



Facilities Document Management in COVID Times – Transitioning to a Cloud-Based System

WELCOME

Moderated by: **Mike Antill**, CORT
Co-Chair Learning & Professional Development



Hosted by: CQI Associates and IFMA Chesapeake Chapter

WEBINAR
PRESENTE
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Vivica Williams,
President,
archSCAN, LLC

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Upcoming Events:



March:
Quarterly Workshop Panel
Discussion - Indoor Air
Quality in the Time of
COVID

Date: Wednesday, March 24, 2021
Time: 12:00 PM – 1:00 PM
Location: On Line Workshop



April:
Virtual “ Best Practice Idea
Exchange” – An Open
Discussion Forum

Date: Wednesday, April 14, 2021
Time: 8:30AM – 9:30AM
Location: Virtual Zoom Platform

Visit the chapter website for more details and to register to attend events www.ifmachesapeake.org

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- ❖ North America-based, international construction services company and a leading builder in diverse and numerous market segments.



- ❖ Schneider's purpose is to empower all to make the most of our energy and resources, bridging progress and sustainability, ensuring Life Is On everywhere, for everyone, at every moment.



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MEET YOUR PRESENTER



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Plan Room Librarians

Organizing, digitizing, and
managing facilities documents.

Ms. Vivica Williams is the president of archSCAN. She has been working in the document management industry for 16 years. She understands the challenges that facilities managers face when dealing with documents and drawings. Helping facility managers transition from paper-based to electronic-based document management is her specialty.



Better Document Management Practices in Covid Times

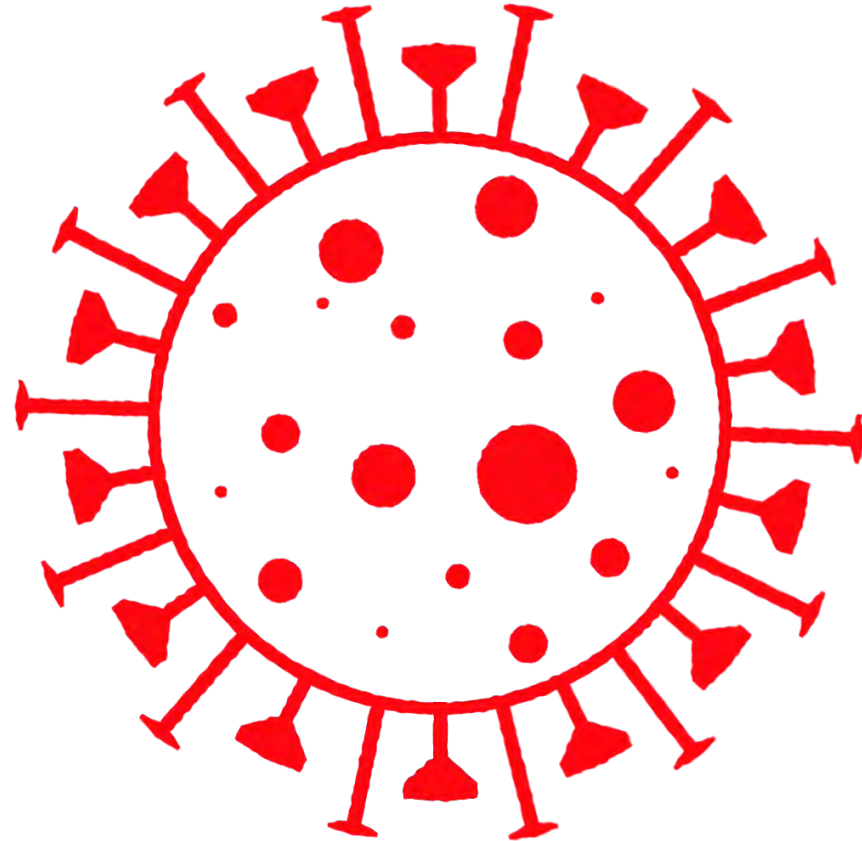
Transitioning to Cloud-Based Document Management

Upon completion of this Program, you will be able to:

- Identify dangers that come with poor document management of building/construction documents
- Improve building operations through implementing a cloud-based document management system
- Understand the steps involved with a digital transformation
- Calculate the Return On Investment

COVID-19 has changed
EVERYTHING.

