Deltek INSIGHT ›2019

PIM-09:

Collaborate with Project Stakeholders at a New Level Deltek PIM and Deltek Collaboration

Nick Nieder and Phil Shaw, Deltek

Speakers

Nick Nieder
Director, Product
Management

Phil Shaw
Senior Product
Manager

Today's Story

» From Kona to Infinity and Beyond

» Your Collaboration Options

» Setting Up PIM Integration

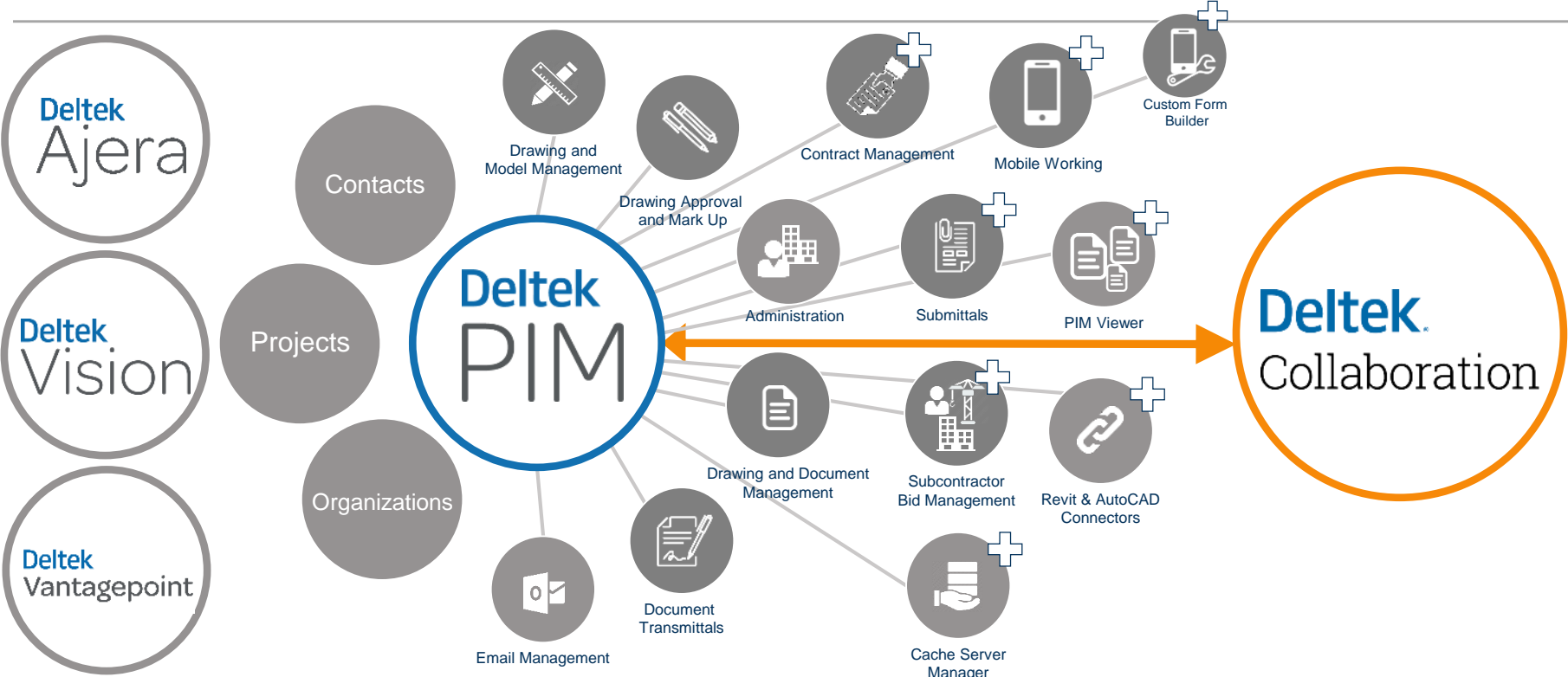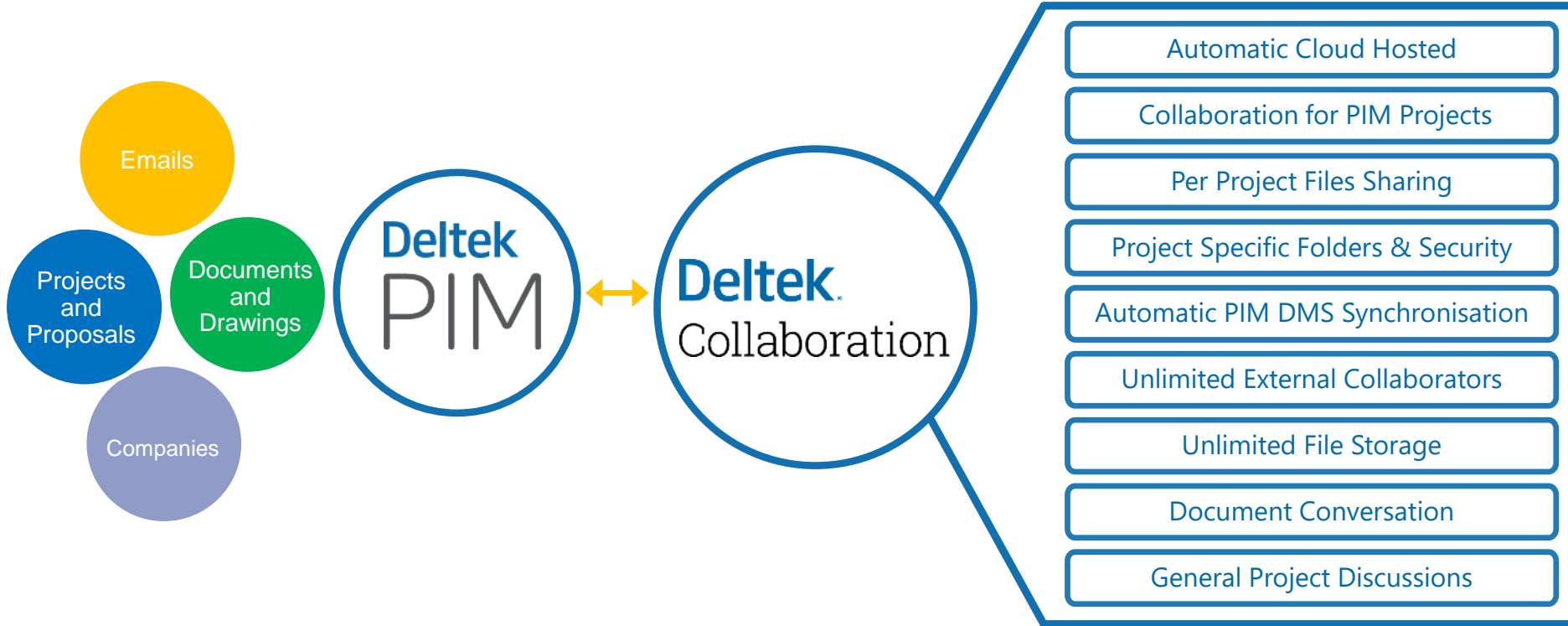» Collaboration in Action

