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# Project Management, Document Management, and Collaboration

Sorting through the confusion of content storage and collaboration



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# Objective

Excited and clear about solving a significant problem in your organization



# Back in the old days...

- Time sheets
- Invoices
- Billing backup
- Owner draws
- Equipment location
- HR documents
- Drawings
- Checks
- Photographs
- Workflow



*Scary, right?*



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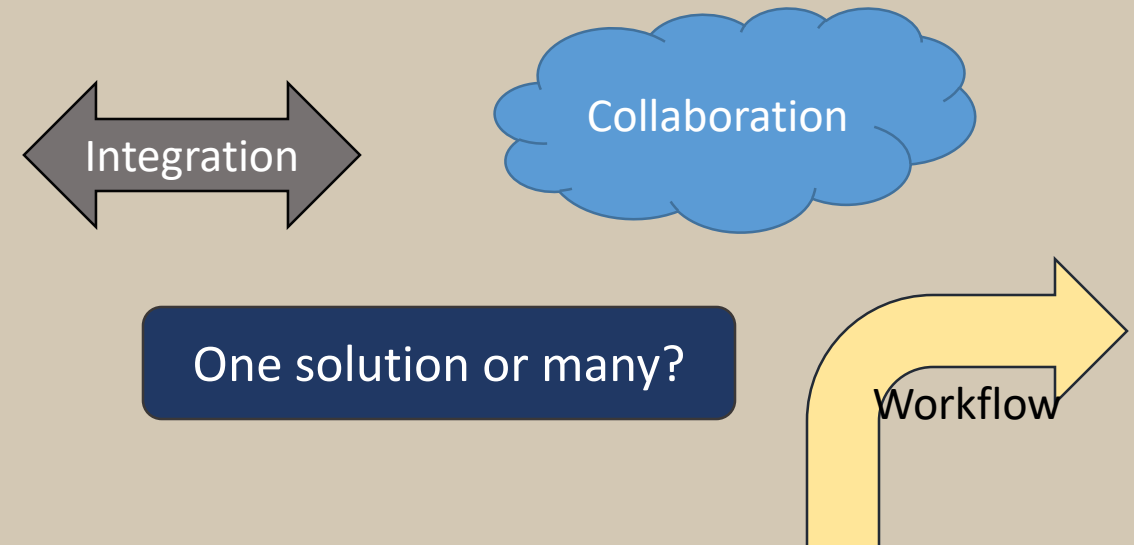
# Project Management

Definition evolving



# Project Management

- RFIs and Submittals
- Communication
- Meeting Minutes
- Daily logs
- Alerts/Notification
- Cost Management
  - Contracts
  - Forecasting
- Budgeting
  - Change Order Management
- Document sharing
- BIM integration

