



# These ARE the Documents You Are Looking For...

Jose Delgado – University of Southern California Glenn Seehausen – Hagerman & Company

## **Agenda**

- Introduction of Presenters
- History of Document Management/Archives at USC
- Original Challenges and Objectives
- Main Benefits
- Demonstration of Software
- Summary
- Questions and Answers



## **Introductions**

#### **University of Southern California**

- Jose Delgado Facilities Management Services
- 28 years experience
- Manages the Department that updates the Space Floorplans, GIS Maps, 3D Models and O&M Close-Out Documentation for all owned and occupied space

#### **Hagerman & Company**

- Glenn Seehausen Senior Technical Solutions Consultant
- 33 years of experience helping facilities organizations, with 22 years focusing primarily on University Facilities
- Consulted with more than a hundred University Facilities groups
- Glenn's unique approach to integrating document management/digital archives with the other technology systems and processes in Facilities has increased his customers efficiency and improved their key performance indicators (KPIs).

## **History of Doc Management/Archives**

#### **Business History**

- Management of Base Floor Plans
- Scanning and storing of paper archives
- Moved CAD files from Network to Doc Management
- Optimize Utilization
- On the go availability

#### **Software History**

- Through 1997 Rooms full of paper
- 1997-2004 AM-Workflow (Cyco)
- 2005 Present Meridian (Cyco, then BlueCielo, now Accruent)

## **Original Challenges**

- Moving from paper, with deliverables beginning to come in as digital files (DWG, PDF, RVT, DOC, etc.)
- Copies and outdated versions "floating around" on user's computers or on various network shares.
- SharePoint, Box, and other storage became just more versions floating around (similar to network shares).



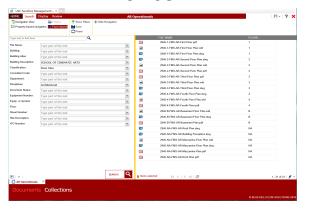




## The Solution

- Meridian A Central Repository allowing more staff/consumers to find, view, and print the right documents quickly, via:
  - Browsers on the desktop
  - Walk-up stations
  - Mobile

#### **Browser**



Walk-Up

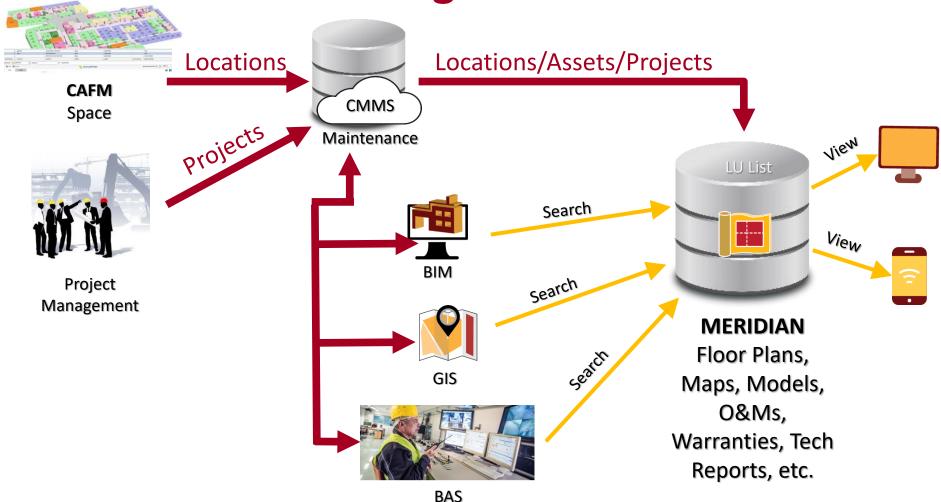


Mobile





## **Integrations**



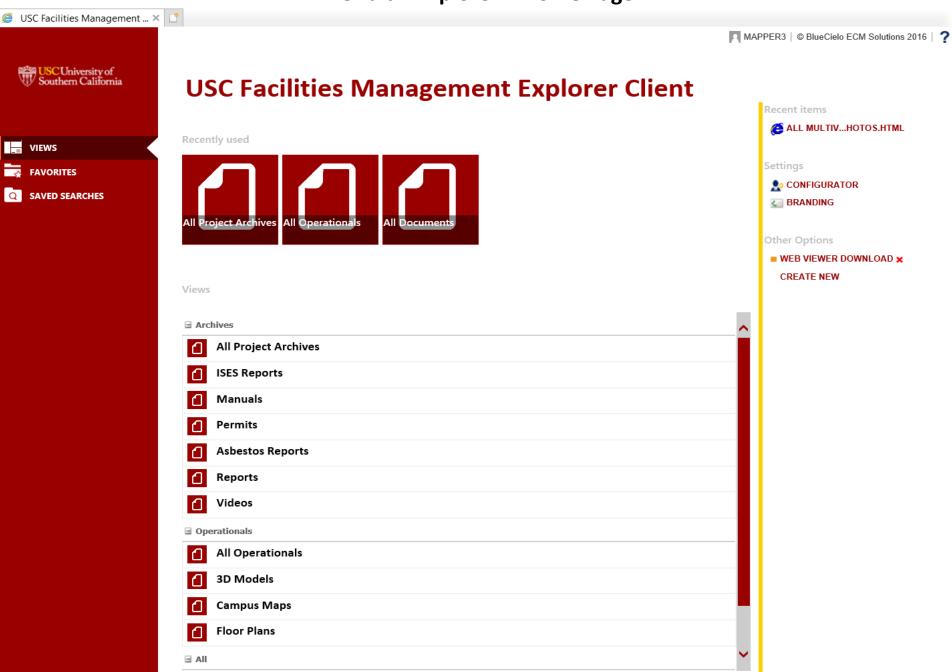
## **Benefits**

- Consumers of the documentation (i.e. front-line staff in **Operations & Maintenance, Facilities Managers, Public Safety,** Projects and Consultants), can find the documentation they need.
  - Accomplished via integration of the Maps, Models, Drawings and Asset **Documentation**
  - Mobile and at Desktops
- Instead of always finding documents for others, the CAD/Archives staff have time to do continual Meridian enhancements so that Consumers can find even more documents using better search data
- Version control a go-to place for the latest version with an auditable history (Floor Plans, Maps, Models, Project Archives)
- One consistent place to go for all documentation
- Secure and reliable People can see what they should and cannot see what they shouldn't. Security is easier to manage.

