

Timemaster Workflow Product Overview

Issue Date: November 2006

Orica Software Systems Ltd.
24 Marina Court
Castle Street
Kingston-upon-Hull
East Riding of Yorkshire
HU1 1TJ
Tel: 01482 218318
Fax: 01482 216062
www.orica-software.co.uk

Table of Contents

Introduction 3
The Project Checklist..... 4
Populating Documents 5
Creating Non Standard Documents..... 6
Filing E-mails 8
Attaching Files from Windows Explorer..... 10
Custom Reporting..... 12
Document Search..... 13
Opening the Checklist from the User's Home Page..... 14

Document Status

Version	Issue Date	Comments
1.0	31/07/06	

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.

Code	Rev	Title	Responsible	Ser...	Date Due	Comme...	Current Status	Date Complete
INBOX	1	Incoming Emails						
EMAIL	1	Request for work						
2	1	Outline Proposals	David Blue	AR				
2_00	1	QUESTIONS	David Blue	AR		✓		23/11/2006
2_01	1	Compile/amend Project Info (as available)	David Blue	AR		✓	COMPLETE	23/11/2006
2_03	1	Complete Commissioning Form (Yellow)	David Blue	AR		✓	COMPLETE	23/11/2006
2_04	1	Acknowledge Commission - Project Co-ordinator?	David Blue	AR		✓	COMPLETE	23/11/2006
2_05	1	Record of Commission (Devon)	David Blue	AR	27/07/2006	✗		
LCL	1	Reminder for finance code or order	David Blue	AR		✓	COMPLETE	23/11/2006
2_06	1	Prepare Project Plan	David Blue	AR				
2_06_01	1	Prepare Project Plan (Complex)	David Blue	AR		✗		
2_06_02	1	Prepare Project Plan (Simple)	David Blue	AR	27/07/2006	⚠		
2_06_03	1	Project Plan - accompanying memo/letter...	David Blue	AR		📄	DRAFT	
2_07	1	Land Ownership/Stats Request Form	David Blue	AR				
2_08	1	Site Ownership and Stats Letters	David Blue	AR				
2_09	1	Request Land, Drainage, Structural Surveys	David Blue	AR				
2_10	1	Request for (eg input from other disciplines)	David Blue	AR				
2_11	1	Request Asbestos Survey	David Blue	AR				
2_12	1	Carry out CDM: Stage 2 Activities (checklist)	David Blue	AR				
2_13	1	Drawing/Document Register	David Blue	AR				
2_14	1	Hold Design Team Meeting (if required) Agenda	David Blue	AR				
2_15	1	Request Report and Estimate	David Blue	AR	27/07/2006	⚠		
2_18	1	Compile Feasibility Study Report	David Blue	AR	27/07/2006	⚠		
2_19	1	Scheme Design Report (Devon)	David Blue	AR	04/09/2006	⚠		
2_20	1	Customer Evaluation	David Blue	AR	04/09/2006	⚠		
3	1	Detailed Proposals	David Blue	AR				
4	1	Tender Action	David Blue	AR				

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.

The screenshot shows a Microsoft Word document titled '2_04_01.doc' with a sidebar on the left containing a tree view of tags. The tags are organized into categories: ACTION, CLIENT, CONTRACTS, EXTERNAL, and PROJECTS. The PROJECTS category is expanded to show sub-categories: 0 - Project Header, 1 - Work Detail, 2 - Additional, 3 - Values, 4 - Notes, 5 - Lead Information, 6 - Fees and Costs, and 7 - User Fields. The main document area shows a letterhead for 'Kirklees Design and Property Service' and a letter body. Several tags are embedded in the document, such as <<PROJECTID>>, <<PROJECT_TITLE>>, <<CLIENT_CONTACT>>, <<PROJECT_LEADER_NAME>>, and <<PROJECT_LEADER_TEL>>. Arrows point from the tag categories in the sidebar to their corresponding locations in the document. Below the screenshot are three boxes with text: 'The workflow tag program' (pointing to the sidebar), 'Your standard quality documents' (pointing to the document content), and 'Drag the tags into the correct locations in your documents' (pointing to the document content).

