



THE BUYER'S GUIDE FOR ENGINEERING DOCUMENT MANAGEMENT SOLUTIONS

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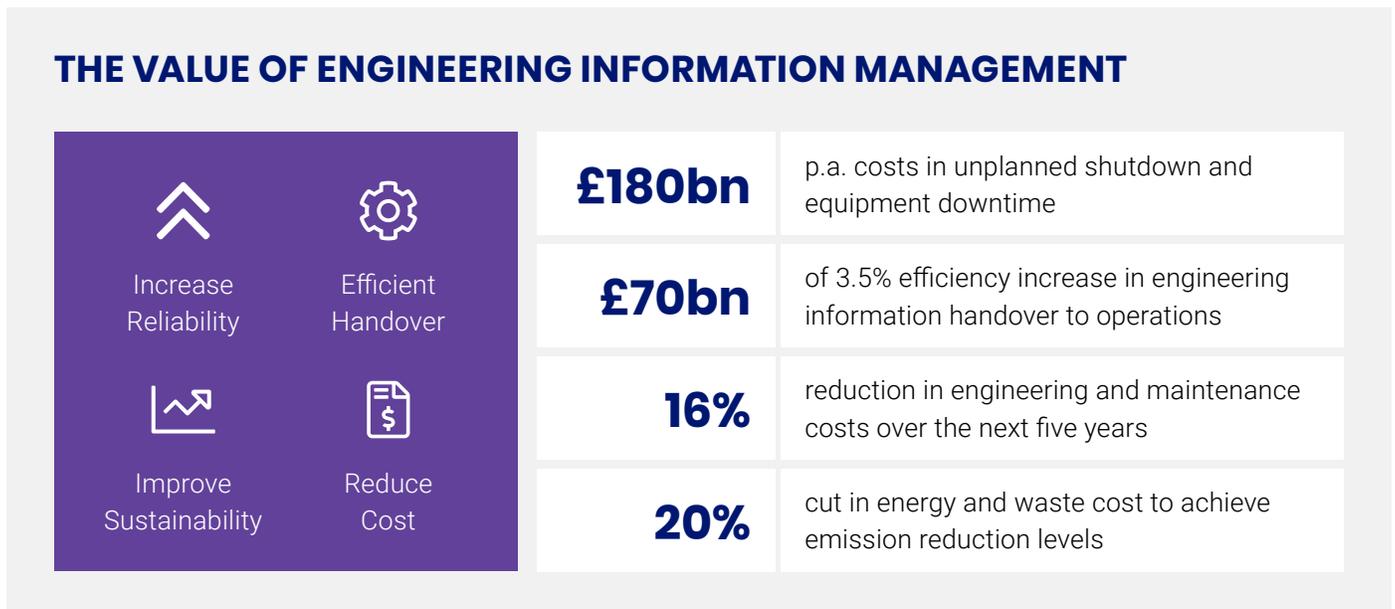
INTRODUCTION

If you're here, it's likely because you know your engineering organization has a sizable hurdle to jump over: managing documents across job sites, facilities and projects. You know the importance of staying on top of documentation, from safety to compliance to operational efficiency. This is why an engineering document management system (EDMS) is often a necessity. One with a centralized, secure, scalable and highly accessible repository for all engineering documentation.

Far too often, engineering documents end up incomplete, inaccessible or out-of-date. And when that happens, confusion and inefficiencies ensue. Without the right EDMS solution (or one at all), you're probably feeling the strain in daily operations. Teams may struggle with access and version control, leading to confusion over which document is the "right" one. Updates can get buried easily, meaning employees are working from outdated or inaccurate information. Even when the right documents exist, sharing them broadly and securely with all stakeholders in a project presents yet another barrier. Workarounds simply won't cut it, and you'll find yourself with unplanned outages, costly downtime and potential safety hazards and accidents.

An EDMS helps you:

- Gain efficiency in engineering projects
- Consolidate mission-critical engineering information
- Break down information silos to ensure safety
- Adhere to regulatory compliance mandates
- Take control of hazardous areas



At this point, you know the question is no longer "Do I need an EDMS?" Now it's "Where do I start?" With so many solutions on the market, making the right choice can feel overwhelming.

