From Bid to Install and Beyond

About the Project:

West Bank has been a part of the West Des Moines community since the city was founded in 1893. The bank gave the little town the financial boost it needed to grow into the bustling city it is today. Over the years West Bank has grown tremendously with multiple locations throughout Iowa and Minnesota. After being in their old headquarters building since 1972, they decided it was time to upgrade and build their own building, with hopes that it would become a staple in the community.

Workspace was offered the opportunity to bid on this 4-story building project in April of 2023. Right from the start, CET helped us win the business and that is where this Success Story begins.

HGA / West Bank

Location: Lower Level Café
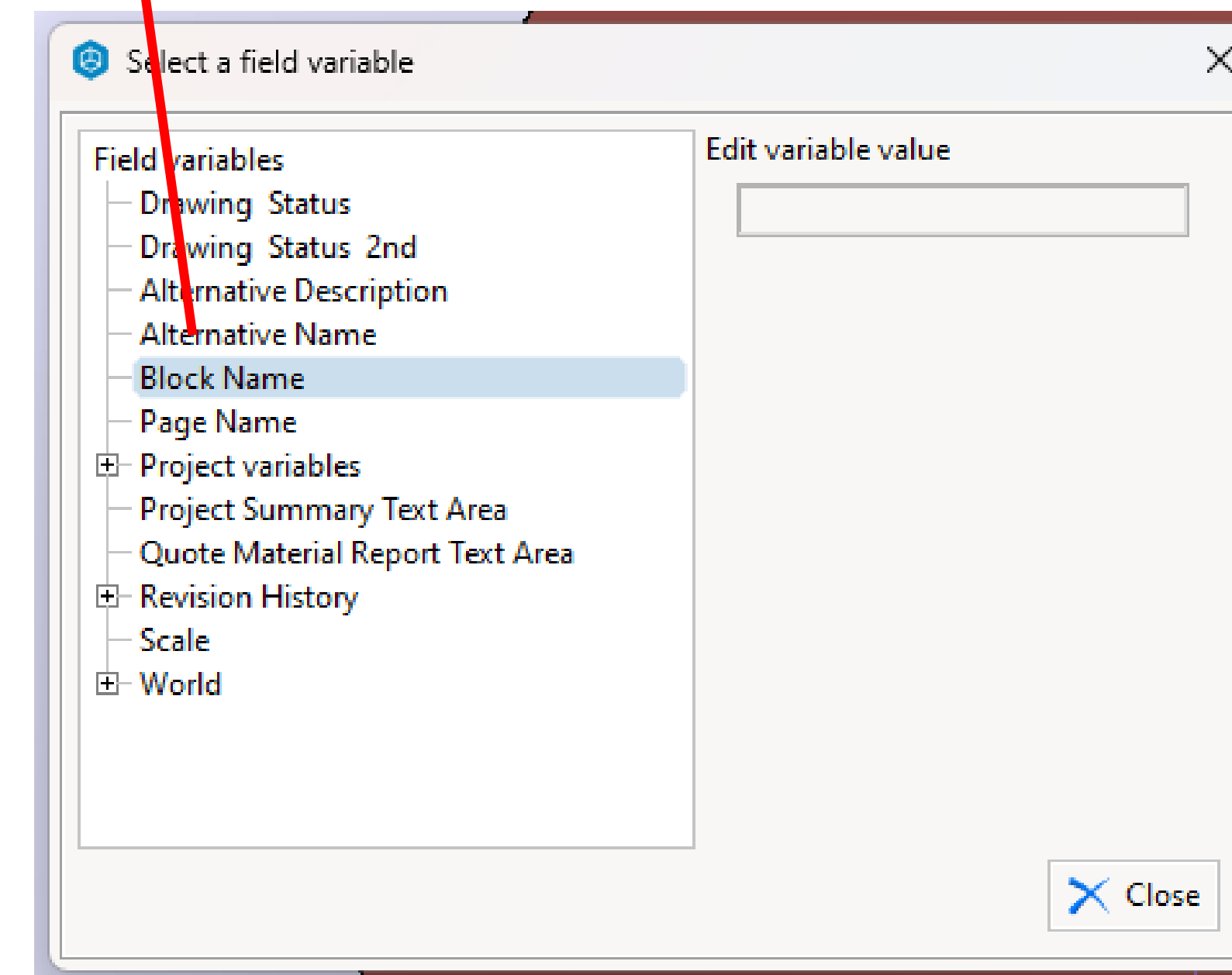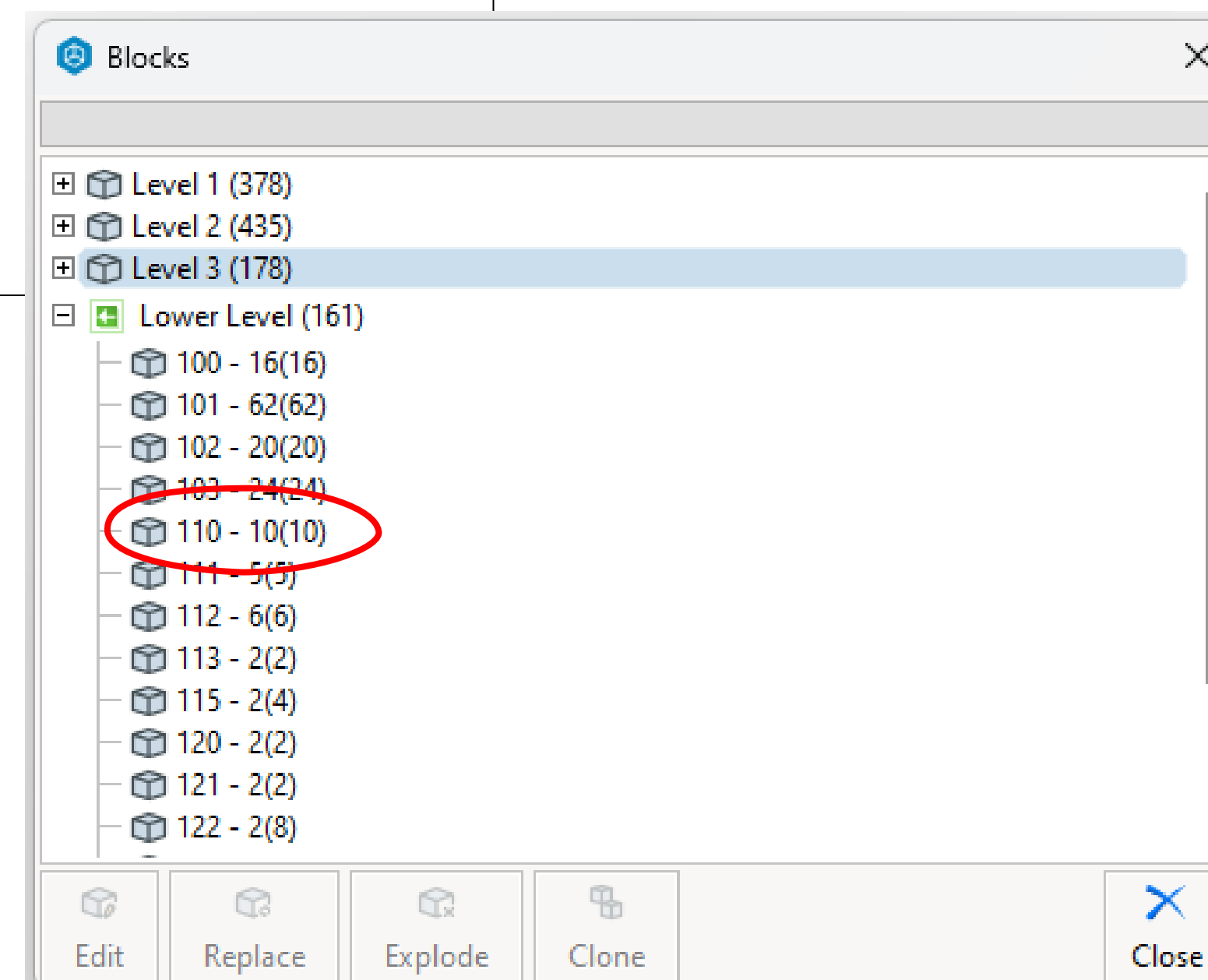**Quantity:** 10
Company: Davis Furniture
Product: Riza
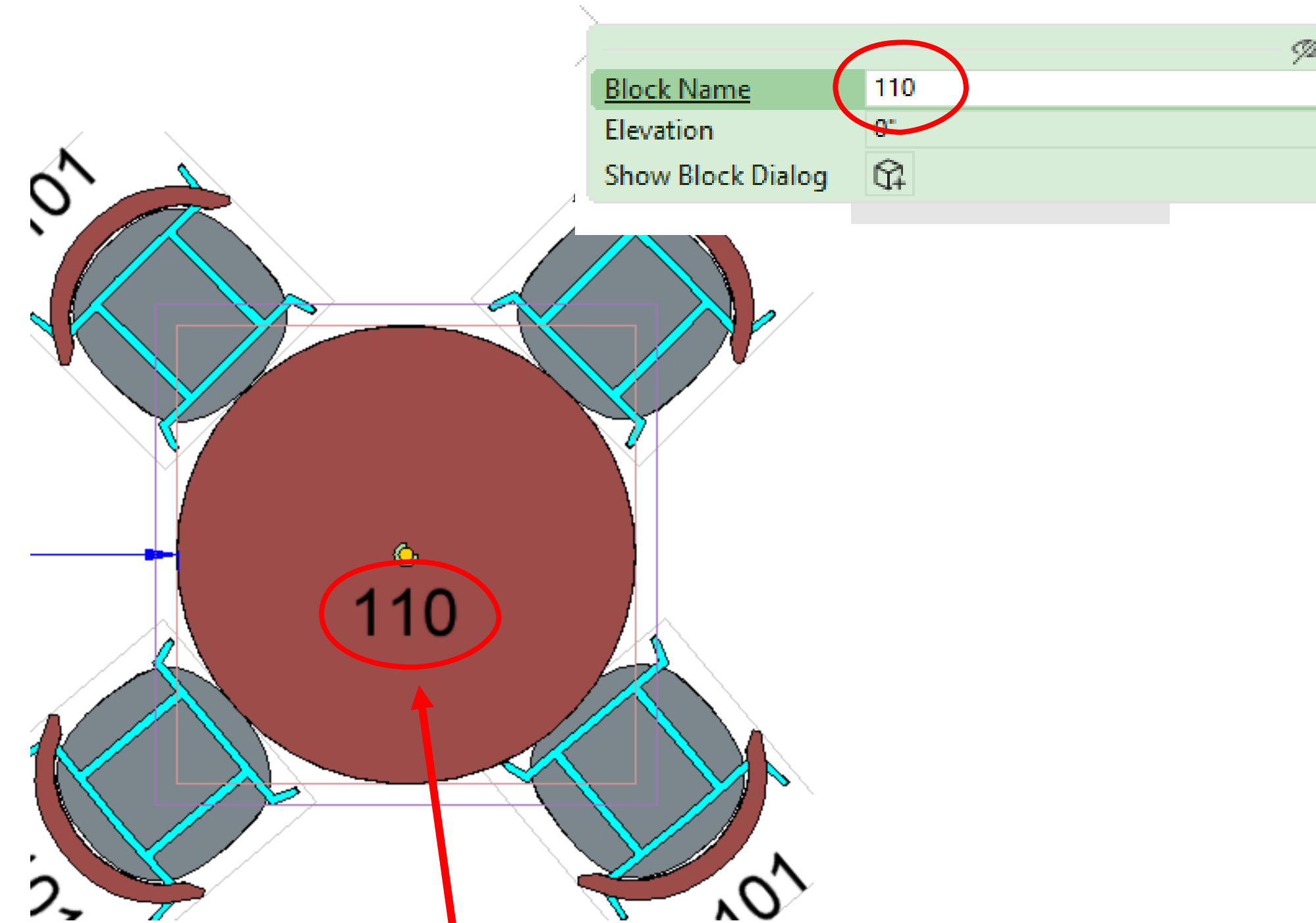
110

