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Connect



**Dynamic work request
system**



Contents

About	2
What is Connect?	2
Dynamic at the core	3
Designed with Visualfiles in mind	3
Different work types	4
Accessibility	4
Under the hood, where the magic happens.	5
Screenshots	6
Login	6
Viewing cases	6
Case details	7
Work Requests	7
Request Forms	8
Request form fields	9
System Settings	10
Contact	11

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.

Login

Email

 ✕
An email address is required.

Password

 ✕
A password is required.

[Forgotten password?](#)



Viewing cases

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

RS Cases (10) Filters Clear Filters Filter...

View	Case Owner	Description	Case Type	Current Status	Opened	Case Code	Case Holder	Priority
	Tambury District Council		Rubix Practice Management	Instructions	08/09/2022	TAM001/288	Rubix Connect Agent 1	Low
	Tambury District Council		Rubix Practice Management	Instructions	03/10/2022	TAM001/292	Rubix Connect Agent 1	Low
	Tambury District Council		Rubix Practice Management	Instructions	03/10/2022	TAM001/293	Rubix Connect Agent 1	Low
	Tambury District Council		Rubix Practice Management	Instructions	03/10/2022	TAM001/294	Rubix Connect Agent 1	Medium
	Tambury District Council		Rubix Practice Management	Instructions	03/10/2022	TAM001/295	Rubix Connect Agent 1	Low
	Tambury District Council		Rubix Practice Management	Instructions	03/10/2022	TAM001/296	Rubix Connect Agent 1	Low
	Tambury District Council		Rubix Practice Management	Instructions	03/10/2022	TAM001/297	Rubix Connect Agent 1	Low
	Tambury District Council		Rubix Practice Management	Instructions	07/10/2022	TAM001/308	Rubix Connect Agent 1	Low
	Tambury District Council	(TAM001/287) Tambury District...	Rubix Practice Management	Instructions	08/09/2022	TAM001/287	Martyn Paddon	Medium
	Tambury District Council	(TAM001/289) Tambury District...	Rubix Practice Management	Instructions	08/09/2022	TAM001/289	Rubix Connect Agent 1	Low

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.

Case Information Back To Cases Case Actions

Case Details Case Documents Case History Case Ledger Case Notes Case Messages Case Milestones Case Todo List

Case Client Survey Feedback

CASE DETAILS

Key Details

Case Owner	Tambury District Council
Description	
Case Type	Rubix Practice Management
Current Status	Instructions
Opened	08/09/2022
Case Code	TAM001/288

Key Personnel

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.

The screenshot shows the 'Create Work Request' form in the Rubix software interface. The form is titled 'Default Request Form' and includes a sidebar with navigation options: RS, Dashboard, Create Work Request, Cases, Work Request History, and My Account. The form fields are as follows:

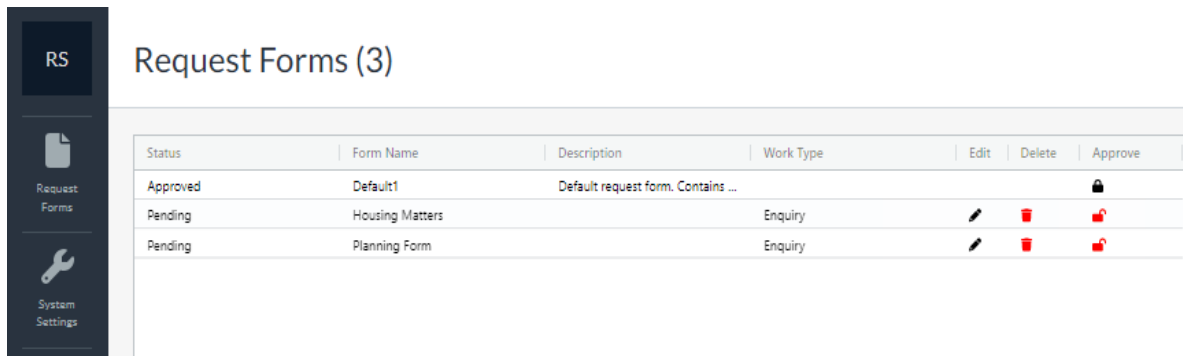
Field Name	Value
Department *	Department 2
Work Type *	Enquiry
Request Form	Housing Matter1
Requestor Email *	martyn@rubixsoftware.co.uk
Requestor Contact Number *	07717557242
Request Description *	[Empty field with error message: A value is required.]
Cost Code *	[Empty field]
Client Name	Tambury District Council: Council Offices, Argyle Street, Tambury. TM14 1HG
Case Notes *	[Empty field]
Date Required *	dd/mm/yyyy

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.