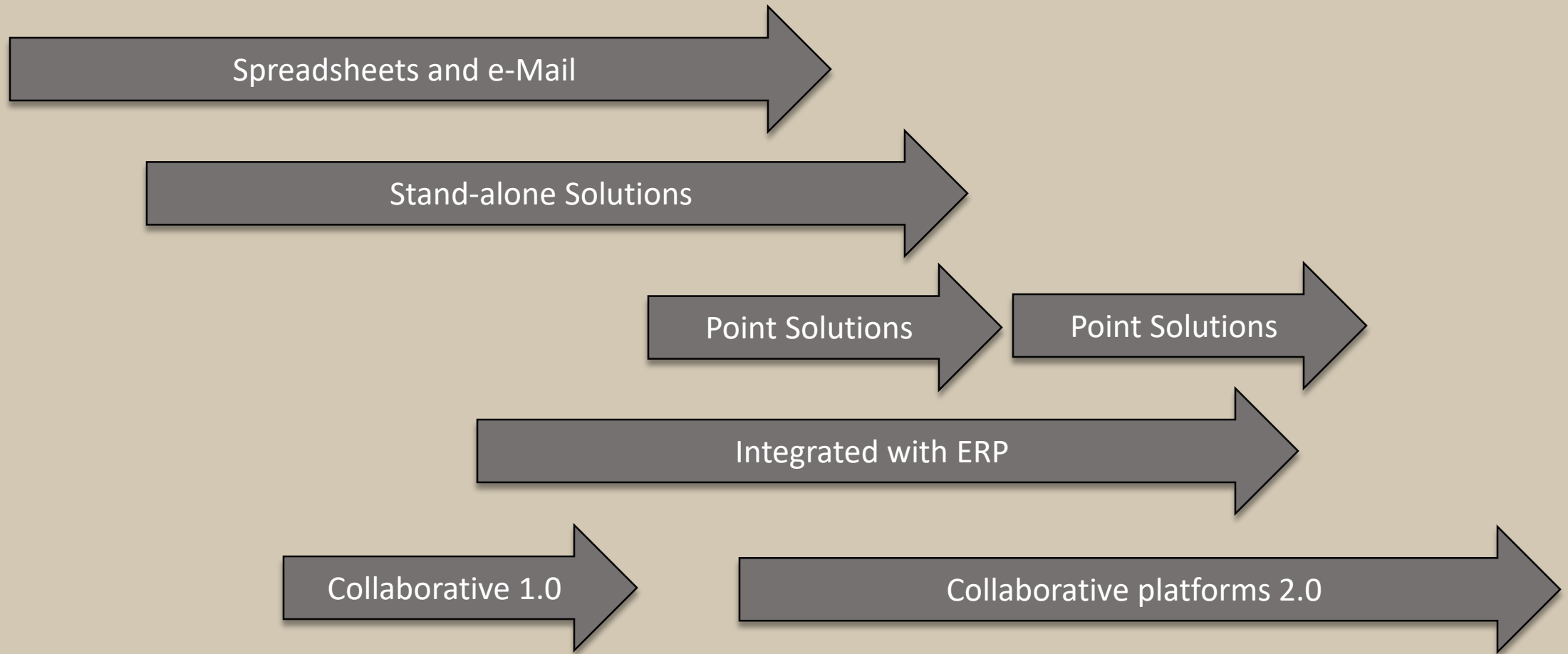


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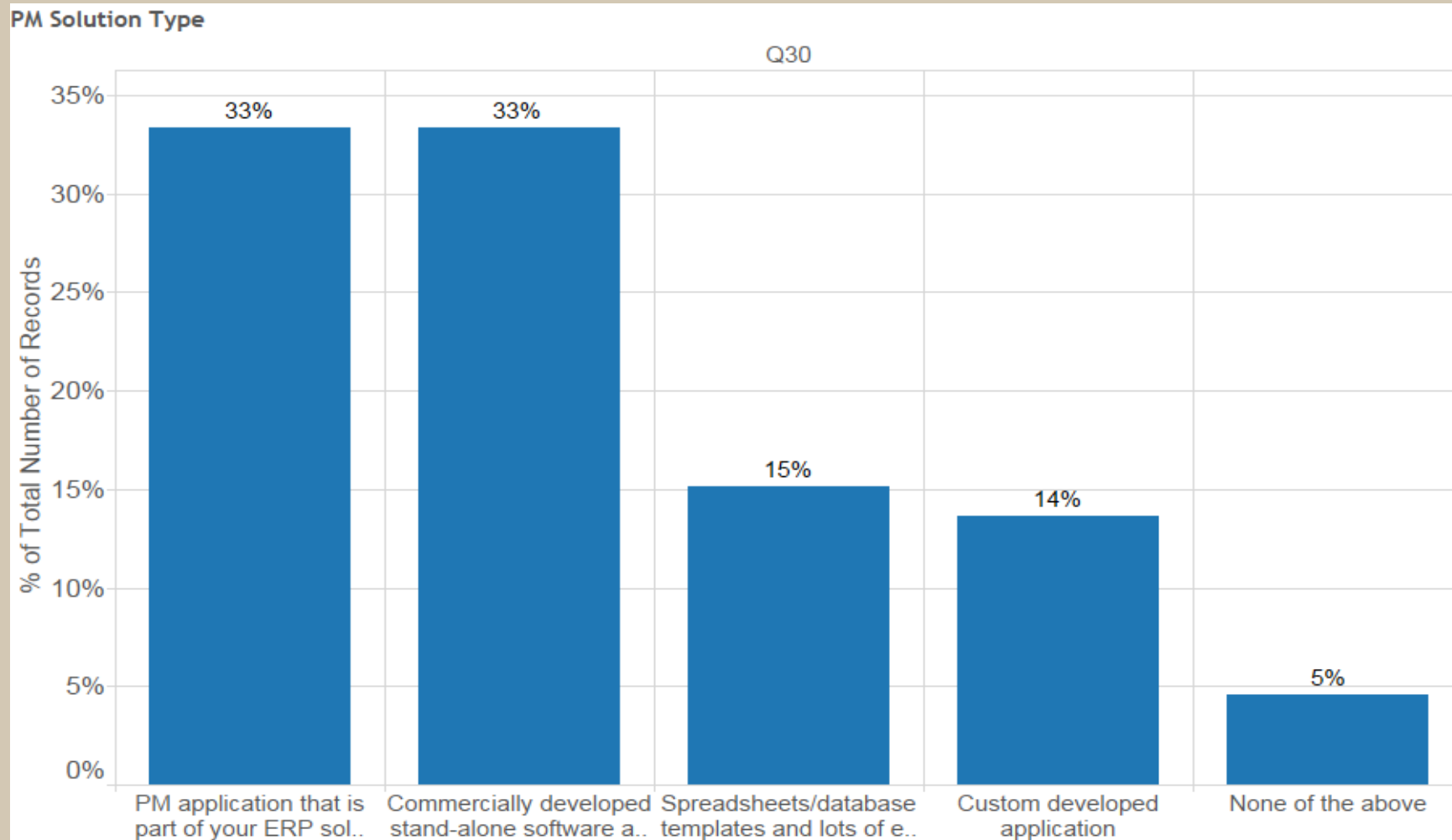
# Is it an Application or a Platform?



