

# Design Configurators: Managing Your Data & Process Workflow

Moderator: Nancy Johnson, Cadalyst

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## IMAGINiT Presenter



**Carl Smith**

Director, Manufacturing Professional Services

# Agenda

- Introduction to IMAGINiT
- Types of Design Configurators
- Data Management
- Process Management

# A Rand Worldwide Company



Leading provider of Autodesk, ARCHIBUS and Leica Geosystems solutions, professional services and training



Leading provider of Dassault software solutions and Dassault and PTC training



High-quality professional training materials for Autodesk, PTC and Dassault software



# Forty Offices Across North America



# Services, Training and Support Offerings

## Professional Services

- Consulting
- Data Management
- Implementation
- Process Automation and Software Development
- BIM Management Outsourcing
- Rendering and Visualization
- Reality Capture
- Facilities Management

## Self-Paced eLearning and Online Training

- In-Person Classes
- Live Online Training
- Private and Dedicated Training
- ProductivityNOW Support
- ProductivityNOW Learning



# Industry Leading Partner

## Autodesk Relationship



The leading provider of Autodesk software products



Largest Autodesk Authorized Training Center partner in North America



Authorized Autodesk Author, Publisher, and Developer of Autodesk courseware. (Ascent)

## Proven Performance



Proven implementation methodologies



Innovative and flexible support systems

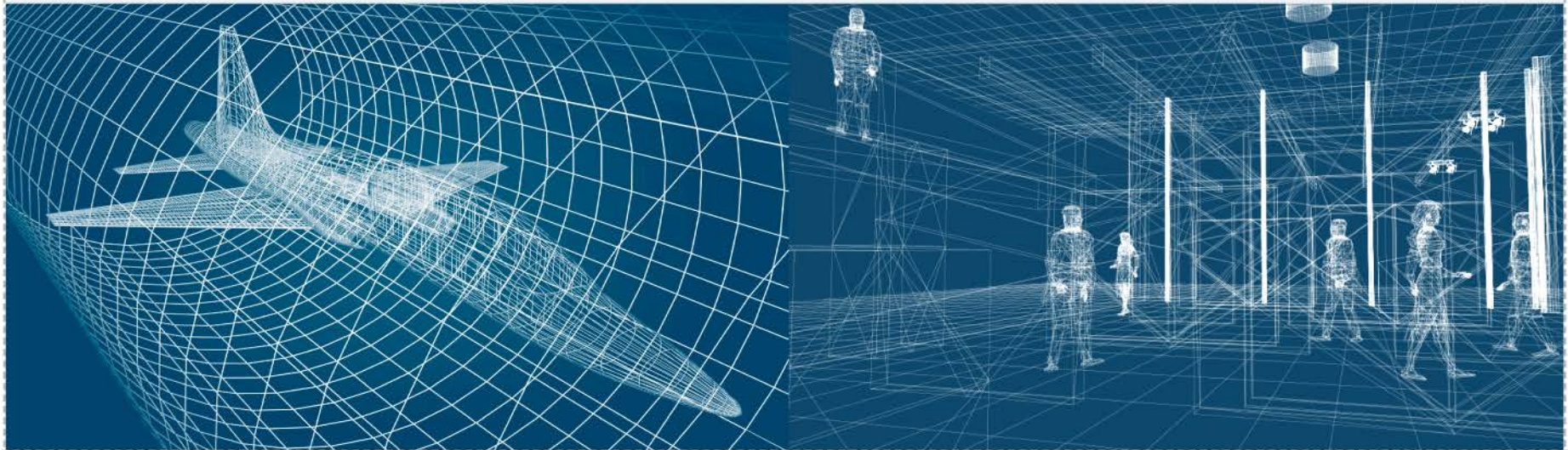


Award-winning  
Top-rated in customer satisfaction



## Design Configurators

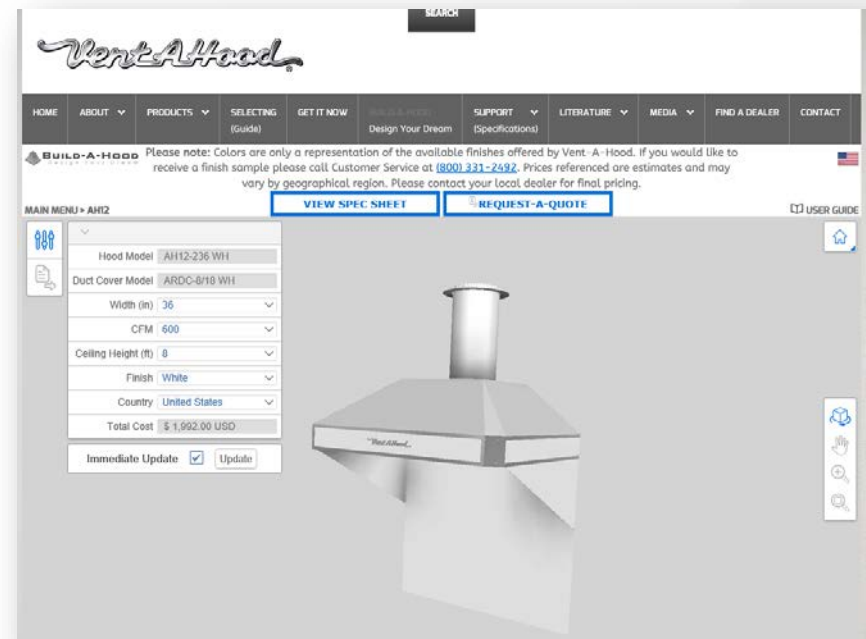
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# Design Configurators

