



PRISM ERI™ User Guide

Version 1.1

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Revision History

Version	Date	Description
1.0	July 2026	Initial Release
1.1	Aug 2026	Updated contact info

Document Conventions

This guide uses the following callout boxes throughout the manual.

Best Practice

Recommended methods that produce the best results.

Note

Helpful background information.

Important

Information that should not be overlooked.

Example

Worked examples demonstrating a feature.

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Chapter 1 – Introduction

Executive Overview

PRISM ERI™ compares structured engineering data, regardless of its source, using semantic search and engineering-specific comparison logic to identify matching requirements, gaps, changes, and other engineering relationships.

At a Glance

Purpose: Compare engineering information.

Benefits:

- Faster reviews
- Consistent results
- Local processing

Welcome to PRISM ERI™

Engineering organizations routinely compare specifications, standards, requirements, and other engineering datasets. PRISM ERI automates these comparisons while preserving engineering context.

What Makes PRISM ERI Different?

Many comparison tools search for matching words. PRISM ERI searches for matching engineering intent.

Example

Reference: 'Provide stainless steel conduit in corrosive environments.'

Comparison: 'Use 316 stainless steel conduit wherever corrosion is anticipated.'

PRISM ERI identifies these as corresponding engineering information.

Typical Applications

Requirements verification, standards compliance, specification reviews, procurement reviews, engineering audits, design change evaluations.

Key Features

Semantic comparison, flexible column mapping, One-to-One/One-to-Many/Batch modes, confidence scoring, redlines, Excel reporting, saved setups.

Typical Workflow

1. Select Reference dataset
2. Select Comparison dataset
3. Configure settings
4. Map compare columns
5. Run assessment
6. Review Excel output

Who Should Use PRISM ERI?

Engineers, engineering managers, verification teams, and technical reviewers.

What PRISM ERI Does Not Do

PRISM ERI supports engineering decisions but does not replace engineering judgment or determine compliance.

Before You Begin

Requires Windows or macOS, Microsoft Excel, and .xlsx datasets.

About This Guide

Each chapter explains why a feature exists before describing how to use it.

PRISM ERI Philosophy

Engineering documents rarely use identical wording.

They should not have to in order to describe the same engineering concept.

PRISM ERI was designed to compare engineering intent—not just engineering text.

Chapter 2 – Installation Requirements

Purpose

This chapter describes the hardware, software, and operating system requirements needed to install and run PRISM ERI successfully.

Supported Operating Systems

PRISM ERI is supported on the following operating systems:

Windows

- Windows 10 (64-bit)
- Windows 11 (64-bit)

macOS

- macOS Sonoma
- macOS Sequoia
- Later compatible releases

Recommended Hardware

PRISM ERI runs on most modern Windows and macOS computers. The following configuration is recommended for optimal performance.

Component	Recommendation
Processor	Modern quad-core 64-bit processor or better
Memory	16 GB RAM or greater
Storage	SSD with at least 1 GB of available disk space
Display	1920 × 1080 or higher

Microsoft Excel Requirements

PRISM ERI uses Microsoft Excel (*.xlsx*) workbooks as both input and output files.

Chapter Summary

Before installing PRISM ERI, ensure that your computer meets the recommended operating system and hardware requirements and that Microsoft Excel is available for working with PRISM ERI input and output files.

Next Chapter

The next chapter explains how to install PRISM ERI on Windows and macOS.

Chapter 3 – Installation

Purpose

This chapter explains how to install PRISM ERI on Windows and macOS and prepare the software for first use.

By the end of this chapter, PRISM ERI will be installed and ready for license activation.

Before You Begin

Before installing PRISM ERI, verify that:

- Your computer meets the requirements described in Chapter 2.
- You have downloaded the correct installer for your operating system.

You have permission to install software on your computer.

Best Practice: Close Microsoft Excel and any other applications before beginning the installation.

Installing PRISM ERI

Installing PRISM ERI is similar to installing most desktop applications.

1. Download the installer for your operating system.
2. Run the installer.
3. Follow the on-screen installation instructions.
4. When the installation is complete, launch PRISM ERI.

No additional software configuration is required before starting the application.

Note: The installation process copies the PRISM ERI application to your computer but does not activate the software. License activation is completed separately after installation.

