

SUCCESS!

Industry	Engineering and Construction
Critical Issue	Difficulty finding documents resulting in lost revenue; inefficient litigation-related discovery causing increased risk.
Solution	Document management system with instant search and retrieval providing centralized control, versioning, and imaging to incorporate paper files.
Result	Increased control of job-related costs; time and efficiency savings in legal discovery processes from better control of information.

Using Document Locator to protect profit, reduce risk

Tocci Building Corporation actively seeks out cutting-edge tools and methodologies that will give it the competitive advantages needed to be a better provider to its clients. But like many building industry companies providing construction services, Tocci faced some common information challenges inherent in the complex building process. Among these were two issues of immediate concern: how to improve the control and management of job costs to recoup time and materials expenditures, and how to ease the complicated process of locating documents for legal discovery. At the core of these concerns was the ability to find the right documents quickly.

“Flat” filing system not making it

In the Tocci tradition of proactive problem solving, Brian Bouchard, Director of IT, was looking for ways to improve both project and operational efficiency to capture project bonuses, keep overhead down, and retain a healthy profit while still achieving the excellence the company has embodied for over 85 years. To do all that, he knew they’d have to start with an alternative to the ‘flat’ filing system of shared network folders they’d been using. The old system was proving inadequate. For example, project team members were spending too much time just trying to find documents. There were too many copies in too many places with no effective method of versioning.

Bouchard says they first tried using third-party search tools like Microsoft Lookout, but the problem was that it was only good for searching on the computer it was installed on. They needed a tool that supported both shared indexing and file access. They tried to train their people to indicate file versions by file name, but that didn’t work either. “Everybody has their own way of putting documents into a flat filing system,” says Bouchard. “And version control is done differently by every single person.”



“ Document Locator helps us reduce our legal risk; we always know which version of a contract, RFI, or drawing is the current one. ”

Brian K. Bouchard

Director of IT
Tocci Building Corporation
Woburn, Massachusetts



Microsoft
GOLD CERTIFIED
Partner

Seamless
Windows
Integration

Enterprise-class Document Management Solution

After doing some research and consulting experts, Bouchard decided they needed an enterprise document management system that would provide a central place to store all project information, support shared indexing, and automatic versioning. After careful review, they selected Document Locator. What sold him on Document Locator was its ease-of-use, its seamless integration with Windows Explorer, the prevalence of great features, and the price.

Capturing slips, retaining profit

Document Locator provided Tocci with a centralized repository with automatic versioning, security, and full-text indexing and comprehensive search tools. But there was more.

With paper punch slips, invoices, RFIs, and change orders coming in from field offices, sometimes paper didn't make it into the system where it could be processed and tracked. "Every contracting company has the problem of missing slips, or slips that aren't recorded and slips that aren't being back-charged," says Bouchard.

Document Locator provided a solution for this problem as well. Tocci is using Document Locator's optional Scan Station Module, software that works with their scanners, to incorporate paper into the electronic repository and associate it with project records in Prolog®. The scans are automatically tagged with Prolog project information pulled from cover sheets,

associating them with RFI numbers and related vendor, job, and owner data.

"In our old system, if there was an issue that we needed to do a back charge on, it was hard to find that slip of paper. Or, if we had the paper, we couldn't tell just from looking at it what issue or RFI it was related to. But if that paper has been recorded in the new system and tagged accurately with metadata, then we can search on it when it comes time to do a back charge," Bouchard says.

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Brian Bouchard
Director of IT

Lowering litigation costs, reducing risk

Litigation is an overhead cost that eats away at building industry companies' profits. In the case of litigation, where time is truly money and legal fees accrue by the hour, the inability to find documents quickly can be very costly. The discovery process can take weeks or months, so the faster an attorney can find the needed documents, the less costly the process is for Tocci.

"In complex mediations or cases, many documents may require review. It becomes important to have as much of the paper material scanned into Document Locator as possible. The more information we can readily access through the central, searchable system, the less expensive the legal process is," Bouchard says.

Legal risk is also reduced with the ability to maintain current versions of contracts, RFIs and drawings, he notes.

Next up: Prolog integration and improving collaboration

Although they've been using dynamic metadata pulled from Prolog to tag project documents, they will soon be taking advantage of Document Locator's enhanced integration with the popular project management application offered by Meridian Systems®. Currently, they can see from Document Locator which documents are associated with a Prolog record. Soon they will be able to search the entire repository from within Prolog for any documents related to any data held in a Prolog record field.

Also in the works is a shift from using FTP sites to sharing documents with outside stakeholders using Document Locator WebTools. Bouchard says they've already got several test sites up for their clients, and so far the feedback has been great.