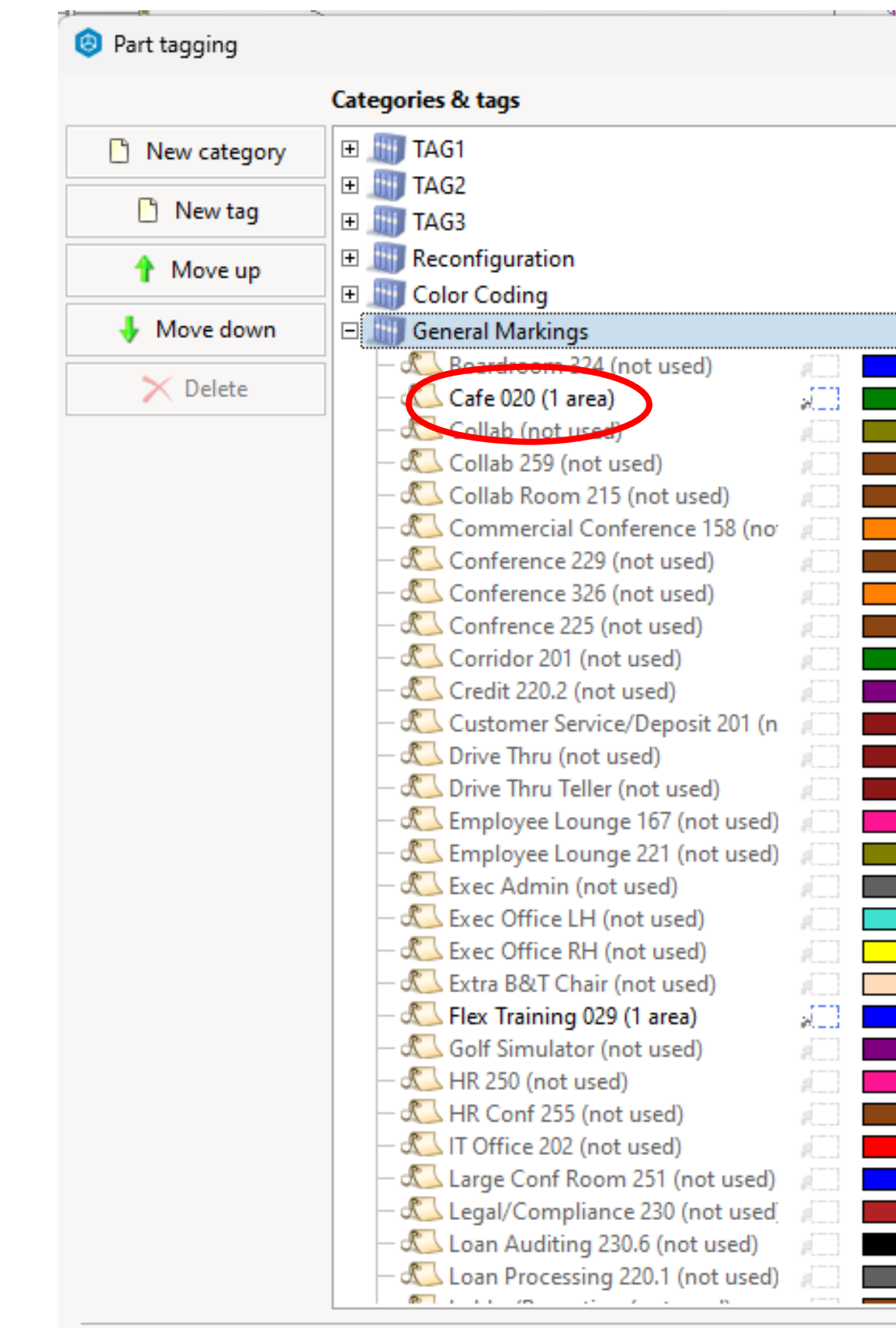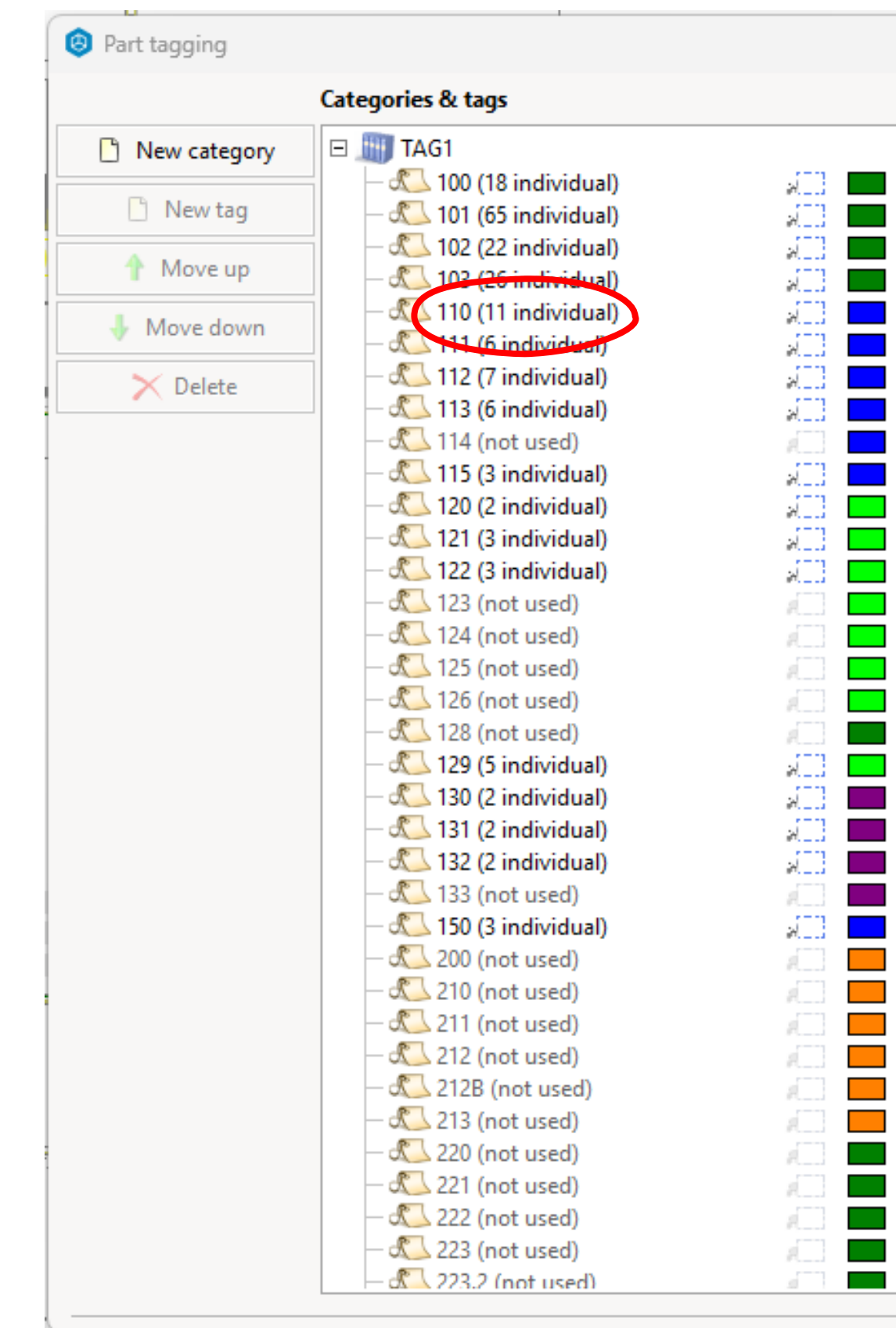https://www.davisfurniture.com/search?query=riza

Design Specifications
Product Options
Model Number: RZ-1042-WW
Base: Tapered Tubular Steel
Base Finish: -05 Matte Black
Top: -WAL; 22 Classic Walnut
Edgeband: Matching Edgeband
Glides: Adjustable Black Plastic Glides
Size: 42"DIA x 29"H

Block Name — 110
Elevation
Show Block Dialog

110

Blocks

- ⊞ Level 1 (378)
- ⊞ Level 2 (435)
- ⊞ Level 3 (178)
- ⊟ Lower Level (161)
  - 100 - 16(16)
  - 101 - 62(62)
  - 102 - 20(20)
  - 103 - 24(24)
  - 110 - 10(10)
  - 111 - 5(5)
  - 112 - 6(6)
  - 113 - 2(2)
  - 115 - 2(4)
  - 120 - 2(2)
  - 121 - 2(2)
  - 122 - 2(8)

Edit | Replace | Explode | Clone | Close

Select a field variable

Field variables
- Drawing Status
- Drawing Status 2nd
- Alternative Description
- Alternative Name
- Block Name
- Page Name
- ⊞ Project variables
- Project Summary Text Area
- Quote Material Report Text Area
- ⊞ Revision History
- Scale
- ⊞ World

Edit variable value

Close

Taking Blocks to a Whole New Level:

We had full intentions of winning this project, so I made sure to set up the drawing in a way that would allow us the best success through all stages of the project. So of course, the first thing I did was create BLOCKS based on the bid package we received from HGA, the A&D firm on the project. Each item in the bid package was assigned a tag number. Following that same idea, I created my own tags in the drawing to match the numbers being used. CET made this super easy! I first created the block and named that block the tag number. For example, the table shown above was named 110. I then used the DATA FIELD TEXT tool to create the tag inside the block. By selecting BLOCK NAME this automatically added text that matched the name I used for the block, which streamlined the process and prevented me having to type out the text a second time. It also sped up the process in creating new blocks. Instead of starting from scratch, I could clone a block, edit the block name, and update the product inside the block. Since the data text was already there and linked to the block name, that was one less step I had to take while creating a new block.

