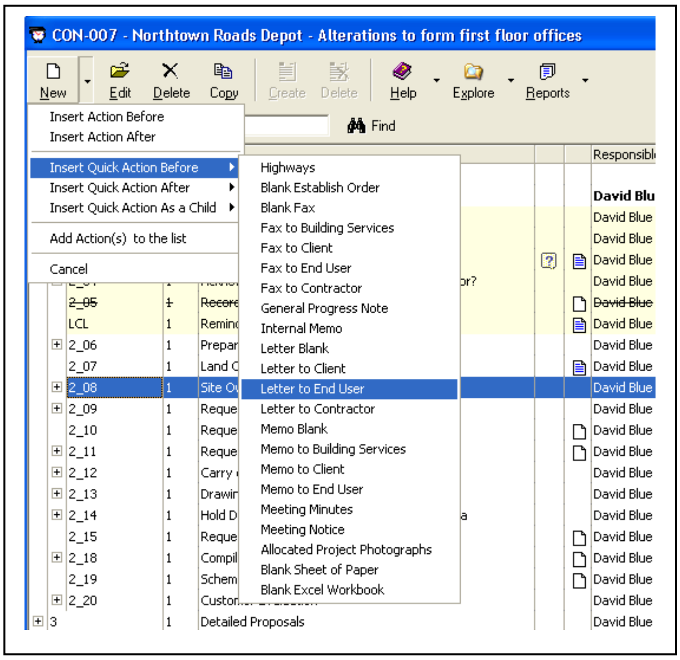
You may now also add your own fields (user fields) into the Timemaster database and include these in your documents as well.

Tags may also be written to retrieve information from any external databases, as long as they are ODBC compliant, as long as you write these tags yourself.

Creating Non Standard Documents

There will be many times when you wish to create an ad-hoc letter, fax or memo. To save you looking up the project details, client or contractor address each time, you can create ad-hoc documents and allocate them to “quick” actions.

Step 1 – Select a position in the list where you want the letter stored (or create a dummy action under which all letters are stored)

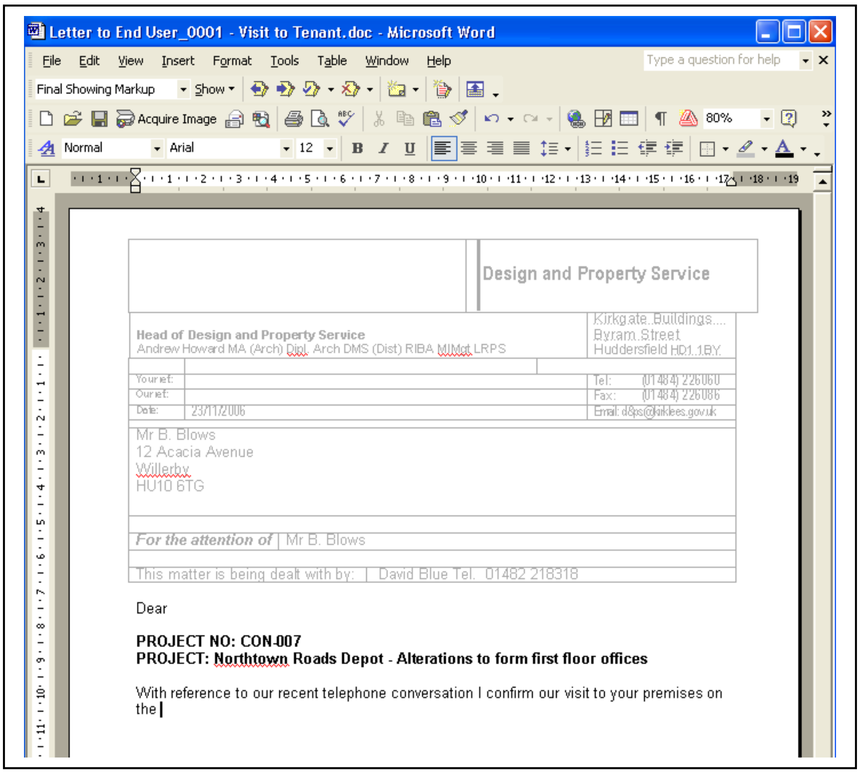


This will create a document based on a “Letter to End User” template and place it before the 2_08 action.