- Work From Home
- Reliance on Digital Documents
- The Need to Move Documents to the Cloud
- Old Filing Systems are Painful and Do Not Work





- Mix of documents located in different places
 - Banker Boxes
 - Flat Files
 - Rolled Plans
 - Oh my!
- Documents older than 15-20 years are almost always in a paper-only format
- Building documents need to be kept indefinitely
- Most plan rooms are 70% paper and 30% digital



DEST2150	DEST2034	DEST2993	DEST2134	DEST208
DEST2151	DEST2035	DEST2994	DEST2135	DEST208
DEST2152	DEST2036	DEST2995	DEST2136	DEST208
DEST2153	DEST2037	DEST2996	DEST2137	DEST208
DEST2154	DEST2038	DEST2982	DEST2138	DEST208
DEST2155	DEST2039	DEST2983	DEST2139	DEST209
DEST2174	DEST2040	DEST2984	DEST2140	DEST209
DEST2014	DEST2041	DEST2985	DEST2141	DEST209
DEST2015	DEST2042	DEST2997	DEST2142	DEST209
DEST2016	DEST2043	DEST2000	DEST2143	DEST209
DEST2017	DEST2044	DEST2001	DEST2144	DEST209
DEST2018	DEST2045	DEST2002	DEST2145	DEST209
DEST2177	DEST2046	DEST2003	DEST2146	DEST209
DEST2178	DEST2047	DEST2004	DEST2147	DEST209
DEST2164	DEST2048	DEST2005	DEST2148	DEST209
DEST2165	DEST2049	DEST2006	DEST2066	DEST210
DEST2166	DEST2050	DEST2007	DEST2067	DEST210
DEST2167	DEST2051	DEST2008	DEST2068	DEST210
DEST2168	DEST2052	DEST2009	DEST2069	DEST210
DEST2019	DEST2053	DEST2010	DEST2070	DEST210
DEST2020	DEST2054	DEST2011	DEST2071	DEST210
DEST2021	DEST2055	DEST2012	DEST2072	DEST210
DEST2022	DEST2056	DEST2013	DEST2073	DEST210
DEST2023	DEST2057	DEST2986	DEST2074	DEST210
DEST2024	DEST2058	DEST2987	DEST2075	DEST210
DEST2025	DEST2059	DEST2988	DEST2076	DEST211
DEST2026	DEST2060	DEST2989	DEST2077	DEST211
DEST2027	DEST2061	DEST2990	DEST2078	DEST211
DEST2028	DEST2062	DEST2998	DEST2079	DEST211
DEST2029	DEST2063	DEST2999	DEST2080	DEST211
DEST2030	DEST2064	DEST2130	DEST2081	DEST211
DEST2031	DEST2982	DEST2131	DEST2082	DEST211
DEST2032	DEST2991	DEST2132	DEST2083	DEST211
DEST2033	DEST2992	DEST2133	DEST2084	DEST211

Electronic Files

- CDs, Thumb Drives
- Files on Server
- Files on Desktops
- Disorganized Servers
- Files in Proprietary Software Programs- AutoCAD, Revit

Often electronic messes are worse than paper ones

- Outdated file types
- Outdated media- CDs, 3 ½ disks, microfilm, thumb drives
- Poor file indexing

HARD TO ACCESS OR FIND

DANGERS ASSOCIATED WITH POOR DOCUMENT MANAGEMENT

Dangers of Poor Document Management in Facilities:

1. Poor response times when problems occur
2. Missing information for construction or renovation projects
3. Poor cross-functional collaboration-departments not communicating with each other
4. Damage to customer relationships
5. New employees cannot find answers to their questions



UNIQUE NEEDS OF FACILITIES DOCUMENTS

- Need to keep your documents indefinitely
- Drawings are HUGE
- Documents are usually located far from the job site
- Version control is hard to maintain. Are you working with the most up-to-date version?
- Critical information is difficult to find for in an Emergency

- 
1. Disasters Strike
 2. Retirement/New Staff or Management
 3. Renovating/Moving

