Improving design, responsiveness and collaboration with PIM technology

O2 Headquarters, Slough, UK

Architecture and design practice tp bennett had a list of requirements for a project information management solution. When IT managers evaluated Newforma Project Center, they found it ticked all the boxes.

tp bennett's IT Director Stephen Yates had been fielding requests from the practice's architects, designers and planners seeking a better way to manage their Outlook email. They wanted to file email with other project information, retrieve it with ease and maintain associations between emails and their attachments.

Stephen was confident Microsoft Outlook/ Exchange would not deliver a solution.

"We had been using Public Folders", Yates said, "but they don't work in the way we needed them to. Microsoft also indicated they were going to stop supporting them anyway."

Stephen had looked in vain for software that would help his colleagues manage their bursting inboxes. One solution was not robust enough. Another provided archiving but not much else.

Trevor Gale, tp bennett's director in charge of office procedures and compliance with ISO 9001, found a solution that stripped attachments from emails, "which sent shivers down the spines of our lawyers", Trevor said.

Then Stephen Yates found Newforma Project Center.

> "It finds information whether it's in an email, in an attachment to an email or in the notes on drawings."
>
> -Stephen Yates
> IT Director

Founded in 1921, tp bennett LLP is a leading architectural design practice working internationally for a wide spectrum of private and public sector clients with circa 150 employees. tp bennett has three core divisions of architecture, interiors and planning, supported by specialist practice areas in strategy, research and graphics. tp bennett has offices in London, Moscow, Abu Dhabi and New York.

Each tp bennett project begins with a design concept that's robust, legible and realistic enough to carry the commission from strategic design to completion without loss of power and relevance.

Challenges

Answers to questions lay buried in emails and other documents that were difficult to identify and retrieve
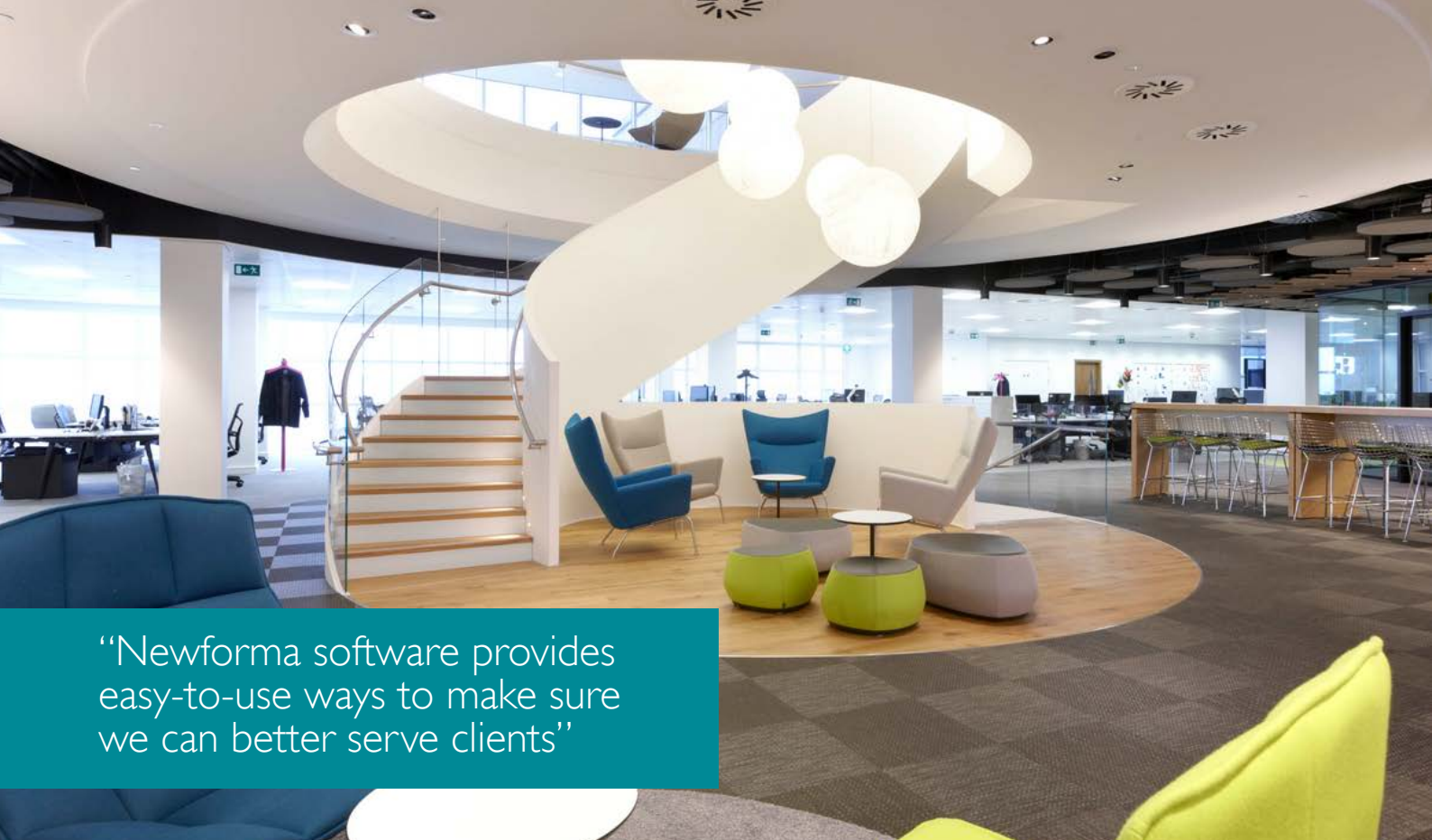
A client requested ready, ongoing access to project information