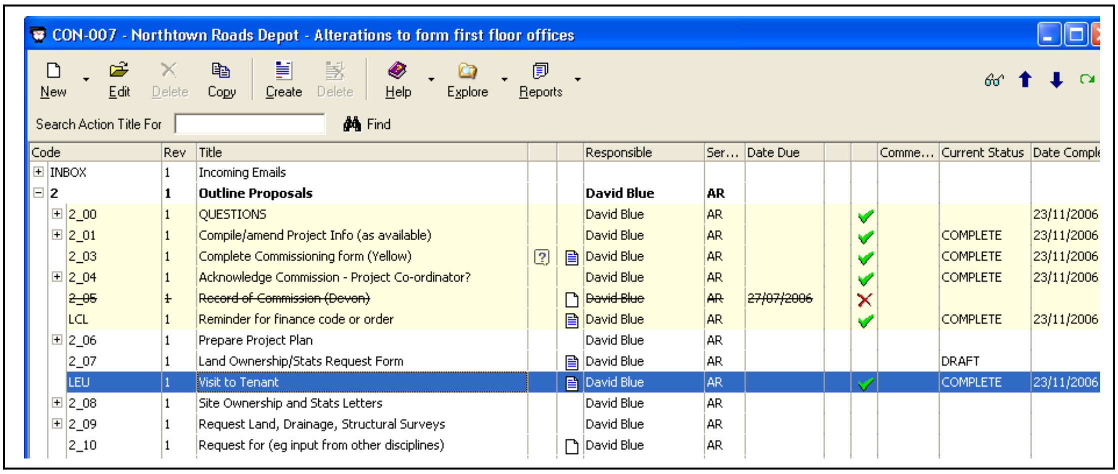
The advantages over just using Word outside Workflow are:

- *The name and address of the tenant and the project details are already populated*
- *The letter is automatically filed in the project directory*
- *The letter is available to all others involved in the project*

Step 2 – Complete the letter



Step 3 – The letter is automatically filed



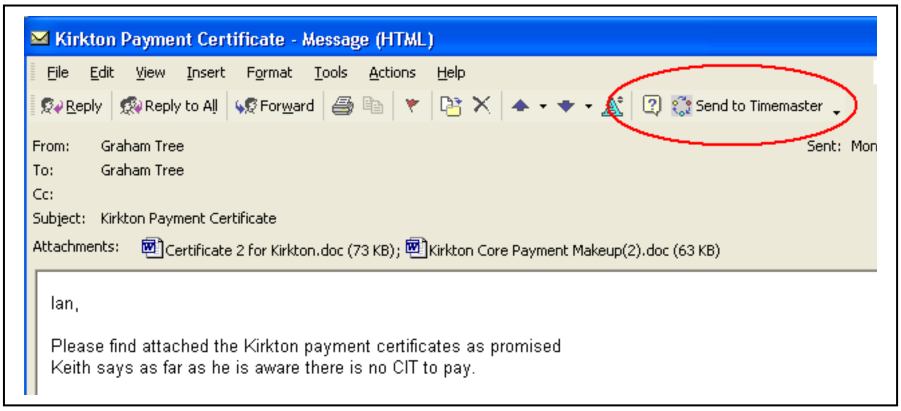
The same technique would be used to add project documentation which has been created outside of workflow to the checklist.

Filing E-mails

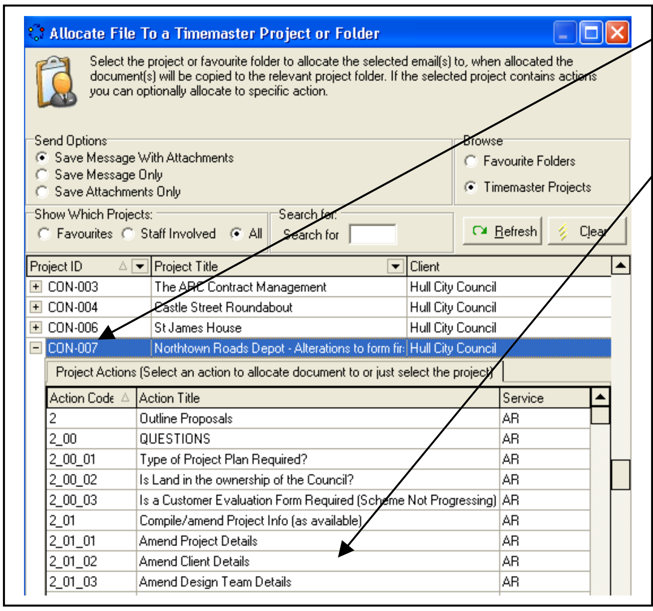
Incoming and outgoing e-mails may also be filed into the checklist if you are using Outlook or Lotus Notes. This process extracts the e-mail and any attachments and keeps a copy in the project folder. The e-mail may then be deleted from the Outlook database.

The process is the same for incoming and outgoing e-mails.

From within Outlook and additional button is added to the toolbars.



Multiple messages may be filed in one go from the messages list view or from within the message itself. Clicking on the **Send to Timemaster** button opens a project selector window.



Selecting a project only will attach the email to the **INBOX** or **OUTBOX** action.

