

ONBASE

CAD SERVICES

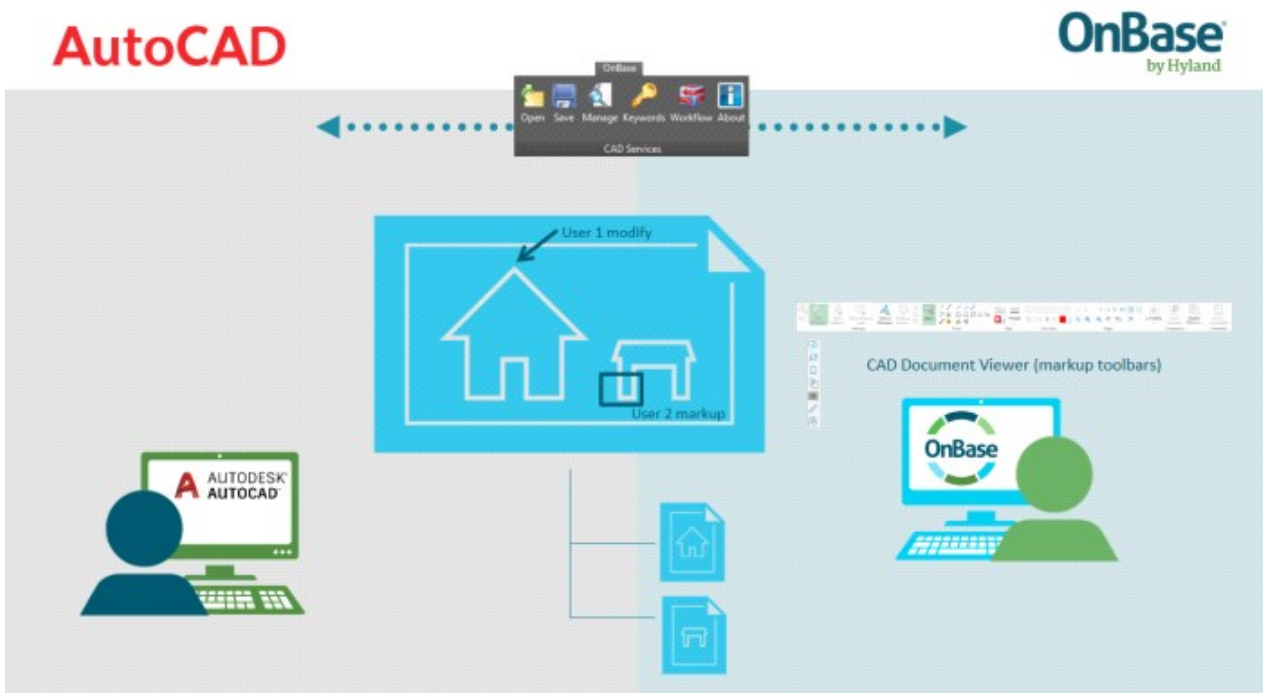
SUMMARY

CAD Services incorporates OnBase as the central repository for engineering files created in CAD software applications from Autodesk®. The direct integration allows the user to utilize OnBase to archive, retrieve and modify compound documents directly from the AutoCAD application. Users without CAD software are able to participate in the review process using the integrated CAD Viewer to markup, measure and compare drawings directly in OnBase. In addition to design management, OnBase provides a controlled process for change requests—from initial review to implementation. Native OnBase foldering, revision and Workflow capabilities extend the solution by connecting CAD files to related content and processes—providing file organization and an auditable history of all changes made and approval received.

BENEFITS

- **Enable centralized storage, granular security and consistent retention** for all documents within an organization, including CAD drawings.
- **Extend OnBase capabilities to CAD files**, including capture, search, folders, workflow and revisions (change management).
- **Minimize training and increase software adoption** by keeping AutoCAD users in the CAD application.
- **Reduce need for additional (and often pricey) CAD software licenses**, by providing a viewer for non-CAD users.
- **Provide remote, distributed access** to CAD documents via the Web, promoting multi-site collaboration.

DESIGN



From the “OnBase” tab within the AutoCAD application, users are able to create new drawings, save them directly into OnBase, manage revisions, access Workflow processes and more. CAD users can also search for and open existing CAD

drawings directly from OnBase, maintaining source control.