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

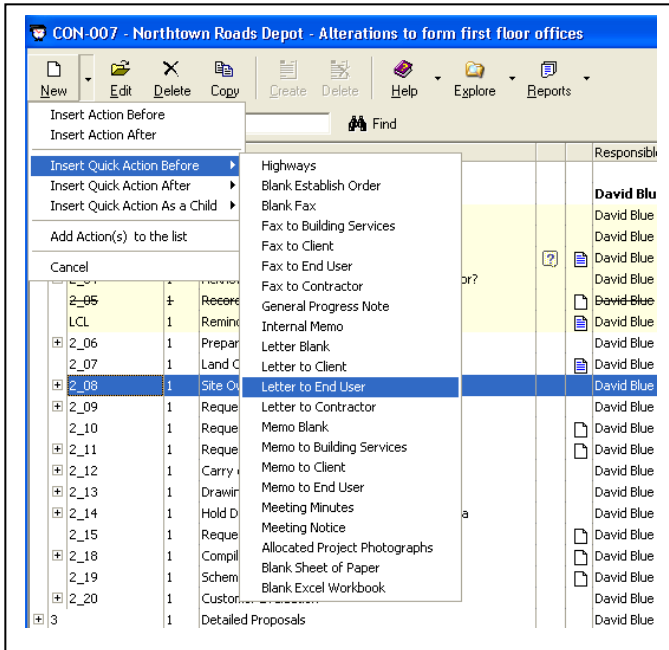
You may now also add your own fields (user fields) into the Timemaster database and include these in your documents as well.

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)

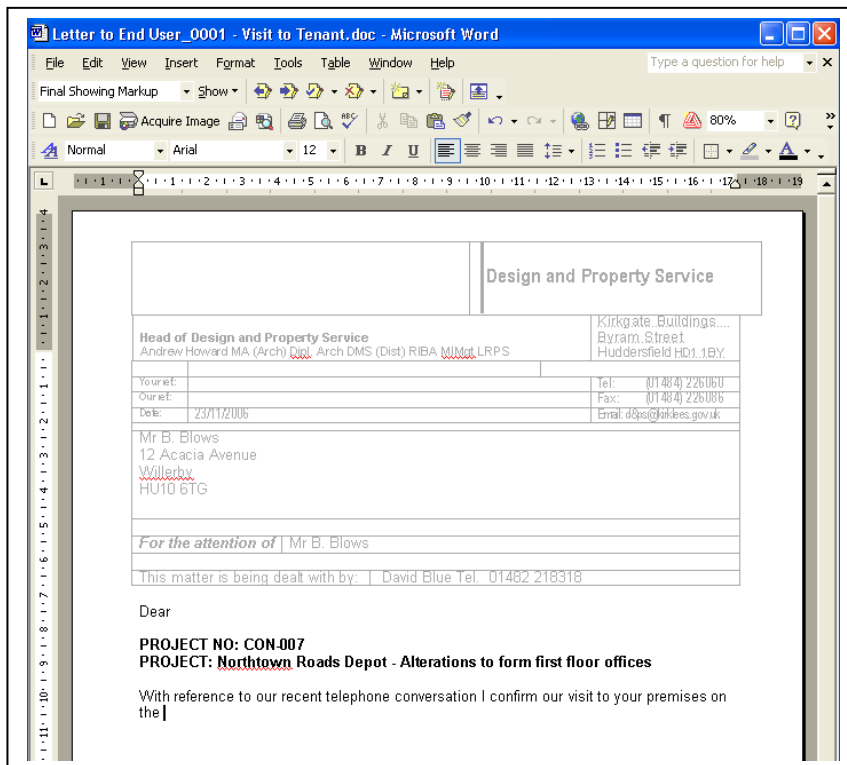


This will create a document based on a “Letter to End User” template and place it before the 2_08 action.

