



# **CRISP Technologies**

## **Interactive Workflow**

### **What is the Interactive Workflow?**

CRISP Technologies Interactive Workflow is an application that binds together business processes with the documentation and information people require to successfully complete the process. The Interactive Workflow is specifically designed to make linking documents and information about tasks easy and effective.

One of the strengths of the Interactive Workflow is that it can be adapted and molded to fit the current information or business process already in place. Alternately, the Interactive Workflow can be used when creating new business processes to capture and store the associated intellectual property.

There are also several project management tools included with the Interactive Workflow. Workflows can be viewed as a Flowchart or a Gantt chart for monitoring the timeline of a project, custom fields can be created to track information as the project progresses, and an audit trail can be produced at any time.

The Interactive Workflow is available as both an online internet based application for larger user groups, or a desktop model for single users or smaller user groups.

### **How can it help me?**

The Interactive Workflow can streamline any business process and provide the tools necessary to complete the process effectively and efficiently. Dynamically created workflows with visual cues help manage the process while the user-friendly layout and information contained within instruct and guide users towards the end goal.

#### ***Develop custom workflows***

The layout editing tools allow for the easy creation and customization of workflows. Drag and drop tasks, graphics and text onto the screen to illustrate the business process. Tasks can be connected with arrows to show the direction of flow.

#### ***Describe tasks and define important information***

Descriptions of the tasks can be added to define the actions and instructions needed to complete the task. Customs properties can be added to the tasks to track required data.

***Organize documents - create links between tasks and guidebooks, templates, samples, reference material, web sites, and other documentation.***

For specific tasks, add links to documents or web sites that provide more information. Any document type can be linked to the workflow including but not limited to Word documents, Excel, PowerPoint, PDF, html, etc.

***Link to other applications***

Supplemental applications, such as messaging systems and document management systems, can be launched from the Interactive Workflow. Data can also be sent to external applications<sup>1</sup>.

***View project overview or drill down to detailed information***

Tasks can link to child pages that contain more tasks and information. This allows users to drill down to more detailed information and see further workflows that describe how a task is completed.

***Filter project to concentrate on specific information***

Workflows can be filtered to only view the information that is important to you. Filter the workflow by team, user group, location, status, budget, etc. to focus in on a specific group of tasks.

***Manage the process using the built in project management tools***

Custom fields for tasks allow project managers to input dates, deadlines, resources and contacts to track project progress. Colour outlines for tasks allow for quick identification of task status and the timeline view provides a Gantt chart of the project to monitor if the project is on schedule.

***Email information to users***

The interactive workflow can package and send out information about tasks and procedures to the users. This provides an effective tool for delegating duties and responsibilities.

***Audit the business process***

The Interactive Workflow documents the business process so that it is easily laid out for auditing, review, and revisions. Changes are recorded and stored for analysis at any time.

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<sup>1</sup> External applications must be accessible via a url and accept data as part of the url or through command line arguments.

## What features are included?

- √ Visual cues on tasks to show status, child tasks, and document links
- √ Add document links to tasks under specific categories for increased document organization
- √ Track specific information by customizing task properties
- √ Email tasks, including the description and all the related documents, with the click of a button.
- √ Security features include the ability to lock the layout from further editing and to restrict user functionality for specific tasks
- √ Copy workflows to different files or location for back-up or test-run purposes
- √ Explore the tasks and documents in the workflow with the Project Tree
- √ Filter the pages to only show specific tasks (i.e. to only show one team at a time)
- √ Numerous printing options
- √ Export to Excel, MS Project, or as a web page
- √ Index of Documents with verification of document link validity.
- √ Search capabilities
- √ Several tutorials available
- √ **\*New - Gantt chart for monitoring the timeline of a project**
- √ **\*New - Access workflow information from a mobile device**

## What is the web based service?

The web based service is a hosted solution for workflows to be stored off-site and accessed through the web. All of the functions and features of the desktop version are included. Workflows can be viewed and edited from remote locations through a standard web browser. This solution provides greater accessibility and handles a larger number of users.

### ***Access from anywhere, anytime***

Mobile support is now available for clients using the web based service! Users can now retrieve real-time information on tasks and the status of the project from a mobile device.