Whether you are considering replacing an existing solution or need to implement one for the first time, this guide serves to deepen your understanding of what to look for when evaluating an EDMS. Explore how to build your business case and considerations to help you find the right solution and vendor partner for your unique business needs and budget.



THE STARTING LINE: BUILD A BUSINESS CASE AND ESTABLISH ROI

Before we dive into vendor and platform considerations, let's talk about securing buy-in. Key stakeholders, including Maintenance, IT and Finance, each bring distinct priorities to the table when evaluating technology investments. To streamline the process, start by capturing the needs of each department in a comprehensive requirements document. You need to be able to show more than efficiency gains. You must connect daily operational pain points to measurable financial impact for the organization. Starting with a strong business case shows how you can use the technology to eliminate bottlenecks, errors and risks, plus how that would then translate to cost savings, faster delivery and long-term scale and market differentiation.

QUANTIFY THE VALUE OF AN EDMS SOLUTION

You know that every misfiled drawing, missed approval or compliance slip carries a price. An EDMS helps to reduce these errors, so you avoid costly reworks, accelerate approvals to shorten project timelines and maintain audit-ready records to minimize the potential for fines or failed inspections.

It will be important to show where your current organization stands on these challenges, what those metrics are and what metrics you could achieve with an EDMS. Decision makers will trust data that reflects reality for your organization, so tie outcomes directly to bottom-line results. For example:



Track the number of hours engineers and project managers spend searching for files



Give estimates on the cost of reworks due to outdated information



Quantify delays from manual review processes



Identify potential costs from missed deadlines or compliance fines

Turning everyday frustrations and barriers into hard numbers reinforces how you can use an EDMS to support organizational goals and achieve credible ROI.

PRESENT EXPECTED ROI TO DECISION MAKERS

Getting buy-in means showing impact in business terms. This means dollars saved, risk avoided and productivity gained. Set a clear ROI story with metrics charts and case studies to show how efficiency numbers can lead to financial outcomes.

An EDMS solution must be positioned as far more than a software purchase that solves only an immediate challenge. It needs to be shown as a strategic investment that safeguards future revenue, reduces liability and ensures focus on value-add work versus document chasing. To make the ask resonate across the decision-making group, you need to show them how the investment would bridge operational pain and financial priorities right now and over time.

ON AVERAGE, AMERICAN EMPLOYEES ARE SPENDING 25% OF THE WORKWEEK SEARCHING FOR DOCUMENTS.¹



THE FIRST CURVE: WHAT TO CONSIDER WHEN EVALUATING EDMS SOLUTIONS AND VENDOR PARTNERS

With organizational buy-in, you now need to secure a comprehensive EDMS where all necessary contributors and stakeholders can easily store, manage, render and visualize engineering documents and files. Identifying the right partner with the right technology can help.

¹https://get.glean.com/rs/626-JWX-444/images/2022_Hybrid-workplace-habits-hangups_Glean-report.pdf

