

Managing Information Overload

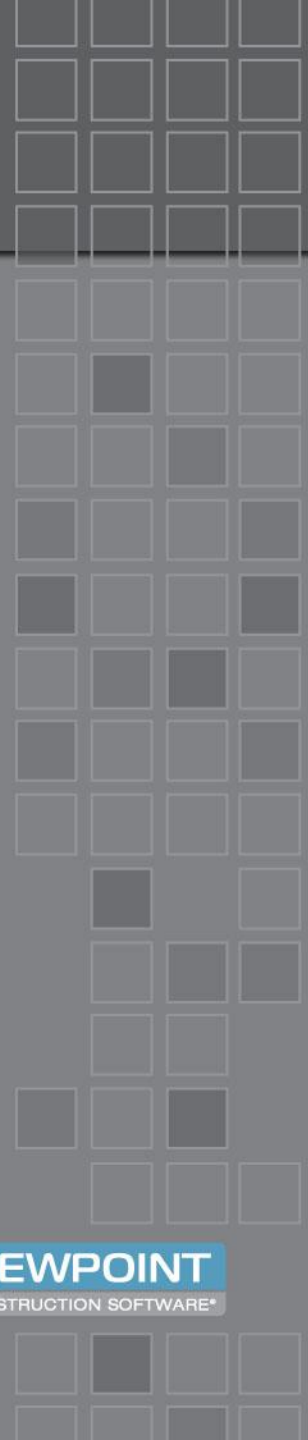
Transitioning to a Paperless Environment

CONSTRUCTION
BUSINESS OWNER



VIEWPOINT
CONSTRUCTION SOFTWARE®

Speakers



Tim Gray
Market Development Manager
Viewpoint Construction Software

Tim Gray is the market development manager for Viewpoint Construction Software's Western Region. Gray has over 22 years of professional accounting experience with a construction industry focus since 1998. He obtained his CPA while working with Ernst & Young and PWC.



Kathleen Schneider
President
Richman Knoll Associates

Kathleen Schneider is the president of Richman Knoll Associates. With 20 years' experience as a company officer for a third party administrator, SRC – An Aetna Company, she understands challenges faced by business owners to increase profitability and streamline operations in the complex contracting environment.

Business Intelligence (BI)

As Defined:

Converting **capabilities into knowledge**, getting the right information to the right people, at the right time, via the right channel.

