



PLM Overview – Basic Training

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BT01 General functionality overview

Purpose	View and navigate PLM information, using features and user interface provided by PLM	Status	Define
Stakeholders	All users		
Beginning	Connect to PLM		
Interactions	Navigate PLM interface		
End			
Constraints	None		

Enovia PLM login and logout

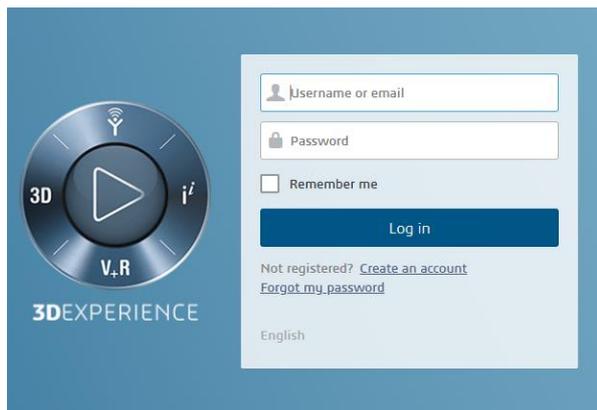
Enova PLM uses a web interface. Open the default browser and join the URL:

<https://3dspace17x.methode-emea.local/3dspace>

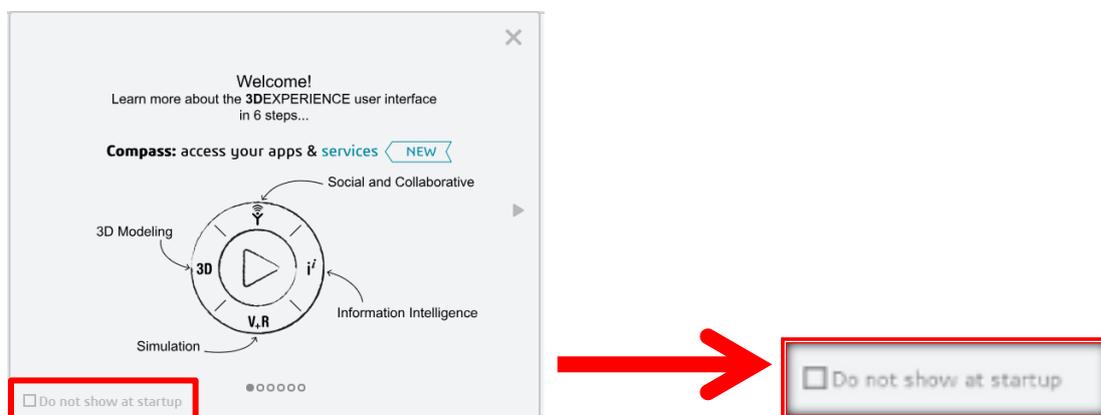
To log in (only if automatic login is not available):

In the Login web page, type in your username and password and click login. The PLM credentials are the same used for MEM windows domain.

NOTE: The login credentials are case sensitive.

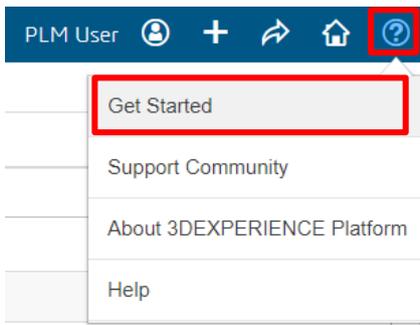


Note: If you access the PLM for the first time an overview of Enovia functions appears.

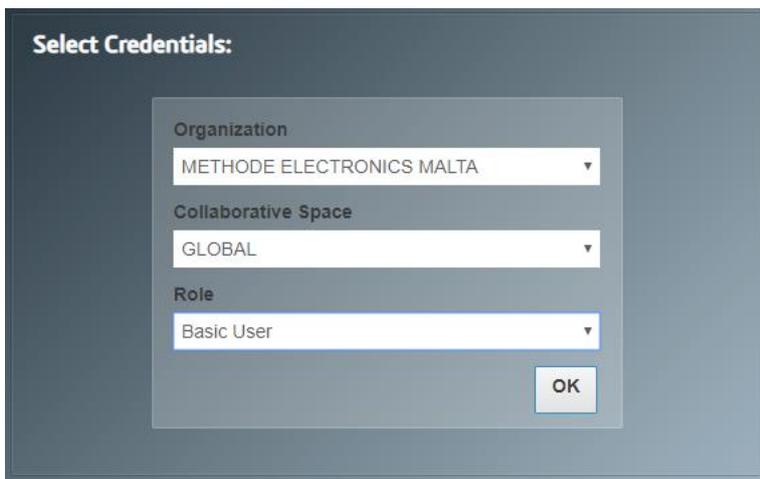


Click **Do not show at startup** if you do not want it to appear every time you log in. To show the overview again, select the **Help** menu and click **Get Started**.

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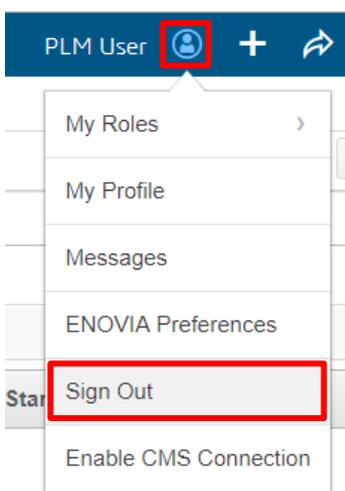
If you have several collaborative spaces or several roles inside PLM, the **Select Credentials:** dialog box will appear.



Select the required **collaborative space** and your **Role** than click ok

To log out:

from the top bar, select the ME icon and from the menu sign out



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Navigate Enovia PLM interface

The web interface has 3 different frames:

- Top bar
- Main menu
- Main page

The screenshot displays the Enovia PLM interface with three highlighted components:

- Top Bar:** Located at the top, it contains the 3DEXPERIENCE logo, the text "3DEXPERIENCE | ENOVIA Collaboration and Approvals", and navigation icons (search, home, refresh, etc.).
- Main Menu:** A vertical sidebar on the left side, containing a list of navigation options such as "Home", "Home RFQ User", "Home Project Lead", "Home Engineering User", "Requirements", "Summary Page", "Issues Summary", "Shortcuts...", "Collections", and "Utilities".
- Main Page:** The central workspace showing a "Home" page with tabs for "Tasks", "Issues", "Approval Tasks", "Approval Issues", "Projects", "My Calendar", and "Messages". The "Tasks" tab is active, displaying a table of assigned tasks. A red box highlights the "Main Page" label within this area.

Name	Slip Days	State	% Complete	Project	Est Start
Change Notice approval by management	0	Ready		A...	31-Jan...
Change management effort required to m	0	Ready		A...	12-Feb...
SK Drawing to order samples	0	Ready		A...	13-Feb...

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Item Details Page

The details page can be opened by:

1. Click on the name of the item to open the item details page on the main page

- The top bar is visible

- The following navigation buttons are available:



Note: icon instead of icon indicates that the page is not refreshed. Click to refresh the page.

2. Click on icon to open the item details in a new window

- Top bar is NOT visible

- Only the following navigation buttons are available:



Note: icon instead of icon indicates that the page is not refreshed. Click to refresh the page.

In the top area of the detail window of any item a short summary of main info about the object is displayed:

CA-0045325 Change Action	00010566 hazard cap material change	State : Complete Owner : Matthew Spiteri Modified : Jan 26, 2019 2:57:57 AM		
00010566 CAD Drawing (00A)	00010526 JLR hazard button cap	State : Publish Owner : Corporate Modified : Mar 28, 2018 11:16:43 AM		
00010566 Part (01)	Button Cap	State : Publish Owner : Corporate Modified : Jan 26, 2019 2:57:57 AM		

It shows:

- The image of the object (if available)
- The name of the object
- The type of the object
- The description of the object
- The state of the object
- The owner of the object
- The modified date of the object

It can be minimized using the icon:

00010566	State : Publish	
----------	-----------------	--

When minimized it shows only:

- The name of the object
- The state of the object

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Top Bar

The top bar provides access to common functions:



Icon overview



Compass button: it allows you to activate other PLM apps but, the Methode environment has been setup that all related apps used by the users are automatically activated upon login.



Search: the drop-down menu provides the addition functionality for a more defined search



6wtag: provides the functionality to refine the search result



Me: provides the information menu related to the user



Add: Allows user to create objects from a categories drop-down menu



Share: provides the user to share the current page. The function creates a link of the desired page in an outlook email message.



Home: quick access link to the user homepage



Help: link to help

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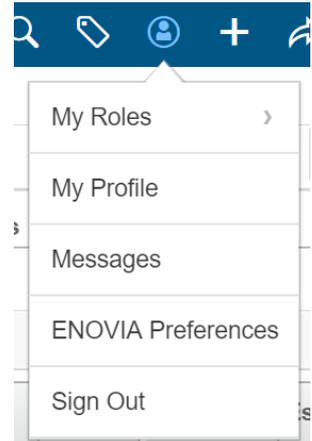


Me: User Preferences Menus

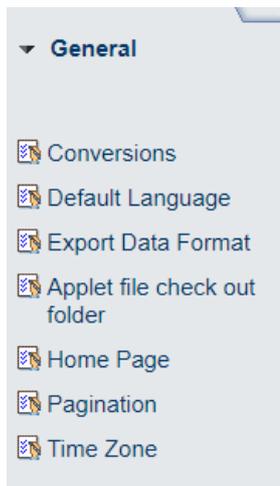
Provides access to user related information. The content of the menu can change depending on user role.

This menu contains the following items:

- **My Roles:** shows all roles assigned to the user allows users with multiple roles to toggle roles on/off.



- **My profile:** allows users to define personal information such name, phone, email, address, etc. It also allows users to setup out-of-office and, eventually, a delegate as Enovia operations.
- **Messages:** Enovia has an internal mail system, sending PLM alerts or communications between Enovia users. It's possible to receive, write, reply or forward these messages.
- **ENOVIA Preferences:** allows users to configure system preferences as shown below. The general preference menu is available to all users. Other preference menus are available only to users with particular roles.



- **Conversion:** allows users to set the Currency and Unit of measure
- **Default language:** allows users to set the language.
- **Export Data Format:** allows users to set the format and field separator for the data export operations.
- **Applet File Checkout Folder:** allows users set the default download folder. The default set is: C:\Users\\Documents.
- **Home Page:** allows users to customize their home page
- **Pagination:** allows users to setup pagination. If this option is selected, the user is able to set the number of items displayed per page.
- **Time Zone:** allows users to set their local time zone

Other preferences on general menu are available, but they are set by the PLM Administrator.

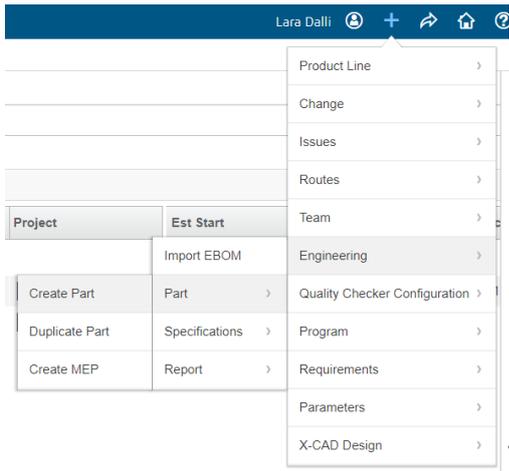
- **Sign out:** to log out



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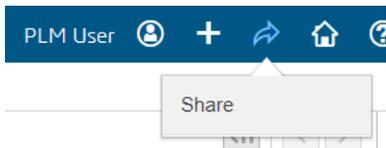
Add: Allows user to create objects from a categories drop-down menu



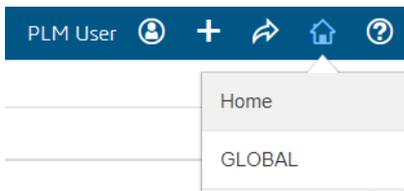
The user will be able to see some or all of the menus depending on the user's assigned licenses and roles in PLM.



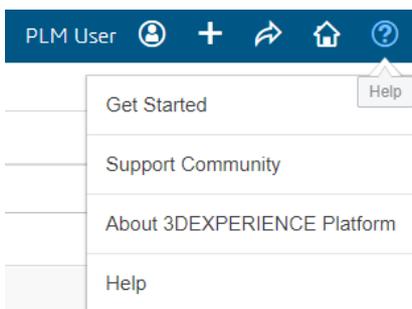
Share: Allows users to send the link of the current page by email



Home: Allows users to load their "home" page.



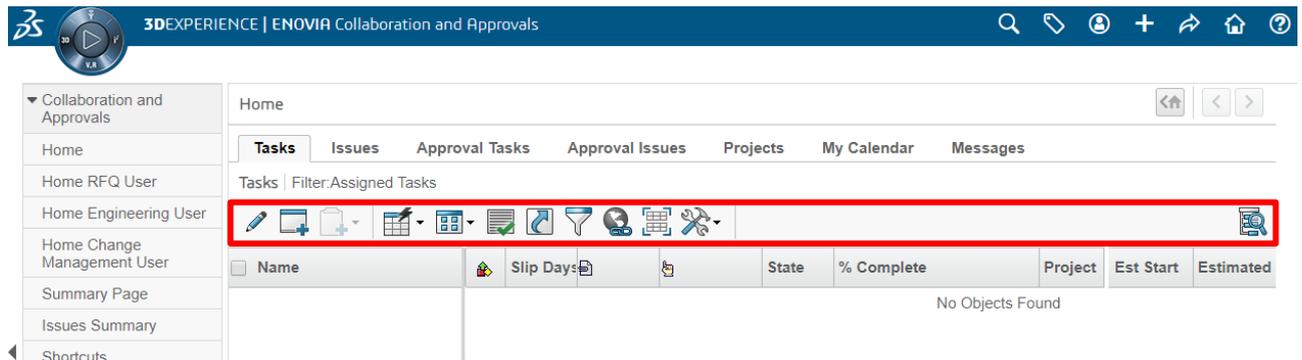
Help: Allows users to view the "Get Started", "Help" or "About 3DEXperience Platform" page



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Toolbar Icons

The screen shots below provide the description of the most common tools available on different pages. Other specialized tools will be covered later on in specific PLM operations.



This icon is only visible when the user has rights to edit the object within which the toolbar is found. Clicking this icon will enable edit mode which allows the user to make changes to certain fields. When in edit mode the icon changes to . Fields that can be edited within a table will have a black triangle at the top left corner of the cell. If a field does not have this mark when in edit mode, then the field cannot be edited by the user. To exit edit mode click the disable edit icon.



This icon will launch the corresponding or selected object in a new window.



When no object is selected, this icon is greyed out and cannot be used. When an object is selected (using a check box) this icon will be visible and enabled. Clicking on this icon will add the selected object to the clipboard which will open as a side panel on the right hand side. This panel can be closed from the CLOSE icon at the bottom right of the panel. Using the drop-down arrow next to the icon allows the user to choose whether to add the object to the clipboard or to another collection.



Selecting the adjacent arrow allows users to select from pre-defined table views. Clicking on the icon itself allows users to customize their table view (move or insert new columns) of the current page (in the example, the Tasks page). Once a new table is setup, the user is required to name and save this view. The user is always able to reset the customization using "Reset To Default". The current table view being shown is always displayed on top of the toolbar (for example, Filter: Assigned Tasks)

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Allows users to switch the visualization of the objects in the current page:

- **Table** (default)
- **Thumbnail**



Allows users to expand the table cells to the full height to read the entire text. Click on the icon again to collapse the cells.



Provides shortcuts to "Recently Viewed" items and personal "Clipboard". Click on to close the side menu.



Allows users to refine their query by opening the Search Refinement menu. Click on to close the side menu.



Shows the URL of the page (copy/paste operation is available to share the page)



Opens the sub menu to create row grouping of the results guided by one or more attributes:

Description		Revision			Apply	Reset
<input type="checkbox"/>	Display Name ▲	Description	Revision		Type	
<input checked="" type="checkbox"/>	CAD DATA A Surface, electrical schematics, pa					
<input type="checkbox"/>	GLOVE BOX COMPARTMENT SWITCH (2)					
<input type="checkbox"/>	00A (2)					
<input type="checkbox"/>	1.206902	GLOVE BOX C...	00A		Part	
<input type="checkbox"/>	206902	GLOVE BOX C...	00A		Part	
<input type="checkbox"/>	GLOVE BOX RELEASE 305 CPS (3)					
<input type="checkbox"/>	00A (3)					
<input type="checkbox"/>	1.960211	GLOVE BOX R...	00A		Part	
<input type="checkbox"/>	1.960211M	GLOVE BOX R...	00A		Part	
<input type="checkbox"/>	EP3000111	GLOVE BOX R...	00A		Part	

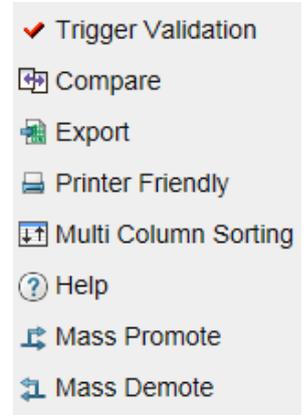
- *Apply* to filter
- *Cancel* to return to the default visualization

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The Tool menu, although this icon is present in most toolbars, it may contain different list of commands. Some of the following commands are available once one or more objects are selected, whereas some others are presents only in specific tables:

- **Trigger validation:** validation triggers are the checks performed by PLM when an object moves from one state to another, during lifecycle management. The command shows all the validation triggers of one or more object previously selected; users can create a Validation report that can be printed or exported
- **Compare:** it allows users to compare two or more selected objects.
- **Export:** export the result list in the default export format
- **Printer Friendly:** it creates the printable format of the result list
- **Multi column sorting:** it sorts the results using more columns
- **Help:** link to help
- **Mass promote:** it allows the promotion of a number of objects together. The objects must have the same life cycle status.
- **Mass demote:** it allows the demotion of many objects together. The objects must have the same starting state.



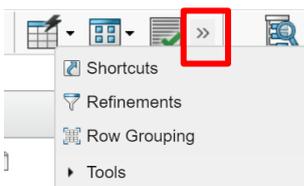
Clicking this icon will open a search field through which the user can search for a word **found within the current page**. When the search is launched the field will show the number of results found. The user can scroll through these results using the left and right arrows next to the search field. Clicking on the icon again will hide the search field.



See example below:

Name	Slip Days	State	% Complete	Project	Est Start	Estimated Finish Date	Act Start	Notes
<input checked="" type="checkbox"/> Change Notice approval by management	2	Ready		AAA1	31-Jan-2019	07-Feb-2019		
<input type="checkbox"/> Change management effort required to manag	0	Ready		AAA1	12-Feb-2019	12-Feb-2019		
<input type="checkbox"/> SK Drawing to order samples	0	In Work	∞	AAA1	13-Feb-2019	13-Feb-2019	11-Feb-2019	
<input type="checkbox"/> Change in led colour	0	Ready		AAA1	18-Feb-2019	01-Mar-2019		

NOTE: Depending on screen size and number of toolbar icons, not all icons may be displayed in the toolbar. In such cases when all icons do not fit in the toolbar a double arrow icon will be shown after the last visible icon. Clicking on this function will show a drop down menu with all remaining toolbar icons.