Part tagging (left dialog)

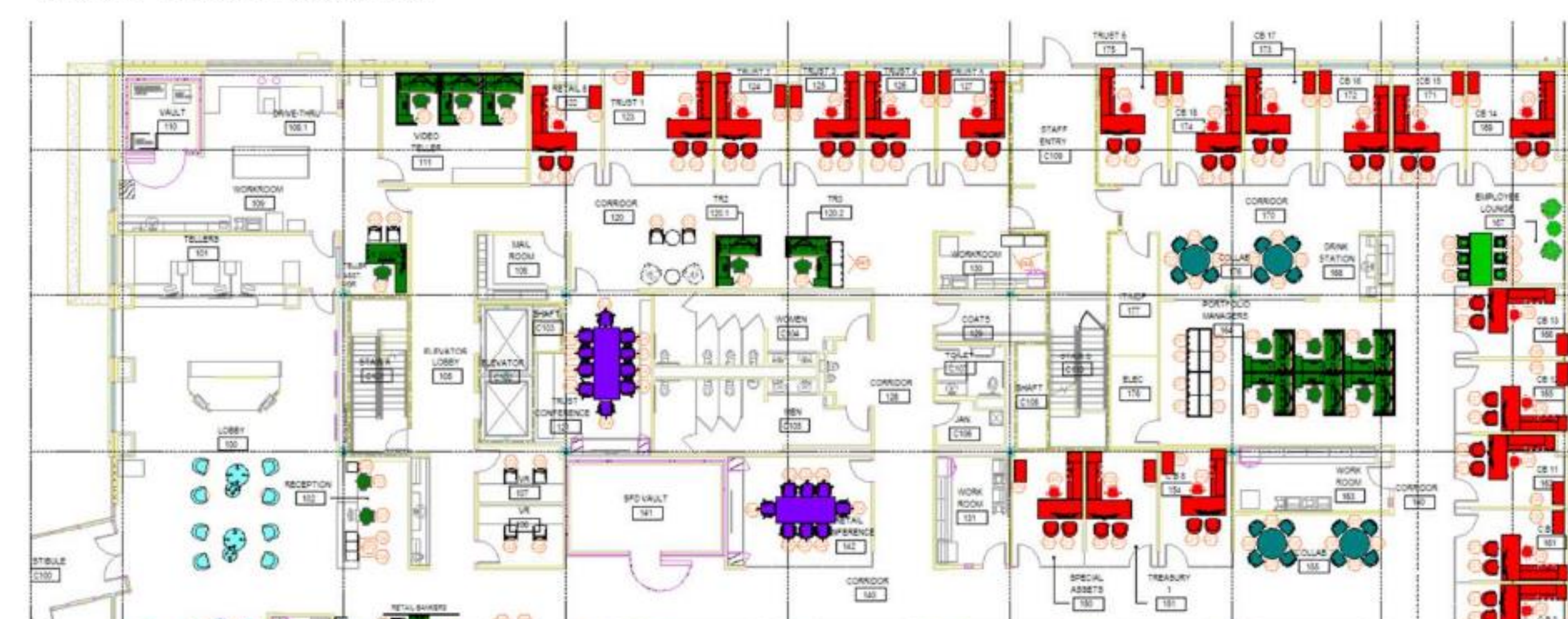New category | New tag | Move up | Move down | Delete

Categories & tags
- ⊟ TAG1
  - 100 (18 individual)
  - 101 (65 individual)
  - 102 (22 individual)
  - 103 (26 individual)
  - 110 (11 individual)
  - 111 (8 individual)
  - 112 (7 individual)
  - 113 (6 individual)
  - 114 (not used)
  - 115 (3 individual)
  - 120 (2 individual)
  - 121 (3 individual)
  - 122 (3 individual)
  - 124 (not used)
  - 126 (not used)
  - 128 (not used)
  - 200 (not used)
  - 210 (not used)
  - 211 (not used)
  - 212 (not used)
  - 212B (not used)
  - 213 (not used)
  - 220 (not used)
  - 221 (not used)
  - 222 (not used)
  - 223.2 (not used)

Part tagging (right dialog)

New category | New tag | Move up | Move down | Delete

Categories & tags
- TAG1
- TAG2
- TAG3
- Reconfiguration
- Color Coding
- ⊟ General Markings
  - Boardroom 504 (not used)
  - Cafe 020 (1 area)
  - Collab 259 (not used)
  - Collab Room 215 (not used)
  - Commercial Conference 158 (no
  - Conference 229 (not used)
  - Conference 326 (not used)
  - Conference 225 (not used)
  - Corridor 201 (not used)
  - Credit 220.2 (not used)
  - Customer Service/Deposit 201 (n
  - Drive Thru (not used)
  - Drive Thru Teller (not used)
  - Employee Lounge 167 (not used)
  - Employee Lounge 221 (not used)
  - Exec Admin (not used)
  - Exec Office LH (not used)
  - Exec Office RH (not used)
  - Extra B&T Chair (not used)
  - Flex Training 029 (1 area)
  - Golf Simulator (not used)
  - HR 250 (not used)
  - HR Conf 255 (not used)
  - IT Office 202 (not used)
  - Large Conf Room 251 (not used)
  - Legal/Compliance 230 (not used)
  - Loan Auditing 220.6 (not used)
  - Loan Processing 220.1 (not used)

Multi-Layer Tagging:

In addition to the block name, I used multiple layers of PART TAGGING to help organize the drawing. After creating the block, I created part tags under TAG1 that matched the block name. I part tagged each block by using the TAG INDIVIDUALLY button prior to duplicating the block. This way, when I copied the block to place in my drawing, it automatically had the part tag applied. Once everything was placed in the drawing, I then applied part tags under the GENERAL MARKINGS category. These tags were named after the areas in the drawing and were placed by using the TAGGING RECTANGLE. Having multiple ways to part tag an item gives me the flexibility to work effectively and efficiently.

Having multiple layers of part tagging came in handy when it came to filling out the bid documents. We were required to provide pricing for individual product, as well as provide subtotals by area. Since product was part tagged by both I was able to group by General Markings and sort by TAG1.