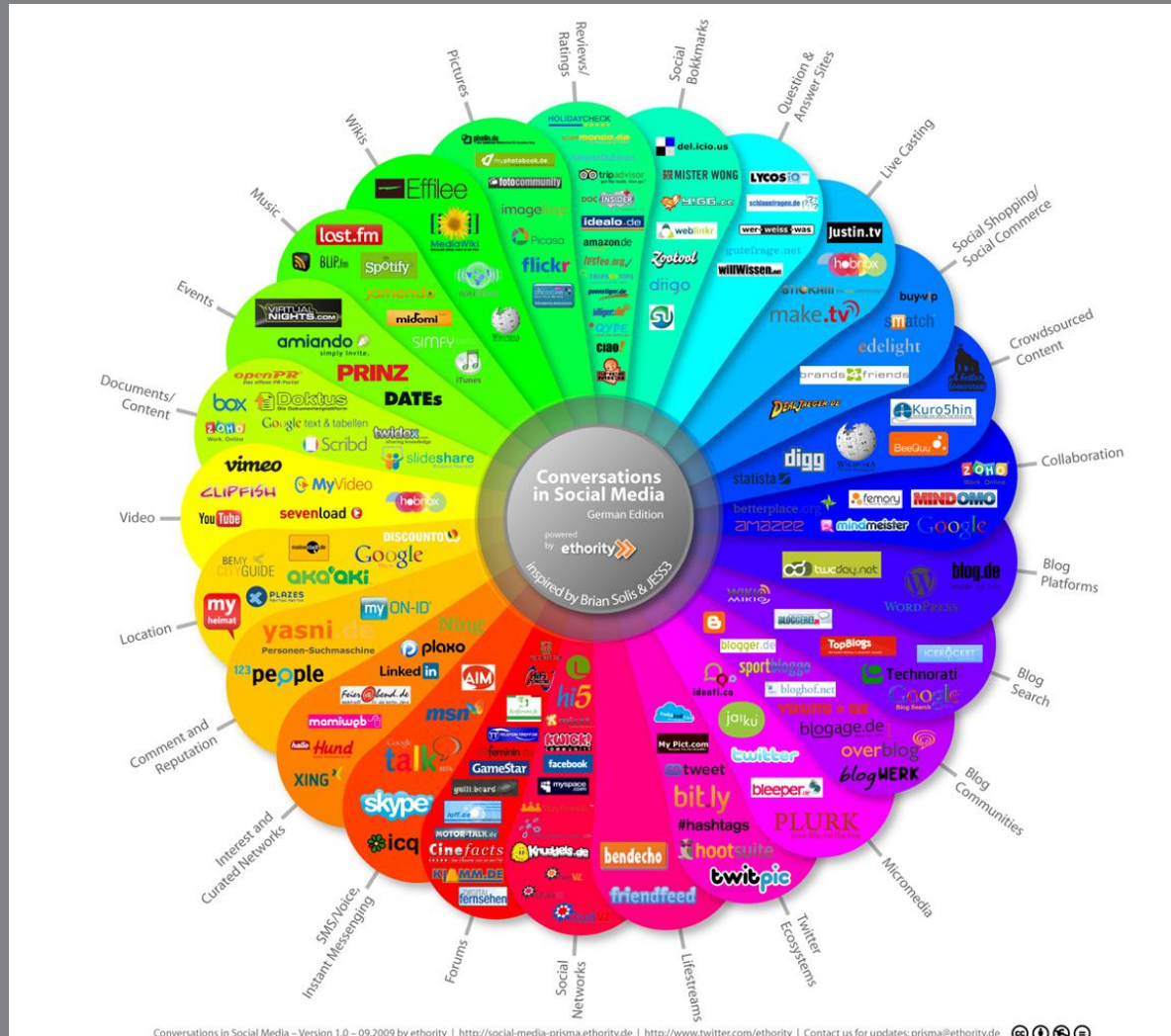
Business Intelligence (BI)

“Every two days now, we create as much information as we did from the dawn of civilization up until 2003.”

Eric Schmidt

CEO, Google

Business Intelligence (BI)



VIEWPOINT
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Average \$10 Million Project

DOCUMENTATION

- 50 document types
- 56,000 pages
- 25 banker boxes
- 6 @ 20" dia., 50' tall trees of paper

COLLABORATION

- 420 companies, suppliers, trades, etc.
- 850 individuals

5 Key Planning Areas



Identify the Process



Organization



Storage



Security



Retention

POLLING QUESTION #1

Does your company have a strategy to handle your paper/digital BI?

- Yes
- No
- Maybe
- Not Sure



Identify the Process

1. Assess where you are in the paper/digital process



Where are you today?

Paperless?





POLLING QUESTION #2

Estimate your % of a paperless environment:

0 - 30%

31-60%

61-90%

Over 90%

Not Sure



Identify the Process

1. Assess where you are in the paper/digital process
2. Identify your sources of information (both internal and external)
3. Indicate the received/created format



Identify the Process

1. Assess where you are in the paper/digital process
2. Identify your sources of information (both internal and external)
3. Indicate the received/created format
4. Filter the documents

Ask: *Is this BI to the company?*



Organization

1. Evaluate your current organization level



Paper Environment



Unorganized

Organized





Digital Environment



Unorganized

Organized





Organization

	Unorganized	Organized
Digital		
Paper		



Organization

	Unorganized	Organized
Digital		
Paper		



POLLING QUESTION #3

How would you rank your current organization level?

