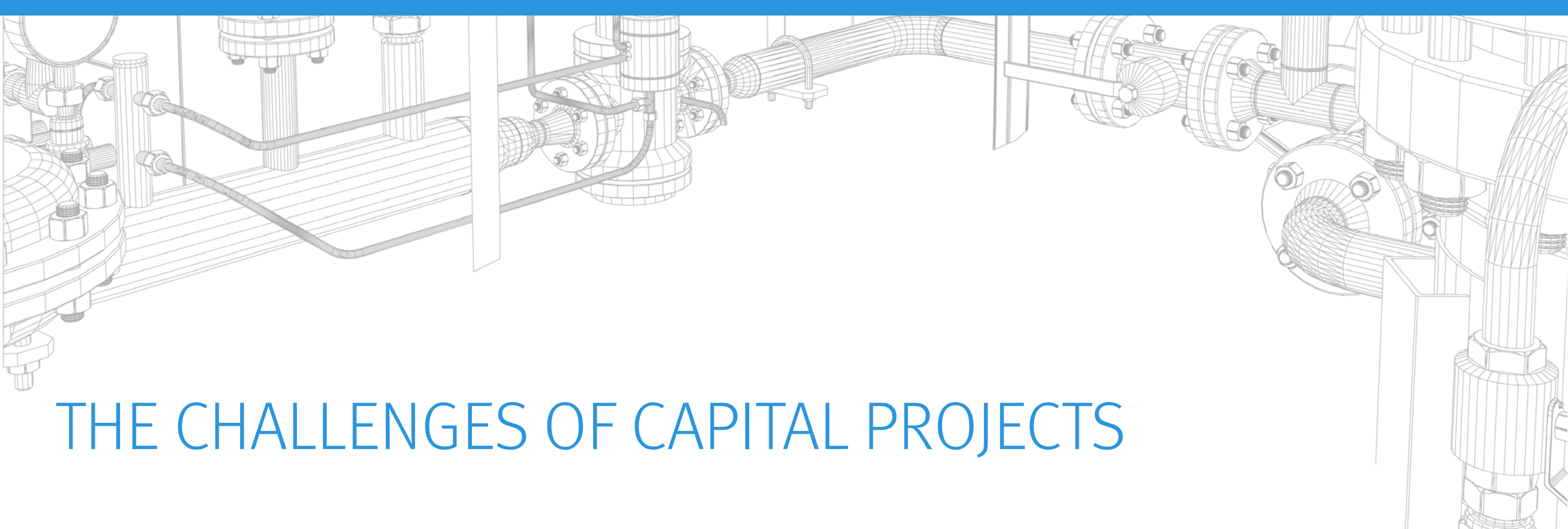


DOCUMENTUM CAPITAL PROJECTS

Using Document Control To Keep Your Projects On Track



THE CHALLENGES OF CAPITAL PROJECTS

Managing capital projects requires addressing many complex challenges at the same time. To begin with, there are multiple document types – engineering plans, CAD drawings, phase schedules, regulatory permits – that mark the start of a project and continue to grow on a daily basis.

Documents come in varying file formats and are created by different people in different organizations around the world. They reside behind firewalls to keep them secure, but inaccessible.

Yet for every phase of a project, documents need to be shared among those project and partner teams responsible for successful completion. Construction managers need to see drawings. Onsite crews need to ensure they are using the correct as-built information. Financial personnel need to know when to authorize payments. Safety personnel need to ensure proper compliance and communication with regulatory agencies.

In the past, collecting, distributing and tracking these documents has been a time-consuming and inefficient process. Finding the right document for a transmittal can mean digging through hundreds of emails or untold numbers of shared files. And recording who has seen each document takes hours of weekly production time.

The time wasted simply sharing and tracking documents leads to delays. And delays lead to higher costs, frustrated partners and customers, and increased risk.

The thought of taking shortcuts is tempting, but regulators will want to audit the document trail to ensure all needed approvals have been obtained. More importantly, they know that speeding up a project that is behind schedule can compromise safety, causing injuries or worse.

Fortunately, there's an easier way.

A SOLUTION FOR COMPLEX DOCUMENT AND PROCESS MANAGEMENT

To reduce the chaos and keep projects running smoothly, Documentum Capital Projects was created as part of the Documentum for Engineering, Plant and Facilities Management solution suite.

