LORD Corporation

BUSINESS-DRIVEN DOCUMENT MANAGEMENT WITH ARAS INNOVATOR

Nate Ouellette

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LORD Corporation

Founded in 1924, LORD Corporation is a diversified technology and manufacturing company commercializing highly reliable adhesives; coatings; vibration control and motion management devices and systems; and sensing technologies.

" Hugh Lord did not invent the LORD Mount to sell a product, but to solve a problem."

— **Donald M. Alstadt**
LORD Chairman Emeritus
1967-2007

Creating Valued Solutions

Working across diverse sciences and technologies to solve customer needs

Major Markets Served

Aerospace & Defense

Automotive

Electronics

Energy

Industrial

Marine

Oil & Gas

Solution Platforms

Elastomer Adhesives & Coatings

Structural Adhesives

Protective Coatings

Electronics

Motion and Vibration Control Assemblies

Electro-Mechanical Motion and Vibration Control Systems

Sensing Systems

Core Sciences & Technologies

Surface Science

Polymer Science

Material Science

Mechanical Design

Dynamic Systems

Control Systems

Wireless Sensing

Energy Harvesting

Inertial/Orientation Technologies

Displacement Sensing

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Serving the World's Leading Companies

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Nate Ouellette

Technical Project Manager, Global Technology & Quality

- Mechanical Engineer by Education

- PLM Consultant for 5+ years

- Joined LORD Corporation March 2016

- Using Innovator for Document Management in Production today
  - Next phases include expanded Document Management Functionality including Export Controls and CAPA (Corrective Action Preventive Action)
  - Innovator 11.0 SP8 with Office Connector 11.0R3

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LORD Document Management Overview

QUALITY AND TECHNICAL DOCUMENT MANAGEMENT

- Configured Workflows
  - Change Management
  - Automatic Review Periods

- Business Logic Driven by Aras Innovator

- Integration with Microsoft Office Suite
  - Document Updates
  - PDF Viewable Generation
  - Automatic Blackline/Differential Creation

