



12d[®] International Conference

2016

12d International Innovation Awards

Chris Bull 12d Synergy Customisation

HIGHLY COMMENDED: 12D SYNERGY



Name:	<input type="text" value="Chris Bull"/>	Category:	<input type="checkbox"/> Design & Visualisation
Position:	<input type="text" value="Administration Manager"/>	<input type="checkbox"/> Survey & Construction	
Company:	<input type="text" value="RCS Group Australia"/>	<input type="checkbox"/> Drainage, Sewer, Utilities & Rivers	
Name Project:	<input type="text" value="12d Synergy Customisation"/>	<input checked="" type="checkbox"/> Customisation	
Client:	<input type="text" value="Various"/>	<input checked="" type="checkbox"/> 12d Synergy	



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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.

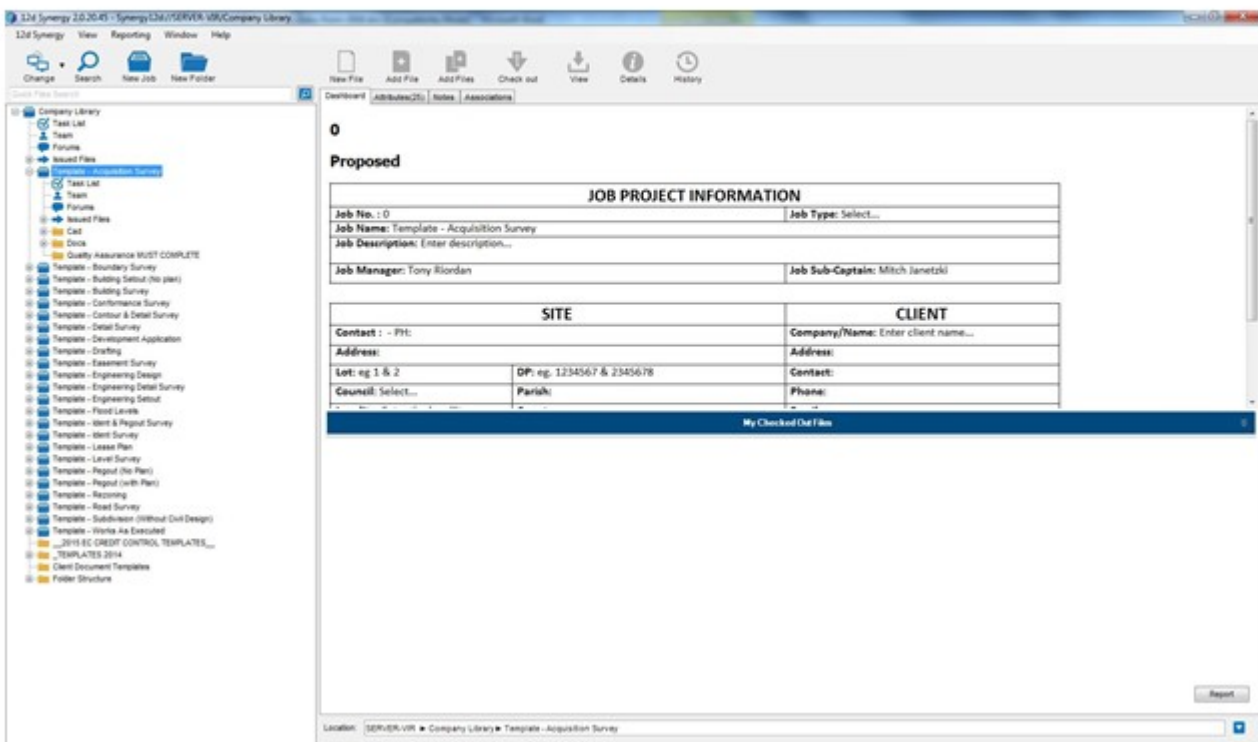


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Using the “Outlook plug-in” functionality we are able to store all incoming and outgoing emails and any attachments into specified folders within each project type thereby preserving a history of all the email correspondence for a given project.