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

Code	Rev	Title	Responsible	Ser...	Date Due	Comme...	Current Status	Date Compl
INBOX	1	Incoming Emails						
2	1	Outline Proposals	David Blue	AR				
2_00	1	QUESTIONS	David Blue	AR		✓		23/11/2006
2_01	1	Compile/amend Project Info (as available)	David Blue	AR		✓	COMPLETE	23/11/2006
2_03	1	Complete Commissioning form (Yellow)	David Blue	AR		✓	COMPLETE	23/11/2006
2_04	1	Acknowledge Commission - Project Co-ordinator?	David Blue	AR		✓	COMPLETE	23/11/2006
2_05	1	Record-of-Commission (Deven)	David Blue	AR	27/07/2006	✗		
LCL	1	Reminder for finance code or order	David Blue	AR		✓	COMPLETE	23/11/2006
2_06	1	Prepare Project Plan	David Blue	AR				
2_07	1	Land Ownership/Stats Request Form	David Blue	AR			DRAFT	
LEU	1	Visit to Tenant	David Blue	AR		✓	COMPLETE	23/11/2006
2_08	1	Site Ownership and Stats Letters	David Blue	AR				
2_09	1	Request Land, Drainage, Structural Surveys	David Blue	AR				
2_10	1	Request for (eg input from other disciplines)	David Blue	AR				

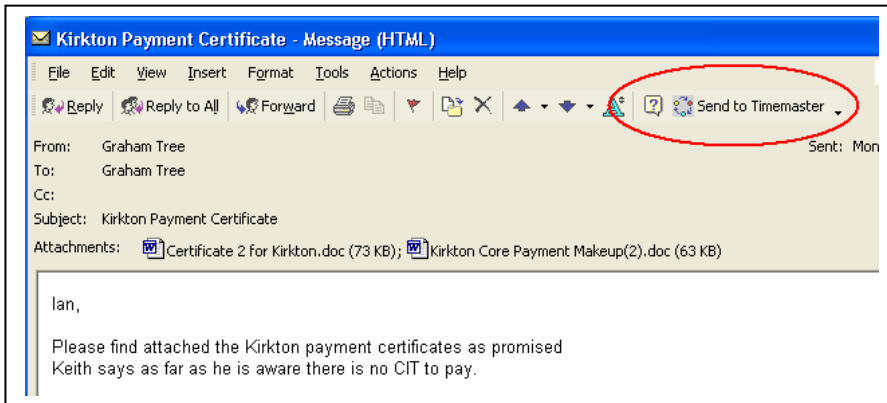
The same technique would be used to add project documentation which has been created outside of workflow to the checklist.

Filing E-mails

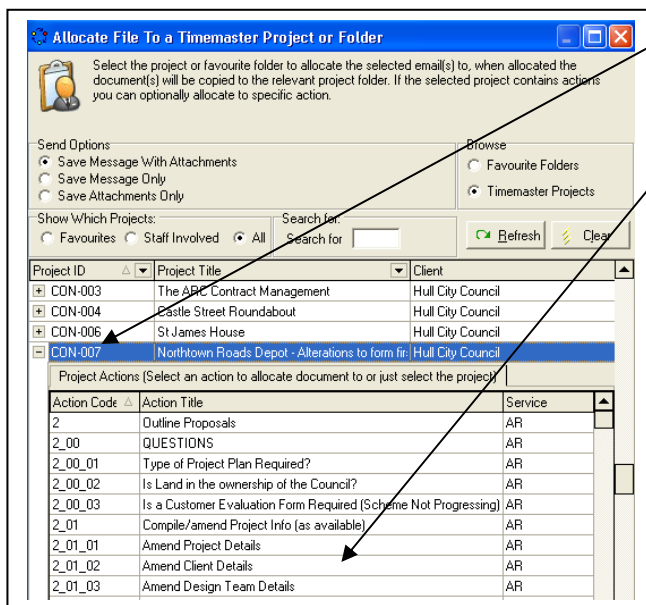
Incoming and outgoing e-mails may also be filed into the checklist if you are using Outlook or Lotus Notes. This process extracts the e-mail and any attachments and keeps a copy in the project folder. The e-mail may then be deleted from the Outlook database.