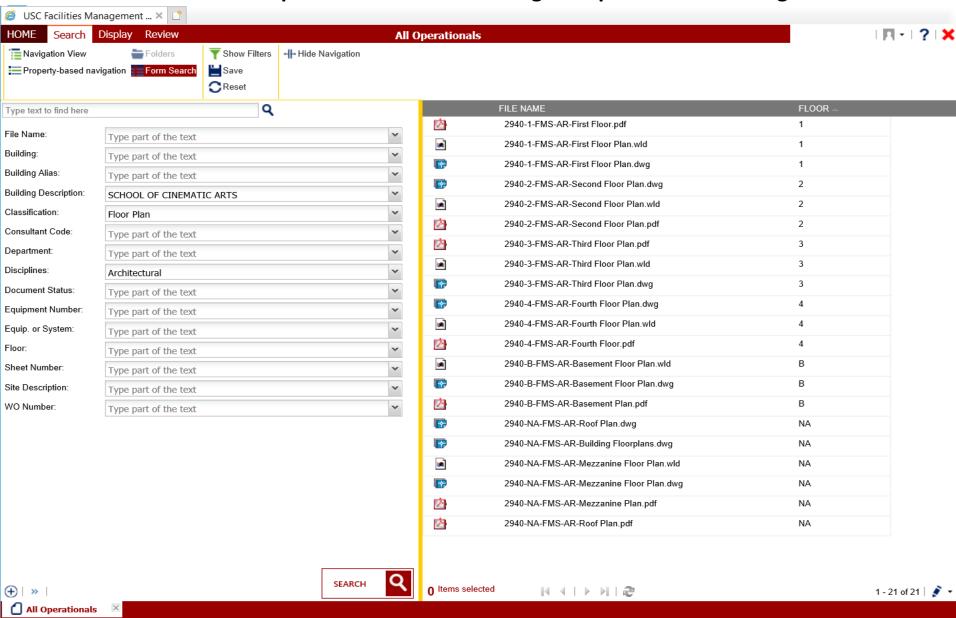


## **Software Demonstration**

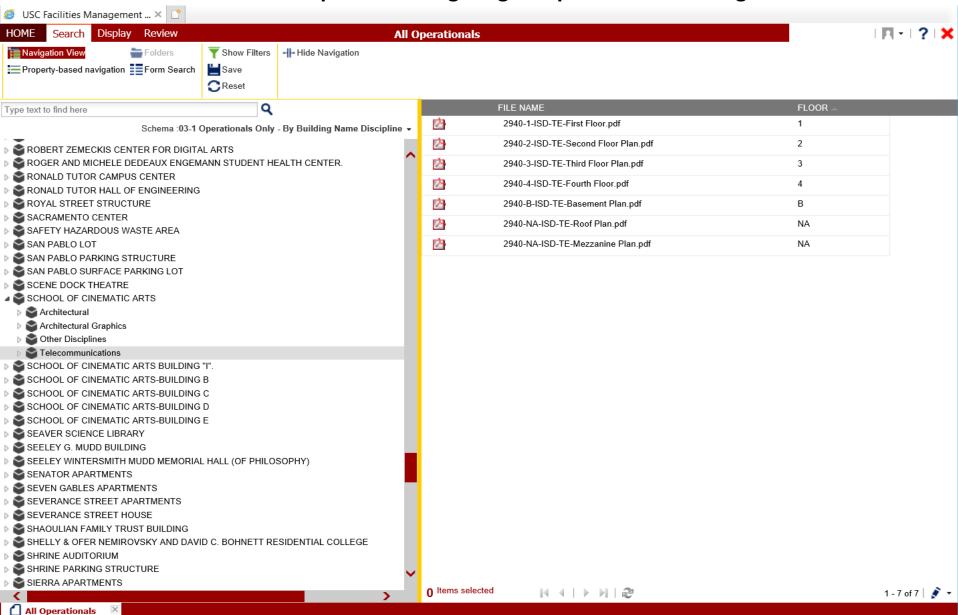
#### **Meridian Explorer – Home Page**



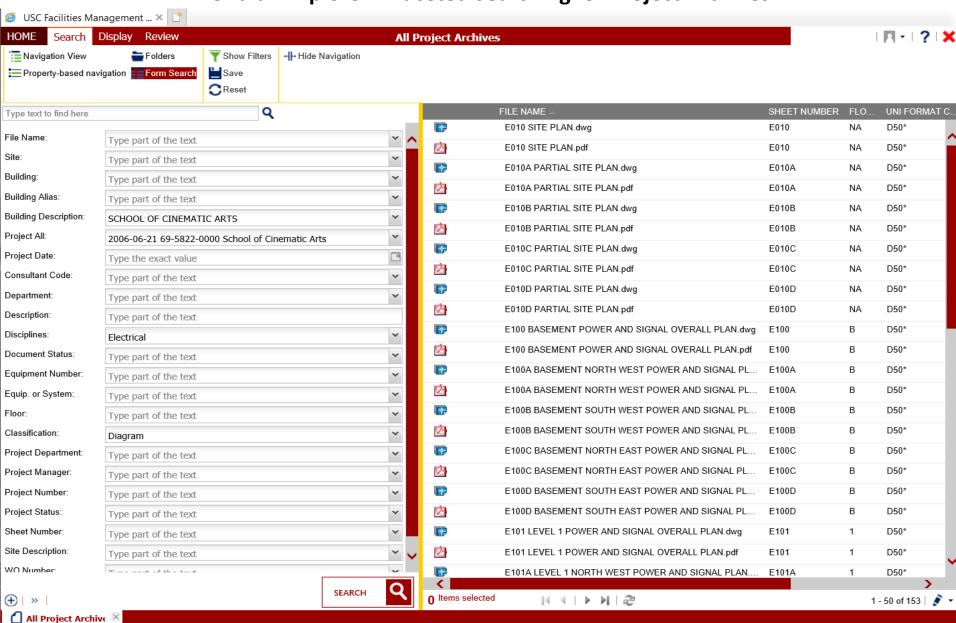
#### **Meridian Explorer – Faceted Searching for Operational Drawings**



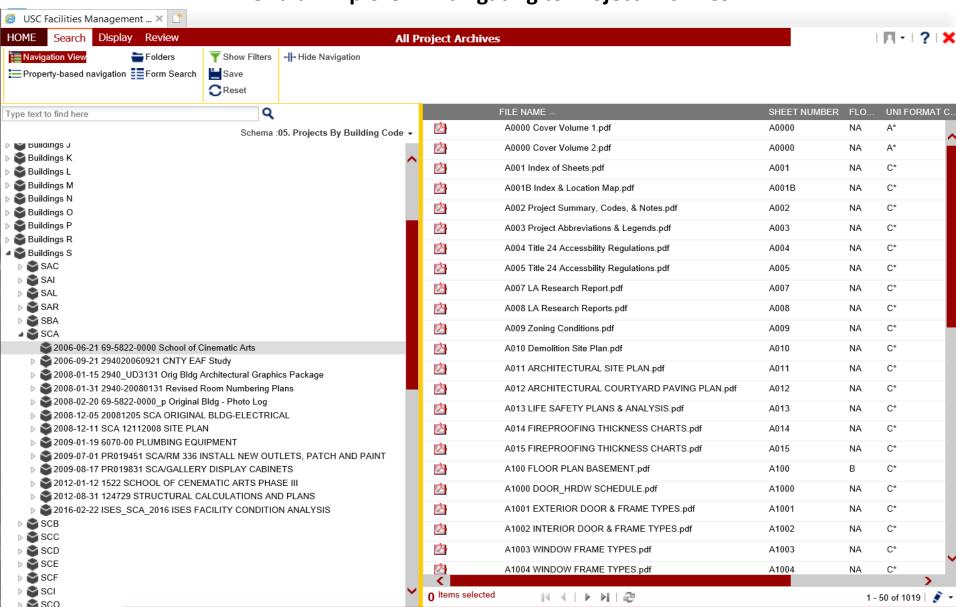
#### **Meridian Explorer – Navigating to Operational Drawings**