Gleaned from thousands of hours [collaborating with EPCs, energy and utility companies overseeing capital projects](#), the knowledge gained has been embedded in all aspects of the solution's functionality.

The result is a **robust, secure yet flexible, technical platform** from which to launch even the most complex of capital projects.

YOU GET:

▶ [Streamlined document management](#)

Control documents of all types without the delays caused by firewalls and easily determine if a document has been reviewed and approved by all the necessary parties.

▶ [Visibility into document and project status](#)

See the relationship between each phase of the project itself and the pertinent documents by syncing Documentum Capital Projects with other project management tools.

▶ [Reliable regulatory compliance](#)

Show regulators that project work is in compliance with all relevant requirements, thanks to automated records management and auditing trails.

▶ [Enhanced team collaboration](#)

Make information readily available to business partners, subcontractors and suppliers, while maintaining security by sharing documents only with approved participants.

▶ [Simplified transmittal processes](#)

Reduce the effort needed to generate transmittals so that contractual and compliance commitments are met in a timely fashion and the work keeps moving forward.

▶ [Ease of access, including mobility](#)

Let team members tap into the latest information at any time, from any location, with a full range of access options.

▶ [Rapid, repeatable setup of the solution](#)

Get the solution up and running quickly to avoid project delays with built-in workflows and other templates common in capital projects. Tweak it to meet your organization's needs and redeploy it for other projects with minimum rework.

▶ [Low start-up cost and effort](#)

With flexible licensing and deployment options, there is no need for a steep cash outlay to get going – Documentum Capital Projects is available as a cloud-based managed service.

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EFFECTIVE MANAGEMENT OF PROJECT DOCUMENTS

is fundamental to capital project success.

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MANAGEMENT OF ALL DOCUMENT FILE TYPES

CAD drawings, engineering plans, project schedules and everything else that is part of the capital project can be accessed and controlled without a hitch.

EASE OF DOCUMENT SHARING

All participants get access to the information they need, when and where they need it.

FLEXIBLE SECURITY MEASURES

Control who gets to see each document. Subcontractors and suppliers, for example, don't see documents that are irrelevant to their assigned tasks.





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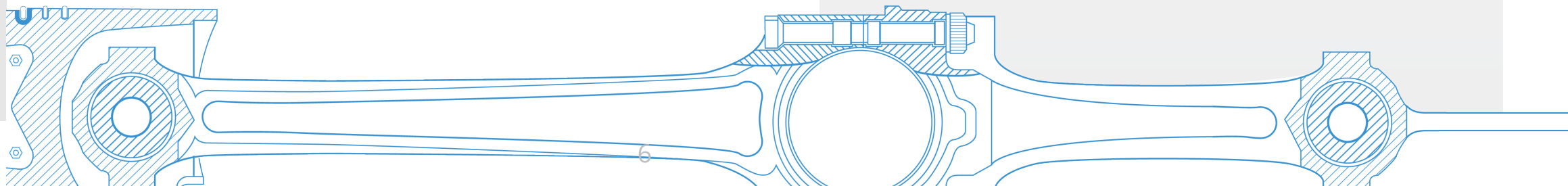
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Documents capture everything from the initial ideas to the final sign-offs months or years later. The problem, of course, is managing them in all of the steps in between.

If you've ever had to find the right document quickly, you know how daunting a task that can be without a well-considered, well-run system for creating, tracking, sharing, storing and securing all of that project documentation. Without a better alternative for sharing files with others, project managers are forced to relay key documents by shipping them overnight to locations hundreds or thousands of miles away.

While email systems or FTP methods can help, there's still the matter of storing and sorting documents. Hunting through hundreds of emails, file shares, and other silos of information isn't much faster than combing through filing cabinets.