A mess – hard to find anything

Unorganized – can find items, just takes a long time

Organized – most of the items are easy to find

Very organized – very fast and very easy to find items

Not Sure



Organization

1. Evaluate your current organization level
2. Consider a document management system



Organization

Content Manager Web Access - Construction Imaging - Windows Internet Explorer

http://demo2.portcityconstruction.com/contentmanager/

Content Manager Web Access - Construction Imaging

Home

New Document | Open Batch | Create Batch | User Settings | Help | Refresh Worklist | Logout

Content Types

- My Worklists
- APENTRY
- ARCHECKS_VP
- ARENTRY_VP
- CDMCHECKS
- E-MAIL
- EQUIP
- HR
- HR_VP
- JOB_PHOTOS
- JOBFILES
- JOBFILES_VP
- LEGAL
- PROJECT_ARCHIVE
- PROPERTY_MANAGEMENT
- SHAREPOINT_ARCHIVE

APENTRY | ARCHECKS_VP | ARENTRY_VP | CDMCHECKS | E-MAIL | EQUIP | HR | HR_VP | JOB_PHOTOS | JOBFILES | JOBFILES_VP | LEGAL | PROJECT_ARCHIVE | PROPERTY_MANAGEMENT | SHAREPOINT_ARCHIVE

Drag a column header and drop it here to group by that column

INVOICE_TYPE	VENDOR_NAME	VENDOR#	INVOICE#	INVOICE_DATE	AMOUNT	DIVISION	JOB #	EQUIP_#	PLANT_#	PO_SUB #	STATUS
JOB	ACME PLUMBING & HARDWARE	1110	131811	2010-06-30	230.25		1002				WIP
JOB	LIBERTY PLUMBING	1125	1777	2012-06-05	3828.68		1002-			21777	WAITING
JOB	RICK'S GARDEN CENTER	528	1865	2010-10-21	108.60		1002			21861	WAITING
JOB	BURCH FLOORING	1105	35001	2004-02-02	751.00		1002				WAITING

Internet | Protected Mode: On

11:48 AM 6/8/2012

Organization

Home Document

Save Close Attach Page Attach All Pages Notes Email Export Route Approve Review Disapprove WIP Archive Return to Accounting Return to Previous Document History Commitment Pull Custom Search

Header Fields

Field	Value
INVOICE_TYPE	JOB
VENDOR_NAME	LIBERTY PLUMBING
VENDOR#	1125
INVOICE#	1777
INVOICE_DATE	06/05/2012
AMOUNT	\$3,828.68
DIVISION	
JOB #	1002-
EQUIP_#	
PLANT_#	
PO_SUB #	21777

Liberty Plumbing
Feel Free to Shop with Us!

2635 Independence Drive
Rocky Mount, NC 27804
Phone 252-443-1000 Fax 252-443-1001

TO:
Accounts Payable
Port City Construction
4622 Cedar Ave
Wilmington, NC 28403
910-937-2426

INVOICE

INVOICE #1777
DATE:06/05/2012

SHIP TO:
Job 1002-
First Avenue Middle School
301 South 1st Avenue
Arcadia, CA 91006

COMMENTS OR SPECIAL INSTRUCTIONS:

SALESPERSON	P.O. NUMBER	REQUISITIONER	SHIPPED Date	Truck	TERMS
H Pelman	21777	WESB		T5690	Net 30

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL

Application: APENTRY Page 1 of 1 Version 1 of 1 Zoom At 100 %

Details - (Amount remaining: \$3,828.68)

LINE TYPE	JOB#	PHASE	COST TYPE	DIST AMOUNT

Organization

The screenshot displays a software interface for document management. At the top, there are tabs for 'Home' and 'Document'. Below these are various action buttons such as 'Save', 'Close', 'Attach Page', 'Attach All Pages', 'Notes', 'Email', 'Route', 'Approve', 'Review', 'Disapprove', 'WIP', 'Archive', 'Return to Accounting', 'Return to Previous', 'Document History', 'Commitment Pull', and 'Custom Search'.

