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Shift Your Change Processes to a Higher Gear with Fusion Lifecycle

Peter Van Avondt
Autodesk

Lee Dodds
Autodesk

Learning Objectives

- Learn about the out-of-the-cloud change management solution of Fusion Lifecycle.
- Learn how to extend the solution with complementary apps from the Fusion Lifecycle App Store.
- Explore how other stakeholders can easily be included in change management workflows.
- Discover how engineering change workflows can integrate with Vault.

Description

Effective change management is critical to deliver your products and projects on time, with the right quality and within budget. Throughout the product lifecycle many changes can happen. Change management isn't just for engineering and manufacturing but also other stakeholders such as suppliers, service, and so on. In this class you will see how Fusion Lifecycle software can help you take control of change by offering a collaborative environment where product changes are fully defined, reviewed, approved, and implemented. We will show you the out-of-the-box workflows and see how we can easily extend them to respond to change requests in time, quickly discover and assess the scope of changes, learn the complete change history log, and manage team activities in context of your change activities.

Speaker(s)

Peter Van Avondt | Technical Sales Specialist – Autodesk Northern Europe

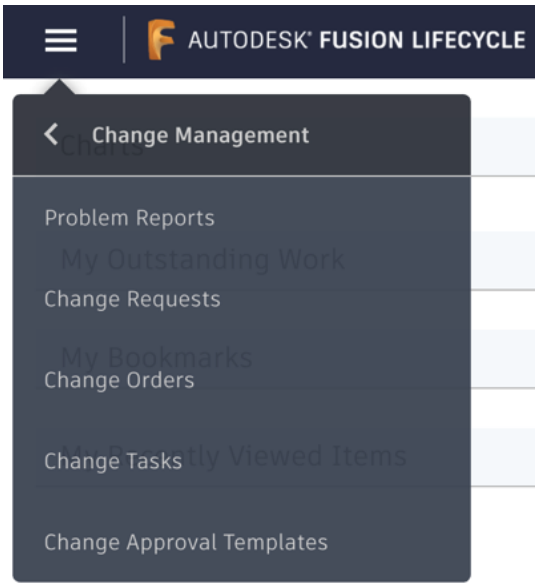
Peter Van Avondt works for Autodesk as a Technical Specialist Data Management PDM/PLM in Northern Europe, based in Belgium. After graduating as a master in electromechanical engineering he joined an Autodesk channel partner as a technical consultant specialized in 3D CAD and product data management PDM. For the last 17 years he has built up a lot of experience in variety of Autodesk design tools as well as with Autodesk Vault and Fusion Lifecycle. In his current role he uses this wealthy knowledge helping Autodesk resellers, prospects, and customers to adopt and implement the Autodesk solutions across different industries including industrial machinery, pharmaceutical, architecture, engineering and construction companies.

Lee Dodds | Technical Sales Specialist – Autodesk Northern Europe

For the last 8-years Lee have been helping customers address their business challenges using Autodesk solutions. In his current role, he focusses on data & process management as well as the entire product lifecycle. In his personal time, he loves an outdoor challenge, whether that be hiking, mountain biking or exploring new places.

Out-of-the-cloud change management solution of Fusion Lifecycle

Change Management within Autodesk Fusion Lifecycle is the smart choice for managing changes within your company with efficiency and speed. It enables to capture the root causes of changes, to evaluate possible changes to address the given problem and it takes care of performing & documenting the given change.

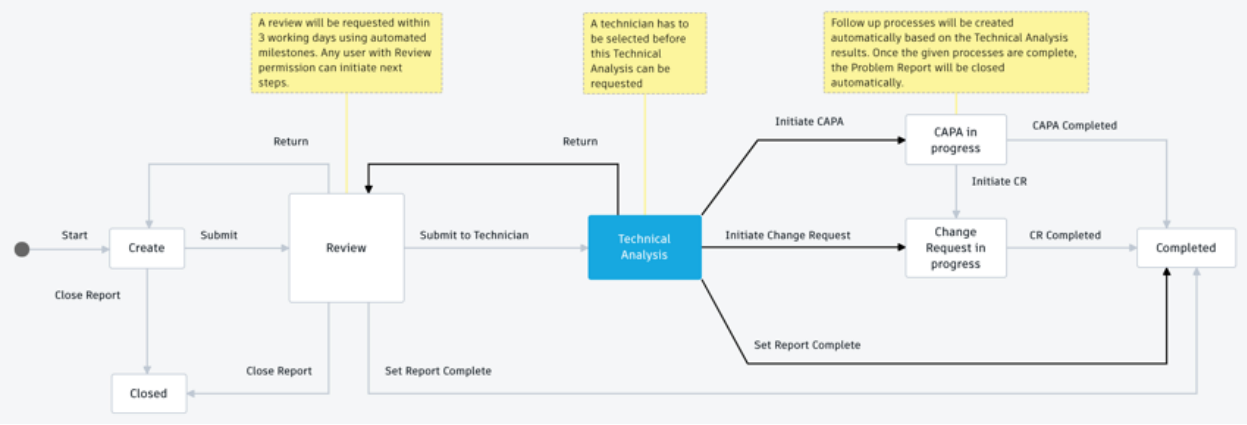


By using the new change management app, all stakeholders get informed about (upcoming) changes ahead of time. They will all gain access to real time information about the progress of changes. The app takes care of electronic approvals of changes and will revise the given product data automatically. Full traceability is granted for all activities to allow for real time KPI analysis and change documentation for audits.