#1 CATALYST FOR CHANGE



CORONAVIRUS

CDC

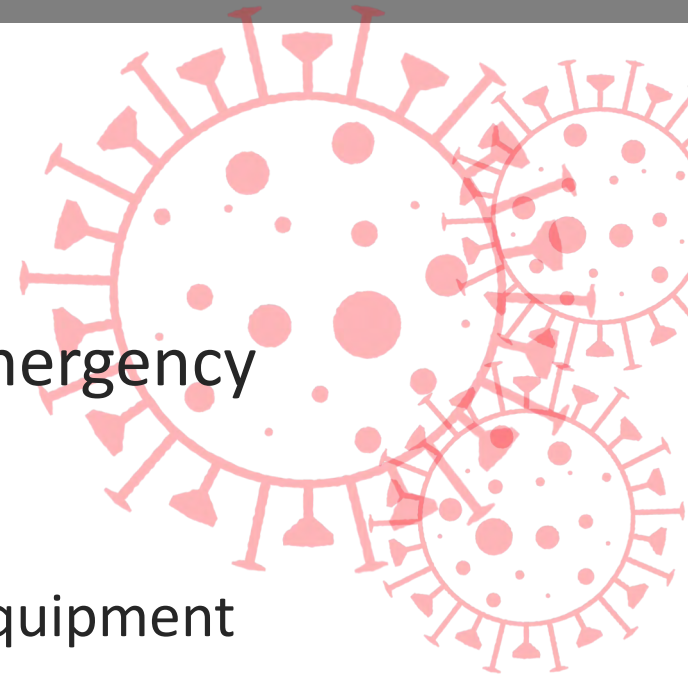


FIRE



Disasters Strike

1. Couldn't respond quickly to the emergency
 - Couldn't find shut off valve
 - Turned off the wrong power source
 - Couldn't find the O&M manual to fix equipment
 - Accidentally hit an underground pipe/wire
2. Documents themselves were damaged/at risk
 - Tornados, flash floods, fires, burst water pipes, rodents
 - Irreplaceable paper documents should be digitized



Retirement/Management Change

50% of facilities management personnel will be retiring in the next 8 years!!!



New staff cannot function with chaotic file rooms and do not want to handle paper

Fast, easy access to information allows new staff to do their job

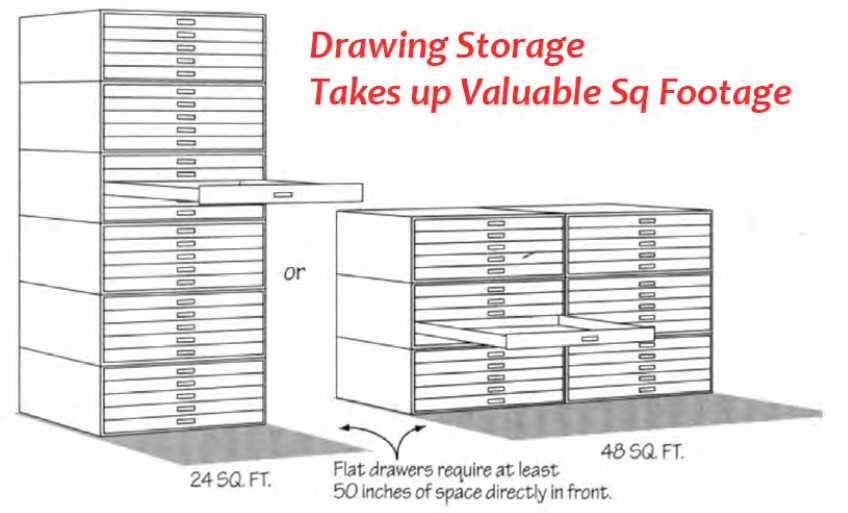
Renovation/Moving

Need the space for other reasons

Building is being renovated

Downsizing

Good time to organize and digitize



DOCUMENT MANAGEMENT SYSTEMS

- Improve emergency preparedness AND building operations
- Save time, space, and money
- Increase productivity
- Reduce risks
- Improve project budgets
- Improve customer relations
- Cloud-Based

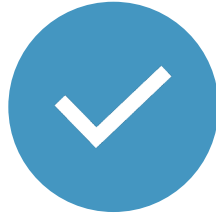
USER-FRIENDLY!!!!



CLOUD-BASED DMS EXPECTATIONS



MOBILE ACCESS FROM
ANYWHERE,
ANYTIME, ANY DEVICE



LOGICAL INDEXING
CRITERIA



SEARCH CAPABILITIES



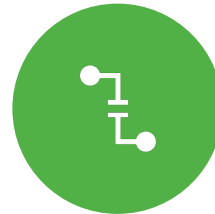
EASY
COLLABORATION/
SHARING



IMPROVED SECURITY



DOCUMENT
PROTECTION FROM
DISASTERS



CONTINUITY DURING
STAFF TURN-OVER



IMPROVED AGENCY
REVIEWS/AUDITS

BENEFITS OF A CLOUD-BASED DMS

- Quick searches for information
 - Think “Google” type searches
- Cloud Access to Information
 - Anywhere, Anytime, Any Device
- Minimize Risk
 - Quick response to emergency situations
- Integration with other Software Programs



- Construction
 - Construction Management Software
- Facilities Maintenance
 - Work Order Systems
 - Building Automation Systems
 - Document Management



