

Inteli-Scan

Intelligent record documentation for buildings



Inteli-Scan

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Introduction

Watson & Sole (W&S) have been working in the Building Industry for over 40 years. Applying our knowledge and feedback from Building and Facilities Managers and our experience managing and producing record documentation, we have developed a unique software tool called **INTELI-SCAN Version 5**.

This is the latest development of **INTELI-SCAN** and builds upon over 15 years of success of **INTELI-SCAN** LAN and Web.

INTELI-SCAN benefits the Built Environment industry with:

- clear and effective handover documentation production and delivery
- efficient use and maintenance of this information throughout the life of the property.



What is Inteli-Scan?

INTELI-SCAN is the Building Library, with the Project Management features to establish, develop, author, review, approve, update and store your building records with a search engine to retrieve the information.

INTELI-SCAN typically includes:

- O&M Manual including Descriptive Text and Literature
- The Testing and Commissioning Data
- The As Built and Record Drawings
- The Health and Safety File
- The L2 Building Energy Log Book and BREEAM User Guide

The Management Features allow for:

- Full on line document preparation and review
- Live KPIs and Reports
- Full Process Control
- Tools to manage the Testing and Commissioning Documentation

INTELI-SCAN provides:

- Fully hosted solution with failover and backup in a physically and technologically secure environment
- Fully indexed web solution to provide full text search capabilities in addition to user defined searches



Search

The **Search** Menu gives end users access to the Simple and Advanced Search Pages

The **Simple Search** shown below provides access to the information in four ways by inputting a keyword;

1. Documents by System

The Documents by System results are derived by searching the asset register, therefore finding any system where the assets have something related to the search you input, for instance the asset name, its location, or its system title

2. Documents by Popularity

The Documents by Popularity results provides a list of documents that fulfill your search criteria by having the word in the title, or the text of the document. The sorting of these documents is determined by which documents are in popular use by site users and comply with your search criteria.

3. Documents by Ranking

The documents by ranking provides a set of raw search results without any manipulation of the results by **INTELI-SCAN**. Click on any link to see the document.

4. My Recent Documents

Finally My Recent Documents provides a list of Documents you have recently viewed that fulfill the search keyword.

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My Work Search Reports Project: WCEC - Base Build Contact Us/Help

Advanced Search - Assets Advanced Search - Documents

Filter

Keywords: Go Reset

Documents by System

System Name	Assets	System	BRS	Drawings	Literature	Site Info	Test Data	CAD
Chilled Water Generation	8	1	0	18	9	5	9	0
Cold Water Storage & Distribution System	4	1	0	16	9	3	16	0
Direct Expansion Air Conditioning Systems	4	1	0	0	3	3	0	0
LTHW Generation & Distribution	11	3	0	4	12	3	5	0

4 items in 1 page 10 Refresh

Documents by Popularity

Document Title	Ref Drawing Number	Hit Count
Chilled Water Generation		48
19Xb Positive Pressure Pumpout Unit Wiring Diagram	WE03882-As Built	24
Grundfos Cws Booster Set Installation And Operation Instructions		13
19Xb Positive Pressure Storage System Pump out Unit Installation, Operation and Maintenance Product Data		13
19W-70-70 Dimensioned Drawing Sheet 1/5	WE03646-As Built	11
Vermont House Health and Safety File		10
Cold Water Storage and Distribution System		9
19Xb Positive Pressure Storage With Mounted Pumpout Unit	WE03861-As Built	8
Cw And Lthw Water Treatment Equipment Service Report		7
Belmont Cold Water Storage Tank Europeage Instructions		5

100 items in 10 pages 10 Refresh

Documents by Ranking

Document Title	Ref Drawing Number
19Xb Positive Pressure Pumpout Unit Wiring Diagram	WE03982-As Built
19Xb Positive Pressure Storage System Pump out Unit Installation, Operation and Maintenance Product Data	WE03961-As Built
19Xb Positive Pressure Storage With Mounted Pumpout Unit	WE03646-As Built
19Xr 70-70 Dimensioned Drawing Sheet 1/5	WE03647-As Built
19Xr 70-70 Dimensioned Drawing Sheet 2/5	WE03648-As Built
19Xr 70-70 Dimensioned Drawing Sheet 3/5	WE03649-As Built
19Xr 70-70 Dimensioned Drawing Sheet 4/5	WE03650-As Built
19Xr 70-70 Dimensioned Drawing Sheet 5/5	
19Xr Hermetic Centrifugal Liquid Chillers Installation, Operation and Maintenance	
19Xr High Efficiency Hermetic Centrifugal Liquid Chiller Product Data	

