INEIGHT

8 MUST-HAVES
WHEN PURCHASING A CONSTRUCTION DOCUMENT MANAGEMENT SYSTEM

PROVEN PROJECT CERTAINTY.

InEight®
DOCUMENT

EVALUATE WITH CARE

As you're thinking through your requirements for a construction document management system, give special consideration to a few areas that make the difference between a system you can live with and a solution that drives successful outcomes.

Most enterprise-grade document management software delivers core capabilities that you should consider table stakes, but not all systems handle the complexity and changeability of your business and workflows equally well. In particular, the eight areas discussed here deserve careful evaluation against the demands of your business. Keep your future needs in mind as well; a careful investment in the right solution will serve you effectively even when the business environment shifts and your strategy adapts to changing times.

8 MUST-HAVES

When purchasing a construction document management system, look for these must-have features essential to the construction and operations of large-scale capital projects.

1 Attribute-Rich Data Capture
For project documents, the ability to collect project data in batches while automatically extracting attributes can reduce document capture time by 75%.

2 Comprehensive Search Functionality
Searching becomes even easier with dynamic folders allowing you to go a level deeper than the standard folder trees in most systems.

3 Flexible Document Review and Approval
In order to increase accountability and ensure project items keep moving forward, you need a system that tracks exactly where in the review-and-approval workflow documents currently stand.

4 Debate-Proof Document Distribution
One of the biggest problems on any project is ensuring the extended project team has access to the most recent documents.

5 Integrated Email Repository
In order to achieve user adoption on your projects, your document system needs to serve as a central repository for use in capturing and accessing all the project emails in one place.

6 Adaptable Workflows
It's important your system allows you to configure workflows consistent with your best practices.

7 Advanced Analytics
You need a system that gives you the insights to provide clear and actionable status reports.

8 Comprehensive Configurability
No two businesses are the same, so why settle for a system that manages all customers the same way?

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Reduce document capture time by 75%.

ATTRIBUTE-RICH DATA CAPTURE

Historically, accurately capturing project documents and data has been cumbersome and prone to error, resulting in information that can be difficult to find. Do the systems you are evaluating provide both one-off and batch tools for quickly and efficiently capturing project data? For project documents, the ability to collect project data in batches while automatically extracting attributes can **reduce document capture time by 75%.** Whether this includes

parsing attributes from the file name, pulling data from within the embedded header (PDF and DWGs) or scraping information out of a title block, automating the collection process is critical to capturing the right data quickly. The most feature-rich systems even support the use of multiple file types representing the same document in order to support the optimal file type for viewing, editing and distributing documents.

COMPREHENSIVE SEARCH FUNCTIONALITY

The average construction professional spends 5.5 hours a week just searching for project documentation. While most of the document management solutions available aim to improve that number, the most advanced systems can conservatively cut that in half. There are a variety of methods currently available to help your organization improve efficiency when searching for documents. In your evaluation, determine if your organization would benefit from locating documents by using one or more of the following: Google-like search, filter information using attributes, navigate documents through related links, or access files in a folder tree.

Searching becomes even easier with dynamic folders allowing you to go a level deeper than the standard folder trees in most systems. With dynamic folders, users can define entire populated folder hierarchies based purely on the attributes associated with each project item. Imagine in a single click being able to switch your folder view to show every document organized by Discipline – Status – File Type, and with a second click to a folder tree customized to your specific organization.

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FLEXIBLE DOCUMENT REVIEW AND APPROVAL

Ensuring project documents have been properly reviewed and approved has traditionally been accomplished by email. Using email for review and approval inevitably will result in delays, missed approvals and a lack of historical record. The majority of document management systems available will look to improve upon the review and approval process, the key is to select a system that will work with your organization's current technology and accessibility requirements.

Look for a system providing comprehensive workflow tools for initiating, reviewing (mark-up and commenting), approving and distributing those documents. Will you need your new project software to integrate with mark-up tools such as Bluebeam? Does your organization require sequential and parallel approval processes? **What if you need to route documents to outside of your organization for review or approval, will you be able to add additional users/contributors without setup or licensing costs?**

Most importantly, in order to increase accountability and ensure project items keep moving forward, you need a system that tracks exactly where in the review-and-approval workflow documents currently stand and keeps a record of every time that document has been touched.

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> One of the biggest problems on any project is ensuring the extended project team has access to the most recent documents.

DEBATE-PROOF DOCUMENT DISTRIBUTION

One of the biggest problems on any project is ensuring the extended project team has access to the most recent documents. Project-driven organizations need a system that not only uses electronic transmittals, but also packages to distribute links to the latest documents and project items to the right people.

Systems with the ability to deliver packages notify distributers when documents contained in past distribution have been updated and guides them through the distribution of any addendum. As an additional benefit, every step of the process is audited, so any debate as to whether someone got the latest document becomes irrelevant.

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In order to achieve user adoption on your projects, your document system needs to serve as a central repository for use in capturing and accessing all the project emails in one place.