Relevant 12d screenshots and/or data attached:

Customised Tree & Project Dashboard





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Customised tasks

12d Synergy 2.0.20.45 - Synergy12d/SERVER-VSU/Company Library

12d Synergy View Reporting Window Help

Change Search

Task List Search

Name	State	Assigned to?	Progress	Priority	Start Date	Due Date
Preparatory	Not Started	Admin		Medium	4/22/2016	
- Call Search	Not Started	Admin		Medium		
- Print Job Packet	Not Started	Admin		Medium		
- Create Customer ...	Not Started	Admin		Medium		
- Register PPSR	Not Started	Admin		Critical		
- Allocate Resources	Not Started	Project Manager		Medium		
- Survey Search & Pre...	Not Started	Surveyor		Medium		
- Field Survey	Not Started	Surveyor		Medium		
- Office Catch	Not Started	Surveyor		Medium		
- Drafting	Not Started	Draftsman		Medium		
- Quality Assurance	Not Started	Surveyor		Medium		
- Plan Sign-Off	Not Started	Registered Surveyor		Medium		
Billing and job closure	Not Started	Admin		Medium		
- Create invoice in ...	Not Started	Admin		Medium		
- Scan invoice in ...	Not Started	Admin		Medium		
- File Hardcopy in ...	Not Started	Admin		Medium		
- Set 12d Job Status	Not Started	Admin		Medium		
- Send invoice and ...	Not Started	Admin		Medium		
- Monitor Payment	Not Started	Admin		Medium		
- Receive payment ...	Not Started	Admin		Medium		
- Set 12d Job Status	Not Started	Admin		Medium		

Filter:

Location: SERVER-VSU > Company Library > Template - Acquisition Survey > Tasks

12d Synergy 2.0.20.45 - Synergy12d/SERVER-VSU/Company Library

12d Synergy View Reporting Window Help

Change Search

Save Email

Role	Contact	Is User?
Draftsman	Sam Condon	Yes
Project Manager	Mich Janatovic	Yes
Admin	Chris Bull	Yes
Surveyor		
Registered Surveyor	Tony Rendon	Yes

Location: SERVER-VSU > Company Library > Template - Acquisition Survey > Team



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Customised Folders

The screenshot displays the 12d Synergy software interface. On the left, a tree view shows a hierarchy of folders under 'Company Library', including 'Task List', 'Team', 'Forums', 'Award Files', and 'Template - Acquisition Survey'. The main area shows a task list with columns for Name, State, Assigned to?, Progress, Priority, Start Date, and Due Date. The tasks are listed as follows:

Name	State	Assigned to?	Progress	Priority	Start Date	Due Date
Preparatory	Not Started	Admin		Medium	4/20/2016	
- CRE Search	Not Started	Admin		Medium		
- Print Job Packet	Not Started	Admin		Medium		
- Create Customer	Not Started	Admin		Medium		
- Register PPSR	Not Started	Admin		Critical		
- Allocate Resources	Not Started	Project Manager		Medium		
- Survey Search & Pre.	Not Started	Surveyor		Medium		
- Field Survey	Not Started	Surveyor		Medium		
- Office Calls	Not Started	Surveyor		Medium		
- Drafting	Not Started	Draftsman		Medium		
- Quality Assurance	Not Started	Surveyor		Medium		
- Plan Sign-Off	Not Started	Registered Surveyor		Medium		
- Billing and job closure	Not Started	Admin		Medium		
- Create invoice in.	Not Started	Admin		Medium		
- Scan Invoice to e.	Not Started	Admin		Medium		
- File Hardcopy in.	Not Started	Admin		Medium		
- Set ICE Job Status	Not Started	Admin		Medium		
- Send Invoice and	Not Started	Admin		Medium		
- Monitor Payment	Not Started	Admin		Medium		
- Receive payment	Not Started	Admin		Medium		
- Set ICE job status	Not Started	Admin		Medium		