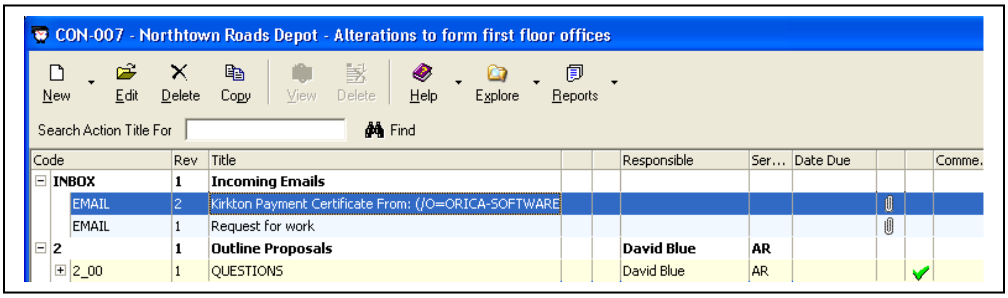
Selecting an action within the project will attach the email to the selected action

Save Messages with Attachments
Both the message and any attachments will be copied to the projects folder

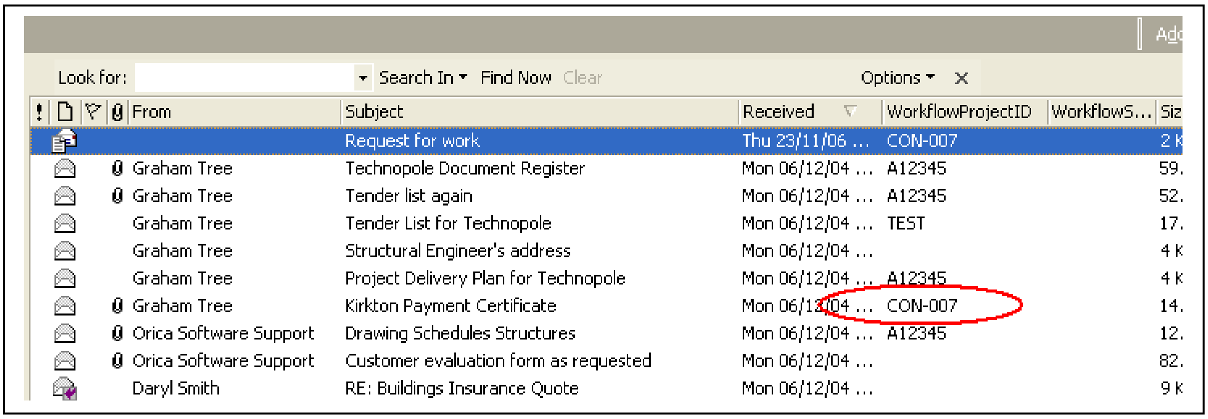
Save Message Only
Only the message file is copied to the projects folder

Save Attachments Only
Only the attachments are copied

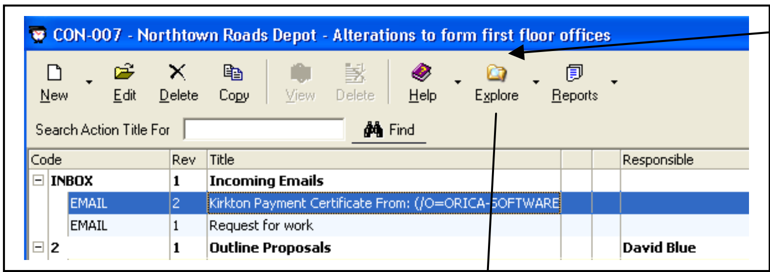
The e-mail filed in the project checklist, in this case, under the **INBOX** action.