The Evolution of Collaboration

Connecting Teams Like Never Before

» Social collaboration continues

   » Empower collaboration from your Deltek product

» Document-centric collaboration

   » Gain efficiency

   » Maintain one place of truth

   » Extend PIM document sharing

PIM Core & Collaboration

Deltek Ajera

Deltek Vision

Deltek Vantagepoint

Contacts

Projects

Organizations

Deltek PIM

Drawing and Model Management

Drawing Approval and Mark Up

Contract Management

Mobile Working

Custom Form Builder

Administration

Submittals

PIM Viewer

Drawing and Document Management

Subcontractor Bid Management

Revit & AutoCAD Connectors

Document Transmittals

Email Management

Cache Server Manager

Deltek Collaboration

Deltek Collaboration with Deltek PIM

Emails

Projects and Proposals

Documents and Drawings

Companies

Deltek PIM ↔ **Deltek Collaboration**

- Automatic Cloud Hosted
- Collaboration for PIM Projects
- Per Project Files Sharing
- Project Specific Folders & Security
- Automatic PIM DMS Synchronisation
- Unlimited External Collaborators
- Unlimited File Storage
- Document Conversation
- General Project Discussions

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Why Collaborate with PIM?

» Gain efficiency when collaborating

» Maintain your one place of truth

» Extend PIM document sharing to the cloud

» Improve drawing and document review process

» Share PIM documents on the cloud

» Simple rapid deployment from PIM

» Empower self service information access

Dangers of Not Collaborating

Deadlines missed
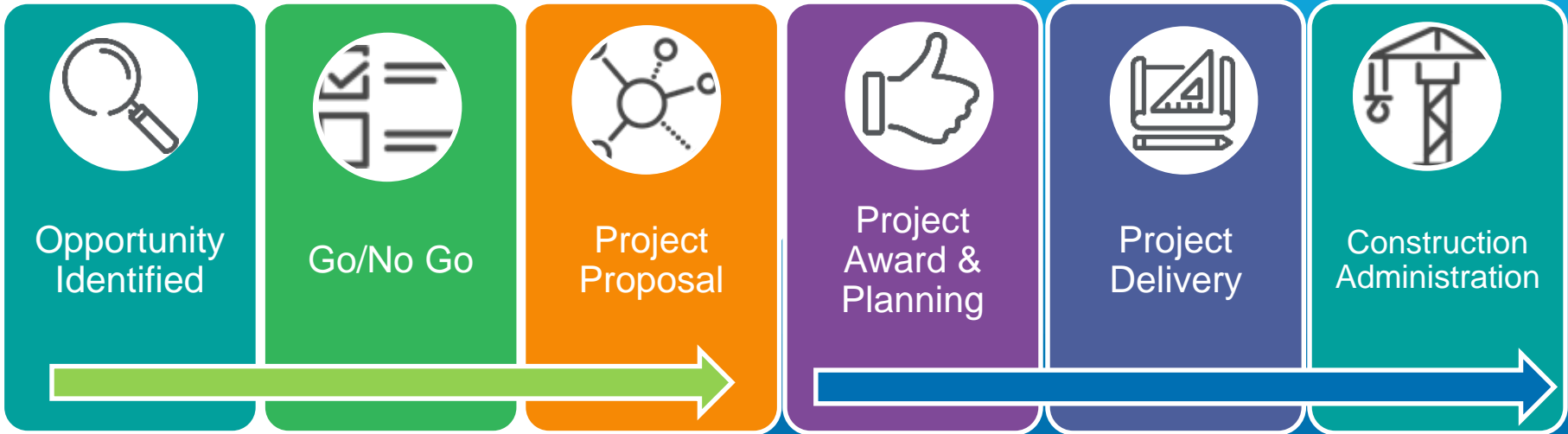
Design compromised
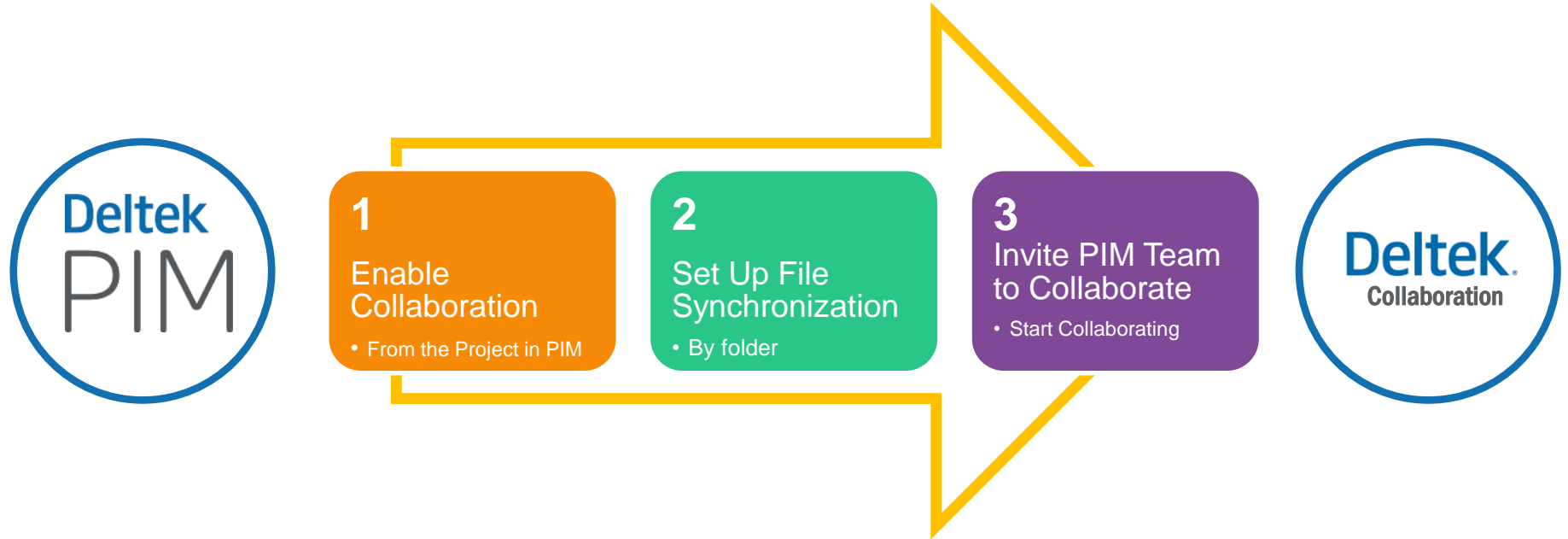
Out-of-date information

