

Controlling Digital Documents with Project Information Management (PIM) Software

By Bob Batcheler

Project information management (PIM) software is a new category of technology designed to tackle the growing challenge of managing electronic documents and digital workflow by architects, engineers and contractors.

Managing electronic documents and team communications, including project email, offers much more than simple efficiency in day-to-day operations. It also mitigates risks.

Searching for Information

One way PIM software reduces risk is by making project information, including information in email and attachments, easier to find, hence making it easier to resolve disputes. Industry-leading PIM software indexes all the text in over 200 file types common in AEC projects, permitting searches of a firm's project information in much the same way that major search engines browse the Internet.

This is a good example of how PIM software offers benefits not found in other document control technologies. For example, document management systems generally require you to move files into a database, forcing changes in work process. In traditional document management solutions, searching is only as good as the metadata you applied when filing the document, and project extranets do not help you search or manage internal project information at all.

Managing Shop Drawings, RFIs and Action Items

A particular firm offers a good example of how PIM software can be used to manage submittals, shop drawings, RFIs and action items. One person logs everything that comes into the office. She now uses the submittals management component of a PIM solution to make her job easier and give everyone in the office access to the status of all submittals.

For shop drawings, she sets due dates in the software. The technology automatically emails project directors with alerts about what has been received. If the shop drawings are not returned by their due dates, the PIM software automatically emails an alert to the project director. RFIs follow a similar workflow, ensuring timely responses to all outstanding requests.

Sharing Large Files

BIM files easily run 20 MB and up – too large to email. But leading PIM software includes information exchange capabilities that replace FTP sites. The PIM software is easier to set up and use, and is more secure. It also automatically maintains a complete audit log of who downloaded or uploaded what, and when they did it, which is all part

of good project information management. No special software is required on the receiving end.

Controlling Digital Construction Documents

PIM software also provides substantial benefits in issuing and tracking construction documents without forcing wholesale changes in internal work processes. Construction documents can be assembled, facilitating review of the coordinated set. When it comes time for the documents to be released, the set is easily published through the PIM software's unique information exchange feature.

The software notifies recipients that the published documents are available for download, and offers the option of emailing periodic reminders to team members who have not yet accessed the published documents. In addition to recording an audit trail of what was sent to whom, the software maintains record copies of complete sets of documents whenever they are issued.

Reducing Risk and Increasing Accountability

An effective PIM solution enables the design team to share information internally during the rapid, iterative process of design, and to publish it to external project team members, without changing the internal team's work process. These actions take place from within one software environment and function across all projects. Standardizing those processes reduces risk, and increases accountability and predictability of performance.

A structural engineer uses PIM software to manage the markup process, thus reducing the risks that changes would fail to make their way into construction documents and BIM files. ■

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