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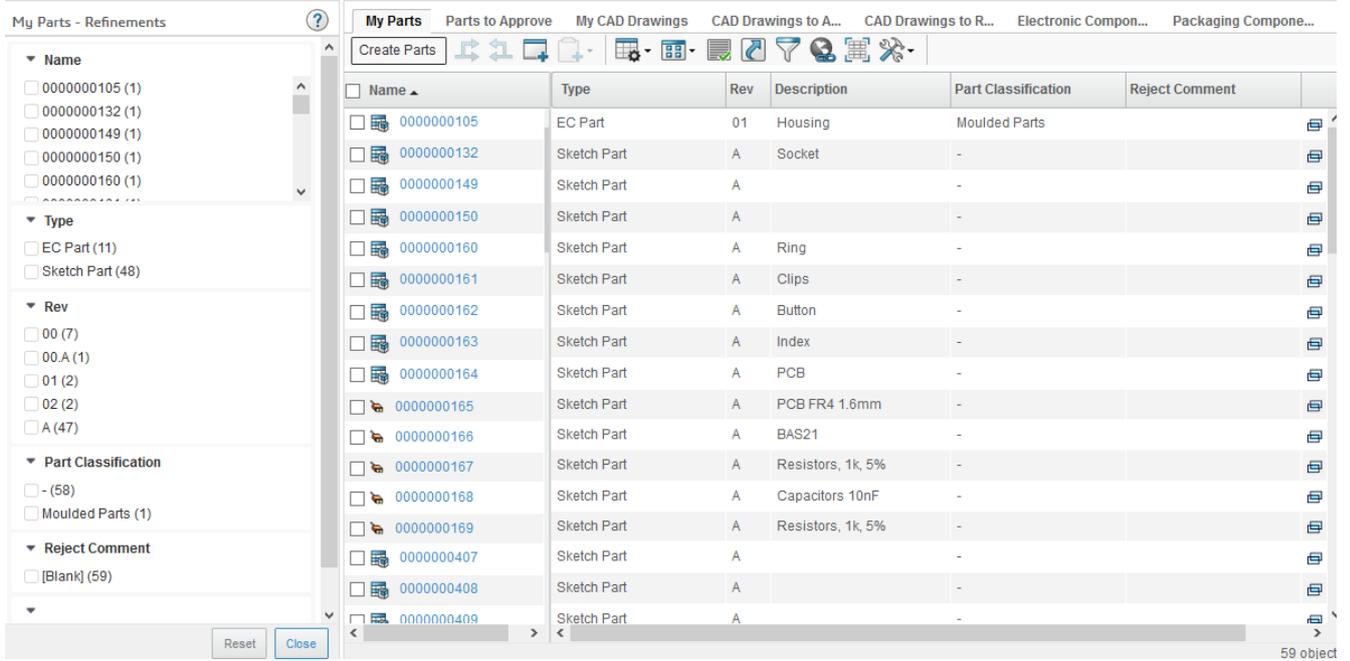


Refinement

The toolbar related to parts and drawings tables contains the refinement icon:

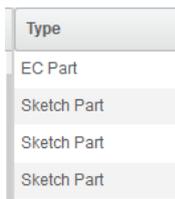
The icon allows users to refine their query by opening the Search Refinement form.

The form shows all attributes contained in the current table:



The form also shows, for each attributes, the value contained in the search result table, with the count of attribute value occurrences:

Search result:



Refinement form:



The user can filter the result selecting the attribute value.

For example, to see only part of type “EC Part”, select the checkbox related to “EC Part (14)”

Snapshot BEFORE the selection:

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My Parts - Refinements

My Parts Parts to Approve My CAD Drawings CAD Drawings to A...

Create Parts

Name Type Rev Description Pa

Name	Type	Rev	Description
0000000105 (2)	EC...	01	Housing
0000000132 (1)	Sket...	01.A	Housing
0000000149 (1)	Sket...	A	Socket
0000000150 (1)	Sket...	A	
0000000160 (1)	Sket...	A	Ring
0000000161	Sket...	A	Clips
0000000162	Sket...	A	Button
0000000163	Sket...	A	Index
0000000164	Sket...	A	PCB
0000000165	Sket...	A	PCB FR4 1.6mm

Reset Close

65 objects

Snapshot AFTER the selection:

After selection (users can recognize the attribute filtered from icons contained in column header)

My Parts - Refinements

My Parts Parts to Approve My CAD Drawings CAD Drawings to A...

Create Parts

Name Type Rev Description

Name	Type	Rev	Description
0000000105 (1)	EC Part	01	Housing
0000000552 (1)	EC Part	00	Switch Window lifter
0000000557 (1)	EC Part	00	PCB
0000000559 (1)	EC Part	02	New Switch for test CMS
0000000588 (1)	EC Part	02	New Switch for test CMS
0000000622	EC Part	00	PCB FR4 1.6mm
0000000623	EC Part	00	BAS21
0000000624	EC Part	00	Resistors, 1k, 5%
0000000625	EC Part	00	Capacitors 10nF
0000000626	EC Part	00	Resistors, 1k, 5%
000007092	EC Part	00	

Reset Close

14 objects

To undo the filter, select command Reset.

Reset

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Search functionality

The search operations are performed using the search field in top bar.

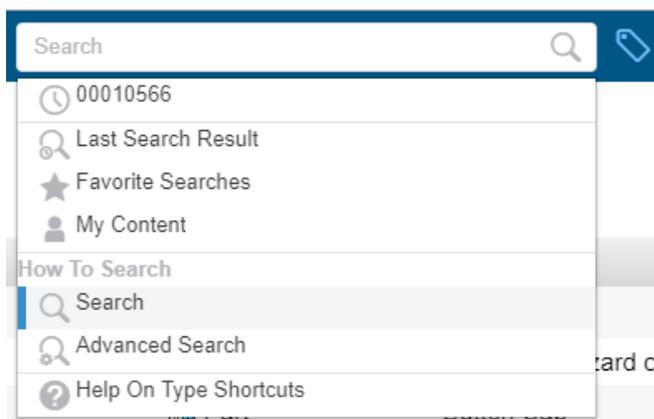


A general query can be performed by entering the required attribute (code, description, etc.) then clicking on  search icon or pressing enter.

Note: "*" used as wild card is not necessary because the search is automatically expanded to all the objects that have the searched word inside.

When clicking inside the search field a dropdown list will be shown with a number of search options:

- **Recent search terms** (if available) – Will show the search result for that search term.
- **Last Search Result** – Will show the last search result.
- **Favorite Searches** – will list the user's saved searched
- **My Content** - Will display list of objects which are owned by the user in PLM.
- **How To Search:** Defines the type of search
 - **Search** – General search (*default*).
 - **Advanced Search** – allows user to specify further search criteria.
- **Help On Type Shortcuts:** Brings up predefined query text which can be used to make a search.

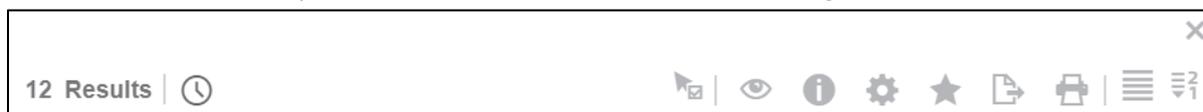


Once the search operation is launched, the search results and search toolbar will be shown on the main page and the main menu on the left hand side will be replaced with the 6WTags filtering options.

Actions	Name	Revision	Type	Description	Maturity	Modificati...	Creation Date	Responsible
1	00010566	00	Part	Button Cap	EC Part Re...	1/26/2019 ...	11/30/2017 ...	Corporate
2	CA-0045325	-	Change ...	00010566 ...	Change Act...	1/26/2019 ...	1/30/2018 ...	Matthew S...
3	00010566	01	Part	Button Cap	EC Part Re...	1/26/2019 ...	4/10/2018 ...	Corporate
4	10121271	00	Part	paint jig for ...	EC Part Re...	1/25/2019 ...	5/17/2018 ...	Yosef Cori
5	00010566	A	Part	Button Cap	Developme...	1/25/2019 ...	9/14/2016 1...	Evan Stringos
6	00010566	01D	CAD Dr...	00010526 ...	PDS_CAD...	11/5/2018 4...	11/5/2018 3...	Corporate
7	00010566	01C	CAD Dr...	00010526 ...	PDS_CAD...	11/5/2018 4...	9/27/2018 ...	Corporate
8	00010566	01B	CAD Dr...	00010526 ...	PDS_CAD...	9/27/2018 ...	3/28/2018 ...	Corporate
9	MCO-0036...		MCO	00010566 ...	MCO Stand...	9/8/2018 1...	9/8/2018 1...	Corporate
10	CR-0000162	-	Change ...	00010566 ...	Change Re...	9/8/2018 1...	1/30/2018 1...	Stanley Mul...
11	CO-0046592	-	Change ...	00010566 ...	Fast track ...	9/8/2018 1...	3/6/2018 6...	Stanley Mul...
12	00010566	00A	CAD Dr...	00010526 ...	PDS_CAD...	3/28/2018 1...	12/7/2017 ...	Corporate

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The search toolbar on top of the search results contains the following items:



- **XX Results** – Displays the number of search results found.
- **My recent content options:**
 - **Results in my recent content** – searches for results within the user’s recent content.
 - **All my recent content** – brings up all recent content created by the user
- **Multi selection mode** – when on, it allows user to select multiple objects simultaneously. The adjacent drop down allows user to select or unselect all results.
- **Preview** - Changes results view to show object image as preview with results ribbon below. Scroll through the results using the icons. Toggle object properties by clicking the icon. Exit preview by clicking on the icon at the top right corner.
- **Information** – shows/ hides selected object properties.
- **Customize columns** – Only available in data grid view.
- **Favorite search** – Opens a small window which allows the user to add the search to favorites. The user can also access favorite searches through the link at the bottom of the window. Saved searched make take up to a few minutes to be visible in the user’s favorites.
- **Export** – Downloads the search results in CSV format.
- **Print** – prints the search results in printer friendly format (ensure pop-ups are not blocked for this feature to work)
- **View** – User can change between thumbnail, tile or data grid view.
- **Sort** – Provides some standard options to sort the search results.
- **Close** – the search can be closed from the top right icon.

NOTE: USER MUST CLOSE THE SEARCH TO GO BACK TO HOME SCREEN.

The search results table in data grid view contains the following information:

<input type="checkbox"/>	Actions	Name	Revision	Type	Description	Maturity	Modification Date	Creation Date	Responsible
1		00010566	00	Part	Button Cap	EC Part.Release;Pro...	1/26/2019 3:01:58 AM	11/30/2017 9:19:15 AM	Corporate
2		CA-0045325	-	Change Action	00010566 hazard ca...	Change Action.Com...	1/26/2019 2:57:57 AM	1/30/2018 12:00:09 ...	Matthew Spiteri
3		00010566	01	Part	Button Cap	EC Part.Release;Pro...	1/26/2019 2:57:57 AM	4/10/2018 1:35:10 PM	Corporate
4		10121271	00	Part	paint jig for 0001056...	EC Part.Review;Pro...	1/25/2019 9:47:12 PM	5/17/2018 1:17:14 PM	Yosef Cori
5		00010566	A	Part	Button Cap	Development,EC Pa...	1/25/2019 8:34:48 PM	9/14/2016 11:32:07 AM	Evan Stringos
6		00010566	01D	CAD Drawing	00010526 JLR hazar...	PDS_CADDrawing...	11/5/2018 4:25:32 PM	11/5/2018 3:48:24 PM	Corporate
7		00010566	01C	CAD Drawing	00010526 JLR hazar...	PDS_CADDrawing...	11/5/2018 4:25:32 PM	9/27/2018 10:17:29 ...	Corporate
8		00010566	01B	CAD Drawing	00010526 JLR hazar...	PDS_CADDrawing...	9/27/2018 3:38:30 PM	3/28/2018 10:25:11 AM	Corporate
9		MCO-0036948		MCO	00010566 hazard ca...	MCO Standard Impl...	9/8/2018 10:10:05 AM	9/8/2018 10:05:57 AM	Corporate
10		CR-0000162	-	Change Request	00010566 hazard ca...	Change Request.Co...	9/8/2018 10:05:54 AM	1/30/2018 11:56:08 AM	Stanley Muller
11		CO-0046592	-	Change Order	00010566 hazard ca...	Fast track Change.C...	9/8/2018 10:05:54 AM	3/6/2018 6:58:22 PM	Stanley Muller
12		00010566	00A	CAD Drawing	00010526 JLR hazar...	PDS_CADDrawing...	3/28/2018 11:16:43 AM	12/7/2017 4:20:46 PM	Corporate

- **Checkbox** – allows user to select the object from the list of search results.
- **Actions** – clicking on the arrow will open a drop-down menu which allows the user to:
 - Select all results
 - Unselect all results
 - Add object to collections for quick retrieval (pop-ups must not be blocked) (*refer to collections for more information*)
 - Add object to clipboard for quick retrieval (pop-ups must not be blocked) (*refer to collections for more information*)
 - Display detail of that object (will open on the same page)

NOTE: The same Actions options become available in a dropdown when you right-click on the part name.

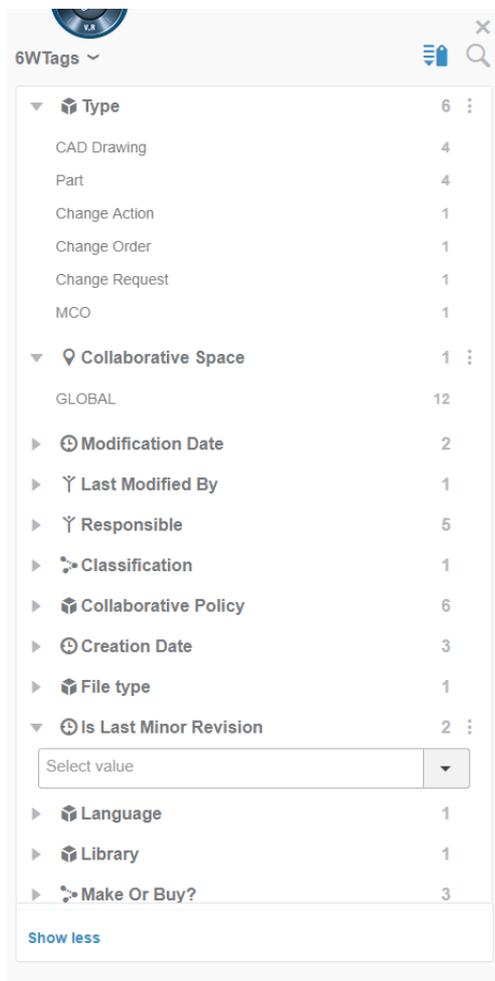
Version	4.0	Date:	27-November-2017
Status	Released		17

- **Name** – Object name
- **Revision** – Object revision.
NOTE: ALL REVISIONS OF THE SEARCH RESULTS ARE SHOWN BY DEFAULT IN THE RESULTS – sort by revision column or use search filter to identify which is the latest revision for the object.
- **Type** – Object type
- **Description** – Object description
- **Maturity** – Object’s current lifecycle state
- **Modification date** – Date and time when object was modified last.
- **Creation date** – Date and time when object was created.
- **Responsible** – Person who owns and is responsible for the object in PLM.

Tip: Sorting columns - Clicking on the column name in a table will sort the table by that column in ascending order. Clicking on the name again will sort the table again in descending order.

(Example: To view the highest revision at the top of the search results, click the revision column twice)

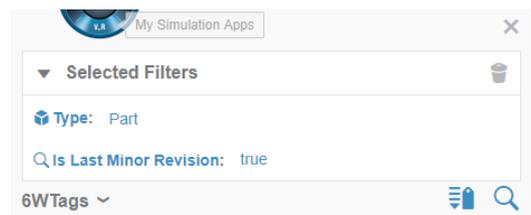
Once the search operation is launched, the 6WTags menu is displayed on the left hand side instead of the main menu. Many options are available to refine the search. Some tags are hidden by default and user needs to click “show all” found at the bottom left hand side of the page.



- **6WTags** Using the drop-down arrow, the user can select which tags are visible in this panel.
-  User can sort the tags in different ways according to drop down options from this icon
-  User may search for specific tags values.

- User can filter search results by clicking on any of the tag values (example: clicking “CAD drawing” value under the “Type” tag)

- Any filters applied to the search will be shown at the top of the 6WTags panel:



- User may remove one or all the applied filters by either clicking on the filter to be removed from this section or reset all filters using the  icon.
- The tags panel can be closed from the  icon. This can be opened again using the  icon near the search field.

Tip: to filter all search results to show only the latest revision user must:

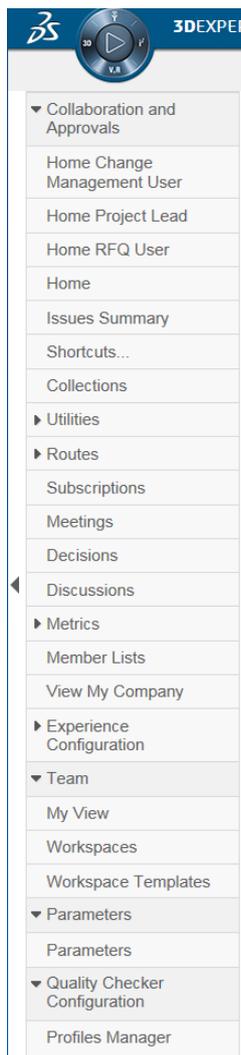
1. Click “show more” to expand the tags available
2. Find the tag “Is Last Minor Revision”
3. Set the drop down value for this tag as TRUE and allow the search to reload.

Version	4.0	Date:	27-November-2017
Status	Released		18

BT02 Main Menu / Categories

Purpose	Different home pages definition	Status	Define
Stakeholders	All users		
Beginning	Connect to PLM		
Interactions	Navigate PLM interface		
End			
Constraints	None		

This chapter describes the content of different home pages. The availability of these home pages will depend on the roles that have been assigned to the user; this means that not all users will see all of these different home pages described below.



The arrow  on the left side of the menu allows users to hide or unhide the main menu

Version	4.0	Date:	27-November-2017
Status	Released		19

Summary Page

This tab is available to all users. The users can managed different types of information, (Tasks, Issues, Approval Tasks, Approval Issues, Projects, etc.); in order to check for any updates the user needs to switch between these different tabs. The Summary Page captures in one screen a summary of all of these items.

The page will contain a number for each type of object that is visible in the Home page and in each dedicated home page by roles.

The screenshot shows the 'Summary Page' interface. On the left is a navigation menu with options: Collaboration and Approvals, Home, Home RFQ User, Home Engineering User, Home Change Management User, **Summary Page** (highlighted with a red box), and Issues Summary. The main dashboard displays the following counts:

- Tasks: 454
- Approval Tasks: 0
- Issues: 0
- Approval Issues: 2
- Change Requests: 1 (with sub-counts 10 and 132)
- Change Actions: 4
- My Parts: 144
- Approval Parts: 696
- Sketch to EC Parts: 812 (highlighted with a red box)
- CAD Drawings to A...: 412

The summary page is composed of two portions:

- A header, used to show the number of objects of interest to user connected. The number will be a hyperlink to the corresponding tab.
- A table used to show the objects of type selected in the header.

For example: selecting the icon related to “Sketch to EC Parts”, the table will show the corresponding objects.

