

Engineering Document Management Profile & Usage

The objective of these questions is to assist in a high-level business definition as a starting point in providing a document management solution that meets user needs.

Company:	Engr. Contact person:
	Function:
Address:	Tel:
City/State:	E-mail:
Website:	
Main contact:	IT Contact person:
Tel:	Function:
E-mail:	Tel:

Core Business:			
Type of Business: (Utility, Mfg, Process, AEC)			
General market conditions:			
Company Division/Dept:			
Number Employees:			
Final Decision maker:			
Is Budget Available?			
Currently using EDM?			
How many Documents?			
Basic EDM Functions Req'd: Revision Control, Security, Viewing/Printing, Redlining, Workflow, Web Access, Title block links, X-ref Mgt, History, Archiving, Auditing, Collaboration. (Circle or BOLD all that apply)			
Number of expected initial EDM Users:			
Current IT Infrastructure- Computing Hdwe O/S:	# Workstations:	Network O/S:	
Type of e-mail system currently used:			

Management objectives (Circle, BOLD, highlight and/or Comment)

1. What are important developments in the Company's market to which it has to respond? For example:

<ul style="list-style-type: none"> <input type="checkbox"/> Technological innovations <input type="checkbox"/> Going abroad <input type="checkbox"/> Price pressure <input type="checkbox"/> Old plants that have to be renewed <input type="checkbox"/> Outsourcing 	<ul style="list-style-type: none"> <input type="checkbox"/> Government Influence <input type="checkbox"/> Environmental regulations <input type="checkbox"/> FDA rules <input type="checkbox"/> Privatizing <input type="checkbox"/> Other..
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2. What objectives are driving the introduction of an EDM product? For example:

<ul style="list-style-type: none"> • Organizational change • Improving processes (process control) • Improving efficiency • Innovation • Improving internal communication 	<ul style="list-style-type: none"> • Better information supply to external organizations • Continuity or assurance of the information supply (security for the future) • Reducing maintenance and control efforts • Other...
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3. What are the specific company 'Pains'? What are the main reasons for buying an EDM solution and which issue does the company want to solve first? (Explain)

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4. What's the impact of these Pains to other departments? Do you see a need to use data stored in EDM by other staff in your organization? (ie: purchasing, marketing)
5. What are the goals behind the EDM project?
 - Reduced Communication Time
 - Better Revision Control
 - Secured Change Process Needed
 - Process Knowledge Management
 - Organize Documents
 - Document Publication
 - ISO/OSI Standards
 - Government regulations
 - Product Life Cycle Mgt.
 - Product customization
6. When do you plan on implementing an EDM solution?

Solution Dynamics (Circle, BOLD, highlight and/or Comment)

7. Does the company have a formal approval/change process? – Does it need to be supported by EDM?
 - If not, does the department want to implement one in the near future?
 - If yes, is this just “common practice”, or part of an auditable quality system?
8. Are documents in a change process handled individually or as a group of multiple documents?
9. Do you have Internet/Intranet access widely available?

Solution Complexity (Circle, BOLD and/or Comment)

10. What other parties/locations should have access to rendered variant of the documents?
External Parties: (customers, etc.) Other Departments: Other Sites:
11. What other parties/locations should have read-only access to the actual documents?
External Parties: (customers, etc.) Other Departments: Other Sites:
12. Which of the following packages are currently used to create/modify documents
 - AutoCAD
 - AutoCAD MDT
 - AutoCAD ADT
 - AutoCAD Map
 - Inventor
 - SolidWorks
 - SolidEdge
 - Pro/E
 - Microstation
 - CADOOverlay
 - AutoPLANT
 - GTX/RasterCAD
 - OrCAD
 - Archibus
 - Microsoft Excel
 - Microsoft Word
 - Microsoft PowerPoint
 - Microsoft Access
 - Other:
13. With what other software applications (CRM, MRP, MSOffice, SAP, J. D. Edwards, etc) should EDM interface with and at what level of functionality.
 - Storing:
 - Storing and viewing:
 - Storing, viewing and information exchange between EDM and application:
14. What kind of legacy data needs to be imported into EDM solution? (Old custom EDM system, Workcenter, Motiva, WorkFlow, etc)
15. What document types need managing? Office, CAD, Photos, Database, Other?
16. Is there a company database standard that must be followed? Oracle, SQL, etc?

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