- **Configurators**, also known as choice boards, design systems, toolkits, or co-design platforms, are responsible for guiding the user through the configuration process.
- Different variations are represented, visualized, assessed and priced which starts a learning-by-doing process for the user.





# Design Configurators

The success of such an interaction system is by no means solely defined by its technological capabilities, but also by **its integration in the whole sales environment**, its ability to allow for learning by doing, to provide experience and process satisfaction, and its integration into the brand concept.

# Design Configurators

- Advantages –

- ▶ Configurators can be found in various forms and different industries They are employed in B2B as well as B2C markets and are operated either by trained staff or customers themselves.
- ▶ B2B configurators are primarily used to support sales and lift production efficiency, B2C configurators are often employed as design tools that allow customers to "co-design" their own products. This is reflected in different advantages according to usage:

# Design Configurators

- Advantages For B2B:
  - ▶ Lower distribution costs
  - ▶ Quicker reaction to customer inquiries
  - ▶ Reduced capital commitment and less overproduction
  - ▶ Error elimination throughout the ordering and production process
  - ▶ Quality improvements in customer-service
  - ▶ Worldwide access to up-to-date product information



# Design Configurators

- Advantages For B2C:
  - ▶ Differentiation through individuality
  - ▶ Reduced capital commitment and less overproduction
  - ▶ Better knowledge of customers' needs
  - ▶ Higher customer loyalty
  - ▶ Shopping as experience

# Design Configurators

- **Enabler of mass customization**
  - ▶ Configurators enable mass customization, which depends on a deep and efficient integration of customers into value creation.
  - ▶ Configurators serve as an important tool for choice navigation. Configurators have been widely used in e-Commerce.