This screenshot shows the detailed view of the 'Sketch to EC Parts' category. The '812' count is highlighted with a red box. Below the dashboard is a table with the following columns: Name, Phase, Revision, Description, Owner, Type, Part Classification, and Reject Comment. The table contains 9 rows of data:

Name	Phase	Revision	Description	Owner	Type	Part Classification	Reject Comment
00000136	Development	B		Matthew Spiteri	Part	-	
00000631	Development	A	Packed 57293	Samantha Grima	Part	Miscellaneous	
00001500	Development	A	Level Sensor	Samantha Grima	Part	-	
00002360	Development	A		Daniel Fellmin	Part	-	
00002390	Development	A	Housing	Evan Stringos	Part	Moulded Parts	
00002406	Development	A	Bezel	Evan Stringos	Part	Moulded Parts	
00002416	Development	A	Slider	Evan Stringos	Part	Moulded Parts	
00002426	Development	A	Button Cap	Evan Stringos	Part	Moulded Parts	
00002436	Development	A	Rubber Mat	Evan Stringos	Part	Rubber Parts	

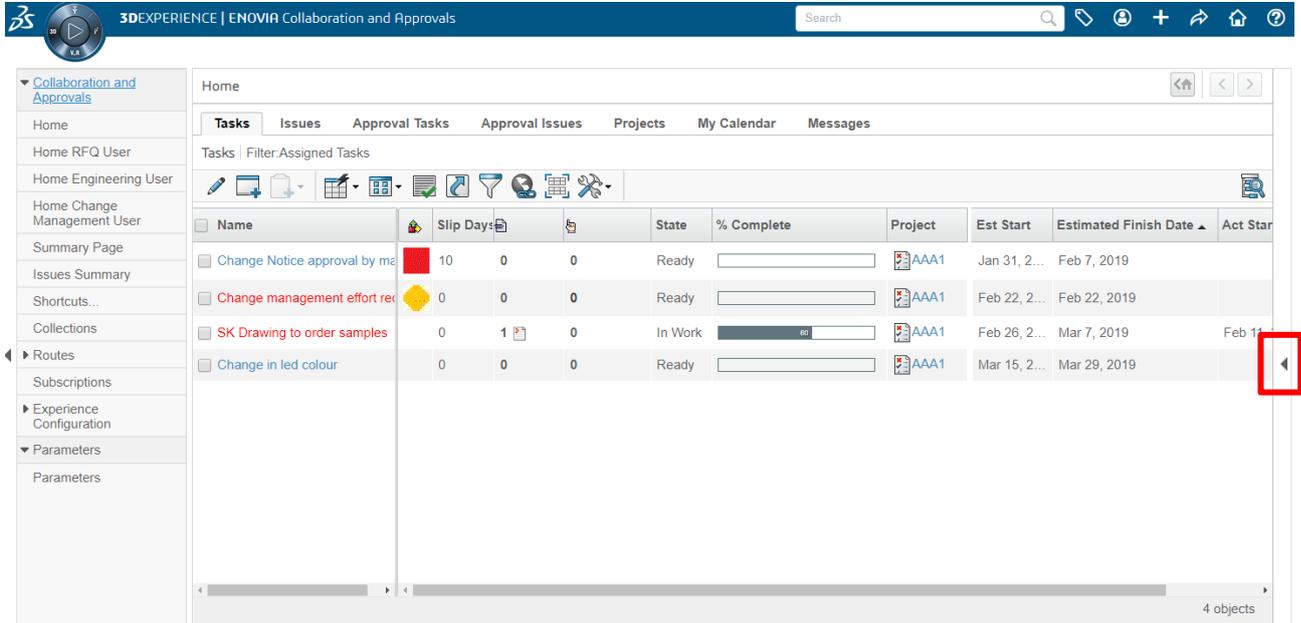
At the bottom right of the table, it indicates 'Page 1 of 28'.

Version	4.0	Date:	27-November-2017
Status	Released		20

Home

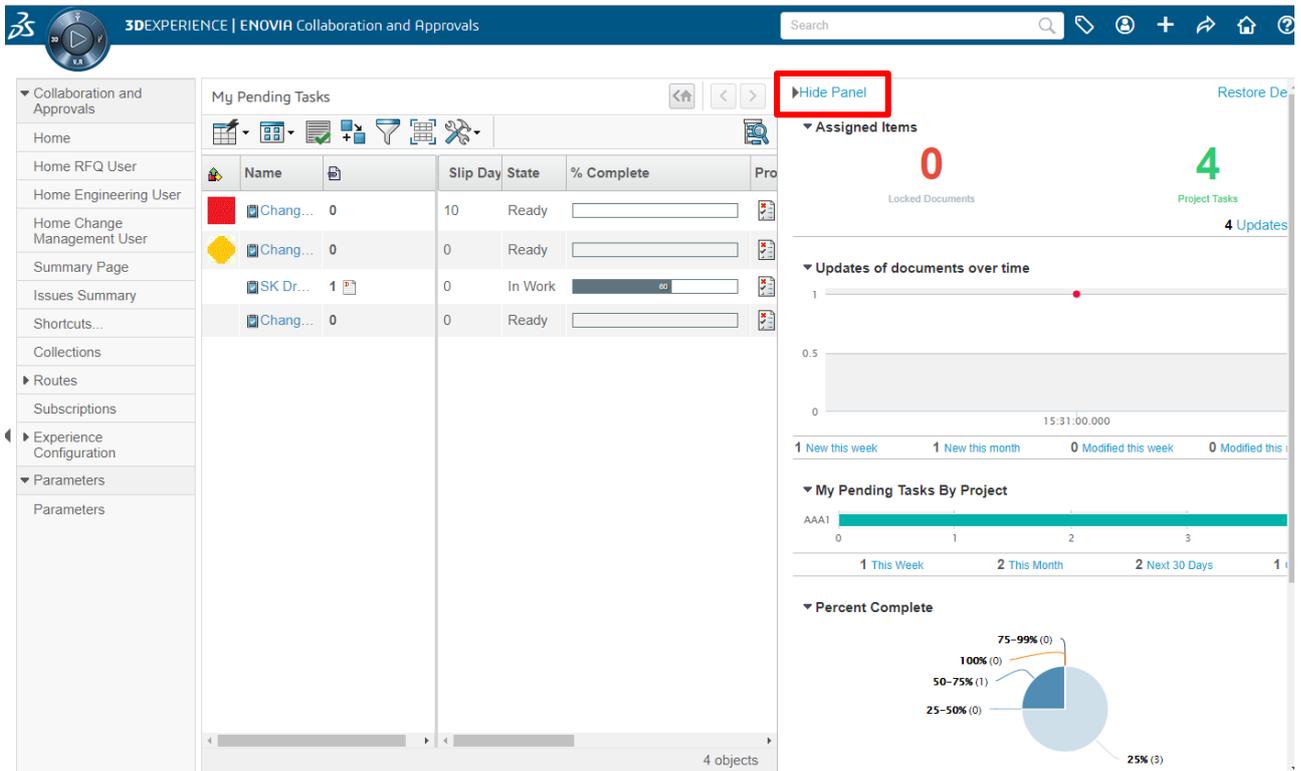
The Home page is available to all users and is the default home page (this default setting can be changed through the aforementioned Enovia preferences menu).

In the Home page, the user can click on the on the arrow shown on right hand side of the page to expand a side panel containing a graphical dashboard of items relating to the user.



The dashboard contains summarized information with live links. When clicking on the live links, the corresponding information will be shown on the main page in more detail.

Click on *Hide Panel* to collapse this side panel again.



Version	4.0	Date:	27-November-2017
Status	Released		21

The Home page contains the following tabs:

Tasks

In this tab all the tasks that have been assigned to the user are listed. Tasks are activities that have to be completed within a defined period or deadline.

In the Tasks window the following information is shown:

Name	Slip Days	Documents	Issues	State	% Complete	Project	Est Start	Estimated Finish Date	Act Start	Notes
Change Notice approval by management	9	0	0	Ready		AAA1	31-Jan-2019	07-Feb-2019		
Change management effort required to manage the	0	0	0	Ready		AAA1	22-Feb-2019	22-Feb-2019		
SK Drawing to order samples	0	1	0	In Work	50%	AAA1	26-Feb-2019	07-Mar-2019	11-Feb-2019	
Change in led colour	0	0	0	Ready		AAA1	15-Mar-2019	29-Mar-2019		

Columns:

Name: Name of the task. It will be displayed in red if the task is on the critical path of the project.

: Represent the state of the task:  = delay,  = approaching end date,  = complete.

Slip day: Delay days from the planned finish date of the task.

: Number of documents related to the task.

: Number of issues related to the task.

% completed: The percentage of the task that has been completed – updated by the assignee or project manager.

Project: The task is referred to the project listed here.

Est start: Estimated start date of the task – set by the project manager.

Est end: Estimated end date of the task – set by the project manager.

Act Start: Actual start date of the task – automatically recorded the first time any amount of progress is tracked on the task.

Act finish: Actual end date of the task – automatically recorded when task reaches state complete.

Version	4.0	Date:	27-November-2017
Status	Released		22

Toolbar icons:



Enable edit mode



Open the window page in another window



Clipboards is a collaborative tool, sort of repository, where the user can collect objects.

This tool allows users to save objects into a collection. If some collections already exist, they are listed in the roll-down menu. The user can chose to:

- add the selected objects to default clipboard
- add the selected objects to a user defined collections or/and create a new collections

Note: if no object is selected in the table, this icon is disabled and greyed out until an item is selected.

(All other Icons are standard as described in *Toolbar Icons* section of this document)

Tasks Details

Click on the name of the task to open the task information window

Name	Type	Id	Dependency	Duration	Start Date	End Date	Needs Review	State	%	Progress	Duration	Sta
SK Drawing to order samples	Task	6.FS+1.0 d		8.0 Days	26-Feb-2019	07-Mar-2019	1 0	Yes	In Work	60.0	0.0	11.4

Main menu:

Name of the task: page shows the breakdown structure and details of the task

Assignees: shows users assigned to the task and related commands

Issues: shows issues related to the task and related commands

Reference Document: contains documents uploaded as reference to this task

Collaboration: lists Bookmarks, Decisions and Meetings created against the task

Deliverables: lists the documents or items that must be submitted in order to complete the tasks

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Status	Released		23

Dependencies: shows the dependencies of the task in relation with other tasks (Start to Start/ Finish to start / Finish to Finish / Start to Finish) and the slack time.

i.e.: 3:FS+5.0d= the task is dependent on task ID3. The dependency is Finish to Start. The task 3 must finish before the task can start. There is a slack time of 5 days.

Properties: information about the task

Multiple Ownership Access: shows and manages access to the task for every project member.

Risks: lists any risks created against this task.

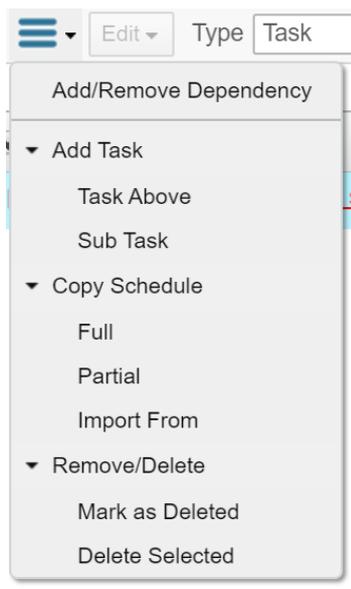
Routes & Approvals: lists of all routes or approvals related to the tasks

Toolbar icons:



NOTE: task or sub-task must be selected to enable some of the toolbar options

 Provides several commands related to tasks:



Add/Remove Dependency: allows to manage the internal or external dependencies of the selected task

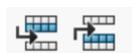
Add task: allows to create a new task above or below the selected

Copy schedule: allows to copy an existing schedule to the selected task:

- Copy entire schedule from another project/ project template
- Copy partial schedule from another project/ project template
- Copy schedule from ASCII file

Remove/Delete: allows to

- mark the selected task as deleted
- delete the selected task permanently



: allows users to create new tasks under or above the task selected.



: Indents/outdents selected task/tasks in the project schedule.



: Moves selected task/s up or down in the project schedule.



: Links two or more selected tasks with a finish-to-start dependency in the order they appear in the project schedule.

Version	4.0	Date:	27-November-2017
Status	Released		24



: Allows users to delete select tasks



: updates schedule according to assignees' location calendars. Must be used when assignee is changed to reflect any changes in calendar in the schedule.



Enable edit mode; allows users to edit timing plan information (estimated duration, start date and end date; actual start and end date, task name and description)



Expand structure: allows users to expand WBS for all levels or for specific number of levels

Other icons are common to other toolbars (see Home toolbar)

Version	4.0	Date:	27-November-2017
Status	Released		25

Issues

In this tab are listed all the issues assigned to the user in ACTIVE state.

													Estimated	Actual
Name	Edit	Reported Against	Classification	Description	Visibility	Domain	Action Taken	Priority	% Complete	Approver	Finish	Start		
<input type="checkbox"/> ISS-0000174		0 0000000010	Issue - A probl...	test	Internal	Design		Low	0		Feb 29, 2016			
<input type="checkbox"/> ISS-0000180		0 Alpha Test	Risk - Probabil...	test	Internal	-		Low	0		Feb 22, 2016	Feb 16, 2016		

Columns:

In the Issues tab the columns show the following information:

Name: name of the issue. It will be displayed in red if a sub task of it is in delay

Edit: contains a shortcut button to update the % completed and Action taken on the corresponding issue.

: represents the state of the issue: = delay, = approaching end date, = complete

: number of documents related to the task

Reported Against: item affected by the issue (can be a task/ part/ project/ CR etc.)

Classification, Description, Visibility, Domain, Priority: issue classification

Action taken: description of the action taken to resolve the issue

% completed: the percentage of tasks ready towards the issue

Approver: the required approver to check and close the issue

Est start: estimated start date of the issue

Est end: the estimated end date of the issue

An issue can be created against any PLM object (part, project, task, etc.). To submit an issue the following information is required:

Fields in red italics are required

Type

Classification Visibility Domain

Priority *Estimated Finish*

Description

Version	4.0	Date:	27-November-2017
Status	Released		26

- Classification
 - Risk – Probability of project damage needs planned mitigating actions
 - Issue – A problem that requires action or resolve
 - Decision – An agreed way, actionable way forward
 - Minutes – Status updates to issues and tasks
- Priority
 - Low
 - Medium
 - High
- Visibility: report filter
 - Internal - for MEM visibility
 - External – for customer / supplier visibility
- Domain:
 - Design
 - Quality
 - Manufacturing
 - Tooling+BI
 - Testing
 - Timing
 - Miscellaneous
 - Bought in Items
- Estimated finish: estimated finish date to close the issue
- Description: description of the issue

Toolbar icons:



Open the window page in another window



Clipboards are a collaborative tool, sort of repository, where the user can collect objects. This tool allows users to save objects into a collection. If some collections already exist, they are listed in the roll-down menu:

- add the selected objects to default clipboard
- add the selected objects to a user defined collections or/and create a new collections

Other icons are common to other toolbars (see Home toolbar)

Version	4.0	Date:	27-November-2017
Status	Released		27

Issues Details

Click on the name of the issue to open the issue information window

Main menu:

[ISS-0000172](#)

Name of the issue: name of the issue, link to summary of issue information

[Assignees](#)

Assignees: users assigned to the issue

[Reference Documents](#)

Reference documents: documents related to the task

[Reported Against](#)

Reported against: objects affected by the issue

[Routes](#)

Routes: Shows routes involving the issue and provides access to create a route

[Lifecycle](#)

Lifecycle: Allows users to view the state and lifecycle for the issue

[History](#)

History: Shows a log of all the actions that have occurred for the issue

Version	4.0	Date:	27-November-2017
Status	Released		28

Approval Tasks

In this tab are listed all the approval tasks that have to be approved by the user. Approval task are a particular kind of task: while the “tasks” are related to projects, the “approval tasks” are related to approval processes for PLM objects like documents, Change requests and project tasks.

Tasks Issues Approval Tasks Approval Issues Projects My Calendar Messages									
Name ▲			Title		Instructions	Due Date	Type	State	Context
<input type="checkbox"/> IT-0000802	<input checked="" type="checkbox"/>		Appr... Design Review P...		Approve Do...	05-Ma...	Appr...	Assig...	R-00002...
<input type="checkbox"/> IT-0000803	<input checked="" type="checkbox"/>		Appr... CAD Data receiv...		Approve Do...	05-Ma...	Appr...	Assig...	R-00002...
<input type="checkbox"/> IT-0000804	<input checked="" type="checkbox"/>		Appr... SFEMA Live doc...		Approve Do...	05-Ma...	Appr...	Assig...	R-00002...
<input type="checkbox"/> IT-0000805	<input checked="" type="checkbox"/>		Appr... SFEMA Live doc...		Approve Do...	05-Ma...	Appr...	Assig...	R-00002...
<input type="checkbox"/> IT-0000857	<input checked="" type="checkbox"/>		Appr... CR-0000248		Approve CN	12-Ju...	Appr...	Assig...	Route_R...
<input type="checkbox"/> IT-0000896	<input checked="" type="checkbox"/>		Appr... CR-0000202		Approve CN	03-Jul...	Appr...	Assig...	Route_R...
<input type="checkbox"/> IT-0000899	<input checked="" type="checkbox"/>		Appr... CR-0000265		Approve CN	06-Jul...	Appr...	Assig...	Route_R...
<input type="checkbox"/> IT-0000955	<input checked="" type="checkbox"/>		Appr... CR-0000276		Approve CN	08-Jul...	Appr...	Assig...	Route_R...

Columns:

In the Approval Task page, the following information is shown:

Name: name of the task (autoname generated by the system).



: this icon will open a side bar which can be used to provide approval/rejection and complete the task.



: represent the state of the issue: = delay, = approaching end date, = complete

Title: short description about approval task

Item Affected: PLM object affected by approval process

Instructions: instruction about approval process

Due Date: the estimated end date of approval

Type: Comment (used to provide information) or Approve (used to approve or reject the approval)

State: managed by PLM; Assigned means the approval task is assigned to a user



: number of object related to approval process

Version	4.0	Date:	27-November-2017
Status	Released		29

Toolbar icons:



 Complete the selected Task

 Reject the selected Task

 Mass approval open a window in which the user can select one or more projects and perform a mass promotion to complete of all the approval tasks.

 Open the window page in another window

 Clipboards are a collaborative tool, sort of repository, where the user can collect objects. This tool allows users to save objects into a collection. If some collections already exist, they are listed in the roll-down menu:

- add the selected objects to default clipboard
- add the selected objects to a user defined collections or/and create a new collections

Version	4.0	Date:	27-November-2017
Status	Released		30

Approval Issues

In this page are listed all the issues that have to be approved by the user.

Tasks Issues Approval Tasks Approval Issues Projects My Calendar Messages														
<input checked="" type="checkbox"/>	Name	Edi	Reported Against	Classification	Description	Visibility	Domain	Action Taken	Priority	% Complete	Approver	Finish	Start	
<input checked="" type="checkbox"/>	ISS-0000177		0	Test Export	Issue - A probl...	Check design	External	Design	02.15.2016;...	Low	100	Matthew Spiteri	Feb 29, 2016	Feb 15, 2016

Columns:

The Approval Issues page shows the same information described in the Issues page.

Toolbar icons:



Allows the user to approve and close the issue



Allows the user to reject the approval of the issue providing feedback to the issue champion to address the issue again



Open the window page in another window



Clipboards are a collaborative tool, sort of repository, where the user can collect objects. This tool allows users to save objects into a collection. If some collections already exist, they are listed in the roll-down menu:

- add the selected objects to default clipboard
- add the selected objects to a user defined collections or/and create a new collections

Version	4.0	Date:	27-November-2017
Status	Released		31

Projects

In the projects tab all the active projects are listed. The users that are members in a project have read / write access while in the projects that they are not a member of, they only have read access.

Project is a container of tasks, containing all the related information of a project (like schedule, issues, project folders, etc.).