# Evolution and Transitions



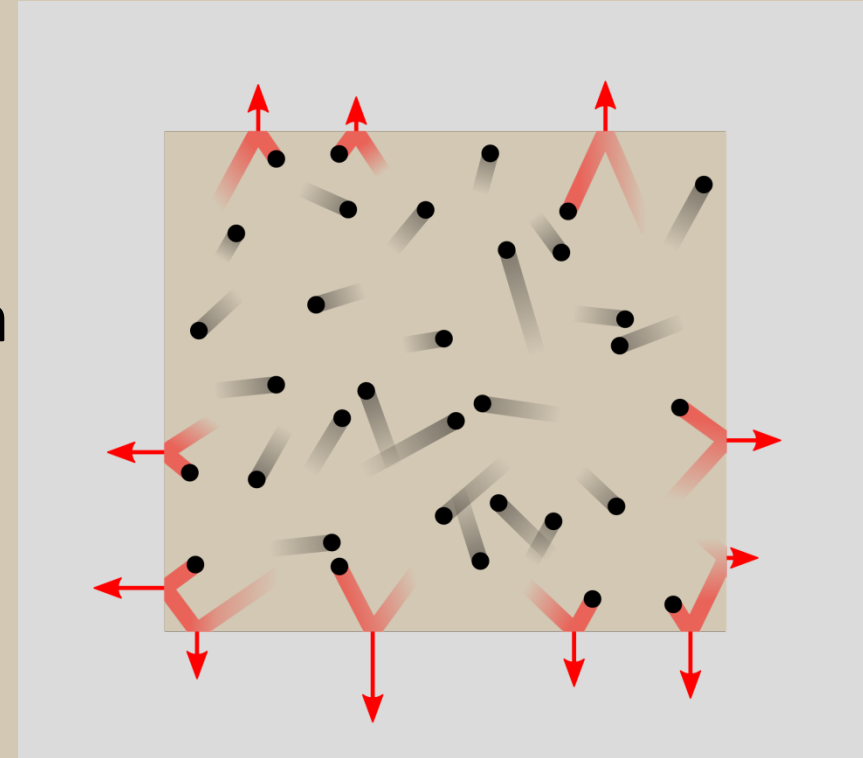
# Use of PM Solutions





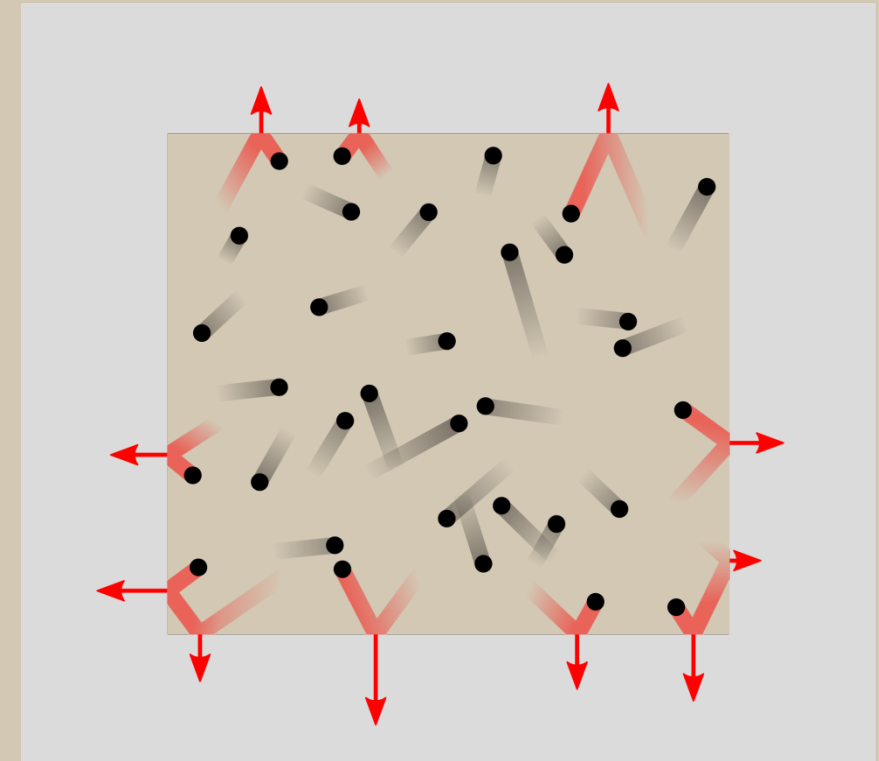
# Pressure and Forces

- Far more tech savvy workforce
- Better connectivity at job sites (some)
- More demanding owners with their own system expectations
- Proliferation of point solutions
- Lack of standards driving interoperability
- Mobile solutions and platforms have emerged
- Business development wants access to data



# Pressure and Forces

- BIM and related solutions encroaching
- ERP and expanding footprint
- Construction not less litigious
- Content storage options **made easy**
- Compliance more critical
- Business Intelligence needs access
  - Success/risk factors at the enterprise level