**There is not one system that
does everything well.**

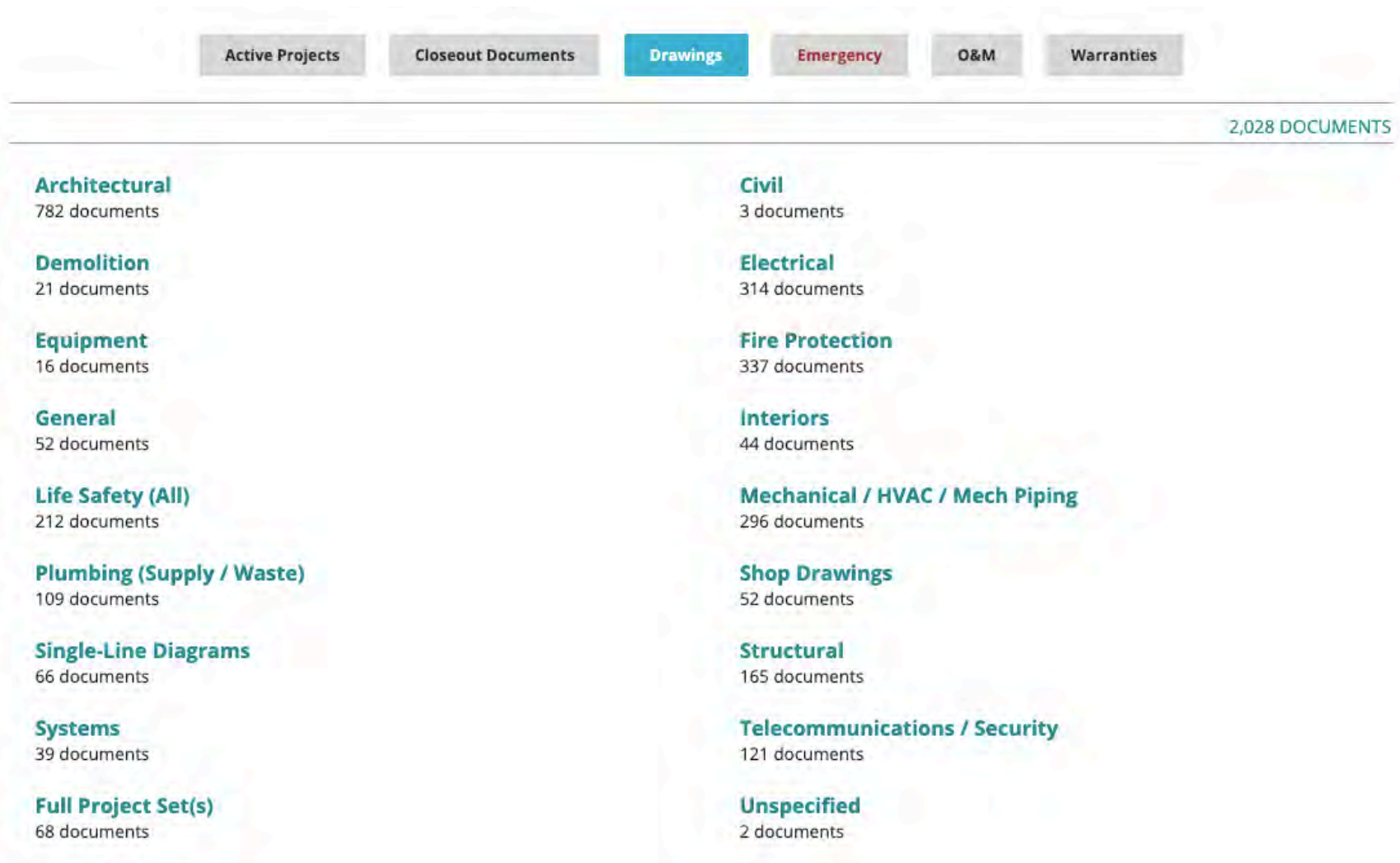


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DOCUMENTS AT YOUR FINGERTIPS

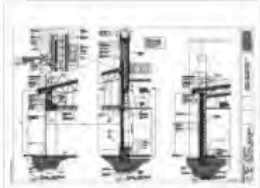


SIMPLE SEARCHES

 [911 Drawings](#) [Current Life Safety](#) [Dashboard^{New}](#) [Library ▾](#) [Other ▾](#) [Help ▾](#) 

 **Library Search Results**
6 matches | 5 Archived matches

[Email 8 Selected Files](#)  [Actions](#) [Sort by](#)