Tasks Issues Approval Tasks Approval Issues Projects My Calendar Messages									
Projects Filter: In Work									
Name ▲	Current Phase	Project Type	Status	Owner	Collaborative S	Estimated Finish	Act		
<input type="checkbox"/> AM800 - Corporate Switches	Customer ...	Launch Ma...	Ready	Laur...		08-Oct-2020			
<input type="checkbox"/> AM800 - Seat Adjust Shadow Chrome	Customer ...	Launch Ma...	In Work	Laur...		25-Nov-2020			
<input type="checkbox"/> AM800 - Single Rockers	Customer ...	Launch Ma...	In Work	Laur...		25-Nov-2020			
<input type="checkbox"/> Amended Template - December 2018		Launch Ma...	Preliminary	Laur...		15-Dec-2020			
<input type="checkbox"/> AML AM601 Anodized Rotaries	Customer ...	Launch Ma...	In Work	Laur...		02-Mar-2020			
<input type="checkbox"/> AML AM800		Launch Ma...	Preliminary	Laur...		05-Feb-2020			
<input type="checkbox"/> AML Rapide	Customer ...	Launch Ma...	In Work	Laur...		04-Jun-2020			
<input type="checkbox"/> AML Wing Deploy		Change Ma...	Preliminary	Nich...		15-Mar-2018			

90 Objects | Page 1 of 4

Columns:

In the projects tab the following information is shown:

Name: project name



: represent the state of the project: = delay, = approaching end date, = complete

Current phase: current phase of the project

Project Type: Always Project Space (PLM terminology to define a project)

Status: lifecycle state (Create, Assign, Active, Review, Complete, Archive)

Owner: owner of the project

Collaborative Space:

Estimated finish date: the estimated end of the project

Act finish: end date of the project

Created Date: creation date of the project

Program: the program this project is linked to

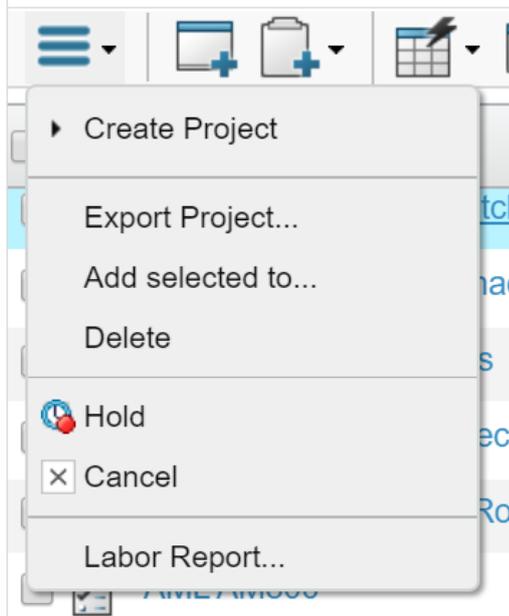
Description: description of the project

Version	4.0	Date:	27-November-2017
Status	Released		32

Toolbar icons:



Provides several commands related to projects



Create Project: create a new project (new **without** folders and tasks, copy from another existing project, import from a csv file properly configured, new from a template with folders and tasks)

Export Project: allows users to export project timing in a csv file

Delete: allows project owner to delete a project (only in state Create and if no deliverable exists)

Add selected to: if applicable, allows project to be added to other objects in PLM.

Hold, Resume, Cancel: allows project owner to hold a project or resume a project which was put on hold and cancel a project (means it is existing in PLM but not active)

Labor Report Option: allows user to create fiscal or calendar reports for a specific period. This function is available only for the responsible lead of the project.

Labor Report Options

Fields in red italics are required.

Report Year By: Fiscal

Reporting Year: 2016

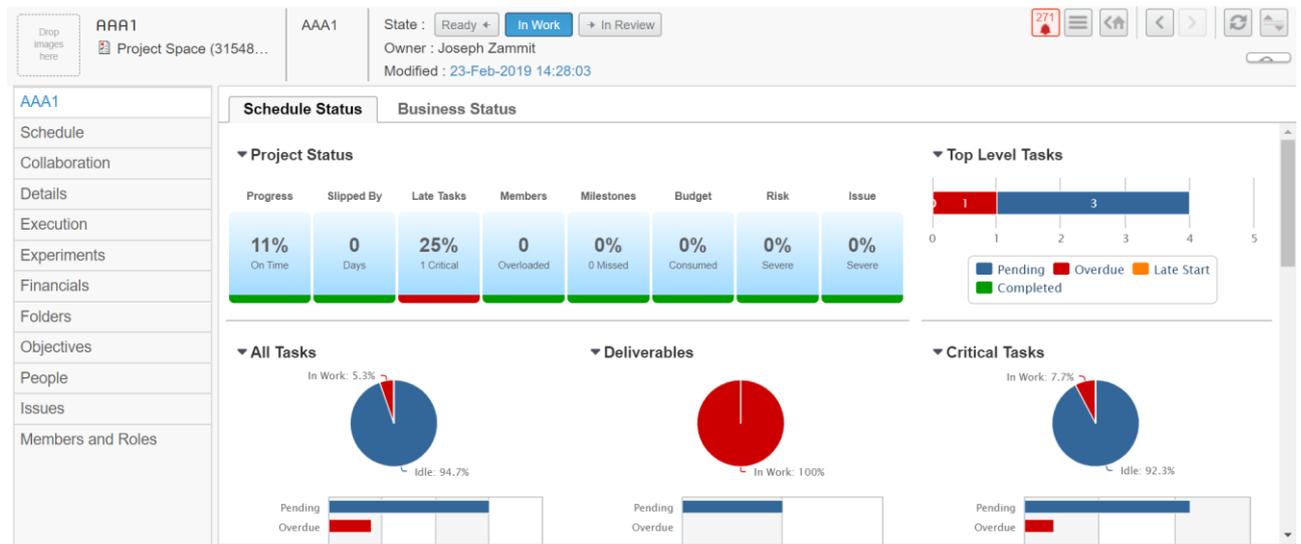
Default Time Interval: Monthly

Done Cancel

Version	4.0	Date:	27-November-2017
Status	Released		33

Project Details:

Click on the name of the project to open the project information window:



Main menu:

AAA1
Schedule
Collaboration
Details
Execution
Experiments
Financials
Folders
Objectives
People
Issues
Members and Roles

- **Project Name:** displays project status dashboard, Gantt Chart and Burn Down
- **Schedule:** project timing plan in a WBS
- **Details:** details of the project (properties, preferences, lifecycle, etc.)
- **Execution:** events that influence the project (issues, risks, routes, approvals, assessments, CO, Governed Items)
- **Experiments:** different versions of the project, used to perform what-if tests
- **Folders:** repository of project related documents collected in folders
- **People:** list of the project core team members and their roles within the project
- **Issues:** issues that afflict the project
- **Members and roles:** manage members and roles of the project

Note: some of the above menus may only be available to the project owner

Version	4.0	Date:	27-November-2017
Status	Released		34

My calendar

Show all the scheduled activities in a calendar view. This is not linked to the Methode Outlook calendar. There are 3 calendar visualization available:

- Daily
- Weekly
- Monthly

#	Name	Type	Start Date
1	Project Management	Task	5/1/2015 8:00:00 AM
2	Make-Buy decision - LM	Task	2/11/2016 8:00:00 AM

Toolbar icons:

Allows users to scroll the days

Show
Due Objects Allows users to filter the commitments

Date Submit Allows users to search for a specific day

Monthly

Weekly

Daily

#	Name	Type	Start Date
1	Project Management	Task	5/1/2015 8:00:00 AM
2	Make-Buy decision - LM	Task	2/11/2016 8:00:00 AM

Version	4.0	Date:	27-November-2017
Status	Released		35

Messages

This is the internal PLM mail service. Messages can be directly created and sent to other PLM users or messages notification can be received in specific situations (owner assignment, approval request, promotions of particular object, etc.)

Tasks Issues Approval Tasks Approval Issues Projects My Calendar **Messages**

Messages

Create Message Check Mail Delete Selected 

<input type="checkbox"/>		Subject		From	Received
<input type="checkbox"/>		Task Approval Notice		User Agent	Mar 23, 2016
<input type="checkbox"/>		Route Completion Notice		User Agent	Mar 23, 2016
<input type="checkbox"/>		Change Request approved		User Agent	Mar 23, 2016
<input type="checkbox"/>		The new Change Order has been assigned.		User Agent	Mar 23, 2016
<input type="checkbox"/>		The new Change Request has been assigned.		Matthew Spiteri	Mar 23, 2016
<input type="checkbox"/>		Change Request Cancelled Notification.		Jessica Camilleri	Mar 23, 2016
<input type="checkbox"/>		Route Completion Notice		User Agent	Mar 23, 2016
<input type="checkbox"/>		Task Reassignment Comments		Matthew Spiteri	Mar 23, 2016
<input type="checkbox"/>		Route Completion Notice		User Agent	Mar 23, 2016
<input type="checkbox"/>		The new Change Request has been assigned.		Matthew Spiteri	Mar 23, 2016
<input type="checkbox"/>		The new Change Request has been assigned.		Matthew Spiteri	Mar 18, 2016

Columns:

The Messages page shows the following information:



: the icon shows if message has been read or not

Subject: message subject, it's also a link to message content



: the icon is shown if the message has an attachment

From: message originator

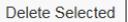
Received: date when message is sent

Toolbar icons:



 Create new message

 Update mail list

 Delete selected messages

Version	4.0	Date:	27-November-2017
Status	Released		36

Home RFQs User

Request for quotation tab is available to all users (users with roles Account or Quoting are the RFQs managers and they have read and write access, users without have a read-only access).

RFQ home page

Name	Description	Status	RFQ Type	Issue Date	Owner	Due Date	Customer Name	Customer Part #
RFQ-0000997-01	D7a Hazard Switch Revis...	RFQ...	Autom...	Jan 17, 2...	Sus...	Jan 2...	Jaguar Land ...	J8A2-11K656-AA
RFQ-0000996-01	AMPS request	Sale...	Servic...	Jan 16, 2...	Sus...	Jan 2...	Jaguar Land ...	LX73-7L074-AA...
RFQ-0000995-01	Volvo Trucks: USA - Igniti...	Con...	Autom...	Jan 15, 2...	Loui...	Feb 7,...	VOLVO TRU...	
RFQ-0000994-01	New Variants THUN	RFQ...	Sensor	Jan 14, 2...	Paul...	Jan 2...		
RFQ-0000993-01	Please Investigate the IP ...	RFQ...	Autom...	Jan 11, 2...	Sim...	Jan 1...	Jaguar Land ...	CPLA-14017-A...
RFQ-0000992-01	DNA Unlatched for spare ...	Upd...	Autom...	Jan 8, 20...	Giov...	Jan 1...	FCA	156148670 100...
RFQ-0000991-01	McLaren - Samples - Car...	RFQ...	Autom...	Jan 7, 20...	Ada...	Jan 8,...	MCLAREN	
RFQ-0000990-01	Kongsberg - Next Gen E...	Con...	Power	Jan 7, 20...	Ada...	Jan 1...	KONGSBERG	CU1000681181
RFQ-0000989-01	JLR require cost and timi...	Sale...	Autom...	Dec 20, ...	Sim...	Jan 4,...	Jaguar Land ...	J9C3-14B436-...
RFQ-0000988-01	ATL Brake switch modifie...	Con...	Autom...	Dec 20, ...	Giov...	Jan 11...	FERRARI	
RFQ-0000987-01	CVL Centre headrest up/...	Sale...	Autom...	Dec 20, ...	Sim...	Dec 2...	Jaquar Land ...	JLPA-14D340-...

637 objects

Columns:

In the home RFQ page the columns show the following information:

- **Name:** autaname RFQ number
- **Description:** description of RFQ
- **Status:** current RFQ lifecycle state
- **RFQ Type:** Automotive, Power, Sensor or Service Parts.
- **Issue date:** date the RFQ was generated (automatically recorded by the system)
- **Due date:** date by when the quote should be submitted (defined by the sales manager)
- **Customer name:** reference customer name
- **Custom part #:** reference customer number
- **Part description:** description of the part
- **Program lifetime:** as defined by the sales manager
- **Quote type:** Eng. Change, Market Test, New Product, P/N replaced/ revised or Volume Uplift.
- **Quote level:** Eng. Estimate, Final Quote or Preliminary Response.

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Status	Released		37

RFQ Details

Click on the name of the RFQ to open all the details

RFQ-000021-01	test new rfq	State : RFQ Opportunity	RFQ
Request for Quotatio...		Owner : kevinb	
		Modified : 2/17/2016 12:06:54 PM	

RFQ-000021-01			
Folders	Details		
Variants	Issue Date	Feb 17, 2016	Due Date
Sales Options			Feb 18, 2016
Estimated Volumes	Customer Name		Validity Days
Lifecycle			30
Members	Program/Platform #		Customer Documentation Reference
Activities Estimation	Customer Part #		Vehicle Model Year
Assignment View			Requested By
Tooling Cost Breakdown	Current Price	0.0 Dollar	Kevin Borg
Quotation Details	Quotation Currency	Euro	Part Description
Quotation Summary Matrix	Quote Type		
Commercial Options	Program Lifetime	0	Target Price
Program Release Form			0.0 Dollar
Routes			Market Price
Images			0.0 Dollar
Reports			Quotation Description
			test new rfq
			Quote Level
			Start of Production
			Delivery Terms

Main menu:

Folders
Variants
Sales Options
Estimated Volumes
Lifecycle
Members
Activities Estimation
Assignment View
Tooling Cost Breakdown
Quotation Details
Quotation Summary Matrix
Commercial Options
Program Release Form
Routes
Images
Reports

Folders: repository of generic documents collected in folders

Variants: show variants for the RFQ, allows to perform comparisons between different BOMs

Estimated volumes: estimated volumes for each variants, for production lifetime

Lifecycle: lifecycle of the RFQ

Members: show and manage the members involved in the RFQ

Activities estimation: list of estimation tasks

Summary matrix components: list of all components contained in all variants

Tooling cost breakdown: tools cost estimation

Routes: show and manage routes related to the item

Images: show and manage images related to the item

Reports: PDF reports of Program Release Form

NOTE: some of the above menus might only be available to the RFQ owner or RFQ assignees.

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Toolbar icons:



Create RFQ

Create a new RFQ

Create RFQ |

Fields in red italics are required

Type Request for Quotation

AutoName Series RFQ Number

Policy Request for Quotation

Brief Description

Business Unit

Visibility Company

Due Date

Default Task Constraint As Soon As Possible

Revise RFQ

Revise an existing RFQ



Open the window page in another window



Clipboards are a collaborative tool, sort of repository, where the user can collect objects.

This tool allows users to save objects into a collection. If some collections already exist, they are listed in the roll-down menu:

- add the selected objects to default clipboard
- add the selected objects to a user defined collections or/and create a new collections

Version	4.0	Date:	27-November-2017
Status	Released		39

Home Engineering User

This home page is available to users with roles Design Engineer (Product Design Engineer and Electrical Design Engineer).

The page has several tabs, containing information related to different type of parts and drawings:

The screenshot shows a software interface for managing parts. At the top, there is a navigation bar with several tabs: "My Parts", "Parts to Approve", "Dev to Prod Parts", "My CAD Drawings", "CAD Drawings to A...", and "Change References". Below the tabs, there is a toolbar with various icons for actions like "Create Parts", "Create Old Name", and other functions. Below the toolbar is a table with the following columns: "Name", "Phase", "Revision", "Description", "Owner", "Type", "Part Classification", and "Reject C". The table contains five rows of data:

Name	Phase	Revision	Description	Owner	Type	Part Classification	Reject C
206350	Production	01	COURTESY LIGHT SWIT...	Lara Dalli	Part	-	
553063	Production	04	EPB LHD FULL	Lara Dalli	Part	-	
556337	Production	05	MCLAREN HVAC DRIVER	Lara Dalli	Part	-	
56730	Production	02.A	BUTTON SET	Lara Dalli	Part	Moulded Parts	
MSCUSTN111BN01B	Production	00	test	Lara Dalli	Electrical P...	-	

- **My Parts:** Parts that belong user
- **Parts to Approve:** Parts that have to be approved by the user (available only if user has the right permission)
- **Dev to Prod Parts:** Published Development parts to be translated into Production parts by a senior design engineer (available only if user has the right permission)
- **My CAD Drawing:** CAD Drawing that belong user
- **CAD Drawings to Approve:** CAD Drawings that have to be approved by the user (available only if user has senior design engineer role)
- **CAD Drawings to Release:** CAD Drawings that have to be published by the user (available only if user has senior design engineer role)
- **Change Reference:** the list of the change reference used to collect drawing changes
- **Electronic components:** the list of the electronic parts
- **Packaging components:** the list of the packaging parts
- **Material parts:** the list of the material parts

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Status	Released		40

My Parts

In this tab are listed all the parts created by the user.

My Parts Filter:Preliminary								
Create Parts								
Name ▲	Phase	Revision	Description	Owner	Type	Part Classification	Reject Comment	
00059821	Production	00	PCBA - Digital B	Gilb...	Part	PCB Assemblies		
01.554005	Develop...	00.B.A	CD4 HAZARD	Gilb...	Part	-		
01.554006	Develop...	00.C.A	CD4 HAZARD	Gilb...	Part	-		
01.556458	Develop...	02.A	JLR EPB SWITCH	Gilb...	Part	-		
01.56795	Develop...	01.A	HOUSING	Gilb...	Part	Moulded Parts		
097028	Production	00	GREASE Rheolube 36...	Gilb...	Part	-		
10064261	Production	00	Rotary Blank Cap - DS	Gilb...	Part	-		

Columns:

In the **My Parts** tab the following information is shown:

- **Name:** name of the part - it's also a link to part details form
- **Phase:** EC part phase - Development or Production
- **Revision:** revision index of the part
- **Description:** description of the part
- **Owner:** current owner of the part
- **Type:** object type
- **Part classification:** part classification defined by part owner
- **Reject comment:** reject comment if available
- : clicking on this icon will open the corresponding item in a new window.

Toolbar icons:



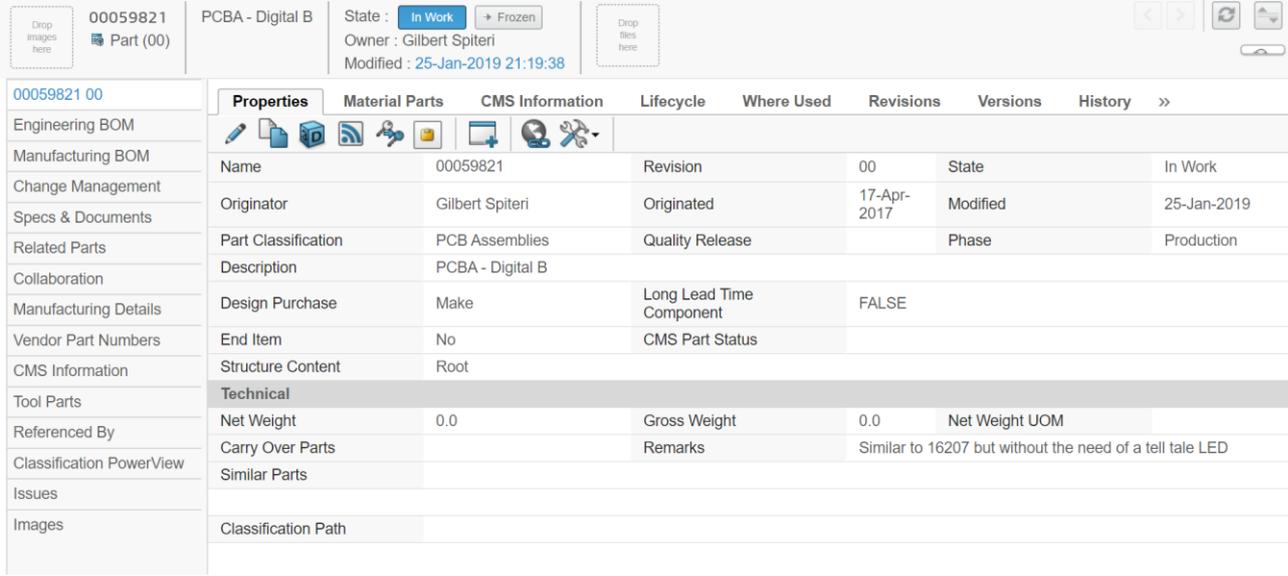
Allow to create a new part

Allow promote or demote operations on one or multiple selected parts

Version	4.0	Date:	27-November-2017
Status	Released		41

Part Details

Click on the name of the part to view all the details on the main window or use  icon to open the part details in a new window.