The Change Management app includes multiple workspaces for closed loop Change Management which are all linked together:

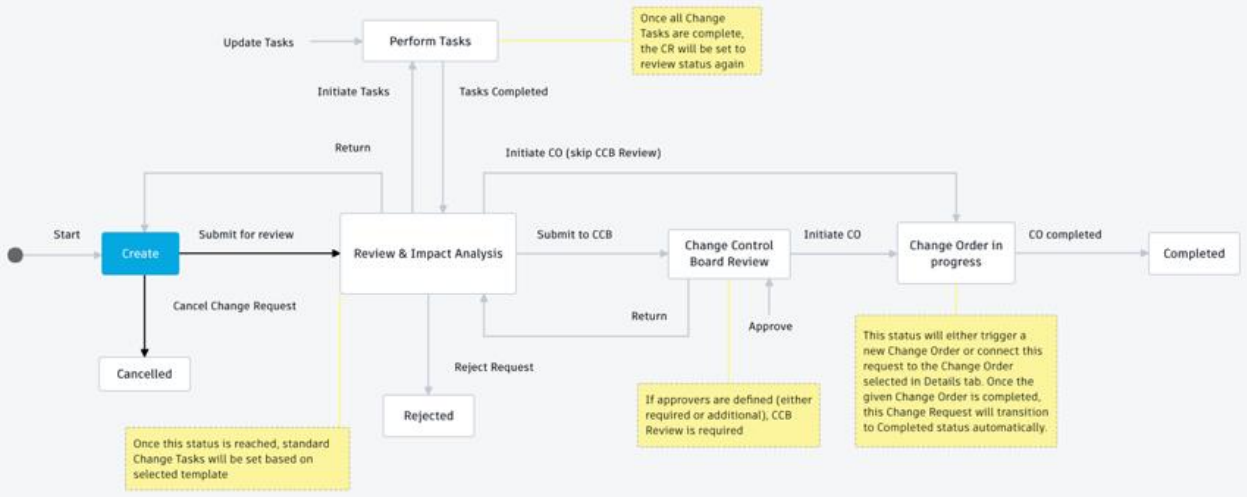
Problem Reports

Problem Reports are used for documenting, analyzing and resolving issues. When a Problem Report is created it can be described, prioritized and categorized. It involves an initial Review and an optional Technical Analysis. It may be used to derive the subsequent Change Request automatically.



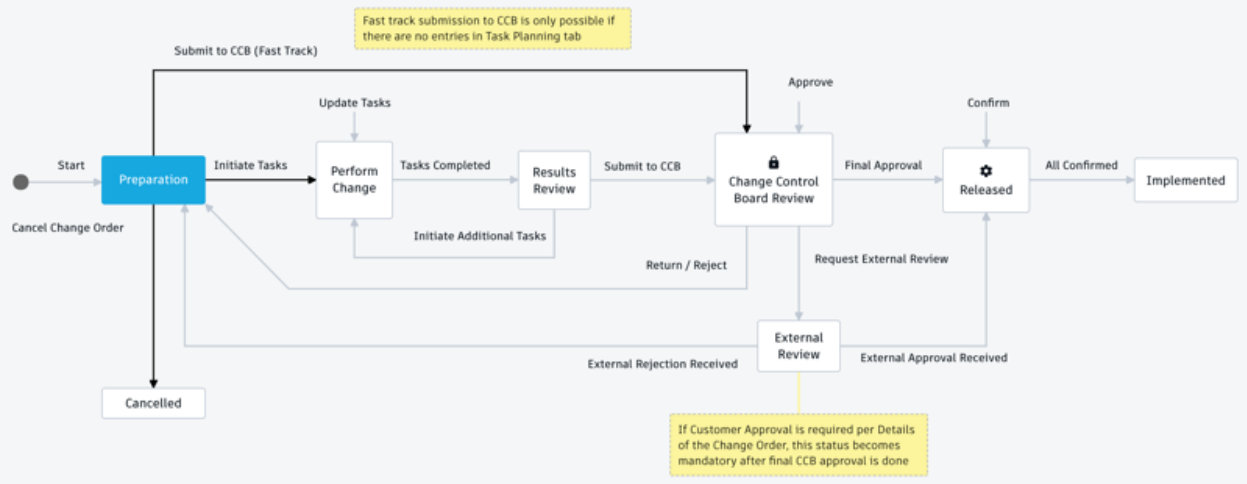
Change Requests

Change Requests are used for proposing a change of an item. It is declarative and states what needs to be accomplished. It may initiate a Change Order to implement the change.