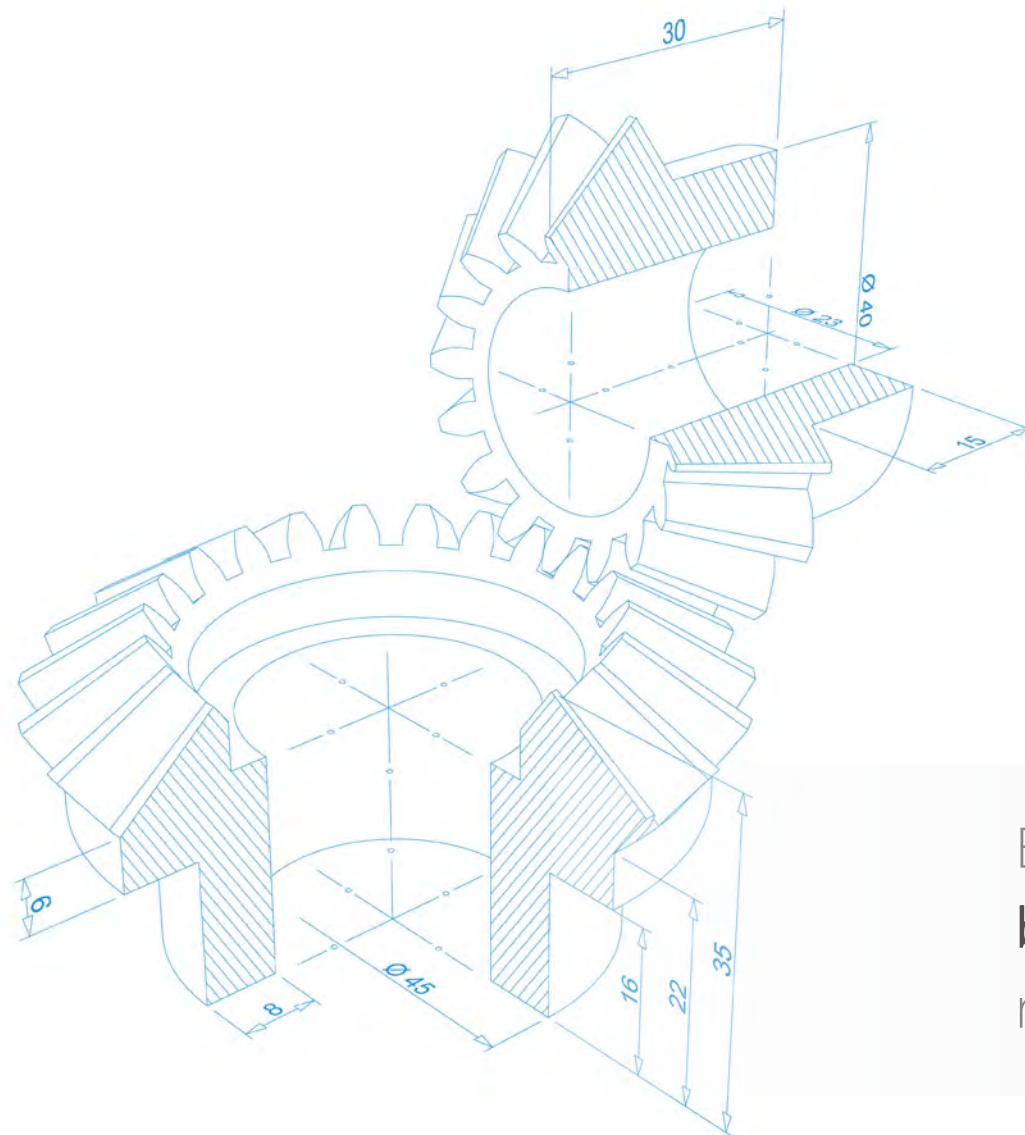
These are some of the fundamental reasons why Documentum Capital Projects was created. **With this solution, you're able to manage all document file types – CAD drawings, engineering plans, regulatory permits, and project schedules.** You can access and control them without a hitch, simplifying your life and taking the first of many steps to get your projects under control.



VISIBILITY INTO DOCUMENT AND PROJECT STATUS

You're likely already using a project management application to keep track of all the project activities, key milestones, resource usage and the like. Documentum Capital Projects is not intended to replace your project management software. It's intended to work with it so that you have visibility into both what is happening at the site and where the pertinent documents are that affect those actions.

By merging information from these two applications, you'll know, for example, that the site crew received the updated engineering documents and signed off on them, so they're ready to begin the work described in the project management application. Dashboards and reports allow you to [monitor progress in real time](#) and to share dashboard views with others.



Documentum Capital Projects is easily integrated with other systems your organization may be using. For example, project management systems can be integrated with the solution to help project managers better manage all aspects of the project. Geo-aware content can also be seamlessly included so you can incorporate an application such as ARC GIS or Google Maps with the solution.