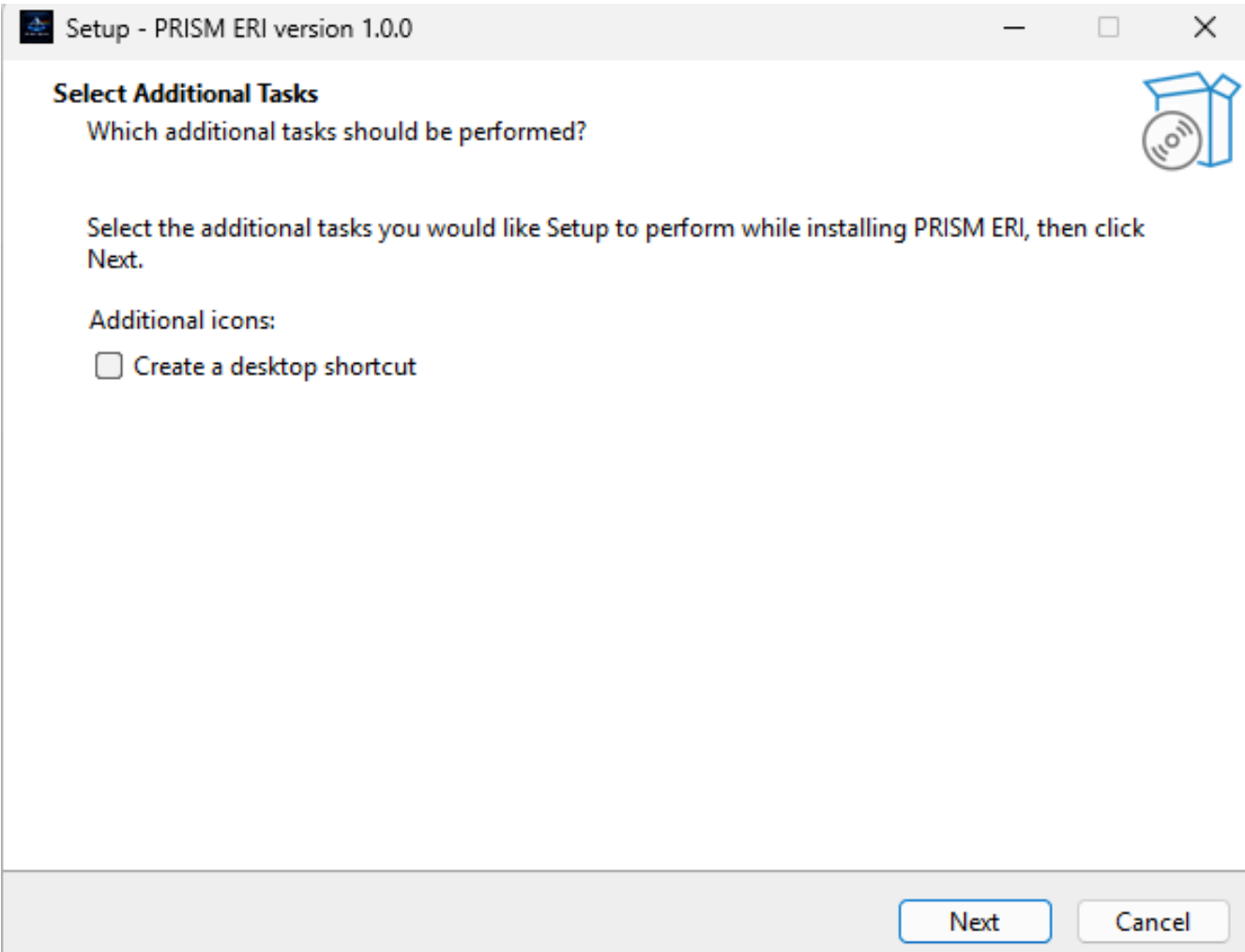


Figure 3.1. Windows Installation Wizard

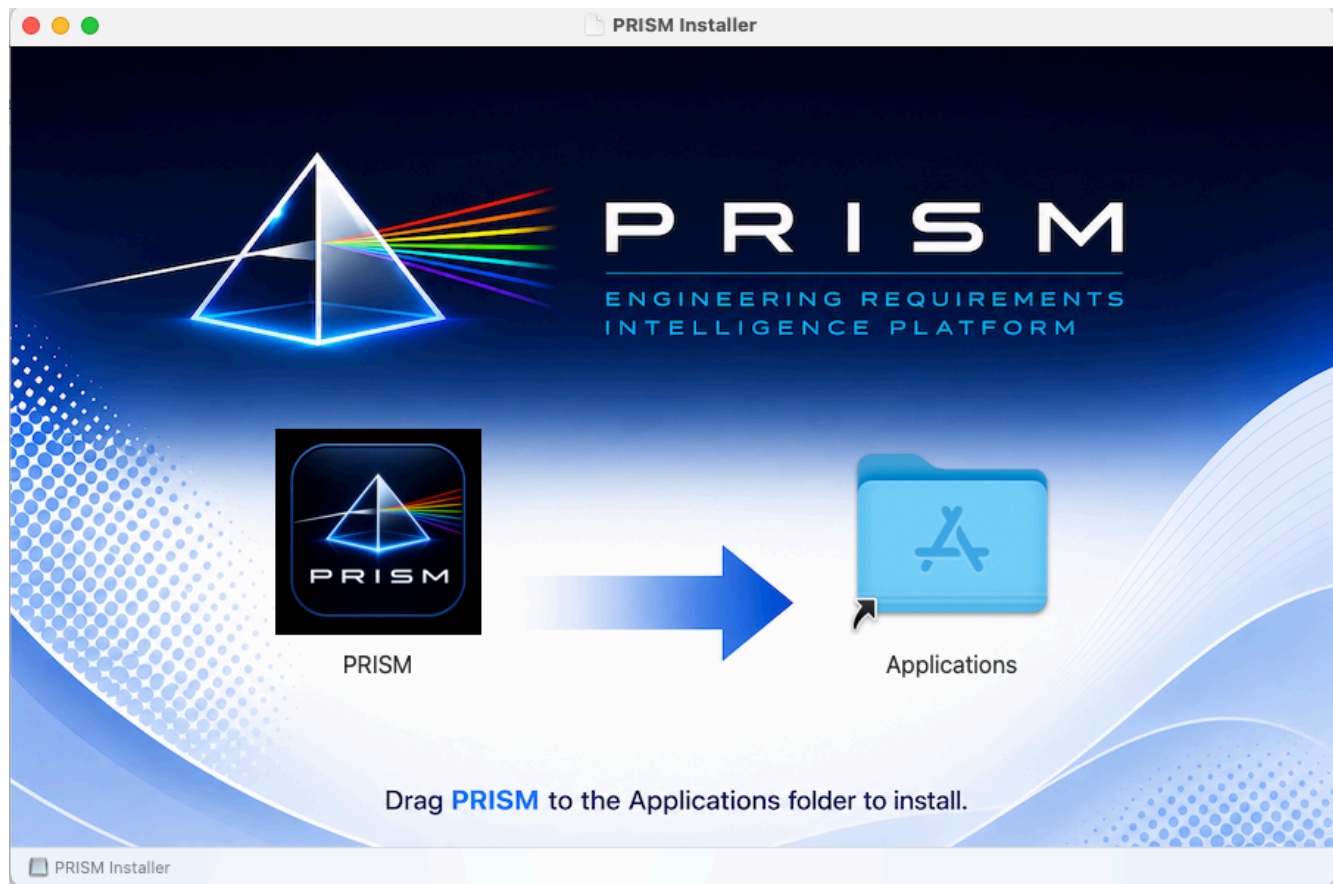


Figure 3.2. macOS Installation

Starting PRISM ERI for the First Time

The first time PRISM ERI starts, the application opens normally but cannot perform assessments until a valid license has been imported.

To prepare for license activation:

1. Open PRISM ERI.
2. Select **Help → License Status**.
3. Record the displayed Machine ID.

The Machine ID uniquely identifies your computer and is used to generate your license.

Requesting a License

To request a license:

1. Select **Help → License Status**.
2. Select **Send Machine ID**.

If an email application is configured on your computer, PRISM ERI automatically creates an email containing your Machine ID.

If an email application is not available:

1. Copy the displayed Machine ID.
2. Create a new email.
3. Send the Machine ID to:

keith_carley@att.net

Include the following information:

- Your name
- Company name

Important: The Machine ID is unique to your computer. Licenses issued for one computer cannot be used on another computer.

Receiving Your License

After your license request has been processed, you will receive a PRISM ERI license file.

Save the license file in a location where it can be easily located during activation.

Best Practice: Save the license file in your Documents folder or another permanent location so it can be reused if PRISM ERI is reinstalled.

Next Steps

After receiving your license file, continue to **Chapter 4 – Licensing**, which explains how to import, verify, and manage your PRISM ERI license.

Chapter Summary

In this chapter, you learned how to:

- Install PRISM ERI.
- Start the application for the first time.
- Obtain the Machine ID.
- Request a software license.
- Prepare for license activation.

Next Chapter

The next chapter explains how to activate PRISM ERI using the provided license file.

Chapter 4 – Licensing

Purpose

This chapter explains how to activate PRISM ERI using a license file and verify that the software is ready for use.

By the end of this chapter, PRISM ERI will be fully licensed and ready to perform engineering assessments.

Understanding PRISM ERI Licensing

Each PRISM ERI license is generated for a specific computer.

During the licensing process, PRISM ERI uses a unique **Machine ID** to identify the computer on which the software is installed. This Machine ID is used to generate a license file that activates PRISM ERI for that computer.

After the license file has been imported, PRISM ERI is ready to perform engineering assessments.

Note: A separate license is required for each computer on which PRISM ERI is installed.

Viewing License Information

To view the current license information:

1. Open PRISM ERI.
2. Select **Help → License Status**.

The License Status window displays the current licensing information for PRISM ERI. Before a license is imported, the window displays the Machine ID and the current license status. After activation, it also displays information about the installed license, including:

- License status
- Machine ID
- Licensed user
- Company
- License type
- Expiration date (if applicable)

Refer to **Figure 4.1** for an example of what the license status will look like prior to importing a license.

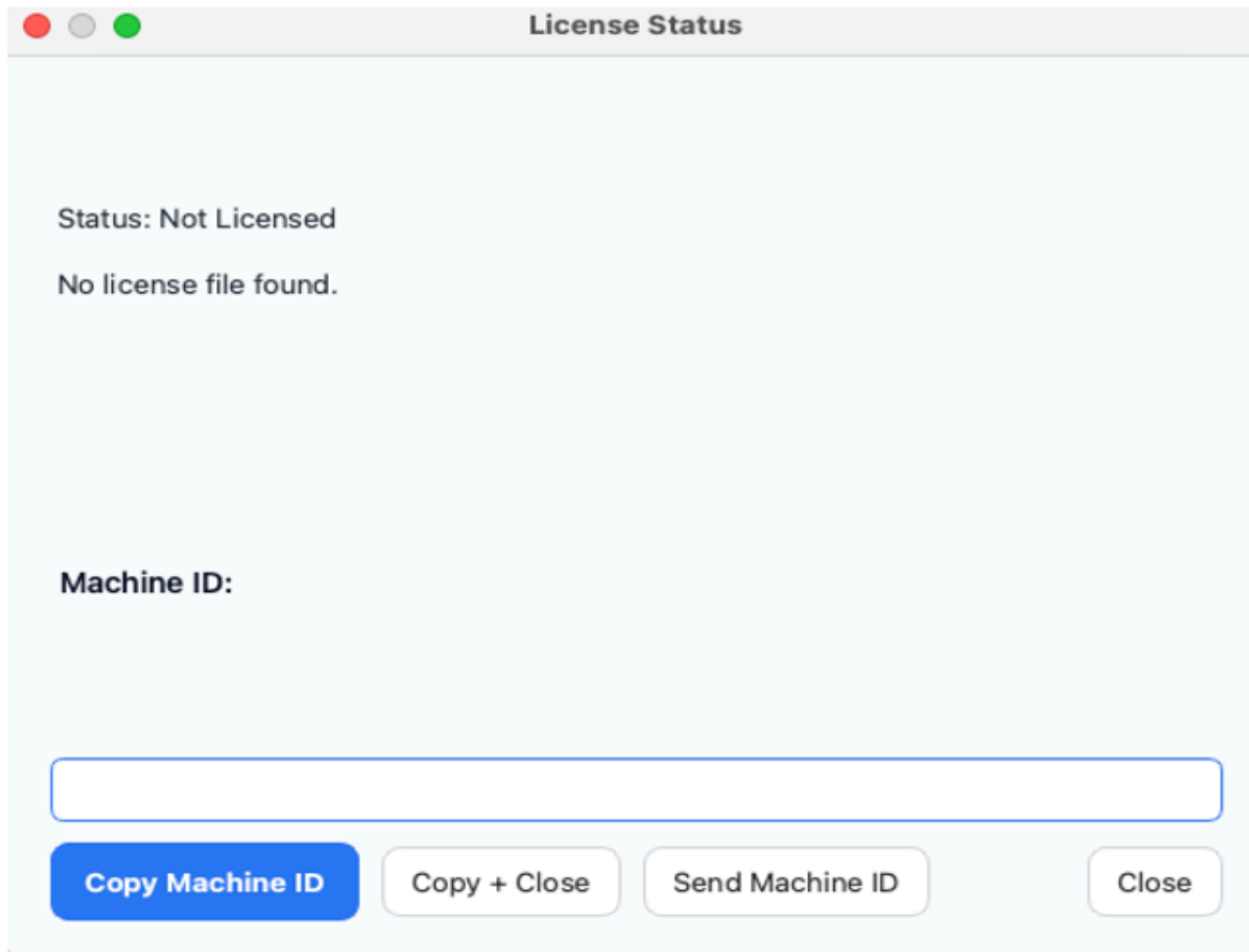


Figure 4.1. License Status Window

Note: The Machine ID has been intentionally omitted from this figure.