West Bank - Des Moines Headquarters

Interior Furniture RFP Bid Form - Exhibit A

Questions: Christine Lahr, HGA Rochester, MN E-Mail: clahr@hga.com

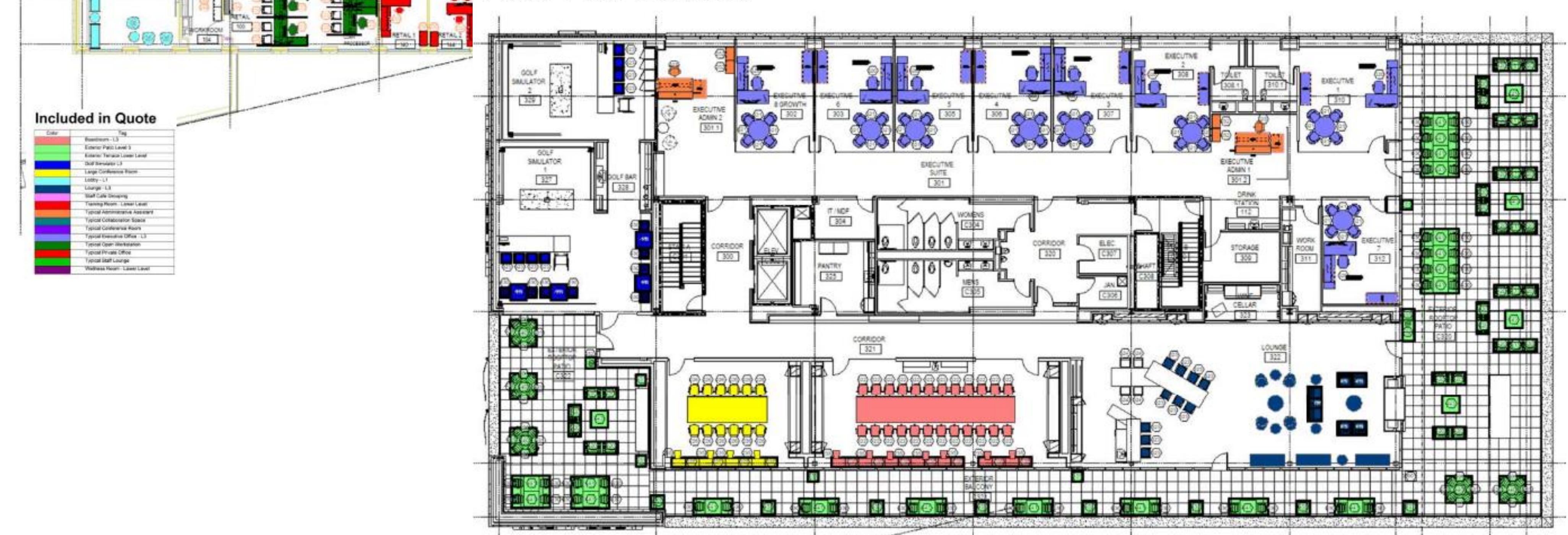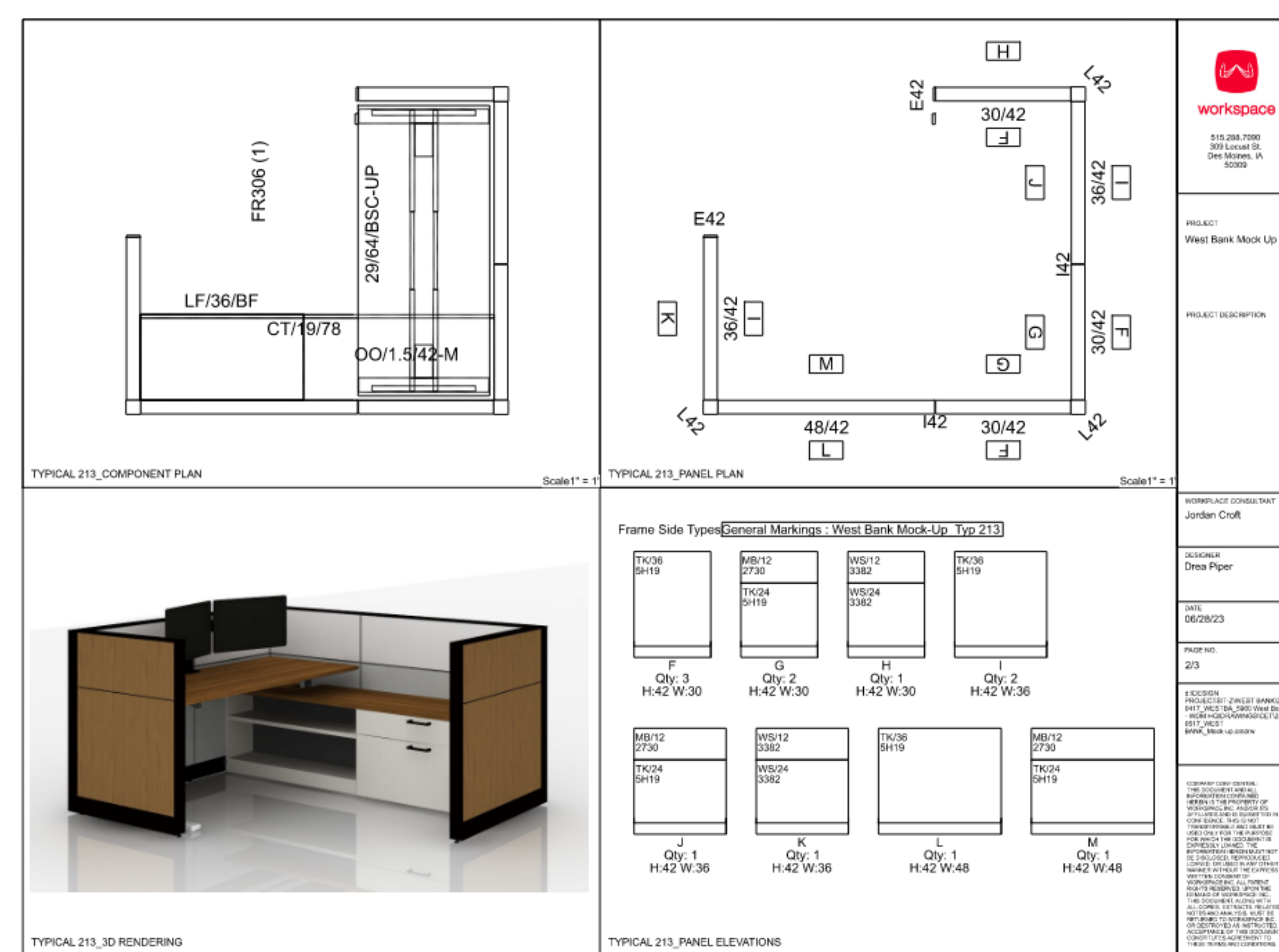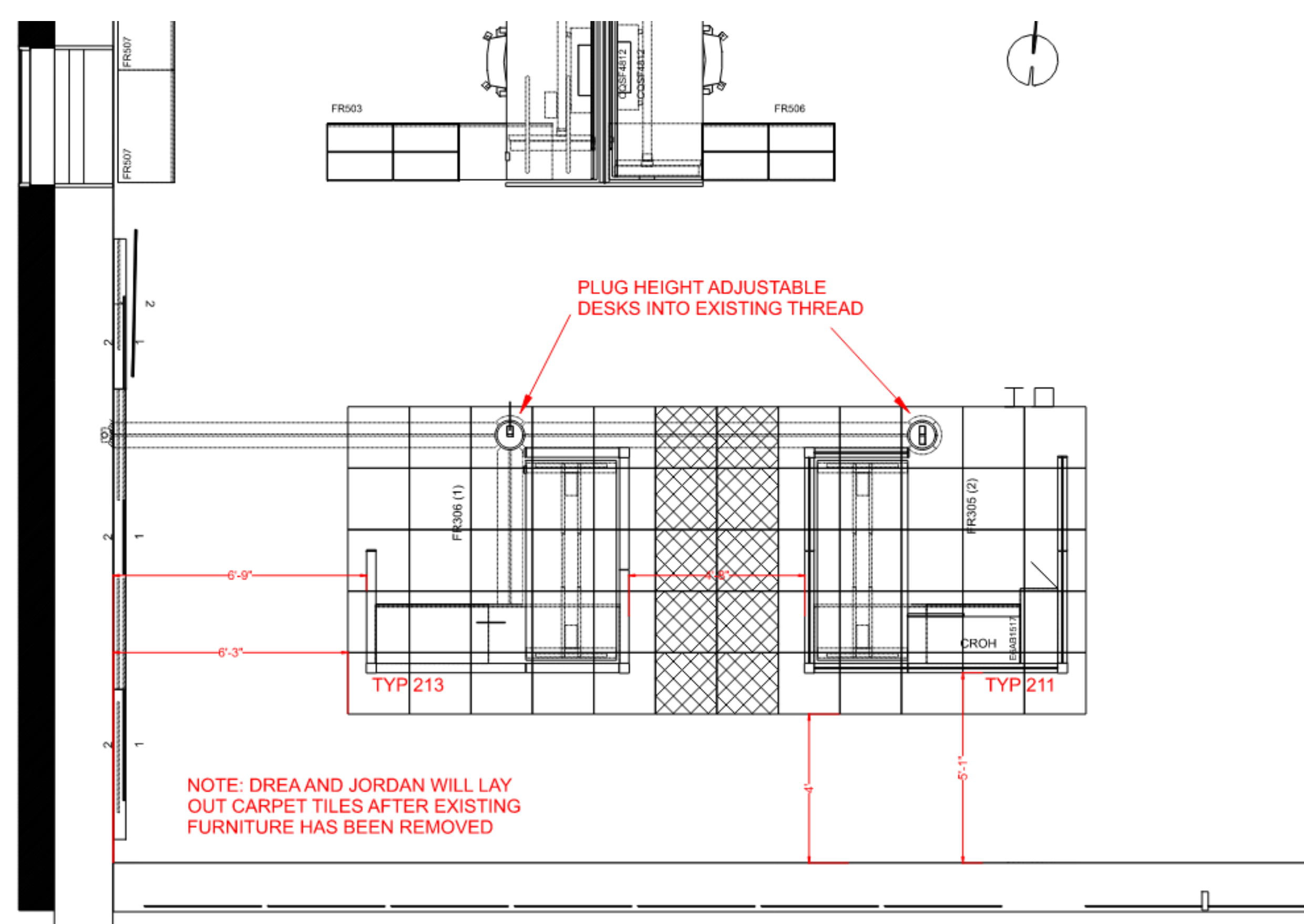| Revisions	Furniture Code	Manufacturer	Upholstery	Description	Unit Price	Quantity	Extended Price
TRAINING ROOM GROUPING- LOWER LEVEL							
	103			Chairs			
	113		NA	Training Tables			
	150		NA	Lectern			
						Total	$
LOBBY GROUPING- LEVEL ONE							
	124			Bench			
	Varies			Lounge Chair			
	133		NA	Occasional Table			
	Varies		NA	Coffee Table			
						Total	$

HGA

Color Coding for the Win:

The SHOW PART TAG COLORS tool proved to be very useful throughout the entire project to successfully communicate to all parties. During the bid process we used color coding to show what was included in our quote and which subsection it was in. It was a great visual and provided clarity which was needed with such a large and complex project.

Floor Plan Level 01

Included in Quote

Floor Plan Level 03

Product Selection:

Although HGA had the furniture well spec'd out in the bid, there was still work to be done with selecting product and finishes. West Bank wanted to sit test all the chairs that were specified as well as any chairs we proposed as alternates in our bid proposal. Additionally, they wanted a mockup of some of the workstation typicals.

We started with the workstation mockups, selecting 2 of the most used typicals. The plan was to show the 2 stations in our showroom where we have a spot dedicated for mockups. I saved the 2 typicals as favorites and inserted them into the CET drawing of our showroom to make sure we had the right space and a spot to plug in. We wanted to give them the full look, so we ordered their carpet to laydown underneath the workstations. I used the 2D DRAWING TOOLS to show where the carpet would lay in relation to the stations.

After we ordered the mockup, I put together some install drawings for our install crew to use. With the BLACK & WHITE FILTER tool I was able to call out important notes and dimensions in red for our team to easily notice.
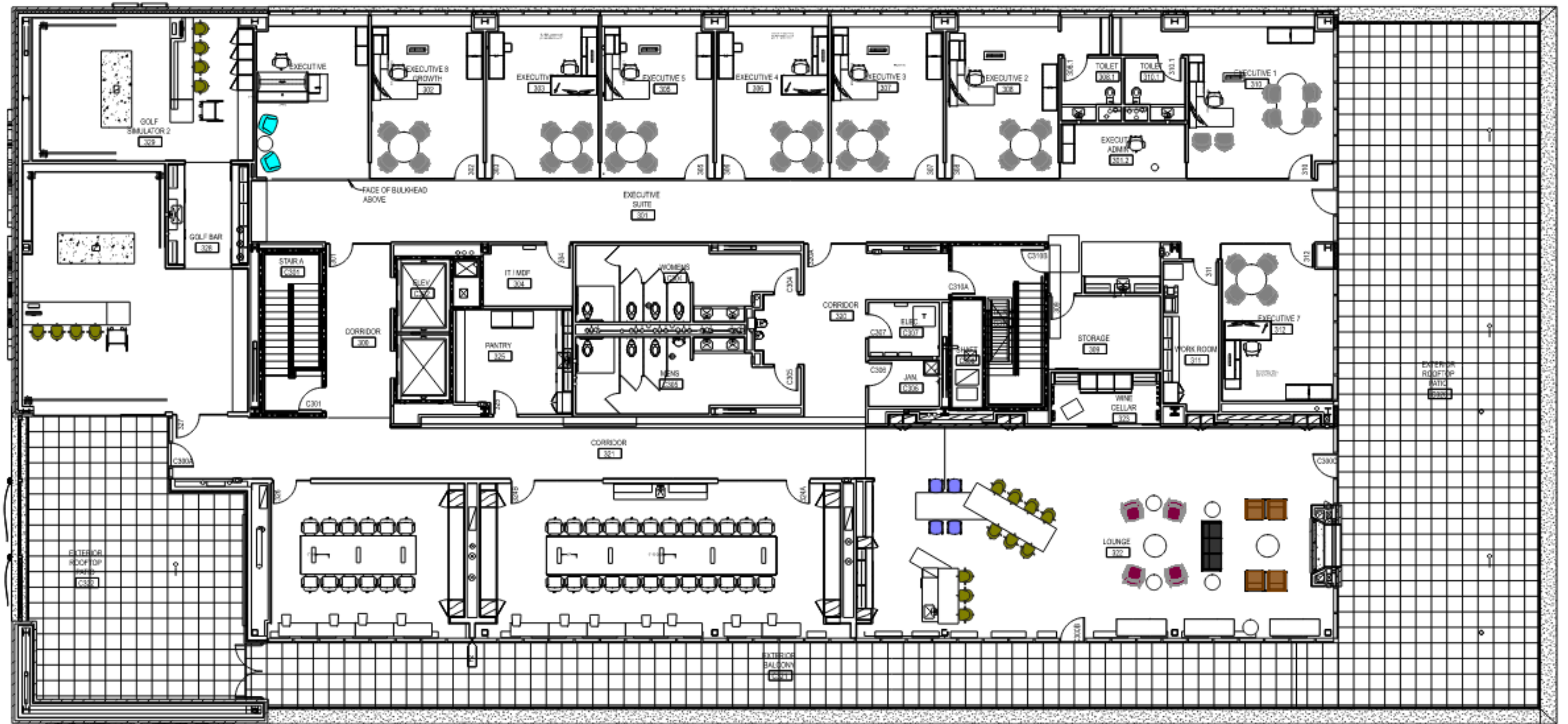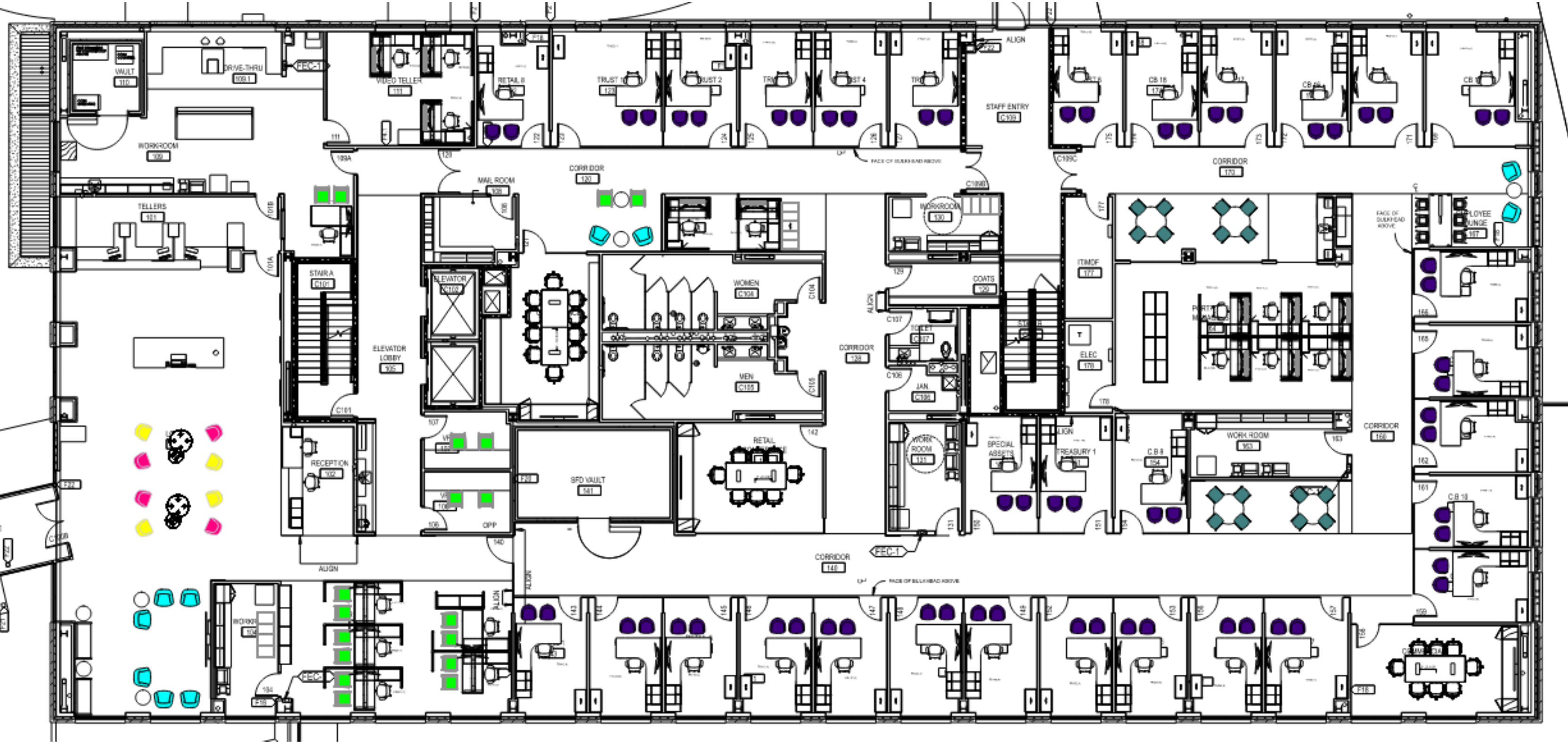
Test Sit:

After the mockup of the workstations, we moved on to test sitting all the chairs. With over 30 different types of chairs throughout the building we needed a way to communicate which chair they were testing out. Enter round two of color coding. Because we had part tagged each block by the item tag in the bidding phase, it made it super easy to create an overall color-coded plan for all the seating. With that, I created simple cut sheets for each chair we were proposing that included a rendering of the chair, the item tag, the floor plan color and the finishes that were specified. We placed each of the cut sheets with their respective chair so when someone went to test it out, they could review it and reference the plan for where that chair was going. It made it easy for them to understand what they were sitting in.

STERLING CHAIR

ITEM TAG: 125
FLOOR PLAN COLOR:

UPH: DESIGNTEX, TWEED MULTI – LIGHT GREY

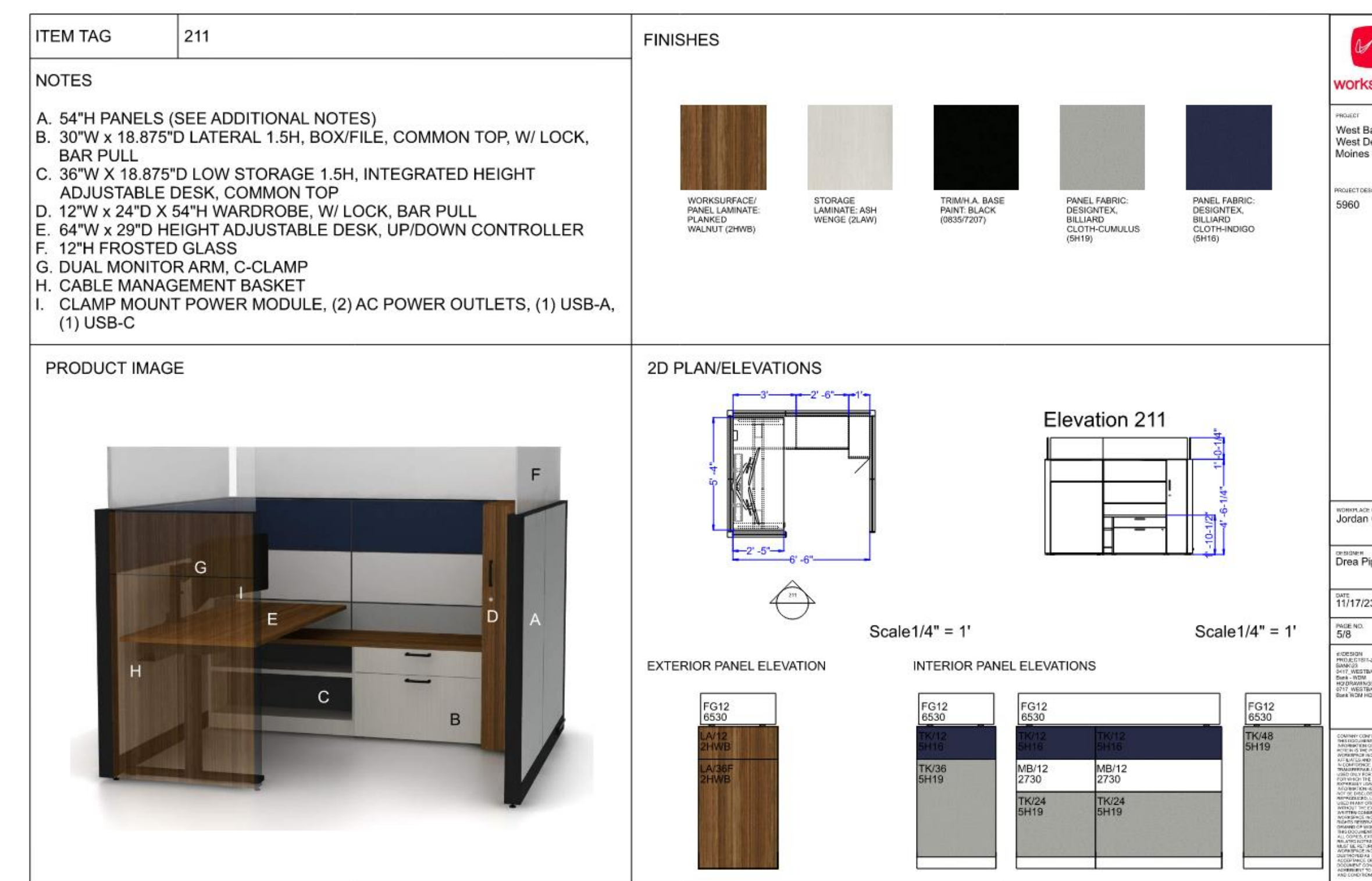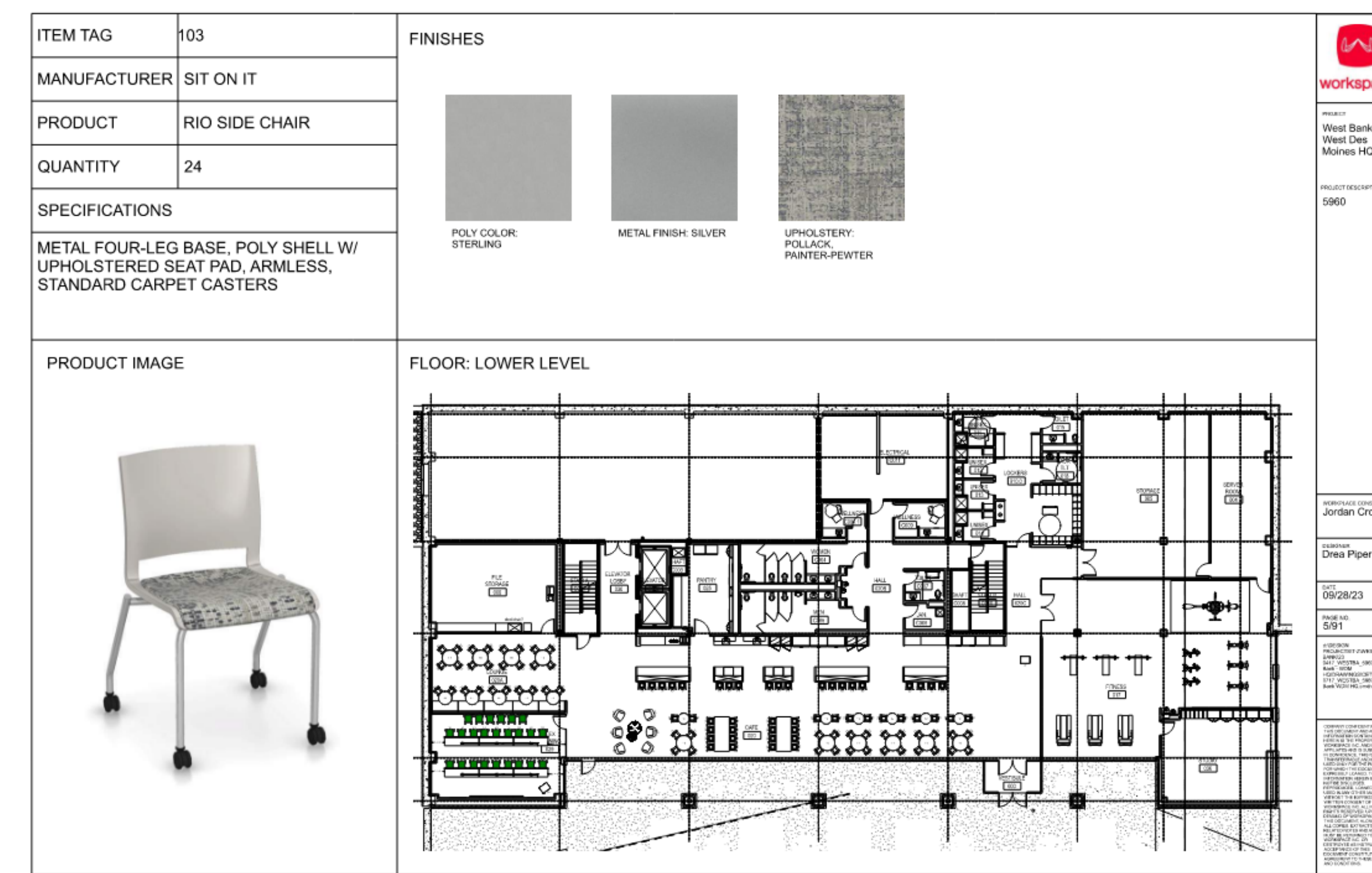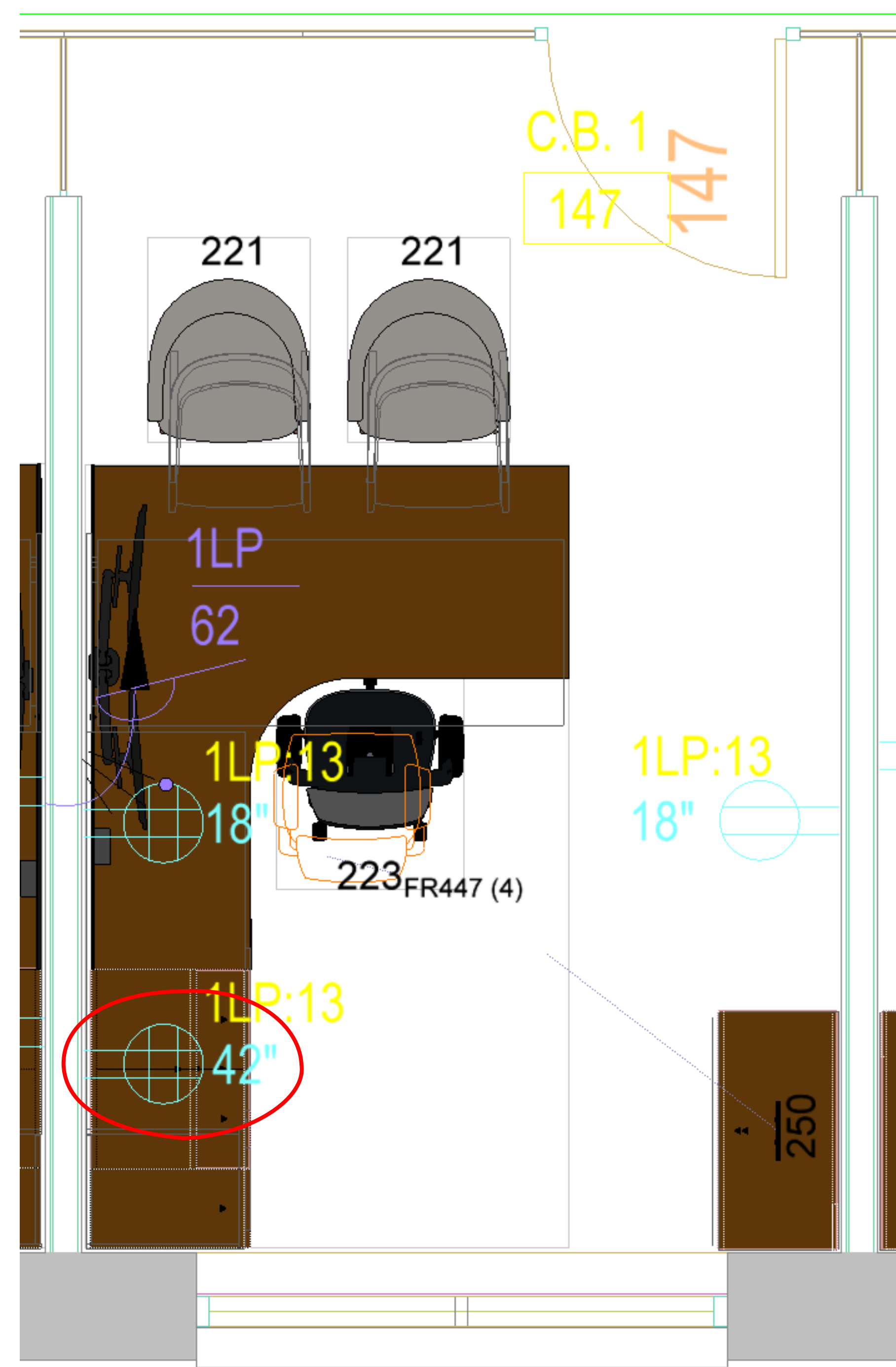UPH: GARRETT LEATHER, NEWPORT CLUB – STARDUST