Change Orders

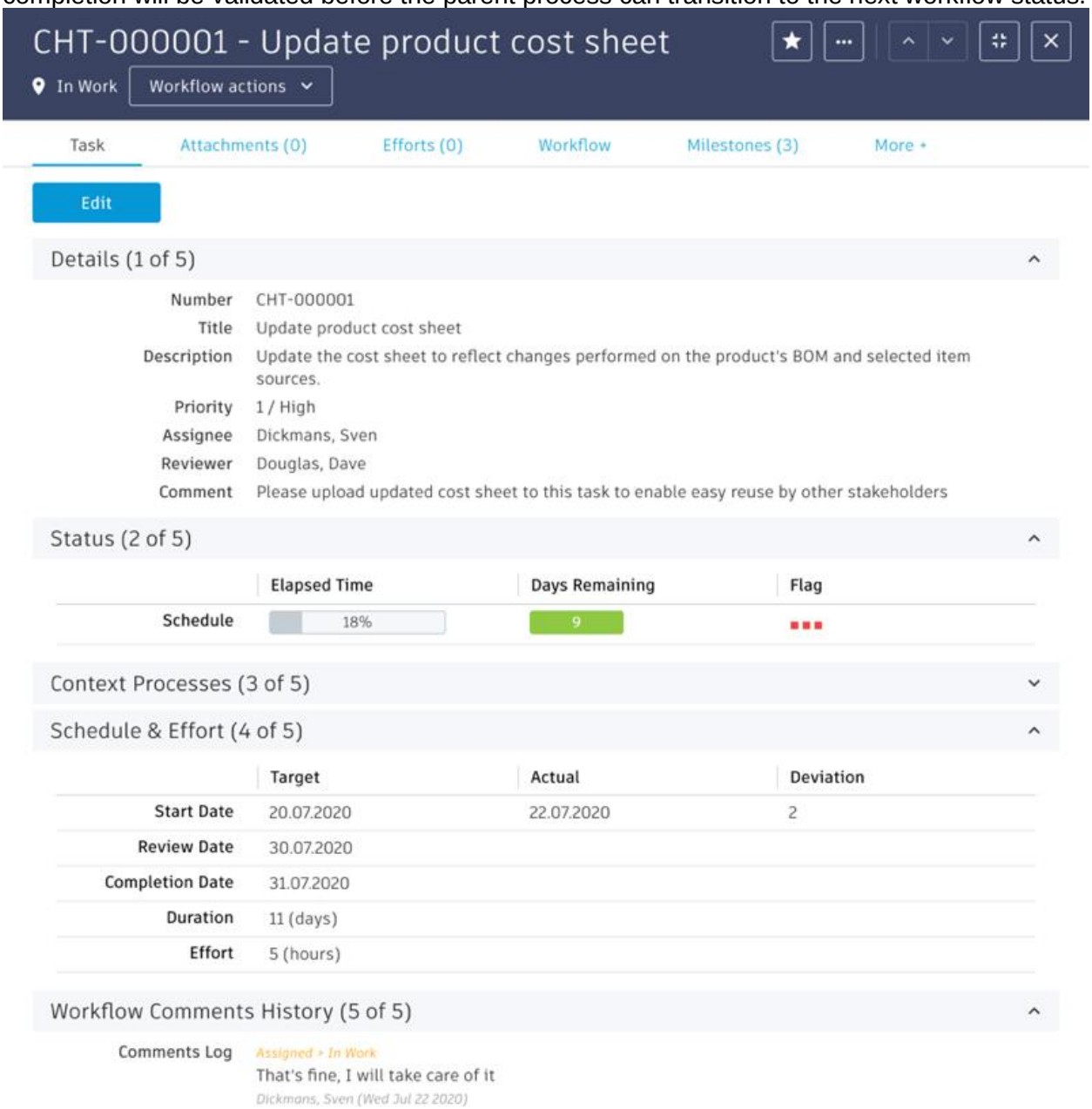
Change Orders may be initiated by preceding Change Requests or created ad hoc. They control revisions of a single item or a number of items. As such, they are used to release new designs, to approve changes performed on a design and also to obsolete items.



Change Tasks

Change Tasks can be used to define activities in context of a Problem Report, Change Request and Change Order. By defining these tasks, one can manage actionable items to implement a change. These tasks can be scheduled and assigned adhoc or be created based on templates.

