



CUSTOMER STORY



With a goal of moving from an inefficient legacy system for its annual capital project management process to a multi-year approach that normalizes activities and budgets, **San Diego Gas & Electric (SDG&E)** transitioned from a collection of project management, work order, and financial software with limited data-sharing capabilities to a centralized, highly integrated IT platform featuring Archibus at its center.

Facilities facts

4,100

Sq. mile service territory

2M

Sq. feet of facilities



Archibus
by eptura

Customer profile

The capital project challenge for an organization as large as SDG&E, with its diverse facility types, is considerable given its more than 2 million square feet of office buildings, operating bases, substations, and payment centers. Upgrading the existing system to manage that function required a plan equally large to connect its multiple platforms and make them work as one.

Archibus solutions

- ✓ Capital project management
- ✓ Space management
- ✓ Move management
- ✓ Lease administration
- ✓ Energy management
- ✓ Asset management
- ✓ Portfolio planning & forecasting
- ✓ Emergency preparedness

Reasons for implementing



Inefficient system created need for a replacement that could integrate capital project management processes with real estate/facilities management tasks/data

Maximo maintenance information

SAP/financials

Benefits gained



In 5 years, annual budget for capital projects was increased from \$5-7M to over \$40M



Improved data, processes, and reporting for capital project management



Enhanced cost/accounting control

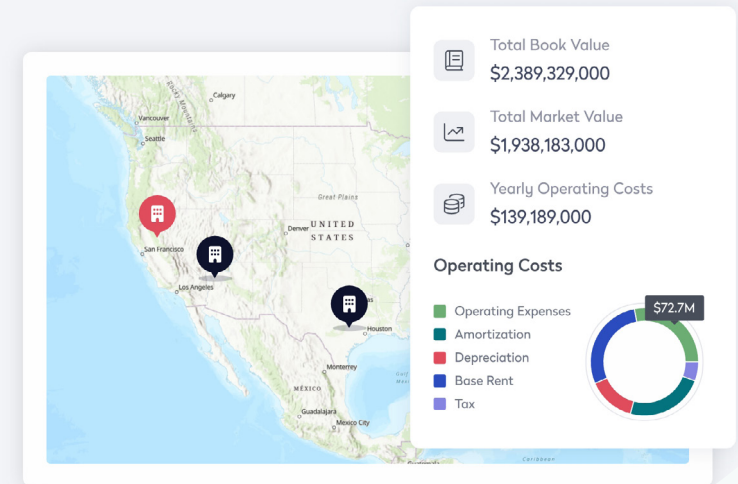


Normalized long-range project planning and budgeting

Indispensable planning

With the legacy project management system in place, along with Microsoft Project, Archibus applications, Maximo for processing work orders, and SAP handling the company's financials, SDG&E created a 9-month, three-phase implementation plan to improve its capital project process.

That plan would phase out the legacy system, which couldn't easily perform automated, bi-directional data interchanges with other systems. Microsoft Project was eliminated and its basic functionality duplicated and enhanced through the customization of the Archibus Project Management application. It would also integrate space and preventive maintenance data and processes. Ultimately, the SDG&E team would link all that information with SAP financials to track actual costs per project.



“ Dwight Eisenhower once said that ‘In preparing for battle, I have always found that plans are useless but planning is indispensable. I think there is something to that statement; by the time a plan gets to a piece of paper it seems like you’re on to the next thing or process.”

Dave Carew,
Real Estate Resources Manager, SDG&E



“ We had a project management spreadsheet that had 220 columns for each row; each row represented a project, and we had over a thousand rows (project requests) each year. And the formulas — you needed to be a rocket scientist to figure out what cells were calculating off which formulas at any given time. We had implemented Archibus in the other areas of facilities and real estate management — lease administration, MAC and space planning — so we thought that we needed to **revitalize** our project management system and tie it all back into Archibus as the **central** point of information exchange. ”

Dave Carew,
Real Estate Resources Manager, SDG&E

Enhance capabilities

Organizational transformation

In order to create the new project management platform, the SDG&E plan included gap analysis, process reengineering, data mapping/normalization, establishment of background data/standards, definition of workflow rules, design of feature enhancements, and concluding with training and system roll out.

The functionality goals were equally specific and covered the management of project requests, workflow approvals, cash flow and budget tracking, schedules/milestones, project close-out and last, but not least, document management.

Just as important, a more transparent, integrated project management system meant that projects could be kept on track more easily to avoid the hockey-stick effect at the end of the year when budgets have to be spent (or forfeited) in the final months of the year. The new system, in contrast, aided the organization in pursuing multi-year project cycles to keep those projects moving forward.



We used Archibus Business Partner FMP, Inc., to help us come up with the most **integrated** and **economical** solution. So we used all the parameters we had identified to design the new system, which also added Archibus Capital Budgeting and Project Management applications. And as we continued, the ability to report on accurate project details gave management greater confidence in the group's ability to manage more money.



Dave Carew,
Real Estate Resources Manager, SDG&E



\$5-7M

previous annual budget



\$40M

annual budget increase
over the last five years



So today, we now have anywhere from \$10 million to \$15 million in projects that we will have in motion from year to year. And the execs have also transitioned from thinking of projects in one-year cycles to now being able to think of **ongoing** project activities in three-year increments for more normalized, long-range **planning** and budgeting.



Dave Carew,
Real Estate Resources Manager, SDG&E

About Archibus

Archibus[®]
by eptura[™]

Archibus by Eptura is the leading Integrated Workplace Management System for managing facilities, infrastructure, and real estate. For more than 40 years organizations have deployed Archibus to gain full built environment insights that allow them to reduce costs, optimize operations and elevate employee experiences.

To experience the power of Archibus solutions firsthand

[Request a demo](#)

work your world[™]

Eptura is a global worktech company that provides software solutions for people, workplaces and assets to enable everyone to reach their full potential. Our scale and expertise helps organizations to engineer a thriving work environment, by giving them the understanding they need to enhance their employee experience, workspaces, and asset value.



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