# Design Configurators

## Autodesk Configuration Tools

- Autodesk ETO
- Autodesk Inventor iLogic
- Autodesk Configurator 360



# Design Configurators

## Autodesk Configuration Tools

Size

Overall

Length 700 mm

Height 700 mm

Width 900 mm

Stile Spacing 500 mm

Right Rail ☒

Left Rail ☒

Steps

Step Height 150 mm

Step Width 130

Riser

Style WUC

UPE Size UPE180

WUC Sie WUC170/5

Flatbar Height 200 mm

Flatbar Thickness 20 mm

Info

Spaces 4 ul

Step Height 175 mm

StairsK 1 ul

Angel 49.345 deg

Done



# Design Configurators

## Autodesk Configuration Tools

Size

☐ Overall

Length 850 mm

Height 850 mm

Width 900 mm

Stile Spacing 400 mm

Right Rail ☐

Left Rail ☒

☐ Steps

Step Height 120 mm

Step Width 130

☐ Riser

Style UPE

UPE Size UPE180

WUC Sie WUC170/5

Flatbar Height 200 mm

Flatbar Thickness 20 mm

☐ Info

Spaces 7 ul

Step Height 121.429 mm

StairsK 1 ul

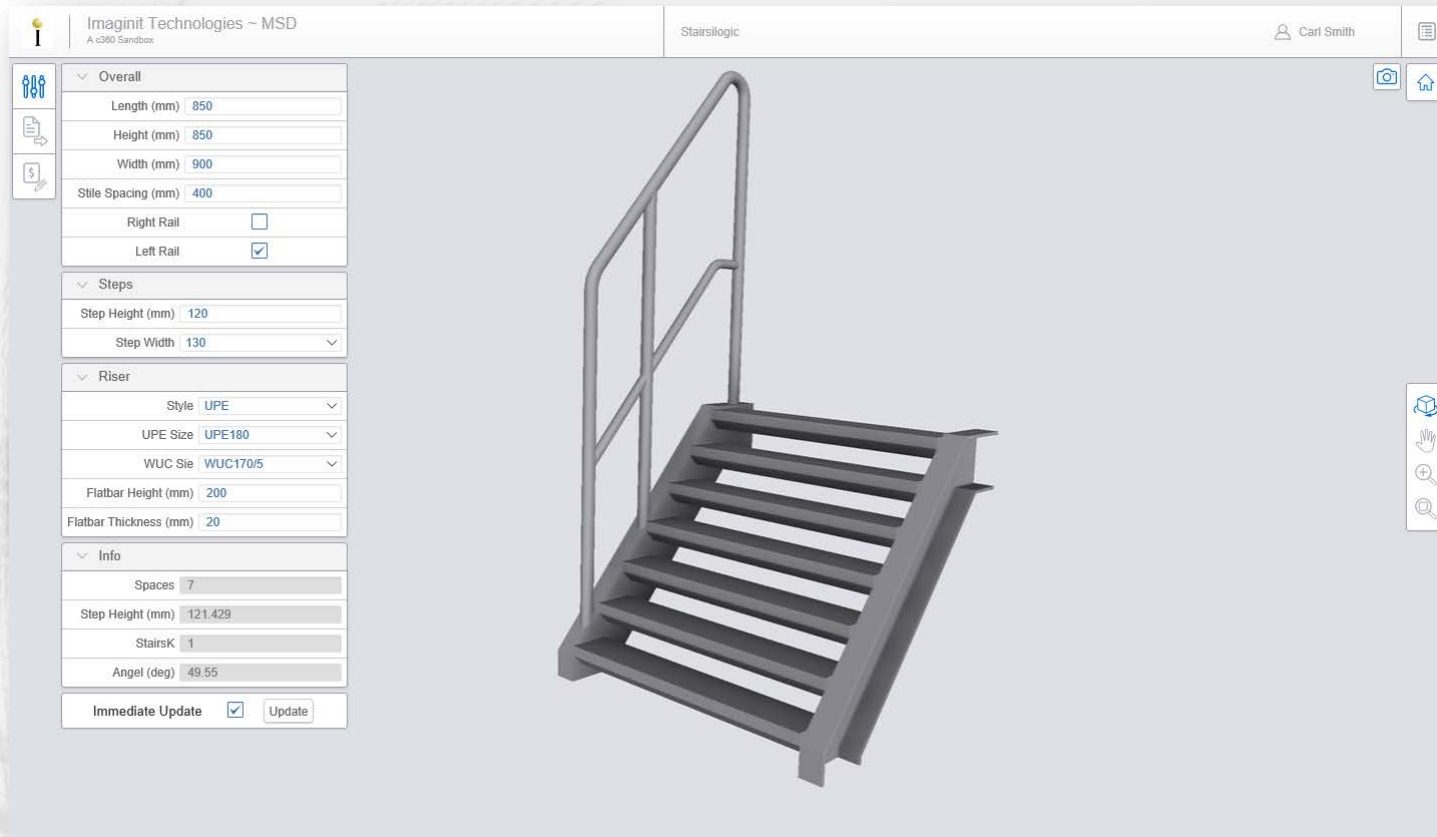
Angel 49.549 deg

Done



# Design Configurators

## Autodesk Configuration Tools



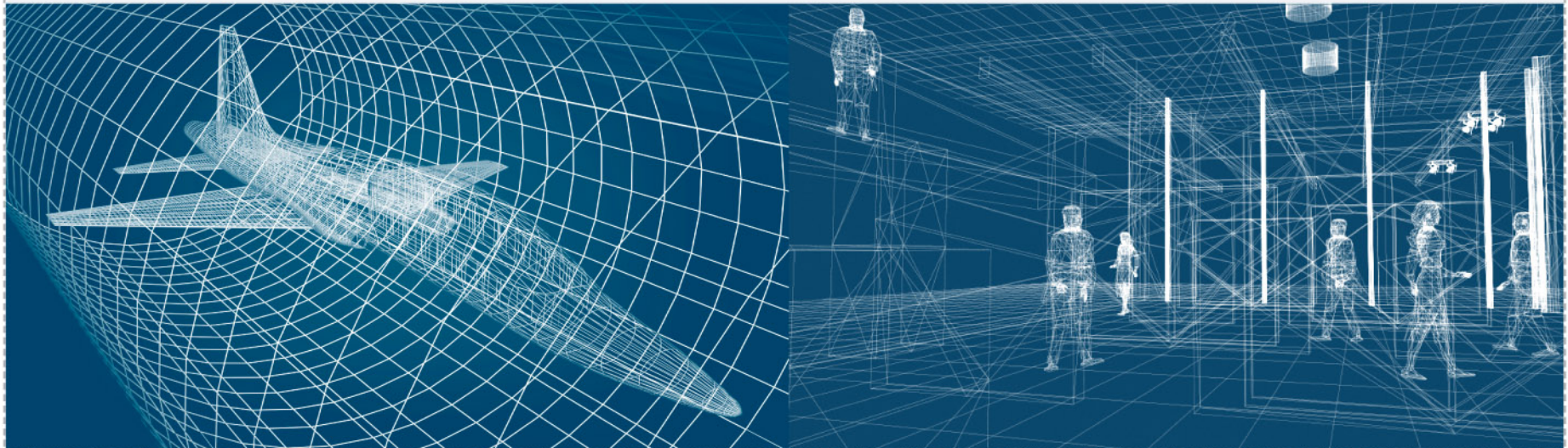




# Design Configurators

Data Management

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# Design Configurators

*The success of such an interaction system is by no means solely defined by its technological capabilities, but also by **its integration in the whole sales environment**, its ability to allow for learning by doing, to provide experience and process satisfaction, and its integration into the brand concept.*



