

Case Study Warehouse Equipment Manufacturer

CASE STUDY

Complex machines present unique challenges for organizations from the 'drawing board', through manufacture, delivery and ongoing servicing.

The Problem

Company A is a major player in the global fulfillment and warehousing industry. They create customized order fulfillment solutions, including warehouse parts handling equipment, for hundreds of sites.

While **Company A** creates generic designs, every warehouse uses different combinations and variants of parts. Creating and delivering the right information for each site was overwhelming.

Parts and service content was hard to manage

Generic parts and service content was written in MS Word and manually merged with illustrations that identified parts. The content was delivered over the web in PDF format. Sometimes content was manually customized for specific sites.

Creating content was inefficient and time consuming, and the service documentation was hard to use — making it difficult to maintain machines and to identify and order replacement parts.

Updating information was slow and labor intensive — changes were manually detected and inserted. The documents were static and almost impossible to keep up to date.

As with any manual update process, something could be missed and errors could creep in. Additionally, orders of incorrect or outdated parts caused delays, expense, and frustration.

The need for change

Company A needed a new approach to efficiently generate site-specific parts and service content, automate IPC (Illustrated Parts Catalog) generation, and provide timely, accurate content to their customers with an integrated shopping cart experience.

This would streamline the parts ordering process, increase revenue from after-market parts, and reduce support costs.

The Solution

Company A selected a solution from Bluestream using *XDocs DITA CCMS* and *XDocs Manufacturing Suite*. They can now provide IPCs (Illustrated Parts Catalogs) and service documentation to its customers based on exactly what was supplied and installed.

IPCs (Illustrated Parts Catalogs)

IPCs allow engineers to easily identify a particular component utilising General Assembly, Sub-Assembly and exploded component drawings.

When delivered electronically an IPC can be easily linked to a fulfilment system. This enables engineers in the field to instantly request replacement parts directly from the manufacturer. IPCs reduce the chance of the wrong part being ordered and create a valuable revenue stream.

CCMS/Authoring environment

XDocs DITA CCMS is an enterprise class component content management system. Embracing open standards where possible, and designed for flexibility it has been deployed all over the world.

Moving to structured authoring and DITA has brought immediate benefits. Using XML separates the content from the formatting, and allows for content to be published in various formats including PDF for print and XHTML/HTML5 for online.

It is now much easier to reuse content, and significant savings have been made on localization.

Automated image processing

With *XDocs Manufacturing Suite*, **Company A** can import an 'as-built' BOM from their ERP system for any customer site. CAD diagrams are automatically processed to link call-outs from parts in the illustration to the BOM content.

Dynamic publishing

XDocs Manufacturing Suite merges the BOM content and diagrams to dynamically publish customer and site-specific Illustrated Parts Catalogs to the *XDelivery Interactive Service Documentation Portal*. These IPCs have shopping cart functionality which

can be linked to the parts ordering system and the CRM system.

Content can be edited and updated dynamically.



IPC preview

Unifying parts and service information

Parts data is also available for use in other documentation types, for example installation and maintenance manuals. As a result, parts data in the service documentation is linked directly to the IPC on the service portal. Since parts information is now managed in a content creation engine, it is also available for integration into training materials.

Multilingual parts ordering site

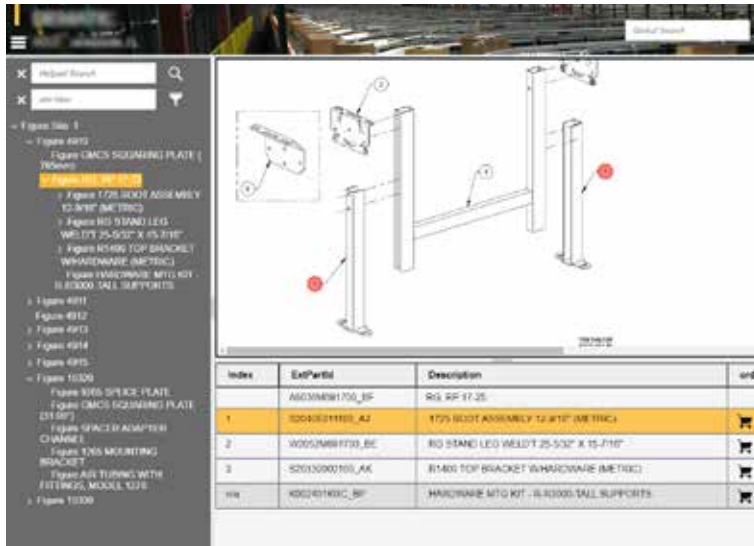
XDocs DITA CCMS' integration with Translation Management Systems enables **Company A** to manage parts content in multiple languages and publish to a multilingual parts ordering site.

