Rubix Software

E: info@rubixsoftware.co.uk

W: www.rubixsoftware.co.uk

Connect

Dynamic work request system

Contents

About

What is Connect?

Connect is a dynamic web portal which is designed to connect seamlessly to Visualfiles.

It is a web portal designed for use by staff within an organisation to

- Instruct their Legal Department to undertake work,
- When instructing, upload documents relating to their instructions
- View all cases instructed to see
    - The Milestones reached on the case
    - Any case information you want to present to the user
    - A history of the case
    - Any ledger information
    - The case to-do list
    - Send Messages to the case holder

Reporting dashboard to understand what the user or department has created; the milestone status and information on completed cases.

Dynamic at the core

We believe that you should be in control, so Connect is fully dynamic which means that

- Administrative users can create/edit and delete users who can have access to the portal
- Diverse levels of access can be set for each user so that they can either see and search for all cases or only cases which the user has created.
- It is easy for you to set what you want the user to see; for example, you can switch on the history page and remove the ledger in just one click.
- Connect will deal with the user access including forgotten password retrieval.
- Connect comes with a standard instruction template out of the box.

Designed with Visualfiles in mind

Connect works seamlessly and in real time with Visualfiles. This means that

- Once the user creates a case it will appear instantly in Visualfiles
- Data is read and displayed in the Portal from Visualfiles in real time
- Milestone information is obtained from Visualfiles and displayed in the portal

- Messages are sent in real time from Connect to Visualfiles and replies to messages will appear in Connect from Visualfiles.

Different work types

The beauty of Connect is that we provide out of the box a complete work forms generation wizard. This means you can create your own bespoke forms easily and quickly and associate these with the work types in your system.

All the information completed on these bespoke forms will be added into Visualfiles automatically when submitted.

Accessibility

Connect is tested against W3C standards to ensure that it meets the need for access with people with disabilities.

Under the hood, where the magic happens.

We have designed Connect to interact seamlessly with Visualfiles.

This means that ALL data within the portal can be changed by you from within Visualfiles using our Visualfiles scripting.

- ✓ What pages you display and how these are labelled.
- ✓ You can add and remove any data you want to make available from within Visualfiles.
- ✓ Want to display different data based on your work type; easy. Simply change the Visualfiles scripts and Connect will change instantly
- ✓ Split data into organised sections including group screens and calculated fields.
- ✓ Display ledger information and add/change exactly what you want to present.
- ✓ Display Schedules and add/change exactly what you want to present.
- ✓ Decide what columns of data you want to appear on the site from any field in your system.

As Visualfiles Connect is dynamic to the core then the possibilities are endless.

Screenshots

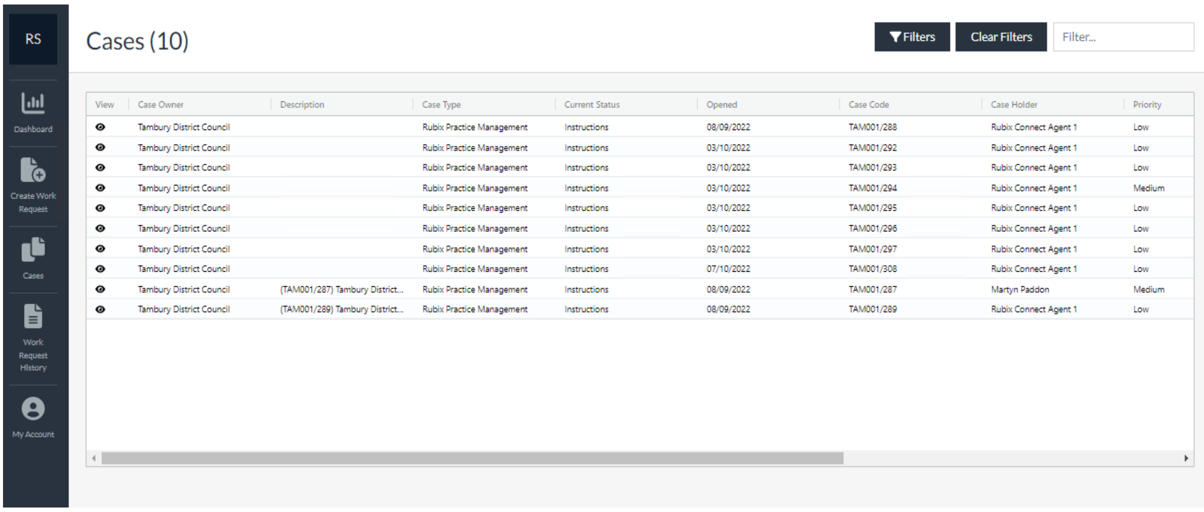
The following screens are examples of Connect. Remember that as the system is dynamic you can easily change any section you require to suit your exact needs.