*Note: your privacy is important to us, workflows are stored on secure servers or within corporate intranets to ensure protection of your organization's information.*

## What is required?

### *CRISP Technologies Interactive Workflow Engine*

- 300 MHz Pentium class processor or better.
- 64MB RAM, 128MB preferred.
- 10MB free space on hard disk.
- Minimum of 1024x768 video resolution is recommended.
- One of the following operating systems:
  - Windows ME
  - Windows NT 4.0 with at least Service pack 4
  - Windows 2000 with at least service pack 2
  - Windows XP
- A CDrom drive is required on one PC to perform the initial installation.
- An internet connection is required for product registration.
- Internet Explorer V5.5 or later must be installed.

Flash Player 8 ( available free at <http://www.macromedia.com> )

### *CRISP Technologies BCRP Workflow*

- 10MB free space on hard disk.
- Adobe Reader
  - available free at <http://www.adobe.com/products/acrobat/readstep2.html>
- Microsoft Office 2002:
  - Microsoft Word
  - Microsoft PowerPoint
  - Microsoft Excel
  - Microsoft Visio

### *ASP Hosting Environment*

All of the above plus a Microsoft based web server running IIS (version 5 or higher recommended).

*Users connecting to the ASP environment require:*

- Minimum of 1024x768 video resolution is recommended.
- A high speed internet connection (i.e. DSL/Cable).
- Internet Explorer V5.5 or later must be installed.