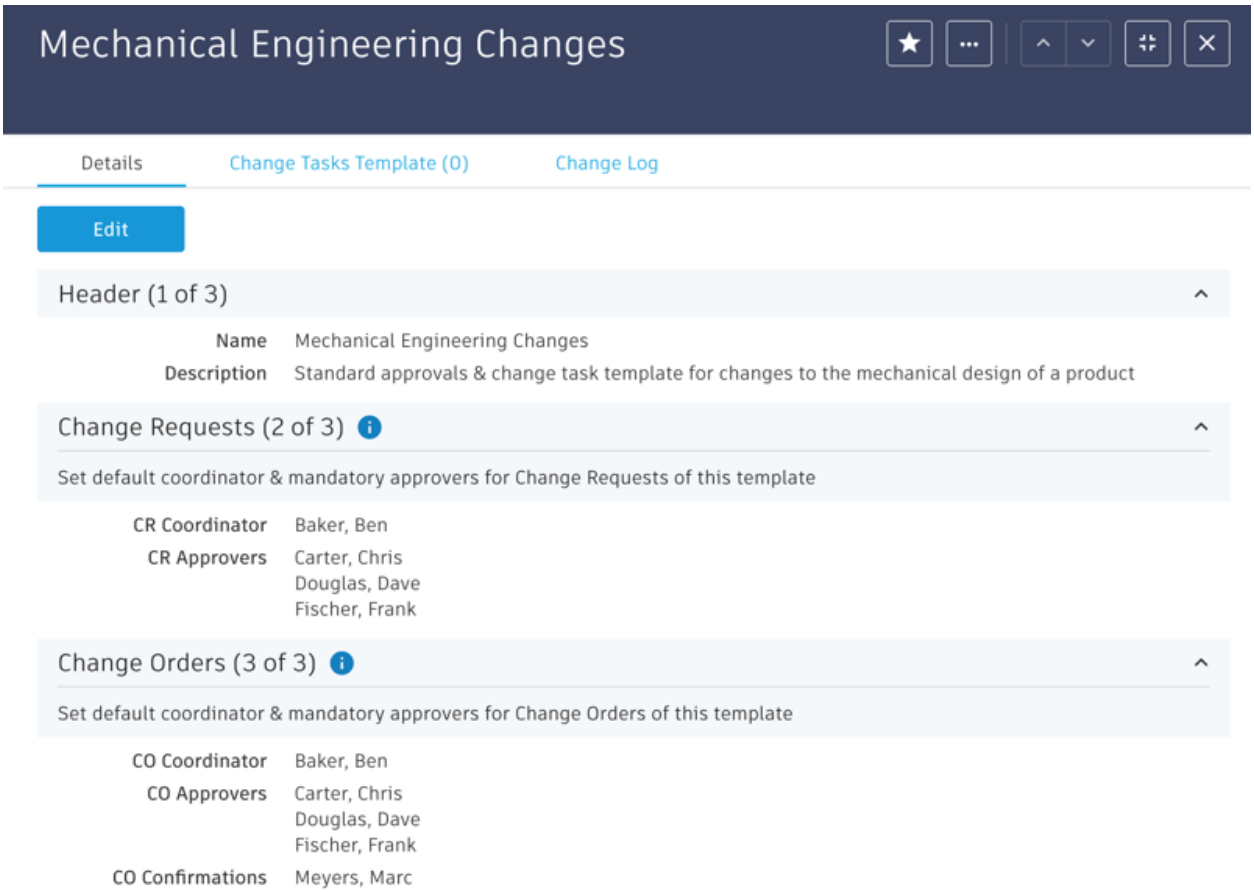
Change Tasks impact the completion of parent processes like Change Orders as their completion will be validated before the parent process can transition to the next workflow status.



Change Approval Templates

Standard approval flows for both Change Requests and Change Orders can be defined by using Change Approval Templates. These templates will determine the responsible coordinators as well as required approvals. In order to achieve this, each Change Request and Change Order has to be linked to such a template. If a Change Order get spawned by a preceding Change Request, the selected Change Approval Template will be copied automatically to enable consistent responsibilities.

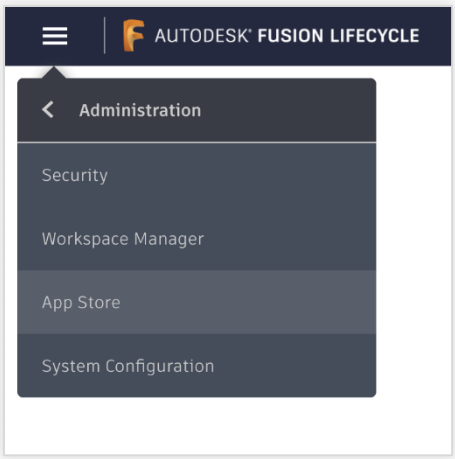
The templates also provide the optional capability to define standard Change Task Templates in order to standardize change execution.



More information

More information about the enhanced capabilities of the new change management app in fusion lifecycle can be found here: http://help.autodesk.com/view/PLM/ENU/?guid=FLC-APPSTORE-CHANGE-MGMT

How to extend your Fusion Lifecycle configuration with apps from the App Store?

