An Illustrated Guide to Engineering Document Management Sanity
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CHAPTER ONE

Move Your Company Toward Engineering Document Management Sanity

You admit you are powerless over your documents and files “that your work has become unmanageable.”

For a lot of companies, this is where the “recovery” process stalls. If all you’ve done so far, is “admit you have a problem”, it’s ok. You’re just like a lot of our clients were just a few months ago. Taking the next step can be difficult...

You have fires to put out every day, distracting you from focusing on long-term improvements
Proving ROI to get budget approval can be an arduous process in any company
Users dislike change, even when it will make their lives easier, cut costs and boost profitability

ARE YOU IN DENIAL?

For all these reasons, even companies with chronic document management “insanity”, will back-burner their document management projects for months and even years.

Here’s what we hear every day: “Well, it’s broken. Badly broken. But we’re getting by. I guess we can get by for another year.”

That kind of “denial” may have been OK when the economy was roaring, but now?

IN THIS ECONOMY, DENIAL IS DEADLY

In this economy, every company needs to take a hard look at issues of “denial” and stare them down. See them for what they are: a deadly state of mind that weakens your competitive position and can take you down before you even are aware of the damage that’s occurring.

That’s why we’ve created “The Road to Engineering Document Management Sanity”: an illustrated guide.
Through:

- Case studies with real, hard numbers and ROI examples
- Metrics that will open budgetary doors
- Short interviews with real document management “champions” showing how they got the job done at their company
- Best practices white papers where you’ll discover how to avoid the pitfalls and smooth your road

and other fact-filled examples, this series will lead you down the road to document management sanity. It will clarify exactly how you can get from HERE to THERE without you losing your mind. And get your company out of “denial”.

If you are serious about moving your company toward document management sanity, keep reading.
Who’s Walking Out With Your Secrets?

I don’t have to tell you that competition is at an all time high.

When the economy is in the dumps like it is now, companies start scrambling for any competitive advantage they can find.

And the unethical ones will stop at nothing to get it. In fact, unethical behavior at one of our customer’s facilities, is one of the reasons Synergis Sofware and Adept were born. A customer came to us after being JOLTED out of document management denial...

A Quick Story of Shady Behavior

In 1989, one of our first clients came to us with a big problem. A disgruntled employee had waltzed out the door with electronic copies of top secret designs and went to work for a competitor.

“We knew we had a security problem, but we always thought that everyone was happy. We never once thought that someone in our company would stoop so low. But it really was our fault. We should have done more to protect our files.”

Ouch. That’s a tough way to learn that you need document management. But sometimes it’s only after a nightmare scenario that a company wakes up to the benefit of document management.

We’re probably not telling you anything you don’t know, but Windows file security ...well, it stinks. Even 21 years after the incident above, you do NOT WANT TO TRUST YOUR DOCUMENT SECURITY to Windows. Why, because with Windows...

• You can’t find a file if you’re not sure of the file name or location
• You can’t tell if someone else in the organization is working on a file
• You can’t maintain file management standards
• You can’t control file revisions
• You can’t maintain a document audit trail to achieve compliance
• You can’t maintain relationships among files
• You can’t reuse design data efficiently
• You can’t collaborate across multiple sites
• You can’t automate workflow and approvals

The road to document security sanity

In the first few minutes of our presentation “12 Engineering Document Management Problems You Can Solve in 3 Weeks” we show you a way you can LOCK down your proprietary documents while still allowing AUTHORIZED personnel easy access to the documents they need to be productive.

To view the first five minutes of this powerful video, visit our website at:
http://www.synergissoftware.com/road-to-sanity
Do You Believe in a Document Management “Higher Power”? 

Don’t worry, we’re not going to address theological issues. We’re still talking about engineering document management here. But as we mentioned, most companies we serve have no difficulty admitting they need a “higher power” to help them. Most companies know that they can’t solve their document management issues without outside, expert help.

So what’s the bottleneck? Justification and Budget.

“We know we have a problem, we just can’t convince management to spend the money needed to fix it.”

Which brings up another story...

During the late 80s, a client who used AutoCAD for machine design called us in a panic. The company had just built a $250K prototype of a paper machine from the wrong revision of a drawing. In those early days of PCs, we couldn’t find any off-the-shelf solution for document control, so we ended up programming a DOS-BASED document management program to run with AutoCAD 2.0 on a Novell network. The client loved the solution and we saw an opportunity. So began our 20 year journey with document management.