Results

Email is easy to file and find

Project-related email is available to everyone on the team

Google™-like search capabilities make it easy to find text information, whether in current projects or the archives

More time is available for design, quick responses to clients, and collaboration

> "Newforma software provides easy-to-use ways to make sure we can better serve clients"

Skype Office, London, UK
Shortlisted for the BCO London and South East Awards 2014

"It ticked all the boxes," Stephen said. "People could file email. They could find it again with ease. The software does not replicate already-filed emails. It recognizes attachments and ties them to the email they came with. It allows us to take the email out of one person's inbox and make it available to the rest of the team."

Email management was just the beginning

"We looked at Newforma Project Center to solve our oversized email problem", Stephen says, "but it was the information exchange part of the solution that drove our adoption."

Newforma Info Exchange is the solution's file transfer and collaboration component. It's a cross between FTP and a project extranet, but without the shortcomings of each.

"FTP sites are unauditable", Stephen says, "and project extranets don't integrate with internal processes, email chief among them. Because we limit email attachment sizes to 15 megabytes, email is not a good way to share large files. People might have to segment a large package of data into multiple packets and send multiple emails to get the whole package to a client."

Newforma Info Exchange permits two-way transfer of large files and maintains records of who downloaded what, when.

It allows managers to generate activity reports and set up automated email reminders to those that have not yet downloaded files. Users are also able to leave information on the Info Exchange server or schedule expiration dates, preventing bloat.

"Newforma allows us to do this in a very simple and transparent way", Stephen says.

"The timing was good", Stephen says. "Team leaders of one particular project came to me with a client request for project information to be held on the server. Newforma Info Exchange was perfectly suited to fulfil their request.

Search capabilities make it practical to mine archived data

Another vital Newforma Project Center capability is the search function, the equivalent of doing a Google™ search for project information.

"The Newforma Search capability is an application almost everyone uses in the course of a day", Stephen says. "It finds information whether it's in an email, in an attachment to an email or in the notes on drawings."

The Newforma search capabilities make it practical for Stephen to move archived projects from backup tape to servers, from which Newforma Project Center can index the data, making it searchable. (As part of a network upgrade, the tp bennett IT team is reassigning an old HP MSA1500 storage

area network to a new role as an archive server.)

"Questions arise all the time regarding completed projects", Stephen says. "The answers are in the archives, but the process of retrieving the relevant information was a laborious and manual slog."

"Because Newforma Project Center provides a simple way to search the full text of email and other project information, we now have a practical way to retrieve answers quickly", Stephen says.

Snapshot, Viewer, Markup, Action Items

Newforma Project Center helps tp bennett manage more than email and file transfers. The solution contains more than a dozen other functions for project information management, or PIM.

"We're seeing usage increase for Snapshot, which staff are using to capture images from their screens, as well as Markup, which is used to redline those captures and other files that they open in the Newforma Viewer", Stephen says. "Viewer is handy because it allows users to open files without having the underlying authoring software, whether it's AutoCAD or something else."

"To refer back to the Markup function," Stephen says, "our users like to email markup files directly from Newforma Project Center, saving them time switching to Outlook and attaching the file."

"You can find some of these individual features in other software," Stephen says, "but we like to have everything integrated. It just makes everything that much more productive."

For example, the Action Items activity centre integrates with Outlook email to give project managers a comprehensive way to record, delegate and resolve issues that arise during the course of a project. It has already been adopted by tp bennett team members working on a project for a government agency that requires activity audits. The Action Items activity centre generates reports in only a few clicks.

PIM software to support company values

tp bennett organizes its activities to free time for design, respond quickly to clients and build on the strengths of collaboration. Newforma Project Center software is one of the latest innovations to advance these pursuits.

"More and more in the UK, clients are getting more demanding", Stephen says. "Newforma software provides easy-to-use ways to make sure we can better serve clients without sacrificing design time."

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