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.

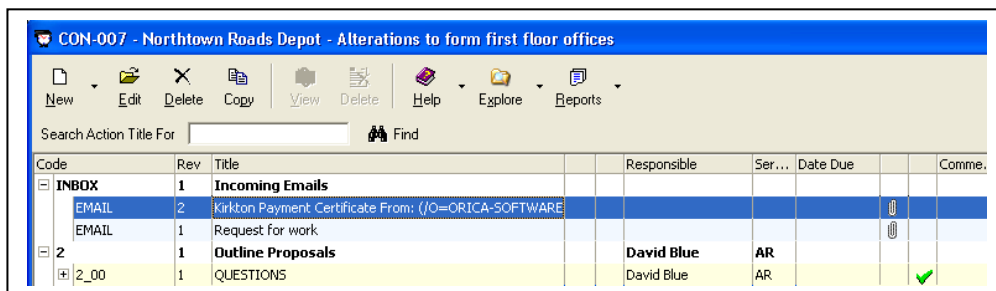
Selecting an action within the project will attach the email to the selected action

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

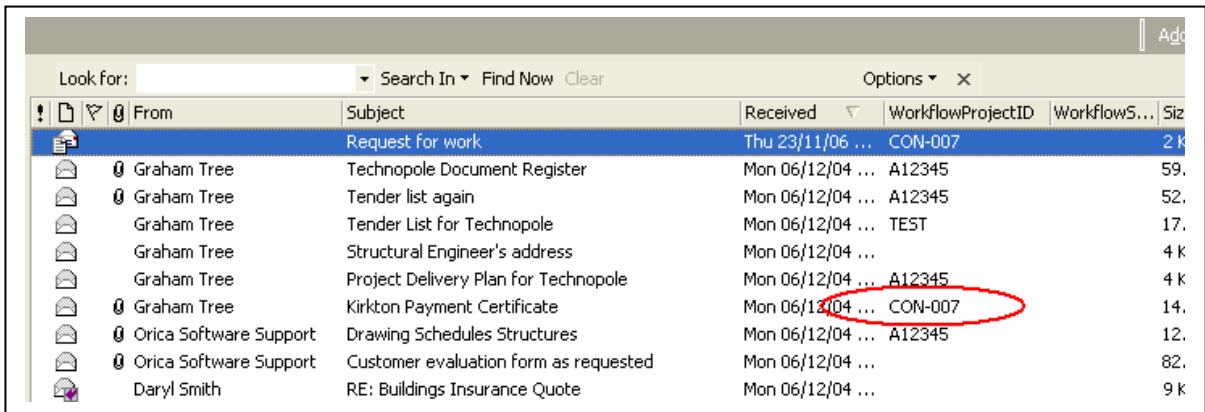
Save Message Only
Only the message file is copied to the projects folder