☐ Life Safety - 4th Floor
12/1/2018 ▾



☐ Hallway and Elevator Shaft Sections
12/1/2017  4 ▾



☐ Square Footage Layout - First Floor
2/10/2016 ▾



☐ Floor Plan - First Floor
1/1/2014  3 ▾



☐ Elevator Sections and Details (Stamped) - HAS VERS...
7/15/2002 ▾



☐ Demolition Floor Plan - Plumbing - Existing Water ...
8/1/2000 ▾



34 documents online

DOCUMENT SEARCH OPTIONS

Classification Facility Drawings (34) ▾

Title/Keywords 

Document Date yyyy or m/d/yyyy - yyyy or m/d/yyyy

Building Bayside Emergency ▾

Discipline Architectural ▾

Include Published Files ▾

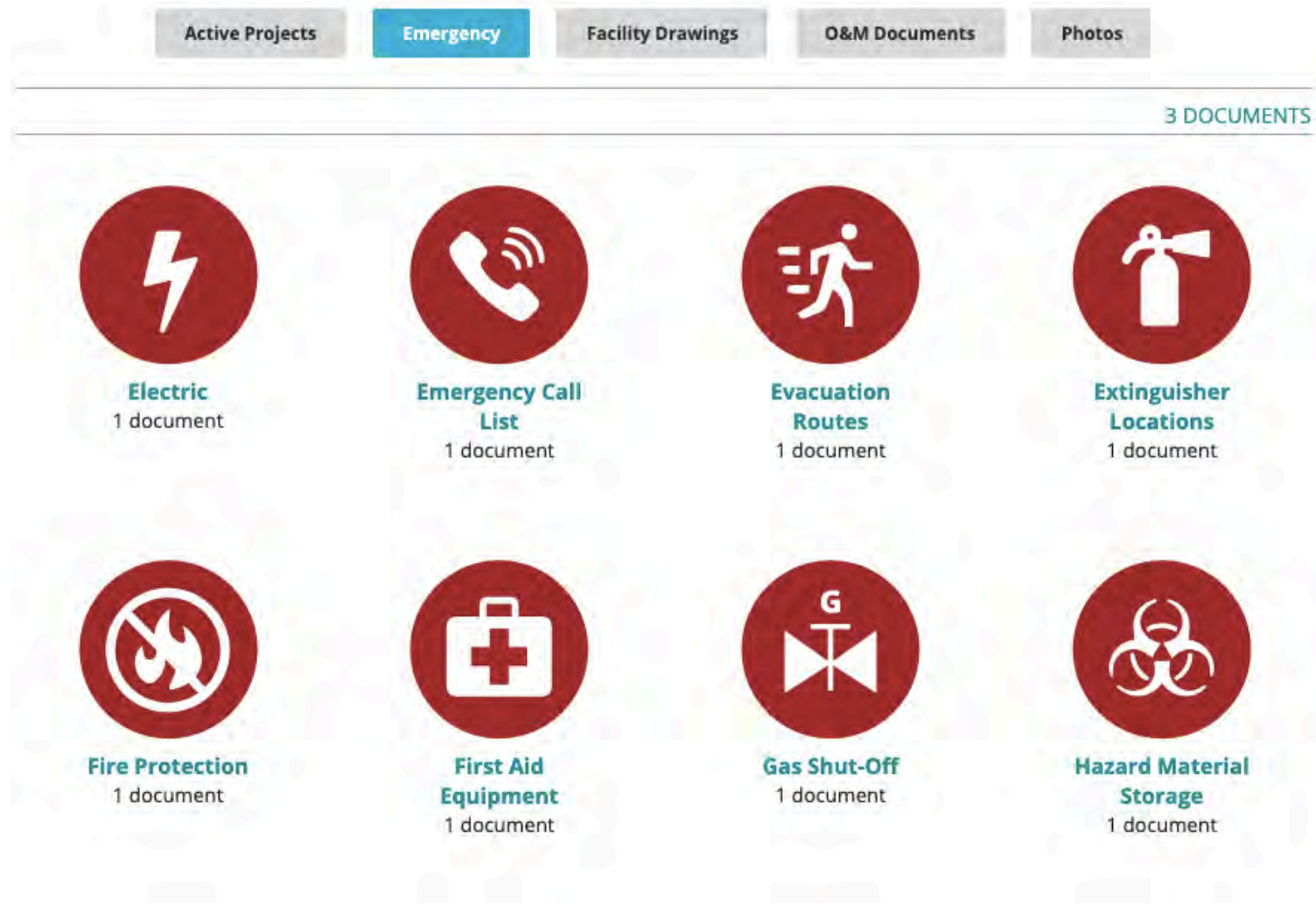
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IFMA Webinar Series