They called in the “higher power” and problem was solved. And what an easy justification! In this economy, how many $250,000 blunders can a company endure?
When is the best time to pull in an expert?

Now, you may not be ready to bring in an expert at this point. But your next step toward engineering document management sanity is to educate yourself a bit. Do some research. Some homework. Why? Because the justification for getting budgeting approval to move your document management initiative forward will become very obvious once you start down that road.

A good first step is to view an online demonstration.

From this brief demo you’ll discover:

- How intuitive a document management system can be.
- How much faster you’ll find files using document management than using Windows...cutting hours of wasted time from your workflow.
- How easy it is to set up document security using a simple drag and drop interface.
- How to know for sure you have “the latest copy” with revision control. No $250,000 mistakes!
- How to edit or copy 2D or 3D CAD files and keep all relationships intact.

Once you have a good feel for the product and you think it’s a fit, then you’ll know that the next step is to call in an expert for a more thorough diagnosis of your document management insanity.

To view an online demonstration, visit our website at:
http://www.synergissoftware.com/road-to-sanity
Lift Your Head Above the Trees

Have you ever heard this expression...

“We can’t see the forest for all the trees”

It’s one of my favorites. And it has to do with perspective. Sometimes it’s hard to realize exactly where you are when all you can see is what’s right in front of you.

We all get so bogged down with the day-to-day details of business that we often lose sight of big picture goals and vision.

To use another “tree” analogy: It’s like we’re hacking our way through a jungle. We spend all our time swinging our machete, focused intently on the next vine that needs to be cut through.

But sometimes we need to climb to the top of the tallest tree in the jungle and look around. Why? Because when we get to the top, we may realize, “Oops, wrong jungle!”

Climb the Tree and Look Around for Greater Sanity

After immersing himself in white papers, product brochures, and videos, our client Phil F. went to visit an existing customer before making a final decision on Adept for engineering document management. It was during that site visit that he realized Adept’s full potential.

“I was very impressed by how easy Adept was to use. But what really amazed me was how this company was able to integrate Adept throughout all their different departments. They literally had every single document — from the design phase; to the engineering phase; to the creation phase through manufacturing, plus shipping and technical manuals — all managed and tracked in Adept.”

He (physically) lifted himself out of his own jungle and looked around...and found cleared paths, new ideas, new visions.
A crucial step to engineering document management sanity is taking a look at other companies in your industry who have SOARED beyond the problems your company is facing.

You can't get a good picture of what the future could and SHOULD look like if you're always hip-deep in your company's day to day operations.

All you'll ever see is the trees and you'll miss the forest.

So, your next step to document engineering sanity is to study other companies in your industry. Benchmark. Learn. Set your sights above the trees so you can be confident knowing that if others got out of the forest then you can, too.

What's the Easiest Way to "Lift Your Head Above the Trees"?

• Case studies are a great way to quickly see how companies like yours have solved their document management problems.
• Case studies can not only help you see how your problems can be solved, but can also give you insight into how to move your engineering document management initiative forward.

Read a case study from your industry:

When you're serious about making a purchase, we're happy to give you references to call or visit. But if you're not at that stage, you'll still benefit from reading through a case study from your industry.
What Does Einstein Have to Do With Document Management?

One day Albert Einstein and an assistant were searching for a paper clip to bind together a newly-finished physics paper. They soon found one but it was too badly bent to be used.

They began searching for a tool to straighten it out when they came across...a large box of paper clips.

Incredibly, Einstein opened the box, removed a new clip and promptly began to shape it a tool to straighten the bent clip!

His assistant, considerably puzzled, asked him why he was bothering to do this.

“Once I am set on a goal,” Einstein replied, “it becomes difficult to deflect me.”

Albert Einstein was a big picture guy. To say the least. Lost in thoughts about how the universe works, he was occasionally impractical when it came to smaller details. He often forgot to do the most rudimentary daily tasks.

What Does Einstein Have to Do with Your Engineering Document Management?

When it comes to moving your document management initiative forward, SOMEONE has to know the nuts and bolts. The details. And it should be someone in YOUR company. Do your homework before you speak to a vendor. A good vendor will have all these nuts & bolts down pat, but it will help if you have a vocabulary to describe YOUR company’s nuts & bolts.
Lack of NUTS & BOLTS knowledge can bring an engineering document management initiative to a standstill.

One common problem is not having all the right people involved in the evaluation process. For example, IT people need to know what the network requirements are for their database (MS SQL or Oracle) or their servers.