Time wasted

Avoid Errors and Rework

Conflicting versions

When Do Teams Collaborate?

Deltek Collaboration − PIM Integration 1-2-3

1
Enable Collaboration
• From the Project in PIM

2
Set Up File Synchronization
• By folder

3
Invite PIM Team to Collaborate
• Start Collaborating

Collaboration in Action

Collaboration in Action

Architect (and Deltek PIM user) creates project collaboration space and invites engineer to participate

Architect sets up design files to be transferred from PIM into Collaboration and begins conversation with engineer

Architect and engineer discuss design and arrive at a great solution

Architect moves drawings into the owner area of Collaboration for review at owner's leisure

Phil the Architect

Phil needs to get his design agreed prior to a presentation to the owner at the end of the week

Nick the Engineer

Nick is working with Phil on the Atlantic Mall project and will input into the design

Phil the Architect

Getting the Project
Started in
Collaboration

Phil the Architect

Set Up File Synchronization from PIM to Collaboration

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Phil the Architect

Getting the Word Out to the Rest of the Design Team

Nick the Engineer
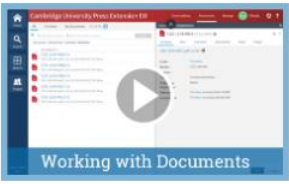
Signs up for
Collaboration and joins
the project space

