0 The Art of Information Management for Project Managers

0.1 Summary

With the ever-increasing speed and quantity of information project managers must process, mastering the art of information management is the key to a successful project. This seminar will examine modern tools and techniques for managing, tracking, analyzing and controlling project information more effectively and in less time.

0.2 Abstract

Architects are in the information business but few architectural firms have modern information management systems in place. Although using computers, most firms manage their projects using techniques transferred from the paper world and fail to take full advantage of technologies currently available. Architects must begin to think “data” not “documents.” They cannot manage projects effectively with what amount to electronic versions of folders and files. They must abandon the paper metaphor in favor of a more sophisticated and comprehensive approach to information management.

Spreadsheets and word processing documents are standard project management fare but do little to assist the project manager in actually tracking and analyzing the information. Tools built on easy-to-use database software can effectively tackle the problem but few firms know how to utilize the technology effectively.

This presentation is a blend of project management, information management and computer technology concepts. It will examine an architect-designed information management system built on cross-platform, multi-user, web-capable, relational, database management technology. The participants will receive real-world techniques and methodology on how to change their current way of thinking and construct their own information management system thereby making them more effective project managers.

0.3 Learning Objectives

Participants will understand how to overcome real and imagined obstacles to effective project information management.

Participants will learn various methods for filtering, classifying, storing and retrieving project information more quickly and effectively.

Participants will be able to use knowledge gained to implement a more comprehensive information management strategy in their practice.

4 Information Anxiety

4.1 Paper-Bound Management

4.2 Too Many Data Sources

4.3 Too Much Data

4.4 Too Many Tools

4.5 Disorganized Process

4.6 Information is Fragmented and Irretrievable

5 Digital Transition Stalled

5.1 Most Firms Still in Transition

5.2 Some Firms Can't Let Go of the Past

5.3 Parallel Systems = Duplication of Effort

6 Dealing with Paper

6.1 Avoid it When Possible

6.2 Incentives for Digital Data

6.3 High Speed Scanning

6.4 Standardize on PDF

6.5 Incoming Document Log

6.6 Coordinate Paper and Electronic Filing Systems

7 Too Many Data Sources

7.1 Analog

Snail Mail
Phone Calls
Meeting Notes
Phone Messages
Courier
Voice Mail

13 LATCH

13.1 Location

13.2 Alphabetic

13.3 Time

13.4 Category

13.5 Hierarchy

14 Too Many Tools

14.1 CAD

14.2 Accounting

14.3 Information Management

Disconnected Collection of Tools
Word Processor
Spreadsheet
Project Scheduling
Email
Web Browser

15 Disorganized Process

15.1 Need Uniform Methodology

15.2 Uniform Organizational System

15.3 Coordinate Paper and Electronic Filing Systems

15.4 Maintain a Digital Workflow

16 Maintain a Digital Workflow

16.1 Use Paper as an End Product Only

16.2 Keep Workflow in Digital Form

16.3 Use Paper for Convenience Aside from Flow

16.4 Standardize on PDF

21.3 Filing System/File Naming Conventions

21.4 Standardize on PDF

21.5 Dominated by Database Management System

22 Information Management System Comparison

Conventional	**RDMS**
Does Not Scale Well	Designed for Scalability
Multiple Applications Varied Interfaces	One Dominate Application Uniform Interface
Saving, File Names, File Folders (a big problem)	No Saving (automatic), No Files, No File Names, No Folders
Single Organizational Structure (ad hoc, difficult to enforce standards)	Multiple Organization Structures (LATCH)
Single User (sharing is not real-time)	Multi-user (sharing is real-time)
Security & Access Options Limited	Security & Access Options Very Robust
One Data View (usually WYSIWYG)	Many Data Views (including WYSIWYG)
Duplication of Data	No Duplication of Data
Limited Linking and Cross-Referencing	Robust Automatic Linking and Cross-Referencing (links are internal and not easily broken)
Difficult to Access Difficult to Navigate	Easy to Access Central Menu
Not Space Efficient	Space Efficient
Backup Not Built In	Backup Built In
Data is Poorly Structured Difficult to Move to Other Systems	Data is Highly Structured (“Atomic”) Easy to Move to Other Systems
Smaller Initial Investment?	Larger Initial Investment
Archiving?	

23 Information Management System Uses

23.1 Contact Management

23.2 Correspondence

23.3 Email

23.4 Project Database & Log

23.5 Calendar

23.6 Project Scheduling

23.7 Time & Expense Tracking

23.8 Fee Management

23.9 Billing

23.10 Resource Management

23.11 Drawing Management

23.12 Specifications

23.13 Cost Estimating

23.14 RFI Log

23.15 Submittal Log

23.16 Detail Library

23.17 Marketing

23.18 CRM Customer Relationship Management

24 RDBMS

24.1 **R**elational

24.2 **D**ata**B**ase

24.3 **M**anagement

24.4 **S**ystem

25 RDBMS

25.1 Interface/Front End

25.2 RDMS

25.3 Operating System

26 RDBMS

26.1 LAN

26.2 WAN

26.3 WWW

26.4 Handheld Devices

26.5 Phones

27 Database 101

27.1	Spreadsheet	≠	Relational Database
27.2	Column	≈	Field
27.3	Row	≈	Record
27.4	Cell	≈	Cell (field on a record)
27.5	Table	≈	Table

28 Database 101

28.1 Project Database Example

28.2 Project Directory Example

29 Knowledge Management Example

29.1 Project Delivery System

30 Information Management System

30.1 Roll Your Own

30.2 Off The Shelf

30.3 Custom

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Books

Information Anxiety 2
Richard Saul Wurman

FAX & Voicemail Services

eFax
www.efax.com

MaxEmail
www.maxemail.com

OneBox
www.onebox.com

WildFire
www.wildfire.com

Information Management Systems

Architectronica
www.architectronica.com

Portfolio
www.arch-street.com

MarketEdge
www.mktedge.com

Integratis
www.integratisinc.com

PDM-Architect
www.solutionmakers.com

Primavera
www.primavera.com

Constructware
www.emergingsolutions.com

FrontRunner Project Manager
www.frontrunner.com

ProjectEdge
www.onlineproject.com

Deltek Vision
www.deltek.com

Ostara Office
www.ostara.com

Autodesk Buzzsaw
www.buzzsaw.com