


# AgilePort™: The cloud-based client reporting portal for AEC firms

- ▶ Win new business and build enduring customer relationships.
- ▶ Build your brand differentiation with flexible and customizable web-based client reporting options.
- ▶ Reduce document management costs.
- ▶ Deliver accurate reports and documentation to clients almost as soon as they're created.
- ▶ Get paid faster.





## Once your clients see your privately branded version of AgilePort, they're hooked.

Architectural engineering consulting (AEC) and testing firms generate a staggering amount of paper. Even small firms can produce tens of thousands to hundreds of thousands of documents a year—from one-page test reports to project reports that run hundreds of pages. And every single one needs to be produced, approved and distributed to customers over increasingly shorter time frames.

### **There are two problems with how documents are processed today:**

First, for most AEC firms, document management processes are still paper-based, highly labor intensive and surprisingly expensive. Studies show that managing a paper document from creation to final disposition can cost as much as \$75, which includes an average of \$20 just to file it. Multiply that by the number of documents you handle, and it's easy to see why all that paper is one of the biggest single drains on profitability.

Second, clients probably dislike processing paperwork as much as you do. After all, their world has changed—they're accustomed to doing business over online portals. They search and access content electronically. They want information delivered to them anytime, anywhere—personalized and available almost as soon as it's created.

Doing business the old-fashioned way costs too much and does too little to help set your firm apart in a competitive landscape. In fact, in many markets, innovative and responsive client service is the only real competitive differentiator today.

**AgilePort can give you that edge you're looking for.**

## AgilePort: Advanced, easy-to-use, surprisingly affordable

AgilePort enables you to provide secure websites that let clients and partners browse, search, sort, and retrieve documents related to their projects.

As part of Agile Framework's "straight-through" business processing, AgilePort manages client deliverables from various sources—including field reports, lab reports, invoices, etc.—as soon as they're created and ready for distribution. Information flows seamlessly from system to system and ultimately to clients in a straight-through fashion that:

- reduces paper and rework,
- improves accuracy,
- reduces document management costs, and
- can help to dramatically compress the time between service delivery and payment.

AgilePort can give you a significant competitive advantage in the markets you serve. Clients can have access to field test results and project documentation in hours instead of days or weeks—quickly and effectively delivered over custom-branded portals that enable them to access information in their preferred medium as soon as it's completed and approved. AgilePort includes document repositories with full-text capabilities and (optionally) map-based images of complex or geographically dispersed projects with drill-down views into field logs, soil boring/test pit logs, analytical results, reports, photographs, and other project-related documents.

Once your clients see their personalized website you have delivered through AgilePort, they're hooked on the technology—and hooked on your firm.



## AgilePort Overview

AgilePort enables you to provision client portals and publish client deliverables as soon as they've been created and approved. Optionally, it can then notify the client via email when new test reports and other project information is published to a custom-branded portal. Client report review and delivery processes are optimized, integrated, and streamlined.

With AgilePort, your clients get deliverables fast and you drive unnecessary costs and inefficiencies out of the deliverable reporting process.



### Provisioning your client portals

Provisioning client reporting portals is efficient and intuitive.



### Publishing your client deliverables

Publishing field data, laboratory results, project data, and accounting and invoicing data is seamless



### Delivery Notification

Providing customized email notification.



## AgilePort: Welcome to AEC 2.0

Technology is transforming the AEC industry. Agile Frameworks calls this new way of thinking AEC 2.0.

AEC 2.0 means paperless processes and integrated systems—from the field to the client. AEC 2.0 means working in the Cloud. AEC 2.0 means real-time information access and faster client deliverables. AEC 2.0 means using technology to drive out process inefficiencies, providing firms the opportunity to compete profitably in a highly competitive landscape.

Along with MetaField, Agile Framework's field information management system, AgilePort helps move your firm into the world of AEC 2.0. You'll reduce your dependency on time-consuming and expensive paper-based processes as well as help streamline and automate interactions among project management, field, testing, accounting, invoicing, and client reporting. AEC 2.0: delivering the kind of fast and responsive client service that helps win new business and cement long-term relationships.