#### **Meridian Explorer – Faceted Searching for Project Archives**

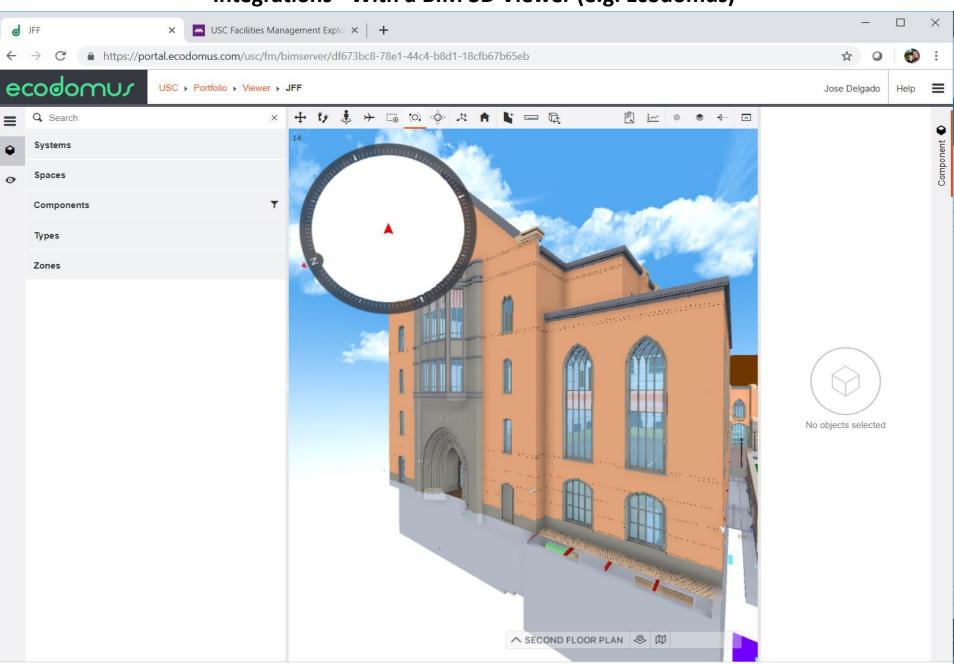


#### **Meridian Explorer – Navigating to Project Archives**



🚺 All Project Archive 🗵

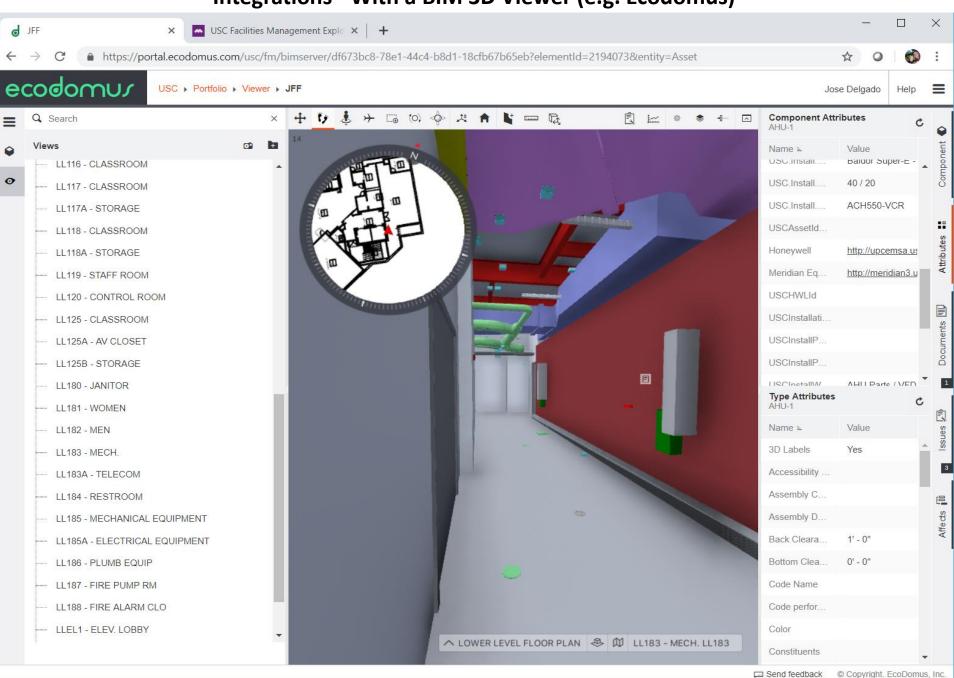
#### Integrations - With a BIM 3D Viewer (e.g. Ecodomus)