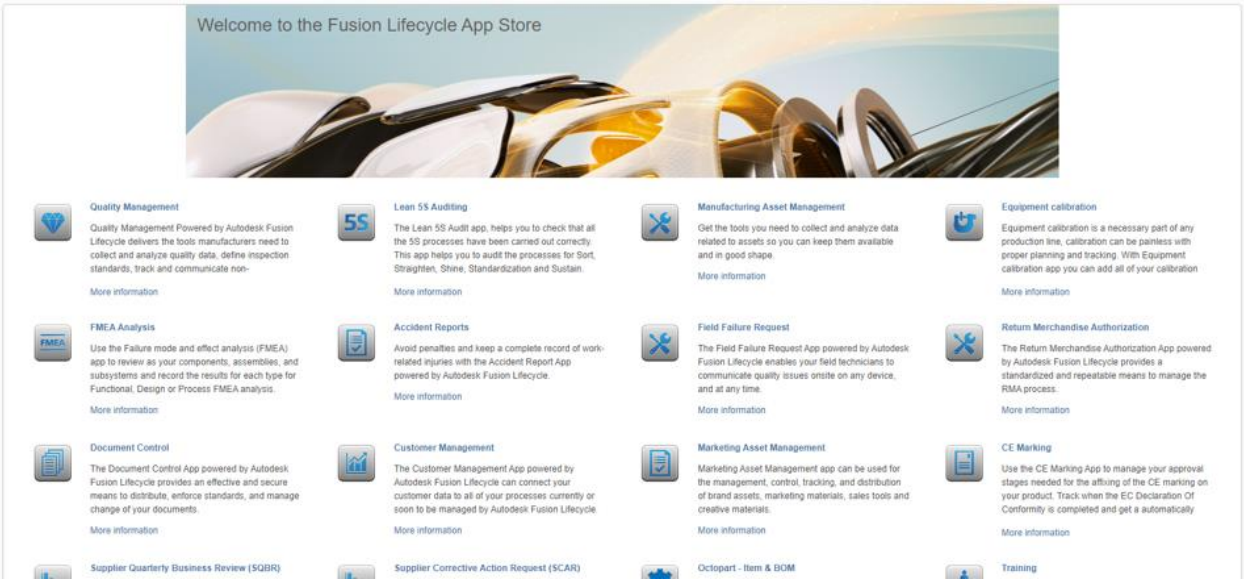


The Fusion Lifecycle App Store is a collection of free, ready-to-implement workspaces that contain business processes and templates. Benefit from industry best-practices with preconfigured fields, tabs, workflows, roles, and permissions. Fusion Lifecycle apps reduce implementation time and enhance ROI during your Fusion Lifecycle deployment. Apps can be tried with User Acceptance Testing before going live, as they contain scripts, reports, picklists, and everything needed. Your Fusion Lifecycle tenant administrator adds the Roles to Groups and anyone within the Group can start using the app.

Access to the Apps Store and installation of Apps

Any administrator with access to a Fusion Lifecycle tenant can view and install apps. An app may involve one or more workspaces, all connected together to achieve a given process or goal. Once installed, an administrator can modify the workspaces within the app to further customize it to the company's needs.

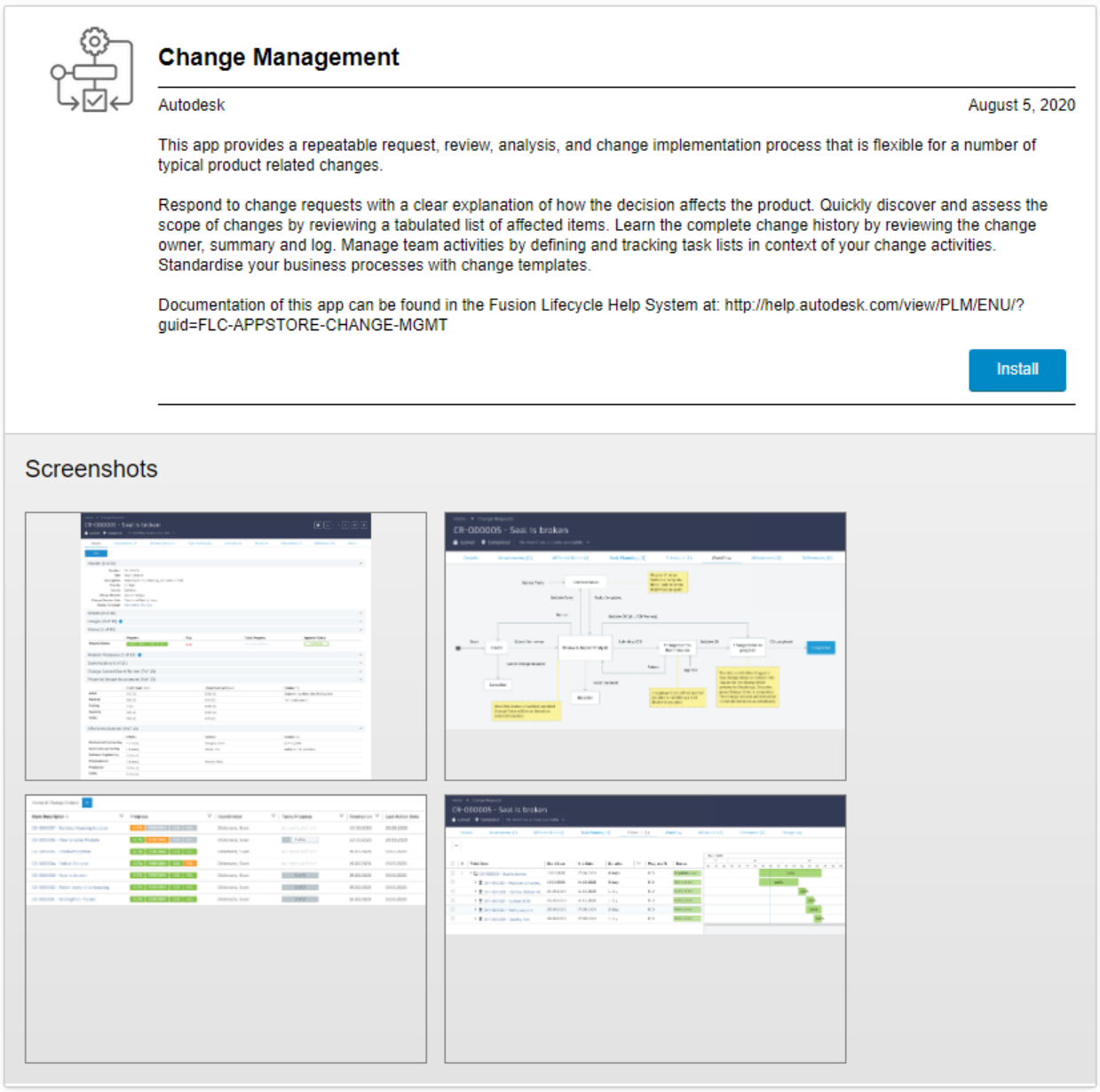
To access the App Store go to "App Store" in the Administration menu.



