



Optimizing Solidworks PDM Implementation

When multiple employees of a Fortune 100 medical equipment manufacturing company reached out to us for support with workflow functions and permissions, we knew there was a better way. Rather than fixing the issues that would inevitably keep occurring with their current system, we resolved the root of the problem.

“OUR EMPLOYEES KEPT ENCOUNTERING THE SAME ISSUES, ULTIMATELY LEADING SPK TO REEVALUATE OUR SYSTEMS. WITHOUT THEIR HELP, OUR TRAINING WOULD REMAIN INEFFICIENT, LEADING TO INTERRUPTIONS AND OTHER UNNECESSARY COMPLICATIONS.

R&D Manager

CHALLENGES

When working with this company, two main components were evident from employee complaints. The first was engineers and the design team were getting blocked from using the PDM system while waiting for other users to correct issues. This is because many users received engineering-level permissions, leading them to make unintentional changes that resulted in interruptions.

SPK received many complaints about this issue, leading us to the second component. We concluded that the PDM training that new employees were provided was inadequate. New hires were not being onboarded with consistent training materials, leading many to try and teach themselves how to use the system with what they could find online. As these materials were not shared with employees or required to learn, many new employees encountered issues with workflow functions and permissions. This resulted in our staff receiving continuous tickets to resolve.

SOLUTION

The main problem was a lack of training. Our solution was to create a general training plan for the company to enact. This plan included practical PDM training PowerPoints that detailed nuances regarding workflows, permissions, and customized add-ins. In addition to the slideshows, the training was specifically designed for certain groups. For example, a document control user would have training catered to their role. As these trainings were drafted, we shared them with the client, altering anything they desired to change. Along with this, permission groups were updated to ensure certain individuals could not accidentally interrupt workflows. Our team used existing permission data as well as historical data gathered from SQL to make successful permission decisions.

OUTCOMES

Once our training events were created and implemented, commonly reported issues were now being prevented. This business went from 9 tickets a month asking for assistance with these issues to just 1. Furthermore, updating permission settings and training led to 60% fewer interruptions. Although training times were slightly longer, this attention to detail saved the manufacturing company hundreds. Ultimately, SPK led this Fortune 100 company to operate more efficiently with fewer distractions to teams that can help develop their products.



ISSUES LESSENERD FROM 9/MONTH TO 1



60% FEWER INTERRUPTIONS



NEW TRAINING SAVED HUNDREDS OF DOLLARS