Login

A typical login screen; the logos/images/branding styles are all configurable. You will note the user can undertake self-service for forgotten passwords.

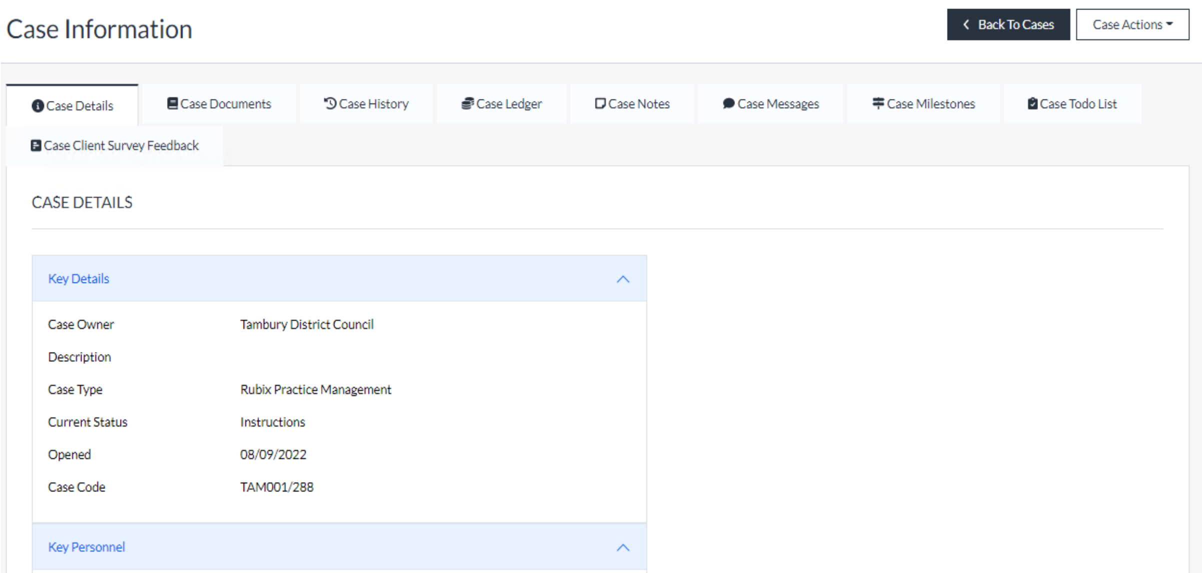
Viewing cases

Having logged in, I can see all the cases I have submitted with Connect. The screen includes easy searching facilities.



Case details

Once in a case I am presented with the tabs along the top to navigate to areas within the system. Visibility and naming of the tabs is controlled by you.