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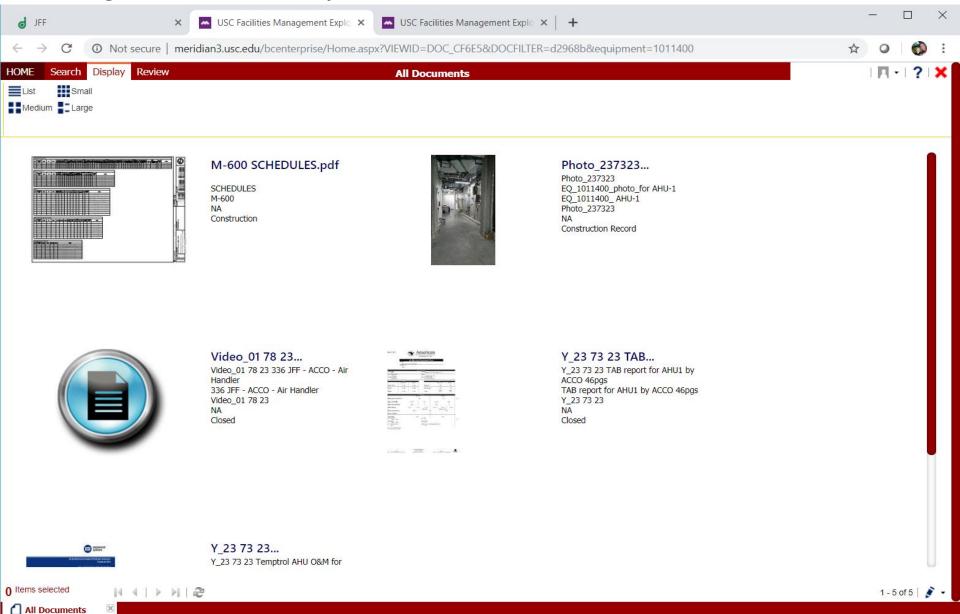
Send feedback

#### Integrations - With a BIM 3D Viewer (e.g. Ecodomus)



Send feedback

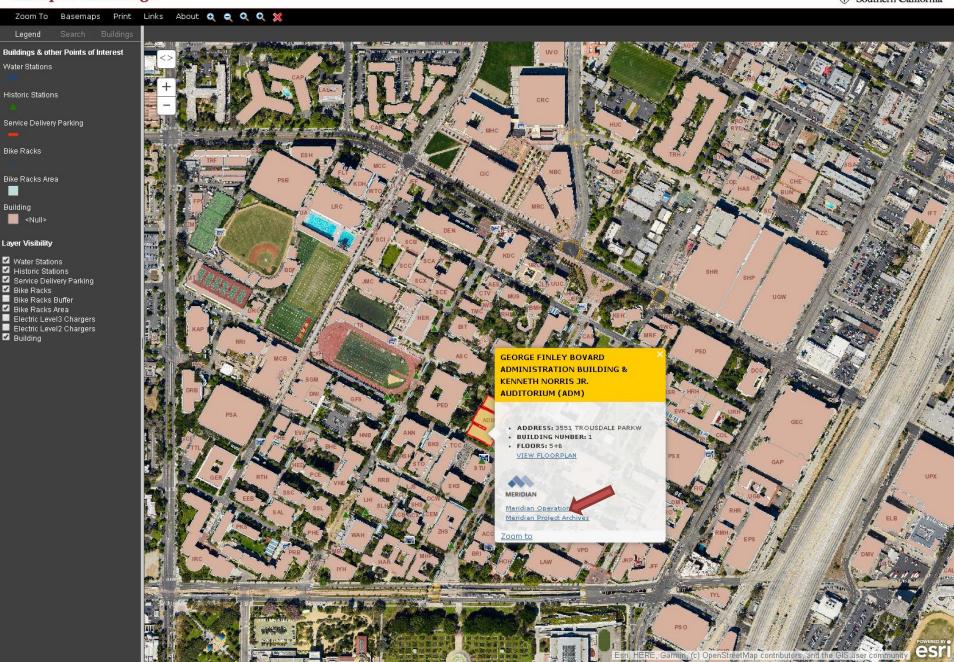
#### Integrations – Meridian Explorer launched from a BIM 3D Viewer to the Assets Docs