CONSIDERATIONS FOR ASSESSING EDMS SOFTWARE SOLUTIONS

NEED	WHY IT'S IMPORTANT	QUESTIONS TO CONSIDER
Centralized Repository	Having a single source of truth for all documents helps break down silos, address productivity pain points and maintain stakeholder ownership.	<ul style="list-style-type: none"> <input type="checkbox"/> Does the solution provide secure, centralized document storage that is easily searchable and uses metadata tags? <input type="checkbox"/> Are there robust version control options to ensure document accuracy?
Workflow Collaboration	You need to be able to collaborate with various teams, on-site crews and third-party vendors no matter where each person is located/based.	<ul style="list-style-type: none"> <input type="checkbox"/> Can you conduct parallel reviews and approvals? <input type="checkbox"/> Are there robust version control options to ensure document accuracy? <input type="checkbox"/> Would you have full visibility into all engineering changes as each one moves through the system? <input type="checkbox"/> Are there capabilities for mobile and offline accessibility that can handle field access, markups and offline modes? <input type="checkbox"/> Are you able to seamlessly collaborate with external contractors, including full audit logs of all actions and automatic validation of file references?
Governance and Compliance	As industry regulations continue to evolve and increase, it's critical to stay ahead of compliance needs, especially in heavily regulated industries where structured processes are needed.	<ul style="list-style-type: none"> <input type="checkbox"/> Does the system have role-based permissions and audit trails that account for industry-specific standards? <input type="checkbox"/> Are there features such as a controlled platform with tested change management procedures to ensure all proposed changes are fully documented?
Ease of Use and User Interface	Each project has different stakeholders and contributors, so it's necessary that tech be easy for all to use without the need for extensive IT involvement.	<ul style="list-style-type: none"> <input type="checkbox"/> Are workflows and dashboards easy to use with clear navigation that all can understand regardless of tech savvy? <input type="checkbox"/> Does the system have automatic naming conventions and tools for linking documents, so your teams don't have to do this manually?
Integration and Interoperability	When adding to an existing tech stack it's key to implement solutions that can easily integrate and operate with the tools you have as seamless data exchanges drive greater ROI and efficiency.	<ul style="list-style-type: none"> <input type="checkbox"/> Is the system able to seamlessly integrate with other systems like your enterprise resource planning (ERP), enterprise asset management (EAM), geographic information systems (GIS) and computer-aided design (CAD)? <input type="checkbox"/> Does the EDMS offer open APIs?
Scalability	Any solution you choose needs to be able to align with your needs at any time. For example, whether you need an on-premises (on-prem) environment, a cloud-based option or a hybrid of the two.	<ul style="list-style-type: none"> <input type="checkbox"/> Based on your business needs, can the solution easily scale without disruption to workflows, support needs, system updates and integration with other tech solutions?
Total Cost of Ownership (TCO)	Several factors influence what an EDMS costs from licensing to deployment models to support fees. Assessing TCO should take into consideration what potential ROIs might look like from using the system over time.	<ul style="list-style-type: none"> <input type="checkbox"/> Are there available use cases and clear insight that show how TCO aligns with potential ROI? <input type="checkbox"/> Do you have transparency into all costs that will be involved in standing up a new solution?

CONSIDERATIONS WHEN ASSESSING AN EDMS VENDOR PARTNER

NEED	WHY IT'S IMPORTANT	QUESTIONS TO CONSIDER
Customer References	Anytime you're assessing a new tech partnership, it's always important to check references. This shows that a potential vendor partner can truly walk the walk with their solution and has the industry experience you're looking for.	<ul style="list-style-type: none"> <input type="checkbox"/> Does the service provider have recent case studies (within the last two to three years) showing measurable results that align to your needs? <input type="checkbox"/> Are there testimonials and user reviews available in public forums for you to read through?
Trials and Demos	First-hand knowledge is invaluable and "try before you buy" is a major part of the search for new technology solutions.	<ul style="list-style-type: none"> <input type="checkbox"/> Can you get an in-depth demonstration where you can ask critical questions live? <input type="checkbox"/> Are there any options for free or reduced trial periods, so you can test out the system and understand any strengths or weaknesses before making a contract commitment?
Pricing Models	This is a critically important consideration as it ties directly to your budget needs and plays heavily into whether a solution can be the right fit to meet your needs.	<ul style="list-style-type: none"> <input type="checkbox"/> Does the service provider have various pricing models to choose from such as subscriptions, perpetual licensing and user-based or usage-based models? <input type="checkbox"/> Are there other services or modules you need that could incur extra costs from the vendor?
Training and Support	Comprehensive training for each person that needs to use the system ensures continuity and avoids delays that are often brought on by new platform learning curves.	<ul style="list-style-type: none"> <input type="checkbox"/> Is there step-by-step training offered to help users get set up and become familiar with the interface? <input type="checkbox"/> Are there support resources included for after implementation such as ongoing customer success management? <input type="checkbox"/> Does the vendor have local partnerships in your area that can provide in-person support following implementation?

THE FINAL LAP: UNDERSTANDING ACCRUENT EDMS

For many businesses in the engineering industry, a hybrid EDMS environment may be the best choice as some data and information needs to be kept on premises due to regulatory requirements for intellectual property and customer data protection. This is why Accruent offers both cloud-based (RedEye) and on-prem (Meridian) options – to fit your needs best.