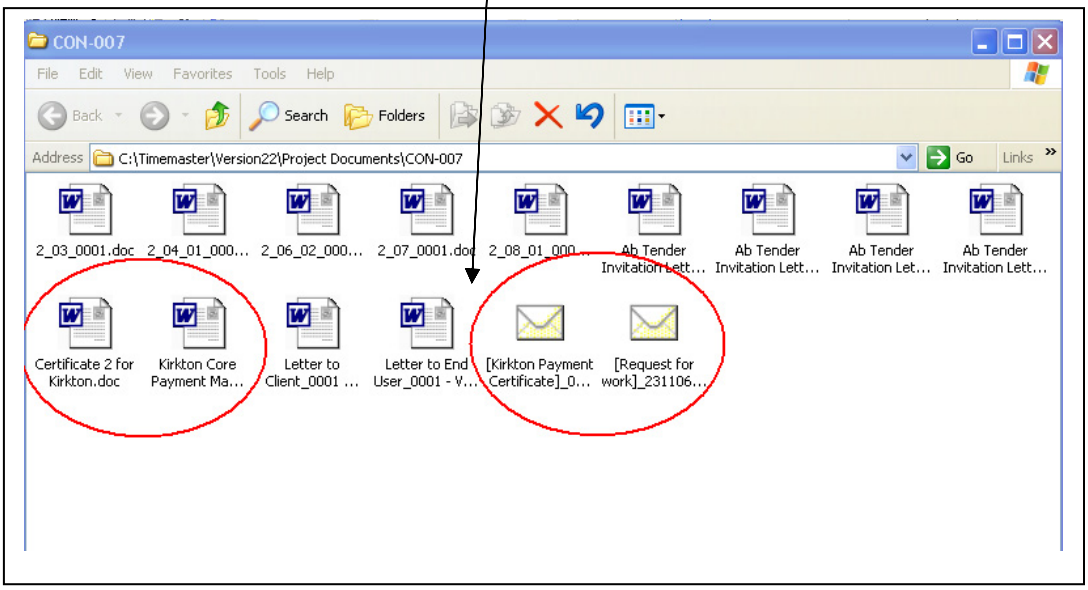


Back in Outlook, one of the user-defined fields holds the Timemaster project id and action the email has been filed under.



The e-mail and attachments are filed in the projects folder automatically. Clicking the **Explore** button opens the project folder which contains all the e-mails and other workflow documents.





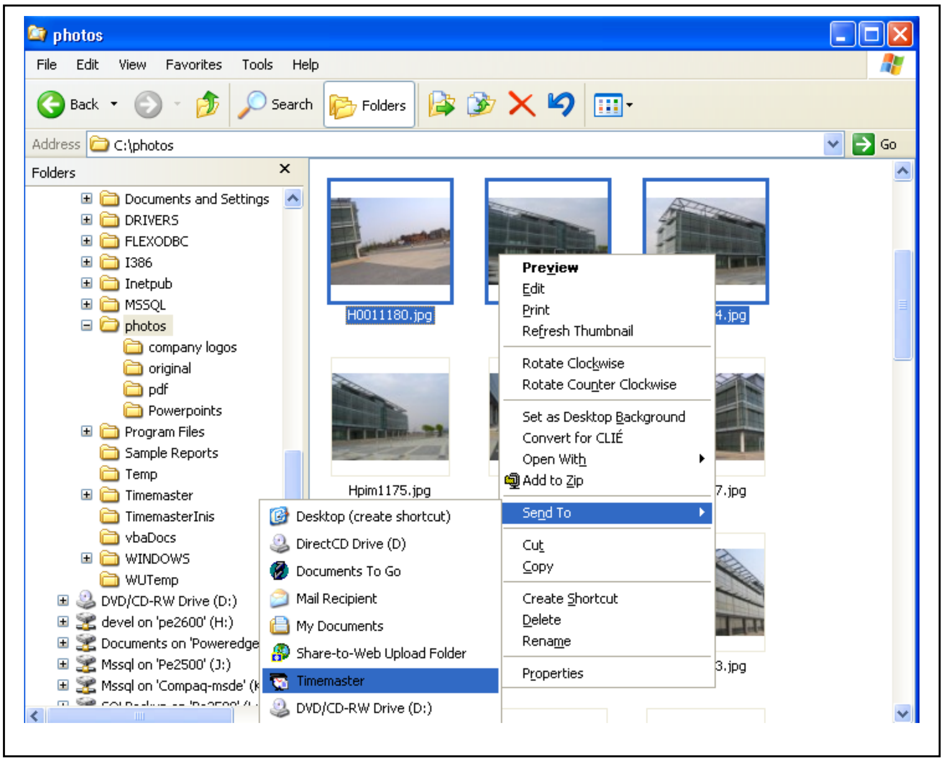
Attaching Files from Windows Explorer

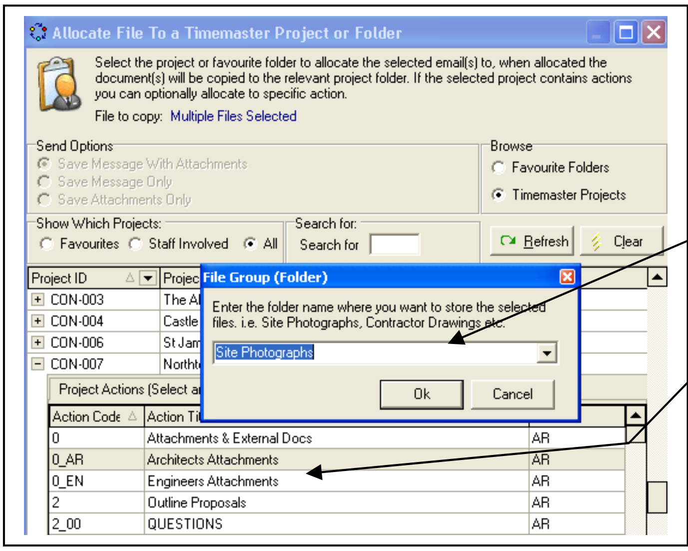
In addition to generating documents from within Workflow and importing existing documents, you can also attach any other file from Windows Explorer into the Workflow checklist. These could be any files received from external sources or scanners.

This example shows how pictures from a digital camera can be attached.

