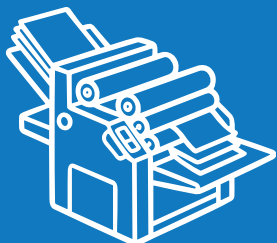




## CASE STUDY

# From Static Documents to Digital Work Instructions: A Global Equipment Manufacturer's CDS Mentor™ Journey



## CHALLENGE

Legacy assembly procedures created in Microsoft Word became increasingly difficult to maintain, update, translate, and scale across global manufacturing operations.

## SOLUTION

CDS Mentor™ centralized work instructions, training, quality checks, troubleshooting, translations, and traceability into one digital platform.

## RESULTS

The global equipment manufacturer standardized manufacturing documentation while improving consistency, revision control, and global deployment.

*"Before Mentor, operators relied on paper copies or local files, which created compliance risks and even led to audit findings. Now, updates are published instantly across our global manufacturing operations, ensuring every operator is always working from the latest approved version."*

**Process Engineering Lead,  
Global Equipment Manufacturer**

## THE CUSTOMER

A leading global manufacturer of industrial coding and marking equipment depends on detailed assembly and manufacturing procedures for production, repair, training, and quality assurance across multiple sites worldwide. After initially relying on the desktop-based CDS ProWork application, the company modernized its work instruction strategy by transitioning to CDS Mentor™, the next generation, cloud-based platform from CDS Visual. By consolidating legacy procedures from Microsoft Word and other disconnected formats into a single, cloud environment. The company established a scalable foundation for standardized work instructions, enhanced operator guidance, stronger revision control and consistent deployment across its global manufacturing operations.

## THE CHALLENGE

Before adopting digital work instructions, the global equipment manufacturer relied primarily on Microsoft Word to create and manage assembly procedures. These documents followed a simple format: images on one side, instructions on the other. While effective for simple tasks, the document format became increasingly difficult to maintain as products, configurations, and global operations grew more complex. Other key challenges included:

### **Formatting and maintenance burden**

Inserting or updating images often disrupted pagination, layout, and consistency. Authors spent unnecessary time manually fixing documents rather than improving content.

### **Limited usability on the shop floor**

Operators had to navigate lengthy documents and determine which instructions applied to specific tasks or product variations.

### **Slow and cumbersome global updates**

Engineering teams had to search through documents, make manual edits, and then distribute updates to multiple sites, increasing the risk of outdated procedures.

### **Manual translation workflows**

Supporting global teams for things like translating work instructions required effort from local engineering resources, requiring additional effort and introducing inconsistency.

### **Limited control over revision compliance**

Maintaining current documentation across the factory floor was difficult, particularly in regulated or quality-sensitive environments where outdated procedures could create compliance risks.

### **Complex product configuration management**

Product variations often required operators to interpret which steps applied to a particular build, creating opportunities for error.

## THE SOLUTION

### CDS Mentor™ for Digital Work Instructions

The global equipment manufacturer chose to consolidate assembly procedures from multiple legacy systems into a single platform using CDS Mentor™. The solution provides a scalable foundation for standardized work instructions, streamlined, improved quality, and greater control over manufacturing knowledge.

## Why the Manufacturer Chose CDS Mentor™

The global manufacturer chose CDS Mentor™ to consolidate assembly procedures from multiple legacy systems into a single platform. The solution provides a scalable foundation for standardized work instructions, streamlined global updates, improved quality, and greater control over manufacturing knowledge. Specifically, it offers:

#### Easier authoring and maintenance

CDS Mentor™ simplifies the creation and maintenance of visual work instructions, allowing authors to focus on content rather than formatting.

#### Better operator experience on the production floor

CDS Mentor™ provides step-by-step guidance that makes instructions easier to follow, enabling users to quickly search for and navigate to specific tasks, improving efficiency on the shop floor.

#### Centralized global deployment

A single, live system ensures teams worldwide always access the latest approved instructions, improving consistency and accelerating updates across eight global locations.

#### Built-in language support

CDS Mentor™ streamlines translation workflows, making it easier to deliver work instructions in multiple languages and support global operations.

#### Embedded quality checks and troubleshooting

For those product lines where work instructions include built-in quality checkpoints, operators can record measurements directly in the work instructions, while automated checks and guided troubleshooting help ensure quality and resolve issues consistently.

#### Training and skills management

CDS Mentor™ aligns procedures with operator qualifications, helping to manage training, enforce access controls, and support compliance with safety and quality requirements. This allows the company to:

- qualify operators by product line
- manage training matrices
- prevent unapproved users from performing certain work
- require supervisor intervention when necessary

#### Configurable work instructions

CDS Mentor™ dynamically displays only the steps relevant to a specific product or configuration, reducing complexity and minimizing the risk of errors.

#### Strong revision control and compliance

Digital revision control ensures operators always use current, approved procedures while maintaining a complete audit trail for quality and compliance purposes.



CDS Visual, a Dover company, is a leading cloud-based software provider helping manufacturers modernize sales, aftermarket, service, and partner engagement. By transforming and connecting complex product data, visualization, commerce, and collaboration workflows, CDS Visual enables manufacturers, distributors, dealers, and customers to work more efficiently across the commercial lifecycle from product discovery and configuration to parts ordering, service, and support. Visit [www.cdsvisual.com](http://www.cdsvisual.com) for more information.

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## THE RESULTS

### A Standardized, Digitally Managed Manufacturing Environment

The business value is already clear: The platform has helped the global equipment manufacturer move away from fragmented documentation processes and toward a more standardized, digitally managed manufacturing environment.

As adoption expands, CDS Mentor™ is expected to help improve operational consistency, accelerate the rollout of process changes, strengthen quality and compliance controls, and scale knowledge sharing across global sites. By bringing work instructions, training, troubleshooting, and traceability together in a single system, CDS Mentor™ is positioned to become a foundational platform for manufacturing excellence across the business.