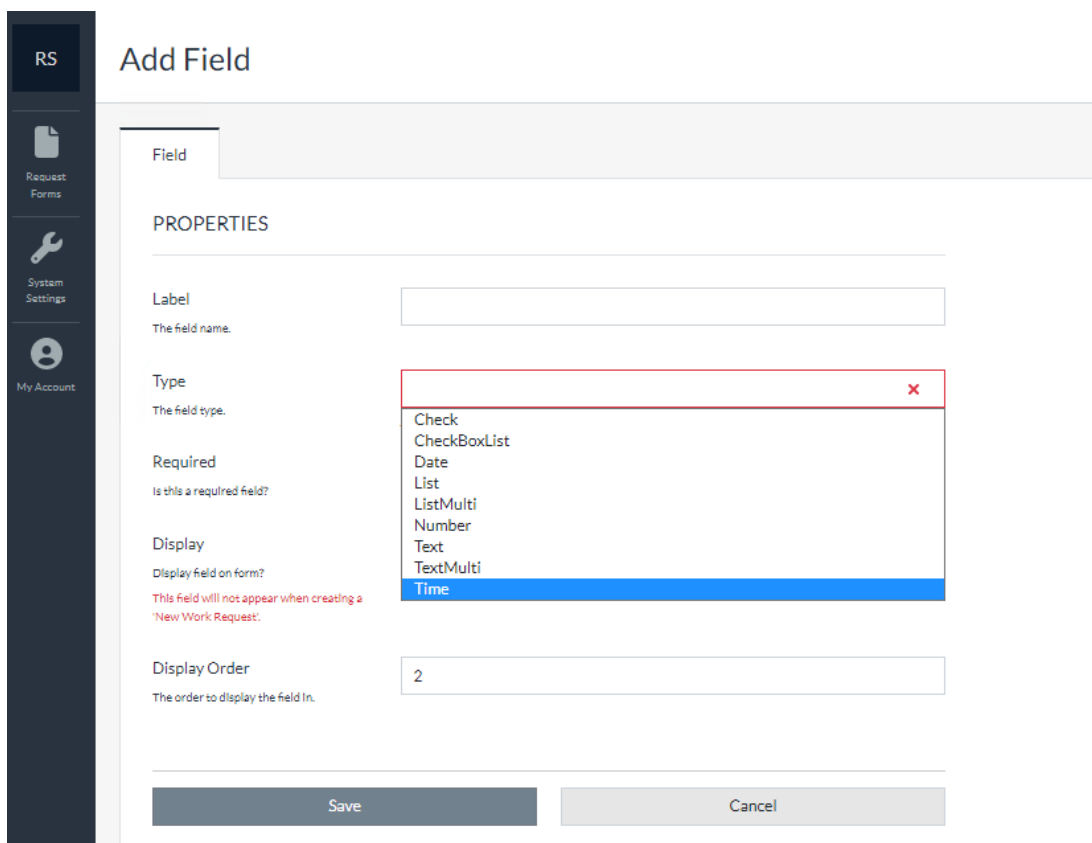


Status	Form Name	Description	Work Type	Edit	Delete	Approve
Approved	Default1	Default request form. Contains ...				🔒
Pending	Housing Matters		Enquiry	✎	🗑	👍
Pending	Planning Form		Enquiry	✎	🗑	👍

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.



Field

PROPERTIES

Label
The field name.

Type
The field type.

Required
Is this a required field?

Display
Display field on form?
This field will not appear when creating a New Work Request.

Display Order
The order to display the field in.

Save Cancel

System Settings

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

The screenshot shows the 'System Settings' interface. At the top, there is a 'Save changes' button. Below it, a navigation bar contains tabs for 'Email Settings', 'System Display Settings', 'User Access Settings', 'Security Settings', 'Visualfiles Settings', and 'Work Request Settings'. The 'Email Settings' tab is active, showing a gear icon and the text 'EMAIL SETTINGS'. Underneath, there are two sub-tabs: 'SMTP Server Settings' (selected) and 'Email Templates'. The 'SMTP SERVER' section contains the following fields:

- Host Name & Port Number:** A sub-section with a 'Host' field containing 'smtp.office365.com' and a 'Port' field containing '587'. A note below reads 'Enter a host name:port number.'
- Username & Password:** A 'Username' field containing 'dee@rubixsoftware.co.uk' and a 'Password' field with masked characters. A note below reads 'The server username and password.'
- Mime Message Sender Mailbox Name:** A field containing 'dee@rubixsoftware.co.uk'. A note below reads 'The name of the mailbox.'
- Mime Message Sender Mailbox Address:** A field containing 'dee@rubixsoftware.co.uk'. A note below reads 'The mailbox address.'

At the bottom right of the form area, there is a 'Send Test Email' button.

Contact

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

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