

Application Brief

Spectrum Workflow



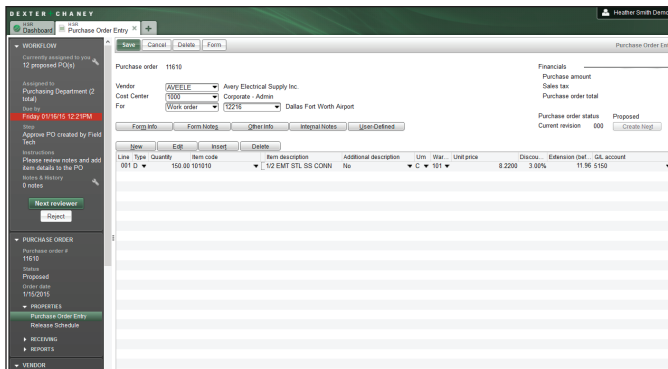
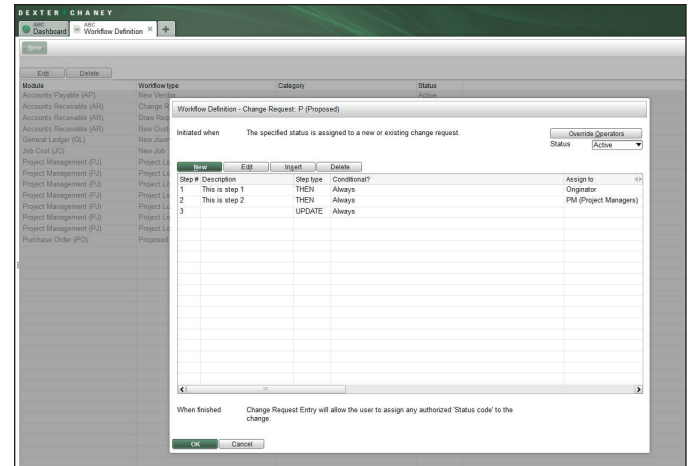
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OVERVIEW

The **Spectrum Workflow** feature allows users to define and enforce specific rules and tasks within Spectrum, creating automated, simple, streamlined processes for their organization. Workflow is fully-integrated into Spectrum and allows users to see all the steps currently assigned to them. They can quickly approve, reject, or mark each step that has been completed. The full history of each transaction processed through Workflow is always available.

Users can define the flow of data and decisions in ways that make sense to their organization's needs with **Spectrum Workflow**. Setting up workflows within Spectrum is simple and once the workflows are in place, tasks move efficiently from creation to conclusion, with all people that need to be involved alerted when their attention or action is needed. This provides a smooth movement of data within the organization, along with a powerful added layer of oversight to ensure that no data is overlooked and no tasks fall through the cracks.



Spectrum Workflow utilizes intelligent workflow technology, allowing tasks and approvals to be routed to specific people, groups or even defined roles within the organization. Tasks can be sequential or parallel, meaning that they can be sent to one person to approve before being sent on to the next person, or to an entire group where one member or all members need to complete the task, depending on how the workflow step is defined.

Workflow Info Bar

Spectrum Workflow integrates with the *Info Bar* in Spectrum, giving users their own *Workflow Info Bar* where they can stay on top of assigned tasks, approvals and other work.

Like other Spectrum info bars, the *Workflow Info Bar* is intuitive and allows the user to drill down into tasks and additional details without the need to jump to multiple screens or menus.

Dashboard App: My Current Workflow Assignments

Additionally, an easy-to-use application on users' Spectrum Dashboard, *My Current Workflow Assignments*, keeps the user up to date on any tasks that need to be addressed, overdue tasks, approvals that are needed, rejected items and more. Users can click on an item in the app and it will link directly to the appropriate screen where the actionable item needs to be addressed.

Easy to Use, Adaptable

Designed to power workflow and tasks behind the data, **Spectrum Workflow** provides users with a seamless experience. No significant learning curve or extra training is needed. Intelligent task “walk-throughs” give users an easy set of steps to follow with each task, much like a software “wizard.” **Spectrum Workflow** is ideal for new employees needing to quickly learn Spectrum.

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Spectrum Workflow is not only customizable to each organization, workflows can be easily changed or altered to address special needs or situations as they arise. Authorized users can also override pre-defined workflows or re-route tasks and approvals when needed.

Streamlined Processes with More Control, Oversight

With **Spectrum Workflow**, tasks and processes that once required multiple separate steps or having to access multiple modules to complete can now be addressed seamlessly. The automated routing and approval processes created by **Spectrum Workflow** shave valuable hours off of users' daily routines, freeing them up to address other important duties in the organization.

