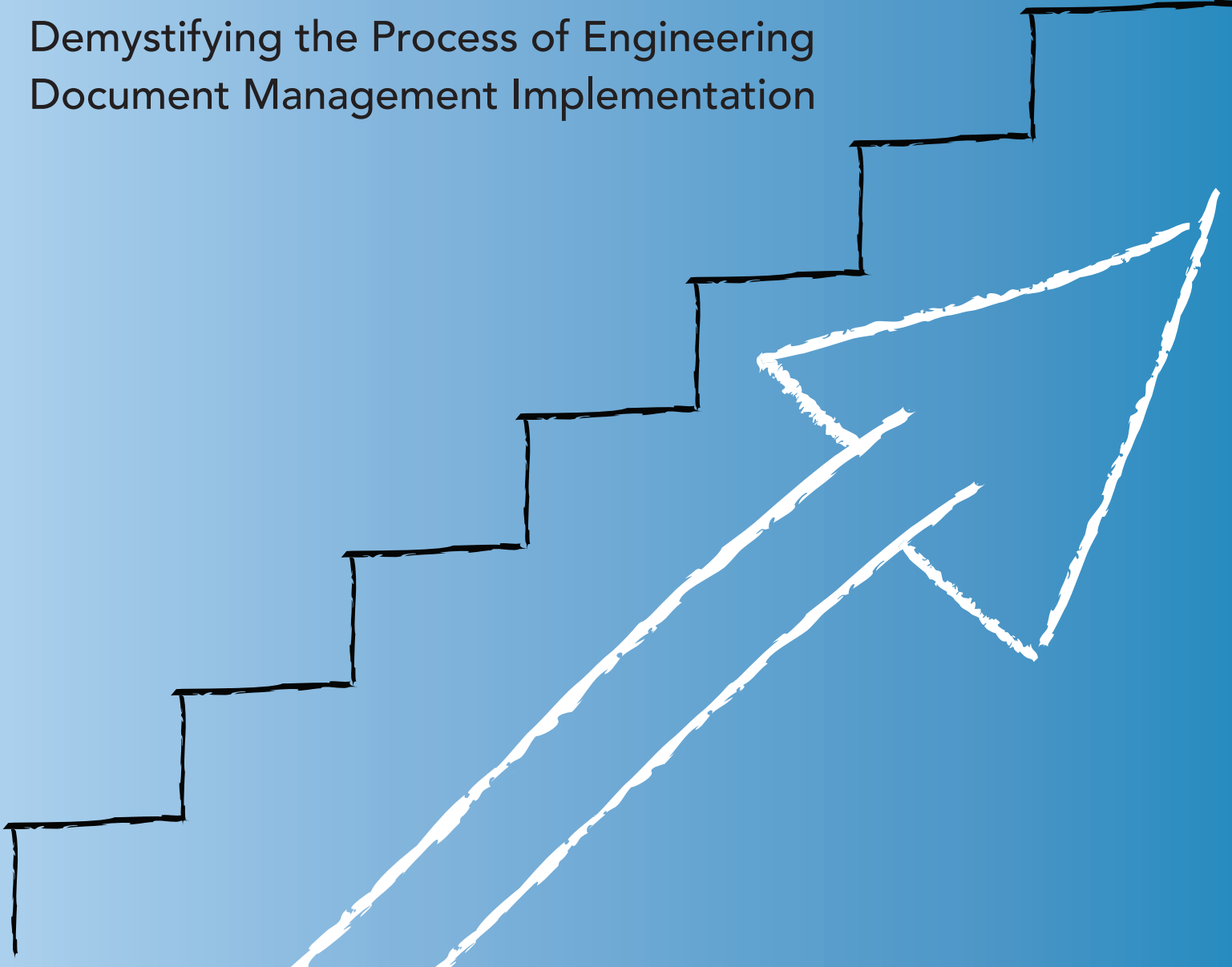


7 Steps to Highly Effective EDM

Demystifying the Process of Engineering
Document Management Implementation



Introduction

Management has determined it's time to invest in an engineering document management (EDM) system and you've been put in charge of implementing the system. The company is well aware of the benefits of EDM including, gaining better control and management of data, increased productivity, improved quality, better collaboration and communication, and a positive impact on the bottom line.