100 items in 10 pages 10 Refresh

My Recent Documents

Document Title	Ref Drawing Number	Hit Count
19Xb Positive Pressure Pumpout Unit Wiring Diagram	WE03882-As Built	24
19Xb Positive Pressure Storage System Pump out Unit Installation, Operation and Maintenance Product Data		13
19Xb Positive Pressure Storage With Mounted Pumpout Unit	WE03861-As Built	8
19Xr 70-70 Dimensioned Drawing Sheet 1/5	WE03646-As Built	11
19Xr 70-70 Dimensioned Drawing Sheet 3/5	WE03649-As Built	2
Direct Expansion Air Conditioning Systems		5

6 items in 1 page 10 Refresh

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Search

The **Advanced Search** Features allow access to the Information via the Menus:

1. System Documents (As shown above)

Navigating directly to System Documents allows you to fine tune long lists of documents by filtering based on:

- Discipline
- System
- Document title
- The text within the document

2. Advanced Search Asset

The Advanced Search Asset, allows you to search for information about features of the building, services or elements. You can search for information by one or more fields at once. After entering your search, the resultant table indicates assets that fulfill the search criteria. Clicking on the asset takes you to the System Document Page for the system the asset is a part of.

3. Advanced Search Documents

The Advanced Search - Document page allows us to search using

- who provided the document (pull down)
- the type of document (pull down)
- the title
- text within the document

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My Work Search Reports Project: WCEC : Base Build Contact Us/Help

Advanced Search - Assets **Advanced Search - Documents**

Filter

Group: (None)

Category: (None)

Document title:

Document contents:

Prelisted only

Document Title	Ref Drawing Number	Category Item	
<input type="checkbox"/> 19Xb Positive Pressure Pumpout Unit Wiring Diagram	WE03882-As Built	Drawings	<input type="button" value="Details"/>
<input type="checkbox"/> 19Xb Positive Pressure Storage System Pump out Unit Installation, Operation and Maintenance Product Data		Literature	<input type="button" value="Details"/>
<input type="checkbox"/> 19Xb Positive Pressure Storage With Mounted Pumpout Unit	WE03861-As Built	Drawings	<input type="button" value="Details"/>
<input type="checkbox"/> 19Xr 70-70 Dimensioned Drawing Sheet 1/5	WE03646-As Built	Drawings	<input type="button" value="Details"/>
<input type="checkbox"/> 19Xr 70-70 Dimensioned Drawing Sheet 2/5	WE03647-As Built	Drawings	<input type="button" value="Details"/>
<input type="checkbox"/> 19Xr 70-70 Dimensioned Drawing Sheet 3/5	WE03648-As Built	Drawings	<input type="button" value="Details"/>
<input type="checkbox"/> 19Xr 70-70 Dimensioned Drawing Sheet 4/5	WE03649-As Built	Drawings	<input type="button" value="Details"/>
<input type="checkbox"/> 19Xr 70-70 Dimensioned Drawing Sheet 5/5	WE03650-As Built	Drawings	<input type="button" value="Details"/>
<input type="checkbox"/> 19Xr Hermetic Centrifugal Liquid Chillers Installation, Operation and Maintenance		Literature	<input type="button" value="Details"/>
<input type="checkbox"/> 19Xr High Efficiency Hermetic Centrifugal Liquid Chiller Product Data		Literature	<input type="button" value="Details"/>

113 items in 12 pages (1 2 3 4 5 6 7 8 9 10 ... >>) 10 Refresh

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Export

INTELI-SCAN allows the End User to Export or Reuse information:

The EXPORT buttons allow any data on screen to be exported to a MS Excel File for use in any way the user needs to.

The BULK Print button allows the user to assemble for printing a manual about the topic, system or systems selected. The resultant download is provided with a cover sheet and full contents listing specifically generated as a result of the selections made. These contents pages can be used for audit ting and when issuing documents for tender purposes etc.