Importing a License

After receiving your PRISM ERI license file:

1. Save the license file to your computer.
2. Open PRISM ERI.
3. Select **Help → Import License**.
4. Browse to the license file.
5. Select **Open**.

PRISM ERI validates the license and activates the software.

If the license is valid, the License Status window displays the updated license information.

Best Practice: Store the license file in a permanent location so it can be reused if PRISM ERI is reinstalled.

Verifying License Activation

After importing the license:

1. Open **Help → License Status**.
2. Confirm that the license status indicates the software has been successfully activated.
3. Verify that the licensed user and company information are correct.

Refer to **Figure 4.2**. for an example of what the license will look like.

Once these items have been confirmed, PRISM ERI is ready to perform assessments.

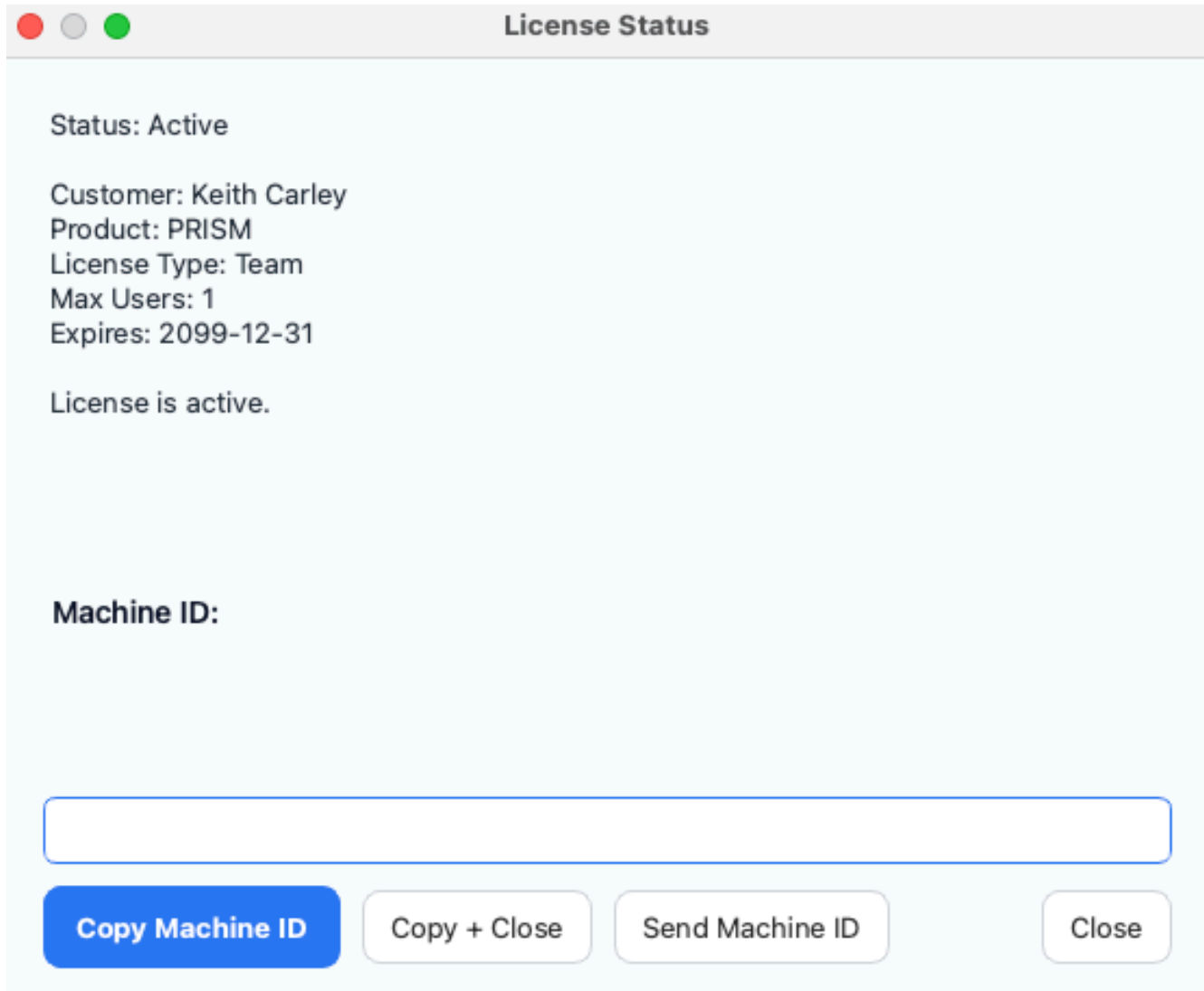


Figure 4.2. License Status (After Activation)

Note: The Machine ID has been intentionally omitted from this figure.

Replacing or Updating a License

A new license may be required when:

- Installing PRISM ERI on a different computer.
- Renewing a time-limited license.
- Updating an existing license.

To replace a license, simply import the new license file using **Help → Import License**.

The new license automatically replaces the previous license.

If a License Cannot Be Imported

If PRISM ERI reports that the license is invalid:

Verify that:

- The correct license file was selected.
- The license was issued for the current computer.
- The license file has not been modified.

If the issue cannot be resolved, request a replacement license using the Machine ID displayed in the License Status window.

Important: The license file must remain exactly as it was provided. You may rename the file if desired, but do not edit or modify its contents. Any changes to the file contents will invalidate the license.

Chapter Summary

In this chapter, you learned how to:

- View the current license information.
- Import a PRISM ERI license.
- Verify successful license activation.
- Replace an existing license when necessary.

Next Chapter

The next chapter provides a Quick Start tutorial that walks through your first PRISM ERI assessment.

Chapter 5 – Quick Start

This chapter provides a brief introduction to the PRISM ERI assessment workflow by walking through a simple assessment from start to finish.

By the end of this chapter, you will have completed your first assessment and generated an assessment workbook.

Note: This chapter introduces the basic workflow. Later chapters explain each step in greater detail.

Before You Begin

Before starting the Quick Start:

- PRISM ERI must be installed.
- A valid license must be imported.
- A Reference dataset and Comparison dataset must be available.

Download the PRISM ERI Demo Package from the [PRISM ERI website](#) via the Download Sample Assessment button at the bottom of the page (**see Figure 5.1**). The package includes sample Reference and Comparison datasets that are recommended for completing the Quick Start assessment.

See what you're missing in your current process.

Request a demo with your data and see your requirements compared against standards in minutes — with gaps, matches, and redlines clearly identified.

Request a Demo →

Download Sample Assessment

Includes reference datasets, project specifications, PRISM results including redlined requirement comparisons.

Figure 5.1. Downloading the PRISM ERI Demo Package

Performing Your First Assessment

Step 1 – Start PRISM ERI

Open PRISM ERI.

The main application window appears.

PRISM



PRISM
ENGINEERING REQUIREMENTS
INTELLIGENCE PLATFORM

v1.0.1

Mode Selection

☒ One-to-One
Compare one Comparison file to one Reference file.

☐ One-to-Many
Compare one Comparison file against a larger Reference dataset.

☐ Batch One-to-Many
Compare many Comparison files against the same Reference dataset.

Anchor Strategy

☐ Reference Anchored

☒ Include unmatched Comparison rows

Keep Reference rows as the main structure and attach Comparison matches.

☒ Comparison Anchored
Start from each Comparison row and return matching Reference rows.

Match Behavior

☐ Best Match Only
Return only the strongest match for each Comparison row.

☒ Multiple Strong Matches
Return multiple strong matches when appropriate.

Data Sources

Reference File
Browse

Comparison File
Browse

Output Location
Browse

1 file selected

1 file selected

Column Mapping

Matching Configuration

Preset

Balanced

Similarity Threshold

Minimum Match Confidence

Match Candidates Reviewed

Balanced is recommended for most datasets.

Advanced Options

☐ Rebuild Index

☒ Save Configuration

Run

Status / Log

Ready

Select Mode, Select Anchor Strategy & Match Behavior, Select Data Sources, Configure Column Mapping, then click Run Assessment.

Figure 5.2. Main Window

Step 2 – Select the Assessment Mode

Select: **One-to-One**

This mode compares one Comparison dataset against one Reference dataset.

Step 3 – Select the Anchor Strategy

For this Quick Start, select: **Comparison Anchored**

This strategy makes it easy to identify which Reference requirements correspond to each Comparison requirement.

Step 4 – Select the Datasets

Select:

- Reference dataset
- Comparison dataset
- Output folder

Use the sample datasets if this is your first assessment.

Step 5 – Configure Column Mapping

Select: **Configure Column Mapping** to open the Column Mapping window.

If using the supplied sample datasets, the default selections are appropriate, except for the Comparison columns.