Properties	Material Parts	CMS Information	Lifecycle	Where Used	Revisions	Versions	History
Name	00059821	Revision	00	State	In Work		
Originator	Gilbert Spiteri	Originated	17-Apr-2017	Modified	25-Jan-2019		
Part Classification	PCB Assemblies	Quality Release		Phase	Production		
Description	PCBA - Digital B						
Design Purchase	Make	Long Lead Time Component	FALSE				
End Item	No	CMS Part Status					
Structure Content	Root						
Technical							
Net Weight	0.0	Gross Weight	0.0	Net Weight UOM			
Carry Over Parts		Remarks	Similar to 16207 but without the need of a tell tale LED				
Similar Parts							
Classification Path							

An Enovia Part is an object that contains all the information and documents related to a company Part Number.

Main menu:

The following list contains all command available for a part; command access depends on user role and permission

00059821 00
Engineering BOM
Manufacturing BOM
Change Management
Specs & Documents
Related Parts
Collaboration
Manufacturing Details
Vendor Part Numbers
CMS Information
Tool Parts
Referenced By
Classification PowerView
Issues
Images

- **Name:** part name, link to the page with summary of part attributes
- **Engineering BOM:** using this tab is possible to browse the EBOM structure using the following tabs
 - BOM
 - Where Used
 - Markups
- **Manufacturing BOM:** using this tab is possible to browse the MBOM structure using the following tabs
 - MBOM plant specific
 - Plant preferences
 - Routing
 - Where used
 - Markups
- **Change Management:** the tab contains information related to Change requested on part
 - Change Order
 - MECOs (only if applicable)
 - Change Request
 - Change Legacy
- **Specs & Documents:** the tab contains information related to Drawings and Documents related to part
 - Specifications
 - Reference documents

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- **Related Parts:**
 - Alternate Parts
 - Substitute Parts
 - Spare Parts
- **Collaboration:** list of decisions, discussions, meetings, routes of the item
 - Review
 - Route
 - Issues
 - Subscribe
 - Tasks/Signatures
 - Approvals
- **Manufacturing Details:** the table shows information related to plant where the part is used (Malta and Egypt)
- **Vendor Part Numbers:** displays vendor part numbers set for the part by the user (if available)
- **CMS Information:** displays CMS information and commands
- **Tool Parts:** displays any tool parts connected to the part BOM
- **Referenced by:** displays all PLM objects linked to the part
- **Classification Power View:** shows part classification and allows user to classify part in technical library
- **Issues:** displays list of issues raised against this parts
- **Images:** any images connected to the part are shown here.

Version	4.0	Date:	27-November-2017
Status	Released		43

Parts to Approve

In this tab are listed all the parts that require approval by a user with Senior Design Engineer role

Name ▲	Phase	Revision	Description	Owner	Type	Part Classification	Reject Comment
00000483	Development	A	SMD Res 0805 5% - G...	Chri...	Re...	Electronic Components	
00000512	Development	A	SMD Cap 0805 50V 10...	Chri...	Ca...	Electronic Components	
00000522	Development	A	SMD Diode SOT23 - B...	Chri...	El...	Electronic Components	
00000562	Development	A	SMD NPN RET - PDTD...	Chri...	Tr...	Electronic Components	
00000572	Development	A	SMD PNP RET DUAL - ...	Chri...	Tr...	Electronic Components	
00001510	Development	A	Packed 54743	Sa...	Part	-	
00001520	Development	A	Carton Box + Renault L...	Mar...	Ot...	Packaging Material	
00001530	Development	A	Carton box+ Renault logo	Mar...	Part	Packaging Material	
00002251	Production	01	E Shifter - Speed Contr...	Sul...	Part	-	

Columns:

In **Parts to Approve** tab the following information is shown:

- **Name:** name of the part - it's also a link to part details form
- **Phase:** EC part phase - Development or Production
- **Revision:** revision index of the part
- **Description:** description of the part
- **Owner:** current owner of the part
- **Type:** object type
- **Part classification:** part classification defined by part owner
- **Reject comment:** reject comment if available
- : clicking on this icon will open the corresponding item in a new window.

Version	4.0	Date:	27-November-2017
Status	Released		44

Development to Production parts

In this tab are listed all the Development parts that can be translated to Production parts by a user with Senior Design Engineer role.

My Parts	Parts to Approve	Dev to Prod Parts	My CAD Drawings	CAD Drawings to A...	Change References	>>	
Name ▲	Phase	Revision	Description	Owner	Type	Part Classification	Reject Comment
 00000136	Development	B		Mat...	Part	-	
 00000631	Development	A	Packed 57293	Sa...	Part	Miscellaneous	
 00001500	Development	A	Level Sensor	Sa...	Part	-	
 00002360	Development	A		Dan...	Part	-	
 00002390	Development	A	Housing	Eva...	Part	Moulded Parts	
 00002406	Development	A	Bezel	Eva...	Part	Moulded Parts	
 00002416	Development	A	Slider	Eva...	Part	Moulded Parts	
 00002426	Development	A	Button Cap	Eva...	Part	Moulded Parts	

Columns:

In **Dev to Prod Parts** tab the following information is shown:

- **Name:** name of the part - it's also a link to part details form
- **Phase:** EC part phase - Development or Production
- **Revision:** revision index of the part
- **Description:** description of the part
- **Owner:** current owner of the part
- **Type:** object type
- **Part classification:** part classification defined by part owner
- **Reject comment:** reject comment if available
-  : clicking on this icon will open the corresponding item in a new window.

Version	4.0	Date:	27-November-2017
Status	Released		45

My CAD Drawings

In this tab are listed all the CAD drawings that are owned by the user.

My CAD Drawings Filter:Preliminary									
Name	Revisor	Description	Owner	Drawing For	Supporti	Supporti	Reject Co	State	
206295-C	00A	92231413	Gilbert ...	MEM Cu...	-			Prel...	
206420-C	00A	J00166540A, B45566540	Gilbert ...	MEM Cu...	-			Prel...	
327600-H-C	00A	D69T-11572-BA, YUQ50...	Gilbert ...	MEM Cu...	-			Prel...	

Columns:

In the **My CAD Drawings** tab the following information is shown:

Name: Drawing Number, it's also a link to drawing details form

Revision: Drawing revision

Description: Drawing description

Owner: PLM user who owns the drawing container (usually this is the creator of the drawing)

Drawing Format, Supporting type, Supporting Document Number: Drawing classification information

Reject Comment: In case of drawing approval rejected, the column shows the reject comment; in this tab is always empty

State: Drawing state, in this case always PRELIMINARY

: Shortcut to open a pop-up window containing links to view and download the attached files

: Opens the drawing container in a new window

Toolbar icons:

Allow promote or demote operations on the selected drawings

Version	4.0	Date:	27-November-2017
Status	Released		46

CAD Drawing Details

Click on the name of the CAD Drawing to view all the details on the main window or use  icon to open the part details in a new window

00000641-R Ski Hatch Switch State : Preliminary Review Approved

00000641-A Owner : Christian (ENG) Ciantar

CAD Drawing (00A) Modified : 09-Jun-2017 09:45:08 GLOBAL

Files	Type	CAD Drawing
Route	Title	00000641-A
Lifecycle	Responsible	Christian (ENG) Ciantar
Related Parts	Design Responsibility	METHODE ELECTRONICS
Revisions	Originated	24-Apr-2017
History	Modified	09-Jun-2017
Multiple Ownership Access	Description	Ski Hatch Switch
	Drawing Format	MEM Assembly Drawing
	Notes	
	Sub Code	
	Sub Type	
	Supporting Document Number	
	Supporting Type	-
	Tooling Number 1	
	Tooling Number 2	

File Name	Ver	Originated	Comments	Originator	Format	File Size	Actions
00000641-00A.pdf	1	24-Apr-20...		Christian (...)	generic	464.03 KB	 

To view the drawing file the user can click on the  icon in the lower section of the page or from the Files menu.

To download the drawing file the user can click on the  icon in the lower section of the page or from the Files menu.

Version	4.0	Date:	27-November-2017
Status	Released		47

CAD Drawings to Approve

In this tab are listed all the CAD drawing that require approval by a user with Senior Design Engineer role

<input type="checkbox"/>	Name	Revisor	Description	Owner	Drawing Format	Supporting Type	Supporting Document N
<input type="checkbox"/>	 00000641-A	00A	Ski Hatch Switch	Christia...	MEM Assembl...	-	
<input type="checkbox"/>	 00000886-A	00A	Assembly Drawing	Marie Cl...	MEM Assembl...	-	
<input type="checkbox"/>	 00000886-C	00A	Customer Drawing	Marie Cl...	MEM Custom...	-	
<input type="checkbox"/>	 00001045	00A		Marie Cl...	MEM Compon...	N/A	
<input type="checkbox"/>	 00001055	00A	Conductor 102	Marie Cl...	MEM Compon...	-	
<input type="checkbox"/>	 00001065	00A	Conductor 103	Marie Cl...	MEM Compon...	-	
<input type="checkbox"/>	 00001075	00A	Insulation 201	Marie Cl...	MEM Compon...	-	

Columns:

In the **CAD Drawing to Approve** tab the following information is shown:

Name: Drawing Number, it's also a link to drawing details form

Revision: Drawing revision

Description: Drawing description

Drawing Format, Supporting type, Supporting Document Number: Drawing classification

Reject Comment: In case of drawing approval rejected, the column shows the reject comment; in this tab is always empty

State: Drawing state, in this case always REVIEW



: Shortcut to open a pop-up window containing links to view and download the attached files



: Opens the drawing container in a new window

Version	4.0	Date:	27-November-2017
Status	Released		48

CAD Drawings to Release

In this tab are listed all the CAD drawing that need to be published by a user with Senior Design Engineer role

Name	Revisor	Description	Owner	Drawing Format	Supporting	Supporting Do	Reject Comm
 10094741-C	01B	Customer-thun-128K	Adam D...	MEM Custom...	Change ...		
 10094761-A	01C	Asm-thun_128k	Adam D...	MEM Assembl...	Change ...		
 44192	07J	PTO MAIN PCB Bareboard	Toni Tan...	MEM Compon...	Change ...		
 10102876	00A		Ryan M...	MEM Compon...	-		
 00005724	00C	Polini Magnetized Shaft	Serge C...	MEM Compon...	-		
 10062050-A	00B		Serge C...	MEM Assembl...	-		
 10097032	00A		Ryan M...	MEM Compon...	-		
 10096331	00A		Ryan M...	MEM Compon...	-		
 57193	05H	CRef-0000804 issued in ...	Jean Pa...	MEM Compon...	Change ...	 CRef-0000804	

Columns:

In the **CAD Drawing to Release** tab the following information is shown:

Name: Drawing Number, it's also a link to drawing details form

Revision: Drawing revision

Description: Drawing description

Drawing Format, Supporting type, Supporting Document Number: Drawing classification

Reject Comment: In case of drawing approval rejected, the column shows the reject comment; in this tab is always empty

State: Drawing state, in this case always APPROVED



: Shortcut to open a pop-up window containing links to view and download the attached files



: Opens the drawing container in a new window

Version	4.0	Date:	27-November-2017
Status	Released		49

Change References

In this tab is listed the list of all Change References created by all users.

Name	Owner	Description	State
CRef-0000003	william.camilleri		Create
CRef-0000005	Mark A. Muscat		Create
CRef-0000010	Sean Padley		Create
CRef-0000012	Matthew Spiteri		Create
CRef-0000036	Sean Padley	Added detail view to socket drawing	Create
CRef-0000037	Christian (ENG) Cianciar	Typo in drawing, dimension 2.6Å±0...	Create
CRef-0000044	Thomas Sciberras	Error in Part Number.	Create
CRef-0000054	Sean Padley		Create

Columns:

The **Change References** tab shows the following information:

Name: CRef Number, it's also a link to CRef details form



: Opens the CRef details in a new window

Owner: user who owns the CRef

Description: CRef description

State: CRef state

Toolbar icons:



Allows users to create a new CRef; command is available only to users with role Product Design Engineer.

Version	4.0	Date:	27-November-2017
Status	Released		50

Electronic components

In this tab is listed the library of all electronic components

My Parts Parts to Approve Dev to Prod Parts My CAD Drawings CAD Drawings to R... Electronic Compon... >>									
Electronic Components Filter:Default, Methode Component									
<input type="checkbox"/> Name ▲	Revisor	Status	Owner	Originated	PLM State	Component Type	Package	Value /Micro Arch. + no of pins	
<input type="checkbox"/> APCUSTN008STX0R	00	TO BE DISC...	Toni ...	14-Dec-2...	Publish	OpAmps	Cust...	Pins	
<input type="checkbox"/> APS0TXN005MPX0R	00	OK TO USE	Gius...	01-Mar-2...	Publish	OpAmps	SOTx	Pins	
<input type="checkbox"/> APS0TXN005TIX0R	00	OK TO USE	Jose...	11-Mar-2...	Publish	OpAmps	SOTx	Pins	
<input type="checkbox"/> APXXS0N008ADX0R	00	OK TO USE	Jose...	11-Mar-2...	Publish	OpAmps	SOxx	Pins	
<input type="checkbox"/> APXXS0N008STX0R	00	OK TO USE	Jose...	11-Mar-2...	Publish	OpAmps	SOxx	Pins	
<input type="checkbox"/> APXXS0N008STX1R	00	OK TO USE	Jose...	11-Mar-2...	Publish	OpAmps	SOxx	Pins	
<input type="checkbox"/> APXXS0N008STX2R	00	OK TO USE	Gius...	02-Dec-2...	Publish	OpAmps	SOxx	Pins	
<input type="checkbox"/> ASTS0PN014MXX0R	00	OK TO USE	Jose...	11-Mar-2...	Publish	ASIC	TSS...	Pins	

Columns:

In the **Electronic Components** tab the following information is shown:

Name: Part Number, it's also a link to part details form

Revision: Part revision

Description: Part description

Owner: Part originator

State: Part state

Component Type, Package, etc.: part classification

Toolbar icons:



Allows users to create a new Electronic component; command is available only to users with role Electronic Design Engineer.



Allows users to delete the selected item, depending on the item's state and user permission.

Version	4.0	Date:	27-November-2017
Status	Released		51

Packaging Components

In this tab is listed the library of all packaging components

Name ▲	Revision	Description	State	Dimension	Net Weight UoM	Weight	Part Weight
  00000255	A	Car Box+Lid	In Work	653x442x7...		0.0	
  00000265	A	Carton Pad B&C Flute	In Work	580 x 426 ...		0.165	
  00000275	A	Carton Pad	In Work	440x79x7...		0.025	
  00000285	A	Carton Pad	In Work	440x79x7...		0.035	
  00000314	A	Carton Pad	In Work			0.0	
  00001540	00	Carton Die-cut Tray Size ...	Publish		PCS	0.0	
  00001686	00	Carton Strip	Publish			0.0	
  00001686	A	Carton Strip	Obsolete			0.0	
  00002261	00	Blister Tray	Publish	538x358x65		0.0	

Columns:

In the **Packaging Components** tab the following information is shown:

Name: Part Number, it's also a link to part details form

Revision: Part revision

Description: Part description

State: Part state

Dimension. Net Weight UOM, etc.: Part classification



: Opens the packaging part details in a new window

Toolbar icons:



Allows users to create a new Packaging component; command is available only to users with role Product Design Engineer.

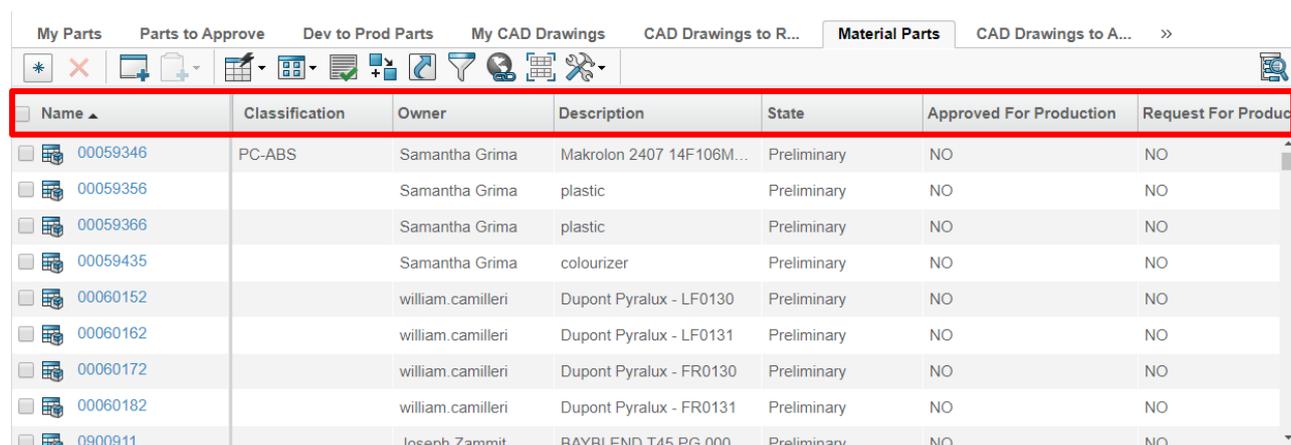


Allows users to delete the selected item, depending on the item's state and user permission.

Version	4.0	Date:	27-November-2017
Status	Released		52

Material Parts

In this tab is listed all the library of raw materials.



Name	Classification	Owner	Description	State	Approved For Production	Request For Production
00059346	PC-ABS	Samantha Grima	Makrolon 2407 14F106M...	Preliminary	NO	NO
00059356		Samantha Grima	plastic	Preliminary	NO	NO
00059366		Samantha Grima	plastic	Preliminary	NO	NO
00059435		Samantha Grima	colourizer	Preliminary	NO	NO
00060152		william.camilleri	Dupont Pyralux - LF0130	Preliminary	NO	NO
00060162		william.camilleri	Dupont Pyralux - LF0131	Preliminary	NO	NO
00060172		william.camilleri	Dupont Pyralux - FR0130	Preliminary	NO	NO
00060182		william.camilleri	Dupont Pyralux - FR0131	Preliminary	NO	NO
0900911		.Inseph Zammit	RAYRI FND T45 PG 000	Preliminary	NO	NO

Columns:

The **Material Parts** tab shows the following information:

Name: Part Number, it's also a link to part details form

Description: Part description

State: Part state

Approved For Production: Specifies if part is approved for production or only for prototype

Request For Production: Specifies if there is a request to approve for production the material part



: Opens the packaging part details in a new window

Toolbar icons:



Allows users to create a new Material Part; command is available only to users with role Product Design Engineer.



Allows users to delete the selected item, depending on the item's state and user permission.

Version	4.0	Date:	27-November-2017
Status	Released		53

Home Manufacturing User

This home page is available only to MBOM Engineers.

The screenshot shows the Home Manufacturing User interface. On the left is a navigation menu with options like 'Collaboration and Approvals', 'Home', 'Home RFQ User', 'Home Project Lead', 'Home Engineering User', 'Home Change Management User', 'Home Manufacturing User' (selected), 'Requirements', 'Summary Page', 'Issues Summary', 'Shortcuts...', 'Collections', 'Utilities', and 'Routes'. The main content area has a tabbed interface with 'Parts to Publish' selected and highlighted in red. Other tabs include 'Parts to Complete', 'MML Parts to Comp...', 'PURCH Parts to Co...', 'MCOs', and 'Manufacturing Par...'. Below the tabs is a table with columns: Name, Change Action, Classification, Revision, Description, and Manufacturing Responsibility. The table lists several parts with their respective details.