Find Data Easily

An EDM system can automate the importation of legacy data into a database, where it is easily searchable on multiple criteria.

You've interviewed likely users, done the research, and have purchased an EDM system. Now what? The one outstanding issue of implementation remains. In order to facilitate a smooth transition to the new system, it is important to recognize both the best practices to follow and pitfalls to avoid. By identifying these steps early on, you can assure an effective and efficient implementation.

While every implementation is unique, there are several similarities. Here are the top seven most common steps to successfully implementing an EDM system.

1 Pre-Implementation Consultation

A pre-implementation consultation includes an in-depth analysis of your existing procedures and processes and a thorough understanding of your goals. You'll want to craft a plan that gives you measurable results; e.g., finding documents faster, eliminating duplicate files, or better collaboration between team members. This plan should be an interactive process with your EDM vendor and your in-house team that not only educates them about your specific environment, but also educates your company's staff about the solutions and the steps required for a successful project rollout.

Here's an important tip: Do not under plan. Make sure you are taking into account the needs of all your users at all levels of the system. While you may have many CAD users, you'll also need to consider designing the system for business and other non-CAD users so that they can easily access information from a project without jeopardizing the integrity of the

Never under plan.

Make sure you consider the needs of all the people who need access to your data.

original design. You should also consider planning ahead for other departments, such as accounting, manufacturing and marketing, that might want to manage their information in the system.

2 Importing Legacy Data

Next, you'll want to import your legacy files, plus any legacy databases in which you already store document information. This could be an existing EDM system or another business system database.

While this step may vary in manner and complexity depending on the solution you select, most EDM systems have some kind of tool for automatically importing legacy files and automatically adding a database record for each file it finds. Some systems also import data from Autodesk DWG, SolidWorks, Microstation and Microsoft Word or Excel files that you have set up for extracting attributes and properties.

If you have been running other EDM systems, or informally tracking your files with a database or spreadsheet, you might choose to import your existing database records. Synergis Software, for example, provides custom migration services to import this external data.

If you've been using Windows Explorer to manage your files, the volume of nested file folders can be the bane of a migration project. That's why it's critical to look to your EDM vendor for tools and expertise when migrating data from other EDM systems, other non-standard database formats, or from simple or complex databases.

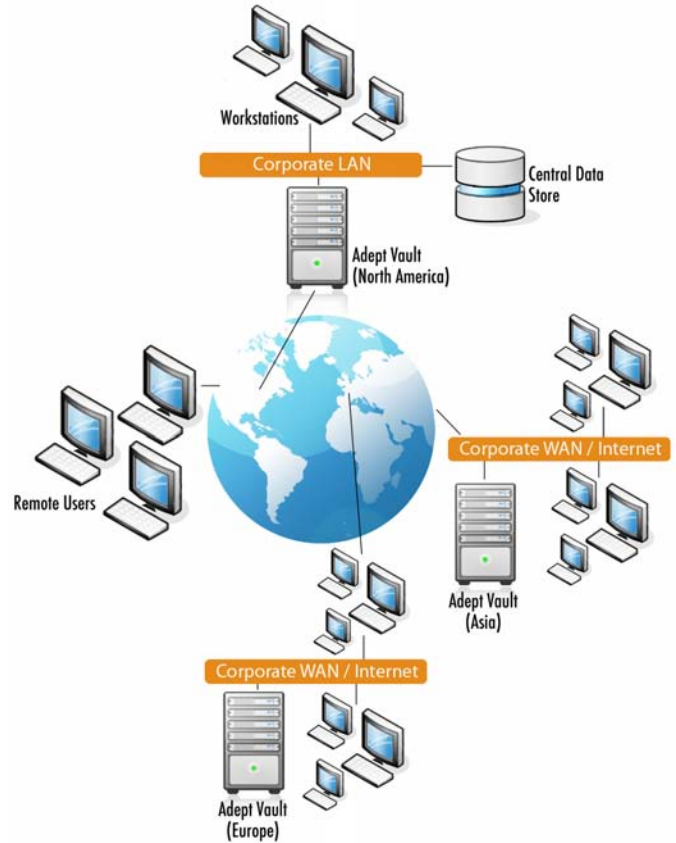
Some EDM systems, however, scramble file names and folders, making it extremely difficult to access your data after it is imported into the EDM system. Make sure you have an exit plan that allows you to retrieve your data assets anytime, anywhere.