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Product Help

View Product Help

Featured Videos

Getting Started

Working with Documents

Collaborating on Documents

Drawings Pushed from PIM to Collaboration

Phil the Architect

Drawings Pushed from PIM to Collaboration
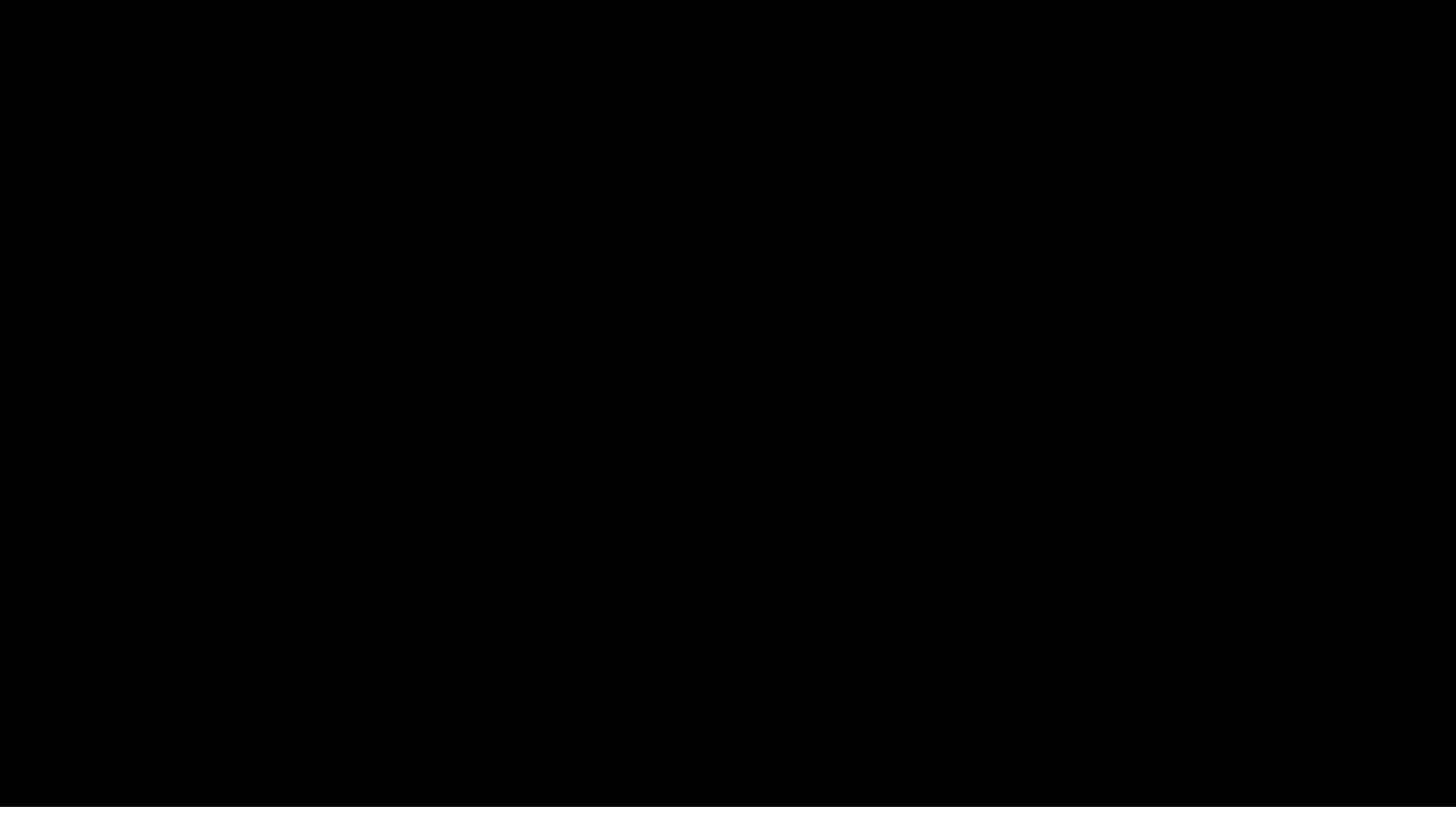
Nick the Engineer

Nick is notified that there is a new file to review

Phil the Architect

Sees the comments added by Nick and adapts the design accordingly. A revised file is entered in PIM which is automatically pushed into Collaboration

Nick the Engineer

Nick views the new design and signs off on it

Phil the Architect

Moves the file so that it can be seen by the Owner

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Mike the Owner

Can view the file but does not have access to the conversation and history.