By having insight into both project management activities and the accompanying documentation, project managers can more readily accomplish exactly what they're hired to do:

Bring a project to completion **on time, on budget and in compliance** with all relevant regulatory requirements.

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One of the biggest concerns for those overseeing capital projects is

STAYING IN COMPLIANCE WITH REGULATIONS

Health – Safety – Security – Environmental

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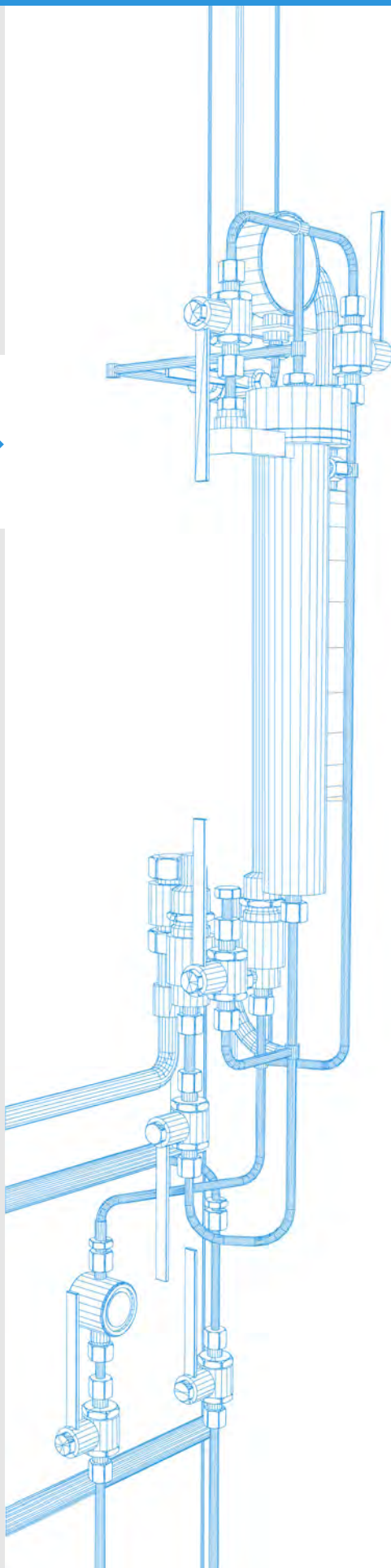
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RELIABLE REGULATORY COMPLIANCE

When information is incomplete, missing or inaccurate, the project can be forced to stop until regulators are satisfied. Those delays can be costly. More importantly, failing to adhere to measures designed to minimize risks can eventually pose safety issues once the plant is built and operating.

No wonder that project managers spend hours tracking documents to ensure that critical information has been seen and approved by everyone required. But that process doesn't have to be so taxing.

Documentum Capital Projects includes [automated review workflows](#) that ensure reviews are enforced and approvals can be executed with electronic signatures. Materials that are “to be read and understood” are tracked and reported. So managers get a full audit trail of day-to-day document interactions without any extra work on their part.

With regulatory concerns addressed automatically, **project leaders are free to focus on other issues** that need their guidance. When regulators want to execute site visits, conduct audits or perform inspections, the management team will be **ready and confident that all the processes have been followed** at each step of the project.

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IT TAKES THE COLLABORATION OF EXPERTS

– SOMETIMES HUNDREDS OF THEM –
To Successfully Execute a Capital Project.

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ENHANCED TEAM COLLABORATION

But tracking who needs to see what can be a monstrous undertaking. After all, you not only have team members from various business partners to consider, but you also have subcontracting organizations and suppliers. Yet your IT department wants to be certain that all content is shared securely.

Documentum Capital Projects makes it possible to do just that with an [easy-to-manage method of distributing documents](#) to those who need to see them – based on their roles -- in a timely fashion. Your pending tasks and relevant content are at your fingertips after you log in, eliminating the need to search for that material. There's no need for your IT department to assist with the setup – it's that simple.

Team members can track changes made during a review. And because the solution manages document revisions, **participants know they're working with the correct document.**

Suppliers can receive documents and add markups as needed. In short, you can improve design quality while reducing the time it takes to get the work done.