Most cameras deposit the pictures in a folder such as “My Pictures\Camera\Date\Pics”.

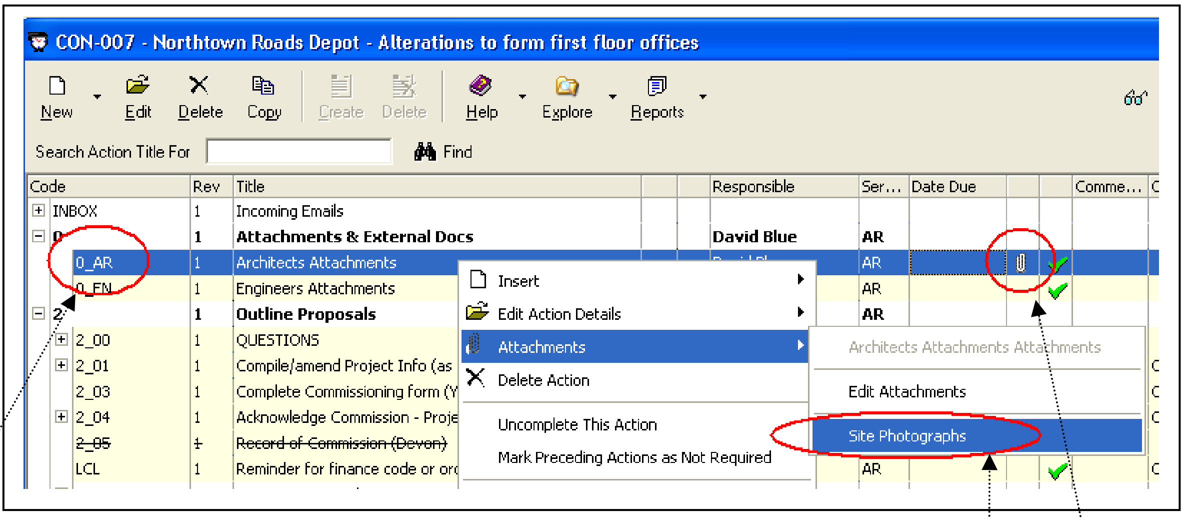
Photographs are filed by multi-selecting from within Windows Explorer, right-clicking and selecting the Send-to option, followed by the Timemaster option from the Send-to menu.





Attaching files from Windows Explorer brings up the same project selector that shown when attaching e-mails, except you can additionally enter a sub-folder in which to store the files.

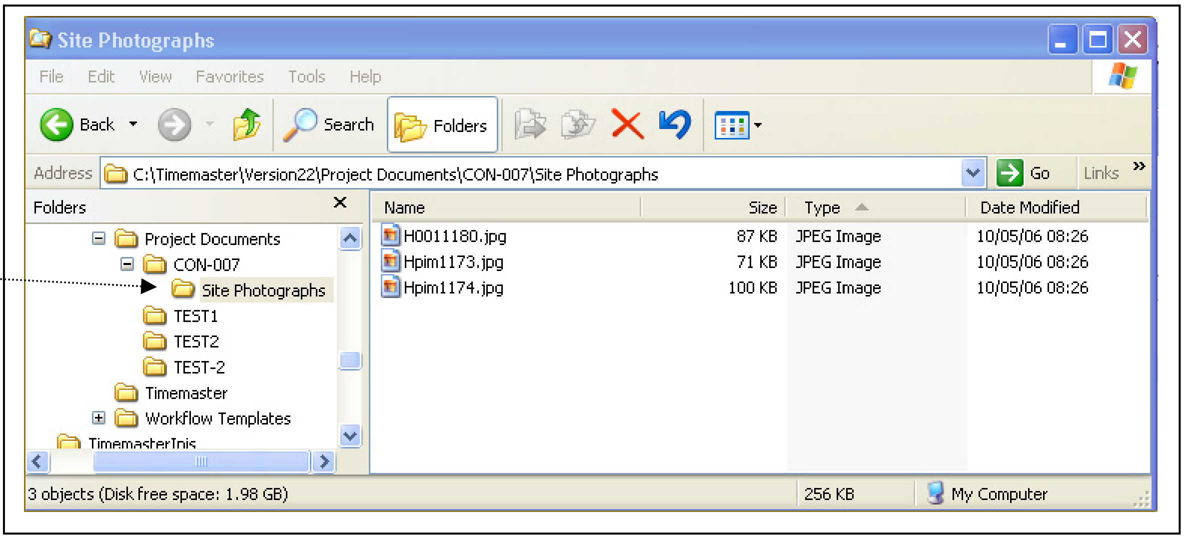
- Sub-folders make it easier to locate the file from the Explorer button.
- In this example, additional actions have been created as place-holders against which to attach external files. One for Architect sand one for Engineers.



The pictures are filed against the Architects Attachments action in the checklist.