Update both the **Reference Compare Column** and **Comparison Compare Column** so that both are set to Requirement Text.

Select **Apply** to save the settings and close the Column Mapping window.

Configure Dataset Columns

Saved Setup

Load

Save As

Rename

Delete

Export

Import

Dataset Names

Reference Dataset Name

Reference Dataset

Comparison Dataset Name

Comparison Dataset

Reference Dataset Columns

Select All

Clear All

☒ Only show selected

Search Reference columns...

Selected: 5 / 5 columns

Include	Source Column	Output Label
☒	Tool Unique Code	Tool Unique Code
☒	Requirement Document	Requirement Document
☒	Special Codes	Special Codes
☒	Requirement ID	Requirement ID
☒	Requirement Text	Requirement Text

Comparison Dataset Columns

Select All

Clear All

☒ Only show selected

Search Comparison columns...

Selected: 3 / 3 columns

Selected Output Order

Reference Dataset Output Order

Tool Unique Code

Requirement Document

Special Codes

Requirement ID

Requirement Text

Move Up

Move Down

Comparison Dataset Output Order

Requirement ID

Special Code

Requirement Text

Move Up

Move Down

Comparison Columns

Reference Compare Column

Requirement Text

Comparison Compare Column

Requirement Text

Output File Name Column

Use original comparison filename

Cancel

Apply

Figure 5.3. Column Mapping Window

Step 6 – Matching Configuration

Leave the Matching Configuration set to: **Balanced**

For most assessments, this provides the best balance between identifying valid engineering relationships and minimizing false positives.

Step 7 – Run the Assessment

Select **Run Assessment**.

PRISM ERI will:

- Load the datasets.
- Build or load the semantic search index.
- Compare the engineering information.
- Generate an Excel workbook.

A progress indicator displays the current assessment status.

Step 8 – Review the Results

When the assessment completes:

Open the generated Excel workbook.

Review:

- Matching requirements
- Redlined differences
- Supporting metadata
- Unmatched requirements

Congratulations—you have completed your first PRISM ERI assessment.

What You've Learned

During this Quick Start you:

- Selected an Assessment Mode.
- Selected an Anchor Strategy.
- Loaded engineering datasets.
- Verified the Compare Columns.
- Ran an assessment.
- Reviewed the generated assessment workbook.

The following chapters explain each step of the assessment process in greater detail.

Best Practice: When learning PRISM ERI, begin with the supplied sample datasets before assessing production engineering documents. This allows you to become familiar with the workflow and assessment results without modifying your organization's engineering data.

Next Chapter

Now that you've completed your first assessment, refer to **Chapter 6** for detailed guidance on configuring and running assessments.

Chapter 6 – Running an Assessment

Purpose

This chapter explains the complete assessment workflow, from selecting datasets through generating the final Excel report.

By the end of this chapter, you will understand how to configure and execute an assessment and know what to expect while PRISM ERI processes your data.

What Is an Assessment?

An assessment is the process of comparing one engineering dataset against another to identify matching requirements, additions, deletions, and revisions.

During an assessment, PRISM ERI analyzes the selected datasets using semantic search and engineering-specific comparison logic to identify the most relevant candidate matches.

The results are written to a Microsoft Excel workbook for review.

The Assessment Workflow

A typical PRISM ERI assessment follows these steps:

1. Choose the **Assessment Mode**.
2. Select the **Anchor Strategy**.
3. Select the **Match Behavior**.
4. Select the **Reference dataset or folder**.
5. Select the **Comparison dataset or folder**.
6. Select the **Output Location**.
7. Configure **Column Mapping**.
8. Determine the **Matching Configuration**.

Best Practice: For an initial assessment, leave **Balanced** selected unless the results indicate that adjustment is needed.

9. Review the **Advanced Options**.

Important: Select **Rebuild Index** whenever the Reference dataset is new or has changed. After the index has been created, it can be reused for later assessments that use the same unchanged Reference dataset. For the very first run the index will be built whether **Rebuild Index** was selected or not.

10. Select **Run Assessment**.
11. Review the generated Excel report(s).

Assessment Mode

The **Assessment Mode** determines which assessment or assessments will be performed.

PRISM ERI provides three assessment modes:

One-to-One

Compares a single Comparison dataset against a single Reference dataset.

This mode is typically used to compare two documents, such as a project specification against a governing standard or one revision of a document against another.

One-to-Many

Compares a single Comparison dataset against multiple Reference datasets contained within a selected folder.

The results are combined into a single output workbook showing matches to the applicable Reference datasets.

Note: the tool will provide results if the **Comparison dataset** is the larger set. But, for best results the **Reference dataset** should generally be the larger dataset.

One-to-Many Batch

Compares all Comparison datasets within a selected folder against all Reference datasets within a selected folder.

Batch mode is intended for situations where a large number of Comparison datasets must be assessed against a large number of Reference datasets using the same configuration. Each applicable Comparison file is processed automatically, and a separate output workbook is generated for each Comparison dataset.

Anchor Strategy

The **Anchor Strategy** determines how PRISM ERI organizes the assessment results and should be selected based on the question you are trying to answer.

The same two datasets can produce different, but equally valuable, assessment results depending on the selected Anchor Strategy.

Note: The selected **Anchor Strategy** changes only how the assessment results are organized and presented. It does not change the underlying comparison process or the matches identified by PRISM ERI.

PRISM ERI provides two Anchor Strategies:

Reference Anchored

Select **Reference Anchored** when your primary objective is to determine whether the information contained in the Reference dataset is addressed by the Comparison dataset.

This strategy is commonly used for:

- Standards compliance reviews
- Requirements coverage assessments
- Gap identification
- Verifying that project requirements address governing standards

The output workbook is organized around the Reference dataset. Each Reference requirement is evaluated to determine whether a corresponding requirement exists in the Comparison dataset.

Reference requirements with no suitable match may indicate information that is missing from the Comparison dataset.

Best Practice: Select **Reference Anchored** when your objective is to identify missing critical requirements or information, such as Environmental, Security, or Safety requirements, that should be present in the Comparison dataset.

Comparison Anchored

Select **Comparison Anchored** when your objective is to identify all Reference requirements that relate to each requirement in the Comparison dataset.

This strategy is commonly used for:

- Project specification reviews
- Vendor document evaluations
- Reviewing revised documents
- Identifying project-specific requirements
- Identifying duplicate or overlapping requirements across multiple Reference datasets.

The output workbook is organized around the Comparison dataset. Each Comparison requirement is evaluated to determine where it is addressed within the Reference datasets.

Comparison requirements with no suitable match may indicate new, additional, or project-specific information.

Refer to **Chapter 9 – Understanding Results** for more details on Anchor Strategies.

Match Behavior

Match Behavior determines how many matches PRISM ERI reports for each anchored requirement.

PRISM ERI provides two Match Behavior options:

Best Match

Reports only the highest-ranked match identified by PRISM ERI for each anchored requirement.

This option produces a simplified output and is useful when only the strongest candidate match is required.

Multiple Strong Matches

Reports all strong candidate matches identified by PRISM ERI for each anchored requirement.

This option is particularly valuable when:

- A requirement is addressed by multiple related requirements.
- A requirement is distributed across several paragraphs.
- Multiple Reference requirements collectively satisfy a Comparison requirement.
- Engineering judgment is needed to determine the most appropriate relationship.

Providing multiple strong matches allows reviewers to evaluate additional candidate relationships that may be relevant to the assessment.

Best Practice: In most cases, select **Multiple Strong Matches**. Engineering requirements frequently contain one-to-many or many-to-one relationships that cannot always be represented by a single match. Reviewing multiple strong matches provides additional context and supports a more thorough engineering review.

Selecting Data Sources

Before an assessment can be performed, PRISM ERI requires three pieces of information:

- The **Reference dataset**
- The **Comparison dataset**
- The **Output location**

These selections define the information to be compared and where the assessment results will be saved.

Reference Dataset

The Reference dataset contains the requirements or information against which the Comparison dataset will be evaluated.

Examples include:

- Corporate engineering standards
- Design basis documents
- Company specifications
- Regulatory requirements
- Master requirements libraries

The selected Reference dataset also serves as the source for the semantic search index used during the assessment.

Note: The next section provides more information about the Semantic Search Index.

Comparison Dataset

The Comparison dataset contains the information being evaluated against the selected Reference dataset.

Depending on the selected Assessment Mode, you may select:

- A single Comparison dataset
- Multiple Comparison datasets
- A folder containing Comparison datasets

Examples include:

1. Project specifications
2. Vendor documents
3. Customer requirements
4. Revised document versions
5. Verification datasets
6. Other engineering datasets

Output Location

The Output location specifies where PRISM ERI will save the generated assessment results.

The Reference and Comparison datasets are never modified. All assessment results are written to new Microsoft Excel workbooks in the selected output location.

Best Practice: Create a dedicated output folder for each assessment or project. Keeping assessment results separate from the source datasets makes it easier to locate previous assessments and maintain an organized project history.