WOOD FINISH: BLACK OAK

Mockup Review:

The West Bank decision making team consisted of 12 people all of whom were in attendance for the mockup review. We knew it would be a challenge to present to that many people and have meaningful dialog, so we created packets for the West Bank team to make notes on during the presentation and then we came together afterwards to gather everyone's thoughts and feedback. In these packets we included a rendering of each of the 4 typicals. Since we only mocked up 2, we were able to reference the renderings to call out similarities between the workstations, so they had a good idea of what all was included. All renderings included a round section of carpet from the FLOORING tool to help ground the station and relate it back to the physical mockup they were seeing.

Workstation #210

Notes:

Workstation #212

Notes:

Coordination with HGA:

To keep the project running smoothly, we scheduled bi-weekly meetings with HGA. One crucial task we assisted with was making sure electrical was located where it needed to be in order to work with the furniture. Being able to import CAD drawings through CAD SETTINGS is huge when coordinating electrical. I was able to layer it over my drawing to see where issues appeared. One electrical issue we noticed was the use of 42" outlets in the private offices, where we had planned for some shelves. Unfortunately, this placement was communicated too late in the process, and they were already cut and wired at that height. We had to get creative in our solution, which called for a LIVE DESIGN session with HGA.

I hopped on a virtual call with the HGA designers, and I was able to share my screen as we worked through ideas for the private office typical. I was able to show them the capabilities of the product and any ideas thrown out right then and there. We didn't have to send drawings and notes back and forth while trying to come up with a solution, saving time we didn't have to spare. Once we agreed on a solution we all liked, I updated the rendering, and we sent it off to West Bank for final approval.

"Are we able to change the height of the shelf?"

"Would cutting a hole in the back panel interfere with the integrity of the shelf?"

"What if we just removed one of the shelves and left it open?"

Approval Packet:

Before placing the order, I was able to create an approval packet right in CET. In keeping with the theme of item tag, I laid out a page for each item which included product information, quantity, finishes, a rendering, and of course a color-coded plan that showed where the piece of furniture was going. PHOTO LAB came in handy with the number of renderings I had to do. I used PRESETS to set up each rendering and the RENDER MULTIPLE tool to render everything overnight. It was great that I didn't have to babysit the renderings, and I could come back the next morning and make any adjustments as needed. The GHOST tool came in handy for the workstations when I wanted to show details behind panels.

All the details I was able to provide using the various tools in CET helped get a quick sign off and West Bank knew exactly what furniture to expect when they moved into their building.

Order entry:

Similar to when we did pricing for the bid, we organized the Bill of Materials in CALCULATIONS grouping by area which was under the General Markings category and then sorting by item tag which was under the TAG1 category. In doing this, I was able to spec check efficiently since we could move from area to area and even product to product, meaning if a table, for example, was made up of more than one part, it all showed up on the Bill of Materials consecutively. In the event I needed to move the order of one or two lines, I could use the MANUAL MOVE column to do so. For example, our Sales Services team likes to have COM fabric lines after the line of the product it is going on, so being able to manually move the line was crucial when it didn't automatically line up as needed. Another column often used in this project was the COM Info column. I was able to easily and clearly communicate to Sales Services what products would receive a COM, limiting any back-and-forth questions.