3 Network/Internet Storage Locations

Collaboration with remote users and distributing documents to remote or global teams has become an established fact in business. Depending on your needs, you might want to set up vaults at remote locations or allow remote users to access your data in a centralized repository. Ask your EDM vendor to help set up the best configuration for your particular

situation, while giving you plenty of room to adapt as your installation grows.

Moving large files across the wire requires that you have an optimal infrastructure in place. For example, a dial-up connection between remote locations is a recipe for frustration and potential failure. There are hardware upgrades to clients and possible LAN, WAN, and Internet connections to anticipate. Testing ahead of going live can help you address infrastructure challenges.



Managing Data

across multiple geographically dispersed design teams is one of the most important benefits of an EDM system.

4 Integrate with Other Information Systems

Data contributes the most value to your organization when it's in a standard format that can be shared among other business information systems. To get there, you will need to look at the import and export functionality of your EDM system. For routine processes, it's best to automate the exchange of data by using your EDM's Application Programming Interface (API).

5 Training Users and Administrators

The proven way to win user acceptance, and rapidly gain benefits from the software is through training—either in a classroom or onsite. Ideally, you'll want to get your administrators thoroughly trained prior to implementing the system. With classroom training, an administrator can learn how to implement a system from people who have real-world experience. Your administrator can then train your staff to use the system which gives you the best value for your training investment.

Training is essential.

Don't ever mistake technical support for in-depth product training.

It might be wise to send at least two representatives to training to ensure that the knowledge you are investing stays with your enterprise should one administrator leave the company.

6 Post-Implementation Support

Most EDM vendors offer a number of ways to support your software after installation. This can include telephone support (annually or as-needed), Web-based support, and onsite support. You'll want to determine the option that best meets your organization's needs. Some vendors offer educational Webinars, or recorded trainings or videos. Most importantly, don't make the mistake of assuming technical support will substitute for actual training when trying to implement a system.

7 Custom Programming

It's not uncommon for companies to purchase an affordable off-the-shelf product and add custom features to achieve a higher ROI, rather than investing in a higher-end, more expensive EDM system. For example, you might require special features, such as numbering new files to match your own reserved numbering system, or you might want to force certain data fields to follow certain conventions.

One word of caution: don't over-engineer your system. You might think that you need a custom application, but discover that your EDM system does 80 to 90 percent of what you require right out of the box. Find out if your vendor has already created an application that is similar in scope to what you're looking for. Also remember to ask about the maintenance of any code so you won't be set back in time or money when a new version of the software comes out.

To find out more on implementing your EDM system, visit our website www.SynergisSoftware.com or call 800.836.5440 and ask to speak to an Account Manager.

Implementation Success Story:

Gillig Bus Manufacturer Drives Engineer Document Management Implementation in One Weekend

Jim McKittrick, CAD manager and Adept systems administrator at Gillig Corporation, the second largest producer of heavy-duty transit buses in North America, was charged with implementing the company's engineering document management system.

"We conducted an in-depth analysis of our business process and determined that Engineering, Accounting, Sales and Publications could all benefit from Adept. The Synergis Software Services Team helped us identify exactly what we needed to do. We leveraged Synergis' in-house Application Development Team to create a one-time customization of Adept, which included some of Synergis' existing off-the-shelf extensions, an automated part-numbering extension designed for the company's exacting specifications, and a 'Sign In Recorder' extension that easily imports data from Adept into other business systems such as ERP/MRP.

After training our users on a test Adept database, we migrated our data from another system, set up Adept, and got all the custom extensions running in just one weekend."

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