The downloaded manual content page also provides hyperlinks to the individual documents in the download thereby providing interactivity for disconnected users.

Detailed Reports are Exported to MS Excel for use by all Project Team Members. The Reports page gives access to live detailed Author, Reviewer and Executive reports exported to MS Excel (As shown below) for use by project users indicating:

- Documents counts, (Count of all types of documents received versus those expected for each system)
- System Status
- Asset Counts for each system
- Comments made versus comments responded to by the Author versus Comments Closed (Approved) by the Reviewer

The screenshot displays the IntelI-Scan software interface. At the top, the IntelI-Scan logo is on the left, and user information for Neil Ambler (Change Password | Logout) is on the right. Below the logo is a navigation menu with options: My Work, Search, Reports, Administration, Project Setup, Project: The Emerald Site - Upgrade Works 2009, and Contact Us. Underneath the menu are links for Executive Summary, Author Progress, and Reviewer Progress. A section titled 'Options' lists Executive Summary, Author Progress, and Reviewer Progress. At the bottom of the interface, a copyright notice reads 'Copyright © Watson & Sola 2003-2011, version 5.0.50725.1791' and a tagline 'Intelligent record documentation for buildings'.

The main content area shows a report titled 'Author Progress Report' for 'Upgrade Works 2009'. The report is presented as a table with the following columns: System, Asset Types (BMS, Shering, Lincator, Site Info, Test, Data, CAD), Current Status, Issues for Review, Comments Returned by Author, Comments Made by Author, Issues for Approval, Comments Closed by Reviewer, Issues for Final Approval, and Final Approval. The table contains data for three systems: 'Control/Alarm Generation', 'Alarm Generation & Distribution', and 'Monitor and Scribe'. Each system row shows counts for various asset types and the status of comments and approvals.

Updates

INTELI-SCAN is designed to allow for future updates with the use of Projects and Document Versions:

As can be seen below the LTHW system document was initially written on the Base Build Project and then modified at the Upgrade Works Project.

This two fold approach allows the end user to view the latest version of the manual at all times and for project users to be able to access their version of the document if needed.

The screenshot displays the IntelI-Scan web application interface. At the top, the IntelI-Scan logo is on the left, and user information 'Charlotte Thorpe-Stanley' with 'Change Password | Logout' links is on the right. A navigation bar includes 'My Work', 'Search', 'Reports', 'Project: WCEC : Base Build', and 'Contact Us/Help'. Below this, a secondary navigation bar shows 'Draft Documents', 'Correspondence', 'Pending Correspondence', and 'Workflow'.

The main content area is titled 'Details' and shows the following information:

- Title:** Chilled Water Generation
- Original filename:** CLG-01.DOC
- Projects:** Base Build Upgrade Works 2011
- Systems:** Chilled Water Generation
- Category:** System
- Originator Group:** Carrier Migration Author Carrier

Below the details, a 'Preview' section states: 'A preview is not available for this file type. Click the **View Latest** button below to download the file.'

The 'Download' section contains three buttons: 'View Latest', 'Checkout', and 'Undo Checkout'.

A table displays the document version history:

Version Number	Inserted	Original Project Item	
0	09/Nov/2010 11:36:44	Base Build	View
1	09/Nov/2010 11:38:55	Upgrade Works 2011	View

Below the table, it indicates '2 items in 1 page' with navigation arrows and a 'Refresh' button.

The 'Audit' section shows a table of user actions:

Date Time	User Item	Action
23/Sep/2011 14:05:04	Neil Ambler	CheckedOut
23/Sep/2011 14:05:06	Neil Ambler	CheckoutUndone

Similar to the version table, it shows '2 items in 1 page' with navigation arrows and a 'Refresh' button.

At the bottom of the page, a footer contains the copyright notice: 'Copyright © Watson & Sole 2003-2011, version 5.2.51206.1725' and the tagline 'intelligent record documentation for buildings'.