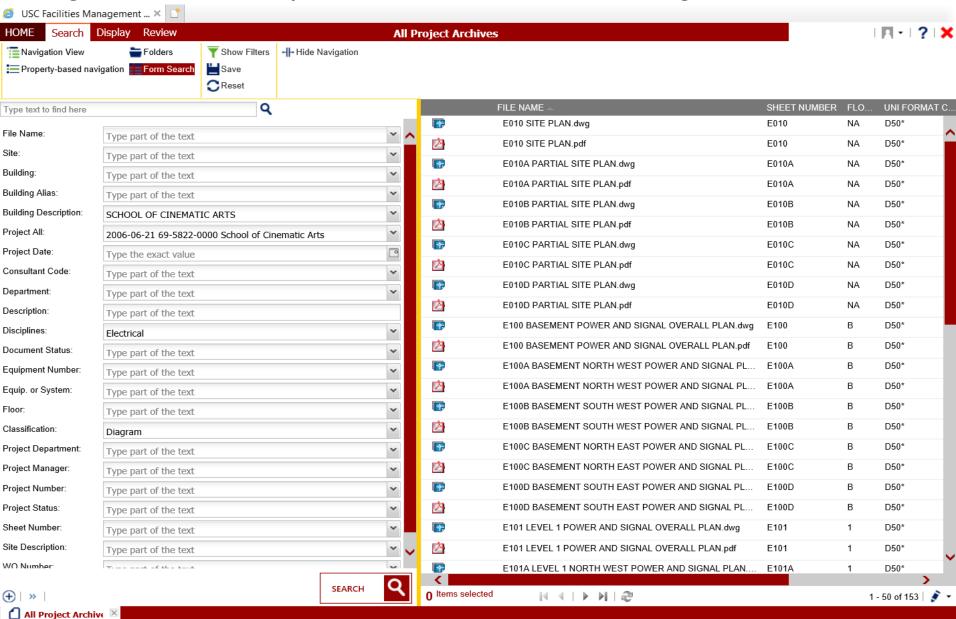
#### **Integrations – With GIS**

#### **Campus Buildings**

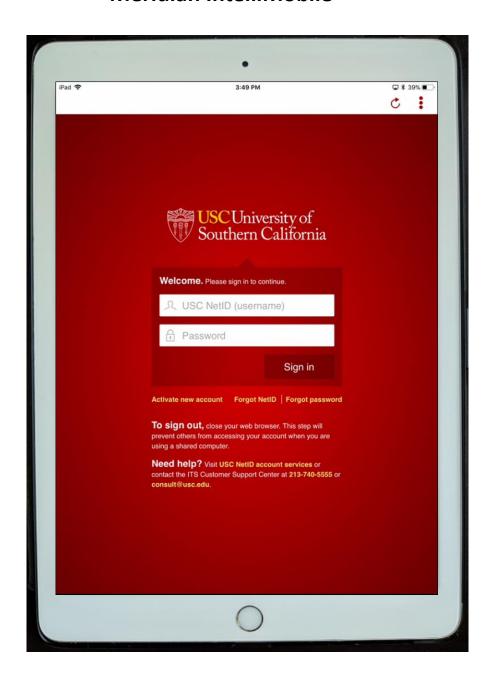




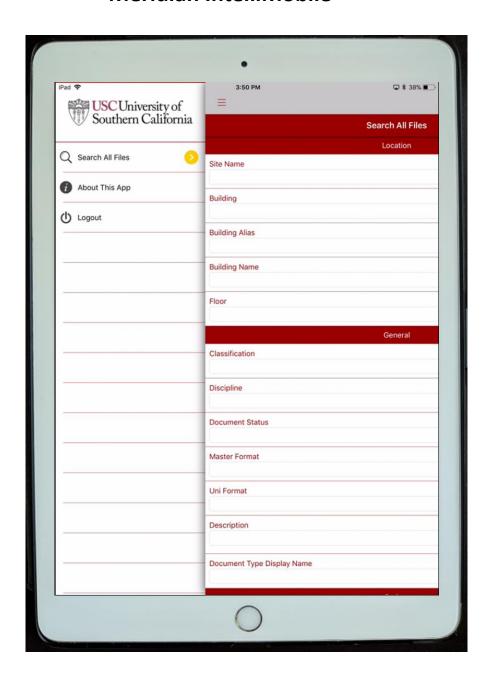
#### Integrations - Meridian Explorer launched from GIS to the Building Docs & Further Filtered



