

Control and visibility: the keys to a successful change management process

The Payoff

- Automates and optimizes your change process
- Integrates your CAD software to increase collaboration
- Centralizes your documents for easy access

The Basics

Changing a product is an extremely important business decision. OnBase lets you follow a process that controls and simplifies change requests. You determine the attainability, create a plan, evaluate the plan and then implement the plan. The solution gives you visibility into the process and an auditable history documenting all the changes made and the approvals they received. It also integrates the technologies you use every day, so you can get more out of applications like CAD.

It's all about access to a complete picture of what's happening, when and why.

The Challenges

Engineering change management can be a complex and involved process. There are many steps and numerous people involved – both inside and outside the organization. Difficulties include:

- Inefficient manual and paper-based processes that inhibit controls and add costs
- Lack of visibility into the entire change process
- Poor integration of systems – like CAD or PLM – that reduces effective collaboration

The Solution

Implementing change in a controlled manner is the key to any change process. Leveraging the OnBase enterprise content management (ECM) solution gives you that control, while fostering collaboration and communication both internally and externally. With OnBase, you connect related business content with design drawings – even complex, compound CAD files. Empowering engineers to retrieve, modify and archive drawings into OnBase without leaving their familiar CAD environment reduces the time of the overall change process, aligning it with lean initiatives.

Automate processes to increase control and decrease your reliance on paper and manual activities

The OnBase Engineering Change Management solution speeds business processes that are traditionally manual by removing the reliance on paper. Stakeholders kick off the process by electronically submitting changes that are automated by a workflow. Then, employees with the proper credentials easily access all the file types needed – emails, files, notes, diagrams and drawings – from a central database, saving time spent searching for documentation while decreasing storage costs. The flexibility of OnBase also lets you access what you need from your CAD application.

Increase visibility, guarantee everyone is working with correct versions of files

Automating change management streamlines the process, minimizes errors and ensures employees are referencing the proper version of files and drawings. Easily configurable workflows automatically route electronic documentation through each step of the process, notifying the proper people and removing risks due to errors.

OnBase also provides an audit history from creation of the change to completion. The increased visibility helps you stay compliant with regulations and reduces the incidence of material weakness. It also lets you internally audit the organization's resources so you utilize them to their fullest potential, further cutting down on waste.

Integrate systems – including CAD and PLM – to improve collaboration and communication

OnBase's flexible integration lets you store and access files in OnBase, so you don't have to purchase expensive CAD licenses for viewing. Engineers still make changes in CAD or PLM, but since stakeholders see "read-only" copies of drawings, you ensure the integrity of your files. The audit trail shows the changes, which don't affect original drawings and documents. This fosters collaboration without sacrificing changes that are in progress.

Instead of long email threads or photocopied documents with writing all over them, there's an audit trail showing exactly what happened, who did it, when and why. The solution also lets you search globally for a part number that you've modified, then automatically note the change in all the files referencing that part.

Once the process begins, instead of manually sending changes, anyone can send a quick e-form to the engineer, speeding up the process even more. People who need to see works-in-progress do so easily, so there's no confusion, which reduces bottlenecks. You communicate and document throughout the process, instantly putting everyone on the same page.

OnBase is easy to implement and it integrates with most software – without custom coding. Integrating with OnBase eases transitions to new software, improves user adoption and satisfaction and eliminates switching between screens to find the right information. It also allows for faster document indexing which increases content capture speeds and eliminates the risk of error from manual entry.

The OnBase Engineering Change Management solution ensures that your organization follows a process when altering products. The enhanced communication and collaboration improves quality, which increases customer satisfaction, and that increases sales.

Why OnBase?

No matter the file type, OnBase captures it, processes it, securely stores it, manages revisions of it and automatically routes it through the process – all while providing you with a complete history. So you keep your focus on designing, manufacturing and enhancing products for your customers, instead of searching for documents.

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