# Design Configurators – Data Management

## PDM

- "Data Resource Management is the development and execution of architectures, policies, practices and procedures that properly manage the full data lifecycle needs of an enterprise."



# Design Configurators – Data Management

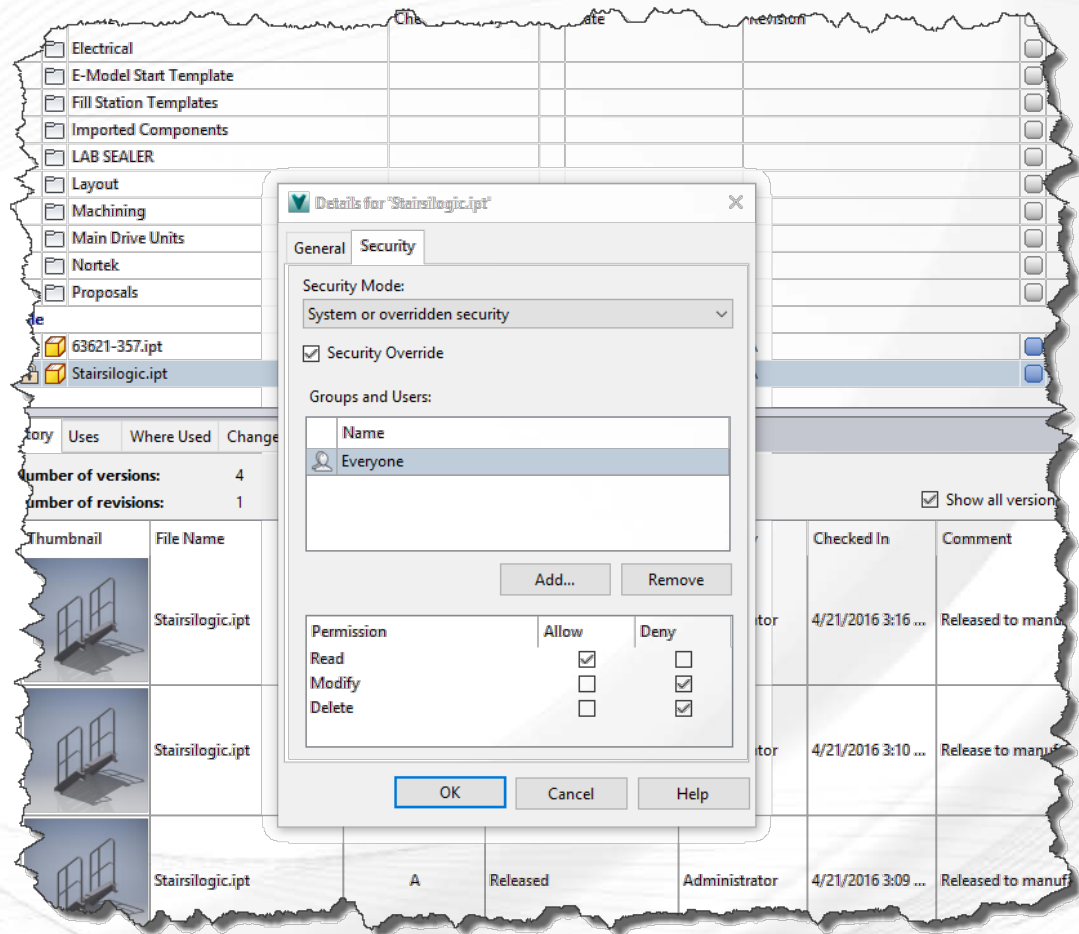
- In modern usage, one can easily discern a trend away from the term 'data' in to the term *information* or even *knowledge* when talking in non-technical context.
- Thus there exists not only data management, but also information management and knowledge management.
- While data can exist as such, 'information' and 'knowledge' are in the "eye" (or rather the brain) of the beholder and can only be measured in relative units.

# Design Configurators – Data Management

- Information Management
  - ▶ Who made modifications?
  - ▶ Metadata enforcement
  - ▶ Security
- Knowledge management.
  - ▶ Change Management and workflow
  - ▶ ERP integration
  - ▶ Configuration Rules!