My Work

The **My Work** Page:

- Indicates the progress of any work the logged on user is responsible for, whether they be a Project Manager, Author or Reviewer.
- The System list tells the user the current status of their Systems and who is to do the next task on that System Documentation, (Pencil= Author, Hard Hat=Project Manager and Clip Board = Reviewer)



- The System Status Chart gives a ready indication of relative progress
- User Progress Bar charts measure the % of deliverables completed
- Access to the contact details and correspondence tools for all team members with responsibilities for the O&M Process

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My Work Search Reports Administration Project Setup Project: WCEC - Base Build Contact Us/Help

Draft Documents Correspondence Pending Correspondence Workflow

Filter by group: (None) Filter by system: (None) Reset

System Name	System Code	Base Build	
Blockwork Walls	BLOCK-01	Approved	Draft Documents
Building Management System	BMS-01	In Progress	Draft Documents
Ceilings	CEIL-01	Approved	Draft Documents
Chilled Water Generation	CLG-01	Approved	Draft Documents
Cold Water Storage & Distribution System	CWS-01	Approved	Draft Documents
Direct Expansion Air Conditioning Systems	AC-01	Approved	Draft Documents
Drylining	WALL-01	Approved	Draft Documents
General & Emergency Lighting & Controls	LTG-01	Issued For Approval	Draft Documents
Health & Safety File	HSF-01	In Progress	Draft Documents
Inergen Fire Extinguishing System	FIRE-03	In Progress	Draft Documents

18 items in 2 pages (1-18) 10 Refresh

System Status

System Status	Count
Not Started	1
Finalised	0
In Progress	6
Draft	0
Issued For Comment	0
Comments Filled	0
Comments Addressed	0
Issued For Approval	3
Comments Closed	8
Approved	0

Colleagues

First Name	Last Name	Phone Number	Mobile Number	Email	Group Item	Role Item	
A Services	Consultant			inteli-scan@watsonsole.co.uk	A Services Consultant	Author	Correspondence
A Structural	Consultant			inteli-scan@watsonsole.co.uk	A Structural Consultant	Author	Correspondence
Allan	Paul			alan.paul@trothschild.co.uk	Site User	Site User	Correspondence
An	Architect			inteli-scan@watsonsole.co.uk	An Architect	Author	Correspondence
Anthony	Lofus			tony.lofus@trothschild.co.uk	Site User	Site User	Correspondence
BDL	Migration Author	12345		admin@inteliscan.co.uk	BDL	Author	Correspondence
BLL	Proxy			inteli-scan@watsonsole.co.uk	BLL	Author	Correspondence
Carrier	Migration Author			inteli-scan@watsonsole.co.uk	Carrier	Author	Correspondence
Charlotte	Thorpe-Stanley			charlotte1@october21.net	Axima	Reviewer	Correspondence
Charlotte	Thorpe-Stanley			charlotte@october21.net	Axima	Author	Correspondence

13 items in 4 pages (1-13) 10 Refresh

User Progress

User Progress	Percentage
Draft	61%
Approved	44%
Issued For Comment	100%
Comments Filled	100%
Comments Addressed	100%
Issued For Approval	86%
Comments Closed	64%

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Fully Configurable

INTELI-SCAN is fully configurable in the Project Set Up Wizard, shown below, enabling:

CREATE PROJECT, (Projects can be set up within a site to cater for Sectional Completions, Refurbishment or Fit Out and Base Build Contracts)

ADD/EDIT SYSTEMS, this gives **INTELI-SCAN** the ability to cater for all groups of documents required by the Client, as shown here the Training Agenda have been added and we now have the page open to add an additional System

ADD/EDIT ASSETS, this allows direct input, bulk import and export features to work with design team data and for on going use by the clients tools.

The **ASSIGN GROUPS** (Contractors and Project Teams), **ASSIGN USERS**, and **ASSIGN SYSTEMS** tabs allow allocation of duties relating to each System to individual team members.

