

The Complete Check List for Evaluating an Engineering Document Management System (EDMS)

Project Goals

- What are the issues your business and project team are facing that prompted the need for an EDMS solution? Here are some examples, but you may have more. Try ranking these from 1-10 for your organization. Then pick the top two challenges that will give you the most value, and focus on those for starters.
 - Secure technical data including, but not limited to, drawings, manuals, and maintenance information (not only from outside catastrophe, but also from user errors).
 - Versioning control and drawing archival to ensure crews have the most accurate drawing.
 - Automation of engineering processes.
 - Keep a complete history of critical documents.
 - Easily find drawings and documents associated with project numbers or locations.
 - Interdepartmental sharing of data across the entire company.
 - Allow remote project members or suppliers to collaborate seamlessly with the internal design team.
 - Work process efficiency improvements to reduce engineering time and minimize design issues.
 - Integration with other enterprise systems to link asset records with technical information.
 - Implement a system that will be easy to use and not adversely affect the way users do their job.

- Where will the solution be implemented? Start thinking right away if you intend to roll out the EDMS solution to additional departments or groups.
 - One workgroup
 - Multiple workgroups
 - A division
 - Enterprise-wide
 - Other geographic locations

- What is the Scope of your Initial EDMS Effort?
 - Is your effort focused on all legacy documents or on only those drawings that are in electronic format today?
 - Is your effort focused on only new/revised drawings going forward?

- Who will Use Your EDMS System?
 - How many drawing creators (users who create/update/delete drawings, check-in/check-out, manage versions) will use the solution?
 - How many consumers (find, view, print, redline, assign and copy documents) will use the solution?
 - How many workflow users (find, view, print, redline, assign and copy documents, plus approve, reject, re-route to a new workflow, and expedite approve and reject) will use the new solutions?

About Your Vendor Criteria

- How many vendors will be in your final evaluation?
 - How many are you planning to evaluate to get to that final number?
 - Do you have a specific timeframe for which a vendor’s proposal must be valid?
 - Do you have a specific schedule for accepting, reviewing, awarding and implementing a solution?

If you want to be thorough about what to look for in a vendor, refer to this document [“25 Questions to for Selecting a Vendor.”](#) If your vendor can deliver on 90% of these capabilities, they’re a likely top candidate for consideration.

What are Your Decision Criteria?

- Criteria you may want to consider, include:
 - Does the EDMS system match critical requirements?
 - Are there clear value-added capabilities in the system?
 - Does the proposal include financial terms and is cost competitive?
 - Are there specific capabilities and operational requirements?
 - Is the EDMS system proven with a Utility or in the energy industry?
 - Does the proposed system meet company’s implementation timelines?

Engineering Drawing Management System (EDMS) Requirements Summary

This is one of the most important sections of the checklist because it outlines ALL the possible requirements that your EDMS system could include. You can enhance this and add all your wish list items – even if you know that they won’t get implemented right away. Think BIG and scale back if you have to. Make sure you get a solution that solves your MOST URGENT issues quickly and easily.

Requirement	Priority (M)ust Have (D)esired (O)ptional	Describe how the solution meets the requirement.	Any comments or concerns?
Document Management Requirements			
Check In / Check Out			
Centralized Document Access (or “One Version of the Truth”)			
Searching <ul style="list-style-type: none"> • Full Text and Structured Search • Search by Metadata • Search by Views • Search by Favorites 			
Version Control with a complete audit trail <ul style="list-style-type: none"> • Supports Minor/Major Versions • Ability to Review Previous Version(s) • Ability to Restore Previous Version(s) 			
Audit Trail <ul style="list-style-type: none"> • Offers audit trail reporting • Tracks the actions you need for your industry compliance 			

Requirement	Priority (M)ust Have (D)esired (O)ptional	Describe how the solution meets the requirement.	Any comments or concerns?
Automated File Naming <ul style="list-style-type: none"> • Supports standard naming convention • Automates file naming 			
Flexible Data Views <ul style="list-style-type: none"> • Track whatever information is important to you about your files • Leverage metadata to find files fast • Create different metadata views for different groups of users • Customize column sets based on the types of documents 			
Attribute & Property Linking <ul style="list-style-type: none"> • Provides bi-directional link to attributes or properties to CAD or Office documents • Automatic extraction of attribute, property or tag information 			
File Relationship Management <ul style="list-style-type: none"> • Automatically manage parent/child relationships in CAD applications • Shows where-used relationships • Creates relationships between any types of documents 			
Batch Publishing & Printing <ul style="list-style-type: none"> • Automatically create PDF on approval or revision • Create PDF renditions on demand • Watched folders on the network 			
Visualization <ul style="list-style-type: none"> • Native file visualization • Centralized viewing solution for 100's of formats • Layers • Watermarks • Redlining that integrates with the DM solution • Multi-user redlining 			
Workflow <ul style="list-style-type: none"> • Assign review and/or approval tasks. • Ability to assign review and/or approval tasks to an individual or a group. • Email notification 			
Transmit / Distribute Drawings <ul style="list-style-type: none"> • Transmit or distribute a drawing to an individual or group • Transmit or distribute a drawing on demand or via an automated process • Transmittal Templates 			
System Architecture <ul style="list-style-type: none"> • Ability to have remote vaults • Disaster Recovery 			

Requirement	Priority (M)ust Have (D)esired (O)ptional	Describe how the solution meets the requirement.	Any comments or concerns?
<ul style="list-style-type: none"> Replicated Vaults Hybrid Vaults 			
Access Rights <ul style="list-style-type: none"> Integrate with Active Directory Permissions for Individuals and Groups 			
Security <ul style="list-style-type: none"> Vaulting Replication Disaster Recovery 			
System Design <ul style="list-style-type: none"> Is it rigid or flexible? Are you able to change column sets? What about adding fields (what types of fields)? 			
Legacy Document and Data Import <ul style="list-style-type: none"> Easily scan and synch files into the system Ability to import data from other databases or an Excel Spreadsheet Ability to import data from other systems 			
Interoperability <ul style="list-style-type: none"> Can the system integrate with other Business Systems? Does the system have an API available and is it included with the base system? 			
CAD and MS Office Integration <ul style="list-style-type: none"> What CAD applications does it support? Does it support integration with MS Word, Excel, PDF and Outlook email? 			
What are the Supported File Types? <ul style="list-style-type: none"> List all the file types you need the system to support (This varies for every organization) 			