INTEGRATED EMAIL REPOSITORY

A typical project has thousands of associated email messages. Generally, these emails are separate from other project items, and it is difficult to find and capture missing key information. **In order to achieve user adoption on your projects, your document system needs to serve as a central repository for use in capturing and accessing all the project emails in one place.** From this central repository, users can create specific email templates to ensure all relevant information is captured and nothing falls through the cracks. If your team members still prefer to use Outlook, you need a document management system with an out-of-the-box plug-in for Outlook to allow users to send and review emails directly from Outlook.
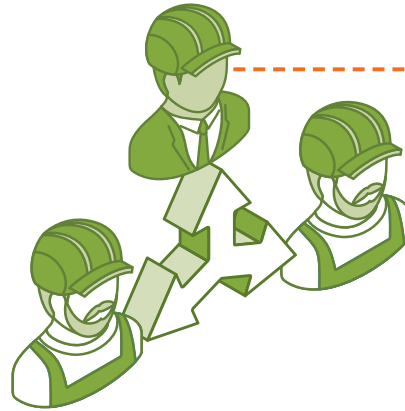
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It's important your system allows you to configure workflows consistent with your best practices.

ADAPTABLE WORKFLOWS

Email-based construction workflows are fraught with inefficiency and delay. Another must-have feature worth evaluating before selecting a document management system, is a system's ability to design and manage project item workflows. The management, approval and analysis of project RFIs, submittals and other construction workflows can vary from project to project (you may even have multiple RFI workflows within a single project) and **it's important your system allows you to configure workflows consistent with your best practices.**

Does the system you are evaluating provide users with the ability to configure design templates to capture and track the right information their team needs to create, review and respond to construction workflow forms? What about automated discipline-centric workflows to streamline the approval process and ensure the correct reviewer is notified at the right time? Does the system provide a complete audit trail of events and actions for every project item workflow? All of these critical factors need to be analyzed when evaluating which system is the best fit for your business processes.
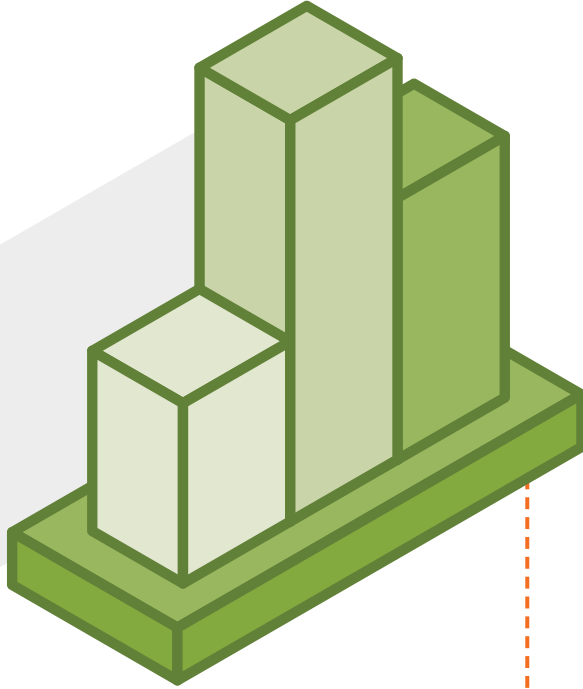
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ADVANCED ANALYTICS

The ability to understand how a project is performing is arguably the most important component of a project management system. With so many various stakeholders involved on a given project, **you need a system that gives you the insights to provide clear and actionable status reports.** Look for a system that includes reports and dashboards for instant visibility into the health of a project. What is the RFI backlog, how many emails are awaiting a response, how many overdue workflow items exist, and many other questions can be answered instantly with a system that includes advanced dashboards and reports.

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COMPREHENSIVE CONFIGURABILITY

No two businesses are the same, so why settle for a system that manages all customers the same way? Your platform needs to be configurable to the unique needs of your processes. Whether it's configuring the attributes collected for each project, the templates used to kickstart a new project, email templates, form templates, checklists, crucial reports and dashboards, or any number of other items, choose a solution that aligns to your unique requirements and best practices.

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CHOOSE CERTAINTY

The wrong document management software adds time and difficulty to every project, but the right one speeds your workflows, slashes opportunity for error, and saves valuable time at every stage of construction.

As you define your requirements, look for a solution that flexibly matches your workflows and needs, boosts your team's efficiency, and delivers the adaptability you need in the face of constantly shifting business demands. Vet your solution, vet your vendors, and set your company up for project certainty.

INEIGHT® DOCUMENT

InEight Document is the most comprehensive construction document management and control solution available today. With industry-leading capabilities related to capturing, finding, managing, distributing and analyzing construction project data, InEight Document's web- and mobile-based solution provides industry-leading breadth and depth of functionality for capital projects of any size. Additionally, InEight Document's intuitive interface, training programs and best-in-class services organization ensure teams are productive within days and optimized to support organizational best practices in just a few weeks.