Save Attachments Only
Only the attachments are copied

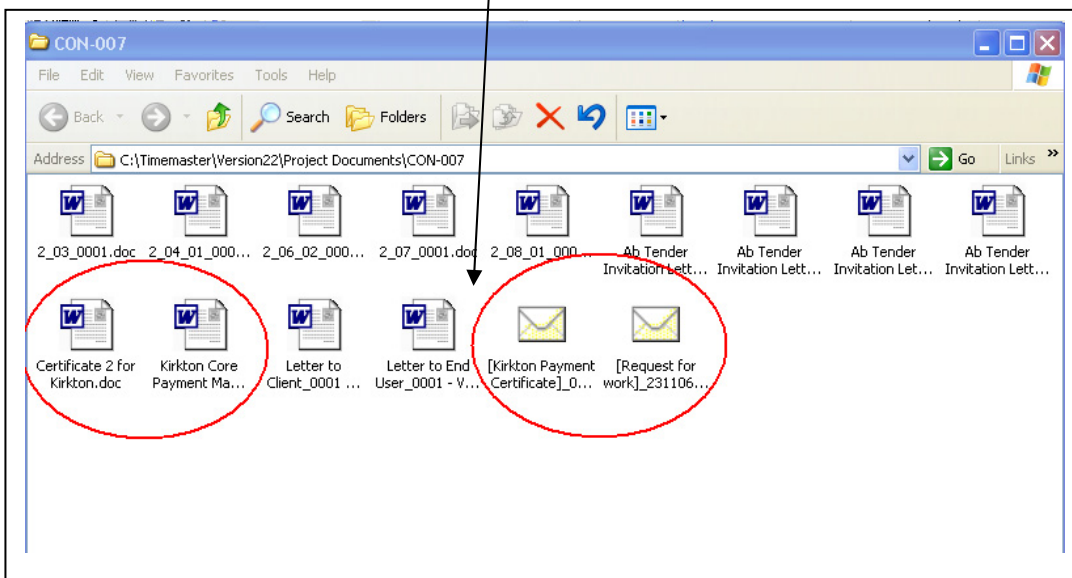
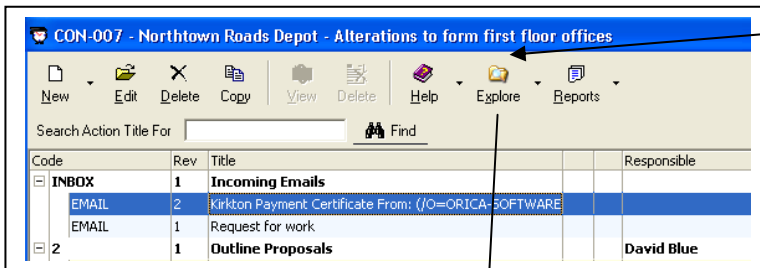
The e-mail filed in the project checklist, in this case, under the **INBOX** action.



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.



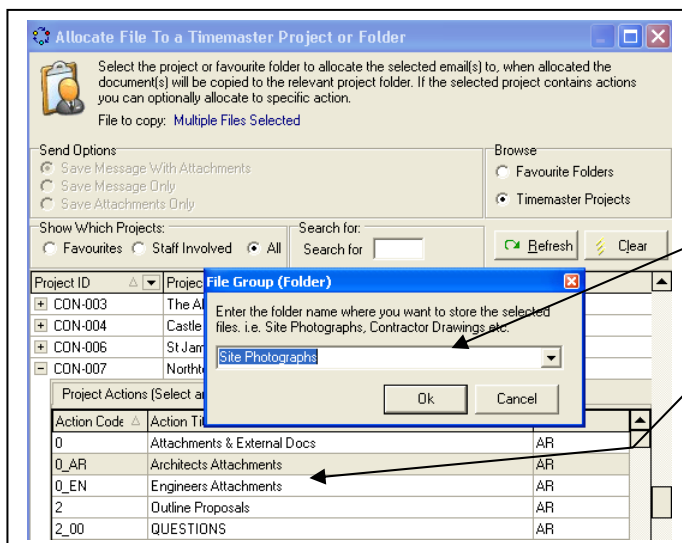
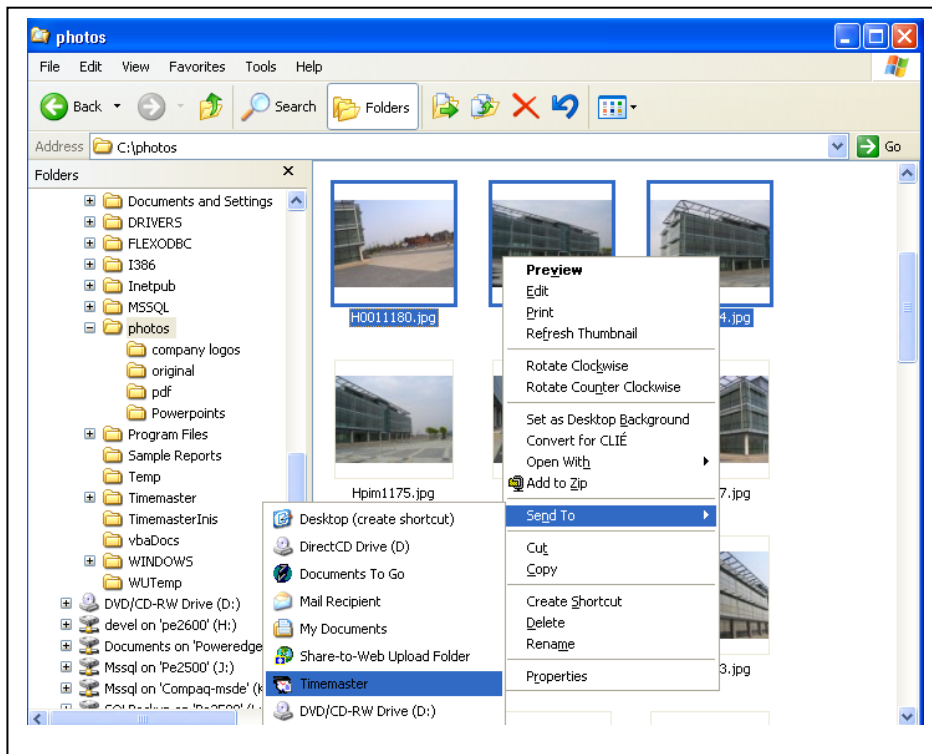
Attaching Files from Windows Explorer