ALL the right people need to be on the same page.

One great way to overcome this issue is to form an inter-departmental problem solving team so all the right people are in sync about making decisions about the document management solution they need.

Until then, we’ve prepared a free guide: Document Management Nuts & Bolts

In this short guide, you’ll get a whirlwind tour of everything you need to know about the technical requirements for selecting a document management system.

And it’s free. Read it or have your “nuts and bolts” person read it and you’ll be able to move your engineering document management initiative down the road.

Visit our website to get your free guide:
http://www.synergissoftware.com/road-to-sanity
How to Control Your Data Instead of Your Data Controlling You

“Just ignore your health and it will go away”.

“We had situations where we had two files and ordered castings from the old drawing and suffered the immediate cost associated. But with PDM, we are not seeing problems like that anymore. - Brian Walsh, IT Manager, SchuF-Fetterolf

Whether it’s your health, your finances, your home, your relationships, or any situation where problems might arise, if you ignore the problems, something disturbing starts to happen.

If you don’t control the problem, the problem starts to control you.

Take your health for instance. For the most part, you have control over your health when you’re young. You can choose to eat right and exercise and you maintain control. You’re in charge.

But if you ignore your health, over time, your health starts to control you. As you age, you become more susceptible to disease than your healthier peers. You spend more money on prescription medication, insurance and doctor’s visits. You lose more time to hospital stays and visiting doctors. You lose money. You lose time. You lose freedom. You lose control.

What does this have to do with document management?

In previous chapters we’ve mentioned how a lack of proper document management solutions can lead to some very serious, profit-slashing issues.

• One company sat helplessly by as an employee stole design documents and took them to a competitor.
• Another wasted $250,000 on a production run for the WRONG part...and had no way to prevent it from happening again!

In both instances and countless others we’ve heard, the data problems start to control the organization, not the other way around.
Just like the unhealthy adult who loses control over his body, these companies lost control over their time and profits.

How to Control Your Data Instead of Your Data Controlling You

As with your personal health, the way to start is by asking some tough questions. “Do I eat right?” “Do I exercise enough” etc.

The 12 questions below come from our presentation “12 Engineering Document Management Problems You Can Solve in 3 Weeks”. They strike right at the heart of 99% of the document management dysfunction we observe.

- Ask yourself the 12 questions
- Watch the video
- Note any red flags that come up
- Write down the red flags and prioritize them

This is your “battle plan” for marching toward document management sanity.

TWELVE QUESTIONS for Gaining Control of Your Data

1. Do we lack document security and granular access control?
2. Can we always find our files IMMEDIATELY?
3. Can we control revisions effectively?
4. Do we lack an audit trail for documents throughout their life cycle?
5. Is our engineering change process costly, inefficient and prone to error?
6. Is it difficult to share and collaborate with other departments, sites & contractors?
7. Is creating transmittals time consuming and are they hard to manage?
8. Can non-CAD users not view, print, markup and compare CAD files?
9. Do we lack a thorough, integrated data management for AutoCAD & Autodesk Inventor?
10. Are our file naming conventions a mess with no way to enforce standards?
11. Are important email communications not centrally managed with other project files?
12. Are we incapable of providing automated or on-demand batch printing or publishing?

To view your presentation, visit our website at:
http://www.synergissoftware.com/road-to-sanity
In his white paper “The Role of Product Data Management in Improving Engineering Efficiency” (available for free here), Jim Brown, President of Tech-Clarity.com, shows how the most forward-looking engineering firms are using data management software to compete more aggressively for shrinking sales volume in this down economy.

Among the examples he sites, are...

- How one company uses PDM to slash new product introduction rate to 1/4 the industry average
- How another uses PDM to allow globally distributed engineering groups to collaborate and leverage resources across locations
- How one firm implemented PDM and streamlined communications, cutting out wasteful, non-value added steps.
- How another eliminated costly errors from ordering castings from the wrong drawings.

A well-planned PDM strategy is essential to cut out waste and leverage resources to compete in today’s lean and unforgiving economy.

But, what do they ALL have in common?

Near the end of the paper, he writes...

The companies interviewed for this paper all indicated that they found additional uses for PDM beyond their initial needs and expectations, proving that PDM is a valuable and extensible foundation to an engineering software strategy.
“Now, different departments - even Accounting - are using PDM. It is not purely in design anymore. Commercial things like project calculations and quality documents like nonconformance reports are in there. We even store invoices and purchase orders to vendors. Because all of the information in PDM is searchable and accessible, people outside of engineering are able to access design and related information throughout the product lifecycle.”

