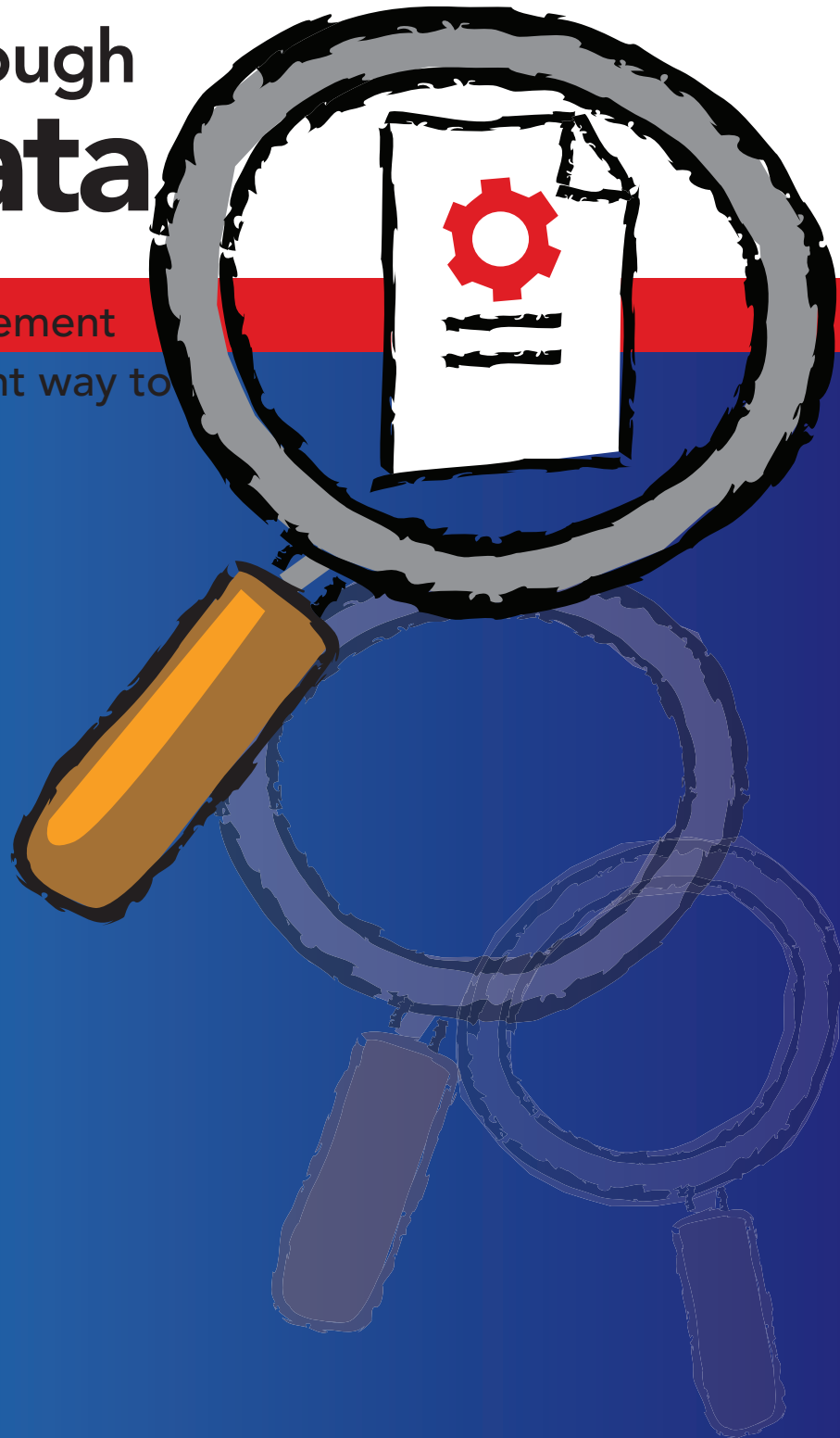


Fast Searching Through Design Data

Engineering Document Management
gives you a faster, more efficient way to
find files.



We live in a fast-paced, information-laden industry where profitability is based on time-to-market and constant, tight deadlines. That's why it's critical for design engineers to be able to quickly find the latest version of a file and even better — all the documents that might be relevant and related to that file. For example, let's say you want to find the latest version of an assembly, and its related ECO/ECN (in either Word or Excel format), plus a raster file, PDF or other file that had the same project number or client ID number as that assembly.

That task would be difficult, relying on the search tools of MS Explorer. You face the frustrating and tedious task of clicking through ever-expanding folders within a multi-branched tree structure. Then, once you find the right folder, there's a long vertical list of filenames that may or may not have a standard naming convention.

Before Engineering Document Management (EDM), there were days when it took 15 minutes to find a file buried someplace on a network drive. Multiply that by days and weeks and it quickly adds up to way too many hours searching for files instead of doing the job you're supposed to do. Try a time test yourself if you want your own baseline.