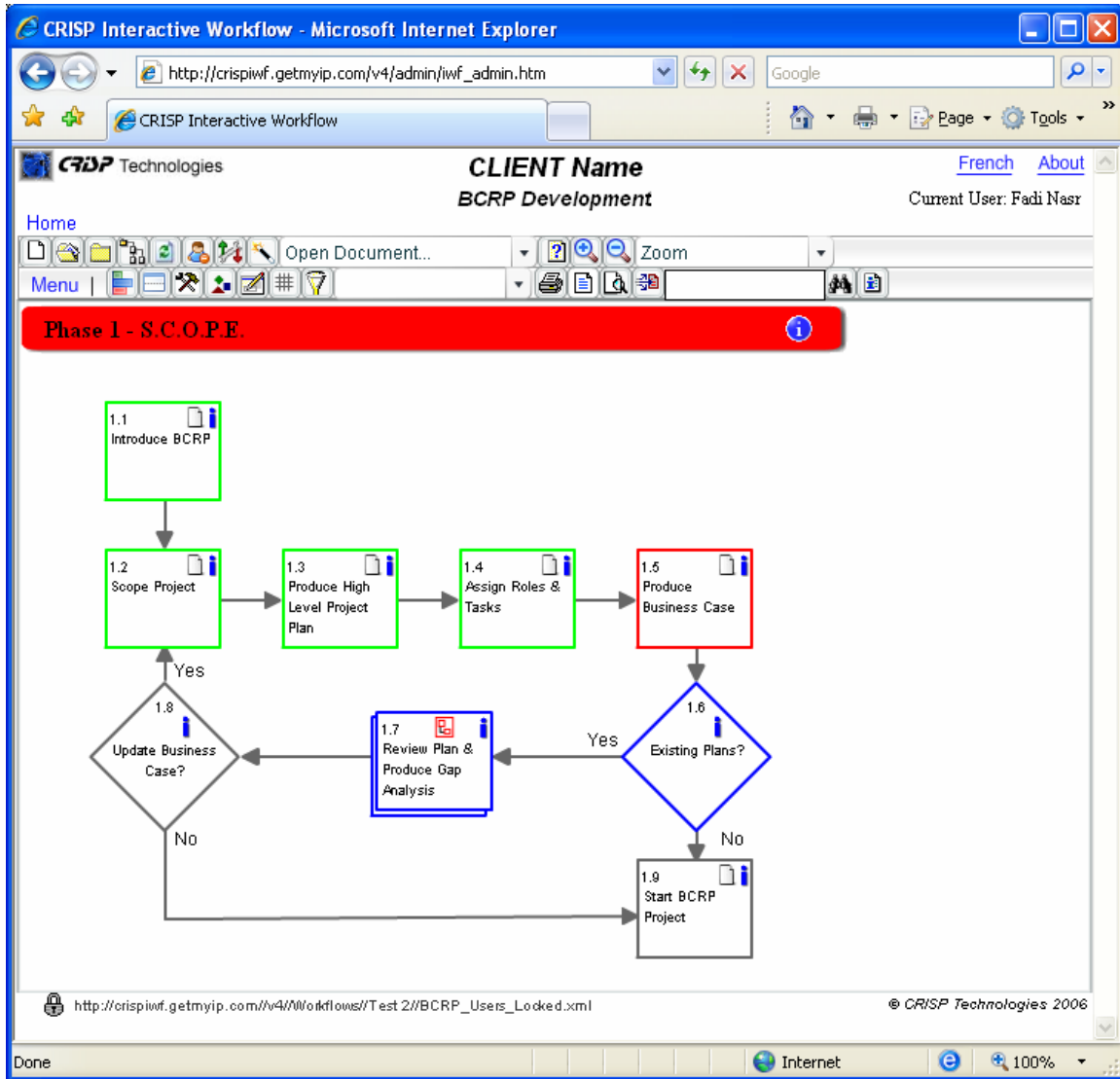
## Technical Foundation

The Interactive Workflow Engine is built using a combination of Flash, Javascript, XML, and a VB activeX control. The web service model also uses Active Server Pages.

## Example Application - Business Continuity and Resumption Planning

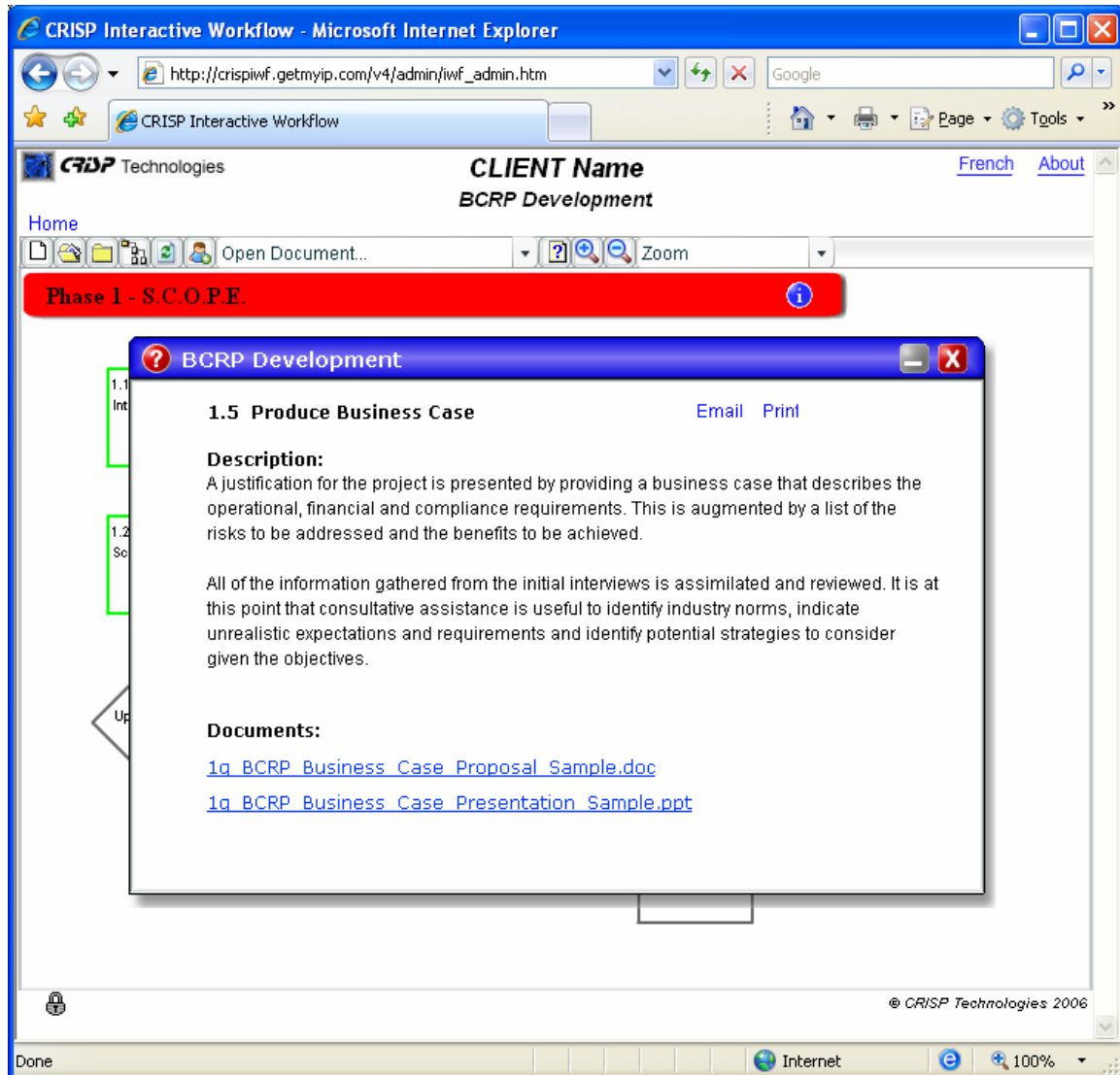
CRISP Technologies have utilized the Interactive workflow to present their proven methodology which covers Business Continuity and Resumption Planning process as well as the Disaster Recovery Process (see below for screenshots).