## How AgilePort works

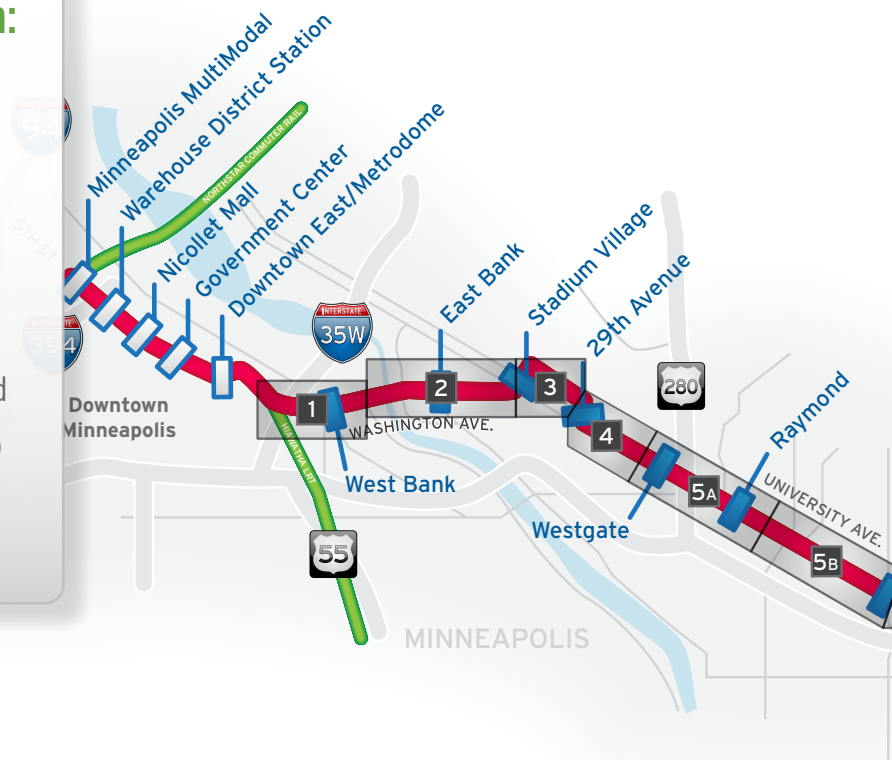
# Drill-Down Branded Client Portals

AgilePort enables branded client portals that deliver information in the medium your clients prefer. Your small clients may only need document folder structures with full text search capabilities—features provided by AgilePort’s default portal.

Your larger clients with complex or geographically dispersed projects may take advantage of AgilePort’s more sophisticated features like the ability to access custom portals using drill-down imagery, maps, project layouts and floor plans of specific locations.

### With AgilePort, your clients can:

- Instantly access test reports and project documents related to even the smallest components of a project while maintaining a “big picture” project overview;
- Turn data into decisions faster;
- Keep projects on track and on budget;
- Eliminate construction delays and rework; and
- Reduce document management costs and go paperless.



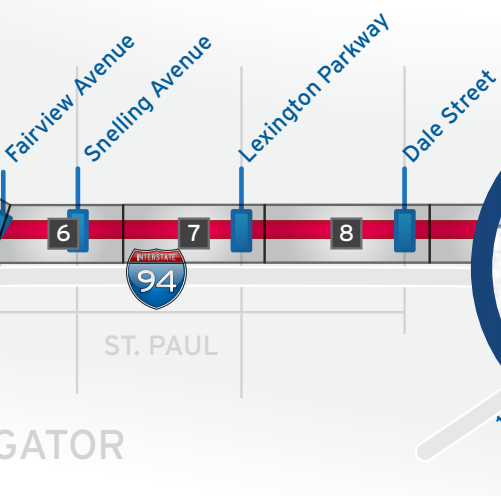
Map shows the \$1 billion Minneapolis/St. Paul Central Corridor Light Rail Transit project, which spans a length of 10 miles between downtown St. Paul and downtown Minneapolis.

CORRIDOR NAVIGATION



Drill down from project overview to detail in four mouse clicks

- 1 Sub-Sector Detail
- 2 Site-Level Detail
- 3 Project Asset List
- 4 Project Assets



A screenshot of a "DAILY LOG FORM" for the CCLRT Building. The form includes fields for Project Name, Date, Time, and Location. It also has a section for "Site Conditions" with checkboxes for "Dry", "Wet", "Flooded", "Asphalt", "Grass", and "Other (Specify)". A table at the bottom lists "Drill Log" data with columns for "Location ID", "Depth", "Time", and "Remarks". The form is signed by "Phillips, John" on "Oct 12 2009 3:24 PM".



A screenshot of a "CCLRT Documents" table. The table lists documents with columns for "Name", "Title", and "Sample ID".