SHORT CUT TO EMERGENCY DOCUMENTS



EC 02.03.05 | Fire Safety Equipment-Extinguishers, Pull Stations, Strobes

Elements of Performance	Location	Frequency	Next Due	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV
EP1 Inspect Extinguishers	Bayside	90 (+/- 15 days)	5/26/2020		✓			☁						
EP1 Inspect Extinguishers	East Wing	90 (+/- 15 days)	3/21/2020			☁								
EP1 Strobe Test	East Wing	90 (+/- 15 days)	3/14/2020			☁								
EP1 Strobe Test	Bayside	90 (+/- 15 days)	4/17/2020	✓			☁							
EP3 Duct, Heat, Smoke Detectors, Pull Boxes, Elect. Releasing Devices	Bayside	90 (+/- 15 days)	4/28/2020	✓			☁							
EP3 Duct, Heat, Smoke Detectors, Pull Boxes, Elect. Releasing Devices	West Wing	90 (+/- 15 days)	4/16/2020	✓			☁							
EP3 Notification Devices (Audible and Visual)	Bayside	365 (+/- 30 days)	9/17/2020									☁		
EP9 Sprinkler System Main Drain Tests	Bayside	365 (+/- 30 days)	5/28/2020					☁						
EP11 Fire Pump(s) Test Overview	Bayside	180 (+/- 30 days)	3/7/2020			☁								
EP12 Standpipe Systems Tested with Water Flow	Bayside	1825 (+/- 30 days)	10/14/2023											
EP18 Smoke and Fire Dampers tested one year after install, then every 6 years	Bayside	2190 (+/- 30 days)	9/14/2022											
EP18 Smoke and Fire Dampers tested one year after install, then every 6 years	West Wing	2190 (+/- 30 days)	10/11/2022											
EP19 Smoke Detection Shutdown devices for Air-Handling Equipment Tested	Bayside	365 (+/- 30 days)	5/15/2020					☁						
EP25 All Sliding and Rolling Fire Doors tested for proper operation and full disclosure	Bayside	365 (+/- 30 days)	4/9/2020				☁							

- 28% of businesses achieve full ROI in less than 6 months
- 59% of businesses achieve full ROI in less than 1 year
- 84% of businesses achieve full ROI in less than 18 months



- 20% increase in productivity
 - New staff can find information quickly
- Reduction in square footage for paper storage
- Risk Reduction
 - Information not lost in case of flood, fire, theft, mold
 - Documents are accessible during an emergency event
- Fewer change orders for construction projects
- Contractors charge less when documents are readily available