-Christoph Kehrs, Director of Sales, SchuF-Fetterolf.

It's possible to justify your PDM initiative simply by answering the 12 tough questions we presented in the previous email, but to really push your initiative forward, follow the lead of the company's who are getting the most out of PDM.

One way to start is to send the list of 12 questions to other department heads to get them thinking about how PDM can benefit their departments as well. As departments begin to jump on the PDM bandwagon, your initiative will pick up speed and take on a life of its own.

Read the white paper here:
http://www.synergissoftware.com/road-to-sanity
Your Dream Team & the Game Plan

Homeshield, a company known for their ultra-high performance integrated door thresholds, window and door screens, and related products, wanted to improve quality and time to market.

When they face any business challenge, Homeshield applies strategic problem solving as a mechanism for change and process improvement. They organize a problem solving TEAM and map out the game plan.

For this particular problem they first assembled a dream team of department heads from not just Engineering, but also

- Quality Assurance
- IT
- Customer Service
- Human Resources
- Purchasing
- Scheduling

and other staff to improve engineering processes and to steer the companyís adoption of new technology using Lean and Six Sigma methods and strategies.

As mentioned in our last chapter, looking outside engineering is a great way to move your engineering document management initiative forward FAST—even in a down economy. The ROI becomes that much attractive when multiple departments realize savings from the implementation.
The Game Plan (One year ROI even in a Down Economy)

Here’s Homeshield’s advice to your team...

“Look at what you are doing; map it out; figure out where you want to get to and try to define your process as best you can before you move into a system,” states Jeff Sawyer, engineering manager. “If you don’t know where you want to go, there’s not a system in the world that will help you. The more defined you are when you start—even though it will be a lot of work—the easier it will be to get where you are going.”

“We went through a process map of how things flow,” explains Sawyers. “We looked at the time it took to copy papers and specifications; control them through a matrix; and walk out on the floor and put them in books. That, plus our supervisors were spending a lot of time on custom orders from clients who wanted a wide range of components in different sizes and colors. We simply did a Lean, Kaizen-type exercise and determined our flow and how many hours per year we could save if we did it electronically.”

The group agreed they could justify a document management system within a year’s time and green lighted the project.

In fact, they found that a slow business climate gave them the time to thoroughly evaluate their needs, select and implement an appropriate solution. Had they waited until “the economy picks back up” they might have been too busy to implement such a thorough (but necessary) problem-solving process to this issue. And would have been in a less competitive stance than they are now.

The bottom line? Business is up.

Not only did Homeshield eliminate wasteful processes, save time and regain control over their data—as every company experiences with a proper engineering document management strategy—but they also noticed an additional benefit.

“We’re providing better service to our internal and external customers because we don’t have to chase down information. Our productivity is up and so is business.”

A great team + a great plan = a strategy and higher profits
Even in this economy.
ESPECIALLY in this economy.

Read the full Homeshield Case Study here:
http://www.synergissoftware.com/road-to-sanity
25 Questions for Selecting a Vendor

Eventually, every document management decision making process gets to the vendor selection phase.

And while there are many solid, qualified companies out there providing excellent document management solutions, there’s probably one that is best suited for your particular situation.

We’d like to help with this phase, but if we just provided you with the criteria that we at Synergis Software think are important, well, you might think we had slanted the criteria to our favor.

So, here’s what we’ve done: We read through several online document management forums that addressed the question of selecting a vendor. From our research, we put together a composite list of 25 questions that a prospective document management buyer could ask a vendor during the evaluation process.

We cleaned it up, put it in handy PDF format for easy printing and reference and even put it in spreadsheet form for you to use in evaluating vendors.

If you’d like either or both of these checklists, just visit our website:
http://www.synergissoftware.com/road-to-sanity
A Meeting of the Minds

If you’ve made it this far in the series and you’re still reading and tracking with us, your next step would be to schedule a customized, personalized demonstration of Adept software.

But we only offer this demo to customers who qualify, as we personalize the demo to address your needs and requirements.

Do you qualify?

• You’ve already met one qualification by reading our series to this point. It tells us that you are genuinely interested in solving a legitimate business issue through engineering document management.
• The other step is to fill out our survey here. This survey take approximately 8-11 minutes to complete, but it helps our experts prepare the demonstration so that every minute of the demo is packed with information that is relevant to your situation.

