JUPITER PRIME

Consulting • Training • Advisory

جوبيتر برايم للاستشارات والتدريب

COURSE BROCHURE

EDMS Selection, Migration and User Adoption Training Course

13 – 17 September 2027
Munich

jupiterprime.uk

info@jupiterprime.uk

Registered in the United Kingdom and Saudi Arabia

EDMS Selection, Migration and User Adoption Training Course

Ref: 724_27163 **Date:** 13 – 17 September 2027 **Location:** Munich **Fees:** 5600 GBP

EDMS Selection, Migration and User Adoption is a 1-week training course for engineering document controllers, project information managers and EDMS administrators, in which each participant builds an EDMS selection and migration roadmap for their organisation. Many engineering firms are replacing ageing drawing registers and shared drives, and a poor platform choice or rushed cut-over can stall live projects for months. Jupiter Prime Training runs this course for teams facing that switch.

Why EDMS Selection, Migration and User Adoption Matters Now

Three pressures shape this subject. Clients and joint-venture partners expect a common data environment with status codes and revision history, as ISO 19650 describes for built-asset projects. Vendors offer cloud platforms with very different licensing, hosting and integration models. Engineers and site staff resist any new system that slows drawing issue. Organisations that specify requirements before demos, cleanse legacy registers before loading and plan user onboarding go live without losing revision history; those that skip these steps end up running two systems in parallel. The course also draws on ISO 16175 for functional requirements and ISO 15489-1 for records principles.

Who Gains Most from EDMS Selection, Migration and User Adoption

- Controllers who run drawing registers, transmittals and revision numbering on live projects
- Information leads who set the project information requirements and naming conventions
- Platform administrators who configure workflows, permissions and metadata fields
- Procurement and IT specialists who evaluate vendor bids and hosting terms
- Discipline coordinators who champion the new system among engineers and site staff

A cross-functional group drawn from document control, IT and one live project gains most.

EDMS Selection, Migration and User Adoption Capabilities

Participants learn to turn engineering document needs into a platform choice, a clean data move and a rollout that engineers actually use.

- Specify functional and integration requirements for an engineering EDMS — steering committees
- Weigh vendor bids on scoring criteria and total cost of ownership — procurement leads
- Design a metadata mapping and cleansing approach for legacy registers — platform administrators
- Test migrated drawings against reconciliation checks — project controls
- Build an onboarding and training sequence by user group — discipline leads
- Calculate adoption measures to track uptake after go-live — information sponsors

Key EDMS Selection, Migration and User Adoption Terms

- Requirements catalogue — a prioritised list of functions, integrations and constraints a new EDMS must meet, used to score vendor bids.
- Proof of concept — a time-boxed test of a shortlisted platform with real project drawings and workflows before contract award.
- Metadata mapping — a table linking each legacy register field to its target field, format and allowed values in the new system.
- Data cleansing — correcting duplicates, missing revisions and inconsistent codes in legacy records before migration.
- Cut-over — the planned switch from the old repository to the new EDMS, including freeze, final load and go-live checks.
- Adoption metric — a measure such as active users, transmittals issued or drawings checked in that shows real uptake of the platform.

EDMS Selection, Migration and User Adoption Day by Day

Day 1: Why Engineering Firms Change Platforms

- Current-State Repository Audit — Registers, Shared Drives and Gaps
- Common Data Environment Expectations From ISO 19650 — Client Requirements
- Business Case Drivers and Risks — Delay, Rework and Licence Spend
- Stakeholder and Champion Mapping — Engineers, Site Teams and Partners
- Selection Governance Structure — Steering Group and Decision Rights

Day 2: Requirements and Vendor Selection

- Requirements Catalogue Using ISO 16175 Functions — Must-Have Versus Desirable
- Integration Needs With Design Tools and Scheduling — Interface Scope
- Request for Proposal and Scoring Matrix — Fair Bid Comparison
- Scripted Vendor Demonstrations and Proof of Concept — Evidence Over Slides
- Total Cost of Ownership and Hosting Terms — Contract Award Decision

Day 3: Legacy Migration and Cut-Over

- Legacy Drawing and Register Inventory — Migration Scope Decisions
- Metadata Mapping Tables — Field, Code and Status Translation
- Cleansing Duplicates and Missing Revisions — Load Readiness
- Trial Loads and Reconciliation Checks — Record Count and Revision Integrity
- Cut-Over Runbook and Freeze Window — Go-Live Approval

Day 4: User Onboarding and Adoption

- User Group Personas — Controllers, Engineers, Site Teams and Contractors
- Role-Based Training Paths and Quick Guides — Onboarding Sequence
- Super-User Network and Floor-Walking Support — First-Month Help
- Adoption Metrics Dashboard — Logins, Check-Ins and Transmittals Issued
- Resistance Signals and Recovery Actions — When Teams Revert to Email

Day 5: Practising the EDMS Selection and Migration Roadmap

- Mock Vendor Shortlist Scoring — Rail and Process Plant Cases
- Drafting a Metadata Mapping for a Sample Register — Load Plan
- Sequencing Cut-Over Around Live Project Milestones — Risk Windows
- Setting Adoption Targets and Support Levels — Sponsor Expectations
- Completing the EDMS Selection and Migration Roadmap — Steering Sign-Off

Applying EDMS Selection, Migration and User Adoption After the Course

- Run a current-state audit of one project's drawing register and record duplicate, missing-revision and inconsistent-code counts.
- Draft a requirements catalogue with must-have and desirable functions and circulate it to discipline leads for scoring.

EDMS Selection, Migration and User Adoption Questions FAQ

What is EDMS Selection, Migration and User Adoption and why does it matter now?

It is the work of choosing an engineering document platform, moving legacy drawings into it and getting project teams to use it. It matters now because clients expect a common data environment and failed rollouts disrupt live projects.

Which roles gain most from EDMS Selection, Migration and User Adoption?

Engineering document controllers, project information managers and EDMS administrators gain most, together with procurement and IT staff who take part in platform evaluation.

How does EDMS Selection, Migration and User Adoption differ from a general EDMS operation course?

It covers choosing, loading and rolling out a platform rather than day-to-day operation. It adds vendor scoring, mapping and cut-over.

What do you bring back from EDMS Selection, Migration and User Adoption?

You bring back a roadmap covering requirements, vendor scoring, migration mapping, cut-over sequence and adoption targets, ready for your steering group.

EDMS Selection, Migration and User Adoption: The Way Forward

The EDMS selection and migration roadmap links requirements, vendor scoring, legacy mapping, cut-over timing and onboarding targets in one sequence. Its first use is the steering decision on which vendors enter a proof of concept. Controllers, information leads and administrators maintain it. Revisit adoption targets a month after go-live, since check-in and transmittal figures show which user groups need further support.