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Collaboration in Action

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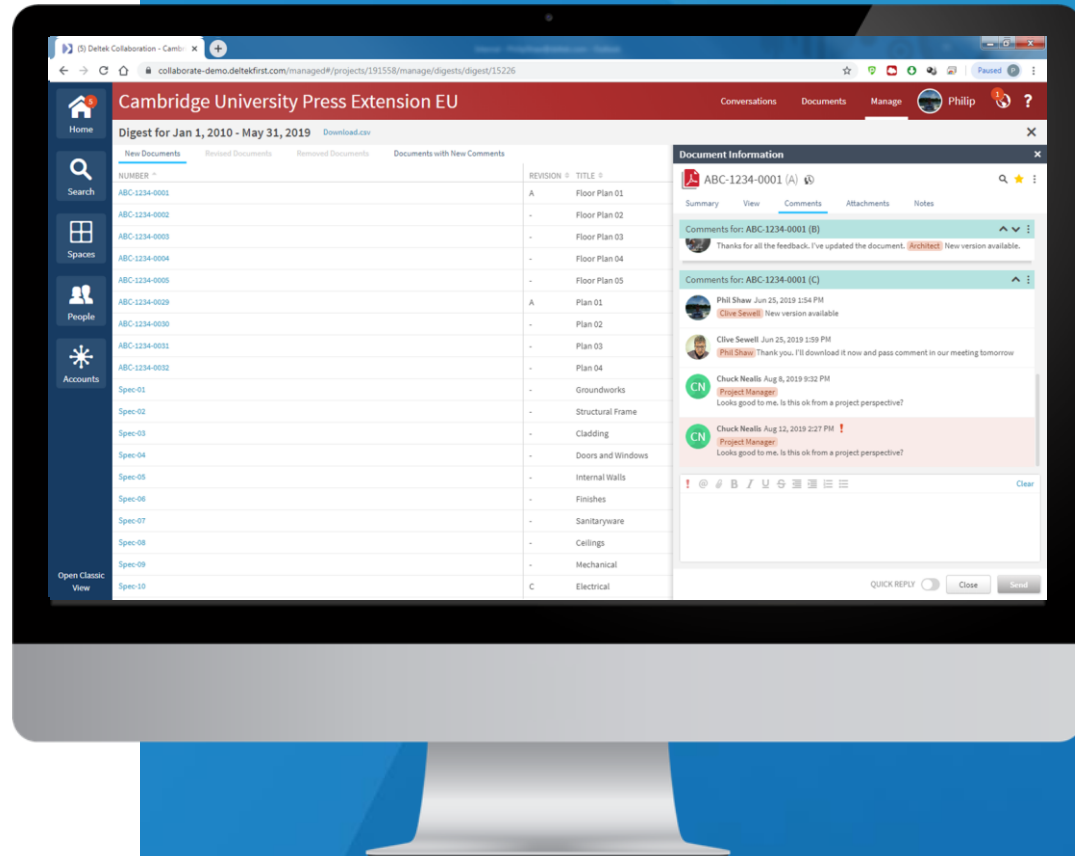# Keeping Track of Activity

Set up Digests

» Daily digests sent to all members and guests

» Covers:

  » New documents

  » Revised documents

  » Removed documents

  » New comments on documents

Set up Notification Emails

» Personal settings for

  » Daily Digest

  » Invitations

  » Urgent comments

  » Comments where you are mentioned

  » Comments where you group is mentioned
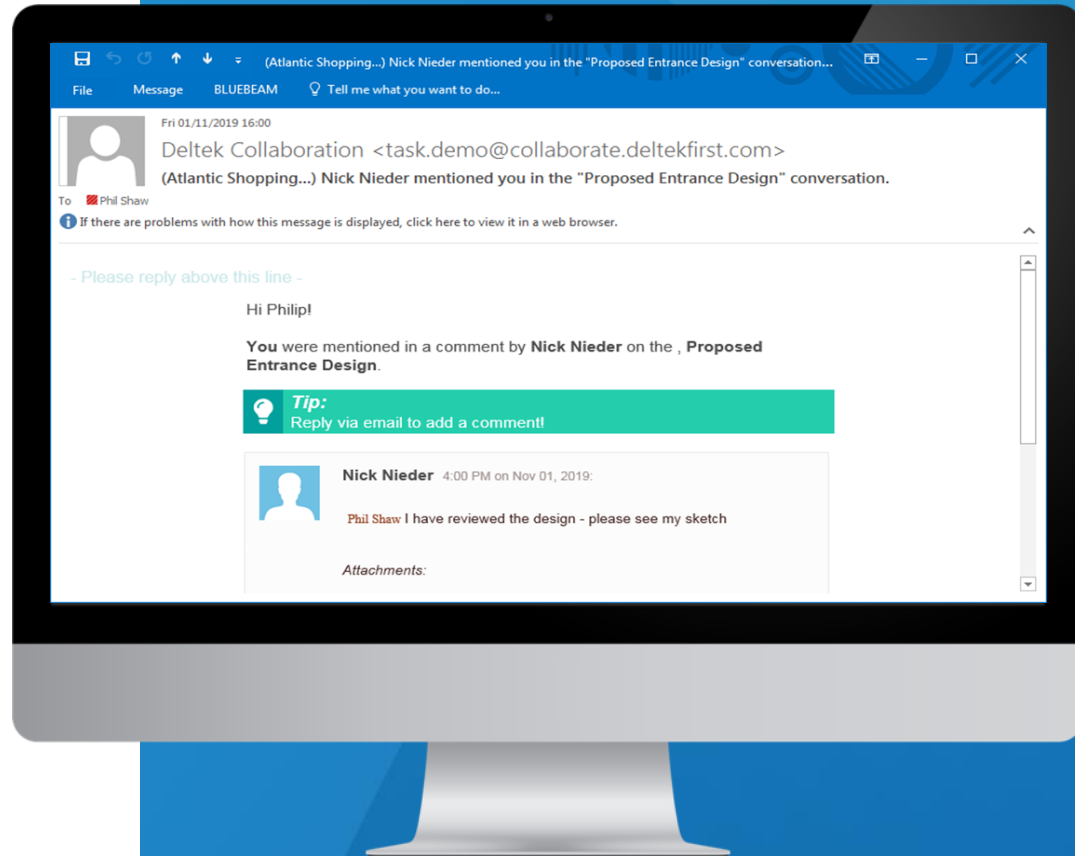
Getting Help