Within the Fusion Lifecycle App Store you can review the extensive list of ""ready-to-implement" process templates.

To install a specific App click the app name or the More Information link on the App Store page.

On the App Details page, click Install to add the app to your Fusion Lifecycle environment.



Note: Updates to apps in the Fusion Lifecycle App Store do NOT get automatically pushed to your tenant. You may reinstall apps at any time. Reinstalling does not overwrite or update existing apps. Any duplicate app components such as workspaces, fields, and so on will be appended with a _1 suffix and sequenced accordingly.

Installing the new change management app

Important note: This app replaces the former Change Management processes that were delivered with standard tenants in the past. If your tenant does not contain any productive data and you would like to use this app, please uninstall the previous Change Management processes before. However, if Change Management is already live in your tenant, you are advised not to install this app on top as it would not work properly anyhow. Please get in touch with your implementation partner to learn how you can benefit from this app's new features by selectively copying them to your tenant.

Before Installing

Your tenant is already likely to contain the former Change Management solution provided by the standard tenant. As this app will provide updates to existing workspaces such as Change Request, Change Orders and Problem Report and the associated components, you will have to remove certain components before installing the app.

Instructions to remove specific workspaces and make further configuration settings before installing the change management app can be found here:
http://help.autodesk.com/view/PLM/ENU/?guid=FLC-APPSTORE-CHANGE-MGMT-PRE-INSTALL

Installation

Follow the instructions from the previous section to install the Change Management App.
See: Access to the Apps Store and installation of Apps

App Setup & Administration

After installation you will have to perform some configuration changes before you can use the app and link it to your existing processes. Also, further changes are required to make this app work properly.

Changes an configurations that need to be made, include:

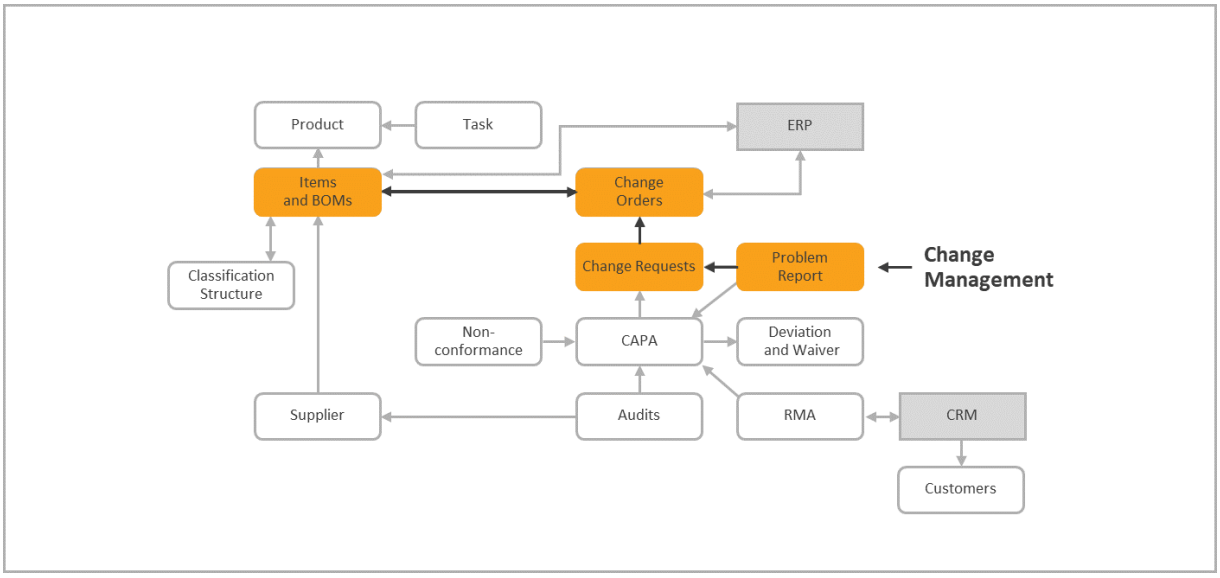
- Granding only access to the hidden sections for the user group "Hidden Sections"
- Set up workspace relationships for the newly created workspaces
- Assign the new Change Order workspace to the relevant transitions in the Lifecycle Editor
- Create new workspace picklists to connect the new change management processes to existing data
- Link the Problem Reports workspace to the CAPA processes
- Assign the new Roles to the given stakeholders within you company

More details about the setup and user administration can be found here:
http://help.autodesk.com/view/PLM/ENU/?guid=FLC-APPSTORE-CHANGE-MGMT-POST-INSTALL
http://help.autodesk.com/view/PLM/ENU/?guid=FLC-APPSTORE-CHANGE-MGMT-ADMIN

Connect Change Management to other stakeholders and processes

Looking at all different moving parts of the product lifecycle, change can happen during any stage of the product development cycle. Change can also be initated from anywhere – inside and outside your organization

Any problem, non-conformance or other quality issue must be captured in order to create awareness. Using online forms in Fusion Lifecycle, this can be done easily at anytime anywhere, even from a tablet. Information about such issues will be shared by the related workflow. The workflow also enables users to decide about how to proceed with the issue – if the given choice is made, the system then automatically initiate the related Change Request which will kick-off the whole change management process.