The first screenshot shows phase 1, Scope. Here, there are 9 tasks, 4 of which have been completed, one not complete, two in progress and two tasks not started yet.



*(Phase 1 of BCRP - Tasks involved in determining the scope of the project)*

This second screenshot shows the description and the documents linked to task 1.5, Produce Business Case. This information can be printed or emailed to other users. The description and links can be changed by users that are granted access to edit the workflow.



*(Task Information Window - displays the description, properties & document links for a task)*

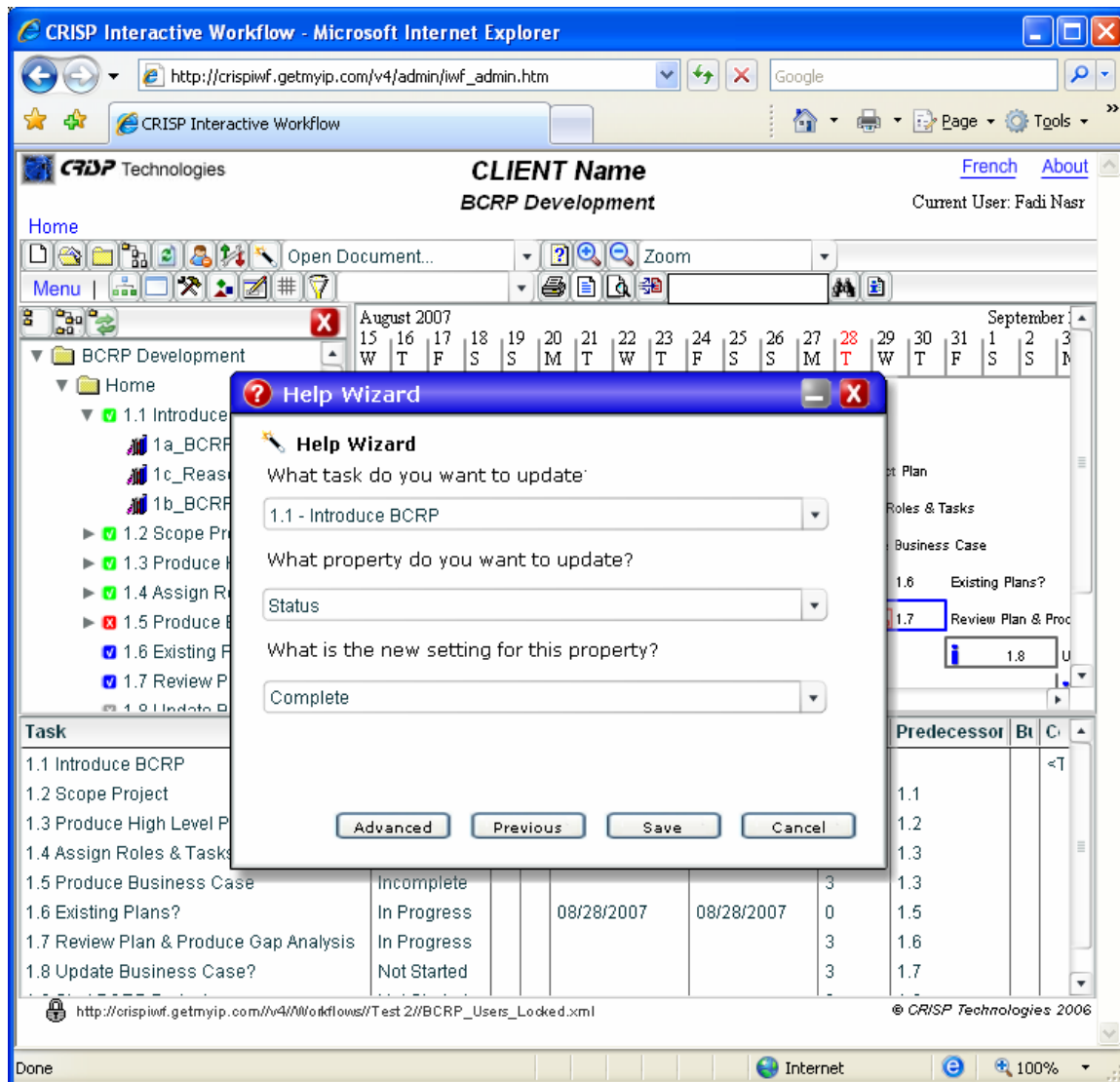
The following screenshot shows the timeline view with the project tree on the right and the properties displayed on the bottom. The project tree is used to navigate through the workflow and can be opened and closed whenever needed. The properties provide custom fields for project managers to enter data about the task, such as start date and end date. The properties are fully customizable, there is no limit to the properties that can be added and properties can be removed if they are not needed.