1/3

or more reduction
in the user training cycle

Thanks to the Solution's
Ease of Use

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SIMPLIFIED TRANSMITTAL PROCESSES

Tracking transmittals in capital projects is tough. It frequently requires spending hours or days assembling documents and ensuring they have been delivered to everyone who needs to receive them. Even so, you're never quite sure that you've accidentally overlooked some participants, sent them the wrong version or failed to get an approval.

All this work and uncertainty inevitably leads to delays at a minimum. More importantly, failing to properly handle transmittals can mean missing approvals, payments and handoffs between contractors – in violation of legal commitments.

Documentum Capital Projects simplifies the transmittal process by automatically assembling transmittal packages, including a cover, receipt, and/or acknowledgement sheets. The solution also features uploading tools for handling incoming or returning transmittals and filing them based on their classification. You can distribute transmittals via email, web links, FTP, external portals or by using Syncplicity.

Syncplicity is a **secure, advanced document-sharing platform** that combines ease of use and ease of access.

For more information, please visit:
www.syncplicity.com

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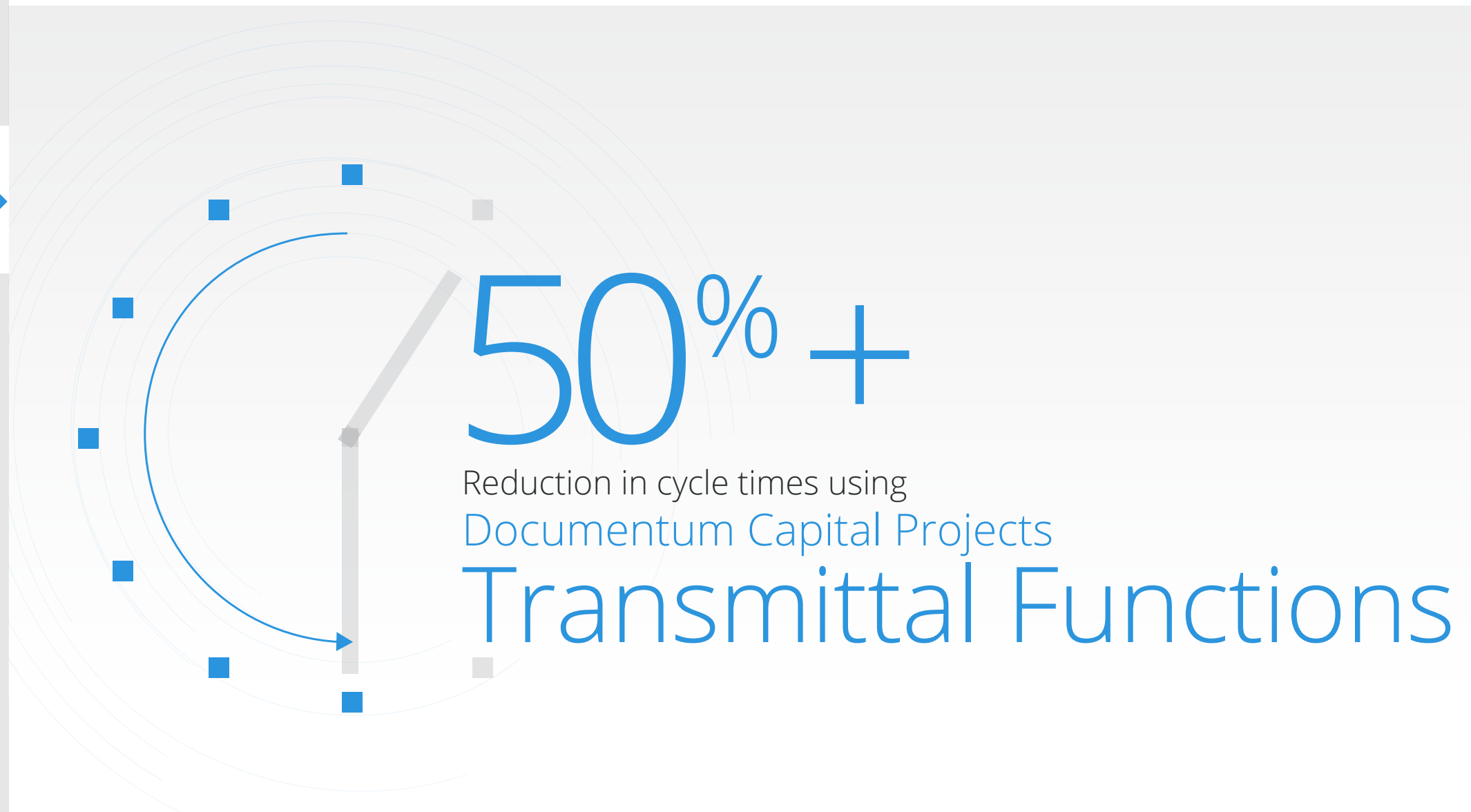
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To save time, you can define standard distribution matrices once and reuse them throughout the project. With the ability to track your transmittals at a glance, **you eliminate virtually all of the uncertainty of monitoring transmittals.** And because the solution does all of the work for you, you avoid the strenuous manual efforts typically associated with transmittals.