The pictures are filed in the sub-folder Site Photographs

The action code has an attachments icon to show there are files attached.



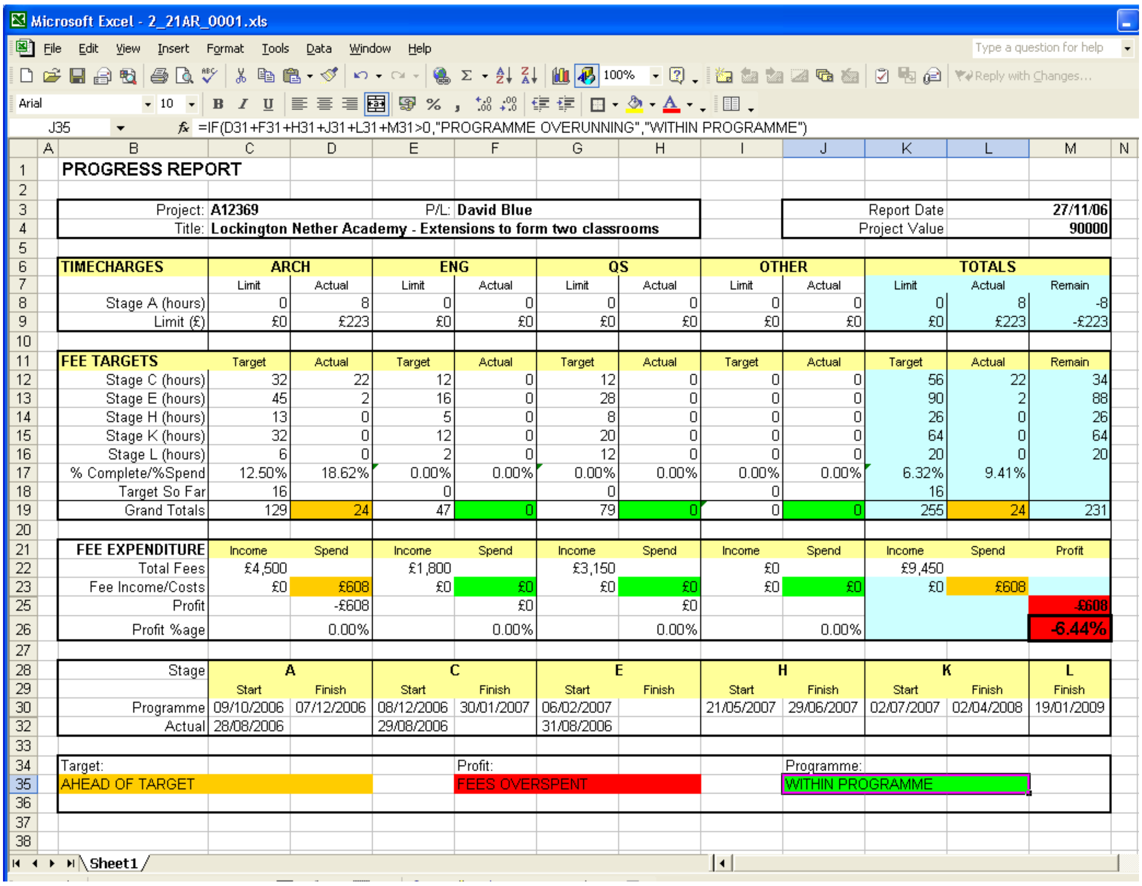
Custom Reporting

The example sheet below illustrates how Workflow could be used to provide a custom report.

Using the calculation facilities of Excel, Workflow tags have been embedded in a spreadsheet containing details of fees, targets and expenditure. Excel uses those to report under or overspend and colour the cells accordingly according to whether the project is within target or not.

This illustrates a number of features:

- Workflow works equally well with Excel documents
- Reports can be embedded in the checklist along with all other project documents
- Reports may be requested on demand by professional and copies at key points within the project may be frozen



Microsoft Excel - 2_21AR_0001.xls

J35 =IF(D31+F31+H31+J31+L31+M31>0,"PROGRAMME OVERUNNING","WITHIN PROGRAMME")

