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Go Beyond Project Management's Logs To Modify or Create What You Need

by: Matt Weaver, MCP • Meyer Najem Construction, LLC

Project Management comes with several logs already set up (Documents, Custom Logs). These include: Punch Lists, Communications Log, Notices to Comply, Safety Notices, and Photo Log. You can modify these logs, if needed. You can also create a custom log to manage project information that is not tracked in other PJ documents.

The maximum number of columns on a custom log is 63. You can choose from several formats for each column: Text, Number, Check Box, Date, Time, List, Phone Number, Spec Section, Contact, Urgency, Commitment, Equipment, Extra, Cost Code, and Category. Job Cost must be installed to use Commitment, Extra, Cost Code, or Category column formats. The Equipment module must be installed to use the Equipment column format. Note that if you use extras, the location of the Cost Code column to the Extra column affects which cost codes appear. If the Cost Code column is directly to the right of the Extra column and an extra is selected during data entry, only the cost codes associated with the extra appear. If the Cost Code column is not directly to the right of the Extra column, only those cost codes not associated with an extra appear.

You should plan your logs before you create them. Set up each column in the order you'll enter information into the finished log. You can reorganize the

columns in your custom logs. The Move function allows you to move columns to the left or the right so that they appear where you want them. You can find this feature in Setup, Custom Logs, Change Columns. The new columns are available to select under the Column definition area in the Format list.

After you create a custom log, you can enter information in the log by selecting Documents, Custom Logs, Your log. To create a new entry in a log, click New and enter information in the first column of the new row. Press the Tab or Enter key to move through the grid. You can change information in a cell by deleting it and entering new information. You can delete an entire entry by selecting the row and pressing Delete on your keyboard. The Hide or Show feature allows you to display or conceal any or all columns in the log.

You can add internal notes or files to a new or existing log entry. The log will print as it is displayed in the window. If the combined sizes of the columns exceed 320 characters in width, this is more than the maximum width of the report that prints from the Documents, Custom Logs task. To print more than

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The Hottest Thing for Your Phone? Process Mapping

by: Tom Gebes, President • BuilderMT

Over the past 10 years or so, the construction market has changed from data entry, reporting and decision making all done in a company's headquarters to the performance of these functions at the work site by field staff. Why this shift? Contractors have wised up; they know it just makes sense to capture data where it originates. Superintendents and project managers are entrusted with thousands, if not millions, of dollars of company assets, a.k.a. construction projects, and we need to provide these staff with the tools for success.

With this shift away from the company's home office controlling data comes a question. "What technology best enables the most efficient manipulation of that data in the field?" You can see the answer just by turning on the TV or reading a magazine: mobile phones with Internet connectivity. Today, even moderately priced cell phones can use "phone apps" to do everything from time-stamping time cards and GPS tagging your subs, to variance purchase orders on the fly and even authorization to pay upon checklist walkthroughs.

Not only does improved connectivity between the field and the home office empower the field managers, it also dramatically improves overall productivity. No one wastes time driving to and from the home office, and that alone makes managers more efficient as they move from job site to job site.

And, oh yes, this technology is a very green thing to do. Consider the paper-free aspects of a digital manage-

ment system, but also the reduced use of fuel and, more importantly, the cycle-time reduction when building homes or commercial projects. And that's to say nothing of the baseline office functions

"Contractors have wised up; they know it just makes sense to capture data where it originates."

that are now so much more efficient.

"To date, we have created and rolled out three forms for the field staff," commented Liz Schellenger, IT Project Manager of Darling Homes," as she related efficiencies the company has seen with improved mobile communications. "With many employees in the field, this brings the processes closer to them, and those processes can be approved within hours instead of days traveling back and forth to field and corporate/regional offices."

When construction companies purchase ERP (Enterprise Resource Planning) systems, those systems typically

handle 75% of what the construction firm requires for baseline operations, such as accounting and estimating. But that's never really been a cost center for contractors because the contractor can exercise such centralized control over those processes. It's the other 25% that kills. But that 25%—with improved process workflow internally and improved communication with the field—can dramatically increase the bottom line, even by double-digit percentage points.

Jeff Walsh, Systems Manager for Infinity Homes, Denver, CO, explained his use of workflow management software and process optimization this way: "The job site super's schedule change triggers a series of messages and e-mails to the appropriate people. We are able to focus on quality control and not on 'damage-control.'"

