The Use of ProjectEDGE (Classic Version) for Managing the Expansion of a Retail Chain or Renovating its Existing Stores

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Last Revision Date: May 16, 2006

Overview

ProjectEDGE is a client server and Internet browser-based extranet application for managing new store openings or the renovation of existing store locations. Through its secure access, ProjectEDGE can be used by personnel in the retailer's offices as well as by mobile field representatives, architects, engineers and contractors to transact business in one common database.

Wherever users and team members are located, they can still get their jobs done. Users can work on-line as well as off-line in instances where an internet connection is not available.

Team members are alerted via e-mail, PDA or messaging when users or the system have notified them that action is required. Individuals can alert other team members by assigning them access to an action item. Users have the ability to define workflow and approval processes based on various events and processes within the cycle of your projects. These workflows are defined by document type, RFI, Change Order, Service Request, etc. Based on these workflow instructions, the system will automatically alert individuals as they become the next responsible part of any given workflow process.

Web Page

A web page can be set up as a portal page linked to other web pages such as an overall corporate page. The web page will have both a public and a private side. The private side will be accessible only by persons with an authorized user name and password as well as users defined role(s). The public side would be available for anyone with Internet access. The content of the public page could include such information as a general statement of the type of expansion being done, bid opportunities, and directions to each of the respective stores for shipping and receiving. The content of the public page is entirely up to the users with only selected individuals being given the right to make changes.

Roll-up

This white paper is written from the perspective of a single project that could be one of a few or one of many hundreds of projects in the retailer's rollout program. While a project would be managed at the detail level, the entire rollout program needs to be viewed at the retail chain level with a potential of summary subcategories at regional or district levels. Access to the information at any of these levels has to be controlled by secure access involving user name and password which may be further restricted by role(s).

Portal Pages

The portal page for retail enterprise, division or region will contain information such as the following for each project that is rolled up into that category:

- Store or unit number
- Store or unit name
- Division
- Department
- Projected and actual dates for user-defined milestones such as:
  - Lease letter of intent
  - Lease execution
  - Design start
  - Design completion
  - Construction start
  - Construction completion
  - Soft opening
  - Full opening
- SF GLA
- Budget information such as:
  - Total budget
  - Total committed
  - Total actual
  - Projected final

In addition to the above items, the roll-up can be customized for the particular needs of the retailer.

Web Conferencing

Either at enterprise or an individual project level, web conferencing allows collaboration with anything in the Extranet, as well as with third party applications. The web conferencing provides the ability for many individuals in various locations to simultaneously view drawings, budgets, photos or any other documents accessible by a computer of one of the participants. Through the use of various markup tools, annotations could be made on either an overlay, temporary or permanent basis depending on the intent of the participant.

Additionally, the same web conferencing resources make available instant messaging for use by any authorized individual. The instant messaging could be used on a one on one basis or can be used on a one to many basis by launching a full web conferencing meeting from the same tool. Whichever way it is done, the collaboration tools of the Extranet are more broadly distributed.

Action Items

Action items are used to track any follow-up or time-related item within the database. Some action items are created by users, others are generated by the application automatically and flags items that are coming due. Examples of action items include:

- Follow-up on completion of execution of a contract, change order or lease
- Expiration of contractor insurance certificates or bonds
- Follow-up to a letter, memo or other correspondence
- Follow-up on plan review
- Follow-up on completion or start milestones
- Follow-up on start of construction milestone or a milestone for checking the availability of the demised premises for start of construction
- Follow-up on a punchlist item
- Follow-up on owner provided items

- Follow-up on each item in a roll-out workflow

Contracts (including leases)

The execution status of both contracts and leases are tracked in the database. This section allows for managing such items as:

- Contracts and leases
- Change Orders
- Change Requests
- Contract Close-out
- Insurance Certificates
- Bonds
- Retention Releases
- Contractor invoice processing
- Purchase Orders
- Back Charges
- Lien Waivers
- Issue and follow-up on work order for service requested by a store manager

Communications

The communication section is a place for storing and creating communication documents. Together with the phonebook section, the communication section has the full capability of a contact management program.

The features of the communication section include:

- Letters of any nature, including authorizations to proceed
- Memorandum, including collaborative memorandum
- Faxes
- Transmittals
- Notes made of conversation records and personal meetings
- Form letters for notices to contractors, landlords, etc.
- Printing mailing labels and envelopes as a way of reducing the administrative tasks involved in sending correspondence by conventional means.