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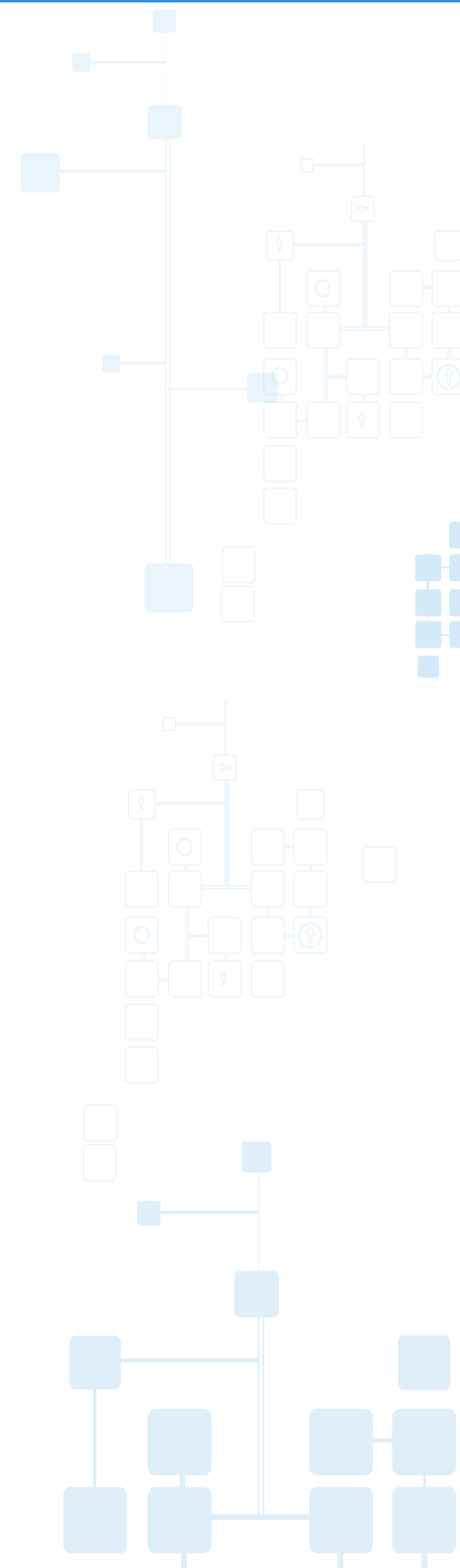
With team members participating in a project from dispersed locations, you need to provide easy access to the latest information, no matter their method of connecting to the solution. After all, you risk delays or outright communications failures if participants need to be sitting at a desk to catch up on the newest developments.

Easy access to project documentation is key when you have a task pending. It's helpful to be able to search by discipline (such as piping or electrical), asset type (pipe, valve, pump) and tag number. It's particularly valuable to have project documents organized in a familiar structure, consistent from project to project (whether by contractor or project phase), and easy to navigate.

Documentum Capital Projects makes it possible for critical participants to access content, have a hand in workflows and securely share information – **wherever and whenever they wish.**

Because the solution is compatible with mobile and tablet devices – including iOS and Android platforms – document access is accelerated. Changes can be synced and shared, regardless of your location or device. Team members, including subcontractors and suppliers, can share information as needed and as permitted. During construction, field personnel, subcontractors and suppliers are assured they have the latest information synced to their mobile devices. If needed, they can submit change requests that automatically trigger updating processes for the relevant information.

It's quick, it's convenient, and it's essential for today's capital projects.



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WHAT IF IT TAKES MONTHS TO GET A SOLUTION UP AND RUNNING?