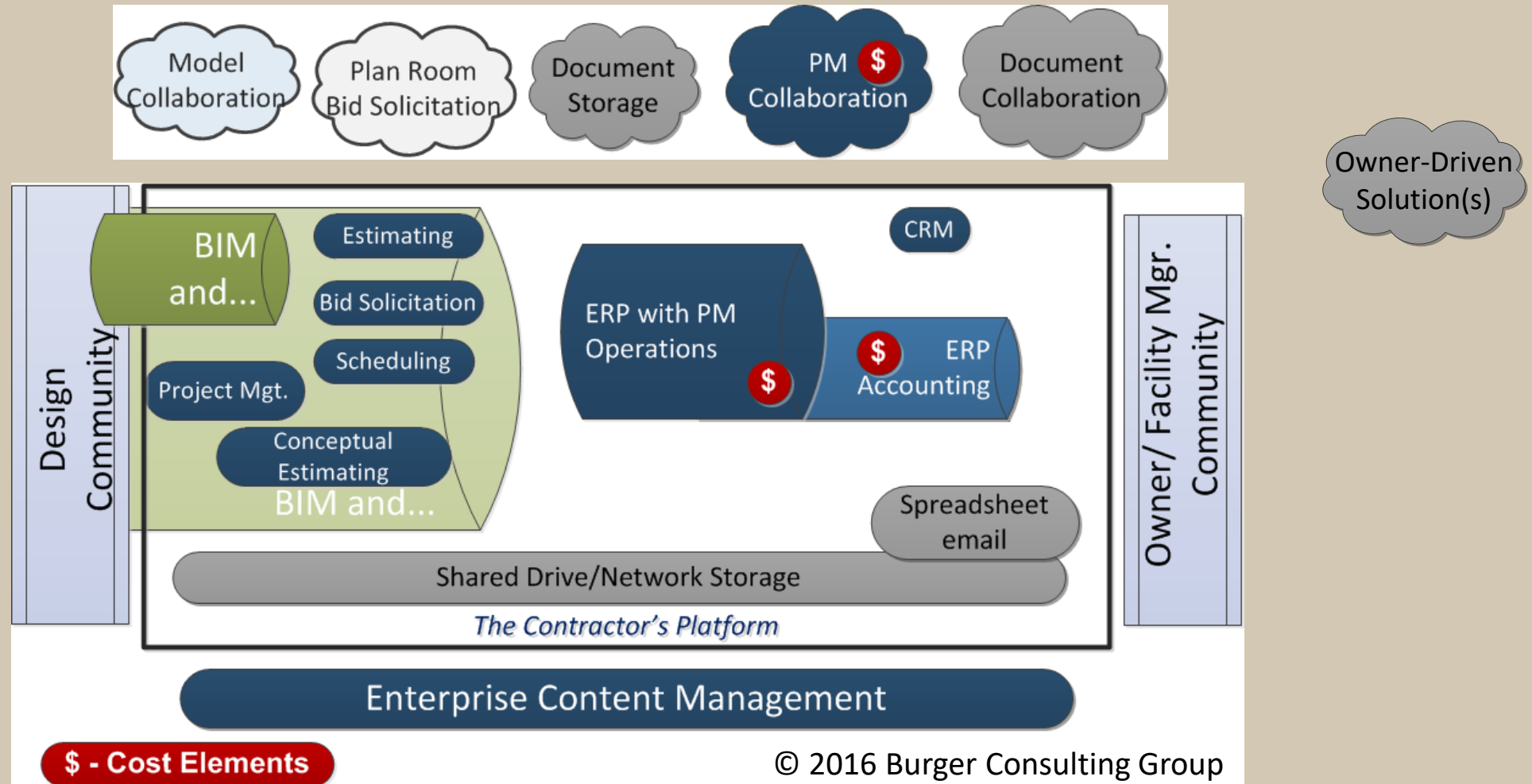
# Broader Definition

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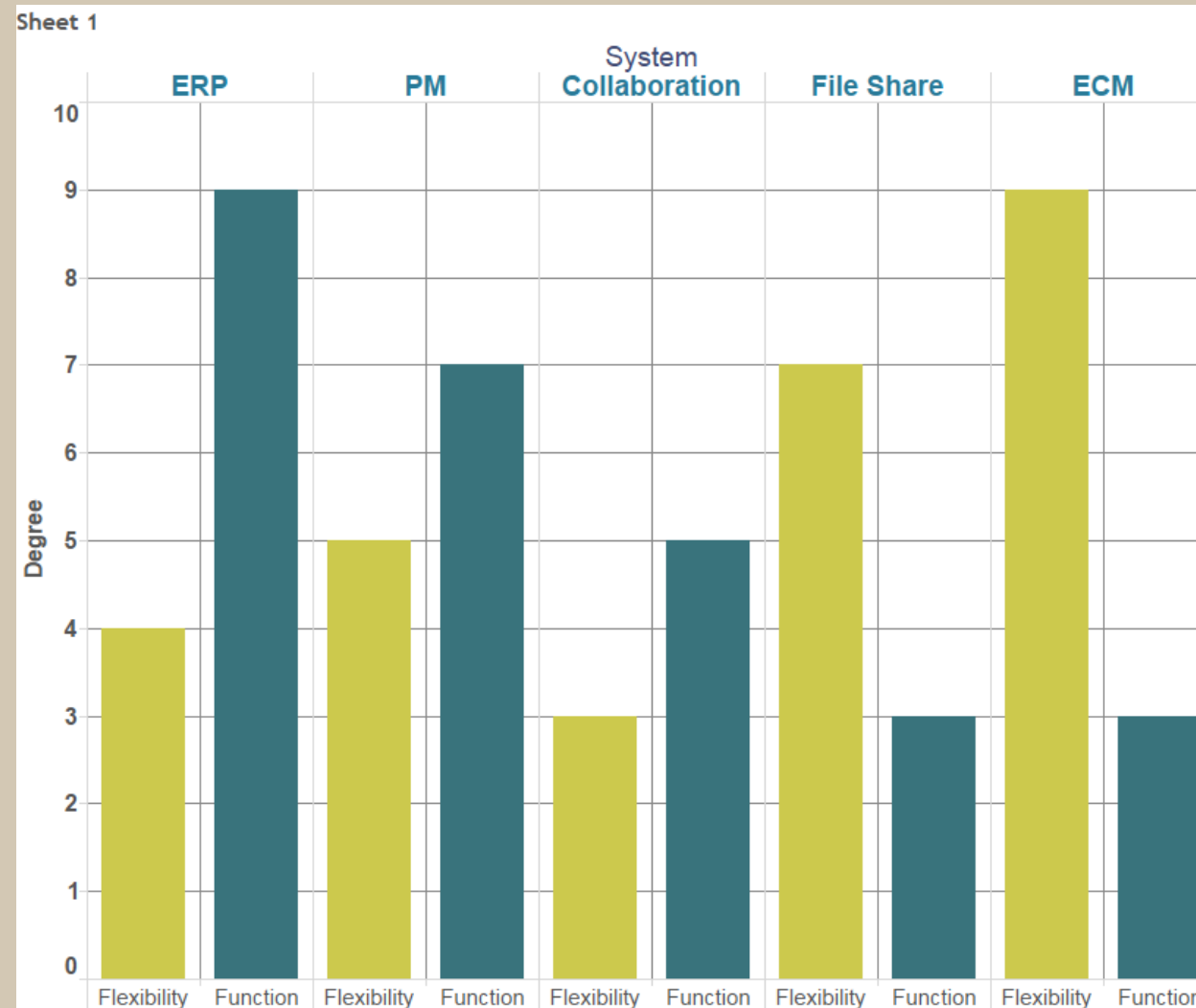
- **Processes** – RFI, Submittals, Meetings, Inspections, change orders, procurement
  - Multiple steps, structure, compliance
- **Documents** – Output, distribution
  - Content storage
- **Data** – The values from the form
  - Validation, integration, reentry
- **Risk/awareness** – Alerts, messaging, portal, visibility
- **Compliance** – Transparency, audit trail
  - OSHA, Owners, LEED, Unions, Fed, Audit, State