What we accomplish in this private demonstration is:

• We learn about your needs and requirements from A to Z
• We better understand your criteria for selecting software and a vendor
• You get a comprehensive demo based on your driving challenges and the features you want to go deep on – a presentation that is NOT available on our web site demo center
• An interactive dialog with the key stakeholders of your engineering document management initiative
The presentation is conducted by one of our Synergis Software Account Managers, all of whom have over 10 years’ experience in the engineering document management industry and has partnered with SMBs as well as Fortune 100 companies. We do it over the web to accommodate one or many stakeholders at one or multiple locations.

Please be assured that this consultation will not be a thinly disguised sales presentation; it will consist of the best intelligence, Chris Fabri, Director of Engineering Solutions can supply in a 30-60 minute time span. There is no charge for the demonstration.

To secure a time for this consultation, we will contact you with 3-5 days after you submit your survey to schedule a time that is convenient for you.

Take our short survey:
http://www.surveymonkey.com/s/Z8TDWXG
Are You Our Best Customer?

If you’ve made it to this point in our series, chances are very good that your company is a good fit for Adept.

Did that sound backward? We don’t mean to offend, but we like to know as much as possible about you and your initiative. It’s one of the reasons we don’t “pitch” much in this illustrated guide. We like to tell you about what’s important to us, what we feel should be important to you and then see if we’re a good fit. If we’re not that’s ok.

But if you’re still reading, we probably are. We’ve looked very closely at our “Best Customer Profile”. Answer the following questions and let us know if it’s like “looking in a mirror”.

- Do you consider yourself a champion for positive change in your organization?
- Do you consider up-front training for admins and users to be critical to the success of any software initiative?
- Do you believe that engineering document management should solve more than only engineering problems?
- Do you consider yourself savvy (maybe even a little obsessive) about automating manual processes?
- Do you believe you can make a commitment and take ownership of the project?
- Do you understand technology and how to manipulate the technology to meet their needs
- Do you see us as an extension of your team?
- Do you consider yourself a forward thinker with the ability to look at the longer term picture and has a vision of “what could be”

If you were nodding your head while reading that list, there is a very good chance that you would be one of our best customers as well.

To find out for sure, just fill out our brief survey:

http://www.surveymonkey.com/s/Z8TDWXG
CHAPTER TWELVE

This is Your Final Destination

In the last chapter we painted a portrait of our best customer. We asked you to answer a few questions and see if answering them made you feel like you were looking in a mirror.

In our final message in this guide, we’re going to turn it around. Here are the 7 reasons that most of our best customers give for selecting us as their engineering document management vendor.

The Top 7 Reasons Our Best Customers Select Us

1. **Our Unique Vaulting Method** - Adept’s vaulting methodology is unique in that it provides the security and control you need without encrypting or scrambling your folder structure or filenames, and without importing your documents into the database itself.

2. **Excellent Multi-CAD Support** – Adept is CAD independent, with excellent, very deep integration with all three products, SolidWorks, Inventor and AutoCAD.

3. **The Best Engineering Viewer on the Market** - Adept includes Oracle’s AutoVue 3D Professional (a $1700 value) with each license of Adept Desktop and Adept Explorer (web client).

4. **Easy and Fast Transmittal Capabilities** - Adept’s Transmittal Automation feature makes the process of creating, sending, and tracking transmittals easy and fast, and reduces the chance of errors compared to paper-based transmittal processes.

5. **Flexible Workflow Capabilities and ease of configuration** – Adept offers very flexible workflow capabilities. Clients who have compared Adept to other solutions have told us Adept is much easier to configure to their needs.

6. **Comfortable User Experience** – Adept’s user interface is subjective, however many clients have told us they like the Adept interface better. The best way to discover if it is right for you is to sign up for a free demo.

7. **Developer-Direct implementation and support** – At Synergis Software, we are completely focused on developing, implementing and supporting Adept document management and workflow software.
Here’s a handy “cheat sheet” that goes into more details about these and other reasons why clients choose us.

Visit our website to download:
http://www.synergissoftware.com/road-to-sanity

If these reasons resonate with you - if the answers to the questions in the previous message made you nod your head - you’re closer than ever to your final destination.

If there are any other questions you might have, now’s the time to pick up the phone (800-836.5440 or 215.529.9900) and speak to one of our document management experts.

These folks have 10+ years of experience and will coach you WHEREVER you are on the road to document management sanity. They’ve guided hundreds of people, just like you, down the road to document management sanity to a place that feels like home sweet home.

To Your Document Management Sanity!