Assigned to contact	Status	Due in days	Workflow type	Category	Transaction	Step #	Step description	Due date	Status At
Overdue	Overdue	-279.25	Project Log					07/02/14 07:49 AM	
John B. Chaney	Overdue	-273.13	Proposed Purchase			1	Here is a step	07/01/14 10:21 AM	
Todd Day	Overdue	-265.13				1		07/01/14 01:08 PM	
Heather Smith	Overdue	-263.00						07/01/14 03:35 PM	
Gentley Felt	Overdue	-265.00						07/01/14 03:35 PM	
DANIEL JONES	Overdue	-214.00	Project Log	P.O. 15360		1	Here is a step	06/03/14 04:00 PM	
William Neal	Overdue	-206.25	Project Log	COUPE		1	Step 1	06/12/14 07:07 AM	
Hudson Griffin	Overdue	-204.33	Proposed Purchase			4	Service Manager Appr	05/14/14 05:19 AM	F
Chad Vahos	Overdue	-188.25	Project Log			1		10/30/14 07:39 AM	
SCOTT SHAL LEGGO	Overdue	-168.21						10/30/14 08:03 AM	
Nick Steier	Overdue	-153.50	Project Log	RFI	Job 300, RFI 81	1		11/03/14 03:31 PM	
Mark Schwartz	Overdue	-146.04	Project Log	RFI	Job 300, RFI 81	1	Architect Review	11/01/14 12:15 PM	F
JUDY	Overdue	-145.88	Project Log	RFI	Job 300, RFI 82	3	Subcontractor Review	11/01/14 04:28 PM	F
Rob Jones	Overdue	-105.50	Project Log	SUBMITTAL	Job 325, SUBMITTAL		Provide Completed S	11/11/14 03:33 PM	Receipt
Jason Shennet	Overdue	-72.96	New Vendor					01/23/15 02:33 PM	
Brian Mathews	Overdue	-42.00	Change Request	Status P (Pri)		1	addtocheckoff	02/23/15 11:34 AM	Job contact
Charles Charleston	Overdue	-42.00	Change Request	Status P (Pri)		1	addtocheckoff	02/23/15 11:34 AM	Job contact
Donald Rudgman	Overdue	-42.00	Change Request	Status P (Pri)		1	addtocheckoff	02/23/15 11:34 AM	Job contact
John B Chaney	Overdue	-42.00	Change Request	Status P (Pri)		1	addtocheckoff	02/23/15 11:34 AM	Job contact
Sally Green	Overdue	-42.00	Change Request	Status P (Pri)		1	addtocheckoff	02/23/15 11:34 AM	Job contact
Jane Schmees	Overdue	-41.96	Change Request	Status P (Pri)		1	addtocheckoff	02/23/15 02:17 PM	Job contact
Jon Schmees M	Overdue	-41.96	Change Request	Status P (Pri)		1	addtocheckoff	02/23/15 02:17 PM	Job contact
John Riendeau	Overdue	-41.96	Change Request	Status P (Pri)		1	addtocheckoff	02/23/15 02:17 PM	Job contact
Vicky Month	Overdue	-31.04	Project Log	RFI	Job 300, RFI 89	3	Subcontractor Review	03/04/15 02:04 PM	F
	Overdue	-20.00	New Vendor			1	Add information on M	01/30/15 03:08 PM	C

Spectrum Workflow also creates detailed audit trails within the organization by date- and time-stamping tasks and approvals so that any actionable item can be recalled whenever needed. This ensures that tasks and processes are not just completed when they need to be, but that the user can document them as well. Users also have the ability to add notes to tasks, explaining why certain actions were taken or why an item was approved or denied.



Features:

- + Intelligent task approval process
- + Workflow alerts via Spectrum Dashboard include notifications of new tasks, overdue tasks and more
- + User-defined steps ensure tasks and processes are handled the way organizations want
- + Tasks and approvals can be sequential or parallel, meaning the task is sent to one person to approve or a group of people who all need to approve
- + Groups and subgroups can be set up where anyone can address and/or approve a task
- + Tasks can be routed to a specific person, role or defined group
- + Date and time stamp on tasks creates detailed audit trails
- + Authorized users can have workflow management abilities where they can override predefined workflows or re-route tasks when needed
- + Users have the ability to add notes with tasks, explaining why certain decisions were made or how specific tasks were addressed when approving or denying
- + Users have their own *Workflow Info Bar* in Spectrum, which integrates with the *Spectrum Info Bar* to provide instant access to additional data when needed



Benefits:

- + Users have better control and oversight over tasks throughout Spectrum to ensure that nothing is overlooked or no tasks fall through the cracks
- + Provides greater consistency in day-to-day operations by streamlining tasks in Spectrum, saving time and effort
- + Creates a trusted audit trail with date and time stamps connected to completed tasks, protecting users when issues or conflict arise
- + Task walkthroughs give employees an easy set of steps to follow—ideal for new employees needing to ramp up in Spectrum quickly
- + Integration with the Spectrum Info Bar gives users all the data they need at their fingertips without having to navigate through multiple, separate menu systems
- + Workflows can be customized to fit each company's or user's needs
- + Flexibility allows workflows to be easily changed to handle the exceptions to every rule that can happen in the organization
- + Intelligent process schemes allow for routing of tasks to different individuals or groups based on set parameters such as cost, quantities, etc.