Getting Help

» Link to help on every page

» Help Videos

» Comprehensive help menus

» Searchable
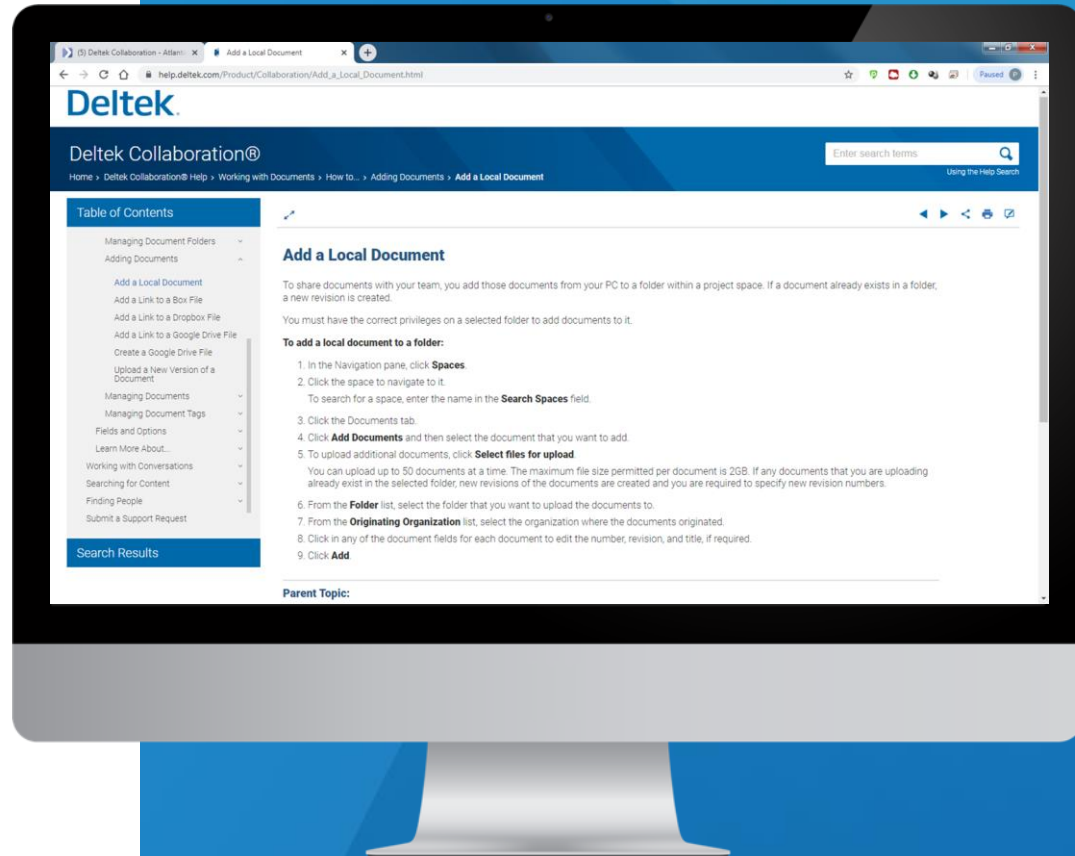
Conclusions

Deltek PIM and Deltek Collaboration

One Source of Truth

Capture — Capture project emails, documents and drawings required to deliver a project in one central location.

