



NATIONAL
COLLEGIATE
FM 2007
TECHNOLOGY
CONFERENCE

Lessons Learned Implementing Document Management

Presented By:



Glenn A. Seehausen

President / CEO

glenns@acad-plus.com

281-890-3300 x 201

The Audience



- How many of you do document management (DM)?
 - Trick Question, the answer is everyone, but you might be using Windows Explorer for DM.
- How many already use a database driven DM system?
- How many are in a department dedicated to providing DM to the organization?

The Presenter



- Began ACAD-Plus in 1986
- Some of you know us for our CAD related products and services, we are also provide Document Management (DM) products and services.
- In fact, ACAD-Plus single largest area of business is DM.
- We have 16 years of experience implementing DM solutions.
- We specialize in DM implementations in Large Facilities Environments, particularly higher ed.

Our Customers

(Partial Listing)



- University of Texas Medical Branch (UTMB)
- California Institute of Technology (Caltech)
- Massachusetts Institute of Technology (MIT)
- Stanford University
- University of Southern California (USC)
- Cal State University – Fullerton & Long Beach
- University of Connecticut
- University College of London
- Dalhousie University (Canada)

What movie is this from?



The needs of the many outweigh the needs of the few...or the one.

Defining Document Management



- **Repository:**

- Give us a way to store our documents...

- consistently,
- and securely,
- with descriptive data,
- so everyone can find them quickly and easily,
- and view, print, or possibly redline them.

THIS WILL BECOME INACCURATE

- **Workflow:**

- Give us a way to...

- control the way documents flow through our organization,
 - approvals / gate keeper
 - email notifications
 - tracking project phases, concurrent engineering
- so everyone knows the status of all documents and the complete history is preserved.

IF THIS IS DONE POORLY

Top 6 Lessons Learned



1. Metadata quality determines 95% of the users perception of the solution.
2. The DM System should leverage other systems and data.
3. Most documents should be put into the system by the author or receiver.
4. The documents should be put into the system promptly upon creation or receipt.
5. Document security is critical.
6. Workflow is important.

Metadata Quality Is Critical



- Metadata Quality determines 95% of the users perception of the solution.
- Documents are “consumed” more than they are “produced”.
- Documents can’t be found if the metadata is bad.
- Therefore users will become frustrated with the system and complain.
- Management will not continue funding improvements if they hear lots of complaining about the system.
- Management is likely a primary “consumer” of the documents.

Leverage Other Systems and Data



- Examples:
 - Location Data - Space Management System
 - Project Data - Project Management System
 - Equipment Data - Maintenance Management System
- Ensures Consistency
 - Ideally the systems can be bi-directionally interfaced.
 - At the very least, common values can be used when searching the various systems.

Author/Receiver Should Load Most Documents



- Others can not describe the document very well...which leads to bad metadata.
- By the time the author/receiver communicates the correct metadata to someone else, they could have loaded it themselves.
- Authors/Receivers will not use the system unless it is...
 - quick and easy to use, and
 - logically structured with comprehensive lists.

Load Documents Promptly



- Delaying until the project is finished robs the organization of a large part of the value... because documents are more frequently needed **DURING** the project than **AFTER** the project.
- Delaying leads to lower quality data because...
 - The documents never get loaded at all (users move on to put out the next fire), and
 - users forget what the document is so they describe it less accurately.

Document Security is Important



- Contributors will not put documents in the system if they fear they will be visible or editable by inappropriate users.
- The system should determine the security automatically based on the document metadata.

Examples:

- If it is related to a “secure” building it should automatically know that fewer users can access it.
- If it is related to a “secure” department like Human Resources, only HR people can view it.

Workflow is Also Important



- Good workflow encourages the use of the system because it HELPS them do their job.
- Bad workflow causes users to avoid the system because it does not match their business process.
- Without good workflow the system will revert to an “archiving” solution (see Lesson 3 and 4).
- Some of the critical metadata is determined by workflow.
 - Example: Using an early submittal drawing instead of the IFC version could lead to costly mistakes.

Summary



The needs of the many outweigh the needs of the few...or the one.