Name	Change Action	Classification	Revision	Description	Manufacturing Responsibility
00019463	CA-0046056 (2/3)	Component	01	U-Flag	Malta
00050422	CA-0048239 (16/16)	Product	02	ARS-2WD-Front	Malta
00050432	CA-0048239 (16/16)	Product	02	ARS-Rear	Malta
00050442	CA-0048239 (16/16)	Product	02	ARS-4WD-Front	Malta
00054676		Component	01	BareBoard - Main PCBA	Egypt
00055674		PCB	01	BareBoard	Egypt
00056936		PCB	01	BareBoard	Malta, Egypt
00056966		PCB	01	BareBoard	Malta, Egypt
00058972			00	LSR Seal	
00059121		Component	01	BUTTON	Malta

The Home Manufacturing User menu contains the following tabs:

- Parts to Publish
- Parts to Complete
- MCOs
- Manufacturing Parts
- MML Parts to complete
- PURCH Parts to complete
- MCOs Table

NOTE: The visibility of the above tabs changes depending on the user's role therefore not all users will see all the above mentioned tabs.

Version	4.0	Date:	27-November-2017
Status	Released		54

Parts to Publish

In this tab are listed all the Parts approved by engineering that are missing the definition of the manufacturing plant to be released. The list contains also all the Parts revised by engineering but not yet published, even if the manufacturing plant is already defined.

Name ▲	Change Action	Classification	Revision	Description	Manufacturing Responsibility
 00019463	 CA-0046056 (2/3)	Component	01	U-Flag	Malta
 00050422	 CA-0048239 (16/16)	Product	02	ARS-2WD-Front	Malta
 00050432	 CA-0048239 (16/16)	Product	02	ARS-Rear	Malta
 00050442	 CA-0048239 (16/16)	Product	02	ARS-4WD-Front	Malta
 00054676		Component	01	BareBoard - Main PCBA	Egypt
 00055674		PCB	01	BareBoard	Egypt
 00056936		PCB	01	BareBoard	Malta, Egypt

Columns:

The **Parts to Publish** page shows the following information:

Name: Part Number, it's also a link to part details form



: Opens the part details in a new window

Change Action: displays change action linked to the part if it exists

Classification: part classification, used to identify Finished Products, Switches and Packaging Assemblies

Revision: part revision

Description: part description

Manufacturing Responsibility: identify for which plants the part is used or produced

Version	4.0	Date:	27-November-2017
Status	Released		55

Parts to Complete

In this tab are listed all the released parts by MBOM Engineers that have to be completed, before pushing into CMS systems.

MBOM Engineers have to complete mandatory information for CMS, complete the routing definition and update or complete the MBOM.

Parts to Publish													Parts to Complete	MML Parts to Comp...	PURCH Parts to Co...	MCOs	Manufacturing Par...	MCOs Table							
Complete Select...																									
Name	Classification	Revision	Description	DesignPurchase	Production Make Buy Code	End Item	Item Master	Item Master	Routing	Routing BOM	BC														
00000070	Component	02	Socket	Make	Egypt:Unassigned, Malta:Make	Yes		ITEM MASTER		BOM & ROUTE															
00000080	Component	01.B	Housing	Make	Egypt:Unassigned, Malta:Make	No		ITEM MASTER		BOM & ROUTE															
00000106	PCB	01	PCBA	Buy	Egypt:Unassigned, Malta:Buy	No		ITEM MASTER		BOM & ROUTE															

Columns:

The **Parts to Complete** page shows the following information:

Name: Part Number, it's also a link to part details form



: Opens the part details in a new window

Classification: part classification, used to identify Finished Products, Switches and Packaging Assemblies

Revision: part revision

Description: part description

Design Purchase: shows whether part is set to be manufactured in house or purchased

Production Make Buy Code: shows whether part is set to be manufactured in house or purchased for each assigned plant.

End Item: shows part end item setting (Yes/No).

All remaining columns provide a link to update part information or show if information has been completed. For Example:

Item Master (column 1): if item master data has been populated the column will show as "complete" otherwise it will be blank.

Item Master (column 2): link to update item master data

Toolbar icons:



Allows users to declare that part details, routing and Bill of Material have been completed and pushed to CMS. This will clean up the selected parts from the Parts to Complete tab.

Version	4.0	Date:	27-November-2017
Status	Released		56

MML Parts to Complete

In this tab are listed all the released parts by MBOM Engineers that have to be completed with MML information, before pushing into CMS systems.

This tab is visible only to users with MML role who have to complete the MML information and push to CMS.

Columns:

The **MML Parts to Complete** page shows the same information as Parts to Complete, but only allows management of the MML information.

Toolbar icons:

A rectangular button with a thin border and the text "Complete Select..." inside.

Allows users to declare that part details, routing and Bill of Material have been completed and pushed to CMS. This will clean up the selected parts from the Parts to Complete tab.

PURCH Parts to Complete

In this tab are listed all the released parts by MBOM Engineers that have to be completed with Purchasing information, before pushing into CMS systems.

This tab is visible only to users with PURCH role who have to complete the MML information and push to CMS.

Columns:

The **PURCH Parts to Complete** page shows the same information as Parts to Complete, but only allows management of the Purchasing information.

Toolbar icons:

A rectangular button with a thin border and the text "Complete Select..." inside.

Allows users to declare that part details, routing and Bill of Material have been completed and pushed to CMS. This will clean up the selected parts from the Parts to Complete tab.

Version	4.0	Date:	27-November-2017
Status	Released		57

Manufacturing Parts to Complete

These are managed only by MBOM Engineers and are used to manage intermediate parts during manufacturing process study. These parts can be used on MBOM.

Parts to Release		Parts to Complete		MCOs		Manufacturing Par...		
Name	Classification	Rev	Description	Type	Complete	Item Master	Routing	BOM
<input type="checkbox"/> 000000562		00	housing	Manufacturing Part				
<input type="checkbox"/> 000000645		00	Painting 00000017	Manufacturing Part				

Columns:

The **Manufacturing Parts to Complete** page shows the same information described in **Parts to Publish** page.

Toolbar icons:

Allows users to declare that part details, routing and Bill of Material have been completed and pushed to CMS

Manufacturing Parts Details

Click on the name to view all the details on the main window or use icon to open part details on a new window.

00004521
Manufacturing Part (00)

AML Matt Black Paint

State : Publish + Obsolete

Owner : Corporate

Modified : 26-Jan-2019 02:43:58

00004521 00
Properties Material Parts CMS Information Lifecycle Where Used History Images >>

Name	00004521	Revision	00	State	Publish
Originator	Samantha Grima	Originated	20-Jul-2016	Modified	26-Jan-2019
Part Classification	-	Quality Release			
Description	AML Matt Black Paint				
Design Purchase	Make	Long Lead Time Component	FALSE		
End Item	No	CMS Part Status	Malta: Confirmed (GL Expense Code: E01 - PAINT LINE CONSUMABLES)		
Structure Content	Stand Alone				
Options					
Design Controlled					
Configured	False				

Version	4.0	Date:	27-November-2017
Status	Released		58

Main menu:

The following list contains all command available for a part; command access depends on user role and permission

Part number: shows several tabs containing part information.

Manufacturing BOM: using this tab is possible to browse the BOM structure. It's divided in:

- MBOM Plant Specific
- Routing
- MBOM revisions
- Where Used
- Markups

Change Management: the tab contains information related to Change requested on part

- MCO
- MECOs

Specs & Documents: the tab contains information related to Drawings and Documents related to part

- Specifications
- Reference Documents

Collaboration

- Route
- Discussions
- Issues
- Subscribe

Manufacturing Details: the table shows information related to plant where the part is used (Malta and Egypt)

Vendor Part Numbers: displays vendor part numbers set for the part by the user (if available)

CMS Information: displays CMS information and commands

Tool Parts: displays any tool parts connected to the part BOM

Referenced by: displays all PLM objects linked to the part

Classification Power View: shows part classification and allows user to classify part in technical library

Issues: displays list of issues raised against this parts

Related Change Notices: lists any change notices which the part is related to

Images: any images connected to the part are shown here.

00004521 00
Manufacturing BOM
Change Management
Specs & Documents
Collaboration
Manufacturing Details
Vendor Part Numbers
CMS Information
Tool Parts
Referenced By
Classification PowerView
Issues
Related Change Notices
Images

Version	4.0	Date:	27-November-2017
Status	Released		59

MCOs

In this tab are listed all the MCOs. The Manufacturing Change Orders are created every time a MBOM is created or when a change to an MBOM is required.

Name	Start Date	Man Resp	Proposed Changes	Involved MBOMs	State	Description	Owner	Originated
MCO-0029122	Dec 16, 201...	Malta	00057766 00055991		Create		Samantha ...	15-Jan-
MCO-0029123	Dec 16, 201...	Malta	00057766	00057766	Create		Samantha ...	15-Jan-
MCO-0033576	Nov 6, 2017...	Egypt			Create		Samantha ...	05-Nov-
MCO-0033617	Dec 31, 204...	Egypt	52392	456018	Create		Samantha ...	14-Nov-

Columns:

The **MCOs** page shows the following information:

Name: MCO number, it's also a link to MCO details form



: Opens the part details in a new window

Start Date: start effectivity date, when affected parts will be available in production

Manufacturing Responsibility: identify for which plants the MCO is related

Affected Items: parts affected by Manufacturing Change

Involved MBOMs: Bill of Material affected by Change

State: MCO state (Create, Review, Released, Implemented)

Description: Manufacturing Change description

Owner: user who create the Manufacturing Change

Originated: date when Manufacturing Change was created

Version	4.0	Date:	27-November-2017
Status	Released		60

MCO Details

Click on the name to view all the details on the main window or use  icon to open part details on a new window.

Drop images here	MCO-0000256 MCO	State : Create Review
		Owner : Test Everything
		Modified : 2/14/2016 4:45:30 PM
MCO-0000256	   	
History	Type	MCO
Lifecycle	Name	MCO-0000256
Affected Part Revisions	Description	
Route	Policy	MCO Standard
MCO Impact Report	Start Date	Feb 15, 2016 12:00:00 AM CET
Related MCOs	Target Start Date	Feb 15, 2016
Related Change	Originator	Test Everything
Involved MBOMs	Manufacturing Responsibility	Malta

MCO menus:

- **History:** object transaction history
- **Lifecycle:** lifecycle state
- **Affected part revisions:** list of items that will be released with current MCO
- **Route:** show and manage routes related to the item
- **MCO impact report:** shows all changes implemented that will be released with current MCO
- **Related MCOs:** shows if there are other MCOs pre-requisite on current MCO
- **Related change:** ECO, MECO, DCR, CA related with the current MCO
- **Involved MBOMs:** MBOM involved in the current MCO

Toolbar icons:



Edit the MCO, in order to update Start Date



Copy MCO, in order to create another MCO with same changes in another plant



Add to clipboard, used to add MCO number (used in MBOM Management process)

A user with MBOM license and roles will also have the following additional functions in the toolbar:

[Complete Info N...](#)

Complete info No to CN – Fills CN with default info (Create CN field is set to NO)

[Go To Implement...](#)

Go to implemented – promotes MCO 3 times up to Implemented state.

Version	4.0	Date:	27-November-2017
Status	Released		61

MCOs Table

In this tab are listed all the MCOs. The Manufacturing Change Orders are created every time a MBOM is created or when a change to an MBOM is required.

Parts to Publish										Parts to Complete										MCOs										Manufacturing Par...										MCOs Table									
Name	Start Date	Man Resp	Proposed Changes	Involved MBOMs	State	Description	Owner	Originated																																									
MCO-0029122	Feb 27, 2019 12:00:00 AM CET	Malta	00057766 00055991		Create		Samantha Grima	15-Jan-2017																																									
MCO-0029123	Dec 16, 2018 12:00:00 AM CET	Malta	00057766	00057766	Create		Samantha Grima	15-Jan-2017																																									
MCO-0033576	Nov 6, 2017 7:02:13 PM EET	Egypt			Create		Samantha Grima	05-Nov-2017																																									
MCO-0033617	Dec 31, 2049 1:00:00 AM FET	Egypt	52392	456018	Create		Samantha Grima	14-Nov-2017																																									

Columns:

The **MCOs** page shows the following information:

Name: MCO number, it's also a link to MCO details form



: Opens the part details in a new window

Start Date: start effectivity date, when affected parts will be available in production

Manufacturing Responsibility: identify for which plants the MCO is related

Affected Items: parts affected by Manufacturing Change

Involved MBOMs: Bill of Material affected by Change

State: MCO state (Create, Review, Released, Implemented)

Description: Manufacturing Change description

Owner: user who create the Manufacturing Change

Originated: date when Manufacturing Change was created

Version	4.0	Date:	27-November-2017
Status	Released		62

Home Change Management User

This home page is available for all users: users with Change Coordinator or Launch Manager roles are the Change managers (RFQs managers) and have write and read access, all other roles have a read-only access.

For every change, a Change Request (CR) is required. Once the parts are added to the CR, a new Change Action (CA) is created and connected to the parts involved in the CR. The parts involved in the CR can be moved to a different CA (new or existing) or can be splitted in several CAs. Once the CR is "In process CO" state then the Change Order (CO) is created and the CA is automatically connected to it. To complete the change process, the promotion of the CA to Complete state is required. Once the CA is promoted to complete, the CO is promote to complete as well.

Change Notices are created when a change is released by MBOM Engineers; they can be updated by Change Coordinator and can be closed in CMS.

The screenshot shows the 'Home Change Management User' interface. At the top, there are four tabs: 'Change Requests', 'Change Orders', 'Change Actions', and 'CMS Change Notice...'. The 'Change Requests' tab is highlighted with a red border. Below the tabs, there is a search bar and a toolbar with various icons. The main area displays a table of Change Requests (CRs) with the following columns: Name, Idle Days, Estimated Completion, State, and Description. The table contains five rows of data:

Name	Idle Days	Estimated Completion	State	Description
CR-0000395	6	28-Feb-2019	In Review	test
CR-0000394	20	28-Feb-2019	In Review	TEST for rejected change
CR-0000393	22		Create	test
CR-0000391	39	25-Jan-2019	Create	Increase 00022556-Retention-spring wire thickness and change shape to increase the pull out force of F Shifter Knob

- Change Request
- Change Orders
- Change Actions
- CMS Change Notices

Change Process Flow Chart

Click the below link to open a detailed illustration of the Methode CR process flow and relevant details.



Methode CR Process
Flow in PLM_ Version

Version	4.0	Date:	27-November-2017
Status	Released		63

Change Request

All active CRs are listed here

Change Requests										
name rev revision: Structure View		Filter:Active								
Name	Idle Days	Estimated Completion	State	Description	Change Process	Status	EC Affected	Related	Related CA	Owner
CR-0000395	7	28-Feb-2019	In Review	test	Engineering	Launch			ca-8258707	
CR-0000394	20	28-Feb-2019	In Review	TEST for rejected cha...	Supplier	Current Prod...			ca-8258707	
CR-0000393	22		Create	test	Engineering	Current Prod...			ca-8258707	
CR-0000391	39	25-Jan-2019	Create	Increase 00022556-R...	Engineering	Launch			CA-0049640	
CR-0000390	39	15-Feb-2019	Create	Flex Touch PCB	Engineering	Launch				
CR-0000389	39	30-Apr-2019	Create	MEM is in the process...	Supplier	Current Prod...			CA-0049613	
CR-0000388	40	24-Jan-2019	Create	Gerber Changes - Drawings' Updates	Supplier	Launch			CA-0049596	
CR-0000387	40	24-Jan-2019	Create	Gerber Changes - Drawings' Updates	Supplier	Launch			CA-0049596	
CR-0000386	40	24-Jan-2019	Create	- Gerber Changes - Drawings' Updates	Supplier	Launch				

Columns:

The **Change Requests** page shows the following information:

Name: Change Request number, it's also a link to Change Request details form

 : represent the state of the CR:  = delay,  = approaching expected date

Idle days: Number of calendar days which have elapsed since the CR has been in the current lifecycle state.

Estimated Completion: expected date by when the CR should be closed

State: Change Request state (Create, Evaluate, In Review, In Process CO, Complete, On Hold, Cancelled)

Description, Change Process, Status EC Affected Items: Change Request information

Related CO: Change Order related to Change Request- only exists after CR is approved

Related CA: lists all CAs linked to the CR. These are shortcut links that open the CA information page.

Owner: CR owner at the current time (this changes throughout the lifecycle of the CR)

Originated: Date when the CR was created

 : link to open CR in a new window

Toolbar icons:

 Create a new Change Request

 Delete selected CR (if user has the permission)

 Send a Notification related to the selected CR, to CR originator, in order to provide information

Version	4.0	Date:	27-November-2017
Status	Released		64

Change Request Details

Click on the name to view all the details on the main window or use  icon to open part details on a new window.

CR-0000393 test State: Create Evaluate Owner: Joseph Zammit Modified: 04-Feb-2019 10:11:39

Change Request

Drop files here

CR-0000393

Properties Estimated Cost Affected Items Change Actions Reference Documen... Review >>

Content Collaboration Impact Analysis Reference Documents Change Orders Meetings Report

Information and Status

Messages Status

Basic

Change Evaluator	Joseph Zammit	Owner	Joseph Zammit
------------------	---------------	-------	---------------

Change Details and Related Information

Change Process	Engineering	Status Affected Items	Current Production
Change Request Driver	Customer Driven	Severity	Low
Description	test	Reason for Change	test
Program/Platform #		Notes	
Duration Alert Days	5	Dependent Parts	FALSE
Connected RFQ			

A Change Request object contains the following information:

- **CR Name:** displays several tabs with CR information
- **Content:** details about affected items and new items generated
- **Collaboration:** displays options for CR subscription
- **Impact Analysis:** shows CR impact analysis details if any have been recorded by the user
- **Reference documents:** shows reference documents that have been uploaded to the CR
- **Change Orders:** lists all COs connected to the CR
- **Meetings:** lists any recorded meetings in relation to the CR
- **Report:** Displays summary of all main CR details. User can generate report by using the function in the toolbar - Tools > Printer Friendly

Further information about CRs is available in the Engineering Change User Manual.