# Design Configurators – Data Management

- Enhanced data security
  - Keep designs more secure at the folder or file level. Specify who can change the lifecycle state or access a file in a particular lifecycle.

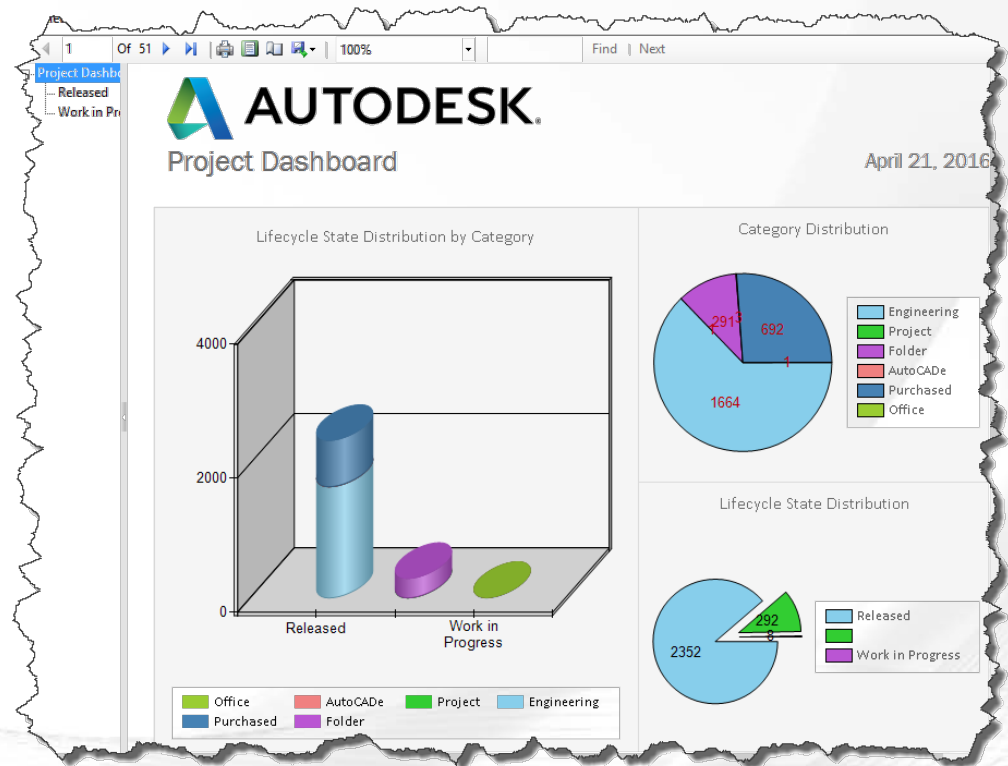




# Design Configurators – Data Management

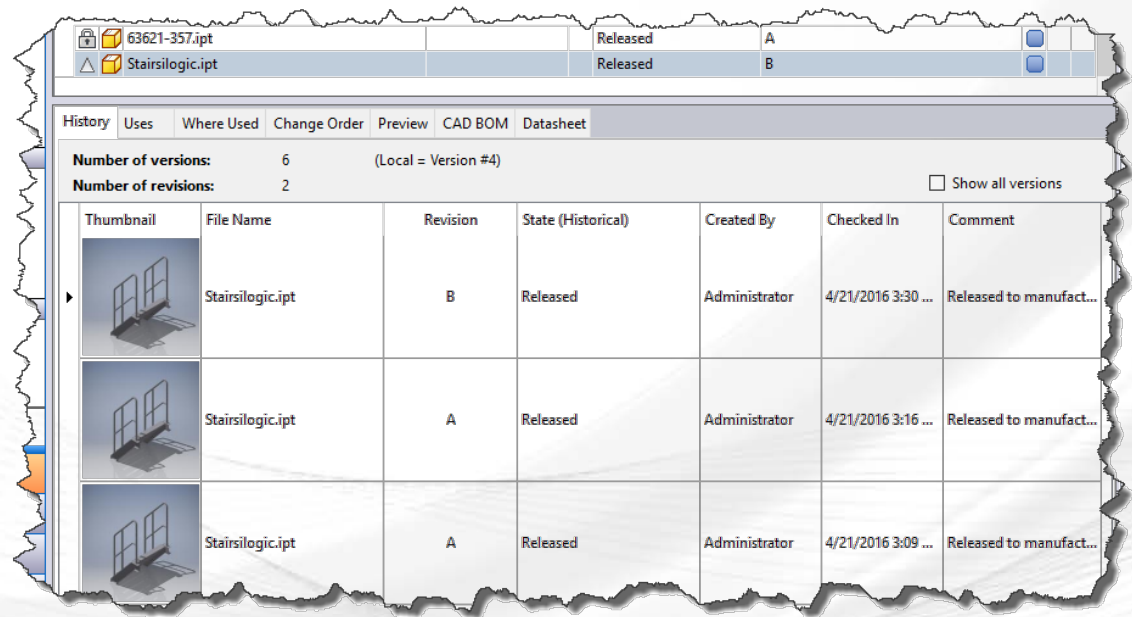
## ■ Projects and reporting

- ▶ Collaborate on a project basis for better workgroup communication. An intuitive reporting dashboard offers clear visual feedback on project status. Team members can share content across projects without copying or moving files between folders.



