

TOP 5 DOCUMENT MANAGEMENT SOLUTIONS

Remember when contractors focused on construction, not paperwork? Construction document management software can restore the balance.

By Scott Zieg

Across the country, contractor's offices and construction trailers are overflowing with boxes of documents and teams of office engineers whose job it is to control the documentation associated with modern construction. The mountain of documents associated with a contract include certificates of insurance, subcontractor agreements, large format drawings, notices to proceed, invoices, and more. Organizing and leveraging this information is a formidable challenge that, all too often, is accomplished by increasing clerical resources and office space.

There is a better way. With construction document management software, contractors can gain new levels of control around the data and information required to manage a construction project. Imagine having 24/7 electronic access to all of the documents associated with a project, combined with digital markup and stamping technology, plus freedom from stockpiles of paper in your office, and the capability to reduce the clerical overhead associated with your projects. Here are five examples of how construction document management can improve your organization.

1. Make information findable

Every day, employees across the company are looking for the information they need to perform their jobs. Activities such as responding to requests for information, processing invoices, and handling claims involves finding the associated information and then processing the request. Studies have shown that with information workers performing similar tasks, nearly one half of those workers spend 2 hours per day simply tracking down the information they need to do their jobs.

With a construction document management system in place, documents are stored electronically and include basic indexing information that allows users to quickly find and retrieve information from their desks. This increases overall efficiency by reducing the time it takes for people to find information and complete their task at hand. Electronic documents can be easily e-mailed or distributed through the Web, eliminating time copying and/or shipping documentation to the requestor.



2. Know your document's life cycle

Documents are not static, and this is especially true with construction drawings (as-builts) and project plans. Documents change over time in life cycles that can include everything from document creation, to iterative revisions, to reviews and approvals, markups, and so on. Maintaining a complete history of a company's documents' life cycle ensures total control over documents.

With document auditing and version control, accessing prior versions of documents is made easy because versions of documents are stored together in a consistent naming standard, eliminating the confusing hodgepodge of manual naming conventions often used. In

addition, the auditing component records all instances of access to the documents, maintaining a full history, including file reads and edits, and including the user's name and date timestamp.

3. Archive your e-mails securely

Like it or not, at many construction companies e-mail has become the preferred way to communicate among employees, subcontractors, vendors, and owners. It's fast; it's convenient; and it's easily referenced later. Unfortunately, many people incorrectly believe that e-mail is only an informal means of communication—this is not true. When e-mail is used to transact change orders, approvals, or to communicate critical project information, e-mail must be maintained.

A contractor's e-mail inbox contains project specific information that needs to be shared and will need to be included as a permanent record for the project. By including an e-mail archive component in the construction document management deployment, contractors can be assured that all inbound and outbound e-mails are electronically captured at the server level. E-mail records can then be quickly researched and retrieved for everything from resolving disputes to handing off project information.

4. Teach an old computer new tricks

Contractors are busy juggling any number of activities and

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responsibilities. The last thing they want is to help usher paperwork through complicated approval processes. Manual document workflow processes have a tendency to breakdown requiring workers to intercede in a process to determine what's causing the hold up. This process consumes precious resources, provides zero auditability, and ultimately leads to frustration for all of the parties involved.

Automating workflow removes the need for people to manage processes, allowing individuals to focus on their core responsibility. In addition, workflow processes improve overall scheduling by ensuring tasks are started based on the time and sequence prescribed in the workflow. The flow of documents is handled automatically, which not only establishes consistent processing of information, but also shortens cycle times and increases the quality and accuracy of repeatable business processes.

5. Simplify project completion and document turnover

Closing out a construction project is historically an expensive paper and labor intensive ordeal. Activities including handling claims, recovering retainer fees, and delivering as-builts with supporting maintenance documentation can take weeks to complete. Without the assistance of a construction document management system, the tasks of gathering, organizing, and archiving the countless filing cabinets worth of documents eats away at the potential profit.

In contrast, imagine having all of the documents associated with the job organized electronically with supporting metadata allowing users to easily determine document types and whether specific documents are required to be included in the document turnover package. As a project is completed, the document turnover process can be as effortless as exporting the project files directly to a DVD or thumb drive. In addition to providing for an efficient document turnover process, building owners appreciate receiving the documents required for maintaining their new facility in a fully-indexed, searchable format, saving them time and storage requirements as well.

survival during tougher economic times. Considering a document management system that is designed to meet the specialized needs of construction and engineering companies is a logical first step. Improvements to a cost structure for a project enables contractors to provide competitive bids, thereby improving overall chances of success and increased profits.

Construction document management

systems, such as ColumbiaSoft's Document Locator, provide solutions for document scanning, workflow automation, digital stamping, version control, 24/7 Web access, e-mail management, and more. If contractors are interested in returning their company's focus to managing construction rather than document control, researching how construction document management can help is recommended. ♦

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