Improving the customer experience

When a customer, or technician is on site, spare parts information is provided via the *Interactive Service Documentation Portal* for their as-installed system. Using IPCs, they can easily identify and order the exact parts needed through their online platform via a laptop or mobile device.

In addition to clicking interactive diagram call-outs, the *Interactive Service Documentation Portal* supports full text search and search by parameters included in the parts content, for example part number or part name.

This functionality increases spare parts sales through an improved ordering experience with precise, easily accessible information. The shopping cart links directly to the corporate e-commerce site.



IPCs make identifying the correct part a simple task.

Improving the content creator's experience

With *XDocs Manufacturing Suite*, customized content for each site can be generated quickly and easily. Content is 100% accurate and synchronized between the ERP, the service documentation, the IPC, and the CRM system.

The process of linking hot spot diagrams and parts tables is substantially automated, and publishing to the *Interactive Service Documentation Portal* is a simple task.

Catalogers and technical writers are able to work more efficiently and productively, improving time to market by rapidly producing accurate, customized information and delivering it to the right customer in the right medium.

Timely, simple content updates

For quick updates, catalogers can add or change content in the Catalog Editor before publishing or updating the IPC. For more comprehensive changes, the BOM can be reimported. *XDocs Manufacturing Suite* automatically versions all content, allowing auto-detection of changes.

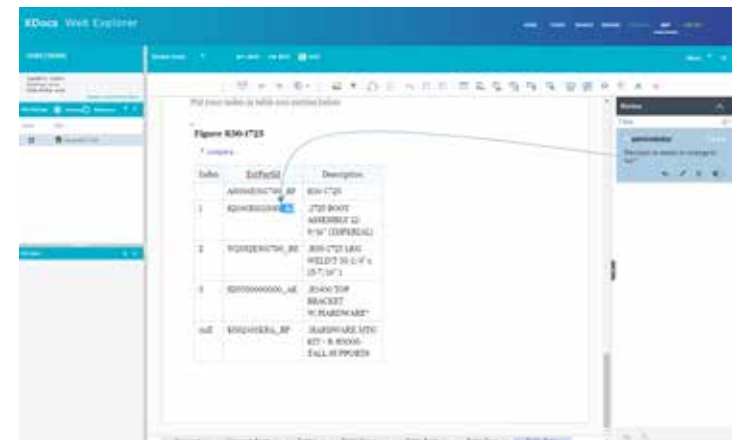
Simple reviews

XDocs Manufacturing Suite also supports browser based review of all content prior to publishing.

SMEs (Subject Matter Experts) can be easily incorporated into review cycles using *XDocs WEX* – a simple to use browser based review and collaboration application.



Screenshots of review using WEX



Interactive Service Documentation Portal

Bluestream have developed their own delivery platform that links directly to the core XDocs database. Customers can use this platform to create interactive service delivery portals where all technical documentation can be made available to customers and engineers according to permissions.



Storage Systems



Conveyor Systems



Robot Systems



Training Material

Benefits

With *XDocs DITA CCMS* & *XDocs Manufacturing Suite* you control the flow of 'Service Information' from Engineering to Fulfilment:

- Enhance the end user product experience
- Create better documentation faster, reuse content with confidence and update information with ease.
- Create precise customizable Illustrated Parts Catalogs for each customer site.
- Build IPCs, Maintenance Schedules, Installation Guides etc. and localize them to any language.
- Increase parts sales and reduce errors in parts ordering.
- Make service engineers, catalogers, technical writers and service parts managers more productive.
- Full control of the information flow:
 - Audit trail – what was changed, when' by who.
 - Instant comparison between versions.
- A streamlined workflow for producing integrated service documentation.
- Rapid information updates (to all output formats i.e. IPC, Doc, Maintenance Schedules).
- Helps ensure data consistency and integrity.
- Eliminates system redundancy.
- Build fully customizable Web-based Delivery Portals.

About Bluestream

Bluestream are the developers of *XDocs DITA CCMS*, a fully compliant DITA 1.3 Component Content Management System (CCMS).

XDocs DITA CCMS is the leading single vendor solution for organizations looking to improve and enhance their information workflow. With a unique rapid to deploy methodology coupled with unrivalled functionality, *XDocs DITA CCMS* is inspiring teams of authors to create powerful user-focused content that can be flexibly delivered to any device or platform.

In business since 2013, Bluestream helps manufacturing companies deliver interactive spare parts catalogs and service information portals.

Find out how XDocs can revolutionize your content.

Contact us today at info@bluestream.com.