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”.

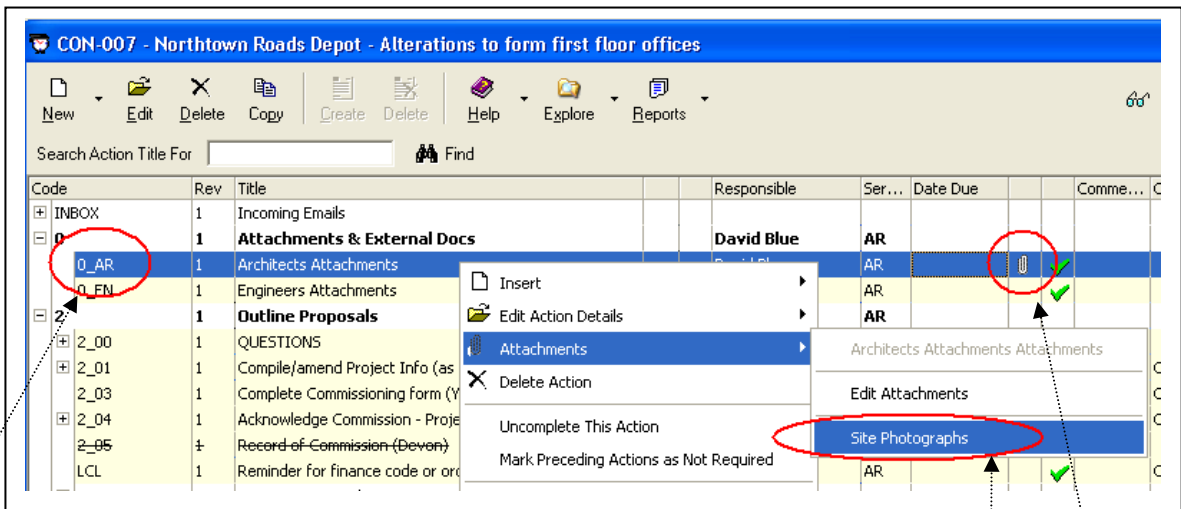
Photographs are filed by multi-selecting from within Windows Explorer, right-clicking and selecting the Send-to option, followed by the Timemaster option from the Send-to menu.



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.

