



OFFICE MANAGEMENT

REAL ESTATE AND CONSTRUCTION PROJECTS CREATE VOLUMES OF DRAWINGS, SUBMITTALS AND DESIGN DOCUMENTS THAT ARE SHARED AMONG MULTIPLE TEAM MEMBERS AND OUTSIDE SUPPLIERS. THE CHANGEABLE NATURE OF PROJECTS REQUIRES EXTENSIVE TRACKING OF PLANNING AND DESIGN INFORMATION THROUGH OUT A PROJECT'S LIFECYCLE. THE PROLIANCE® OFFICE MANAGEMENT APPLICATION ALLOWS BUILDING OWNERS, DESIGN FIRMS, AND CONTRACTORS TO MANAGE THE PLANNING RESOURCES, THE COUNTLESS CORRESPONDENCE AND MEETING LOGS FOR A PROJECT OR PROGRAM WITHIN A SINGLE SOLUTION.



DESIGN MANAGEMENT

Office Management allows specifications and drawings to be approved early on, and the efficient management of submittals and shop drawing approvals during construction. Staying on top of each design document streamlines the overall process, reducing construction time and improving company performance.

FEATURES

- › **Drawings:** XML technology allows Proliance users to create documents that represent actual drawings and specifications. These documents include the number, title, version, discipline, percent complete and more. Drawing documents can be linked to the

actual files, and integrated with third-party document management systems.

- › **Drawing Packages:** Intelligent Drawing Packages can be assembled by grouping multiple drawings and specifications together. The Proliance Workflow Engine automates design package routing and approval processes.
- › **Submittals:** Proliance users can manage shop drawings, samples, manufacturer's product information and other items that must be submitted on a project.
- › **Submittal Packages:** The Workflow Engine can group multiple submittal items together and route the package through the approval process.

GROUP MULTIPLE DRAWINGS AND SPECIFICATIONS TOGETHER AND SPECIFY PACKAGE ROUTING TO A PRESCRIBED SEQUENCE OF REVIEWERS. THE REVIEW STEPS CAN HAPPEN IN PARALLEL OR IN A SERIES, AND ARE LINKED TO THE OVERALL STATE OF THE WORKFLOW.

The screenshot shows the Proliance software interface with a table titled "DRAWING PACKAGE: 75% Construction Documents (11)". The table lists review steps, reviewing contacts, companies, and planned dates.

| *Step Number | Reviewing Contact | Reviewing Company | Original Planned Start Date | Original Planned Finish Date |
|--------------|-------------------|-----------------------|-----------------------------|------------------------------|
| 1 | Butch Cowher | Golden Engineers | 5/21/2005 | 5/26/2005 |
| 2 | Bill Tobin | Wilson Electric | 5/26/2005 | 5/30/2005 |
| 2 | Thomas Lewis | Lee Wilson Architects | 5/26/2005 | 5/30/2005 |
| 3 | Earl Little | Harrick Steel | 5/30/2005 | 6/6/2005 |



CORRESPONDENCE MANAGEMENT

Through out the project lifecycle, meetings take place, questions are asked and answered and general correspondence flows between people in multiple departments and companies. Office Management documents each correspondence in an audit trail, creating an accurate history of the project's evolution, including management of outstanding action items and issue tracking and resolution.

FEATURES

- › *Correspondence Documents:* Retain records of conversations and important general correspondence on each project.
- › *Meeting Minutes:* Record meeting discussions, outstanding issues and resolution plans. Update and track meeting items in real time, including item history, and manage the resulting action items assigned to each person.
- › *Requests for Information (RFIs):* Carefully track RFIs and create permanent documentation over project lifecycles.
- › *RFI Issues:* Group together related RFIs arising from complex designs and unforeseen issues to streamline approvals.
- › *Transmittals:* Maintain permanent, easy-to-access records of explanations or instructions from transmittal documents sent to various parties.
- › *Transmittal Packages:* Package similar transmittals together and easily route for approval or acknowledgement across the organization.

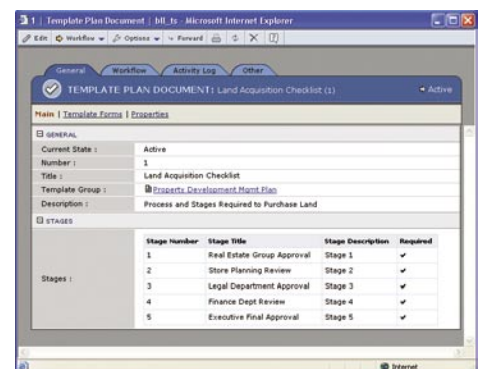
CREATE DETAILED MANAGEMENT PLANS WITH YOUR OWN DEFINED STAGES OF ROUTING AND REVIEW. EACH STAGE CAN BE LINKED TO MULTIPLE FILES FOR PROCESSING.

PROJECT MANAGEMENT PLANS

Establishing enterprise best practices requires project participants to work with certain documents and to apply standard processes. Common industry documents include “proceed/don't proceed” project checklists, monthly or quarterly financial checklists and corporate safety checklists for various projects types. Using management plans, senior managers can ensure that employees and partners follow best practices by including a timeframe or key milestone for critical process completion.

FEATURES

- › *Organization Perspective:* From within the Proliance organizational workspace, management teams can define corporate management plans and checklists and push down the appropriate set of plans to the program or project.
- › *Program and Project Perspective:* Once management plans are in place, each document can proceed through a series of stages based on a company's defined best practices. Management plans can require the project team to fill out multiple documents in a certain sequence and then route them through an approval process.



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