- Workflow Voting from Email Notifications

- Workflow & Task Assignment Reporting

- Custom Dashboards

- Export Classification Security

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Business Rules

INTELLIGENT PROCESSES THAT ALIGN WITH CUSTOMER GOALS

Blackline Creation & Validation

- Utilize Office Connector with Microsoft Word to capture document changes version to version and store as a PDF in Innovator
- No need to track changes in the documents themselves
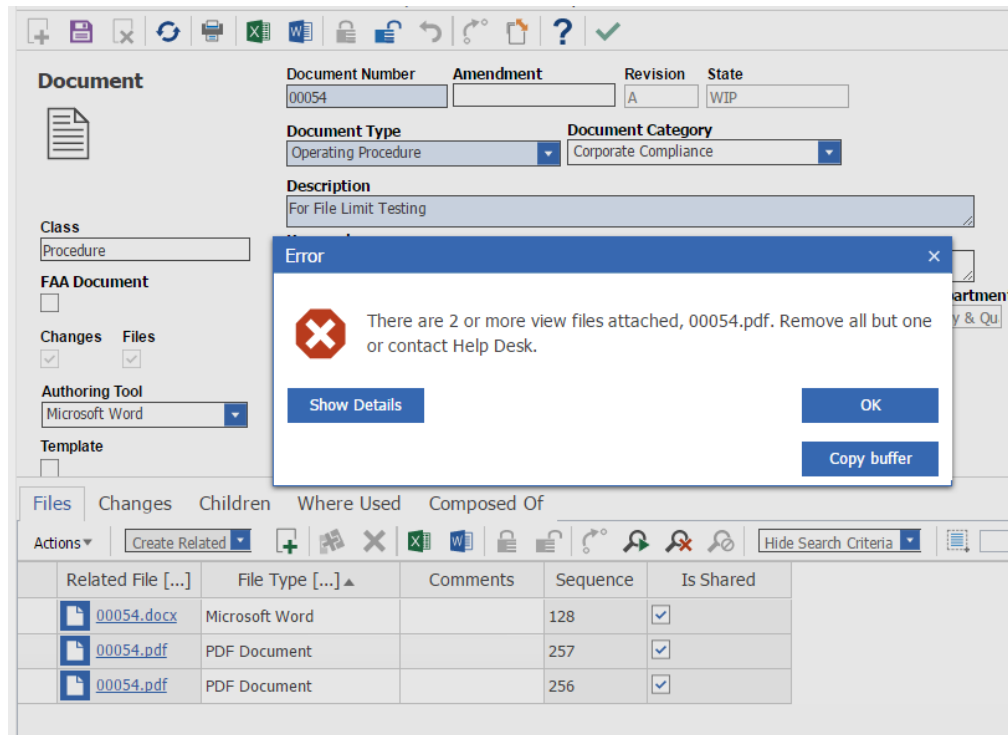- Workflow is configured to confirm latest blackline that has been generated includes the most recent changes
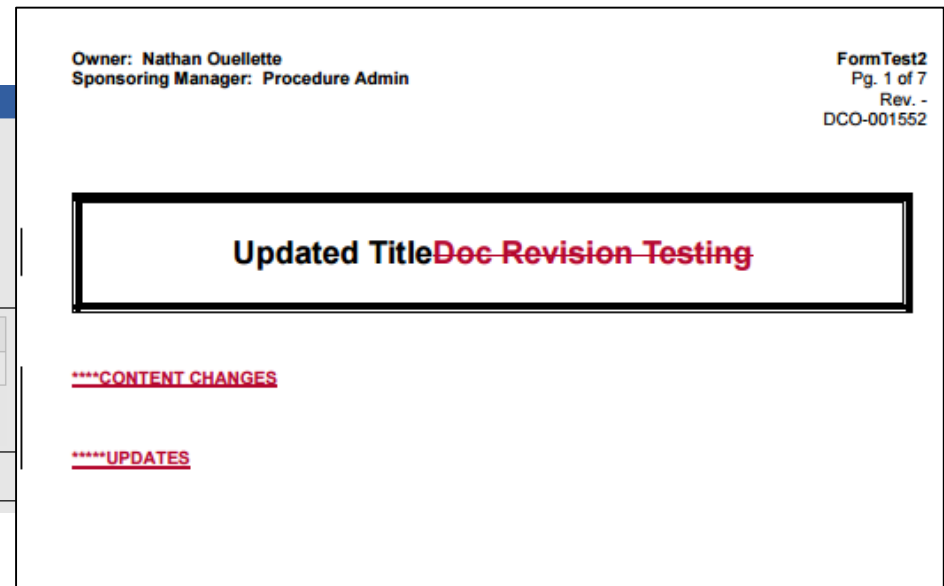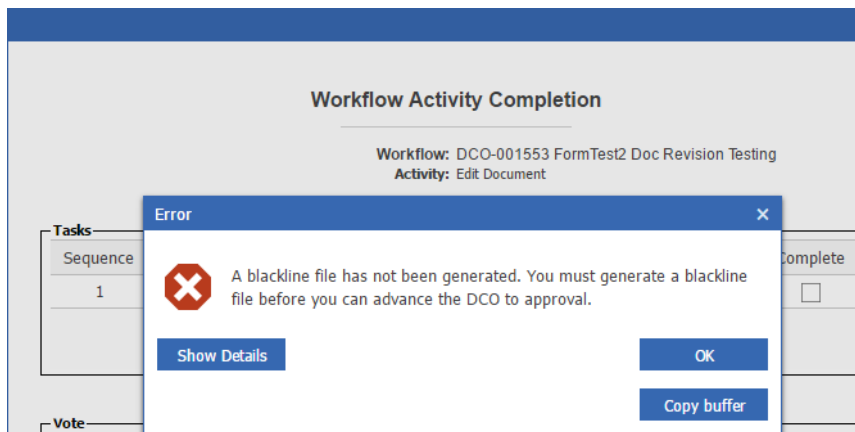
Business Rules

INTELLIGENT PROCESSES THAT ALIGN WITH CUSTOMER GOALS

Document File Limit Validation

– Logic in methods are configured to run validation checks on certain events in the UI – like on Save – to check for data quality issues

