HighGear®

Work Management At Scale

24 Critical Platform Requirements to Consider

When Evaluating a Workflow Automation, Case

Management, or Process Management Platform

Content

About HighGear

HighGear's **end-to-end no-code platform** for managing work at scale has continuously evolved to meet the needs of customers around the globe **for over 15 years**. During that time, the software solution has demonstrated an ability to flex and adapt to even the most rigorous environments and to perform exceptionally well in highly regulated industries.

A key to deploying workflow automation and achieving successful outcomes for many of those organizations began with their depth of scrutiny and rigor applied during the software evaluation phase. However, finding and implementing the right software can be expensive, time-consuming, and overwhelming. It takes engaging the right team members and stakeholders at the right time, understanding their constraints, and foreseeing future bottlenecks that can render a new software unusable. Not everyone has access to well-developed roadmaps or detailed specification lists to follow during that process. That's where **HighGear's "buyer's guide" with nearly 200 critical specifications** can make this process more time and cost-effective.

6 Critical Requirement Categories

This critical requirements document, available to those who schedule a free demo with us **here**, provides an in-depth review of **6 important categories** to consider in the decision-making process. These include:

- Task Management and Workflow Coordination

- Work Prioritization and Escalation

- Project Management

- Information Tracking

- Communication and Accessibility

- Technical Specifications

Within each of these areas, the full "buyer's guide'' provides an exhaustive list of functionality that should be present in any robust, **enterprise-grade** solution. It also includes mandatory requirements that we've found to be essential for any company to widely benefit from **workflow management software at scale**. 24 of the most critical/mandatory specification components are listed below.

24 Critical Platform
Requirements

Task Management and Workflow Coordination

Task Management and Workflow Coordination

01 Work, Request, and Issue Management System

System shall be capable of maintaining a permissions-enabled list of current work items (open tasks, requests, actions, projects, process instances, open issues, recorded suggestions, etc.), easily grouped by status or any other meaningful attribute.

02 Workflow

System shall be capable of maintaining a permissions-enabled list of current work items (open tasks, requests, actions, projects, process instances, open issues, recorded suggestions, etc.), easily grouped by status or any other meaningful attribute.

03 Field Permissions

System shall support the setting of permissions on built-in and custom fields. Permissions shall at least include read/write, read-only, and no access. These permissions shall be enforced throughout the system, including but not limited to tasks lists, forms, and reports. Permissions may be able to be applied to users or permissions groups (such as Clients, Employees, Engineering Team, HR Staff, HR Managers, etc.)

04 Automate Workflow

System shall be capable of processing a constant workflow plan, so that after each individual is finished performing their given task, the system will assign the issue to the next team, queue, or individual concurrently and automatically, so that the next task can be quickly seen and undertaken.

05 Constant Chain of Custody

System shall be capable of assigning an issue to a designated individual, Organizational Unit, or Queue, or group of same, for each step in the process. System shall be capable of transferring custody of a work item, project, or issue from one worker to another smoothly – and proper access to the task, related data and attachments shall automatically transfer as well, without violating field level permissions.

06 Activity Log/Audit Trail

System may be capable of maintaining a log or audit trail of all activity performed to the work item (issue). The log may record both the time/date of the activity, the actor, and a description of the activity performed.

Task Management and Workflow Coordination

07

Value Recording/Historical Integrity
System may be capable of processing a constant workflow plan, so that after each individual is finished performing their given task, the system will assign the issue to the next team, queue, or individual concurrently and automatically, so that the next task can be quickly seen and undertaken.

08

Due Date Display
Due dates for each task shall be prominently displayed. Due and overdue tasks shall be color coded for easy identification. Projects containing due or overdue tasks shall be color coded to reflect the highest needed attention level for problem tasks within the project and/or sub-projects' tasks.

Brief Description	Status	Due Date	Assignee	Owner
Report - SEC 13F	RPT20 - Report Generation	2/16/2022 9:00 AM		
Report - Bank Stress Test	RPT20 - Report Generation	1/28/2022 9:00 AM		

Work Prioritization and Escalation

Work Prioritization and Escalation

09

Input

When a work item (an issue) is initiated, the system shall be able to accept and record one or more metadata values to represent prioritization.

10

Priority Number Dashboard and Display

System shall be able to display project or task priority ranking in the homepage/dashboard screen.

11

Escalation

System may have capability to escalate an issue after a set period of time.
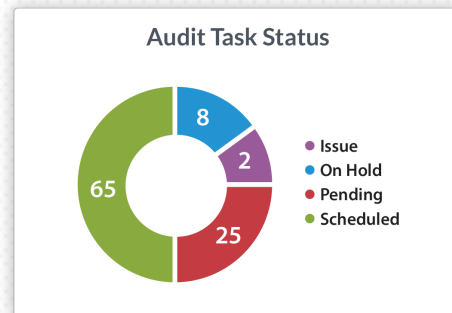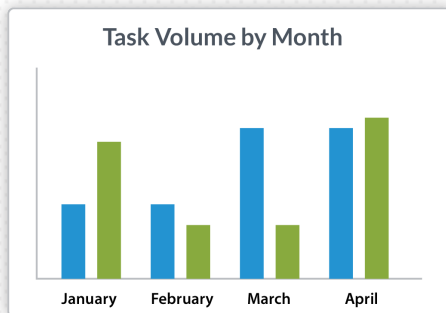
Project Management

Project Management

12

Periodic Work Reports

System shall be able to report total number of new issues and/ or number of tasks completed to managers and other users.