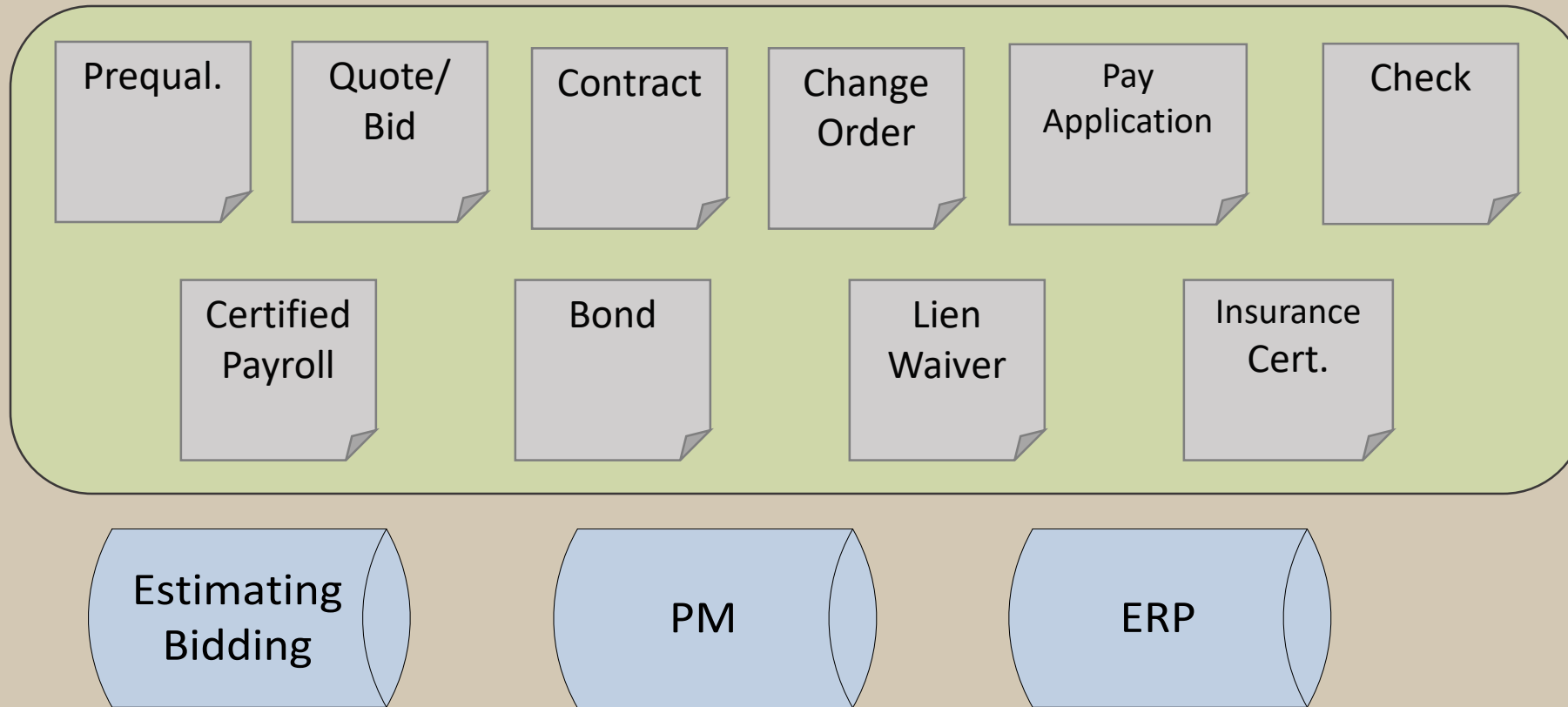
# Overall Application Footprint



# Platform Flexibility versus Function



# A Single Process: Subcontract Management



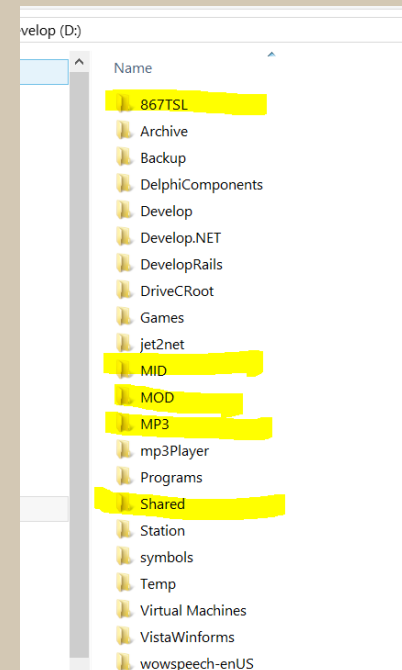
- Documents
- Approvals
- Data entry
- Compliance



# Content Storage

- Network drives
- SharePoint
- Product repositories
- Cloud-based storage (EFSS)
- ECM solutions