The Semantic Search Index

Before comparing requirements, PRISM ERI builds a semantic search index from the selected Reference dataset.

During the assessment, **every Comparison requirement is evaluated against the entire Reference dataset**. The semantic search index enables PRISM ERI to rapidly identify the most relevant candidate requirements for detailed engineering evaluation.

Those candidate requirements are then analyzed using PRISM ERI's engineering-specific comparison logic to determine the strongest matches and generate the final assessment results.

Because the search index is created from the Reference dataset, it can be reused for future assessments that use the same unchanged Reference dataset. Reusing the index significantly reduces assessment time while maintaining consistent assessment results.

Important: If the Reference dataset changes, the search index must be rebuilt before running another assessment.

Column Mapping

Column Mapping tells PRISM ERI which information should be compared, and which information should be included in the assessment results.

Because engineering organizations use different spreadsheet structures, column names, and data formats, PRISM ERI does not require the Reference and Comparison datasets to use identical layouts. Instead, Column Mapping allows each dataset to be configured independently.

Before running an assessment, verify that:

- The appropriate comparison columns have been selected.
- The desired output columns have been selected.
- The output column names are correct.
- The output column order meets your reporting needs.
- The Reference and Comparison dataset names are correct.

After completing the Column Mapping configuration, the settings can be saved as a Saved Setup for reuse in future assessments.

Best Practice: Create and save a **Saved Setup** for each type of assessment you perform regularly. Reusing a Saved Setup helps ensure consistent assessment results and reporting across projects.

For detailed information about configuring Column Mapping, see **Chapter 7 – Column Mapping**.

Matching Configuration

The **Matching Configuration** controls how PRISM ERI identifies and evaluates potential matches between the Reference and Comparison datasets.

PRISM ERI provides several predefined Matching Configuration presets, each designed for a different assessment objective. These presets adjust the matching behavior to favor broader candidate selection, more selective matching, or a balance between the two.

For most assessments, the **Balanced** preset is recommended.

The **Balanced** preset is designed to identify the highest practical percentage of valid engineering matches while minimizing false positives. For most assessments, it provides the best overall balance between match coverage and result quality.

Other presets are available for situations where a broader or more selective assessment is desired.

Best Practice: Begin every assessment using the **Balanced** preset. Only consider a different preset when your assessment objectives require either broader candidate selection or more selective matching.

Advanced Options

The **Advanced Options** provide additional controls that affect how PRISM ERI performs an assessment.

Rebuild Index forces PRISM ERI to create a new semantic search index from the selected Reference dataset. Select this option when using a new Reference dataset or whenever the Reference dataset has changed.

Best Practice: Select **Rebuild Index** only when using a new or modified Reference dataset. When using the same unchanged Reference dataset for additional assessments, leave **Rebuild Index** cleared to reuse the existing semantic search index and reduce assessment time.

Running the Assessment

After completing the assessment configuration, select **Run Assessment** to begin processing.

During the assessment, PRISM ERI:

- Loads the selected datasets.
- Builds or loads the semantic search index.
- Identifies candidate matches.
- Applies PRISM ERI's engineering-specific comparison logic.
- Generates the assessment results.

The progress area displays the current status of the assessment throughout processing.

To cancel an assessment before it is complete, select **Stop Assessment**.

When the assessment is complete, PRISM ERI displays a completion message and automatically saves the generated Excel workbook to the selected output location.

Best Practice: Allow the assessment to complete whenever possible. If an assessment must be stopped, simply correct the configuration or data as needed and run the assessment again.

Reviewing the Results

When the assessment is complete, PRISM ERI automatically saves the generated Excel workbook to the selected output location.

The assessment results provide the information needed to begin the engineering review process.

Depending on the selected assessment configuration, the workbook may contain:

- Matching requirements
- Multiple strong candidate matches
- Requirements with no suitable match
- Match confidence scores
- Redlined text differences
- Additional supporting information selected through Column Mapping

The generated workbook is intended to support engineering review and should be evaluated using the technical knowledge and project requirements applicable to the assessment.

Detailed guidance for interpreting assessment results is provided in **Chapter 9 – Understanding Results**.

Chapter Summary

In this chapter, you learned how to:

- Select the appropriate Assessment Mode.
 - Choose the Anchor Strategy based on your assessment objectives.
 - Configure Match Behavior.
 - Select the Reference and Comparison datasets.
 - Configure Column Mapping and Matching Configuration.
 - Use the semantic search index effectively.
 - Run an assessment and review the generated results.
-

Next Chapter

The next chapter explains Column Mapping in greater detail.

Chapter 7 – Column Mapping

Purpose

This chapter explains how to configure **Column Mapping** for an assessment. Column Mapping tells PRISM ERI which information should be compared, which columns should appear in the assessment results, and how those results should be organized.

Proper Column Mapping ensures that PRISM ERI produces meaningful assessment results while allowing organizations to work directly with their existing engineering data.

What is Column Mapping?

Engineering information is stored in many different formats. Some organizations maintain requirements in Microsoft Word or Excel workbooks, while others use dedicated Requirements Management systems such as IBM DOORS®, PTC Codebeamer®, Jama Connect®, Polarion®, or other engineering data management tools.

Before an assessment can be performed, the Reference and Comparison datasets must be exported to Microsoft Excel (.xlsx) format. Most Requirements Management systems provide an export capability that allows requirements and associated data to be exported directly to Excel.

Because each organization structures its engineering data differently, the exported Excel files often contain different column names, column orders, and supporting information.

Rather than requiring users to modify their exported data, PRISM ERI uses **Column Mapping** to identify the information to be compared and to configure how assessment results are reported.

This flexibility allows PRISM ERI to compare engineering data from different organizations and Requirements Management systems while preserving the original source data.

Best Practice: Export the information needed for the assessment directly from your Requirements Management system whenever possible. Avoid modifying the exported data before running the assessment.

Understanding the Column Mapping Window

The Column Mapping window allows the Reference and Comparison datasets to be configured independently. Each dataset can be configured using the same set of Column Mapping options.

The window is divided into two primary sections:

- **Reference Dataset** – Used to configure the Reference dataset.
- **Comparison Dataset** – Used to configure the Comparison dataset.

Although the two sections are configured independently, both provide the same set of configuration options.

The Column Mapping window is shown in **Figure 5-3**.

Reference Dataset and Comparison Dataset Columns

The **Reference Dataset Columns** and **Comparison Dataset Columns** determine which information from each dataset will be included in the assessment report.

Selecting Columns

When a dataset is loaded, PRISM ERI automatically selects all available columns for output.

For datasets containing only a few columns, leaving all columns selected is often appropriate.

Large engineering datasets may contain dozens or even hundreds of metadata columns. In these cases, selecting only the information needed for the assessment generally produces a cleaner and more useful report.

The **Clear All** button quickly removes all selected columns. Individual columns can then be selected as needed.

The **Search** box allows specific columns to be located quickly, eliminating the need to scroll through large datasets.

The **Only Show Selected** option filters the display to show only the columns currently selected for output, making it easier to review the final configuration.

Best Practice: For large datasets, select Clear All first, then use the Search box to locate and select only the columns needed for the assessment.

Output Labels

Once the desired columns have been selected, the **Output Label** feature may be used to rename each column.

Changing an Output Label affects only the generated assessment workbook. The original engineering data is never modified.

Output Labels are particularly useful when exported datasets contain abbreviated or system-generated column names.

Output Labels allow the generated assessment workbook to use terminology that is familiar to your organization.

Selected Output Order

After selecting the output columns, arrange them in the order they should appear in the assessment report. Do this for both the Reference and Comparison datasets.

Select a column name and use **Move Up** or **Move Down** to reposition it.

Repeat until the output order matches the desired report layout.

The selected output order determines the left-to-right arrangement of columns in the generated assessment workbook.

Comparison Columns

The Comparison Columns determine which engineering data PRISM ERI analyzes during the assessment.

The Reference Compare Column identifies the engineering data that will be compared within the Reference dataset.

The Comparison Compare Column identifies the engineering data that will be compared within the Comparison dataset.

In most assessments, these columns contain the engineering data text from your dataset.

Selecting the appropriate Compare Columns is critical because PRISM ERI compares only the selected engineering data.

Important: Selecting the wrong Compare Columns may significantly affect assessment results.

Output File Name Column

By default, PRISM ERI names the output workbook using the original Comparison dataset filename.

Some Requirements Management systems generate filenames that provide little indication of the engineering data contained within the file.

The **Output File Name Column** allows a metadata field within the Comparison dataset to be used as the output filename. This makes generated assessment reports easier to identify and organize while eliminating the need to manually rename files.

Example: Codebeamer export filenames do not clearly identify their contents. Selecting a metadata column containing the requirement tracker number and title allowed each assessment workbook to be automatically named with a meaningful engineering identifier.

Saved Setup

After configuring the Column Mapping window, the configuration can be saved as part of a **Saved Setup** for reuse in future assessments.

