OpenText Controlled Revision Tracking

Document lifecycle management for controlled records

Whether it is construction or asset/plant management, accurate controlled engineering records are fundamental. If these records become out-of-date, or updates and changes are lost, confidence in the accuracy of controlled records weakens, leading to non-compliance exposure, legal liability, and increasing rework costs.

OpenText Controlled Revision Tracking manages your controlled records from creation to disposition with a consolidated Engineering Document Management Dashboard. It is designed for the engineering document management needs of the Owner/Operator, as well as engineering contractors and vendors. By providing a controlled Master Record environment, users of drawings, SOP’s, manuals, and other content are ensured the content they are using is the latest approved revision available.

With Controlled Revision Tracking, you can:

- **Facilitate collaboration and coordination** - Use structured processes for new document introduction, revision, and master record updates
- **Improve efficiency** - Ensure transparency of document revisions and management of concurrent document editing through a single user interface
- **Improve data reliability** - Reference a complete Master Records List as well as a record of current project revisions for the most current status of documents

For each document, users are provided with the transparency to see if a drawing or other document is being modified and who is currently working on it. The complete visibility into the evolution of each document enables users to make informed decisions.

Using structured processes, users can request new controlled documents, revise existing documents, and update Master Records. For each of these processes, Controlled Revision Tracking tracks critical information for individual revisions, such as who requested and approved that action, which project the revision is associated with, as well as the status of the individual revision.

Employ OpenText Content Server workflows and these processes can be tailored to a company’s specific approval process.

**Benefits**

- Simplifies the revision process
- Provides control over critical documentation
- Ensures accurate and current information is available to the entire enterprise
- Allows a document to be revised by multiple parties concurrently
- Reduces delays caused by documents being checked out to other parties
- Facilitates coordination between projects by providing transparency of document revisions
- Scalable to support projects and facilities across the enterprise

**Controlled Revision Tracking and Enterprise Information Management:**

- **Information Governance** – Capture, manage and control content through its lifecycle in accordance with corporate policy and government regulations.
- **Information Security** – Ensure compliance to security standards.
- **Process Velocity** – Improve engineering design process efficiency and management through automation.
- **Business Impact** – Implement processes that ensure rapid handover to operations.
- **Business Insight** – Provide complete visibility into the life of each asset and enable users and managers to make informed decisions.
For the owner/operator, data can be organized by facility to assure data integrity. This data is automatically filtered by simply selecting the facility from the Organization Unit dropdown (1). Numbering conventions and review/approval processes are standardized per facility, allowing you to easily manage many facilities with unique processes. Permissions can be set to allow for global or facility/project specific access.

For the contractor, data can be organized by customer and project and this data is automatically filtered by simply selecting the customer from the Organization Segment dropdown (2). New customers are easily added/configured since your standardized processes are automatically applied to new customers/projects. Permissions can also be set to allow for global or customer/project specific access.

The Controlled Revision Tracking (CRT) Dashboard provides a centralized view for all controlled data. The CRT Dashboard is the hub where users can interact with documents at all stages of their lifecycle. For the consumers of data, users have access to the latest Master Records. For Document Controllers and producers of data, they are provided with a single point of access to the tools supporting the creation, review and approval of the controlled records.

For instance, the CRT Dashboard enables document creators to execute forms designed to generate unique customer document numbers, from one or more numbering schemas (3). When documents are ready to be checked-in for review, they can be checked into the system in batch (4); Automatically assigning them to the proper review/approval process (5). Within this process, multiple users are able to view/markup the file, with each edit being tracked to the specific user making comments. The document can then be sent back to the originator for updates via the Transmittal interface (6); and when the documents have been approved, the master records are updated (signed in) to the Master Record List.

Controlled Revision Tracking provides a consolidated user interface for the entire Engineering Document Management Suite, which also includes Automatic Document Numbering, Advanced State Management, Transmittals, Brava!, and CAD Manager. These modules work seamlessly together to provide a fully functional engineering document management solution. For example, the Advanced State Management integration enables you to define unique and customized review and approval processes (ProcessFlows) for each project. This allows you to automatically leverage your standard review and approval processes, which are automatically available for all projects within an Organizational Unit, while giving you the flexibility to add project specific ProcessFlows.
## FEATURES

<table>
<thead>
<tr>
<th>MANAGES NAMING CONVENTIONS</th>
<th>With Automatic Document Numbering, naming conventions can be managed for varying content types as well as different departments, facilities or plants.</th>
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<tbody>
<tr>
<td>CONTROLLED CONTENT CREATION</td>
<td>Content creation can be configured to allow creation by any user or managed through a process ensuring approval from a group like document control before content is added to the controlled records area.</td>
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<tr>
<td>SEED FILE CREATION</td>
<td>As document numbers are assigned, seed files can be uploaded based on document type. For example, if a number is created for a CAD drawing, a standard CAD drawing can be used as the seed file assuring the new drawing is designed using the company’s drawing standard. Each seed file can then be automatically classified with the appropriate metadata.</td>
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<tr>
<td>CONTROLLED REVISION REQUESTS</td>
<td>Revision requests can also be configured to allow for creation by any user or managed through an approval process. When the revision is created, it is automatically assigned to the proper project/contract.</td>
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<tr>
<td>MULTIPLE REVISION TYPES</td>
<td>Out-of-the-box revision types include: Pre-Construction, Construction, As-Built, Void and Obsolete. Additional revision types can also be added to the system.</td>
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<tr>
<td>REVISION STATUS TRACKING</td>
<td>The status of each revision is tracked. Users are able to see which revisions are currently works-in-progress, the current Master Record, and historical Master documents.</td>
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<td>CONCURRENT REVISIONING</td>
<td>Controlled Revision Tracking can allow for multiple revisions to be concurrently requested and reviewed, provided business rules allow for this. NOTE: The ability to update the Master Record is limited to only one revision at a time, thus preventing overwriting changes of these revisions.</td>
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<td>STAKEHOLDER TRACKING AND NOTIFICATION</td>
<td>Stakeholders are defined as users that have an active revision of a document. When any activity on a document occurs, stakeholders are automatically notified via email. These activities include another user requesting a new revision or the updating of the Master Record.</td>
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<td>REVISION HISTORY</td>
<td>All controlled records have a revision history viewable from the document properties. This provides a real-time summary of all revisions (past and present) and the state of those documents currently checked out for revision. Users can also see which other users are revising documents.</td>
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<td>MULTI-SITE, MULTI-FACILITY SUPPORT</td>
<td>The system can be used to manage multiple facilities and sites within a single consolidated Content Server repository.</td>
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<td>CROSS REFERENCING TO ASSETS</td>
<td>Controlled records can also be cross referenced to assets or equipment tags, providing an easy review of all documents pertaining to specific assets.</td>
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<td>REPORTING</td>
<td>Reporting is provided for consolidated views of controlled records.</td>
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