# Design Configurators – Data Management

- Revision control
  - ▶ With Vault, revision tracking is automatic. Stay focused on designing. Vault PDM software can automatically capture the CAD revision history directly on the drawing as you work. Help reduce the chance of version control errors by securely releasing and tracking files.



# Design Configurators – Data Management

- **Multisite scalability**

- ▶ Connect workgroups located across the globe with a scalable and more cost-effective product data management solution.

- **ERP integration**

- ▶ Bridge the gap between CAD design development tracking tools and enterprise resource planning (ERP) management tools. Minimize manual re-entry of design and bill of materials (BOM) data.

- **Define and customize standards**

- ▶ Customize your product data management (PDM) solution to fit your company's needs, and promote your standardization goals with automatic file naming and categorization.

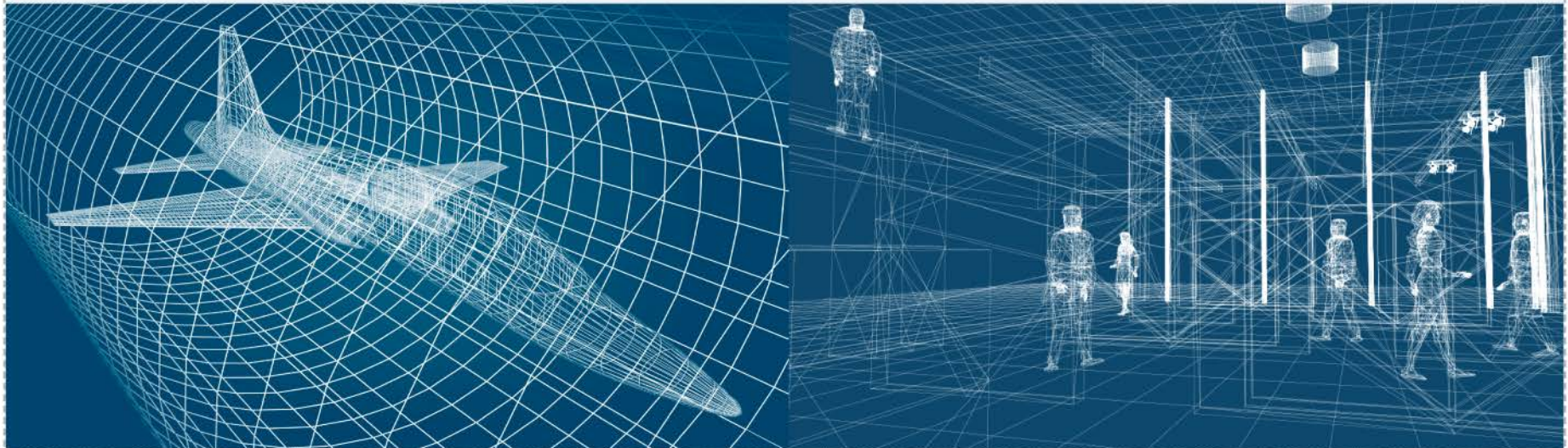




# Design Configurators

## Process Management

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# Design Configurators - Process Management

- The goal behind most design configurators is to eliminate delays and errors and increase throughput on RFQs and submittal drawings.
- Be diligent to avoid fixing one issue only to create other!

Request Quote X

Submit this configuration for a quote, and someone will get back to you..

Name

Email

Company

Address

City

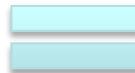
State

Country

ZIP Code

Comments

We partner with Autodesk to help bring you this service. All personal information submitted will be handled according to the privacy policies of Imaginit Technologies ~ MSD and [Autodesk](#).





# Design Configurators - Process Management

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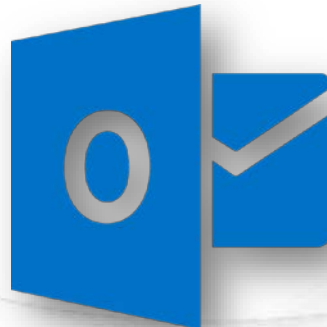
# Design Configurators - Process Management

- Process lifecycle management can be considered one of the four cornerstones of a manufacturing corporation's information technology structure.
- All companies need to manage communications and information with their customers (CRM-customer relationship management), their suppliers and fulfillment (SCM-supply chain), their resources within the enterprise (ERP-enterprise resource planning) and their *product planning and development (PLM)*.