– Checks are configured to verify if duplicate blackline or viewable files have been attached in error

Business Rules

INTELLIGENT PROCESSES THAT ALIGN WITH CUSTOMER GOALS

Workflow Roles automatically populated and restricted to certain user groups

- Custom methods tied into Document creation add the Document Owner's manager as an approver
- Another method controls the search results for the role on the Document Form to only include members of a Manager AD Group

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Business Rules

INTELLIGENT PROCESSES THAT ALIGN WITH CUSTOMER GOALS

Document Creation Based on Role

- Document Creation is dictated by the type of document mapped to appropriate roles in the system
  - Tied to Active Directory Groups
- Permissions enforce who is able to search for and find documents

Business Rules

INTELLIGENT PROCESSES THAT ALIGN WITH CUSTOMER GOALS

Document Link to Related Item Checking

- Preference Configurations allow for controlling the types of linked objects that are allowed per Document Type
  - Parts (Items) and Projects
- Tied to integrations with SAP and our internal Project Management System
- Linking is configured to validate the linked item is of the expected type
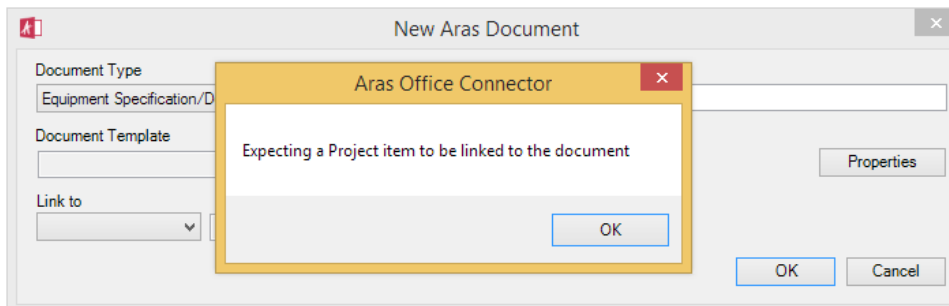
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Business Rules

INTELLIGENT PROCESSES THAT ALIGN WITH CUSTOMER GOALS

Document Relationship Constraints based on Type

– Custom method blocks child relationships from being created for documents that are to be children only

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Reporting and Configured Notifications

KEEPING PROCESS OWNERS AND STAKEHOLDERS ENGAGED

Automatic Review Cycle for Documents

- Documents that require reviews after a specified duration are automatically initiated by Innovator
- Use RemoteInBasket application for voting directly from email notifications

Reporting and Configured Notifications

KEEPING PROCESS OWNERS AND STAKEHOLDERS ENGAGED

Document Change Order (DCO) PDF Reports

– Reports automatically generated and attached to completed DCOs that can be utilized directly by customers

LORD Document Change Order			
DCO Number	**DCO Title**	**New Revision**	**Document Type**
DCO-001626	ProcedureTest ACE Presentation Prep	-	Procedure

Change Reason
New document

Signoffs					
Role	**Name**	**Title**	**Department**	**Action**	**Date**
Document Owner	Nathan Ouellette	Sr IS Specialist	Global Technology & Quality	Submit for Approval	3/15/2017 3:50:55 PM
Sponsoring Authority	Procedure Admin			Delegate	3/15/2017 3:51:28 PM
Sponsoring Authority	Nathan Ouellette	Sr IS Specialist	Global Technology & Quality	Approve	3/15/2017 3:52:10 PM
Approver	Nathan Ouellette	Sr IS Specialist	Global Technology & Quality	Approve	3/15/2017 3:52:21 PM

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Reporting and Configured Notifications

KEEPING PROCESS OWNERS AND STAKEHOLDERS ENGAGED

Active DCO Report

- – Custom email reports sent to managers outlining active tasks in Innovator of their direct reports
- – Automatically sent weekly using the Scheduler Service

Reporting and Configured Notifications

## KEEPING PROCESS OWNERS AND STAKEHOLDERS ENGAGED

Custom Security Report Available On-Demand

– Custom security report generation that displays permissions in Innovator based on Active Directory group membership