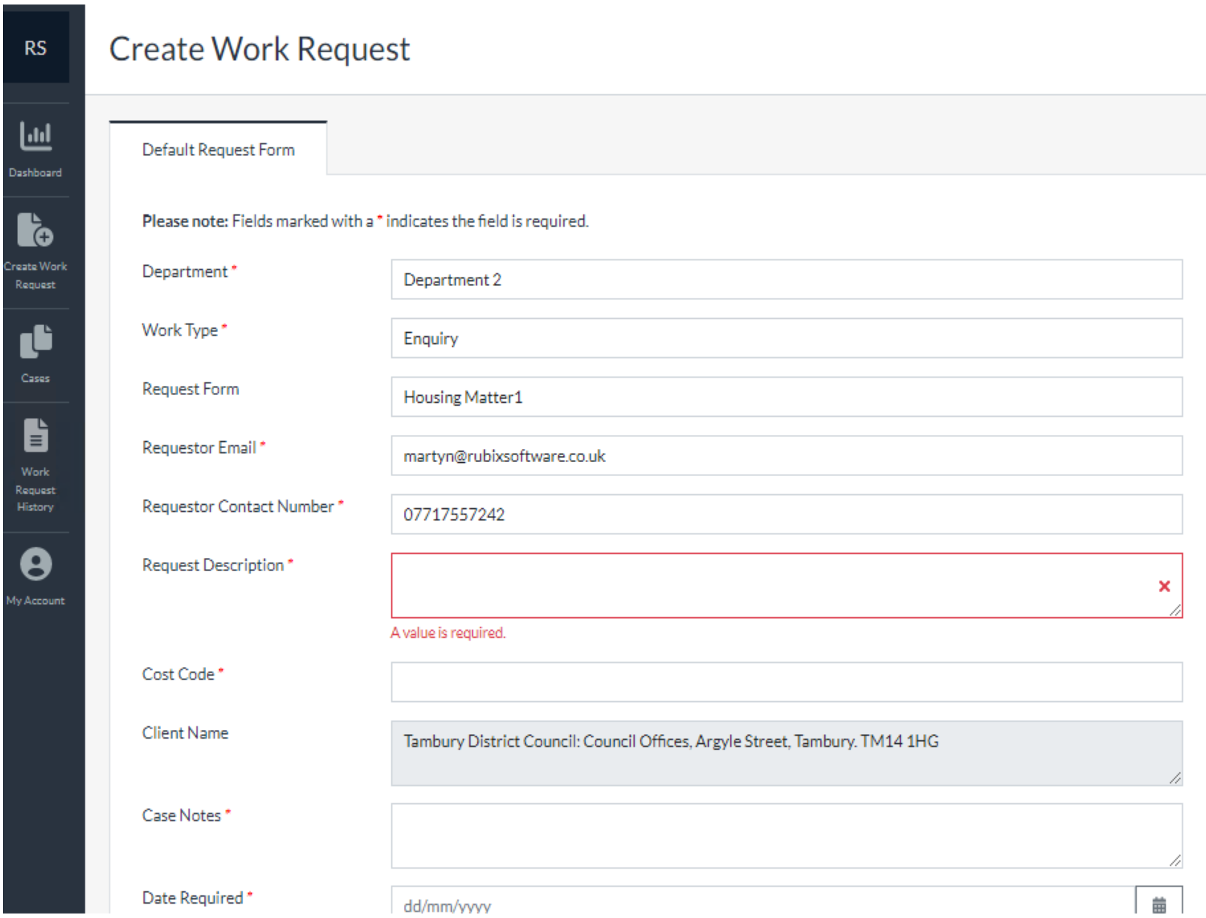


Work Requests

Creating a work request could not be easier. The user simply clicks on Create Work Request and the form to complete the piece of work is shown.

We know that dependent on the type of work you will need different information so this is controlled by you meaning that if needed, different forms can be shown to the user to deal with your specific work request.