Unity Client users can then use the OnBase integrated CAD Viewer to markup and compare CAD drawings—both DWG and PDF files. This viewer enables users without CAD software to view drawings and collaborate in review processes.

(CAD Document Viewer (markup toolbar) for Unity shown above.)

APPLICATIONS

Manufacturing: Manufacturing organizations use CAD software to design new or update existing product specifications. These documents then need to be reviewed by both internal or external quality and engineering parties prior to production. CAD Services allows these documents to be stored in OnBase, cross-referenced to related content and routed through Workflow for approval. CAD Services not only reduces process cycle times, but allows users without CAD software to be involved in the process.

Healthcare: Hospital maintenance staff members use CAD Services to determine the location of building utilities such as oxygen lines and electrical panels. If there are issues that need troubleshooting, or new items need to be added, the staff member simply opens OnBase and retrieves the necessary data. Architectural drawings and other pertinent information, such as past maintenance records and specifications are presented to the user quickly and efficiently. Users can then zoom in, markup and annotate the drawings with the necessary information and save them directly in OnBase.

Property Management: Organizations with multiple locations use CAD Services to manage diagrams of their many properties. Even though they don't draft the documents themselves, they need to review and archive property drawings provided by architectural firms. Using the integrated CAD Viewer, users involved in the review process don't need the CAD software to view, markup or print the drawings.

KEY FEATURES

from the AutoCAD application:

Open, maintaining persistent checkout (lock) of multiple CAD files for edit, without the risk of overwriting work.

Save, automatically detect any xrefs (child documents) that are statically linked to the imported CAD drawing, maintaining compound document relationships.

Extract metadata from CAD drawing block attributes for automatic keyword indexing.

Launch Workflow layout as part of an engineering approval process, with ability to make decisions directly from AutoCAD.

from OnBase:

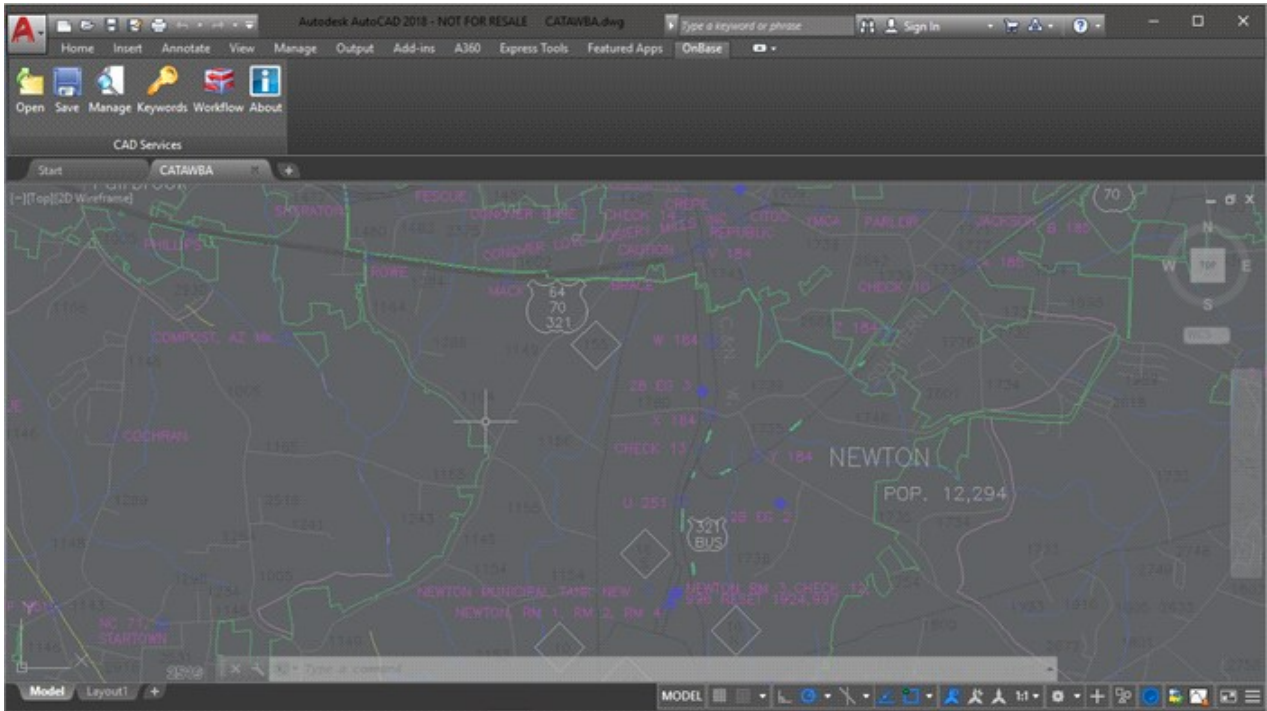
View, markup, measure, scale and compare CAD files stored in OnBase via a Unity-based product, without CAD software.