Name	Title	Sample ID
CCLRTDailyLog_Team2_10-12-2009.pdf		10/12/2009
CCLRTDailyLog_Team2_10-12-2009.pdf		10/12/2009
BL-09-01815 090712 FINAL.pdf	Soil and Groundwater Analytical Results	10/12/2009
10-012.pdf	Log of Boring	
Section 10 - Soil Analytical Results Table - Page 2.pdf	Soil Analytical Results Table	
Section 10 - Water Analytical Results Table - Page 3.pdf	Water Analytical Results Table	

## How AgilePort Works

# Provision, Publish, Deliver

AgilePort has three components:

Provisioning, Publishing and Delivery.

Data from the field and from your project management, LIMS, and other systems flows seamlessly through AgilePort to client portals in an automated, straight-through fashion.

Whether you offer your clients a default AgilePort portal or customized portals with intuitive data visualization, it provides your firm with a competitive advantage for winning new business while retaining and improving your relationship with existing clients. With AgilePort, construction-related issues can be more transparent, potentially saving clients time and money, while instilling confidence in your accuracy and professionalism.

*The bottom line:*

**AgilePort is a great tool for building long-term client relationships.**

## Provisioning

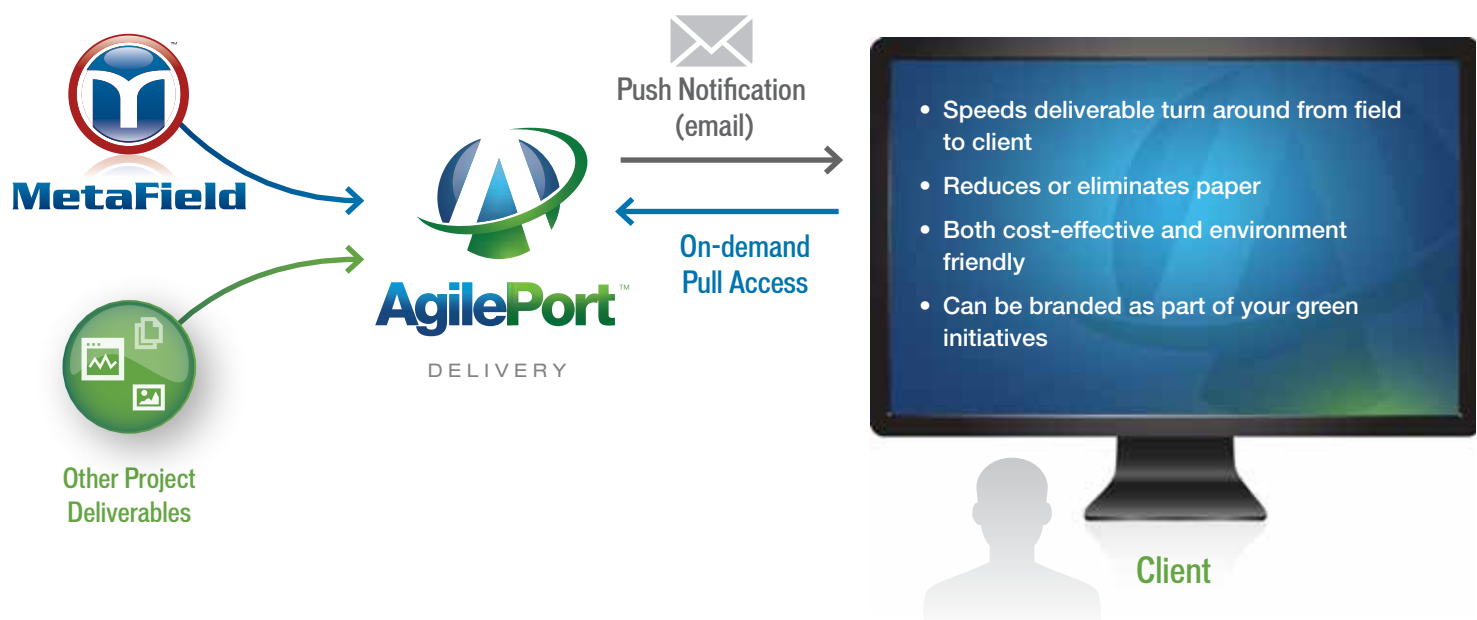
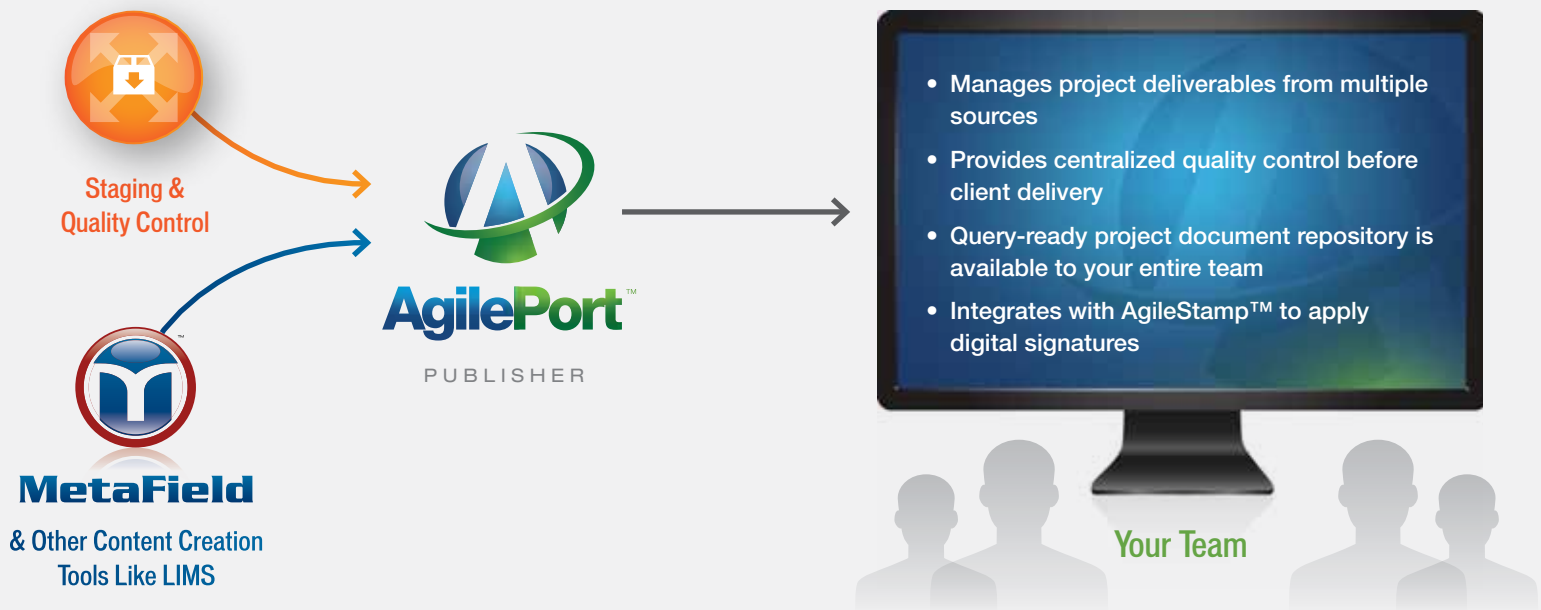
Provisioning client reporting portals is efficient and intuitive. When a project is authorized and a project number and client and contact data is entered into your project or CRM system, a client portal can be created. It is privately labeled with your brand. Optionally, Agile Frameworks can work with you to create a customized version for your strategic clients. And since your AgilePort client portals are hosted by Agile Frameworks and accessible to clients over the Cloud, there's little to no investment in hardware or software.

