12d International Innovation Awards

Chris Bull

12d Synergy Customisation

HIGHLY COMMENDED: 12D SYNERGY

Name:	Chris Bull	Category:	
Position:	Administration Manager	☐ Design & Visualisation	
		☐ Survey & Construction	
Company:	RCS Group Australia	☐ Drainage, Sewer, Utilities & Rivers	
		☒ Customisation	
Name Project:	12d Synergy Customisation	☒ 12d Synergy	
Client:	Various		

RCS GROUP

SURVEY   PLAN   DESIGN   MANAGE

Description of Project:

Customise 12d Synergy to control and monitor a wide variety of processes involved in the delivery of complex surveying, town planning, civil design, and project management services to our valued clients.

Description of problem faced / task undertaken:

RCS Group manages a wide variety of project types on behalf of our valued clients. Individual projects types can have differing tasks, checklists, and documents associated. We require a system that coordinates, controls, and records what work was done, who did the work, and when the work was done. We also require a system offering as core functionality the ability to provide version control of revised documents ensuring clients are issued with the correct documents and if necessary the option to roll-back to earlier versions.

How the problem was solved:

By utilising 12d Synergy features we have been able to customise nearly half of the some 60 templates required to define the specific requirements for each of the project types we manage.

Using "tree functionality" we have been able to create two tree lists, one containing all the job and document templates in our company library and the other showing all our client's projects.

Using the "dashboard" functionality we have customised a screen to display all the important information pertaining to each job type. Creating a "job status" attribute allows us to sort & view our projects based on status, i.e. Proposed, current, awaiting payment, and completed.

Using the "tasks" functionality we have defined processes steps and roles for each job type. An early step in every process is to "allocate staff" where the "teams" functionality is used to allocate staff to generic roles defined in templates.

Once the team is defined emails are sent to staff alerting them of their new task. Staff use the "tasks" functionality to record their progress and close their task when completed. As tasks are completed the process steps forward with automated emails sent to those involved thereby coordinating the process. The "task" functionality also offers managers a quick and easy overview of the work progress on any given project.

With each job type there are a variety of technical documents and correspondence to store and manage. Using the "file and folders" functionality we have defined a folder structure where staff can upload and store documents.

Using "file naming rules" functionality we have forced a standard unique file naming convention for all files stored in 12d Synergy. This unique file naming convention allows us to know to which project a file is related and the exact date and time the file was created. By forcing a "File Description" attribute for all files the staff are able to enter a description for the contents of the file to allow easy location of documents.

Using the "Add file" functionality and designing a suite of document templates (from complex letters to simple envelopes) it is possible to automatically merge job data into documents to save time and reduce data entry errors.

Using the "File Versioning" functionality we are able to control the revision of documents and have the option to "roll-back" if necessary.
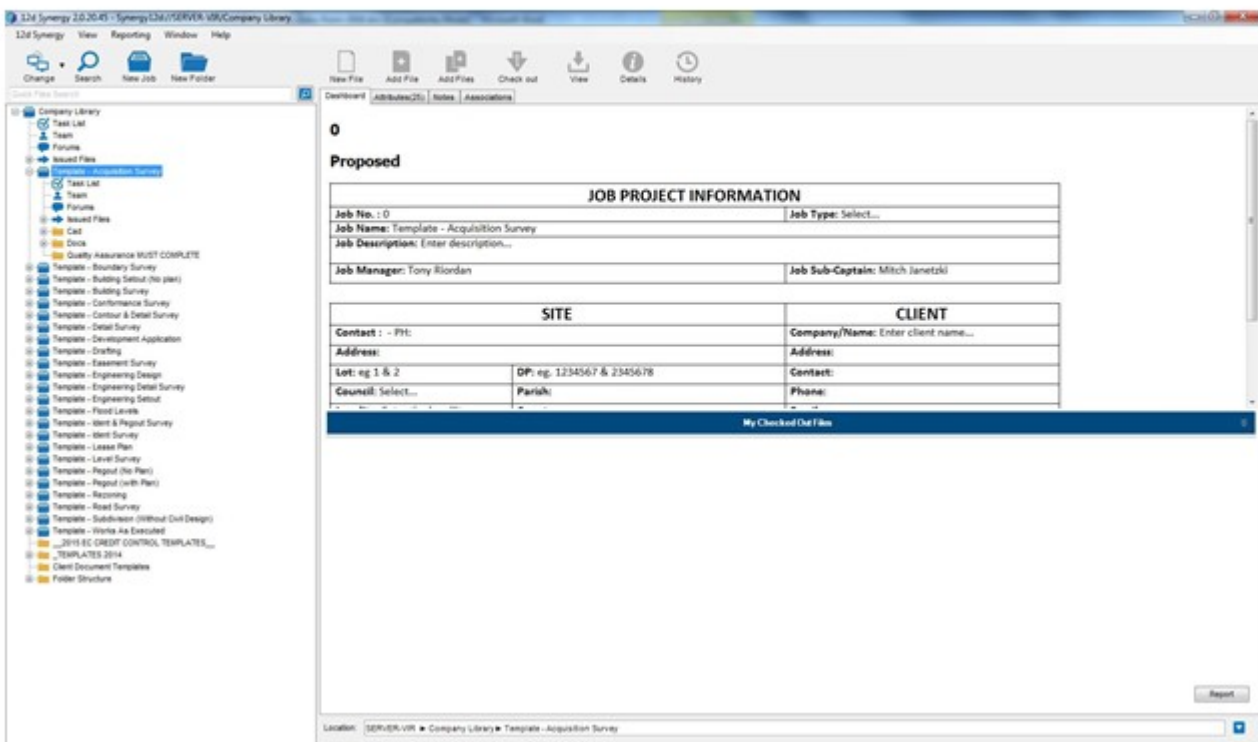
12d International Innovation Awards

Using the "Outlook plug-in" functionality we are able to store all incoming and outgoing emails and any attachments into specified folders within each project type thereby preserving a history of all the email correspondence for a given project.

Relevant 12d screenshots and/or data attached:

Customised Tree & Project Dashboard

12d International Innovation Awards

Customised tasks

12d International Innovation Awards

Customised Folders