Organize — Organize and control project information and document revisions, making them searchable and saving you time.

Simplify — Simplify project delivery processes by streamlining the way project documents such as RFIs are tracked.

Collaborate — Collaborate more efficiently by empowering internal and external teams to make and document decisions quickly.

Protect — Protect your company with a robust quality control process and audit trail to mitigate risk and resolve disputes faster.

Summary

» Increase productivity

» Boost connectivity

» Streamline feedback

» Improve privacy and security

» Collaborate beyond the project

Q&A

Visit the UX Kiosk in the Expo Hall

» **PIM-09 Collaborate with Your Project Stakeholders at a New Level with Deltek PIM and Deltek Collaboration**

　　» Stop by the UX Kiosk in the Expo Hall to share your Insights with us!

　　» We are looking for usability participants who are heavy project document users to help us evaluate concepts for Deltek Collaboration. If your company is interested drop us a business card.

» Complete self-directed usability test sessions in a genius bar type setup on topics the product teams are ideating on.

» Schedule a 1:1 Usability session that will take place in the Usability Lab.

» All the data gathered here helps drive product design decisions!

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Deltek PIM at Insight 2019

Project Process

Customer Story

What is Deltek PIM? The 21st Century Way of Managing Information	Preparing for Growth with Deltek PIM: What's the ROI	Empower Users to Get the Most Out of Your Data, Regardless of Role	Modernizing Firm Communication with Deltek PIM	Roadmap for Deltek PIM: The Future is Now	Integrating PIM into a Complete Project Management Strategy
PIM-11 Tuesday 11:10 AM	PIM-04 Tuesday 2:10 PM	PIM-10 Tuesday 3:20 PM	PIM-02 Tuesday 4:30 PM	PIM-07 Wednesday 10:00 AM	PIM-01 Wednesday 11:10 AM

COME LEARN MORE!

Design Process: Manage Your Project More Effectively with Deltek PIM	How to Make Your Implementation Great: A Customer Panel Discussion	Collaborate with Your Stakeholders at a New Level with Deltek PIM and Deltek Collaboration	PIM Email Management: Tips & Tricks	Journey to Deltek PIM	Construction Administration: Execute Your Project More Effectively with Deltek PIM
PIM-06 Wednesday 2:10 PM	PIM-08 Wednesday 3:20 PM	PIM-09 Wednesday 4:30 PM	PIM-03 Thursday 8:30 AM	PIM-12 Thursday 9:40 AM	PIM-05 Thursday 10:50 AM

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Next Steps

1. Complete the session survey in the mobile app.

2. Utilize the Post-Event Toolkit to share what you've learned.

3. You can download Continuing Education credit information from your certificate hub link. The link is in the mobile app and will be emailed to you after the conference.

Downloading Presentations?

❯ Available presentation PDFs are in the Insight Attendee Portal (Schedule Builder) and in the mobile app.

❯ Online and mobile app access to this year's presentations expires on March 1, 2020.

#deltekinsight

collaborate-demo.deltekfirst.com/managed#/projects/191742/documents

Atlantic Shopping Mall

Conversations   Documents   Manage   Philip

All   Favorites   My Documents

SORT BY: Date

Home 5
Search
Spaces
People
Accounts

Folders

- Documents
  - Progress Photos
  - Published
  - Shared Area
    - 01 Architectural
    - 02 Structural
    - 03 Civil
    - 04 Mechanical & Elect...
    - Drawings
    - Minutes
    - Owner
    - Reports
    - Specifications
  - Upload Area
  - Removed Documents

Add Docu...

Documents / S

ACTIONS

ORIGINATING ORGANIZATION   TAGS

Email Help Desk

SELECT SPACE *

Atlantic Shopping Mall

TO   FROM

philipshaw@deltek.com   philipshaw@deltek.com

☐ Send a copy to me

SUBJECT *

Required

MESSAGE *

🔗 B I U S̶ ☰ ☰ ☰ ☰ ☰   Clear

Required

Cancel   Send

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