Toolbar icons:



Enables Edit function. This is only available to CR owner



Transfer ownership function – used to transfer ownership from one Change evaluator to another



Cancel CR – Sets state of CR to CANCELLED. CR is not deleted but remains visible under inactive CRs. This is only available to CR owner



Hold CR – Sets state of CR to ON HOLD. CR can be later resumed using the same button. This is only available to CR owner



This is used to subscribe notifications when the CR information is updated



HTML report – Issues a report with CR information in HTML format

Version	4.0	Date:	27-November-2017
Status	Released		65

Change Orders

All active COs are listed here

Change Requests							
Change Orders							
Change Actions							
CMS Change Notice...							
name rev revision: Structure View Filter:Active							
Name	Estimated Completion	State	Description	Change Process	Status EC Affected Items	Related CR	R
 CO-0042159	04-Mar-2017	Compl...	This ECN is being issued ... This ECN affects Alfa 949... ECN due to change in Sp...	Engineering	Launch	CR-0000004	
 CO-0043990	16-Jun-2017	Prepare	Trimming Electronic com...	Process	Current Production	CR-0000006	
 CO-0044112	22-Jun-2017	Compl...	20545 screw level upindex	Engineering	Current Production	CR-0000011	
 CO-0043991	30-Jun-2017	Compl...	Change part number of c...	Engineering	Launch	CR-0000009	
 CO-0044117	30-Jun-2017	Compl...	Change of resistor from V... 00052455 - R2 and R3 00052465 - R2, R5 and R8	Engineering	Launch	CR-0000019	

Columns:

The **Change Orders** page shows the following information:

Name: Change Order number, it's also a link to Change Order details form

Estimated Completion: expected date by when CO should be completed

State: Change Order state (Prepare, In Work, In Approval, Complete, Implemented, On Hold, Cancelled)

Description, Type of Change Notice, Status EC Affected Items: Change Request information

Related CR: link to the CR relating to this CO

Related CA: link to the CA relating to this CO

Owner: Change Order owner (usually this is the change evaluator)

Proposed Changes: link to the respective MCO



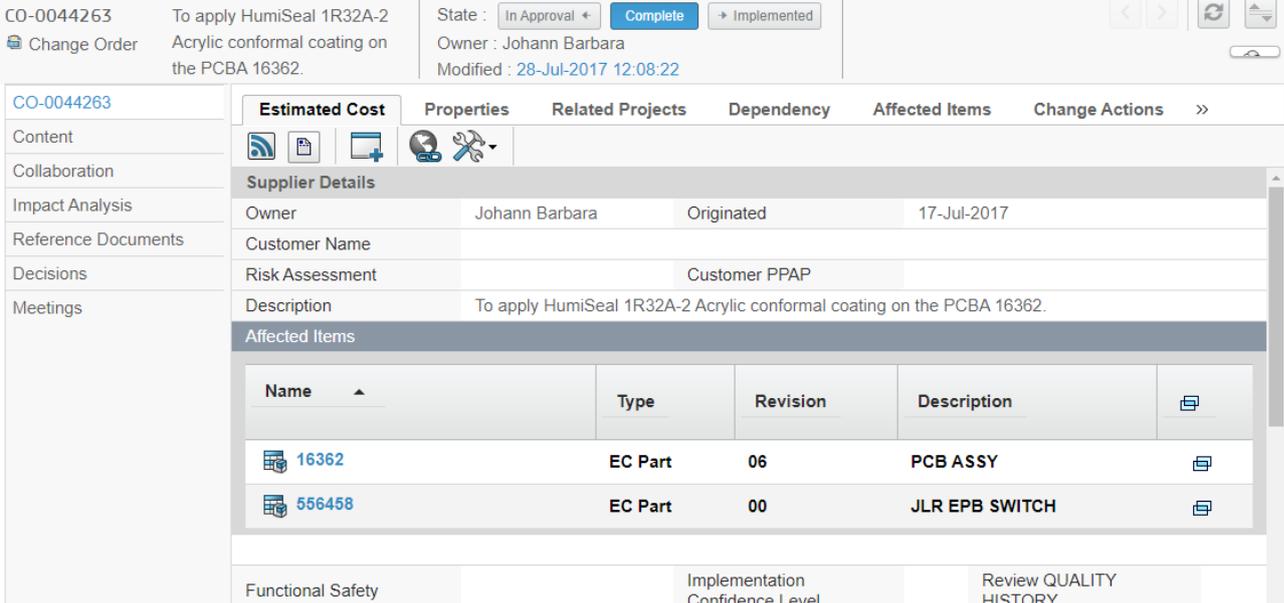
: link to open CR in a new window

Version	4.0	Date:	27-November-2017
Status	Released		66

Change Order Details

Click on the name to view all the details on the main window or use  icon to open change details in a new window.

On different tabs are listed the following information:



CO-0044263 To apply HumiSeal 1R32A-2 Acrylic conformal coating on the PCBA 16362. State: In Approval Complete Implemented Owner: Johann Barbara Modified: 28-Jul-2017 12:08:22

Change Order

CO-0044263

Estimated Cost Properties Related Projects Dependency Affected Items Change Actions >>

Content

Collaboration

Impact Analysis

Reference Documents

Decisions

Meetings

Supplier Details

Owner Johann Barbara Originated 17-Jul-2017

Customer Name

Risk Assessment Customer PPAP

Description To apply HumiSeal 1R32A-2 Acrylic conformal coating on the PCBA 16362.

Affected Items

Name	Type	Revision	Description
 16362	EC Part	06	PCB ASSY
 556458	EC Part	00	JLR EPB SWITCH

Functional Safety Implementation Confidence Level Review QUALITY HISTORY

- **CO Name:** displays several tabs with CO information
- **Content:** details about affected items and new items generated
- **Collaboration:** displays options for CO subscription
- **Impact Analysis:** shows CO impact analysis details if any have been recorded by the user
- **Reference documents:** shows reference documents that have been uploaded to the CO
- **Decisions:** lists any recorded decisions in relation to the CO
- **Meetings:** lists any recorded meetings in relation to the CO

Version	4.0	Date:	27-November-2017
Status	Released		67

Change Actions

Here are listed only the CAs which the user is owner of and when the related CR is approved.

Change Requests Change Orders Change Actions CMS Change Notice...									
name rev revision: Structure View Filter: Pending									
Name	Type	State		Responsible Org	Assignee	Affected Items	Owning CO	Completion Date	
<input type="checkbox"/> CA-0043535	Change Action	Prepare		METHODE ELE...	Toufik Maatouk	16433	CR-000058 CO-0045740	25-Aug-2017	
<input type="checkbox"/> CA-0046728	Change Action	Prepare		METHODE ELE...	Edward Gingell	10616	CR-0000251 CO-0050119		
<input type="checkbox"/> CA-0047585	Change Action	Prepare		METHODE ELE...	Gilbert Spiteri	10614	CR-0000270 CO-0050592		
<input type="checkbox"/> CA-0047743	Change Action	Prepare		METHODE ELE...	Nicolas Razzouk	10641	CR-0000300 CO-0049646		
<input type="checkbox"/> CA-0047844	Change Action	Prepare		METHODE ELE...	Allen Carl Bonnici	10638	CR-0000306 CO-0049610		
<input type="checkbox"/> CA-0047878	Change Action	Prepare		METHODE ELE...	Mario Pullicino	10639	CR-0000310 CO-0050335		
<input type="checkbox"/> CA-0047888	Change Action	Prepare		METHODE ELE...	Christian (ENG)...	10633	CR-0000313 CO-0049654	03-Oct-2018	

Columns:

The **Change Action** page shows the following information:

Name: Change Action number, it's also a link to Change Action details form

Type: always Change Action

State: Change Action state (in this page, always Prepare)

: represent the state of the CR: = delay, = approaching expected date

Responsible Organisation: In this case, always Methode Electronics

Assignee: user assigned to implement part new revision

Affected Items: parts affected by Change Action (parts to be revised)

Owning CO: Change Request and Change Order object, related to Change Action

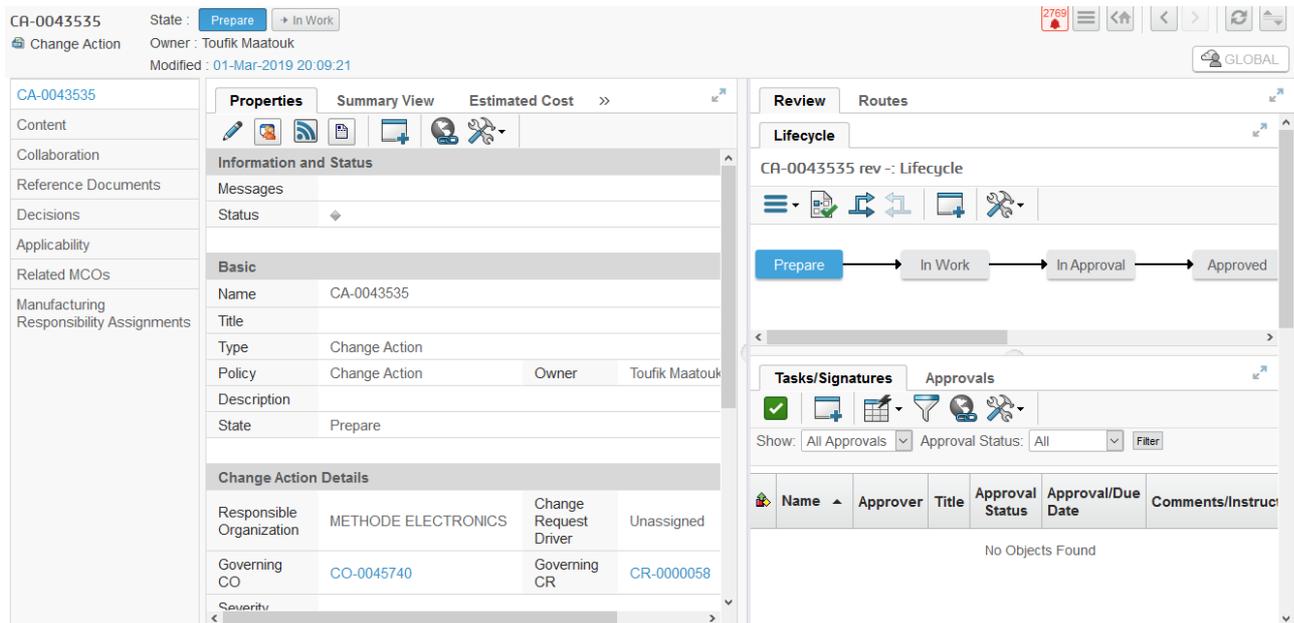
Completion date: Date by when assignee plans to complete the CA

: link to launch CA in a new window

Version	4.0	Date:	27-November-2017
Status	Released		68

Change Action Details

Click on the name to view all the details on the main window or use  icon to open change action details in a new window.



- **CA Name:** displays several tabs with CA information
- **Content:** details about affected items and new items generated
 - Affected items: part in revision n
 - Implemented items: new part in revision n+1
 - Markups: proposed changes, prepared by Engineers, during a Massive Change
- **Collaboration:** displays options for CA subscription
- **Impact analysis:** shows CA impact analysis details if any have been recorded by the user
- **Reference Documents:** shows reference documents that have been uploaded to the CA
- **Decisions:** lists any recorded decisions in relation to the CA
- **Applicability:** displays CA applicability summary
- **Related MCOs:** lists all MCOs related to the CA
- **Manufacturing Responsibility Assignments:** shows parts and respective plants related to this CA as set by the user

Version	4.0	Date:	27-November-2017
Status	Released		69

CMS Change Notice

All active CMS Change Notices are listed here; only users with role Change Coordinator (Change Management, Launch Management and MBOM Engineers) have access to this tab.

Every time a MCO related to a change is implemented by an MBOM Engineer, a CMS Change Notice is created. This allows users to manage the implementation date of the change (change effectivity date).

Change Requests Change Orders Change Actions CMS Change Notice...							
name rev revision: Structure View Filter:Active							
Name	Related Part	Related MCO	Related CA	Related CR	Start Date	Current	Notes
CN0001549	10076112 00052970	MCO-0037304	CA-0047293	CR-0000233	25-Dec-2019	Open	SWITCH :0005
CN0001547	553046	MCO-0037253	CA-0040177		25-Dec-2019	Open	SWITCH :1632
CN0001546	00000324 57597	MCO-0037153	CA-0045548	CR-0000182	01-Nov-2018	Open	SWITCH :0005
CN0001545	800082	MCO-0037129	CA-0045781	CR-0000197	25-Dec-2018	Open	SWITCH :1659
CN0001543	00002251	MCO-0037127	CA-0047444	CR-0000226	25-Dec-2018	Open	SWITCH :0000
CN0001542	10091601 10091572 10091582 10091562 10091592 10091552	MCO-0037085	CA-0047782	CR-0000293	25-Dec-2018	Open	SWITCH :1007
CN0001541	750153 750152-53	MCO-0037079	CA-0047801		01-Mar-2019	Open	SWITCH :5687

Columns:

The **CMS Change Notices** page shows the following information:

Name: CMS Change Notice number, it's also a link to CMS Change Notice details form

Related Part: Part affected by Change Notice

Related MCO, Related CA, Related CR: change objects related to CMS Change Notice (PLM change objects related to change process that have generated the CMS Change Notice)

Start Date: CMS Change Notice start effectivity date

Current: CMS Change Notice state (Create, Open, Released, Rejected)

Notes: Notes on respective CN

Version	4.0	Date:	27-November-2017
Status	Released		70

Home Project Lead User

This home page is available for project lead users

Programs

Programs are groups of projects

Name	Description	Status	Created By	Created Date
P14	P14	Active	Test Everything	Oct 22, 2015
X151	X151	Active	Test Everything	Oct 20, 2015
X152	X152	Active	Test Everything	Oct 14, 2015

Columns:

The Programs page shows the following information:

Name: Programs name, it's also a link to Program details form

Description: program description

Status: program state (Active, Inactive)

Created by: program creator

Created date: date when program was created

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Status	Released		72

Toolbar icons:



Allows user to create a new Program



Allows user to delete an existing Program

Click on the name of the program to open the detail page:

The screenshot displays the 'CN FORD 2016' program detail page. At the top, the program name and state ('Active') are shown. Below this is a table listing projects with columns for Name, Current Phase, Type, Status, Owner, Estimated Finish Date, Act Finish, Created Date, and Program. The table contains three rows of project data. To the right of the table is a dashboard area with sections for 'Pending Tasks', 'Pending Deliverables', 'Pending Issues', 'Assessments', and 'Efforts'. Each section includes a bar chart or progress indicator. The 'Pending Tasks' section shows a bar chart with values for 'This Week', 'This Month', 'Next 30 Days', and 'Overdue'. The 'Efforts' section shows a bar chart with 'Actual', 'Progress', and 'Planned' values.

Side panel comes out automatically and shows summary dashboard for that program. The side panel can be hidden by clicking on the **Hide Panel** command.

Program Menu:

- **Projects summary reports**
- **History**
- **Lifecycle**
- **Projects**
- **Decisions**
- **Meetings**

Version	4.0	Date:	27-November-2017
Status	Released		73

Projects

In the projects tab all the active projects are listed. The users that are members in a project have read / write access while in the projects that they are not a member of, they only have read access.

Project is a container of tasks, containing all the related information of a project (like schedule, issues, project folders, etc.).

Name	Current Phase	Project Type	Status	Owner	Governed Item	Variants	Estimated Finish Date	Act Finish	Created Date	Program	Type
AM800 - Console	Customer ...	Launch Man...	Ready	Laura Bonello	AM800 - Cons	10136103	03-Dec-2020		12-Dec-2018	AML Shadow ...	Prc
AM800 - Seat Adjust Shadow Chrome	Customer ...	Launch Man...	In Work	Laura Bonello	AM800 - Seat	10121951 10121961 10121971 10121981 10121951	25-Nov-2020		04-Dec-2018	AML Shadow ...	Prc
AM800 - Single Rockers	Customer ...	Launch Man...	In Work	Laura Bonello	AM800 - Singl	10122051 10122061 10122071	25-Nov-2020		04-Dec-2018		Prc
FIAT NPS		Launch Man...	Preliminary	Laura Bonello			13-Nov-2020		22-Nov-2018	FIAT NPS	Prc
JLR 480 Hazard Switch	Customer ...	Launch Man...	Ready	Stanley Muller	JLR L480 Haz		20-Oct-2020		29-Oct-2018	JLR L480	Prc
VW LINDa - Overhead Module	Customer ...		In Work	Marc Rodenas A...	VW Overhead	10088832 10091040 10091030 10116595 10116585 10116624 10130250 10152994 10087144	23-Sep-2020		16-Jan-2018	VW 37WLIN...	Prc

Columns:

In the projects tab the following information is shown:

: represent the state of the project: = delay, = approaching end date, = complete

Current phase: current phase of the project

Project Type: Launch/ Change Management project

Status: lifecycle state (Create, Assign, Active, Review, Complete, Archive)

Owner: owner of the project

Governed item: Collective name for the product variant/s that are to be launched by this project

Variants: All variants which to be launched by this project (as listed under the governed item)

Estimated finish date: the estimated end date of the project

Act finish: date when the project reaches complete state.

Created Date: creation date of the project

Program: the program this project is linked to

Type: object type (Project Space, Project Baseline, etc...)

Description: description of the project

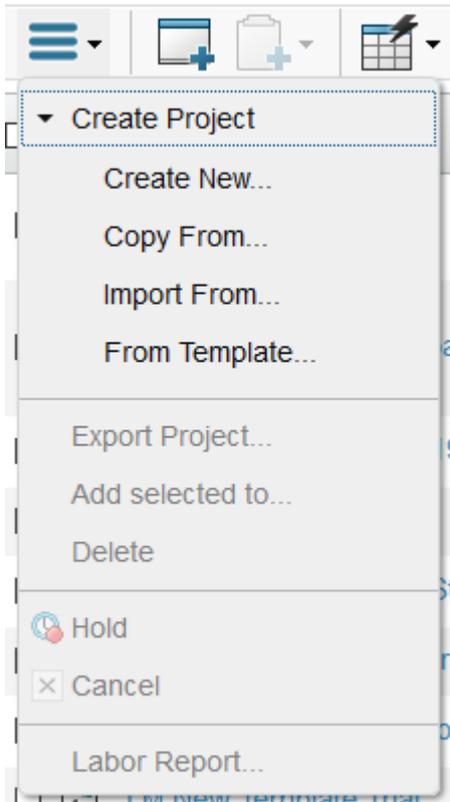
: link to open Project in a new window

Version	4.0	Date:	27-November-2017
Status	Released		74

Toolbar icons:



Provides several commands related to projects



Create Project: create a new project (new without folders and tasks, copy from another existing project, import from a csv file properly configured, new from a template with folders and tasks)

Export Project: allows users to export project timing in a csv file

Delete: allows project owner to delete a project (only in state Create and if no deliverable exists)

Hold, Resume, Cancel: allows project owner to hold a project, resume a held project, cancel a project (means it is existing in PLM but not active)

Version	4.0	Date:	27-November-2017
Status	Released		75

Project Details:

Click on the name of the project to open the project information window:



Main menu:

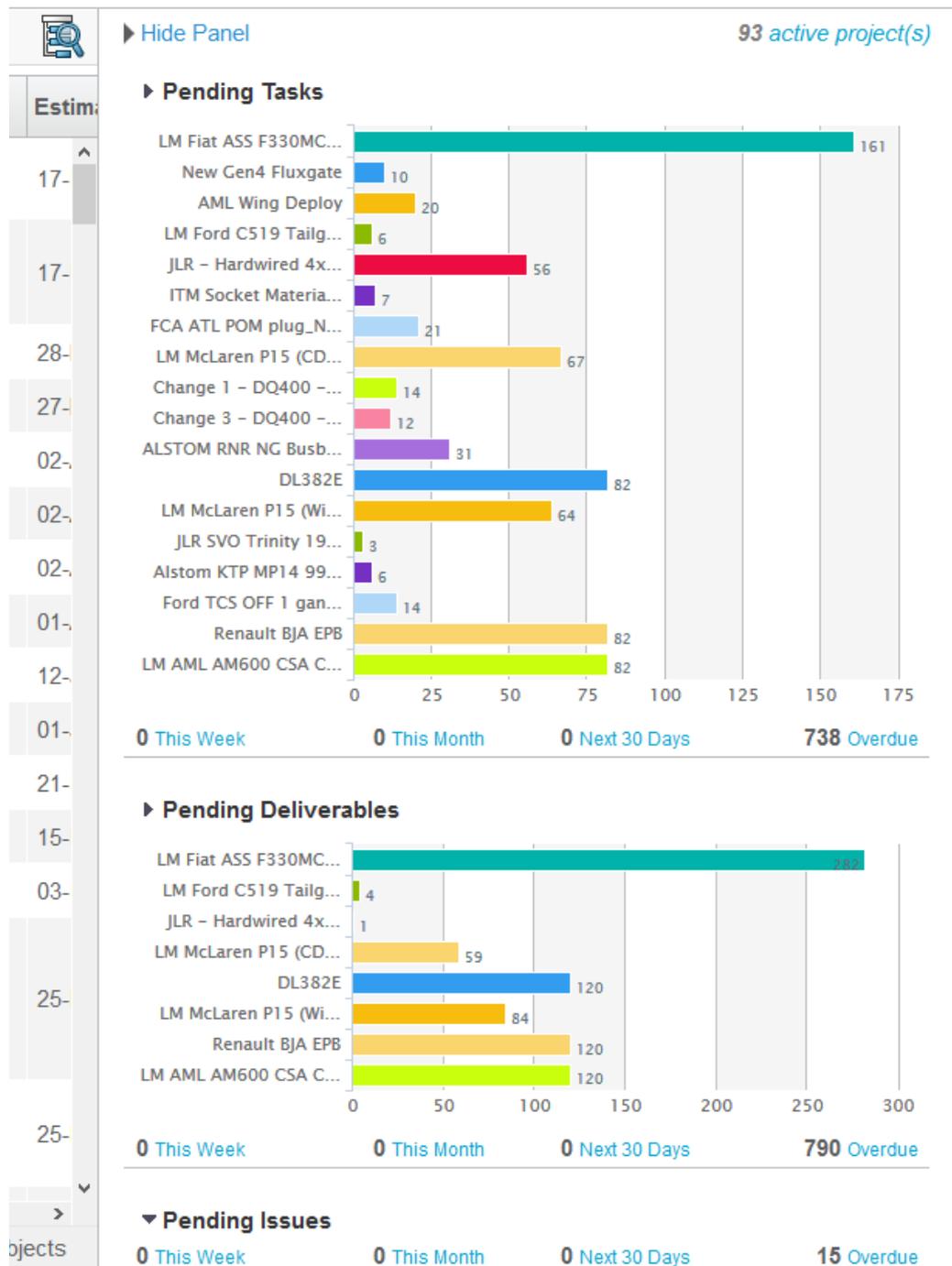


- **Schedule:** project timing plan in a WBS
- **Collaboration:** lists project bookmarks, decisions, discussions, meetings
- **Details:** details of the project
- **Execution:** events that influence the project (issues, risks, routes, approvals, assessments, CO, Governed Items)
- **Experiments:** different versions of project, used to perform what-if tests
- **Folders:** repository of generic documents collected in folders
- **People:** list of the project team members
- **Issues:** issues that afflict the project

Version	4.0	Date:	27-November-2017
Status	Released		76

Project Summary Report

In this tab we have a graphical summary of all active projects in which the user is a member. The graphic can be hidden using the **Hide Panel** icon.