Saved Setups preserve the complete assessment configuration, eliminating the need to repeatedly configure common assessments.

For additional information, see **Chapter 8 – Saved Setups**.

Verifying the Configuration

Before selecting **Apply**, review the Column Mapping configuration to ensure it accurately represents the current Reference and Comparison datasets.

Verify that:

- The selected output columns are appropriate for the current datasets.
- The Output Labels and output order are appropriate.
- The Output File Name Column is suitable for the current Comparison dataset.
- The selected **Compare Columns** identify the engineering data intended for comparison.

Important: PRISM ERI matches columns by name, not by the engineering meaning of the data they contain. Always verify that the selected Compare Columns contain the intended engineering data before running an assessment.

Example: While using PRISM ERI to perform an assessment, two exported datasets contained columns with nearly identical names, but each column contained different engineering data. The configuration appeared correct until the column contents were reviewed in the original datasets. This example demonstrates the importance of understanding the engineering data being assessed rather than relying solely on column names.

Best Practice: Review the selected Compare Columns whenever using a new dataset or a dataset exported from a different source. A quick verification helps ensure the assessment compares the intended engineering data.

Applying the Configuration

After completing the Column Mapping configuration, select **Apply** to save the current configuration and return to the main PRISM ERI window.

Chapter Summary

In this chapter, you learned how to:

- Configure the Reference and Comparison dataset columns.
- Rename output columns using Output Labels.
- Organize the output column order.
- Select the Compare Columns.
- Configure the output filename.
- Save the configuration as a Saved Setup.

Next Chapter

The next chapter explains the **Saved Setup** feature in greater detail.

Chapter 8 – Saved Setup

Purpose

This chapter explains how to create, load, manage, export, and import a **Saved Setup**.

Saved Setups preserve assessment configuration settings so that frequently used assessments can be configured consistently and efficiently.

What Is a Saved Setup?

A Saved Setup preserves all configuration selections made during assessment setup, allowing the same configuration to be quickly reused for future assessments.

Loading a Saved Setup restores the saved configuration, eliminating repetitive setup tasks while helping ensure consistent assessment configuration and reporting across projects.

Best Practice: Create a Saved Setup for each assessment type you perform regularly. Use descriptive names that clearly identify the purpose of the setup.

Creating a Saved Setup

To create a new Saved Setup:

1. Configure the Column Mapping window for the assessment.
2. Select **Save As**.
3. Enter a descriptive name for the setup.
4. Save the Setup.

The new setup is added to the **Saved Setup** drop-down list and is available for future assessments.

Best Practice: Use descriptive Saved Setup names that clearly identify the assessment being performed. Consistent naming makes it easier to locate and reuse the correct configuration, particularly when multiple Saved Setups are available.

Loading a Saved Setup

To use an existing Saved Setup:

1. Select the desired setup from the **Saved Setup** drop-down list.
2. Select **Load**.
3. Review the saved setup configuration and make any desired changes before selecting Apply.
4. Select **Apply** to use the configuration and return to the main PRISM ERI window.

Important: Selecting a Saved Setup from the drop-down list does **not** load the configuration. After selecting a Saved Setup, select **Load** to retrieve the saved configuration into the Column Mapping window. You may then review or modify the configuration before selecting **Apply**.

Reviewing a Loaded Setup

After loading a Saved Setup, review the configuration before applying it.

Verify that:

- The correct output columns are selected.
- Output Labels are appropriate.
- The output order is correct.
- The Reference and Comparison Compare Columns are correct.
- The Output File Name Column is appropriate for the current Comparison dataset.
- The selected setup is suitable for the current assessment.

Important: A Saved Setup restores the previously saved configuration. Before selecting **Apply**, verify that the configuration is appropriate for the current assessment. See **Chapter 7 – Column Mapping** for guidance on verifying the selected columns and Compare Columns.

Best Practice: Review every loaded Saved Setup before running an assessment, particularly when using new datasets or data exported from a different source.

Renaming a Saved Setup

Use **Rename** when the existing setup name no longer clearly describes its purpose.

To rename a setup:

1. Select the setup from the drop-down list.
2. Select **Rename**.
3. Enter the new name.
4. Save the setup.

Note: Renaming a setup changes its name without changing the saved assessment configuration.

Deleting a Saved Setup

Saved Setups that are no longer needed may be removed.

To delete a setup:

1. Select the setup from the drop-down list.
2. Select **Delete**.
3. Confirm the deletion.

Important: Delete a Saved Setup only when you are certain it is no longer needed. A deleted setup must be recreated or reimported before it can be used again.

Exporting a Saved Setup

Saved Setups can be exported for backup or shared with other PRISM ERI users.

To export a Saved Setup:

1. Select the desired setup from the drop-down list.
2. Select **Export**.
3. Choose where the exported setup file will be saved.
4. Provide the exported file to the appropriate team members.

Note: Exporting a Saved Setup creates a copy of the setup. The original Saved Setup remains available within PRISM ERI.

Importing a Saved Setup

An exported Saved Setup can be imported into another PRISM ERI installation.

To import a setup:

1. Select **Import**.
2. Browse to the exported Saved Setup file.
3. Import the file.
4. Select the imported setup from the drop-down list.
5. Select **Load**.
6. Review the configuration.
7. Select **Apply**.

Note: Importing a Saved Setup allows users to quickly begin with an established assessment configuration, reducing setup time and promoting consistent assessments across projects and engineering teams.

Using Saved Setups Across a Team

Saved Setups help organizations standardize how assessments are configured.

A lead user can create and validate a standard setup, export it, and distribute it to other team members. Each team member can then import and load the same setup before performing assessments.

This can help provide:

- Consistent Column Mapping
- Consistent output structure
- Standardized Output Labels
- Repeatable Compare Column selections

- Consistent report naming
- More uniform assessment results across projects

Best Practice: Establish approved Saved Setups for common assessment types and distribute them to all engineers performing those assessments. Using standardized Saved Setups helps ensure consistent assessment configuration, reporting, and assessment results across projects.

When a Saved Setup Should Be Updated

A Saved Setup may need to be revised when:

- The exported dataset structure changes.
- Column names are changed.
- Additional output information is required.
- The preferred output order changes.
- A different Compare Column is needed.
- The Output File Name Column changes.

Important: Whenever the exported engineering data or assessment requirements change, review and update the Saved Setup before using it for production assessments.

Applying the Loaded Configuration

After loading and reviewing the Saved Setup, select **Apply** to use the configuration and return to the main PRISM ERI window.

The loaded settings will then be used for the assessment.

Chapter Summary

In this chapter, you learned how to:

- Create a Saved Setup.
- Load and review an existing Saved Setup.
- Rename or delete Saved Setups.
- Export Saved Setups for backup or team use.
- Import Saved Setups created by another user.
- Use Saved Setups to support repeatable and consistent assessments.
- Apply a loaded configuration before returning to the main PRISM ERI window.

Next Chapter

The next chapter provides information to better understand the assessment results.

Chapter 9 – Understanding Results

Purpose

This chapter explains how to interpret the PRISM ERI assessment results and use them to perform an effective engineering review.

By the end of this chapter, you will understand how assessment results are organized, how to interpret match confidence, and how to identify requirements that require additional engineering review.

The Assessment Workbook

Each assessment produces a Microsoft Excel workbook containing the assessment results.

The workbook includes the Reference and Comparison information selected during **Column Mapping**. The output columns, Output Labels, and column order reflect the configuration defined for the assessment.

The engineering data selected as the **Reference Compare Column** and **Comparison Compare Column** includes redlines that highlight differences between the matched requirements, making it easier to identify additions, deletions, and revisions.

Any unmatched requirements are displayed at the end of the assessment workbook for further engineering review.

The assessment workbook is the primary deliverable produced by PRISM ERI and is intended to support engineering review and decision making.

Figure 9.1. shows a representative portion of a **Reference Anchored** assessment workbook.

Figure 9.2. shows a representative portion of a **Comparison Anchored** assessment workbook.

