PROJECTS

From master document list to project overview

THE MOMENT

Progress meeting tomorrow. The client asks for the document list. Someone spends the evening updating a spreadsheet.

Internal, client and supplier lists per project, every document a placeholder with a status from its workflow, one overview.

THE FLOW

1. **Create the project** — Project manager
2. **Plan in three lists** — Project manager
3. **Reserve with placeholders** — Project manager
4. **Produce** — Engineer
5. **Status from the workflow** — Automatic
6. **Follow up** — Project manager

Blueprint BP-29	
SECTOR	Engineering
PROCESS	Projects
STARTS WITH	New project
RESULT	Project overview
BUILDING BLOCKS	M-Files · Engineering Pack

Audit trail

Recognise this moment?

Tell us about your own process. We look at it with you, without obligation.

DISCUSS THIS PROCESS
softadvice.eu
/plan-a-call

READ THE FULL BLUEPRINT
softadvice.eu
/in-practice/engineering-master-document-list