*Tools like Cloud Storage Gateways are being used to move content around and deliver content to job sites*



# Your Digital Content

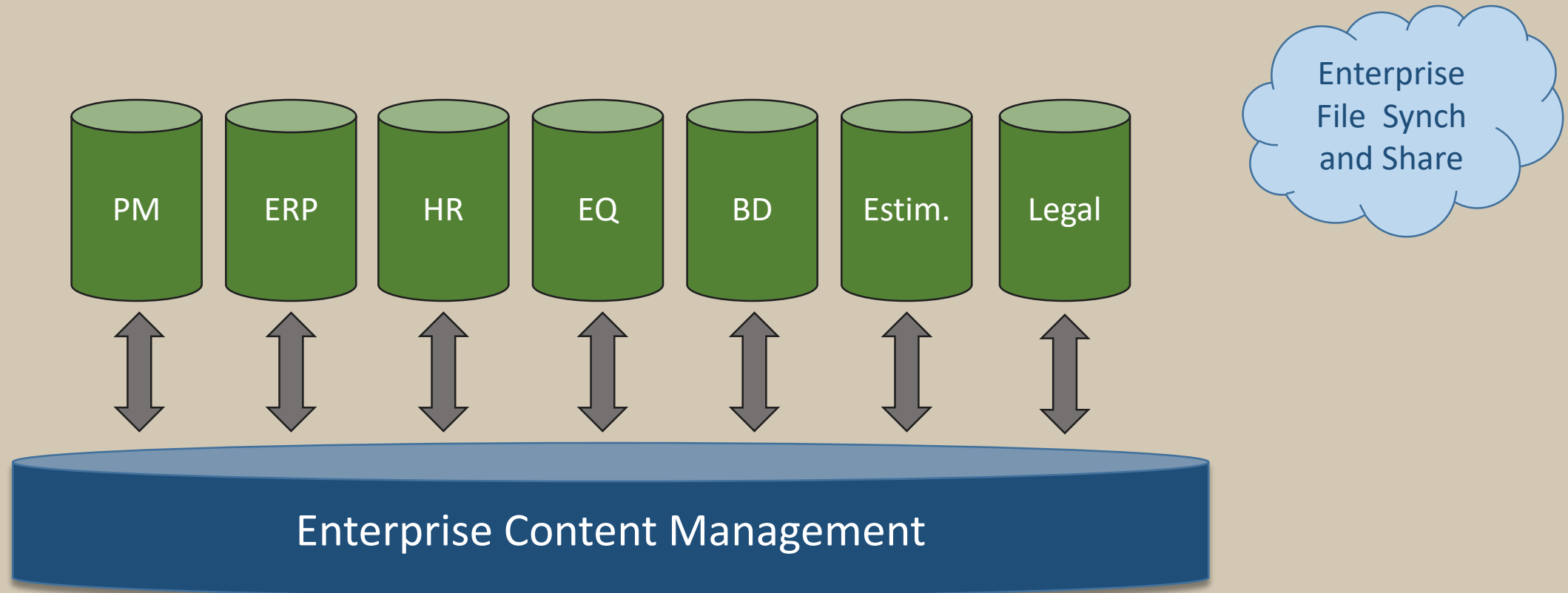
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- Should be non-negotiable
  - Claims and discovery are **very** costly
- Should be stored with metadata
- Should be subject to security and record retention
- Accessible by “consumers” when/as needed
- Should not be placed somewhere by the user