On the left side, a 'Header Fields' table is visible, containing the following information:

Field	Value
JOB#	1000
JOB NAME	FIRST AVENUE HIGH SCHOOL
JOB ADDRESS	8726 MADISON STREET
COMPANY	COMPANY1
DOCUMENT TYPE	DRAWING
DOCUMENT DATE	12/05/2007
DESCRIPTION	BRACE FRAME
KEYWORD	
SECURITY	0
VENDOR #	
VENDOR NAME	
MASTER KEY	
WORKFLOW	
DRAWING #	BRACE FRAME

The main area of the interface shows a technical drawing of a garage entrance, divided into several sections:

- Section 1: PERIMETER FOOT** - Shows a cross-section of a concrete foundation with dimensions like 3'-0" and 1'-0".
- Section 2: TYPICAL MAT SE** - Shows a cross-section of a mat with dimensions like 4'-0" and 1'-0".
- Section 3: PERIMETER FOOT FRONT WALL** - Shows a cross-section of a wall with dimensions like 4'-0" and 1'-0".
- Section 4: PARTY WALL & GARAGE** - Shows a cross-section of a wall with dimensions like 4'-0" and 1'-0".
- Section 5: GARAGE ENTRANCE** - Shows a cross-section of a garage entrance with dimensions like 6" TO 10.5" and 2'-8".
- Section 6: WALLS & CORRIDOR** - Shows a cross-section of a wall with dimensions like 6" TO 10.5" and 2'-8".
- Section 7: PARTY WALL & GARAGE** - Shows a cross-section of a wall with dimensions like 4'-0" and 1'-0".

A red arrow points from the 'Notes' field in the header table to a yellow box labeled 'Notes' in the drawing area. The drawing area also contains various annotations and dimensions.

At the bottom of the interface, there is a status bar with the following information:

- Application: JOBFILES
- Page 1 of 7
- Version 1 of 1
- Zoom At: 50%
- 200 dpi



Organization

1. Evaluate your current organization level
2. Consider a document management system
3. Identify document types/groups/categories
4. File naming convention
5. What format is needed (i.e. OCR required)?



Organization

1. Evaluate your current organization level
2. Consider a document management system
3. Identify document types/groups/categories
4. File naming convention
5. What format is needed (i.e. OCR required)?
6. Consider how you would search for documents in the future



Organization

When you search for information will this be your situation?



Your





Storage

1. Control where permanent BI will be stored
2. Determine where temporary BI is allowed – laptops, thumb drives, CDs, email, server only, etc.



Storage

1. Control where permanent BI will be stored
2. Determine where temporary BI is allowed – laptops, thumb drives, CDs, email, server only, etc.
3. Identify a BI back up process
4. Create a disaster recovery plan
5. Develop a process to restore data when needed and test regularly



Security

1. Develop security roles and groups
2. Determine what BI requires security restrictions



Security

1. Develop security roles and groups
2. Determine what BI requires security restrictions
3. What information can be accessed remotely?
4. Who can access from outside the company?
5. Identify BI that requires encryption



Retention

1. Create a retention policy for your BI that is rigorously and consistently applied



Retention

1. Create a retention policy for your BI that is rigorously and consistently applied
2. Develop retention requirements for each BI type/group
3. Identify jurisdictional requirements along with company needs



Retention

1. Create a retention policy for your BI that is rigorously and consistently applied
2. Develop retention requirements for each BI type/group
3. Identify jurisdictional requirements along with company needs
4. Indicate the length of time to archive and purge and assign to the BI type
5. Determine the frequency and period to archive and purge

In Closing...

Ask yourself this question:

In the year 2020 will someone be able to find the BI from work being done today?

You can't afford to wait.

Start your plan today.

Q & A

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www.viewpointcs.com

800-333-3197

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to all of the questions asked during the Q&A session.