– An audit requirement that is easy to produce through Innovator

  • Excel format that is sortable

  • Available on-demand by Administrators; Always current

| Identity	Item Type	Export Class	Access (Discover includes Get)	Assigned to Identity
ActiveDirectoryGroup-Example	Item-Example	EXAMPLE	UPDATE	ItemType_EXPORT CLASSIFICATION_LIFECYCLE STATE
ActiveDirectoryGroup-Example	Item-Example	EXAMPLE	GET	ItemType_EXPORT CLASSIFICATION_LIFECYCLE STATE
ActiveDirectoryGroup-Example	Item-Example	EXAMPLE	UPDATE	ItemType_EXPORT CLASSIFICATION_LIFECYCLE STATE
ActiveDirectoryGroup-Example	Item-Example	EXAMPLE	GET	ItemType_EXPORT CLASSIFICATION_LIFECYCLE STATE
ActiveDirectoryGroup-Example	Item-Example	EXAMPLE	GET	ItemType_EXPORT CLASSIFICATION_LIFECYCLE STATE
ActiveDirectoryGroup-Example	Item-Example	EXAMPLE	UPDATE	ItemType_EXPORT CLASSIFICATION_LIFECYCLE STATE
ActiveDirectoryGroup-Example	Item-Example	EXAMPLE	GET	ItemType_EXPORT CLASSIFICATION_LIFECYCLE STATE
ActiveDirectoryGroup-Example	Item-Example	EXAMPLE	DISCOVER	ItemType_EXPORT CLASSIFICATION_LIFECYCLE STATE
ActiveDirectoryGroup-Example	Item-Example	EXAMPLE	UPDATE	ItemType_EXPORT CLASSIFICATION_LIFECYCLE STATE

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Dashboards

TAILORED VISUALS OF KEY PERFORMANCE INDICATORS
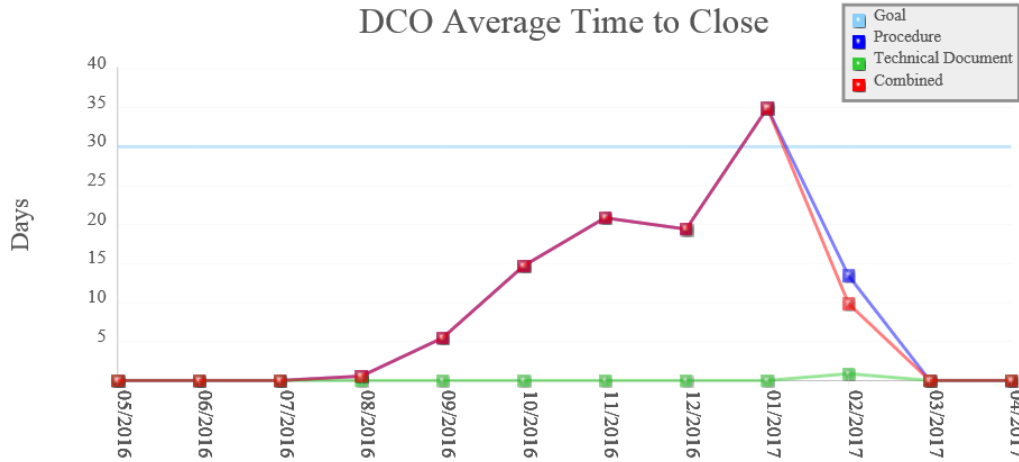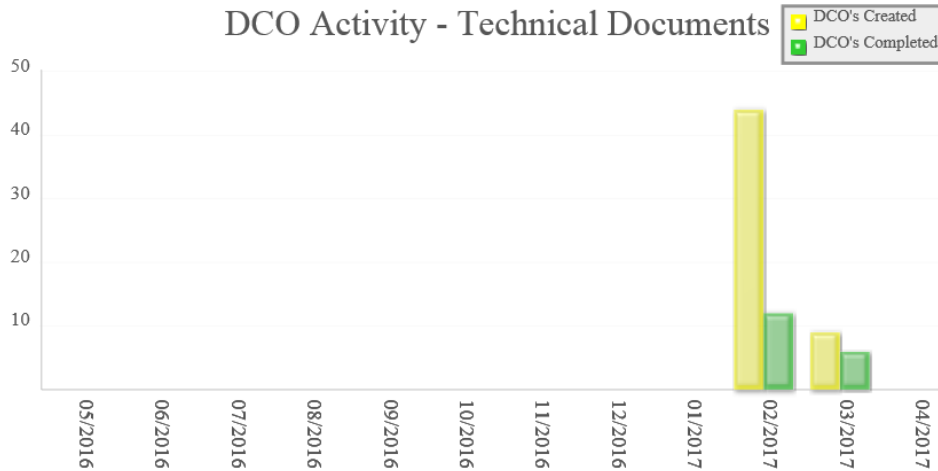