Version	4.0	Date:	27-November-2017
Status	Released		77

Portfolios

Portfolios are groups of products

Name	Type	Description	Owner	Item Count
JLR L405	Portfolio	JLR L405	Johann Barbara	4
P-0000001	Portfolio	BMW projects	Joseph Zammit	0
P-0000002	Portfolio	AML	Laura Bonello	2

Columns:

The Portfolios page shows the following information:

Name: Portfolio name, it's also a link to Portfolios details form

Type: always portfolio

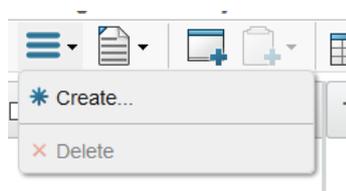
Description: portfolio description

Owner: portfolio originator

Item Count: number of products contained in portfolio

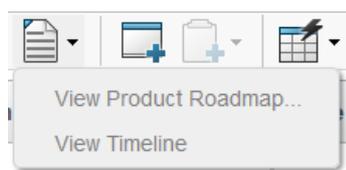
 : link to open portfolio in a new window

Toolbar icons:



Actions: the menu contains command to:

- **Create:** create a new portfolio
- **Delete:** delete the selected portfolios



Reports: the menu contains command to view:

- **product roadmap:** roadmap of product implementation

Name	Revisor	Type	Governing Project	Current Phase	Phase Completion	Label 1	Label 2	Label
HP-0000001	A	Hard...						
HP-0000002	A	Hard...						
HP-0000003	A	Hard...						
HP-0000004	A	Hard...						
HP-0000006	A	Hard...	A7	Gate 5 - Revi...	Dec 10, 2015			

- **Timeline:**



Version	4.0	Date:	27-November-2017
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Portfolio Details

Click on the name to view all the details on the main window or use  icon to open portfolio details on a new window.

Name	Revi	Type	Description	State	Owner	
  HP-0000001	A	Hardware Product	Glove Box SW for JLR 405	Preliminary	Test Everything	
  HP-0000002	A	Hardware Product	Memory / Massage SW for JLR 405	Preliminary	Test Everything	
  HP-0000003	A	Hardware Product	Single and Dual SW for JLR 405	Preliminary	Test Everything	
  HP-0000004	A	Hardware Product	Engine Start Stop for JLR 405	Preliminary	Test Everything	

Columns:

The Portfolio Content page shows the following information:

Name: Product name, it's also a link to Product details form



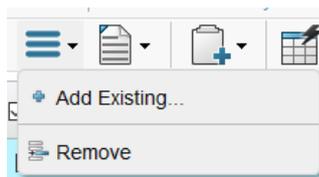
: Product Image

Rev: Product revision

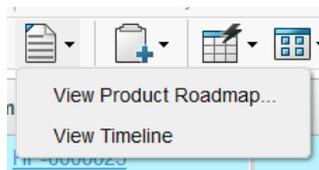
Type: always Hardware Product

Description: Product description

Toolbar icons:



Actions: menu contains command to add or remove a product from portfolio content



View Product Roadmap: show product roadmap (a product to project task configuration has been implemented)

View Timeline: show product timeline (a product to project task configuration has been implemented)

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Products

Products are items managed by Methode as finished products. The product can be composed by variants, which are items defined in system with BOM and drawings.

Marketing Name	Name	Model	Revision	Type	Governing Project	Current Phase	Phase Completion	State	Owner
AA	HP-0000024	HP-0000024	A	Hardware Product				Preliminary	Joseph Zamm

Columns:

The Products page shows the following information:

Marketing Name: product marketing name, it's also a link to Portfolios details form

Name: product name (automatically generated by system)



: Product Image

Model: equals to Name

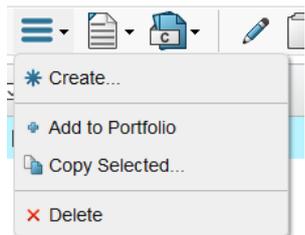
Rev: Product revision

Type: always Hardware Product

Governing Project: project governing the product roadmap

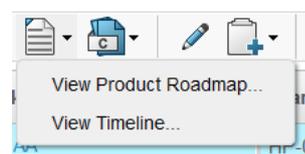
Current Phase: project current phase

Toolbar icons:



Actions: the menu contains the following commands:

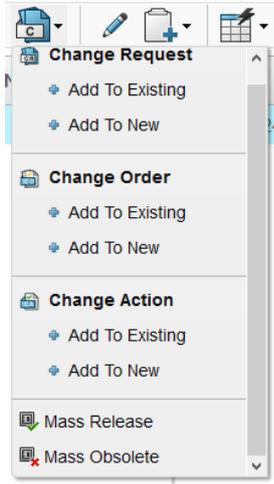
- **Create:** create a new product
- **Add to Portfolio:** add a product to a portfolio content
- **Copy selected:** create a new product copying another product
- **Delete:** delete a product



Reports: the menu contains command to view:

- **product roadmap:** roadmap of product implementation
- **Timeline:** product timeline (if a product to project task configuration has been implemented)

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Change: the menu contains command to manage changes on the product:

- **Change Request:** Add product to New or Existing CR
- **Change Order:** Add product to New or Existing CO
- **Change Action:** Add product to New or Existing CA
- **Mass Release:** Set state of all selected products to released
- **Mass Obsolete:** Set state of all selected products to obsolete



Enable Edit: To edit Governing Projects related to the products.

Product Details

Click on the name to view all the details on the main window or use  icon to open product details on a new window.

Name	Revisor	Description	State	Remarks
00055426	00	EMCM LOW 949-952	Release	
00055436	00	EMCM HIGH 949-952	Release	

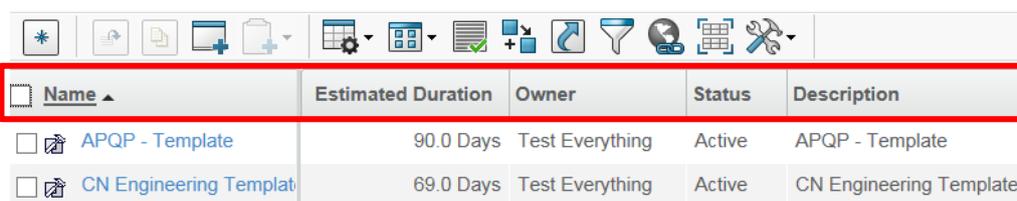
Version	4.0	Date:	27-November-2017
Status	Released		81

Projects Templates

In this page are listed all the templates available to be used to create new projects

Projects Programs Projects Summary ... **Project Templates** Portfolios Products

Project Templates | Filter:Active



The screenshot shows a toolbar with various icons for creating, deleting, and copying templates. Below the toolbar is a table with the following columns: Name, Estimated Duration, Owner, Status, and Description. Two templates are listed: APQP - Template and CN Engineering Template.

Name	Estimated Duration	Owner	Status	Description
<input type="checkbox"/> APQP - Template	90.0 Days	Test Everything	Active	APQP - Template
<input type="checkbox"/> CN Engineering Templat	69.0 Days	Test Everything	Active	CN Engineering Template

Columns:

The Project Template page shows the following information:

Name: Project Template name, it's also a link to Project Template details form

Estimated Duration: Project Template duration

Owner: Project Template originator

Status: Project Template state (Active, Inactive)

Description: Project Template description

Toolbar icons:

Commands are available only to users with role Project Administrator



Create: allows users to create a new Project Template



Remove Selected: allows users to delete a Project Template



Copy Selected: allows users to create a new Project Template copying folders and timing plan from select template

Version	4.0	Date:	27-November-2017
Status	Released		82

Projects Templates Details

Click on the name to view all the details.

Task Name	Task Type	Id	Dependence	State	Estimated Duration	Constraint Type	Task required	Project Role	Level	Description
PDPLS - Template (Ver 2)	Project	...	0	Active	486.0 Days	As Soon As Pos...				PDPLS - Temp
Customer Milestone	Phase	1	0	Preliminary	0.0 Days	As Soon As Pos...	Mandatory		1	
PLS PHASE 1	Phase	10	0	Preliminary	155.0 Days	As Soon As Pos...	Mandatory		2	
PLS PHASE 2	Phase	38	0	Preliminary	141.0 Days	As Soon As Pos...	Mandatory		3	Tooling Order d
PLS PHASE 3	Phase	60	0	Preliminary	312.0 Days	As Soon As Pos...	Mandatory		4	
PLS PHASE 4	Phase	96	1	Preliminary	486.0 Days	As Soon As Pos...	Mandatory		5	
PLS PHASE 5	Phase	110	1	Preliminary	0.0 Days	As Soon As Pos...	Mandatory		6	

Refer to Project page regarding columns and toolbar icons.

Refer to Project page regarding menus available. The menus which are not available for project templates are related to people definition and execution, because a Project Template has no tasks and execution information.

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Issues Summary

Main page of the issues which shows all the issues assigned to the user, in ANY state; also shows a graphical view in a sidebar. The sidebar can be hidden by using the **Hide Panel** icon.

Issues Summary

 Hide Panel

There are 24 issues

Select: All

Name ▲	Edit			Reported Against	
ISS-0000123			0	PLM Implementa...	
ISS-0000124			0	PLM Implementa...	
ISS-0000125			0	PLM Implementa...	
ISS-0000126			0	PLM Implementa...	
ISS-0000127			0	PLM Implementa...	
ISS-0000150			0	P1	
ISS-0000167			0	P1	
ISS-0000173			0	000000010	
ISS-0000174			0	000000010	
ISS-0000175			0	000000044	
ISS-0000177			0	Test Export	
ISS-0000178			0	P1	
ISS-0000180			0	Alpha Test	

Issues by Priority

Priority	Count
Urgent	0
High	2
Medium	0
Low	22
Pre-assigned	0

Issues by State

State	Count
Create	24
Assign	2
Active	3
Review	2
Closed	12

Issues by Problem Type

Problem Type	Count
Not Determined	24

The columns show the following information:

Name: name of the task. It will be displayed in red if a sub task of it is in delay

: represent the state of the issue: = delay, = approaching end date, = complete

: number of documents related to the task

Reported Against: item afflicted by the issue

Classification, Description, Visibility, Domain, Priority: issue classification

Action taken: description of the action taken on the issue

% completed: the percentage to finish the issue

Approver: if an approver is needed it is listed here

Est Finish: estimated completion date for the issue

Actual Start: the actual date when progress is tracked on the issue

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Shortcuts...

The shortcuts menu opens a side panel on the right of the main page with links to shortcuts defined by the user.

The shortcuts panel contains the following sections:

- Recently viewed: shows recently viewed objects.
- Clipboard: Clipboards are a collaborative tool, sort of repository, where the user can collect objects.
- Collection: A collaborative tool where the user can collect objects; collection name is defined by the user.

The screenshot shows the ENOVIA software interface. At the top, there is a navigation bar with the ENOVIA logo, the text '3DEXPERIENCE | ENOVIA Collaboration and App..', a search bar, and user information 'Samantha Grima'. Below the navigation bar, there are tabs for 'Parts to Release', 'Parts to Complete', 'MCOs', and 'Manufacturing Par...'. A table displays a list of parts with columns for Name, Classification, Rev, Description, Manufacturing Responsibility, and End I. On the right side, there is a 'Shortcuts' panel with sections for 'Recently Viewed', 'Clipboard', and 'collection 1'.

Name	Classification	Rev	Description	Manufacturing Responsibility	End I
1.960259	Finished Product	00	DSC CONTROL SWITCH	Malta	Ye
40506-05		00	COMPRESSION SPRING	Malta	Ye
40552-08		00	COMPRESSION SPRING	Malta	Ye
40625-05		00	COMPRESSION SPRING	Malta	Ye
40674-01		00	COMPRESSION SPRING	Malta	Ye
40686-08		00	COMPRESSION SPRING	Malta	Ye
40696-03		00	COMPRESSION SPRING	Egypt, Malta	Ye

This close-up shows the 'Recently Viewed' section of the shortcuts panel. Two objects are expanded to show their sub-menus. The first object, '1016663 00', has a sub-menu with items: Engineering BOM, Manufacturing BOM, Change Management, Specs & Documents, Related Parts, and Collaboration. The second object, '00058982-A 01C', has a sub-menu with items: Files, Route, Lifecycle, Related Parts, Revisions, and History. Red boxes highlight the sub-menu items and the expand/collapse arrows.

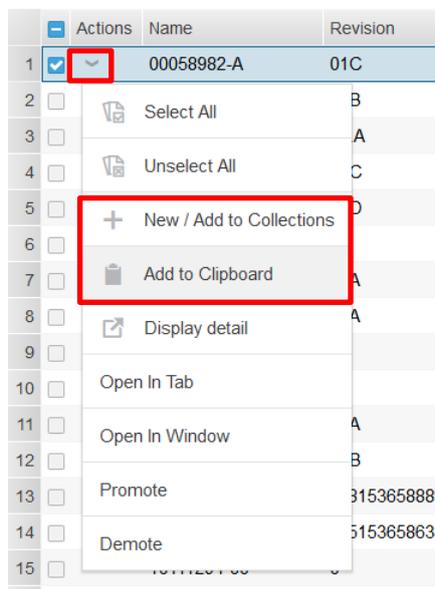
Clicking on the arrow beside an object in the shortcuts panel will expand a sub-menu related to that object allows the user to navigate immediately to that sub-menu of the object.

The shortcuts panel can be closed using the  button at the bottom right of the page.

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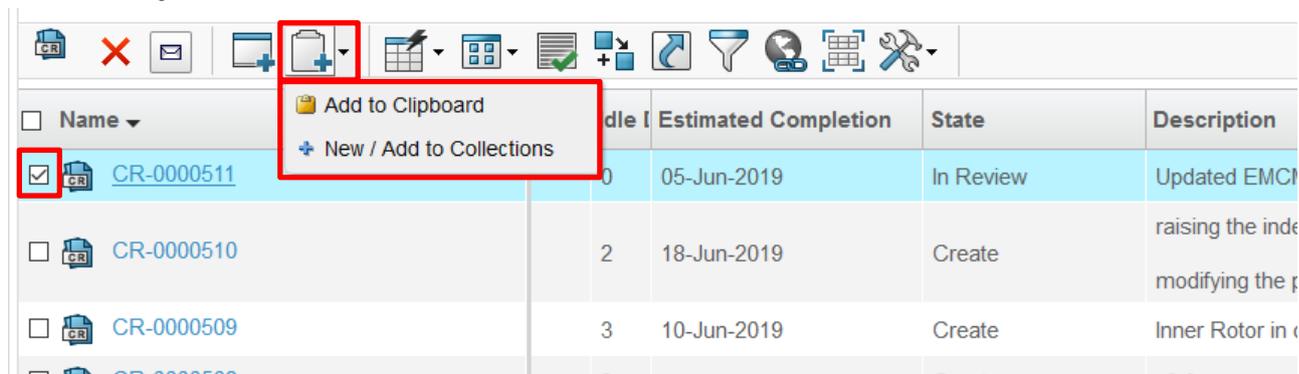
Create a shortcut from a search

- Search the item for which you want to create a shortcut
- Right click on the item or click on the arrow in the actions column to get a drop-down menu and choose whether to:
 - Add the selected objects to a user defined collections or/and create a new collections. If some collections already exist, they are listed in the roll-down menu.
 - Add the selected objects to default clipboard



Create a shortcut from a toolbar

- Select the item for which you want to create a shortcut
- Click on the arrow next to the clipboard icon  in the toolbar to get a drop-down menu and choose whether to:
 - Add the selected objects to default clipboard
 - Add the selected objects to a user defined collections or/and create a new collections. If some collections already exist, they are listed in the roll-down menu.
 -



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Collections

Collections is the page where are listed all the collection containers defined by the user (other than the Clipboard).

Collections			
<input type="checkbox"/> Name ▲	Description	Count	
<input checked="" type="checkbox"/> Clipboard		4	
<input type="checkbox"/> collection 1		1	

Toolbar icons:



Create a new collection



Duplicate an existing collection

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Status	Released		87

Subscriptions

Subscriptions allow users to be notified of the occurrence of a selected event.

The subscriptions page lists all the “subscriptions” of the user.

Subscriptions						
<input type="checkbox"/> Name ▲	Revisor	Type	Description	Event		
<input type="checkbox"/> 0000000507	B	Part	Index	New Discussion		
<input type="checkbox"/> 0000000507	B	Part	Index	Part Complete		
<input type="checkbox"/> 0000000507	B	Part	Index	Part Deleted		
<input checked="" type="checkbox"/> 0000000507	B	Part	Index	Part Moved to Production		

Create a subscription

- Search the item to subscribe
- Then flag the event you want to be subscribed

<input checked="" type="checkbox"/> Subscription Events ▲	Type	Email Address
<input checked="" type="checkbox"/> New Discussion	Event	
<input checked="" type="checkbox"/> Part Complete	Event	
<input checked="" type="checkbox"/> Part Deleted	Event	
<input checked="" type="checkbox"/> Part Moved to Production	Event	

- Confirm the subscription
- delete a subscription
- Allow to create a subscription to other users

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Status	Released		88