CAD Document Viewer naively supports both DWG and PDF files for view, markup, measure, compare, etc and is organically homegrown.

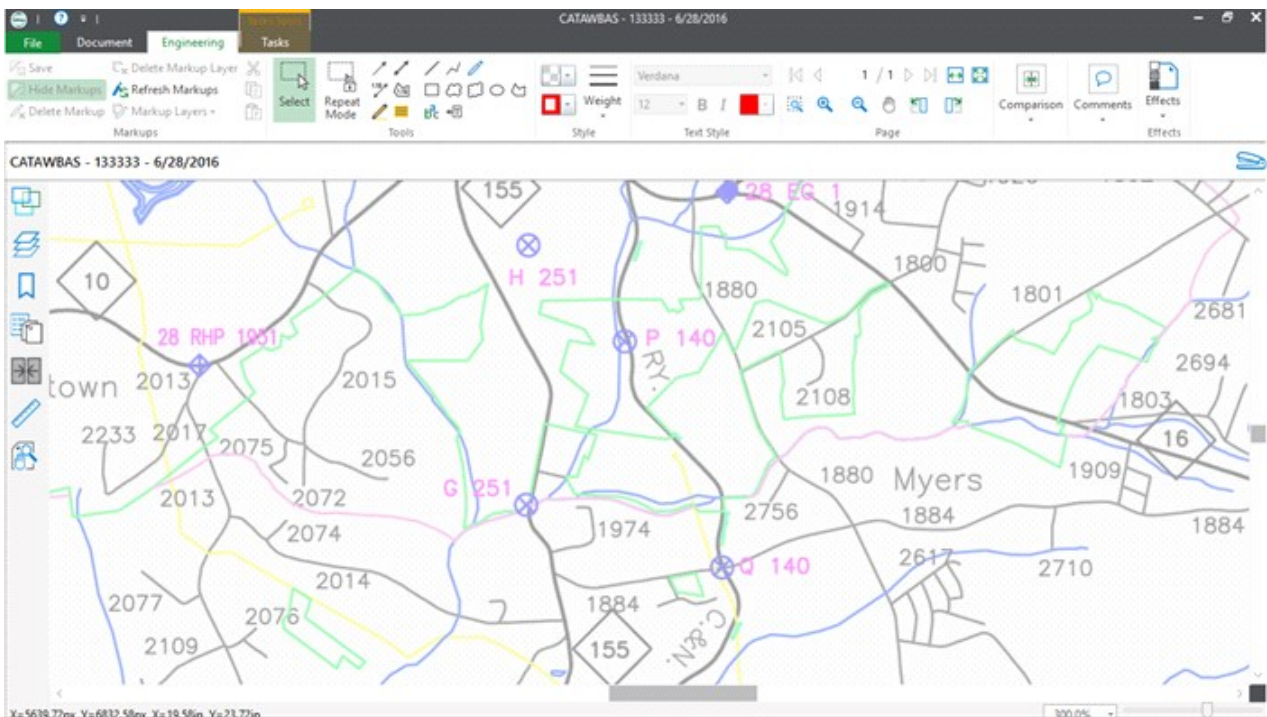
Other:

Backfile indexer (drawing crawler) can be used to create a DIP file of large quantities of CAD drawings while maintaining compound document relationships and extracting metadata from block data attributes to automate keyword indexing.

INTERFACE



CAD Services interface provides an 'OnBase' tab in AutoCAD® 2018 with ability to search (Document Retrieval), process (Workflow) and checkout files for edit.



Open a CAD (DWG) or PDF file in OnBase via Unity's integrated CAD Document Viewer, supporting features such as view, markup, measure, compare and more.

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