	B	C	D	E	F	G	H	I	J	K	L	M
1	PROGRESS REPORT											
2												
3	Project:	A12369		P/L:	David Blue					Report Date		27/11/06
4	Title:	Lockington Nether Academy - Extensions to form two classrooms								Project Value		90000
5												
6	TIMECHARGES	ARCH		ENG		QS		OTHER		TOTALS		
7		Limit	Actual	Limit	Actual	Limit	Actual	Limit	Actual	Limit	Actual	Remain
8	Stage A (hours)	0	8	0	0	0	0	0	0	0	8	-8
9	Limit (£)	£0	£223	£0	£0	£0	£0	£0	£0	£0	£223	-£223
10												
11	FEE TARGETS	Target	Actual	Target	Actual	Target	Actual	Target	Actual	Target	Actual	Remain
12	Stage C (hours)	32	22	12	0	12	0	0	0	56	22	34
13	Stage E (hours)	45	2	16	0	28	0	0	0	90	2	88
14	Stage H (hours)	13	0	5	0	8	0	0	0	26	0	26
15	Stage K (hours)	32	0	12	0	20	0	0	0	64	0	64
16	Stage L (hours)	6	0	2	0	12	0	0	0	20	0	20
17	% Complete/%Spend	12.50%	18.62%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	6.32%	9.41%	
18	Target So Far	16		0		0		0		16		
19	Grand Totals	129	24	47	0	79	0	0	0	255	24	231
20												
21	FEE EXPENDITURE	Income	Spend	Income	Spend	Income	Spend	Income	Spend	Income	Spend	Profit
22	Total Fees	£4,500		£1,800		£3,150		£0		£9,450		
23	Fee Income/Costs	£0	£608	£0	£0	£0	£0	£0	£0	£0	£608	
25	Profit		-£608		£0		£0					-£608
26	Profit %age		0.00%		0.00%		0.00%		0.00%			-6.44%
27												
28	Stage	A		C		E		H		K		L
29		Start	Finish	Start	Finish	Start	Finish	Start	Finish	Start	Finish	Finish
30	Programme	09/10/2006	07/12/2006	08/12/2006	30/01/2007	06/02/2007		21/05/2007	29/06/2007	02/07/2007	02/04/2008	19/01/2009
32	Actual	28/08/2006		29/08/2006		31/08/2006						
33												
34	Target:				Profit:				Programme:			
35	AHEAD OF TARGET				FEES OVERSPENT				WITHIN PROGRAMME			
36												
37												
38												

Sheet1

Document Search

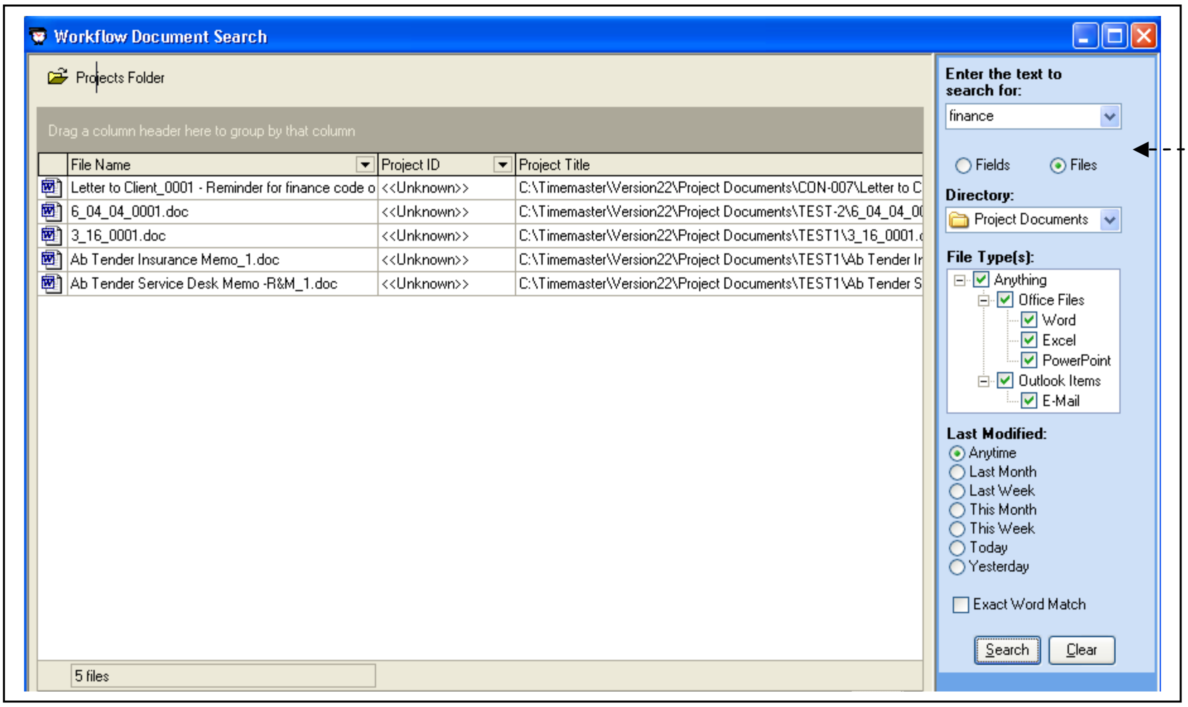
Timemaster Workflow contains a document search facility.

The search facility finds documents by searching on project, action and document titles and can also carry out searches based on the document content. The document search can search all project folders and sub-folders if required.

This is useful for a number of reasons.

- To search for a lost document
- To find a document used for a similar purpose on another project
- To find all documents addressed to a specific person.

Once a document is found, double-clicking it will open the document.