ACCRUENT REDEYE

Cloud-native EDMS helps eliminate document management obstacles across an entire organization, no matter where your people are. A modern web solution, RedEye takes isolated and siloed information and transforms it into a competitive advantage. Offering unlimited users, GIS/GPS search and mobile, offline and field collaboration capabilities, RedEye helps reduce costs, maintain compliance and drive results.

RedEye is ideal for:

- **Large Internal Engineering Teams:** More control over sensitive design files and compliance requirements keeps data secure, even with large internal teams that span across departments. High-speed access to large CAD files and seamless integrations with internal workflows and legacy systems help to improve productivity and cut down on latency.
- **Asset-intensive Industries with Remote Worksites:** Real-time, secure access to the latest document versions from any location is crucial for dispersed and remote worksites. Its centralized cloud storage is always updated, supporting more seamless collaboration across teams while reducing IT overhead and ensuring data consistency and compliance.
- **External Contractors:** All external contractors can securely access, upload and collaborate on project files in real-time, no need for VPNs or on-prem infrastructure if it's not needed. You can streamline coordination across all parties involved both in and out of your company to eliminate version control issues, so everyone is working from the most up-to-date information.
- **Quick Deployment Needs:** Your organization can get up and running on a cloud-based system faster than on-premises, so for documents that aren't required to be stored on-prem, this is a win-win. Cloud EDMS is highly scalable and built to support quick access and fast onboarding, accelerating project timelines and ROI.

“Field teams and contractors can now complete work using the most recent version of engineering data and drawings from wherever they’re accessing the system.”

– Jared Rodley, Electrical Technical Specialist, Urban Utilities



ACCRUENT MERIDIAN

Get secure access to accurate asset information you can trust anywhere, anytime. With Meridian you and your teams can rest easy knowing the on-prem system's robust compliance capabilities, concurrent engineering support and deep integrations will all go to work for you.

Meridian is ideal for:

- **Complex Regulatory Environments:** Compliance with all industry regulations and business processes always stays up to date with comprehensive audit trails, connected workflows and easily searchable content and files. Get what you need to protect employees, facilities, product quality and to avoid fines and penalties.
- **Large Internal Engineering Teams:** Have more control over sensitive design files and compliance requirements, so data stays secure within your organization. You can also boost productivity and reduce latency with high-speed access to large CAD files and seamless integrations with internal workflows and legacy systems.
- **Formal Change Management Needs:** Entire teams will stay on track with access to up-to-date project data. Meridian makes it easy to keep master data up to date while you organize change processes in dedicated project areas. It allows you to create highly configurable workflows based on your organizational needs.

"Meridian provides us with the tools to maintain FDA 21 CFR Part 11 compliance and ensure current good manufacturing practices, resulting in reduced risks and more streamlined audits."

– Bill Eager, Drawing Management Senior Engineer, AbbVie



THE MERIDIAN AND REDEYE INTEGRATION

As an engineering professional, you're in a complex industry that likely requires a flexible EDMS approach to meet both security and accessibility needs. For data sovereignty and compliance, Meridian can give you peace of mind with deep compliance control to handle sensitive and classified documents. RedEye offers flexible field access and external collaboration on less-sensitive project files in real time, which can be equally important when faster project execution is needed.

Your engineering information spans across multiple teams and lifecycle phases which is often what leads to fragmented or outdated data. With Accruent EDMS you can bridge the full asset lifecycle, bringing Meridian's deep project and design-phase capabilities together with RedEye's operational and field-focused accessibility. This results in a trusted and connected flow of engineering data that can reduce errors, improve cross-collaboration and support more confident decision making

Using a hybrid EDMS environment helps you balance control with agility for lifecycle continuity, compliance and collaboration all in a single, unified platform. No matter your focus or goals, optimizing workflows across secure and distributed operations lets you maintain business continuity and resilience.

Want to know more about how Accruent can help you achieve ROI goals with its EDMS solutions? Connect with us [here](#).

ABOUT ACCRUENT

Accruent is a leading provider of solutions for Unifying the Built Environment™ – spanning real estate, physical and digital assets, and the integrated technology systems that connect and control them. Accruent continues to set new expectations for how organizations can use data to transform how they manage their facilities and assets. With U.S. headquarters in Austin, Texas.

Accruent serves over 5,000 customers in a wide range of industries in more than 100 countries worldwide.

SPEAK TO A SPECIALIST



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