# Design Configurators - Process Management

- In industry, **PLM** is the process of managing the entire lifecycle of a product from inception, through engineering design and manufacture, to service and disposal of manufactured products.
- PLM integrates people, data, processes and business systems and provides a product information backbone for companies and their extended enterprise.



# Design Configurators - Process Management

- **PLM** has a proven ROI
  - ▶ Reduced time to market
  - ▶ Improved product quality and reliability
  - ▶ Ability to quickly identify potential sales opportunities
  - ▶ Seasonal fluctuation management
  - ▶ Improved forecasting to reduce material costs
  - ▶ Maximize supply chain collaboration
  - ▶ ***Savings through the complete integration of engineering workflows***
  - ▶ ***More accurate and timely request for quote generation***
- The barrier to most has been the “I”



# Design Configurators - Process Management

- Cloud based PLM systems such as Autodesk PLM 360 alleviate the investment in technology infrastructure.
- “Up and running” much faster than traditional software
- Scalable and configurable to your business workflow



# Design Configurators - Process Management

Get a dashboard that represents your business process

The screenshot displays the Autodesk PLM 360 user interface. At the top, the header includes the Autodesk PLM 360 logo, user information for Carl Smith, and navigation links for Dashboard and Help. Below the header is a search bar labeled 'Search PLM 360' with a 'Search' button. The main content area is divided into several sections:

- My Dashboard**: A section with a question mark icon.
- My Outstanding Work**: A table listing outstanding work items with columns for Due Date, Item, State, State Set On, and State Set By.
- My Dashboard Links**: A table with columns for Item, Workspace, and Note, currently showing 'No results'.
- My Recently Viewed Items**: A table listing recently viewed items with columns for Item and Workspace.

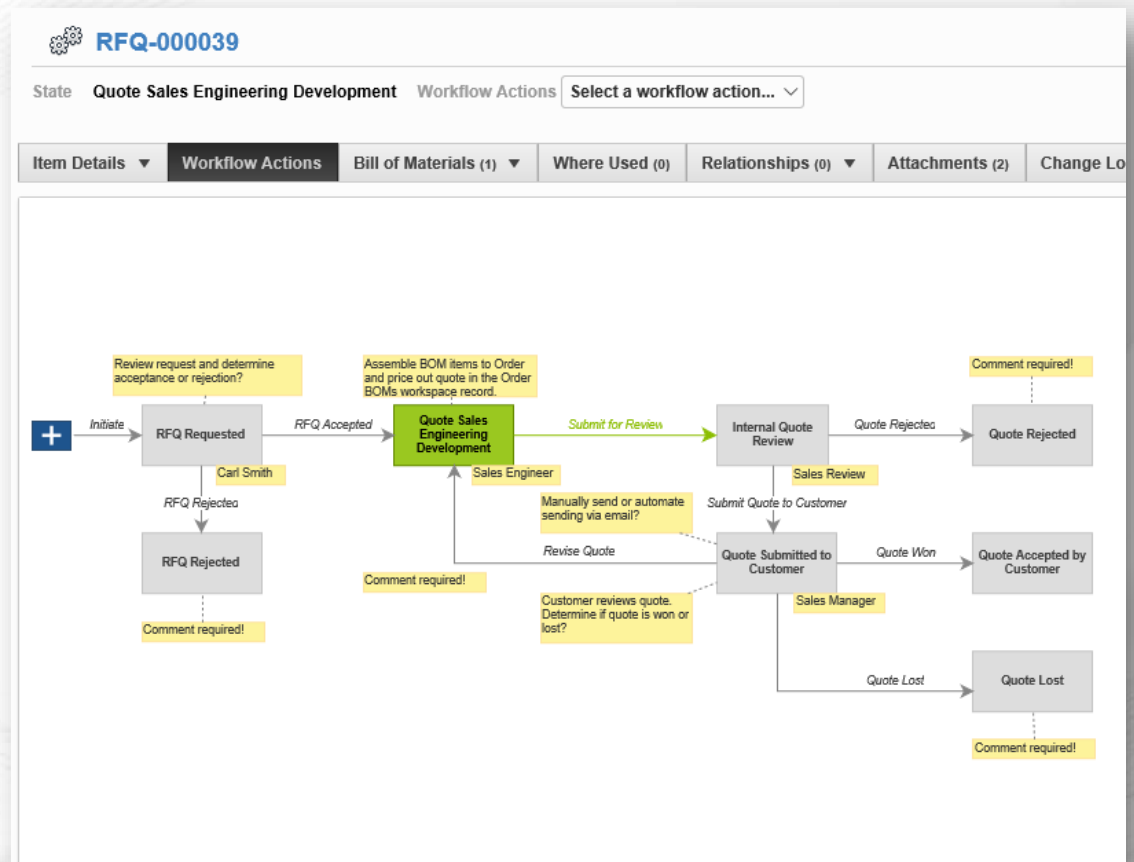
Due Date	Item	State	State Set On	State Set By
	RFQ-000042	RFQ Requested	04/21/2016	<a href="#">Configurator360 Service User</a>
	RFQ-000041	RFQ Requested	04/21/2016	<a href="#">Configurator360 Service User</a>
	RFQ-000040	RFQ Requested	02/24/2016	<a href="#">Configurator360 Service User</a>
	RFQ-000039	Quote Sales Engi...	01/27/2016	<a href="#">Carl Smith</a>
	RFQ-000004	RFQ Requested	06/24/2015	<a href="#">Configurator360 Service User</a>