# ECM v EFSS



## Enterprise Content Management

- Forms and workflow
- Indexing and metadata
- Audit trail
- Compliance
- Integration - APIs
- Bulk handling
- Extraction and delivery
- Record retention
- Geofencing
- Security and encryption

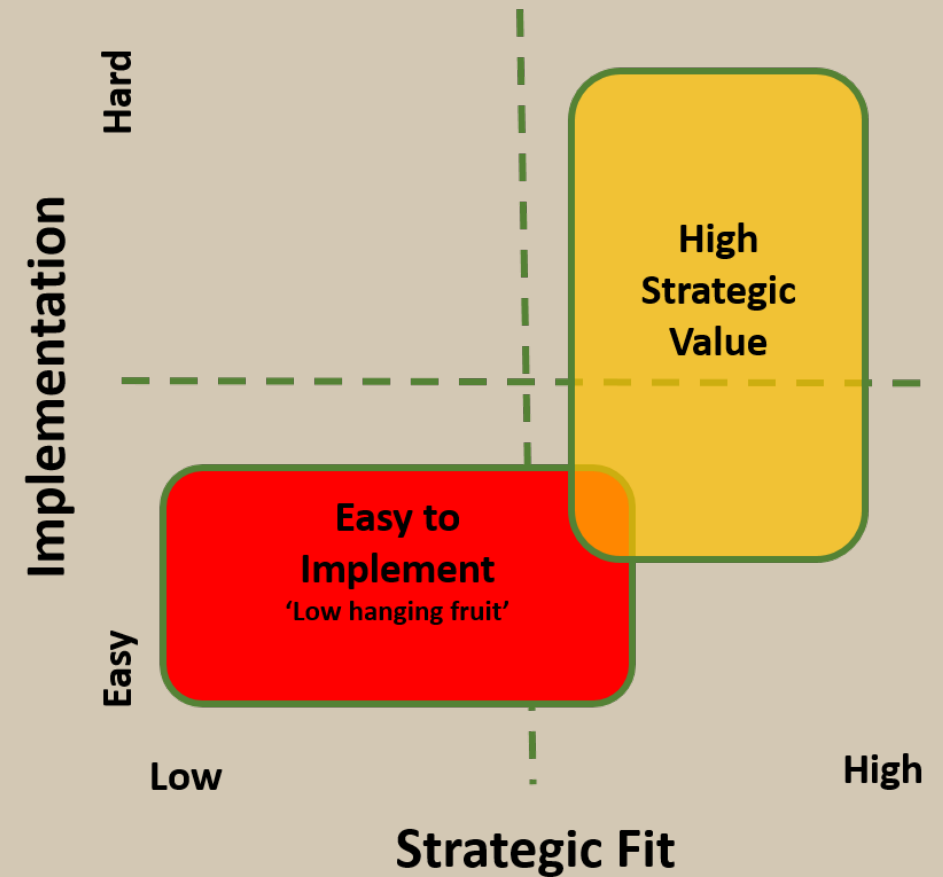
## Enterprise File Synch and Share

- Integration
- Security and Encryption
- Geofencing
- Version control
- Viewers



# Where Returns?

- Invoice processing
- Time sheets
- Billing back-up
- Onboarding/HR
- Job close-out
- Contracts
- Procurement
- Service Work Orders



# What Should You Do

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- Will you implement an enterprise solution?
- Will you enforce standardization?
- Where and how will you store content?
- How significantly do you need collaboration?
- How significant is BIM and related tools to operations?
- For larger organizations, consider document specialist



# What Should You Do

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- Build awareness within your organization
- Develop document/file retention policy
- Begin to raise awareness of IT governance
- Develop a process orientation in your systems design
- Operations has to lead the charge...IT in supporting role



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So, excited and clear about solving a significant problem in your organization?





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