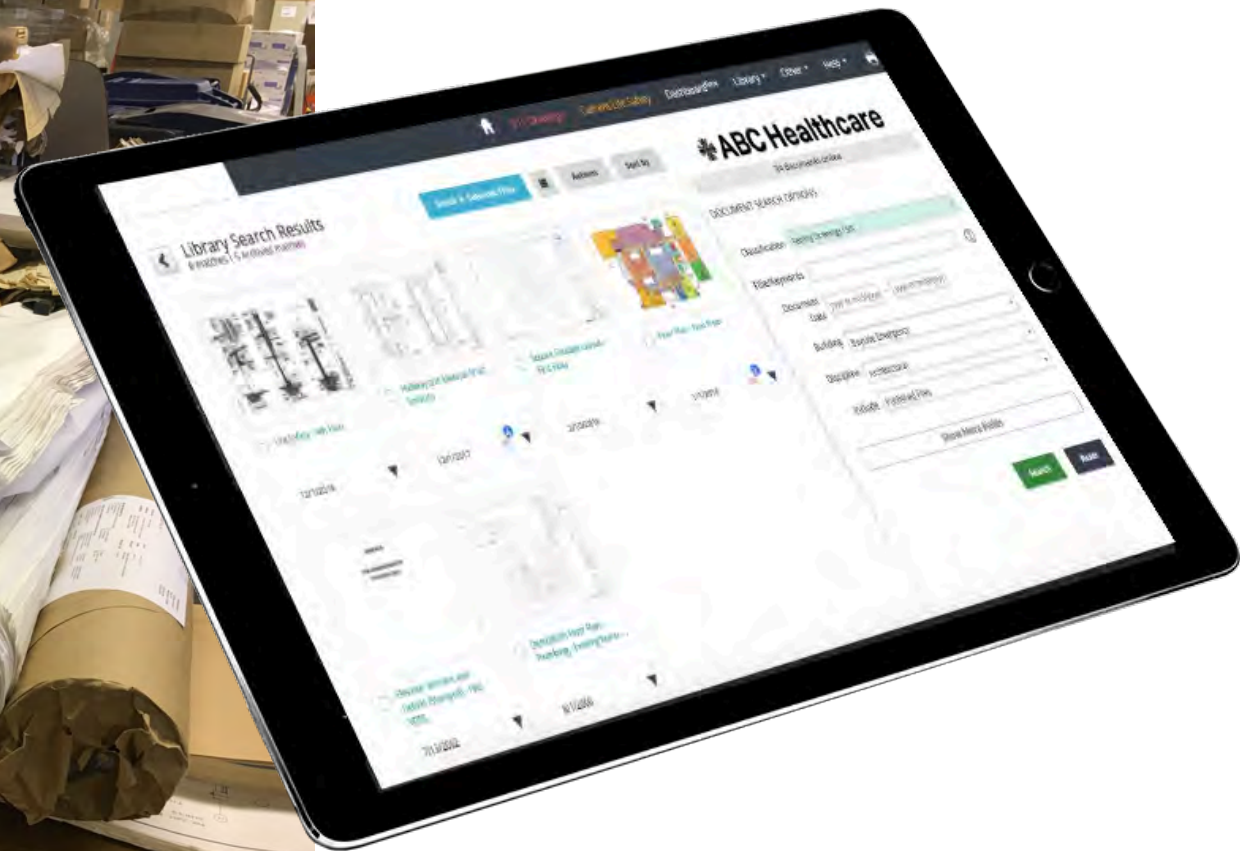
■ Non-financial Benefits

- Meeting regulatory compliance needs
- Improved communication/collaboration
- No longer reinventing the wheel
- Increased security
- Better customer service
- Fewer errors
- Happier employees

How do I go from this:



To this:



Identify:

■ Budget

- Allocate funding and use it

■ Priorities

- Prioritize most important documents first
- Drawings (As-BUILTs, Permit Sets, Original Construction)