Overall Document Change Efficiency View

Document Type Activity Breakdown – Quality Documents
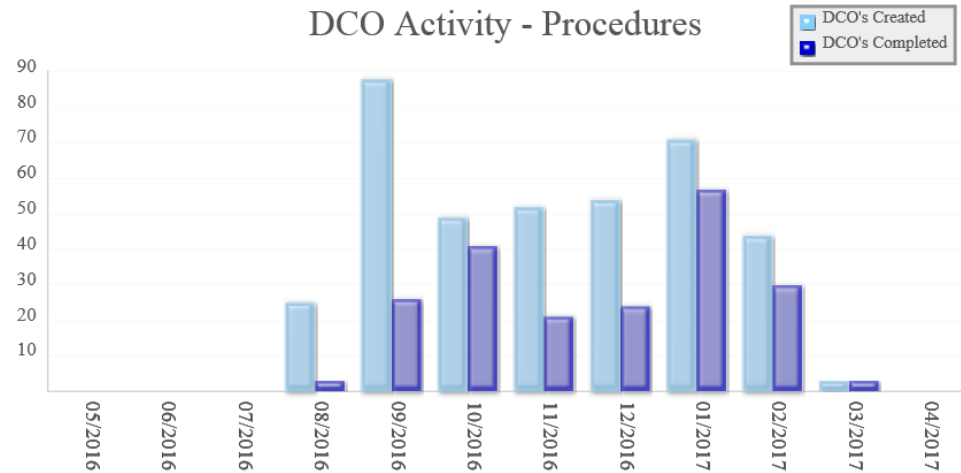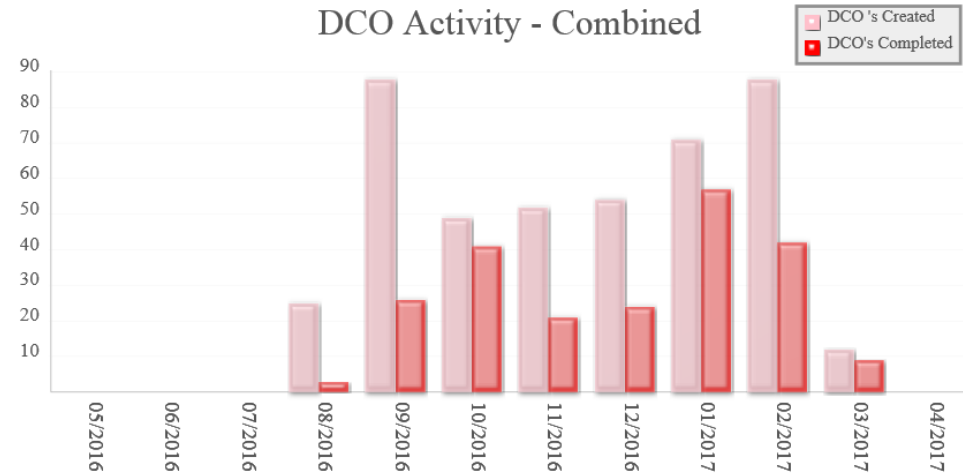
Dashboards

TAILORED VISUALS OF KEY PERFORMANCE INDICATORS

Document Type Activity Breakdown – Technical Documents

Combined Document Change Activity Per Month

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THANK YOU

Nathan_Ouellette@lord.com