Requirement Document	Special Codes	Requirement ID	Requirement Text	CA-Requirement	Special Code	Comparison Dataset - Requirement Text
Access Control Specification	Cyber Security	ACS-020	ACS servers and operator workstations shall synchronize system time using redundant facility-approved NTP sources.	7.2.2	Cyber Security	ACS servers and operator workstations shall synchronize system time using redundant facility-approved NTP sources.
Access Control Specification	Cyber Security	ACS-021	The ACS shall support anti-passback logic to prevent credential sharing and unauthorized re-entry.			
Access Control Specification	Cyber Security	ACS-022	The ACS credential database shall be automatically backed up daily to a secure redundant storage location.			
Access Control Specification	Safety	ACS-023	The ACS shall generate a forced-open alarm when a controlled door remains open longer than the configured timeout period.			
Access Control Specification	Cyber Security	ACS-024	Central ACS servers shall be deployed in a redundant primary-secondary architecture with automatic failover.			
Access Control Specification	nan	ACS-025	The ACS shall support integration with the video management system for alarm-triggered video association.			
Facility Security Systems Specification	Cyber Security	FSS-101	Security system servers and operator workstations shall synchronize time using redundant facility-approved NTP sources.	7.2.2	Cyber Security	ACS servers and operator workstations shall synchronize system time using redundant facility-approved NTP sources.
Facility Security Systems Specification	nan	FSS-102	Facility security system field panels, door controllers, IP card readers, and biometric readers shall connect to the security network using managed Ethernet switches.	7.1.4	nan	All ACS field panels, intelligent door controllers, IP-based card readers, and biometric readers shall connect to the PROJECT security network using managed Layer 3 Ethernet switches.
Facility Security Systems Specification	Cyber Security	FSS-103	Security devices shall be installed on a dedicated VLAN separated from business, wireless , and process control networks.	7.3.4	Cyber Security	ACS devices shall reside on a dedicated VLAN separated from business networks and process control networks.
Facility Security Systems Specification	nan	FSS-104	Security control panels shall include surge protection on power, communications, and field I/O circuits.			
Facility Security Systems Specification	Safety	FSS-105	Card readers and field security devices installed in hazardous classified areas shall be certified for the applicable area classification.			
Facility Security Systems Specification	nan	FSS-106	Security control panel power systems shall include regulated DC power supplies mounted in lockable enclosures with protected outputs .	7.1.2	nan	The access control panel power system shall include the following: each ACS control panel shall be powered from a dedicated 48 VDC regulated power supply ; power supplies shall be mounted in lockable enclosures; and each power supply output shall be protected against overcurrent .

Figure 9.1. Example Reference Anchored Assessment Workbook

Requirement Document	Special Codes	Requirement ID	Requirement Text	CA - Requirement	Special Code	Comparison Dataset - Requirement Text
Facility Security Systems Specification	nan	FSS-106	Security control panel power systems shall include regulated DC power supplies mounted in lockable enclosures with protected outputs.	7.1.2	nan	The access control panel power system shall include the following: each ACS control panel shall be powered from a dedicated 48 VDC regulated power supply; power supplies shall be mounted in lockable enclosures; and each power supply output shall be protected against overcurrent.
Access Control Specification	nan	ACS-003	Each ACS control panel shall be powered from a dedicated 24 VDC regulated power supply.	7.1.2	nan	The access control panel power system shall include the following: each ACS control panel shall be powered from a dedicated 48 VDC regulated power supply; power supplies shall be mounted in lockable enclosures; and each power supply output shall be protected against overcurrent.
Access Control Specification	nan	ACS-018	ACS control panels shall include surge protection for power and communication interfaces.	7.1.3	nan	ACS control panels shall include surge protection for all power, communication, and I/O interfaces.
Access Control Specification	Cyber Security	ACS-001	All ACS field panels, intelligent door controllers, and IP-based card readers shall connect to the facility security network using managed Ethernet switches.	7.1.4	nan	All ACS field panels, intelligent door controllers, IP-based card readers, and biometric readers shall connect to the PROJECT security network using managed Layer 3 Ethernet switches.
Facility Security Systems Specification	nan	FSS-102	Facility security system field panels, door controllers, IP card readers, and biometric readers shall connect to the security network using managed Ethernet switches.	7.1.4	nan	All ACS field panels, intelligent door controllers, IP-based card readers, and biometric readers shall connect to the PROJECT security network using managed Layer 3 Ethernet switches.
Access Control Specification	Cyber Security	ACS-020	ACS servers and operator workstations shall synchronize system time using redundant facility-approved NTP sources.	7.2.2	Cyber Security	ACS servers and operator workstations shall synchronize system time using redundant facility-approved NTP sources.
Facility Security Systems Specification	Cyber Security	FSS-101	Security system servers and operator workstations shall synchronize time using redundant facility-approved NTP sources.	7.2.2	Cyber Security	ACS servers and operator workstations shall synchronize system time using redundant facility-approved NTP sources.
Facility Security Systems Specification	nan	FSS-109	Security enclosures, access control panels, reader junction boxes, and power supply cabinets shall include supervised tamper circuits.	7.2.3	nan	The ACS enclosure monitoring design shall include supervised tamper circuits on control enclosures, reader junction boxes, field panels, and power supply cabinets. Opening of a protected ACS enclosure shall generate both local and central security alarms.

Figure 9.2. Example Comparison Anchored Assessment Workbook

Comparison Anchored Output

The **Comparison Anchored** strategy organizes the assessment workbook using the order of the **Comparison dataset**.

For each Comparison requirement, PRISM ERI identifies every matching requirement within the Reference dataset(s). Matching requirements are those that share the same engineering intent, allowing engineers to quickly determine where similar requirements exist.

This strategy is commonly used to:

- Compare document revisions.
- Review project specifications.
- Evaluate vendor documents.
- Identify duplicate or overlapping requirements across multiple Reference datasets.

Requirements with no suitable match are displayed after the matched results. Unmatched Comparison requirements may represent:

- New requirements
- Project-specific requirements
- Additional engineering information
- Requirements requiring further review

Reference Anchored Output

The **Reference Anchored** strategy also presents the assessment results using the order of the **Comparison dataset**. However, when a Comparison requirement matches a requirement within a Reference dataset, **the entire Reference dataset is included in the assessment workbook**, including requirements that did not match.

Including the complete Reference dataset allows engineers to review the entire engineering standard rather than only the matched requirements. This provides valuable context and makes it easier to determine whether important requirements were omitted from the Comparison dataset.

After filtering the assessment workbook to a specific Reference dataset, the remaining requirements follow the natural order of that Reference document. Reviewing the requirements in their original sequence makes it much easier to identify missing requirements, gaps, and other critical engineering information.

This strategy is commonly used to:

- Verify standards compliance.
- Identify missing requirements.
- Review Environmental, Safety, Security, and other critical engineering requirements.
- Confirm that applicable Reference requirements have been incorporated into the Comparison dataset.

Recommended Assessment Workflow

For most assessments, begin with the **Comparison Anchored** strategy.

Comparison Anchored results quickly identify the Reference datasets that are most applicable to the Comparison dataset. Depending on the organization, a Comparison requirement may match requirements contained within many different Reference datasets. In practice, however, engineers often determine that only a small number of those Reference datasets are truly applicable.

After identifying the most relevant Reference datasets:

1. Run the assessment again using the **Reference Anchored** strategy.
2. Filter the assessment workbook to the desired Reference dataset(s).
3. Review the complete Reference dataset(s), including unmatched requirements, to identify potentially missing critical requirements or engineering information.

This two-step workflow allows engineers to first determine **which Reference datasets are applicable**, then determine **what important engineering information may be missing** from the Comparison dataset.

Best Practice: Begin with a Comparison Anchored assessment to identify the most relevant Reference datasets. After narrowing the assessment to the applicable Reference datasets, perform a Reference Anchored assessment to identify missing requirements, verify standards coverage, and review the complete Reference dataset for additional applicable requirements.

Next Chapter

The next chapter explains how Batch Processing works.

Chapter 10 – Batch Processing

Purpose

This chapter explains how to use **One-to-Many Batch** mode to automatically assess multiple Comparison datasets against a common set of Reference datasets.

By the end of this chapter, you will understand when Batch Processing should be used, how PRISM ERI processes multiple datasets, and what to expect from the assessment results.

What Is Batch Processing?

Batch Processing allows PRISM ERI to automatically perform the same assessment on multiple Comparison datasets using a single assessment configuration.

Batch Processing uses the same assessment workflow described in **Chapter 7 – Running an Assessment**. The primary difference is that the Comparison Dataset is a folder containing multiple datasets rather than a single dataset.

In most organizations, the **Reference datasets** represent an engineering knowledge library containing corporate standards, industry standards, specifications, design guides, or other engineering reference information. The **Comparison datasets** represent the engineering information being evaluated against that reference library, such as project specifications, vendor documents, verification data, or revised engineering documents.

Rather than manually assessing each Comparison dataset individually, PRISM ERI automatically processes every applicable Comparison dataset contained within the selected Comparison folder.

Each Comparison dataset is independently assessed against the selected Reference dataset(s), and a separate Microsoft Excel workbook is generated for each assessment.

Best Practice: Before processing a large batch of Comparison datasets, perform an assessment using one representative dataset and review the results. After confirming that the assessment configuration produces the desired output, process the remaining Comparison datasets using the same assessment configuration.

Assessment Results

PRISM ERI generates a separate Microsoft Excel workbook for each Comparison dataset processed during the Batch assessment.

Each assessment workbook contains the same information that would be produced if the Comparison dataset were assessed individually. This includes the selected output columns, redlined Compare Columns, and any unmatched requirements.

The output workbook name is determined by the selected **Output File Name Column** when configured. Otherwise, the original Comparison dataset filename is used.

Monitoring Batch Progress

During Batch Processing, PRISM ERI displays the current processing status as each Comparison dataset is assessed.

Depending on the number and size of the selected datasets, Batch assessments may require additional processing time.

