Archibus Storage
Closeout

Background:

During a LEAN event examining the Urgent Work Order Process an area of waste was discovered in the amount of paper transferred and stored. The Facility Maintenance team receives invoices for each work order which include all background materials, floor plans and craftsman's notes. The Accounts Payable team—in order to process an invoice for payment—requires only the work order and the Invoice. However, as a result of historical practice the facility maintenance division would simply pass on printed packets of background documentation to the accounts payable team to review, without regard to providing only what was actually required for the accounts payable team to perform their task. An average of 12 sheets of paper were printed and subsequently stored when the original format of reception was electronic; in some cases packets were as large as 20 pages

In fiscal year 2016, the Facility Maintenance team closed 13,681 work orders at an average of 12 pages per work order: 164,172 sheets of paper or 328 reams of paper. A cost of $1,410.00 for paper alone.
A second challenge identified was difficulty arising from the inability to quickly and effectively search and connect work orders to approved invoices.

Solution:

We identified the Archibus system as the storage device for the background information. This is the system that is used to open and close maintenance work orders. The Facility Maintenance Division are the primary users of the Archibus system. Storage into this system will be advantageous not only to save space and paper, but to quickly research past work orders and investigate previous issues.   It was the ideal space to store the background documentation. The only question was if there was enough space.

The BPIO investigated the storage capacity of the Archibus system. We found the system has 4 fields to attach documentation, we could add more, but there was no need. We identified one uniformed field where all background documentation would be stored. We discovered that even though it was only one field, we could store multiple documents to this field. The system uses its Document Library technology to create different versions. The only limitation is the system names all of the documents by the work order number then by version, so it is not easily identifiable, however, using the same field for all background information reduces this risk. Next it was discovered that the storage available for Archibus is 700 GB. We needed to ensure that our documentation does not take up all of the available storage.

To estimate the approximate storage per year, the BPIO took a sample of the invoices being emailed to determine the average size per file as scanning quality varies greatly between

vendors. It was determined that the average invoice is roughly 4-5MB file size. Storage per year would take 75GB/per year which falls well within our threshold. By the time the servers are at 75% DGS will be upgrading its storage capacity, which has not been upgraded in 2 years.

A guide was produced to give clear instructions to any personnel that would be scanning or saving to Archibus. This guide was distributed to the team. With input from the team the guide has been modified a number of times and training conducted with the lead personnel. This guide provides the standard operating procedure for not only uploading background documentation, but also to act as a pre-review guide in which data from the invoices is entered into Archibus as well.This reduces the burden on the reviewer to help speed up the overall process of invoice review.

This project eliminated the need to increase the real estate used to store paper background information. Additionally, it makes this information readily available for any personnel who must research a past work order or vendor. Another project as a result of the LEAN event was the establishment of an agency retention policy. Pursuant to this policy, over the next two years the current physical storage of background information will free up 40 square feet of usable office space. The project was conceptualized in Q2 FY17 and completed in Q3 FY17.