Task Volume by Month

January February March April

Audit Task Status

8
2
65
25

- Issue
- On Hold
- Pending
- Scheduled

13

Time Tracking

System shall be capable of recording a system generated timestamp that will record when a task (or a stage of a workflow) has been completed.

FORM

🕐 1/10/2022 3:00 PM

Status

APPROVED ✔

Information Tracking

Information Tracking

14

Upload Capability
System shall be capable of receiving uploaded documents.

PDF

15

Search Capability
Software shall have the ability to search through previously resolved issues/cases.

Search In	Search By	Search For	Status:	
Project Category	Contains	Item Name...	Open or In Progress ⌄	Search

Communication and Accessibility

Communication and Accessibility
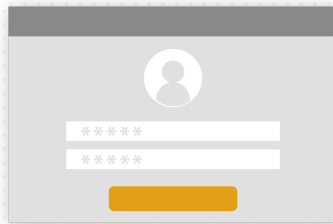
16

Contact Data Customization

System shall support the addition of custom fields for contacts, organizational units, and assets.

17

Local Login

The system shall have the capability to add users that are not LDAP/Active Directory enabled and grant them login rights based on a local or system specific account.

HighGear Users

Third-Party Authenticated Users

Anonymous Users

Technical Specifications

Technical Specifications

18   **Browser Compatibility**

System shall be accessible from any operating system capable of running a modern browser, including mobile devices.

19   **Installation**

System shall not require the installation of any client-side software (other than a supported browser).

20   **Agility**

System rules and workflow process shall be reconfigurable by an administrator without requiring downtime.

21   **Report Export**

System shall be able to export reports.

22   **Report Visualizations**

System shall enable data to be visualized using pie charts, bar charts, line charts, area charts, tables, crosstab tables, and various interactive and graphical outputs that facilitate intuitive decision support and trend analysis.

⚒ Technical Specifications

23 Report Datasets

System shall enable multiple datasets to be analyzed on one report, and shall provide access to Performance Data, Time Tracking Data, Productivity Data, Asset Data, Contact Data, and shall support customizable runtime parameters (such as user selectable date ranges, teams, task types, or other custom parameters) that can be selected by an end user when they desire to run a report.
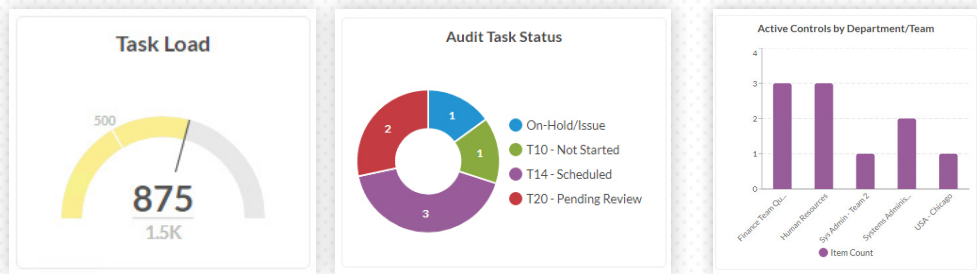
24 Training

Training shall be made available to client. Vendor shall include a description of training recommended or required with system purchase (include in pricing).

Deploying the Workflow

Beyond the nearly **200 point specifications** in the full buyer's guide, it's important to consider who will be responsible for successfully deploying workflow processes and the system at large and what resources are available for execution. It's no secret that developers are in short supply, especially for small businesses. So, many companies are turning to no-code platforms like **HighGear** to streamline business processes.

As part of the evaluation process, companies will want to consider whether their potential software partner will require any coding at all as well as in-depth technology support from in-house teams. With more teams working remotely, it's possible that a system can be deployed by everyday business users who are technically savvy and creative – especially if the prospective supplier can effectively help them with hands-on, human-to-human support when needed.

Software evaluation can be a complex and daunting task. But with the right partner, tools and information in hand, it doesn't have to be. Reach out to talk to us about how we can simplify your evaluation and for your copy of our complete specification tool. In the meantime, you can take advantage of our **downloadable version of the 24 mandatory requirements** that should be present in any useful workflow automation and process management solution.

HighGear®

The Only Way To Workflow

Automation | Workflow | Work Management at Scale | Process Excellence

HighGear is the leading, intuitive **no-code** platform for business analysts to rapidly build enterprise–grade workflow applications. It is the only enterprise–grade workflow application that allows teams of everyday business users to quickly assign tasks, manage work, track progress and report the status of activity that flows across dozens of departments in real–time.

HighGear provides business unit managers with **real-time visibility** into the status of operations to dramatically **improve efficiency, increase productivity and quickly respond** to changing market conditions to **accelerate digital transformation.** Whether HighGear is installed on-premise or hosted in the cloud, IT departments can easily control authentication and integrate with internal or external systems, while meeting enterprise-grade security requirements.

HighGear has been trusted by leading enterprises worldwide for **more than 15 years** to power **mission–critical processes** for companies in regulated industries while **meeting complex compliance requirements** for customers such as NASA, Baillie Gifford, TransCanada, Fifth Third Bank and more. To learn more about HighGear's no–code workflow platform, schedule a product demo or join HighGear's global customer community, please visit **https://www.highgear.com.**