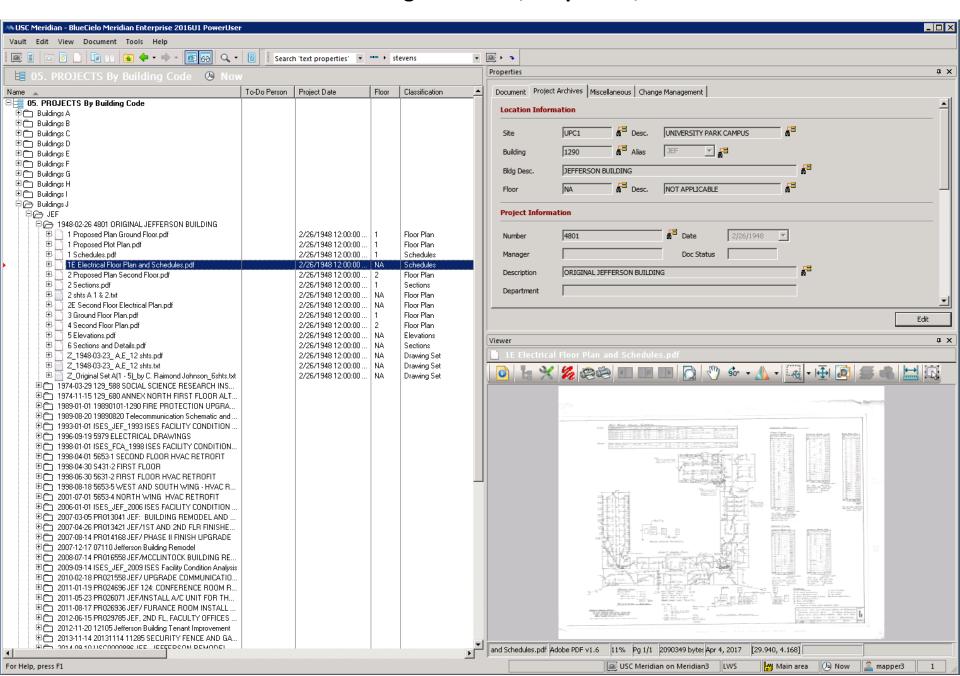
#### Meridian IntelliMobile



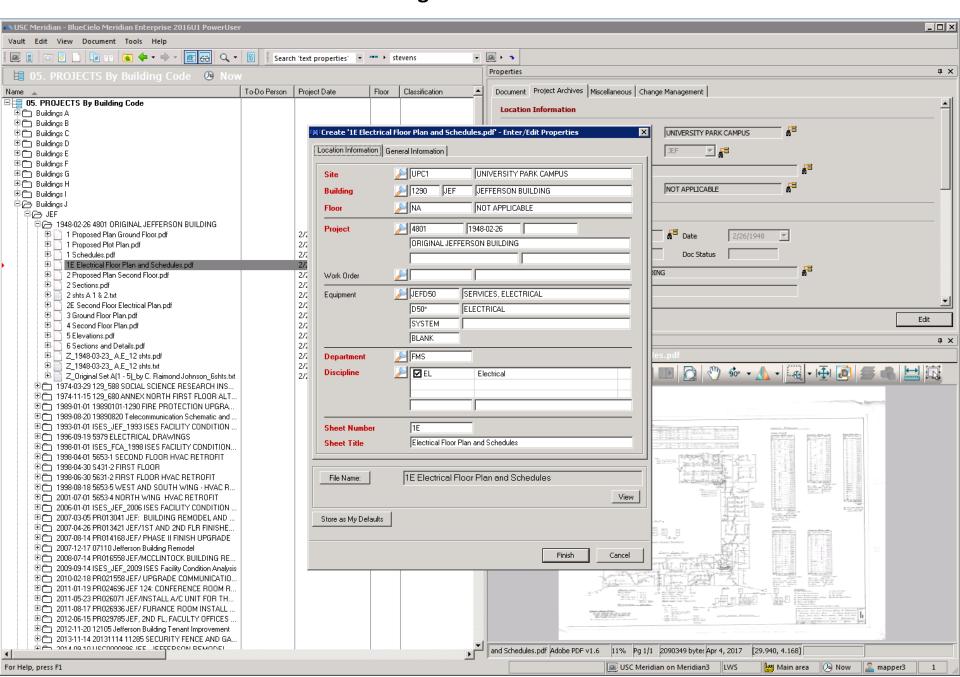
#### Meridian IntelliMobile



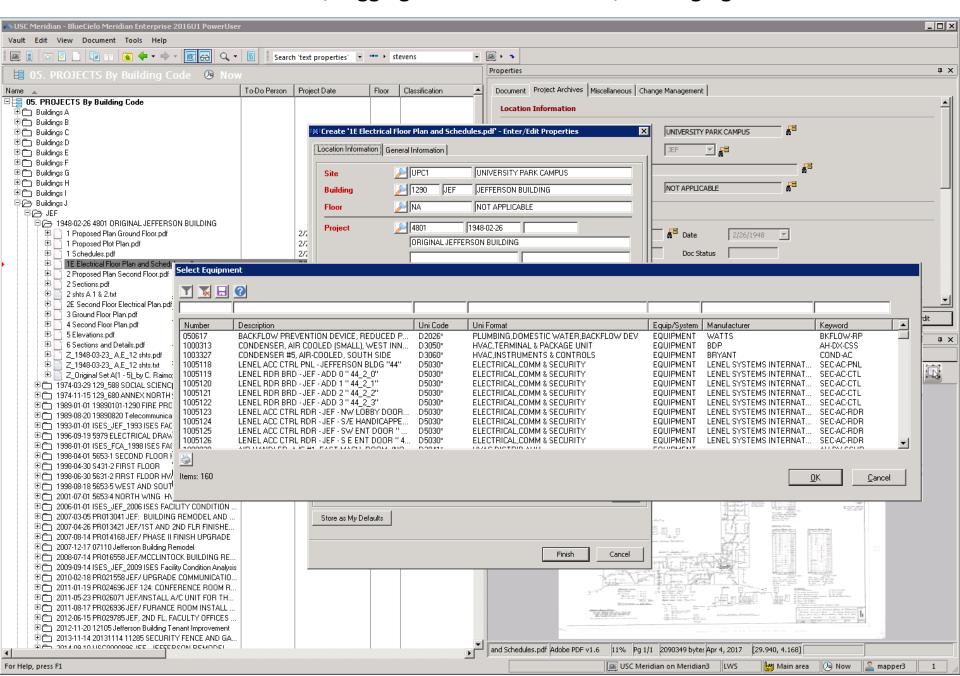
#### Power User - Navigation View, Properties, & Viewer