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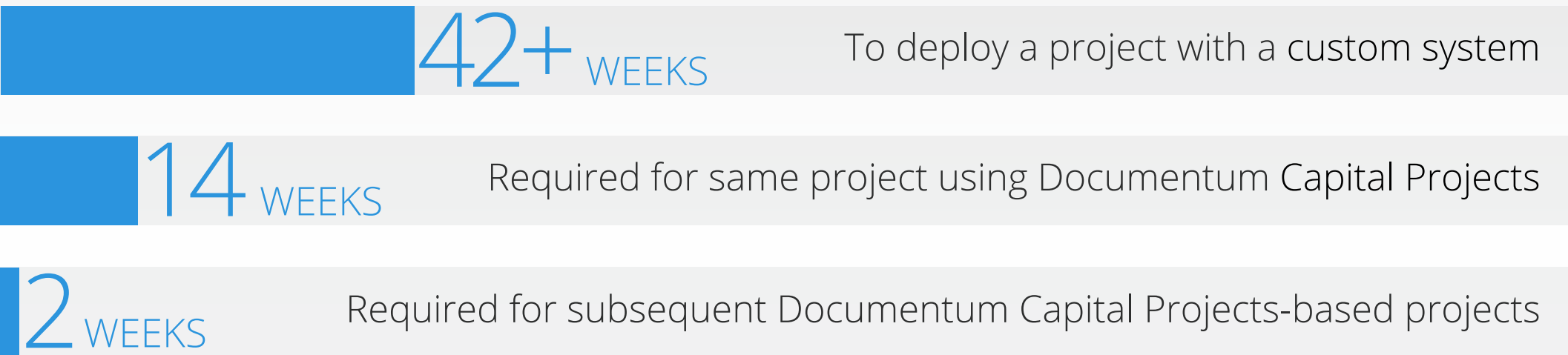
RAPID, REPEATABLE SETUP OF THE SOLUTION

You lose precious time that could be spent getting the project work done while trying to configure the application to meet your needs.

Fortunately, the Documentum Capital Projects solution comes with [features that greatly simplify and speed up its deployment](#). Prebuilt tools, metadata, and templates that leverage industry best practices – including project structures, business rules, security profiles and distribution lists – are included. At the same time, you don't want a solution that is so locked down that you can't modify it to meet your project's unique needs. So Documentum Capital Projects is configurable, letting

you tweak it to fit with your team's requirements and preferences.

As beneficial as these features are the first time you deploy the solution, they're even more valuable in subsequent deployments or simultaneous projects. You can count on a consistent approach from one endeavor to another and rest assured that you're addressing the critical components essential for an on-target, on-budget, in-compliance project.



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LOW START-UP COST AND EFFORT

The sophistication of the Documentum Capital Projects solution is the result of literally thousands of hours of development time. But you can put it to work for your team without incurring burdensome financial obligations and staffing time.

In addition to traditional on-premise options, Documentum Capital Projects is also available as a cloud-based managed service that is offered on a subscription basis. When deployed using OnDemand, the solution is installed, tested and maintained by experts. That means there is no need for your organization to use your IT team to take on all of the time-consuming burdens of getting the solution up and running, then managing and updating it. It is all handled by OpenText (including backup and disaster-recovery functionality). And your financial department will appreciate being able to treat Documentum Capital Projects as an operating expense, not a capital expense.

With such low financial barriers to begin using Documentum Capital Projects – along with its effort-saving and risk-reducing features – [isn't it time to put this solution to work for you and your organization?](#)

OnDemand
Has Common Architecture and
System Expertise

||
results



TCO
Reductions of
30%-60%

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ENHANCED CONTROL, REDUCED STRESS

Capital projects will always be complex endeavors. But managing them – and the documents that accompany them – can be made easier with the help of the Documentum Capital Projects solution.

Putting the knowledge and know-how captured in this solution to work **MAKES MANAGING DOCUMENTS FOR CAPITAL PROJECTS MORE EFFICIENT.**

YOU CAN:

- Enable project teams, suppliers and contractors alike to create, manage, review and approve documentation with secure document control
- Get projects up and running quickly with templates and workflows based on industry best practices, as well as OnDemand
- Streamline and automate transmittal processes
- Track progress against project milestones at a glance
- Maintain compliance and inspection readiness for all relevant regulations, including health, safety, security and environmental requirements