So what is the option? Instead of using MS Explorer to root through nested folders, use an EDM system that finds documents by looking at the metadata. Metadata is the information about the document, such as product number, client name, drawing attribute and document properties. Using EDM, you can find, track revisions and manage inter-relationships of virtually any Windows files.

Adept is a simple, powerful engineering document and file management solution that is tightly integrated with Autodesk, SolidWorks 2D and 3D design products, MS Word and Excel. If you have an EDM system like Adept, you can leverage three flavors of SQL as a back end — MySQL, MS SQL Server, or Oracle — to create a centralized repository for all of your CAD and related engineering files. Moreover, Adept gives you the added benefit of a revision history database, an audit trail, where-used information, and a workflow system that ensures you know where the file is in the approval process and who is working on it now.

There are cooler, easier, BETTER ways to find files than using MS Explorer — we'll demonstrate them using Adept.

The Library Card is at the heart of Adept's EDM system. You can design your own custom Library Card based on the type of information you want to track and manage, such as drawing attributes, project number, owner, and more. Most importantly, after you design your Library Cards, you can instruct Adept to import all your legacy files and it automatically populates your Library Cards with attributes and properties from those files.

Here's a picture of an Adept Library Card (Figure 1). On the first tab of this Library Card you see the search criteria that is relevant to a design group — Doc Title, Company, ECN Number or Document Type, to name a few. Notice that along the top of the Library Card there are different tabs.

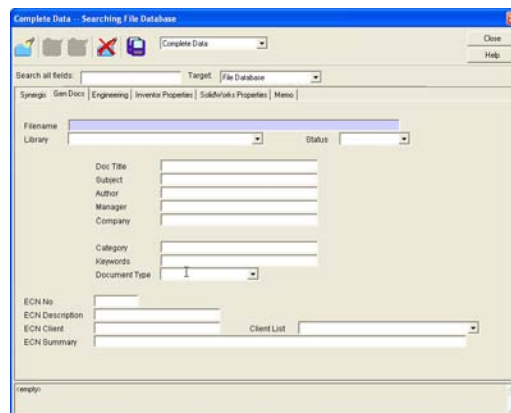


Figure 1: An Adept Library Card

Figure 2 shows you the relevant search criteria for tracking ECO and ECN information. Other tabs on the same Library Card might include criteria relevant for sales or marketing or quality control. Each tab provides a different view into the database to display information that is relevant for a particular group of users. That's a lot for granularity and flexibility searching than simply the name of the file, type, date and size in MS Explorer.

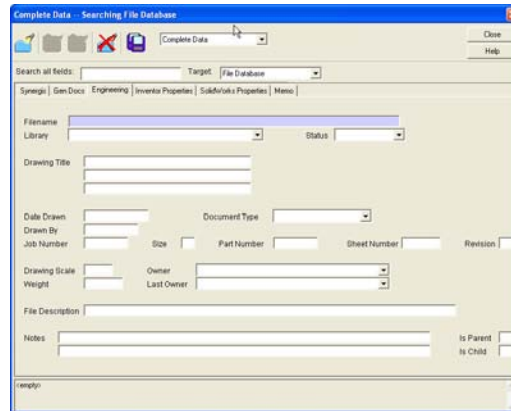


Figure 2: Search criteria for finding an ECO/ECN.

Once you set up your search criteria in the Adept Library Card, searching becomes a snap. For example, in Figure 3, the Adept Library Name (think: file folder name) and the Document Type (e.g. drawing) are used as Search criteria. Adept sifts through several thousand files and shows you the results in a search Window.

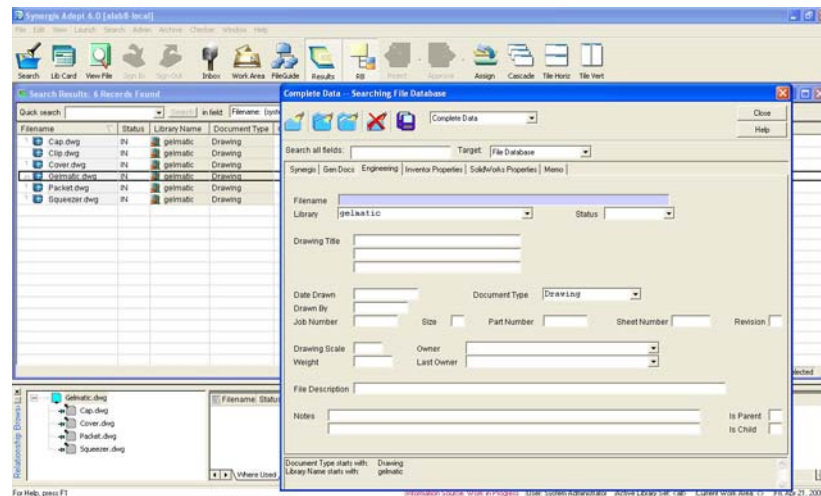


Figure 3: Adept searches through thousands of file to show you the results—in a snap!