Intel-Scan Neil Ambler
Change Password | Logout

My Work Search Reports Administration **Project Setup** Project: The Demo Site : Base Build Contact Us

1. Create Project 2. **Add/Edit Systems** 3. Add/Edit Assets 4. Assign Groups 5. Assign Users 6. Assign Systems Next

Filter

System name
System code
Discipline (None) [v]
 Show current assignments only
Go Reset

<input type="checkbox"/>	System Name	System Code	Discipline Item	Description	Is Special System	
<input checked="" type="checkbox"/>	Inergen Fire Extinguishing System	FIRE-03	Fire Services		No	Edit Delete
<input checked="" type="checkbox"/>	Drylining	WALL-01	Structural, Architectural and Fabric		No	Edit Delete
<input checked="" type="checkbox"/>	Low Voltage Power Distribution	SPLY-01	Electrical		No	Edit Delete
<input checked="" type="checkbox"/>	Chilled Water Generation	CLG-01	Mechanical and Public Health		No	Edit Delete
<input checked="" type="checkbox"/>	General & Emergency Lighting & Controls	LTG-01	Electrical		No	Edit Delete
<input checked="" type="checkbox"/>	Standby Power Generation & Distribution	SPLY-02	Electrical		No	Edit Delete
<input checked="" type="checkbox"/>	Cold Water Storage & Distribution System	CWS-01	Mechanical and Public Health		No	Edit Delete
<input checked="" type="checkbox"/>	Blockwork Walls	BLOCK-01	Structural, Architectural and Fabric		No	Edit Delete
<input checked="" type="checkbox"/>	Training Agenda	TA-01	Training		No	Edit Delete
<input type="checkbox"/>			(None) [v]		<input type="checkbox"/>	Update Cancel

20 items in 2 pages (12) 10 Refresh

Add

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Control

INTELI-SCAN has the feature to allow prelisting of documents associated with a system as shown below. If you view setting up Systems as defining the scope of the O&M manuals the prelisting feature is used to develop the detail required.

This page also indicates the ability of **INTELI-SCAN** to control:

- Workflow and Status
- Bulk Print
- Checkout and Revise documents
- Upload Documents (Using a simple drag and drop facility)
- Make and View Comments Online
- Export Document and Data Schedules

The screenshot displays the IntelScan web application interface. At the top, the IntelScan logo is on the left, and the user name 'Neil Ambler' with 'Change Password | Logout' links is on the right. Below the header is a navigation menu with tabs for 'My Work', 'Search', 'Reports', 'Administration', 'Project Setup', and 'Project: Vermont House : May 2011 Test'. A secondary menu shows 'Draft Documents', 'Correspondence', 'Pending Correspondence', and 'Workflow'. A 'Filter' box contains dropdown menus for 'Discipline' (set to '(None)') and 'System' (set to 'Another Notional System for Test'), along with text input fields for 'Document title' and 'Document contents', and a 'Prelisted documents only' checkbox. Below the filter is a table with columns: 'Assets', 'Systems', 'CAD', 'BMS', 'Drawings', 'Literature', 'Site Info', and 'Test Data'. The table contains one row with 'Document Title' 'Axima PT3RDS [p]', 'Ref Drawing Number' empty, and 'May 2011 Test' in the 'Drawings' column. A yellow 'Prelisted' tag is next to the 'May 2011 Test' entry. Action buttons 'Edit', 'Details', and 'Comments [0 pending, 0 open]' are visible. Below the table are 'Actions' buttons: 'Bulk Print', 'Checkout', 'Upload Documents', 'System Comments: 0 pending, 0 open', and 'Export'. There is also a 'Change category: (None)' dropdown and a 'Change Category' button. A 'Workflow' section has a 'Force Status' dropdown set to 'In Progress' and a 'Force Status' button. The footer contains 'Copyright © Watson & Sole 2003-2011, version 5.0.50706.1618' and 'Intelligent record documentation for buildings'.



Completion

Finally for the Principal Contractor **INTELI-SCAN** is designed to ensure the Completion of the O&M Project.

With the System by System design of **INTELI-SCAN** the benefit of being able to progress authoring and reviewing work on a piecemeal basis drafting and completing sections as and when the information is available ensures that the most effective and efficient O&M production process is enabled.

Throughout **INTELI-SCAN** the software allows contributors to work on or offline. (For example comments can be made directly into the software, on a preformatted MS Excel Spreadsheet for import or on the design teams' own specific comment sheets that is attached.)

Furthermore all project correspondence is recorded in **INTELI-SCAN** to allow the Principal Contractor the ability to monitor the response of all users to requests from **INTELI-SCAN**.



Further Information

For a demo of **INTELI-SCAN** or to find out how Watson & Sole can make a tangible difference to your business please give us a call today.

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