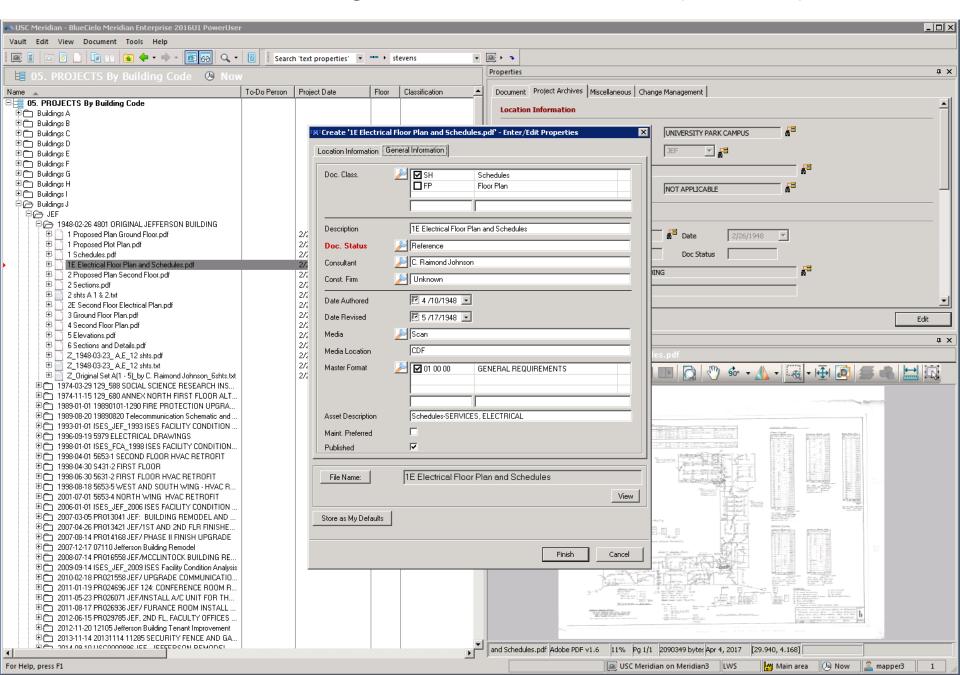
#### Power User - Adding Documents with IntelliWizards



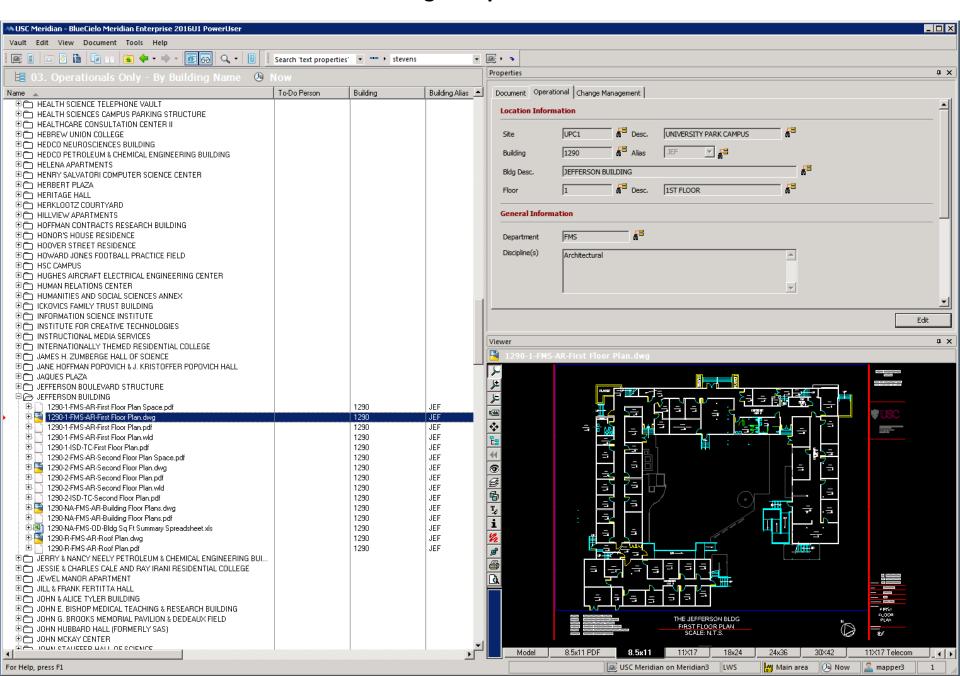
#### Power User - IntelliWizards, Tagging Document to Assets, Leveraging Data from CMMS