Discussion

The discussion section uses threaded discussions for activities such as:

- Recording and verifying architectural and engineering programming content
- Value-engineering such as discussions of new materials for store fronts or display fixtures
- General improvement topics such as how to reduce delivery cycle time by entering into national contracts
- Issue management to track all Issues and their resolution
- Knowledge transfer
- Best Practice Library
- Publishing operating manuals for store use

Drawings

The drawing section is used for collaborating on drawings, cataloging and distributing drawings. In addition to drawings, such other documents as specifications, architect supplemental information and tenant manuals could also be attached to the database. Authorized users review drawings on-line and apply nondestructive markups with web browsers.

The drawing section is used for such purposes as:

- Maintaining a current list of drawings

and sketches
- Maintaining historical drawing lists
- Maintaining archives of specifications, consultant and other reports
- Creating Architect's Supplemental Information
- Receiving notice of changes to drawings
- Publishing as-builts

Meetings

The meeting section is used for face-to-face and virtual meetings among any of the team members. The meetings can be regularly scheduled team meetings or meetings about specific stores. Some examples of the use of the meeting features are:

- Meeting minutes of lease or contract negotiations concerning one or more stores
- Pre-construction meeting minutes with landlord representative, mall manager or with contractors
- Meeting minutes with building permit and other local officials
- Action items to store contractor to check for landlord's certificate of occupancy before beginning work
- Comments made to weekly team meeting minutes by a team member who was not able to attend face-to-face, but attended virtually by reading the minutes and then adding comments

Phonebook

The phonebook section contains all the contact and lookup information for the database. Its uses include:

- List of all contacts categorized by user-defined categories such as contractor, architect, landlord personnel and any other needed categories
- Source of phone list and directory printed out before leaving on a trip

Photos

The photo section is used to document such items as:

- Store construction progress
- Condition of the store at the time of a particular visit, including photos taken to demonstrate whether the store is ready for your work to begin
- Photos of damage revealed after uncrating fixtures
- Progress photos sent in by contractor along with their invoice
- Any scanned, digital photograph or web cam capture

Punchlist

The punchlist section is used for managing the collection, distribution and correction of punchlist items, including such features as:

- Simplified, systematic input process
- Logs by responsibility and location
- Becoming action items when they become late
- Entry and/or update with a PDA by the project manager while doing a field inspection
- Templates of master punchlists

RFIs

The request for information section is used for both design and construction to clarify plan information and/or design decisions.

- Merchandise fixturing decisions can be documented through a planning RFI to capture why particular design decisions were made
- From the field, a contractor operating out of pickup truck could call his office and provide the details of an RFI, which are then entered electronically and transmitted to the tenant's office or architect.
- One of the tenant's project managers with a laptop could pull up a list and resolve any open RFIs while at the store site (or anywhere else)
- Any interested party such as the regional manager for that particular territory, could be given electronic notice of the RFI.

Safety

Depending on the type of work involved, the safety section provides an area to document such items as:

- Any injuries that occurred during construction
- Any injuries that occurred during occupancy, including those to customers
- A place to record hazardous material inventories

Service Request

The service request section is used to administer warranty claims and receive notices of expirations on warranties. It can be also used by the individual stores to request a service for a needed repair or any other service item that you decide to make available through the service request feature.

Service request uses include:

- Automatic notice of warranty expiration
- Processing request for repair work orders entered by a store manager
- Warranty administration

Submittals

The submittal section processes shop drawings or submittals for one or several stores. For example, one contractor might be building ten stores and make one submission that is applicable to all of them.

The submittal section is used in the following ways:

- Electronically process submittals using a workflow route
- Pull up submittals once a store is in operation to determine where to order replacement parts
- Process submittals electronically regardless of the various participant locations
- Use a standard list of submittals which are launched upon award of the work for the store and are tracked through their completion, including capturing the delivery date information

Management Report

The management report section is used by team members for various types of status updates, standard periodic reporting, etc. The application is delivered with many report templates. Additionally, users define as many user specific reports as needed. Some examples of reporting are listed below:

- Prepare a status report for each project during its planning and construction phases

- Collect daily reports from each site, including ones from the contractor(s)
- Capture and publish both schedule and budget information about one store or an entire program of stores

Search

The search features can be used in any of the sections, as well as in the overall database for such purposes as:

- Finding every reference to an item such as glass shelving
- Finding all correspondence and communication to or about a vendor such as XYZ Alarm Systems, Inc.
- All references to certificates of occupancy
- All references to a particular person such as the mall manager or a landlord.

For more information on ProjectEDGE, white papers or demonstrations, visit our web site at www.projectedge.com or contact us at 888-516-EDGE, Fax 315-471-6659 or e-mail at projectedge@edgewaternet.com.

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To learn more about The Use of ProjectEDGE (Classic Version) for Managing the Expansion of a Retail Chain or Renovating its Existing Stores, contact:

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