## Publishing

AgilePort seamlessly publishes field data collected by Agile Framework's MetaField software. It can also be configured to publish LIMS results, project data, and accounting and invoicing data, where it can be reviewed for quality and accuracy. The Publishing Manager includes a set of back-end components that "listens" for events, stages them for client delivery, and directs them to the proper client portal.

## Delivery

After moving through the quality control process, AgilePort enables you to publish documents to the appropriate client portal. If preferred, it can notify a client by email with a link that points to specific document(s) just published. Clients can browse their portal from anywhere, anytime. The publishing and notification functions are configurable upon your clients' preferences, so clients can specify if they want daily or weekly notifications, or notifications whenever an event occurs.



## Business features and functionality:

- Self-service access to project documents over default or customized portals;
- Secure access through individually assigned user accounts and secure sockets layer (SSL) encryption;
- Full-text document search capability—for example, search for all soil borings that encountered specific debris such as ash;
- Optional-Image-mapped document filtering so that documents related to a specific segment are viewed and filtered simply by clicking on an aerial view map;
- Variety of document sorting and filtering options, such as sorting by creation date, document type, boring location, etc.;
- Optional email alert when new documents are added to the client's document library;
- Long-term retention and archiving of project documents—even after projects are completed;
- Document version tracking; and
- Standard client user interface powered by Microsoft SharePoint 2010.