If necessary, select **Stop Assessment** to stop processing. Any completed assessment workbooks remain available in the selected output folder.

Note: Stopping a Batch assessment does not delete assessment workbooks that have already been generated. Previously completed assessment workbooks remain available in the selected output folder.

Chapter Summary

In this chapter, you learned how to:

1. Use Batch Processing to automatically assess multiple Comparison datasets.
2. Process an engineering knowledge library against many Comparison datasets using a single assessment configuration.
3. Generate an individual assessment workbook for each Comparison dataset.
4. Monitor Batch assessment progress and stop processing when necessary.

Next Chapter

The next chapter provides guidance for preparing engineering datasets and configuring assessments to produce the most accurate and useful results.

Chapter 11 – How to Get the Best Results from PRISM ERI

Purpose

This chapter provides practical guidance for producing accurate, meaningful, and consistent assessment results. While PRISM ERI automates the comparison of engineering datasets, the quality of the assessment ultimately depends on selecting the appropriate data, configuring the assessment correctly, and understanding the engineering information being evaluated.

The recommendations in this chapter are based on practical experience performing engineering assessments across a wide variety of datasets and project types.

Understand Your Engineering Data

Before configuring an assessment, take time to understand the engineering data being compared.

Engineering datasets often originate from different organizations, projects, or requirements management systems. Although two datasets may appear similar, they frequently contain differences in structure, terminology, and engineering intent.

Understanding the source of the data helps ensure the correct information is compared and reduces the likelihood of producing misleading assessment results.

Best Practice: Review both datasets before configuring an assessment. Confirm that the selected Compare Columns contain the engineering information you intend to evaluate.

Select the Appropriate Compare Columns

The Compare Columns determine which engineering information PRISM ERI evaluates when searching for matching requirements.

Selecting the wrong Compare Columns is one of the most common causes of poor assessment results. Columns containing requirement text, functional descriptions, or engineering statements typically produce the best results. Administrative information such as document numbers, revision levels, approval status, or owner names generally should not be selected as Compare Columns.

If multiple descriptive columns are available, evaluate each one to determine which contains the most complete engineering information.

Important: PRISM ERI compares only the information contained within the selected Compare Columns. Any engineering information stored in other columns is available for review in the output workbook but is not used during the assessment.

Include Helpful Supporting Information

Although supporting columns are not used to determine engineering matches, including them in the output workbook often makes the assessment results easier to review.

Useful supporting information may include:

- Requirement ID
- Document Number
- Discipline
- Category
- Verification Method
- Source Document
- Revision

Providing this information allows engineers to quickly identify the origin of each requirement and better understand the assessment results without repeatedly referring back to the original datasets.

Choose the Appropriate Assessment Strategy

PRISM ERI provides two Anchor Strategies, each designed to support a different review objective.

Use **Comparison Anchored** assessments when evaluating project documents, vendor documents, revisions, or verification data against an engineering reference library. This approach is typically used to identify matching requirements and review changes.

Use **Reference Anchored** assessments when verifying that an engineering standard or reference document has been adequately addressed. Because the complete Reference dataset is included in the output workbook, this strategy is particularly effective for identifying missing or unmatched critical requirements in the Comparison dataset.

Selecting the appropriate Anchor Strategy before beginning an assessment reduces the need to rerun assessments later.

Start with a Representative Dataset

When assessing large numbers of Comparison datasets, begin by processing a single representative dataset.

Review the assessment results carefully to confirm that:

- The correct Compare Columns were selected.
- The output contains the desired supporting information.
- The assessment configuration produces the expected results.

Once satisfied with the configuration, process the remaining Comparison datasets using the same assessment configuration.

Best Practice: Validating the assessment configuration with a single representative dataset is significantly more efficient than reviewing the results from dozens or hundreds of completed assessments.

Reuse Saved Setups

Saved Setups help ensure assessments are performed consistently across projects and engineering teams.

Once a Saved Setup has been verified, it can be reused whenever similar engineering datasets are assessed. This reduces configuration time while helping ensure that output columns, Compare Columns, and other assessment settings remain consistent.

Organizations performing recurring assessments are encouraged to establish standardized Saved Setups for commonly used engineering datasets.

Review the Assessment Results

PRISM ERI is designed to identify likely engineering relationships across large datasets. While the software significantly reduces the time required to locate similar requirements, it does not replace engineering review.

Assessment results should always be evaluated within the context of the project, applicable standards, customer requirements, and engineering intent.

The highest quality assessments are achieved when experienced engineers combine PRISM ERI's automated analysis with their own technical knowledge and professional judgment.

Important: PRISM ERI helps identify where engineers should focus their review. Final engineering decisions should always be based on technical evaluation and engineering judgment.

Lessons Learned – Common Mistakes to Avoid

One of the most common mistakes is assuming that an assessment is ready to process simply because the assessment is configured. Spending a few minutes validating the assessment with a representative dataset almost always saves time later.

Before processing a large assessment, verify that:

- The correct **Compare Columns** have been selected.
- Similarly named columns actually contain the same engineering information.
- The output workbook includes the supporting information needed for engineering review.
- The selected Reference datasets are the correct versions for the assessment.
- The assessment results accurately reflect the engineering relationships you expect to see.

Once the assessment has been validated, the same configuration can be confidently applied to the remaining Comparison datasets.

Chapter Summary

In this chapter, you learned how to:

- Prepare engineering datasets for effective assessments.
- Select appropriate Compare Columns.
- Include supporting information that improves result interpretation.
- Choose the appropriate assessment strategy.
- Validate assessment configurations before processing large batches.
- Use Saved Setups to improve consistency.
- Apply engineering judgment when reviewing assessment results.

Chapter 12 – Troubleshooting

Purpose

This chapter provides a quick reference for resolving common issues that may occur while using PRISM ERI.

For detailed guidance on preparing datasets and configuring assessments, refer to **Chapter 12 – How to Get the Best Results from PRISM ERI**.

Quick Troubleshooting Guide

Issue	What to Check
PRISM ERI does not start	Confirm that PRISM ERI is installed correctly and that a valid license has been imported.
The license is invalid	Confirm that the license was issued for the current computer and has not expired.
The selected dataset will not load	Confirm that the file is a supported Microsoft Excel workbook and is not open or restricted by another application.
Expected columns do not appear in Column Mapping	Confirm that the correct workbook was selected and that the column headings are located in the expected header row.
No matches are found	Verify the selected datasets and confirm that the correct Compare Columns were selected.
The results do not appear reasonable	Review the Compare Columns, selected Reference datasets, and assessment configuration. Test the configuration using a representative dataset.
The output workbook is missing information	Review the selected output columns and Output Labels in Column Mapping.
The output workbook cannot be created	Confirm that the output folder is accessible and that a workbook with the same name is not currently open.
The assessment takes longer than expected	Confirm whether PRISM ERI is rebuilding the semantic search index and consider the size and number of datasets being processed.
A Batch assessment stops before all files are processed	Review the processing status, confirm that the Comparison files use a compatible structure, and retry the affected dataset individually.
A Saved Setup does not produce	Load the Saved Setup, review all selections, and confirm that the

Issue	What to Check
the expected configuration	dataset column names have not changed.

If No Matches Are Found

First verify the following:

- The correct Reference and Comparison datasets were selected.
- The selected Compare Columns contain the engineering text intended for evaluation.
- The selected columns are not limited to identifiers, document numbers, status fields, or other administrative information.
- The loaded Saved Setup is compatible with the current datasets.

If the datasets or column structure have changed, update the Column Mapping before rerunning the assessment.

If the Output Workbook Is Not Created

Confirm that:

- The selected output folder exists and is accessible.
- The output workbook is not already open in Microsoft Excel.
- A file with the same name is not write-protected.
- The user has permission to save files in the selected location.

After correcting the issue, rerun the assessment.

If a Batch Assessment Encounters a Problem

When a Batch assessment does not complete as expected, run the affected Comparison dataset individually.

Processing the dataset individually can help determine whether the issue is related to:

- The dataset structure.
- Missing or renamed columns.
- A workbook-specific problem.
- The Batch assessment configuration.

Best Practice: When one dataset fails during Batch Processing, test that dataset individually before changing the configuration used for the entire batch.

Chapter Summary

This chapter provided a quick reference for identifying and resolving common issues involving:

- Application startup and licensing.
- Dataset and Column Mapping problems.
- Unexpected or missing assessment results.
- Output workbook creation.
- Assessment performance.
- Batch Processing.
- Saved Setups.

Chapter 13 – Additional Services

Organizations that would like additional assistance with PRISM ERI may request professional services such as:

- Initial user or team training
- Workflow consultation for integrating PRISM ERI into existing engineering processes

For information about available training services, licensing, or product demonstrations, please contact:

Website: <https://prism-eri.com>

Email: keith@prism-eri.com

Thank You

Thank you for choosing PRISM ERI. We hope this User Guide helps you quickly become proficient with the software and supports more efficient, consistent engineering requirements assessments.

We appreciate your feedback and wish you continued success with your engineering projects.