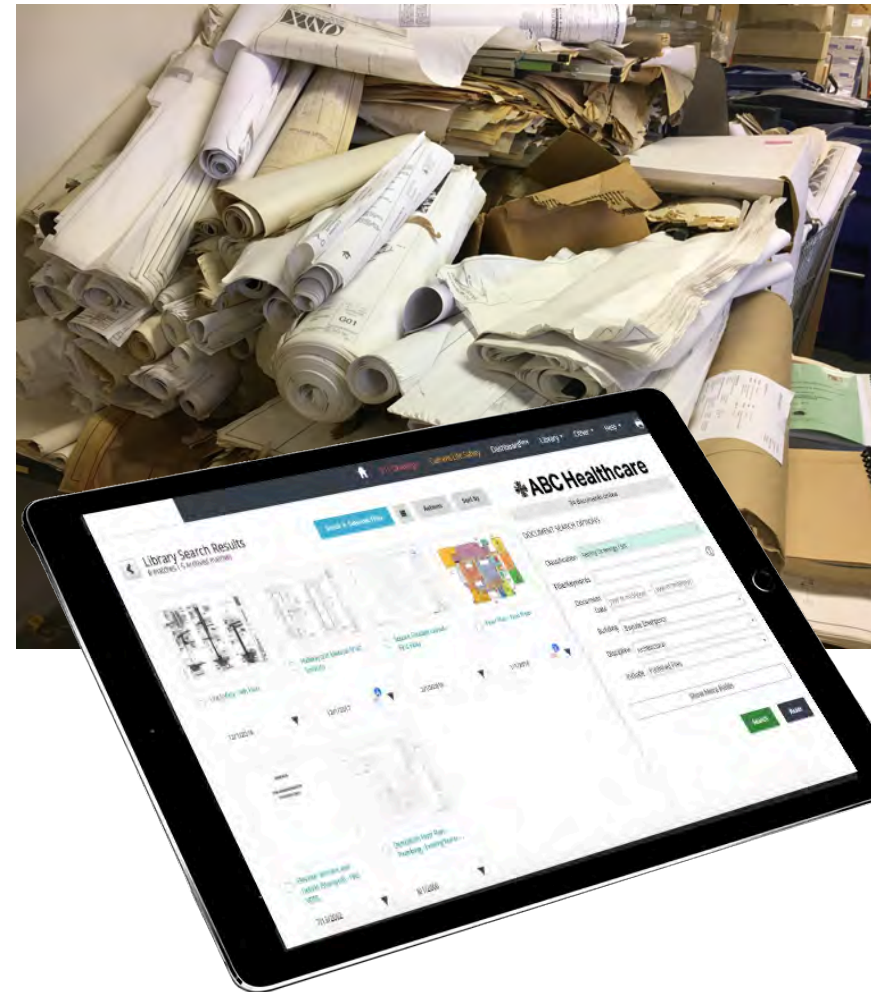
■ Document Management System

- Bring already digitized documents in first
- Figure out structure and metadata

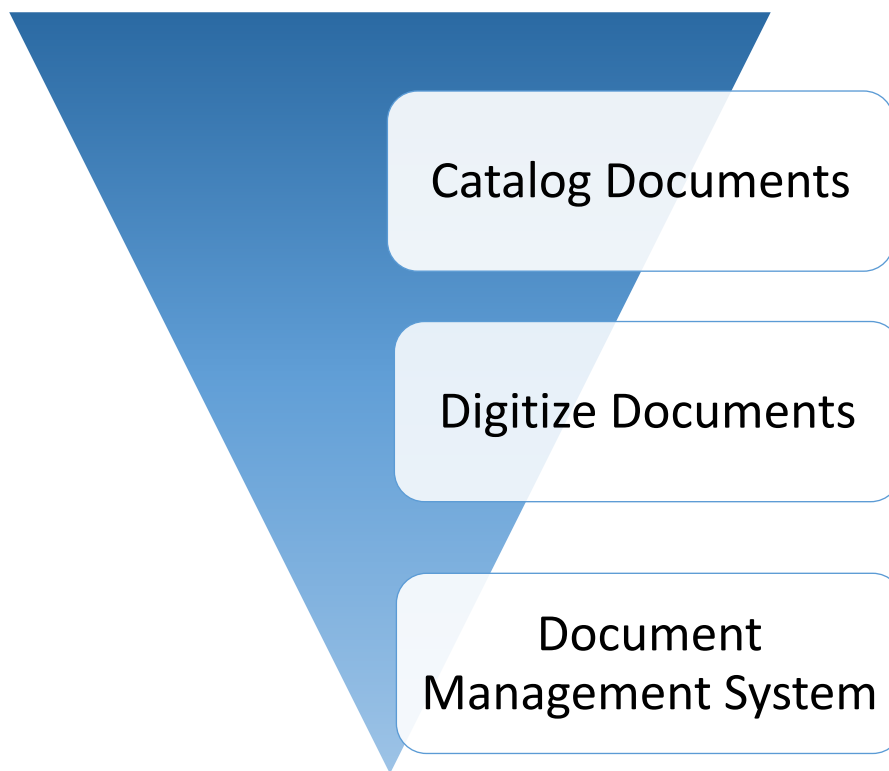


When to Hire a Professional/Contractor

- No time to do it yourself
- Task seems overwhelming
- Want a turn-key solution
- Hire people who understand:
 - Subject matter
 - DMS
 - Scanning/Indexing



3 Steps



1. Most labor-intensive part of the project, but most important step. Remember: Junk In, Junk Out
2. Scanning and Indexing- PDF, OCR, 300 DPI. Capture enough information so that users can search in a variety of ways.
3. Choose a user-friendly document management system. There are many different options to meet every budget.

Cataloging

- Figuring out what exists (paper and electronic)
 - Look in closets, offices, desk drawers, server, thumb drives, CDs, basement, penthouse, etc
- Separate out the duplicates
- Identify latest versions of documents
 - If you have an As-Built Set, why pay to scan a 90% submission set?
 - If you already have a digital version, why scan a paper copy?

This step reduces scanning costs by up to 50%

Scanning/ Indexing

- Scan at a high enough resolution to be able to zoom in and have the documents be readable, but don't make file sizes too big.
 - 300 DPI is a good resolution for both drawings and small-format documents
 - OCR for small-format
 - PDF
- Indexing- capturing metadata
 - Building Name, Project Name, Date, Issue, Discipline, Drawing Number, Drawing Title, Contractor, Floor
 - How will you be searching for documents?

Document Management System

- Many kinds of systems to meet many kinds of budgets
 - Excel Spreadsheets
 - Dropbox/ ShareFile
 - SharePoint
 - Full DMS with workflow, file sharing tools, etc
- Begin project with final destination in mind
 - Digitize and Index to meet DMS requirements
 - Easy upload into new system

Plan for the Future!!!!

- Library Management
 - Who will maintain the library
 - ✓ In-House or Consultant
- Retention Policies
 - How long to keep documents?
- Clear language in future construction projects
 - How should close-out documents be returned?



Good document management practices will:

- Save time, space, money
- Improve access to information during an emergency
- Improve communication between colleagues and contractors
- Allow for easier staff turn-over



QUESTIONS?



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Questions??

THANK YOU.



This presentation on **Facilities Document Management in COVID Times – Transitioning to a Cloud-Based System** can be applied to:

IFMA CFM Maintenance Activities

1 hour attendance of the CEU can contribute toward
Category 1 – FM Related Education
self report points and activities on the IFMA website
under the CAMP Portal
www.ifma.org

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Thank you to the Presenter for sharing their expertise!

Thank you to the webinar Sponsors for their support!

For additional information about the Chesapeake Chapter please visit:

www.ifmachesapeake.org

Join us in **March and April:**

- Participate with the SME Panel to discuss Indoor Air Quality in the Time of COVID
- Bring your Best Practice Ideas and join the conversation

Thank you for attending!

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