The screenshot displays the CRISP Interactive Workflow application in a Microsoft Internet Explorer browser window. The main interface shows a Gantt chart for a project named "BCRP Development". The timeline spans from August 15, 2007, to September 3, 2007. Tasks are represented by colored bars on the timeline, with their start and end dates and durations indicated. A project tree on the left side of the interface lists the tasks, and a table at the bottom provides a detailed view of the task properties.

Task	Status	Cc	Cc	Start Date	End Date	Duratio	Predecessor	Bt	C
1.1 Introduce BCRP	Complete			08/16/2007		1			<T
1.2 Scope Project	Complete					3	1.1		
1.3 Produce High Level Project Plan	Complete			08/22/2007	08/25/2007	3	1.2		
1.4 Assign Roles & Tasks	Complete					1	1.3		
1.5 Produce Business Case	Incomplete					3	1.3		
1.6 Existing Plans?	In Progress			08/28/2007	08/28/2007	0	1.5		
1.7 Review Plan & Produce Gap Analysis	In Progress					3	1.6		
1.8 Update Business Case?	Not Started					3	1.7		

(Managing a project using the timeline, project tree and property display)

The Help Wizard provides a friendly, easy way to update and insert information with minimal experience and training. Numerous advanced windows allow trained users more power to manipulate the workflow and the contained information.

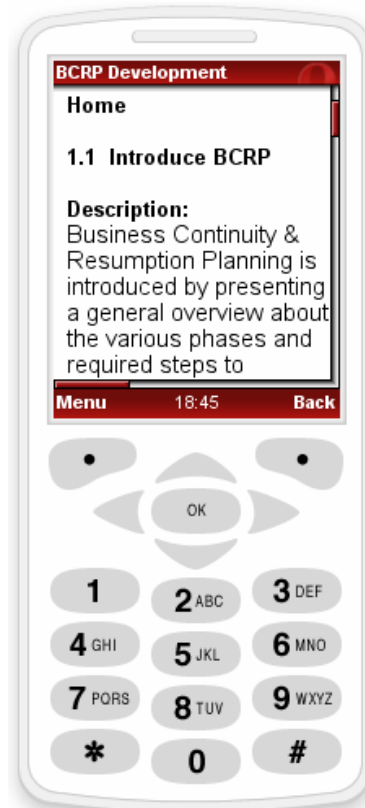


(Updating a property using the Help Wizard)

A brand new feature of the Interactive Workflow is the ability to view the tasks, descriptions, and workflow data directly from a mobile device such as a phone or blackberry. Data is delivered live, allowing for real-time tracking of the progress of the project.



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*(Task Description)*