The search doesn't have to end there! You can append a new search to the previous one, and find even more specific information. In Figure 4, we've added the Library named "Leveler" to the previous search:

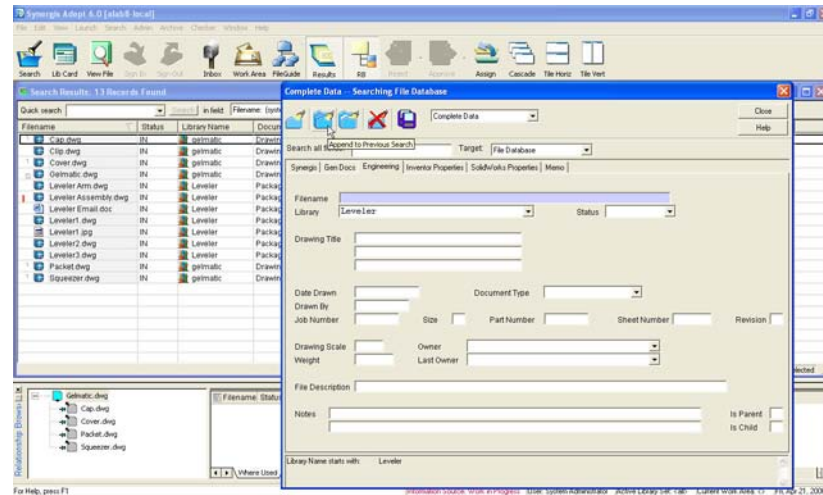


Figure 4: Adept lets you append searches to get more specific information.

Or, you can search within a previous search to get more precise results as shown in Figure 5.

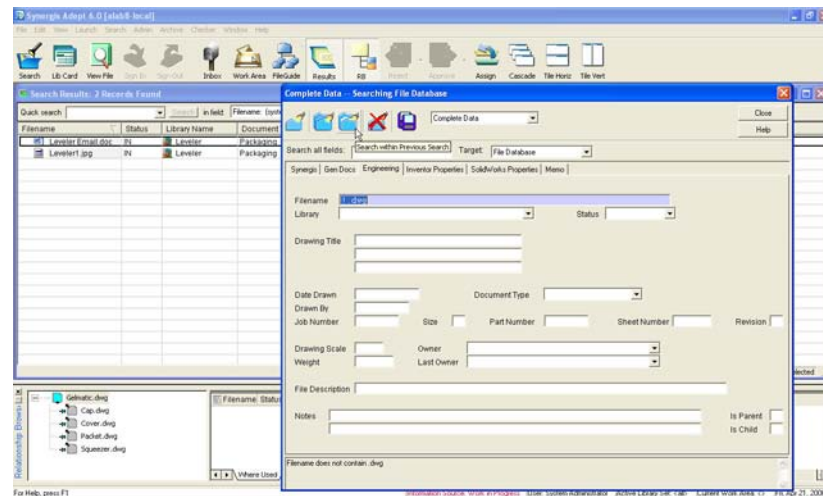


Figure 5: With Adept, you can search within previous search sets.

One of the neatest ways to search is using the Adept FileGuide. The FileGuide displays files in a hierarchy that you define, based on the arrangement of database fields as shown in Figure 6.

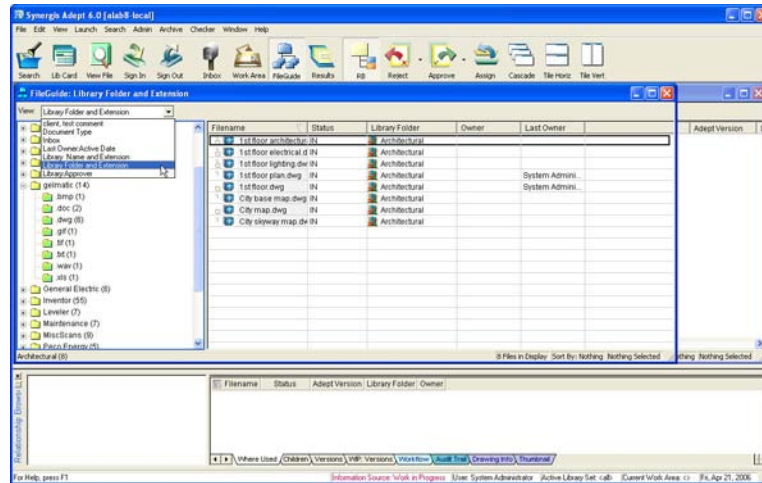


Figure 6: The Adept File Guide displays files in a tree-like hierarchy that you define.

With an EDM system, you have the added benefit of a database and metadata to give you much more powerful searching capabilities than you could ever achieve with MS Explorer. As PC users, we've been pretty much molded by the folder metaphor of the operating system. Because we are used to it, we say we like it. But if you've ever been frustrated by wasted minutes and hours looking for files, losing files altogether, designing from the wrong revision and — even worse — building a customer order from the wrong revision, you may consider that an EDM system delivers a far-superior solution than MS Explorer.

For more information about Adept engineering document management, visit www.SynergisSoftware.com or call 800.836.5440.

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