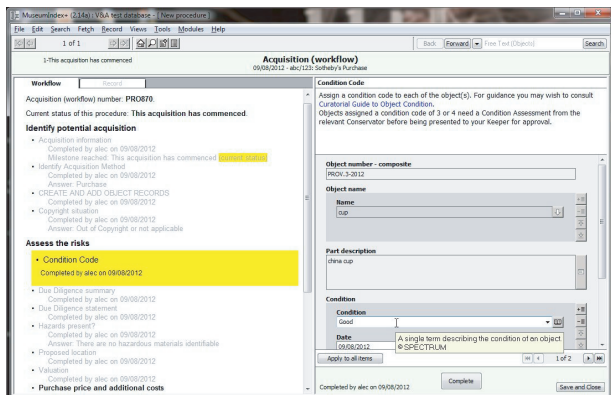


Workflow management

Supporting step-by-step procedures for collections management with CollectionsIndex+



A procedure workflow system for collections management

The workflow management system is a major feature of CollectionsIndex+. It allows configurable workflows to be defined that can lead the user step by step through procedures for carrying out the daily tasks of managing your collection such as Acquisition, Loans and Rights Management.

A procedure is defined as a series of steps, each of which can perform various types of task. Each step may be dependent on the completion of other steps and/or the answers given during the execution of those steps. Users are guided through the series of steps currently available to them. User roles can be configured to determine who is authorised to carry out certain steps. Steps requiring particular roles may be assigned to appropriate users. You may be notified of steps assigned to you by email and they are also clearly displayed on your CollectionsIndex+ home page. When a step is completed the system automatically records who completed that step and when.

Workflow task types

The CollectionsIndex+ workflow management system includes a comprehensive set of workflow task types, which can be combined to construct sophisticated collections management procedures.

Message

Present a simple message to the user (e.g. "I have received written confirmation of the loan agreement.")

Choose

Allow the user to choose an option that may then determine which further steps become available (e.g. Acquisition method: "Gift", "Purchase", "Other")

Create

Allow the user to create items such as object records associated with the procedure by filling in specified fields

System Simulation

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Edit

Allow the user to edit data from either the procedure record or its associated items (e.g. to fill in condition information about the objects during an acquisition)

View

Allow the user to view specified data from the procedure and/or its associated items (e.g. in order to review what's been recorded prior to approving a loan)

Report

Print out a report containing data from the procedure and/or its associated items

Assign

Allow the user to assign one or more other steps to a different user (e.g. one that has the required user roles or perhaps back to the originating user once such steps have been completed)

Powerful procedure management features

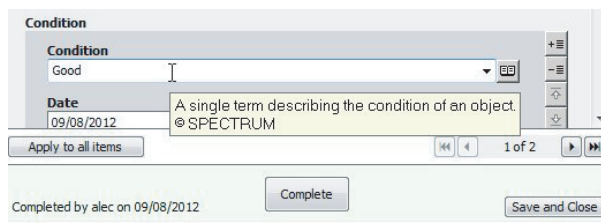
The CollectionsIndex+ workflow management system incorporates a range of features, designed to make operation of procedures as straightforward as possible.

Milestones

Milestones can be used to update the current status of the procedure record and its associated items. Once certain milestones are reached, steps can be frozen to prevent subsequent alteration of previously entered information.

Automatic field assignment

To streamline completion of procedure records, fields can be configured for automatic assignment of constant values, results of expressions based on previously entered data, specially generated values such as temporary object numbers, etc.



MuseumIndex+: Detail of an acquisition procedure with Spectrum help tooltip

Spectrum 4.0 Procedures

The CollectionsIndex+ workflow management system is supplied with a set of ready to use Spectrum 4.0 Primary Procedures. The eight Primary Procedures cover key collections management activities: object entry, acquisition, location and movement control, cataloguing object exit, loans in and out, and retrospective documentation.

The Spectrum procedures can be used as is, or customised to your own requirements.