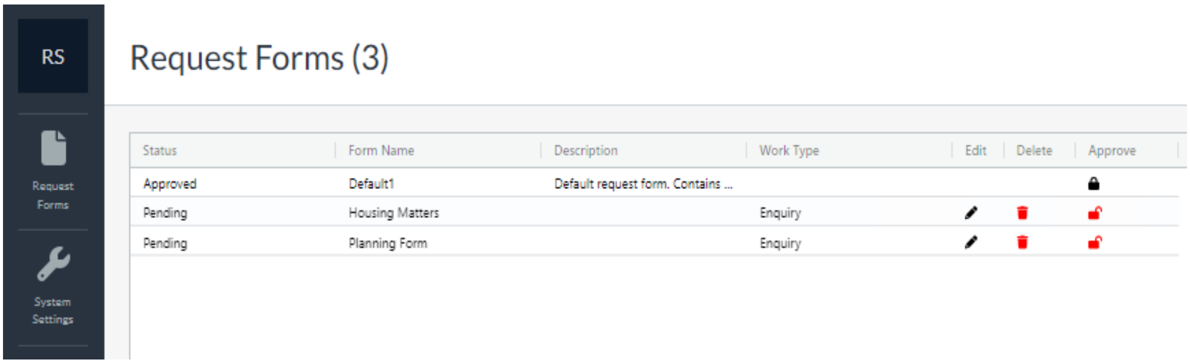
Once the request is submitted this creates the case automatically in Visualfiles. It is that easy.



Request Forms

Let us to look at how easy it is to create and edit your own forms.

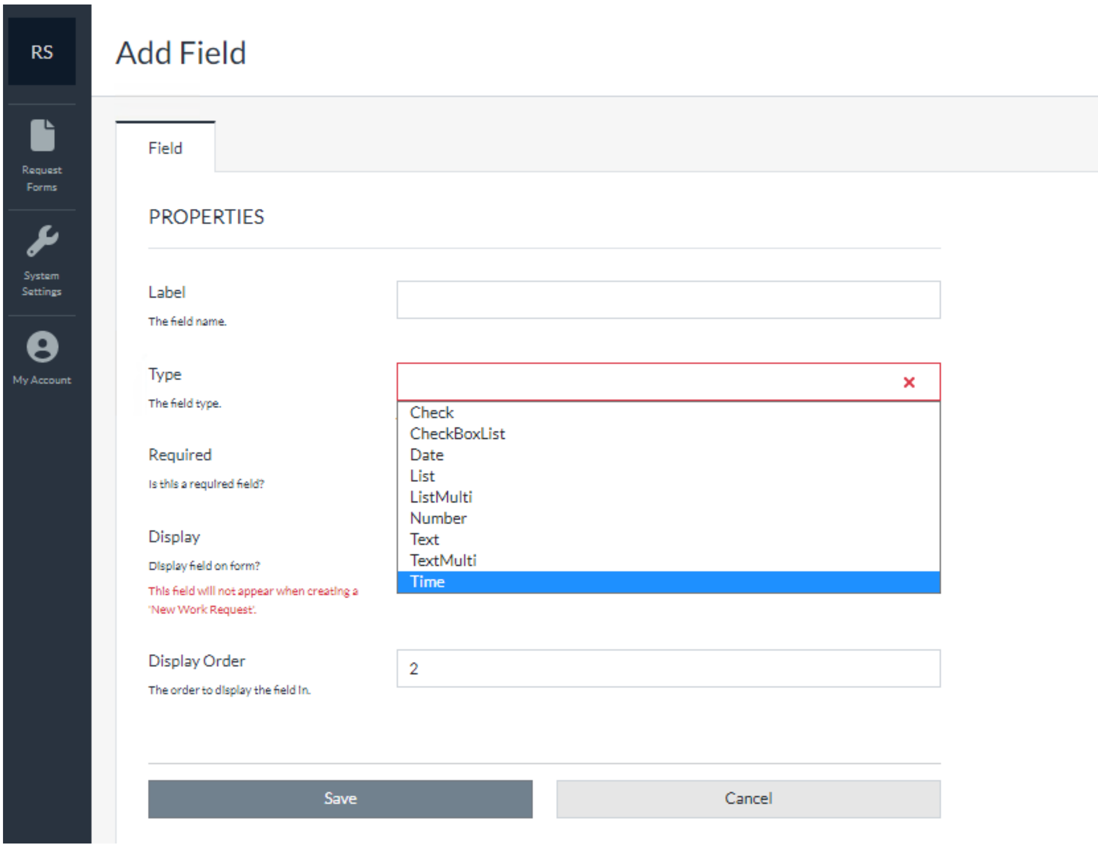
Here I can see all the Request Forms I have created. I can edit these forms and add fields as needed. When I am ready, I simply click the Padlock to make the form available within the system.