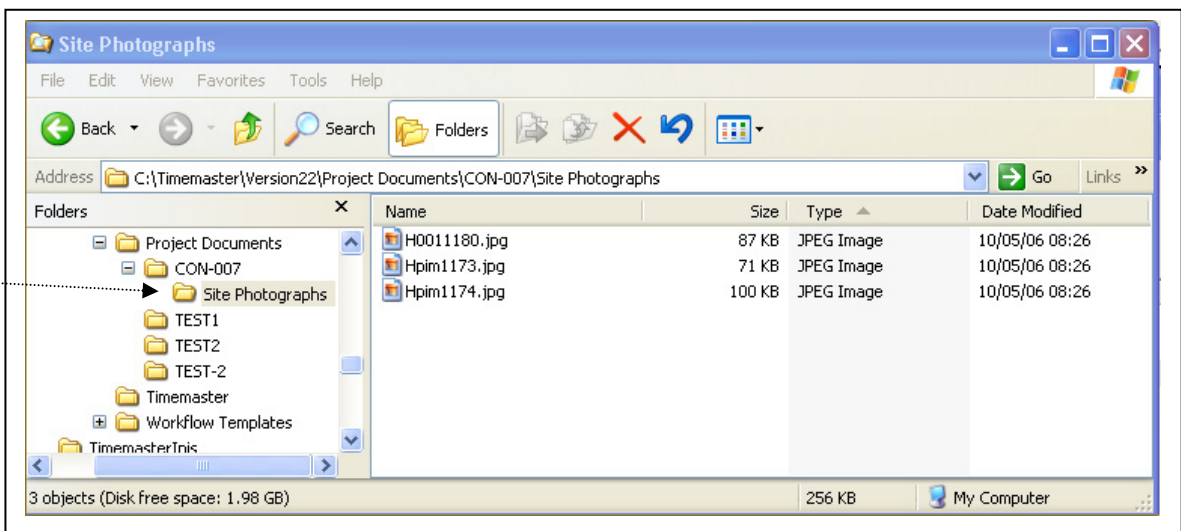
In this example, additional actions have been created as place-holders against which to attach external files. One for Architect sand one for Engineers.



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

The screenshot shows an Excel spreadsheet titled 'Microsoft Excel - 2_21AR_0001.xls'. The main content is a 'PROGRESS REPORT' for Project A12369, 'Lockington Nether Academy - Extensions to form two classrooms'. The report is organized into several sections:

- Project Information:** Project: A12369, P/L: David Blue, Report Date: 27/11/06, Project Value: 90000.
- TIMECHARGES:** A table with columns for ARCH, ENG, QS, OTHER, and TOTALS. Rows include Stage A (hours) and Limit (£). Values are shown for Limit and Actual.
- FEE TARGETS:** A table with columns for Target and Actual. Rows include Stage C, E, H, K, L (hours) and % Complete/% Spend. Values are shown for Target and Actual.
- FEE EXPENDITURE:** A table with columns for Income, Spend, and Profit. Rows include Total Fees, Fee Income/Costs, Profit, and Profit %age. Values are shown for Income, Spend, and Profit.
- Summary:** A table with columns for Stage (A, C, E, H, K, L) and rows for Start, Finish, and Actual dates. Below this, a 'Target:' row shows 'AHEAD OF TARGET' (yellow), 'FEES OVERSPENT' (red), and 'WITHIN PROGRAMME' (green).