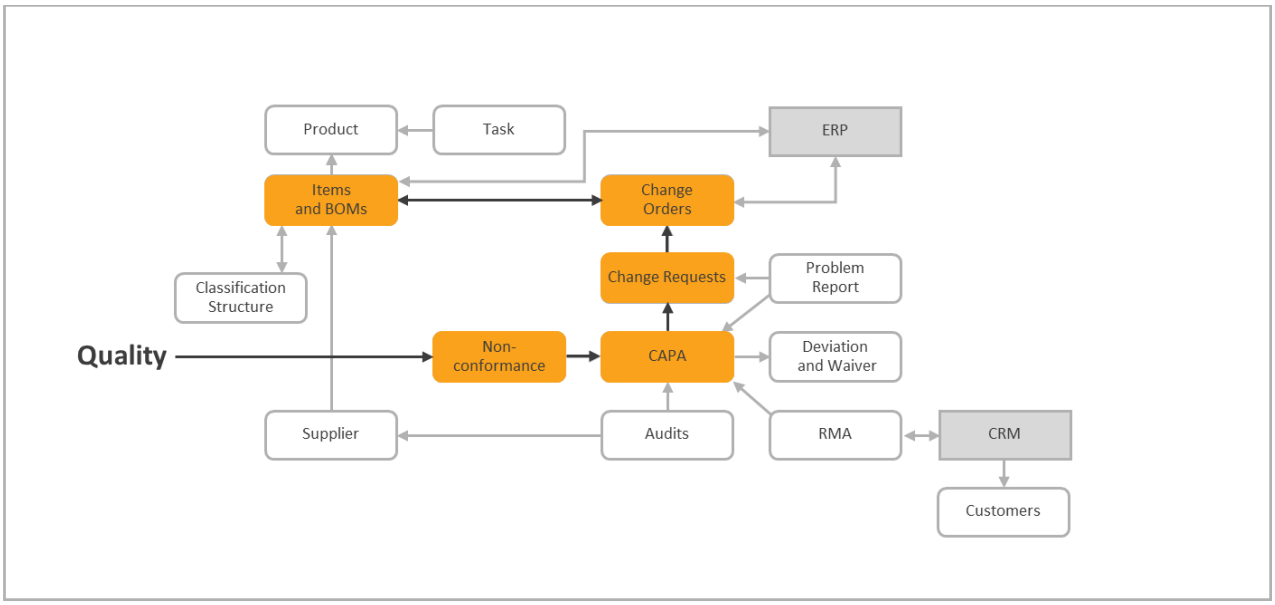


Quality Management

Change and quality management go often hand-in-hand because quality issues are often the reason for change. The idea of Quality Management is capturing the reason and providing a closed loop for all of the quality processes. All it means is you're going to have a way to track it so the right people know about it, they're notified, and have an audit trail.

Often when talking about quality, we want to make sure that we have the ability to track back to the origin the problem, and also see the corrective action or the results of the action.

By having that you're going to have everything inside one system, one location, that digital paper trail and that's all about getting your quality and process under control so you can preven and respond rapidly to quality issues. and ultimately this leads to change management.

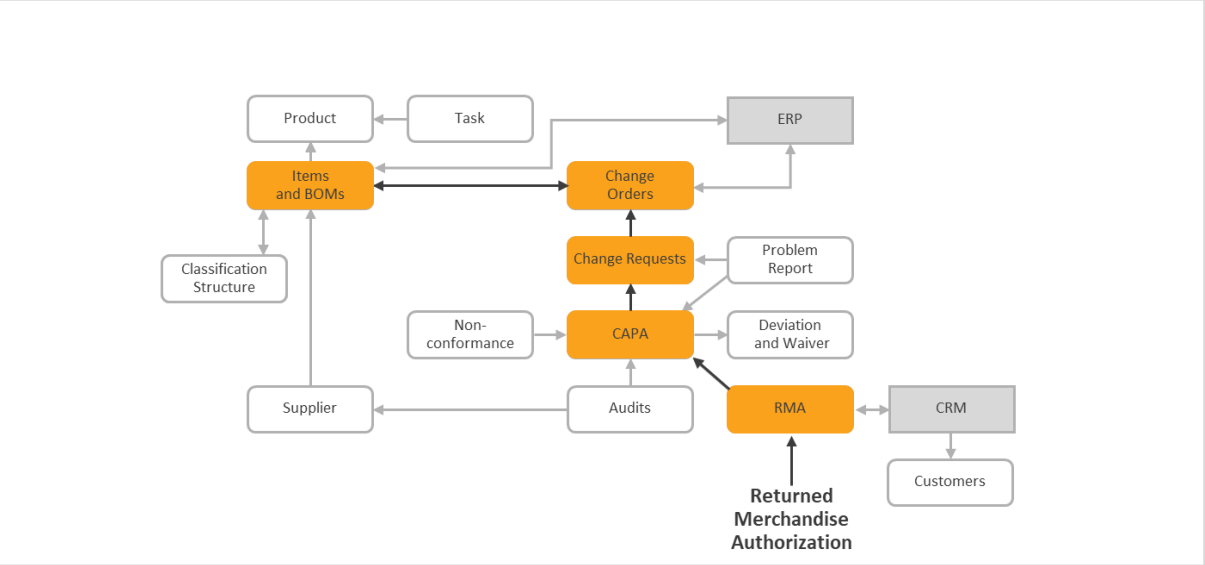


In this case it starts with a issue reported out the field via a non-conformance report. The non-conformacy could lead to a corrective and preventative action (CAPA) – a longer process where you go through and you identify different ways to resolve the issue. The CAPA process will record what you're going to do and you're going to measure it.
As a result of CAPA a change request can be started kicking off the whole change process within your company.