Request form fields

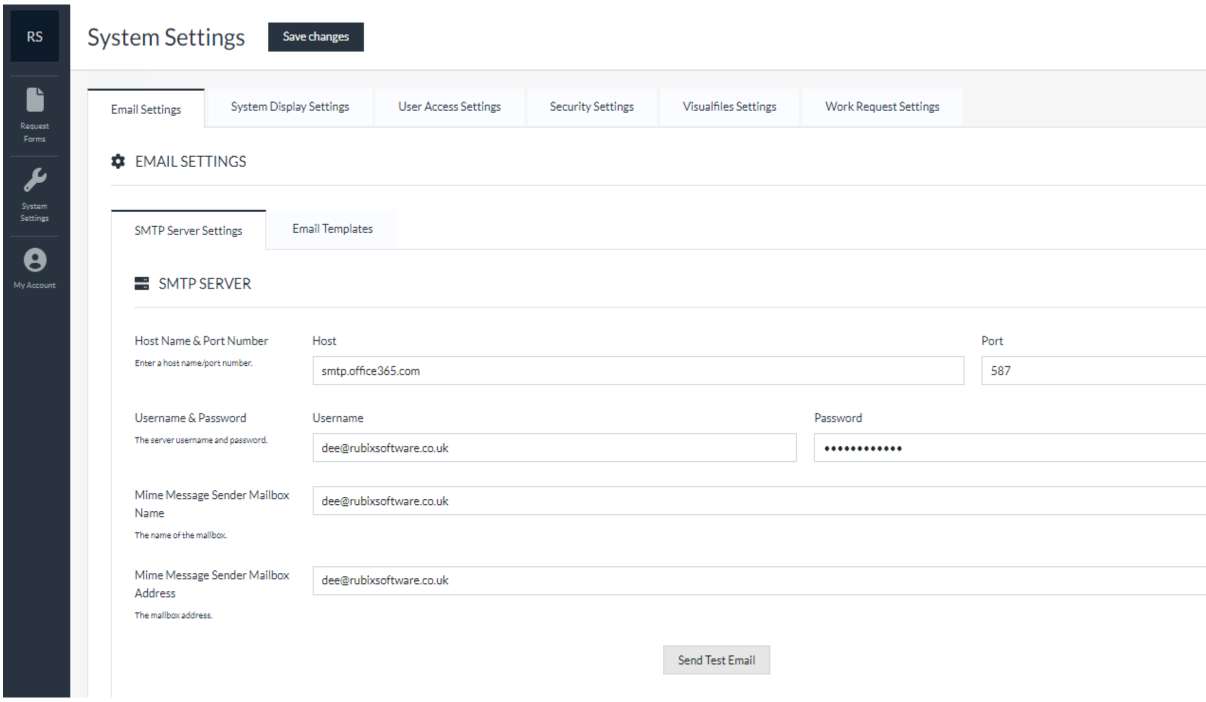
Connect allows you to add as many fields of several types to the form as needed.

Each field type has built in intelligence meaning you can set the field parameters to your exact requirements.



System Settings

Configurable settings include email, display, user access, security, Visualfiles and work requests.



Contact

To understand the power of Connect and for more information or to arrange a demonstration contact us at:-

Get in touch

Email: info@rubixsoftware.co.uk
Telephone: 0203 973 0975
Website: www.rubixsoftware.co.uk

Rubix Software,
The Warren,
Croydon Road,
Bromley,
BR2 7AL