Item	Workspace	Note
No results		

Item	Workspace
RFQ-000040	<a href="#">Configurator 360 RFQ</a>
RFQ-000039	<a href="#">Configurator 360 RFQ</a>
RFQ-000004	<a href="#">Configurator 360 RFQ</a>
RFQ-000001	<a href="#">Configurator 360 RFQ</a>
RFQ-000002	<a href="#">Configurator 360 RFQ</a>

# Design Configurators - Process Management

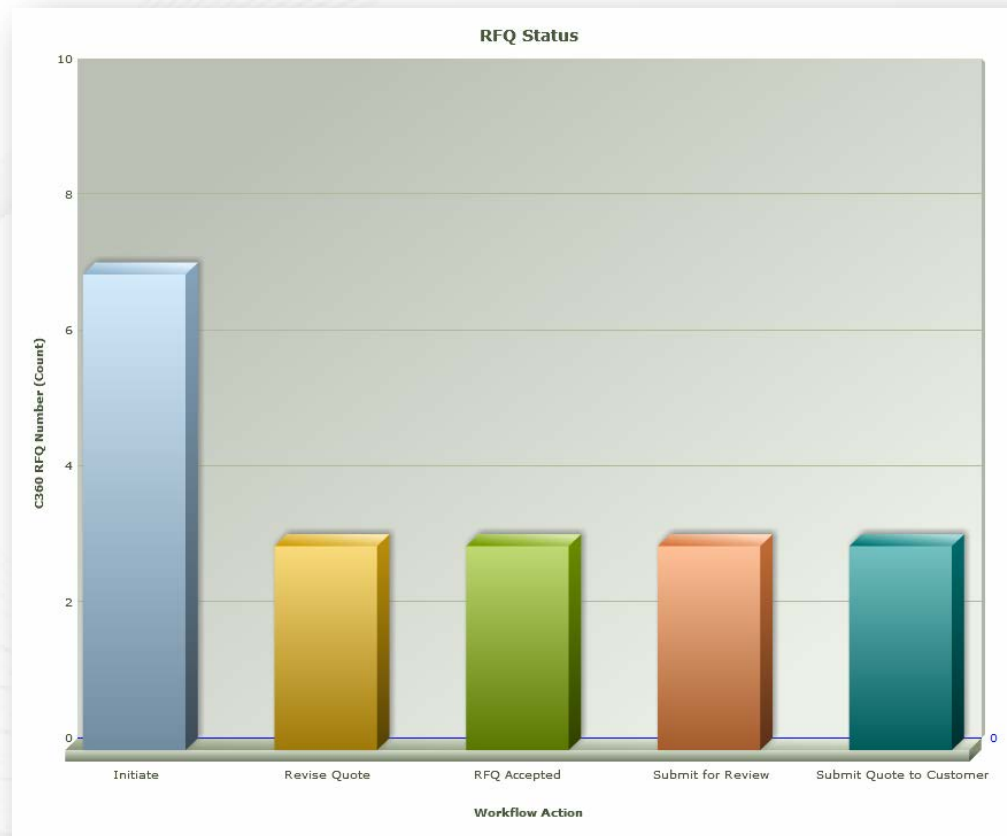
A workflow that facilitates good communication and understanding of the process lifecycle:





# Design Configurators - Process Management

Reports that let you make more informed decisions in real-time:



# Design Configurators

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The background of the slide is a dark blue wireframe mesh. Within this mesh, there are white wireframe outlines of several human figures in various poses, suggesting movement or a virtual environment. In the upper right corner, there is a small, detailed wireframe model of a quadcopter drone.

**Thank you!**



# Q&A

Submit your question using the Questions panel  
on the right side of the GoToWebinar interface.

*Questions not addressed during the presentation will be answered directly by  
IMAGINiT after the event.*

# Thank You for Attending “Design Configurators: Managing Your Data & Process Workflow”

More information will be available soon at  
[www.cadalyst.com/design-configurators](http://www.cadalyst.com/design-configurators)