Document Search

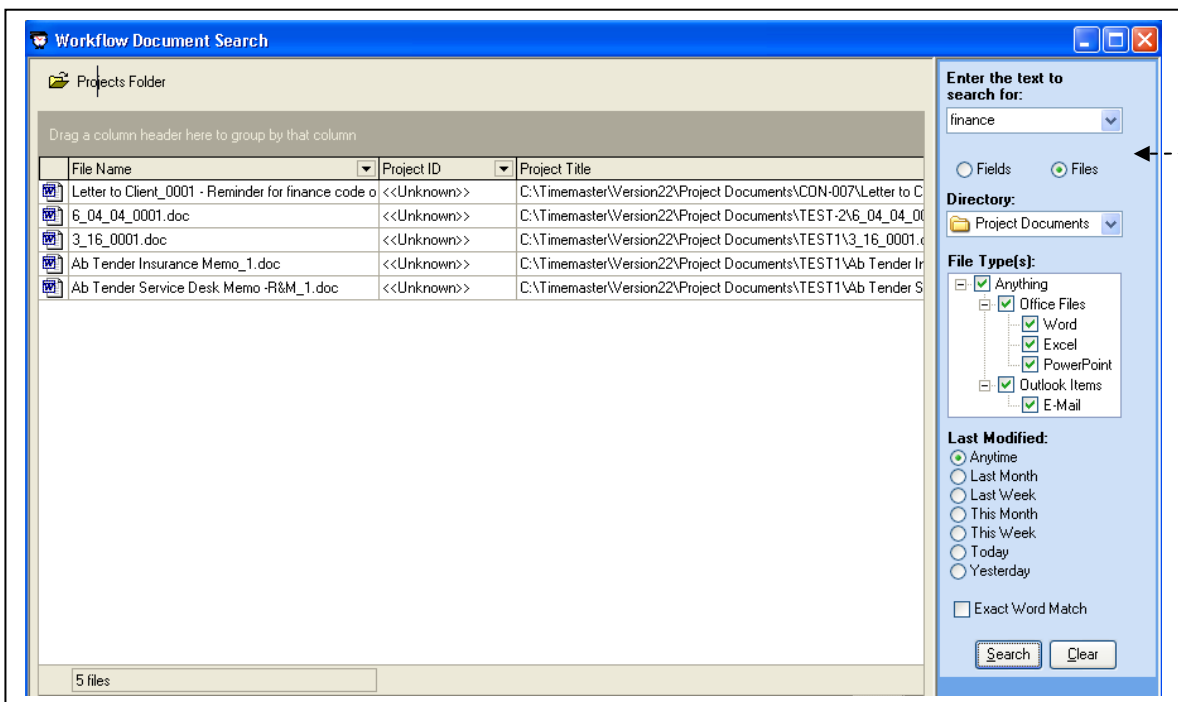
Timemaster Workflow contains a document search facility.

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 screenshot shows the Orica software interface for user BLUE, David. The main window is titled 'Orica - BLUE, David - [Homepage]'. The interface includes a menu bar (File, Edit, Views, Staff, Projects, Time & Expenses, Resourcing, Reports, Transfers, Setups, System Administration, Help) and a toolbar with icons for Timesheets, Approvals, Favourites, Reports, Email, and Search. A side menu on the left contains icons for Home, Staff, Projects, Timesheets, Enquiry, Project Ex..., Staff Exp..., and W.I.P.

The main content area is divided into several sections:

- Tasks for BLUE, David:** A calendar view for November 2006. The date '23' is highlighted in blue, and the date '28' is highlighted in yellow. A circled 'A' points to the '23'.
- Workflow:** A tabbed page showing a list of actions. A circled 'B' points to the 'Workflow' tab.
- Outstanding actions for November 2006:** A table with columns: ProjectID, Project Title, Code, Action Title, Date Due, Service, and Rev. Two actions are listed:

ProjectID	Project Title	Code	Action Title	Date Due	Service	Rev
CON-007	Northtown Roads Depot - Alterations to form first floor offices - Scheme Design Report (Devon) Due	2_19	Scheme Design Report (Devon)	28/11/06	Architectural Se	1
CON-007	Northtown Roads Depot - Alterations to form first floor offices - Customer Evaluation Due	2_20	Customer Evaluation	28/11/06	Architectural Se	1
- Right-hand panel:** A detailed view of the selected action, showing the text: 'CON-007 - Northtown Roads Depot - Alterations to form first floor offices - Scheme Design Report (Devon) Due' and 'CON-007 - Northtown Roads Depot - Alterations to form first floor offices - Customer Evaluation Due'. A circled 'C' points to this panel.

At the bottom of the workflow page, there is a summary bar that says '2 action(s) due'.

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.