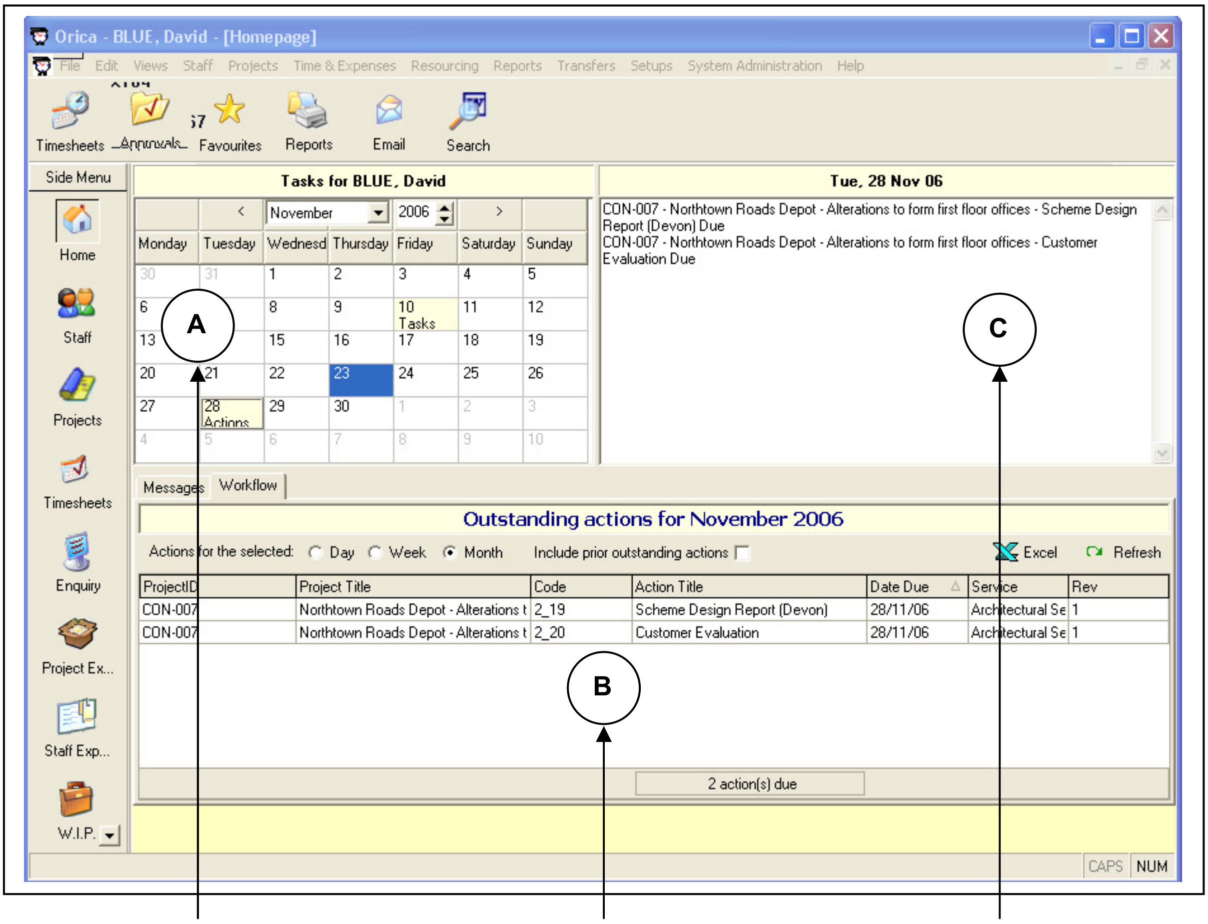
The search type, Fields or Files defines whether you search only fields and titles (Fields) or a full text search on all documents from a selected folder (Files).

Searching Fields is quickest but will only search project and action titles.
Searching Files will take longer as it searches document text

In the above example, 5 documents have been found containing the word “Finance” in the body of the document. The documents relate to a number of projects.

Opening the Checklist from the User's Home Page

The Workflow module adds a new tabbed page to the messages section of the home page and includes actions in the calendar. The actions that are included are defined by the systems implementer when designing the checklist contents.



The calendar area contains a shaded day for each action which is your responsibility occurring on that day.

Only actions defined to appear in the calendar will be shown.

The Workflow page contains a list of all actions due for either the selected day (that you have selected in the calendar), or week or month.

Click the day, week or month you wish to view.

The right-hand panel shows a description of the action currently highlighted.

Click on a shaded day to view the actions due on that day.

To cut down on the number of actions appearing in the calendar, there is a setting on each action code that determines whether it is included or not.

The actions shown in the outstanding actions due list (C) provide a quick entry point to the checklist associated with the action's project. This allows project managers and users to quickly view the actions due in the current week or month and jump straight to the project in order to process them by double-clicking on the selected action.