Within the Steelcase Extension is a tool called HEDBERG DIRECT LINK. We use Hedberg to place all our orders and this tool makes it easy to send the Bill of Materials to that software with just a click of a button. Additionally, once linked, it shows what the quote number is and there is a column that shows up in calculations that tells you the Hedberg line number for a specific item. It also gives a pop up that tells you if any lines did not link. It takes out the stress of exporting the Bill of Materials as a SIF only to import that somewhere else.
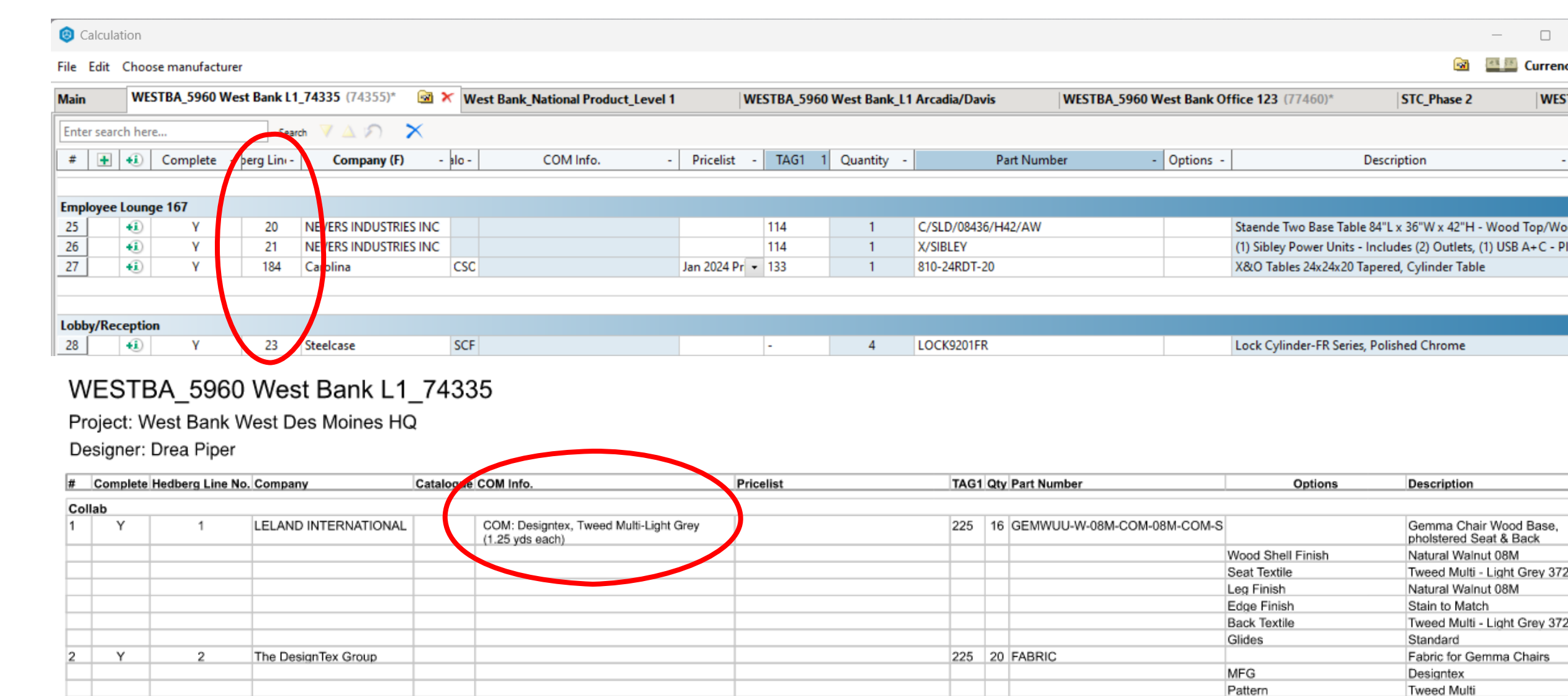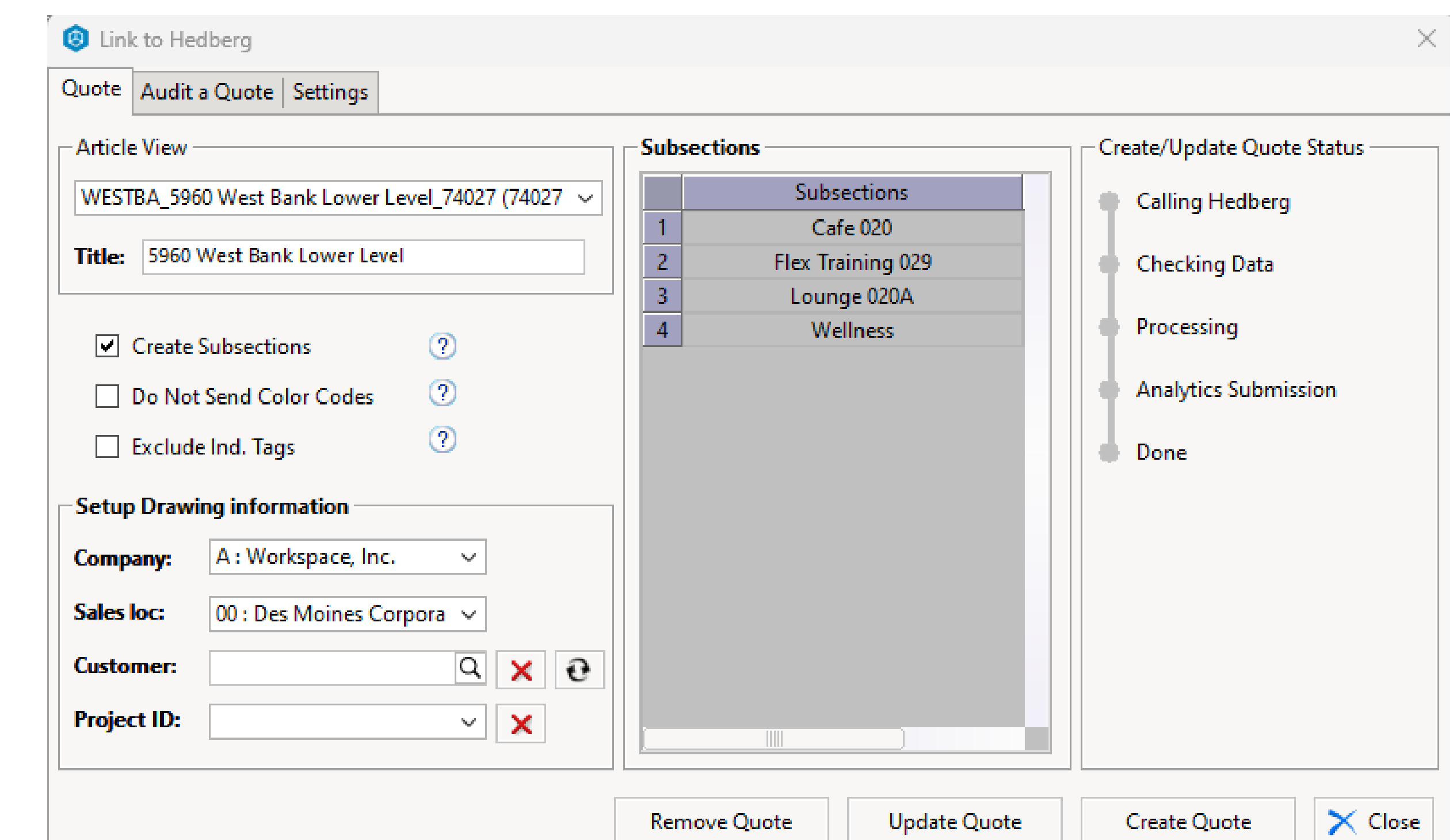
And That's a Wrap!

Crunch Time:

When it came down to the installation of furniture, we were down to the wire to get it done by the time they were scheduled to open to the public. With that said, I needed to create install drawings that were easy to understand and provided all the details they needed to install efficiently.

With the use of some REUSABLE FILES, I was able to create these drawings with ease. I started by loading our company's saved paper which includes data field text boxes in the title block. Some things our title block includes are names and phone numbers for the salesperson, designer, and project manager for the project. To save on time, I have this information saved as a reusable file under PROJECT INFO, so I don't have to spend the time looking up phone numbers every time I work on install drawings. All other information is easy to fill out, such as project name, address, order number(s), etc. Additionally, with the papers being saved with data field text boxes the information will automatically be added on all new papers loaded.

Not only are our papers saved as reusable files, but we have visibility settings saved as well to quickly produce drawings for panel plans and component plans. Only the product and tags that are needed are shown for the crew to easily read the drawings without a bunch of other text or symbols in the way. This helps them speed through the install with ease. By using a key plan, the install team knows exactly where the area is in the building. The Black & White filter allowed me to show the dimension color for easy reference and the SHOW SCALE tool is always helpful incase the crew needs to double check a dimension that isn't shown.

When it came to panel elevations, there were hundreds of panels throughout the building. Because I had part tagging by area, I was able to filter the panel elevations by General Markings, so it only showed the elevations and the quantity they needed for that specific area. Again, this helped speed things up on site, so they didn't have to sort through all the elevations to determine which went in that area. These tools seem so simple, but they make such a huge impact when it comes to saving time both while drawing, and while in the field.
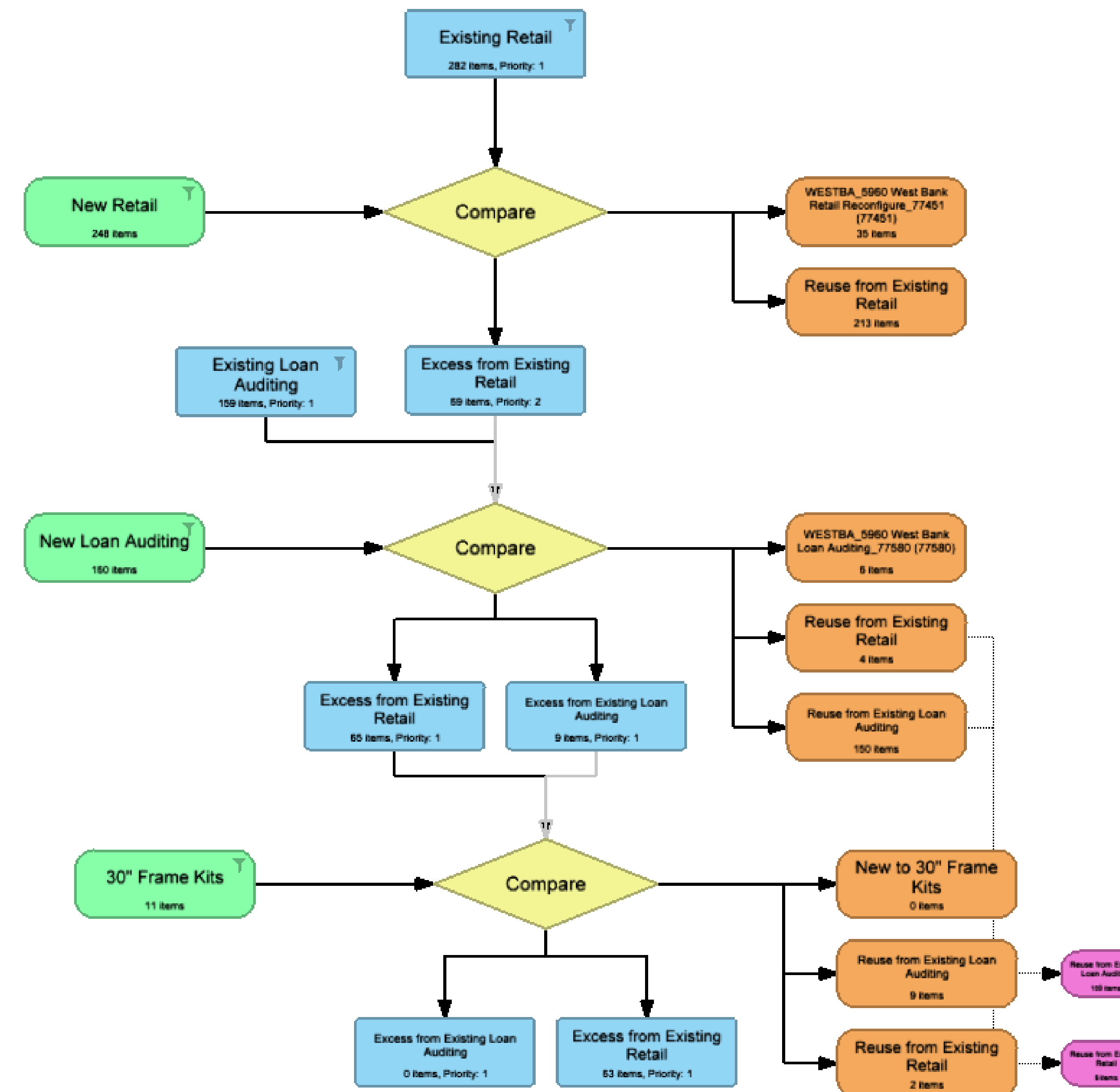
Emergency Reconfigure:

What's a project without at least one hiccup? While our crew was installing the retail workstations, West Bank wasn't happy with how their stations turned out. Our on-site crew was great with producing ideas on the fly and even started building to keep things moving. While they did that, I used the RECONFIGURATION TOOL to determine what parts we would need to order to make the new layout work long term.

After we ironed out the solution for Retail, they decided they wanted to add some more panels to Loan Auditing for more privacy. Since I used the Reconfiguration Tool for the Retail area, I could see we would end up with some leftover panel parts that we could re-use in Loan Auditing. With just a few clicks of a button, I had another Bill of Material for the parts we would need to order and the parts we could re-use.