Adds Justin Meyers of Eastwood Homes, "Improved mobile communication allowed 80 staffers to eliminate two to three hours per week in manual duties, yielding 240 hours a week in savings. Multiply that out over a year, and it's 12,480 hours saved annually (312 work weeks or 6 full-time employees)."

Today, just as when a construction company researches its ERP back office accounting, project management, and estimating solutions, construction companies are finding they have to put as much focus on selecting the correct mobile technology, as well. There are numerous wireless products that



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perform one or two basic functions: time card entry, change order control, bidding, RFIs, etc. But these “off-the-shelf” functions are really built for a one-size-fits-all approach to mobilizing your data, and you need a system that accommodates the idiosyncrasies of your company. You don’t want to be trying to jam a “round” mobile app into a “square hole,” so to speak.

In the current market, construction companies using new and exciting technology tools are seeing a 5X return on investment, and that 5X return is realized in just days and weeks—not years after implementation. These technologies, which are basically workflow maps with extreme versatility and customizability, can design any type of web-based process workflow and then engineer that workflow to easily communicate with and support the field, engineers, architects, subs and owners. Internet access is possible no matter what type of device staff are using, from their kid’s AOL account to 3G-linked mobile phones loaded with very cool apps. The real advantage of these workflow mapping tools is that they can affordably design any process the way your company wants it designed and to connect to any back office software at a fraction of the cost of buying an array of individual mobile software products, let alone the cost of trying to connect them all to your back office.

BuilderMT introduced BPM—Business Process Management in conjunction with Symantec Corporation, and BPM is just such a process-mapping tool for the construction industry.

According to Philip Robichaud, Information Technology Manager for Morrison Homes, Calgary, Canada, “We took an entire process paperless with BPM, with the data exchanges among supers, back office and vendors now

Success or Failure with Outsourcing Depends On a Good Client-Provider Partnership

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to struggle with quality of service from time to time, just as your own business does. Keep in mind that you can help each other to improve which will ensure that the relationship remains strong.


The process of selecting an outsourcing provider is a difficult one and something that you should not take lightly. Sitting on the client and on the provider sides of the table, I’ve seen and worked with companies that have made very good and very bad choices. Ultimately, as a consumer, you’re looking for a provider that has the resources to manage and support your business, and has a long track record of success. You need the insight and the tools that will enable you to manage that provider and hold it accountable for what it does.

Over my 25-year career, I’ve worked with many IT companies, and each one had a unique methodology for managing its business and its customers while offering a range of resources and levels of services to meet individual

entirely electronic, with no re-entry of data, exactly the way we operate. In the cost savings and efficiency gains alone, this switch paid for the software in about a week’s time.”

As we all know, the marketplace remains tight and project budgets are under even more scrutiny. It is critical that construction firms consider the importance of improved field data collection, tracking and reporting. Companies should establish a list of functions they want to improve between the home office and the outside world. Today, your company’s “homework assignment” is to hold a roundtable meeting with your field and office staff and ask them questions such as, “If we could do anything to improve the way we operate as a

client needs. The continued evolution of Winning Technologies is based around a simple methodology of removing finger-pointing, providing our clients with a single liaison, taking control of the entire IT management process, controlling the quality of the product by controlling the process, and ensuring that our clients have full insight into how we perform for them. That’s what you’ll want your outsourcing professionals to do, too.

About the Author: Scott M. Lewis is President/CEO of the Winning Technology Group of Companies, the largest provider of IT services to the U.S. construction industry. Scott has designed and managed systems from five users up to 3,000 users. Over the years, Winning Technologies has evolved a unique business-based methodology to better manage technology and technology resources in order to increase productivity, increase profits, and has turned IT into a business unit rather than a cost of doing business. Scott is a member of CFMA, AGC, ABC, TUG and several other construction and technology professional organizations. 

construction company, what would it be?” Or ask, “What types of improved communication to our vendors, owners, project managers, municipalities, etc., would improve our efficiencies and lower the time needed to perform project management?”

You may be surprised at the feedback you get. Use this information to establish a wish list to select technology tools that will provide you with your own 5X ROI.

Tom Gebes is President of BuilderMT, a long-time technology development company and part of the Sage Development Partner Program. Tom can be reached at tom.gebes@buildermt.com or www.buildermt.com. 

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