Fusion Lifecycle makes it possible to support this whole process. When you install the new Change Management app, you will see that this ties perfectly in the Quality processes that are already in place.

Return Merchandise Authorization

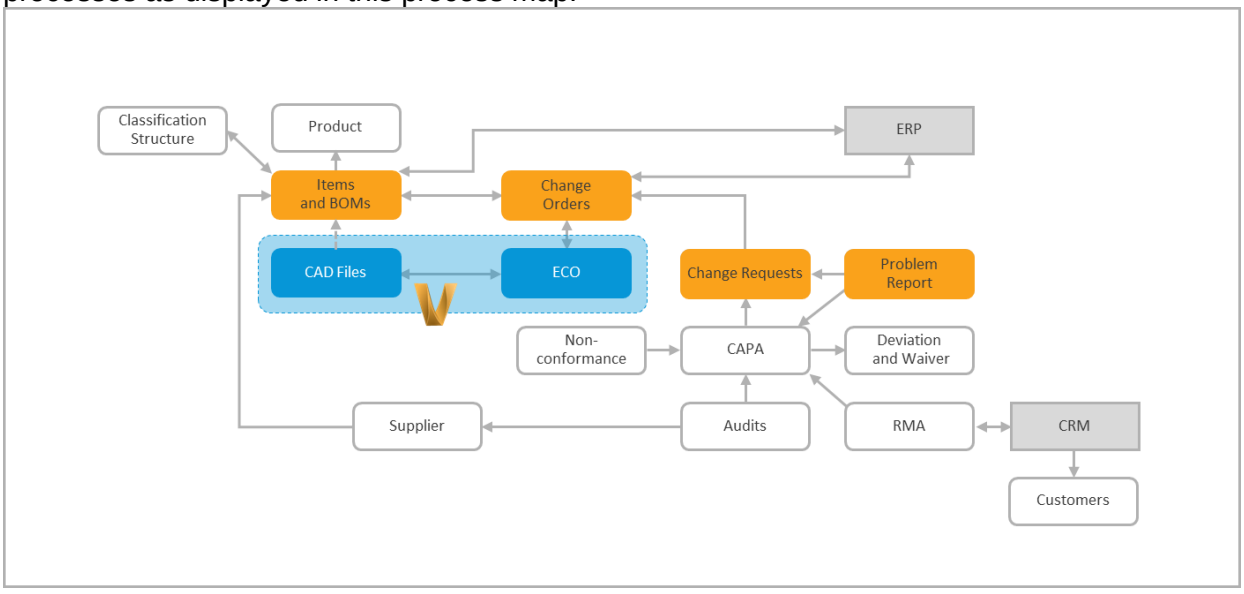
Autodesk Fusion Lifecycle can alse connect your critical RMA processes from to CAPA and Change management helping you prevent and respond rapidly to quality issues.



Driving engineering change in Autodesk Vault

With Fusion Lifecycle you can easily manage the overall change processes in your company. All different stakeholders are united around one single source of truth.
Autodesk Vault on the other hand provides your engineering department with a PDM system that supports your engineers in better organizing their data by storing the data in a single location, so they can align their work without having to worry about overwriting each others work.The biggest asset of a good PDM system is that it can manage the complexity of the engineering data, with a lot of links between the files and that withing a seamless integration to the engineers day to day work environment.

Within Fusion lifecycle we have a lot of processes in place. If we want to integrate Vault with Fusion Lifecycle we have to understand how the engineering process fits in the overall business processes as displayed in this process map:



By integrating the engineering processes – managed in Autodesk Vault – in the overall development and change processes – managed in Fusion Lifecycle – you make sure that the right information is provided at the right stakeholders in an efficient way.

Looking at the change management processes, if a change order applies on mechanical components and engineering is needed to actually drive this changes, an Engineering change order in Vault can be initiated from that change order task. This will make sure that the engineers have all data at hand that needs to be changed. The changes made by the engineers can be finally synced back to Fusion Lifecycle, revising the items and providing the final updates for approval.

For more information on how to integrate Autodesk Vault with Fusion Lifecycle, following classes and recordings are recommended:

AU Vegas 2018:

Streamline Your Development Workflows with Vault and Fusion Lifecycle – Peter Van Avondt

PDM and PLM: Together at Last with Vault and Fusion Lifecycle – Allen Gager / Vahid Zohrehvandi / Michael Vesperman

AU Vegas 2019:

PDM and PLM United: Vault Fusion Lifecycle Connector—a Zero-Code Connector – Christian Gessner / Brian Schanen

AU London 2019:

Bring It All Together: The Fusion Between PDM and PLM – Peter Van Avondt

AU Virtual 2020:

Joint Effort: Vault and Fusion Lifecycle As the New Dream Couple – Christian Gessner