OpenText Engineering Document Management

Control concurrent review and revisions of technical documentation, drawings and engineering records

Architects, engineers, contractors and suppliers require effective methods for working with a large number of technical documents that often consist of hundreds of different file types, including specialized file formats such as CAD drawings and geo-spatial information. They require a simple way to manage the complex relationships between engineering drawings and related documents within their existing business processes and to make the latest revision of these documents available as required.

With a comprehensive engineering document management solution, companies can:

- **Facilitate secure collaboration** across the extended enterprise by using structured processes for new document introduction, revision, and master record updates.
- **Improve efficiency** of document control processes, managing concurrent document review and revisions through a controlled revision tracking dashboard.
- **Improve data integrity** by referencing a complete Master Records List as well as a record of current project revisions for the most current status of documents.
- **Ensure a smooth handover** from construction to operations by controlling all transmittals, engineering submissions, and documentation in a secure environment - structured according to engineering standards.

**SOLUTION SUMMARY:**

OpenText Engineering Document Management provides a single, authoritative repository for storing and organizing engineering documents. The solution enables engineers and supporting teams with a secure and collaborative web-based environment to create, capture, review, and manage both completed and work-in-progress engineering documents.

**Benefits**

- Provides greater control over critical engineering documentation
- Ensures accurate and current information is available to all stakeholders
- Allows a documentation to be revised concurrently by multiple parties or projects
- Facilitates secure collaboration and coordination across the extended enterprise
- Scalable to support globally distributed engineering projects and facilities - even in remote locations
Concurrent Design and Review around a single point of truth

During major engineering projects, various stakeholders, such as project teams, Engineering Procurement and Construction (EPC) contractors and suppliers collaborate, often with globally distributed teams. Efficient collaboration begins in the early feasibility and design stages, to ensure the large volumes of permitting and design documentation are maintained in their latest revision, automatically numbered, cross-referenced and stored in a central repository, ready for access at any time. Concurrent design requires that a “Master” of each key document be managed in the “vault,” and that tracking of multiple versions checked out by various contractors or projects is enabled. Managing all document changes in a collaborative and integrated environment is critical to ensuring a smooth transition from any phase within a project.

A robust engineering document management solution can integrate all your technical information into the company’s established work processes and make these documents available across the extended enterprise. Engineering and construction professionals can have a single, authoritative repository for storing and organizing electronic documents and leverage powerful tools that support the concurrent design and review activities that are commonplace in large projects. Easy recall of documents will ensure timely response to issues, and will also increase the reuse of information from one project to another.

Controlled internal and external collaboration

Because of the nature of today’s business, companies not only need an efficient way to collaborate between internal and external parties that are sometimes geographically disparate, but also to track the flow of information that is shared between these parties during the span of any project. Having an audit trail of creation, receipt, approval and revisions is required to manage risks and, more importantly, to ensure accurate and concurrent information. Companies need a solution that can work on-premise, in remote branch offices; or in the Cloud.

Ensure compliance and mitigate risks

Mitigation of the compliance and economic risks should start early in the planning stages of any project by creating high quality documentation and managing these early phases to ensure compliance with Health & Safety, Environmental policy or regulations, and project management standards.

With a capable document management solution, being compliant can be achieved while being transparent, consistent and automated. Companies with a methodology to track, capture and manage the flow of information are better able to reduce risks, increase compliance and save costs by avoiding unnecessary expenditures. Ensuring that your information is structured according to your industry and corporate standards, and your revisions and approvals are auditable is critical to maintaining compliance and avoiding costly claims or litigation.

Secure integration increases user adoption

Engineering requires the creation, editing and review of CAD drawings and other technical documentation. For CAD users, having a simple solution that is native to their CAD interface (i.e. CAD Manager for AutoDesk® AutoCAD® or Bentley® MicroStation) to create, edit and manage versions of complex drawings increases usability and adoption. Not every person that reviews, comments or approves technical drawings are CAD users.

Brava! is a simple and secure tool for reviewing, annotating and marking up technical documents, including CAD drawings, without requiring the native software installed on the user’s computer. Additionally, Brava! can control and protect the intellectual property developed during projects – preserving your competitive advantage. Embedded security features and the ability to watermark, copy-protect (including printing), and apply retention policies to documents are important when distributing content with external contractors and joint-venture partners.
The OpenText Approach: OpenText Engineering Document Management

OpenText Engineering Document Management provides a single, authoritative repository for storing and organizing engineering documents. The solution provides engineers and supporting teams with a secure, collaborative web-based environment to create, capture, review, and manage both completed and work-in-progress engineering documents. Additionally, engineers can use features such as OpenText Engineering Document Management’s advanced workflow capabilities to route information and transmittal packages for review and approval, while its web-based interface provides secure access to engineering documents from anywhere in the world, at any time.

OpenText believes that Engineering Document Management should not be an isolated silo, but rather one of many integrated processes that span various business functions across the enterprise. OpenText Engineering Document Management is a solution that leverages the OpenText Enterprise Information Management (EIM) suite to integrate processes and content from SAP®, Oracle®, and Microsoft® applications, to ensure that appropriate compliance and control underpin all activities.

The Engineering Document Management solution offers consistent management and a single-point-of-truth for your engineering documentation, drawings and processes – with native integration to the applications you use every day.

Features

- Interface with leading CAD-authoring tools for document creation and revision with advanced processing and data mapping capabilities.
- Create and name documents and assets in accordance with industry or corporate numbering standards.
- Manage document revision requests and track minor revisions through various stages of design, construction and “as-built”.
- Manage the promotion of completed revisions to documents-of-record and maintain a complete history of these revisions.
- Support concurrent revisions of documents under complete document control.
- Provide web-based visualization and annotation capabilities to make engineering content accessible to users without desktop engineering applications.
- Integrate with maintenance management and ERP systems, such as SAP®, solutions, combining content and processes for users across the extended enterprise.

www.opentext.com

NORTH AMERICA  +800 499 6544  ▪  UNITED STATES  +1 847 267 9330  ▪  GERMANY  +49 89 4629-0
UNited KINGDOM  +44 0 1189 848 000  ▪  Australia  +61 2 9026 3400

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