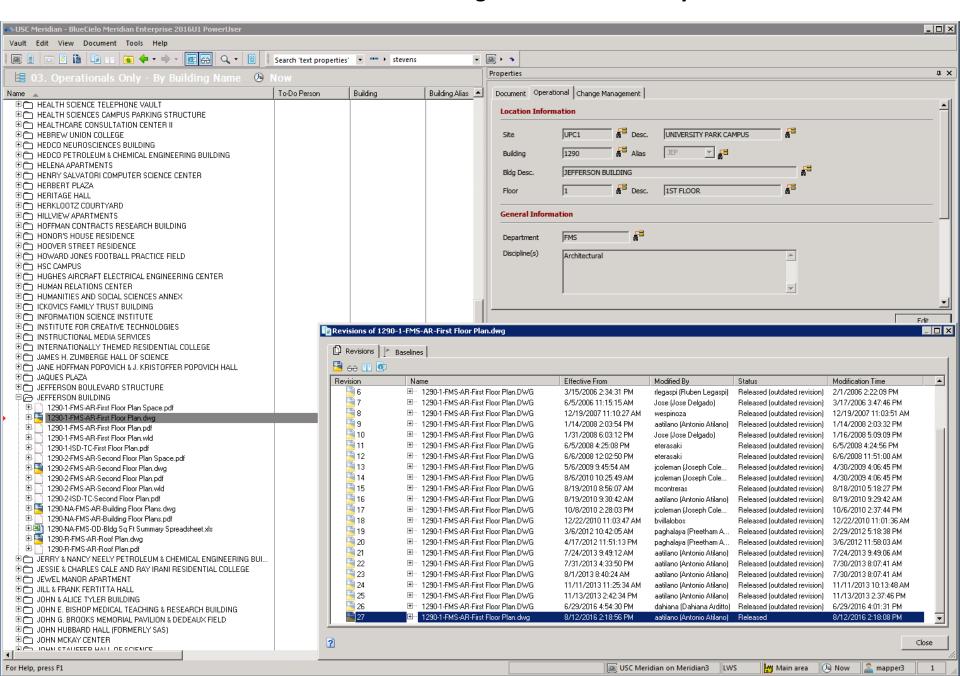
#### Power User - Adding Documents with IntelliWizards (Second Tab)



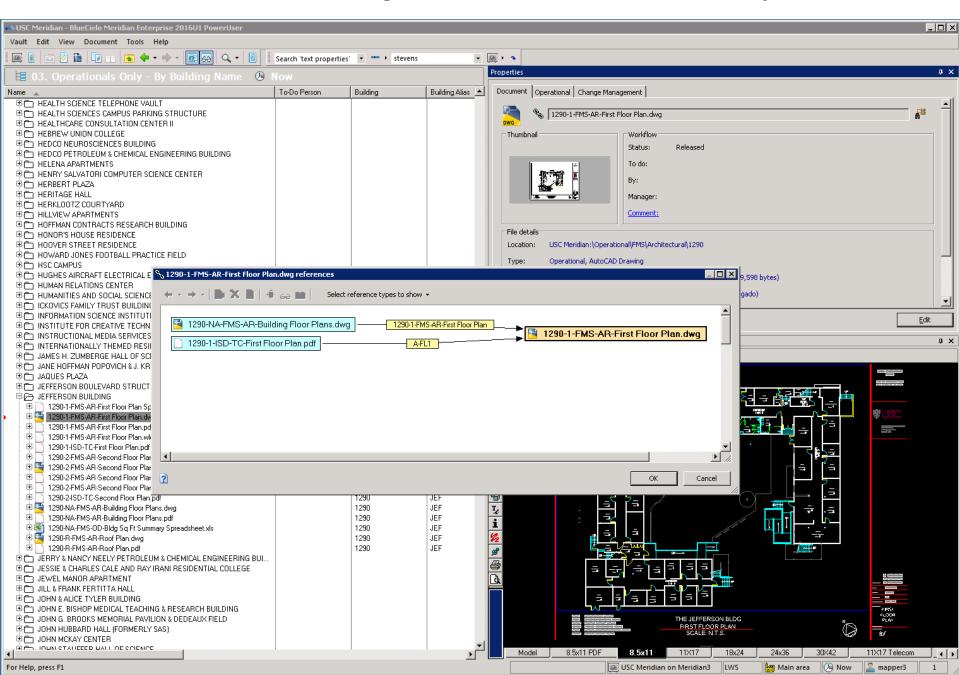
#### Power User - Viewing an Operational AutoCAD DWG

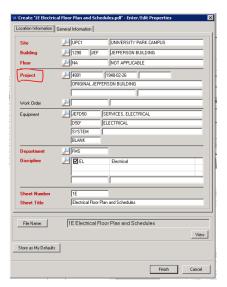


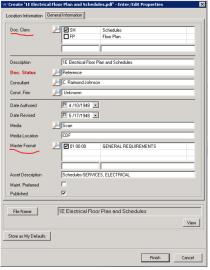
#### Power User - Viewing the Revision History



#### **Power User – Viewing the X-Refs and Other File Relationships**







## **Quality Metadata**



Use of Student Internships: Aligns with the mission of the University

Cannot find documents without defining good data and rulesbased data entry.



## **Summary of Achieved Results**

- Consumers saving time getting to the drawings and documents they need, from Desktops and Mobile
- Consumers can get the information they need without coming to the "CAD Services/Archiving Group"
- Consumers can get to the documents seamlessly from the other applications they use frequently (CMMS, GIS)
- **Document Management integration discussions revealed** opportunities for breaking down silos among the various groups and their systems (CMMS, CAFM, BAS, GIS).

## **Questions?**

## Want to find out more? Visit us at Booth 609

