



RuleDesigner[®]

Project & Workflow



Define workflows and coordinate corporate resources

Generally, project-related processes develop themselves in an interconnected way both inside and outside the company, involving people, offices and companies. Thus, they should be assisted through the coordination of resources and the management of the state of progress, as their integration makes smooth and homogeneous the distribution of the information.

RuleDesigner Project already contains, in an integrated and structured approach, the document and relational process management systems. It activates proper managing rules and workflows to assist the activities' state of progress. Each user can finally carry out the activities for which he is responsible for delegating to the system the location of information in the right context, with permissions and rule-based notifications in real time.

The project and job order management module is already integrated with any solution of the suite. Indeed, it can be extended with a logic of interoperable modules to manage, integrate and optimize the processes that develop along the product lifecycle.

An integrated project management system integrated with the corporate processes through CRM, DMS, product structure management, machine card, PDM and post-sales with help desk, facilitate coordination, control and inter-functional collaboration.

Plan and organize your projects

Informative card

Each project and job order has one single integrated informative panel where to consult the progress status of each project-phase, attached documents (project files), activities and resources involved, deadlines, warnings, check-lists, events, risks, PDM part-numbers, products, tickets, offers and orders.

Classification according to project-type

It is possible to classify projects according to typology, thus defining for each project different workflows, managers, resources and informative repositories with specific sets of rules. All of that is available in one single, simple and comprehensive interface. Moreover, any information related to projects such as custom information panels, dynamic searches and templates is fully integrated with the entire RuleDesigner® suite.

Multi-project management

It is possible to support a multi-project management, thus encouraging both the connection with following generations of the same product and interactions between projects with common resources.

Planning project phases and activities (WBS)

Thanks to RuleDesigner® Project Management it is possible to plan project phases and activities supporting a stage-gate logic for planning, coordinating and checking every project phase. While leading a project, it is also possible to input notes, tasks and documents. Activities typologies are dynamic and configurable and meet the specific "modus operandi" of each company.

Workflow configuration using a Stage-Gate logic

RuleDesigner® platform is also provided with tools for a graphical representation of projects' progress status on the basis of a stage-gate logic. Each project is organized in phases associated to specific activities and persons even belonging to different company departments. These resources work in team and are guided by a project leader with cross-functional responsibilities. It is also possible to define check tasks along the project workflow.

Defining project teams and responsibilities

For each project it is possible to specify resources involved and their responsibilities. Even stakeholders external to the company can be involved in the project development (customers, suppliers and partners).

Creating projects on the basis of templates

Standard project templates can be created and used for new projects, inheriting workflow structures, persons responsible for different project phases and tasks.

GANTT chart

Activities schedule can be illustrated through a Gantt chart in order to plan and track specific project tasks, thus having a graphical and clear representation of projects' progress status.

Coordinate and collaborate with your working team

Re-planning work phases

There is the possibility to automatically re-schedule the work phases if revisions or changes are made along job orders execution workflows.

Milestones

The term milestones refer to the intermediate goals along the project workflow.

According to the typology (contract, invoicing, technical or checking milestones) they are associated to specific activities automatically generated from the system with a rule-based approach.

Checklists

Check-lists are areas where it is possible to create and add lists of tasks to be carried out and to be checked in order to be completed. Thanks to this function checking on the real progress status of specific activities becomes easier.

Project Assistance

By using RuleDesigner® it is possible to set rule-driven automatism for managing actions and warnings. As a matter of fact, project assistance tools can manage rules for automatic running of actions like skill-changes, distribution of activities and notifications. Moreover, they can even run RuleDesigner® configuration processes at the occurrence of specific events such as deadlines, opening or closing of a phase and percentage of completion.

Customer Relationship Management

It is an integrated environment for customer relationships management through information and data dashboards, classification and relational data, documents, contacts, tasks and related projects. Any customer-related information is available in a structured dashboard to be easily consulted and directly accessible from the project management environment.

Communication and collaboration in real time

It is possible to communicate with team members in real time thanks to tools thought for sending your conversations in a quick and safe way. Instant messaging tools make it possible to chat with other team members and talk about the current project.

Integrated management of documents

All documents, including technical sheets, are available and ready to be consulted in the project panel. In addition, permissions, approval workflows, versioning and filing automations can be set.

Track and share generated documentation

Automatic storage of emails

One of the main aspects and benefits of tracking information is linked to mail management. The most important communications and exchange of documents take place via mail. RuleDesigner® is able to track and intercept all sent/received emails, to check their content and to store them in the right company panel, connecting them to the right persons or projects and making sure that users don't need to do it manually. Furthermore, there is no need to change mail server (like Lotus, QMail, ..) nor client (like Outlook, Thunderbird). RuleDesigner® mail intercept tools allow to automatically store mails in the right project file.

Involving stakeholders

Stakeholders and the ones who are interested in the project can be involved in the project development workflow. Moreover, it is possible to share customized information on the basis of involvement level.

Projects and searches dashboard

RuleDesigner® platform is provided with advanced tools to search for projects, tasks, documents and products. By tracking and automatically storing information users can manage and search for data of interest, even from multiple devices or different places.

Reports and statistics

Tools for the generation of project-related reports in a few minutes and for any needs. Some examples of reports available are: activities carried out by a user for each project, list of complete projects or still in progress with evaluations and effective times. Reports can be also exported in different formats.

It is also possible to monitor the progress status of activities for each team member thanks to configurable and quickly to consult dashboards containing statistics and graphics updated in real time.

Informative dashboards

RuleDesigner® offers MyHome gadgets in order to have an overview of daily tasks by consulting Agenda and planners. Thanks to a configurable web dashboard each customer can see his activities and consult all information of interest according to the company position.

Engineer Change Management

With RuleDesigner® processes of Engineering Change Management can be standardized by mapping the workflow going from requests and tickets to changes.

RuleDesigner® is also able to track all requests, evaluations and changes already brought to the products. For each product or typology it is possible to define a specific change management workflow by assigning tasks and activities to users responsible for evaluating and making the changes.


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