Once again, I was able to Direct Link to our order entry system straight from the Reconfiguration Tool. However, the work didn't stop there. Lastly, I had to create one more set of install drawings for our crew to go back out and install the new parts. I used the Black & White Filter tool again to call out special notes about where the new product needed to go. I was also able to filter out the panel elevations that were relevant to the install by using part tagging.
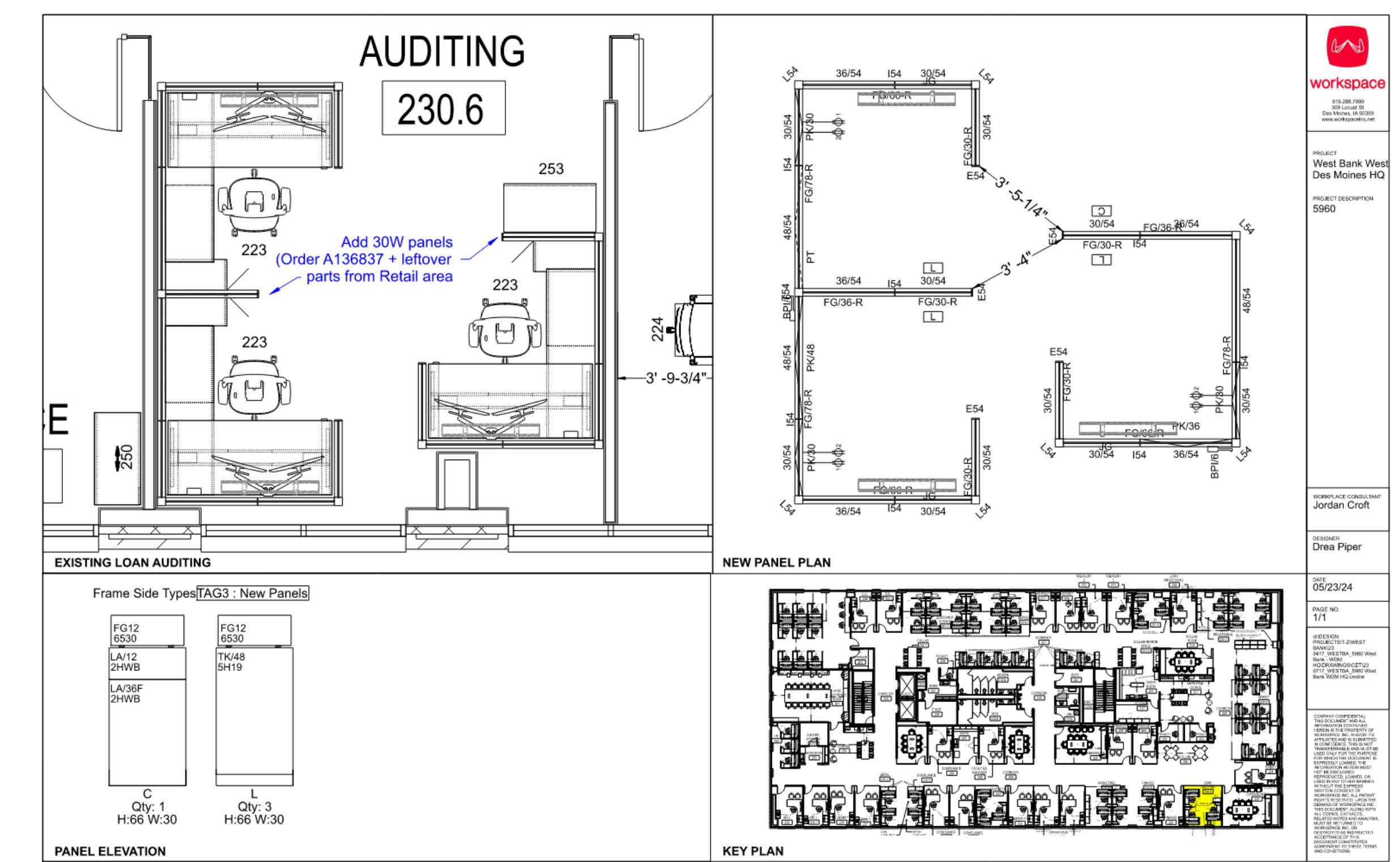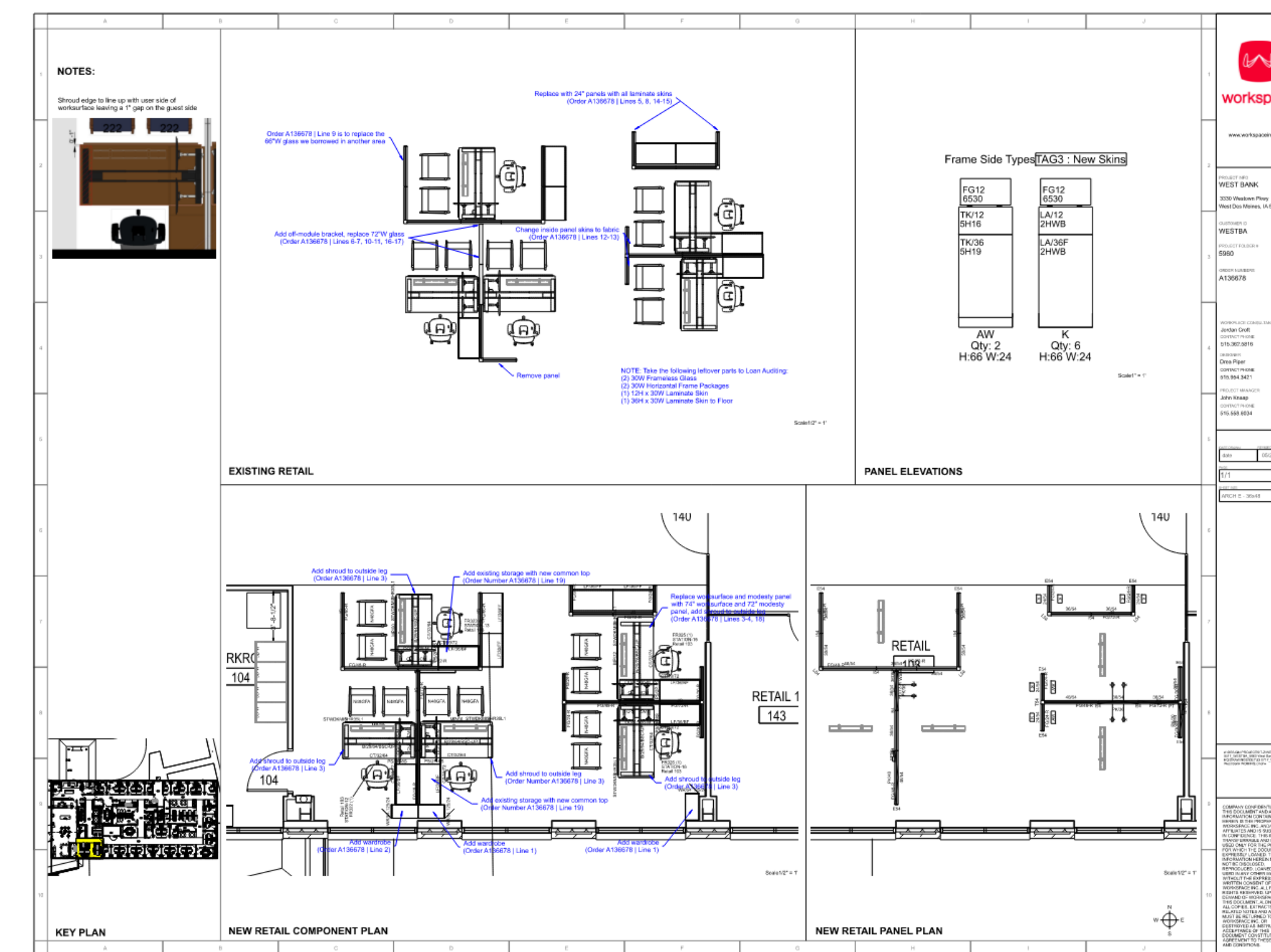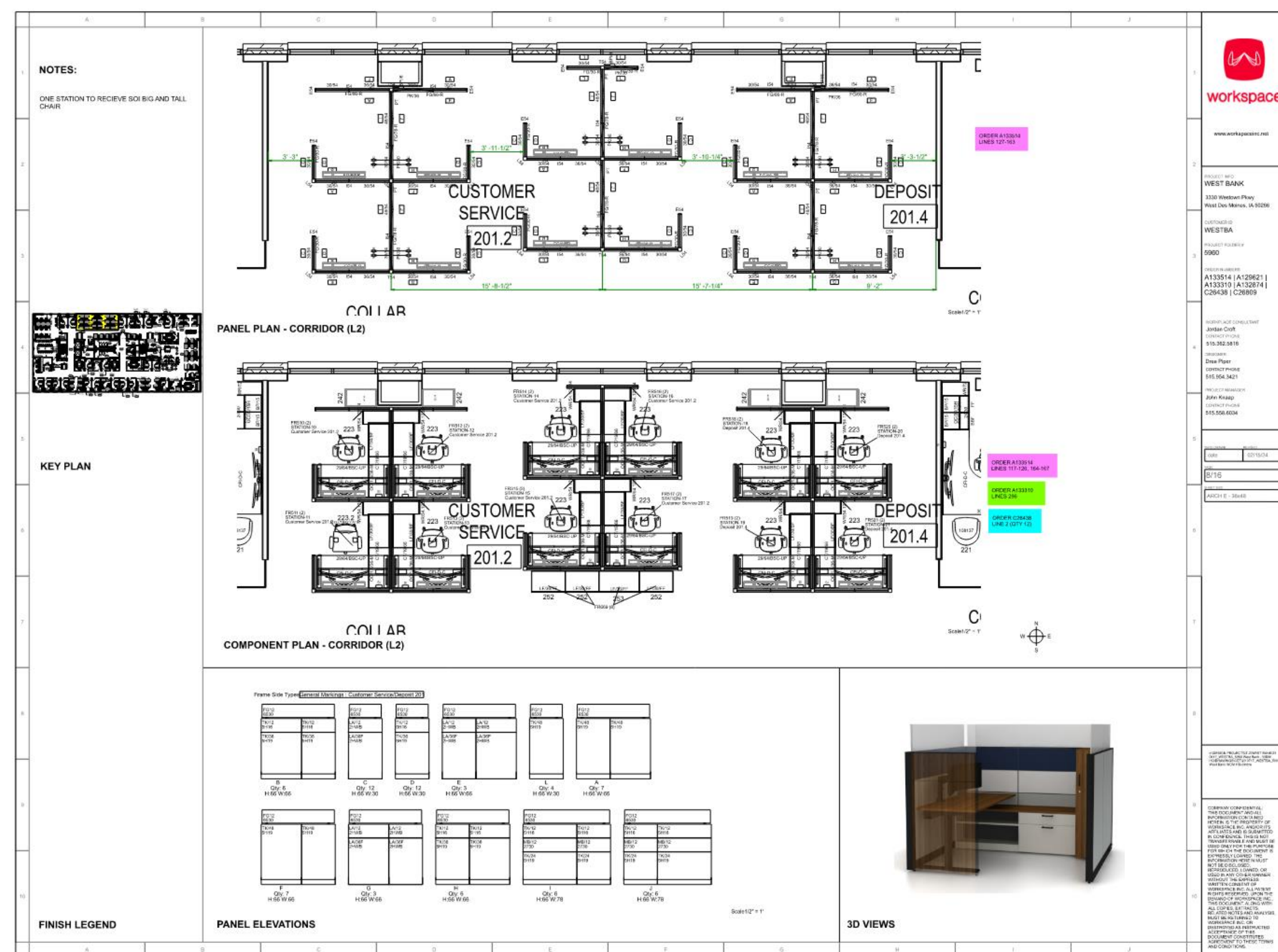
A Job Well Done:

April 15th, 2024, West Bank opened its doors to the community. From the very beginning with setting up the drawing with blocks, to the last minute reconfigure during the install, CET played a pivotal role in the success of this project. The different tools available in CET allowed me to manipulate the drawing in a way that made the project run as smooth as possible. I was able to work efficiently and communicate with both the West Bank team and the HGA team effectively. I couldn't imagine working in any other program!