



 METHODE ELECTRONICS, INC.


pivotal
Italia

 CDM
TECHNOCONSULTING

Project Manager Use Cases

| | | | |
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| Version | 7 | Date: | 28-November-2017 |
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Terminology

- Project: collection of tasks to be performed to attain a specific objective
- WBS: Work Breakdown Structure is a hierarchy of tasks
- Project Lead: only user with this role can create new Projects LM & CM
- Project Member or Project User: users able to perform tasks and manage deliverable
- Role: role is a job function, like Design Engineer or Account Manager
- Route: a list of tasks defined for a group of people
- Dashboard: a view to show the status of selected projects
- Program: collection of projects of a similar nature or that have a common objective

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PM01 Project Space Management

| | | | |
|---------------------|--|---------------|--------|
| Purpose | Define and manage project template | Status | Define |
| Stakeholders | Project Administrator | | |
| Beginning | | | |
| Interactions | Project Administrator can create and update project template, used to create project with a standard structure | | |
| End | | | |
| Constraints | | | |

A project is a collection of tasks to be performed in a specific sequential order.

A project can be composed of one or more sub projects, with links between tasks in different subprojects.

The screenshot shows a project management interface for a project named 'Bosch'. The task list is as follows:

| Name | Type | Id | Dependency |
|---|--------------|----|-------------|
| Bosch | Project S... | | |
| Customer Milestones | Phase | 1 | 0 |
| PLS PHASE 1 - Program Release and Concept Development | Phase | 11 | 0 |
| Manage the Project Tasks | Task | 12 | 0 |
| Project Kick-Off by customer - SOW and LOI available | Task | 18 | 2:FS+0.0 d |
| Project Kick-off MEM - Account Manager | Task | 19 | 18:FS+0.0 d |
| Project Kick-off MEM - Finance | Task | 20 | 18:FS+0.0 d |
| Project Kick-off MEM - Launch Manager | Task | 21 | 18:FS+0.0 d |
| Project Kick-off MEM - PD | Task | 22 | 18:FS+0.0 d |
| Kick-off meeting at customer | Task | 23 | 18:FS+7.5 d |
| Product Design Phase Activities | Task | 24 | 0 |
| Process Design Phase Activities | Task | 50 | 0 |

A callout box points to the 'Dependency' column with the text: "Dependencies, links to other tasks".

1.1 Project Lifecycle

The life cycle of a project has a sequence of states. Each state determines who can interact with the project and what access the users have.



Depending on the maturity of the life cycle, different user can do different things on the projects explained in the following list:

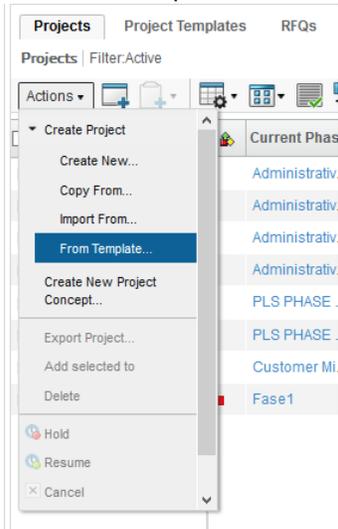
- Create: Project Lead can define WBS and assign the tasks to project members
- Assign: system will notify all members about assigned WBS tasks. Also, all WBS tasks are promoted to Assign state
- Active: project members will perform WBS tasks and submit deliverables
- Review: all deliverables can be reviewed
- Complete: state achieved automatically when all WBS are completed and deliverables are approved
- Archive: project is archived for future reference

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1.2 Project Creation

Functions available:

- Create New: create a new project from scratch, without default folders, tasks, phases and gates
- Copy From: clone an existing project to create a new project
- Import From: create a new project from file, created using an application like MS Excel or MS Project
- From Template: create a new project from an existing Project Template in Active state



1.2.1 Create New (creates a new project).

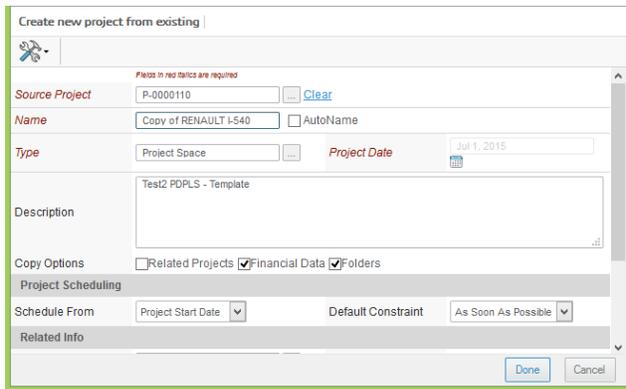
User has to define the **Name** (Auto Naming feature is available) and the **Project Date**, used with Schedule From to define tasks estimated dates.

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1.2.2 Copy From (Creates a project cloning an existing project).

The system copies the following structures:

- WBS tasks and dependencies
- Folders
- Documents
- Members



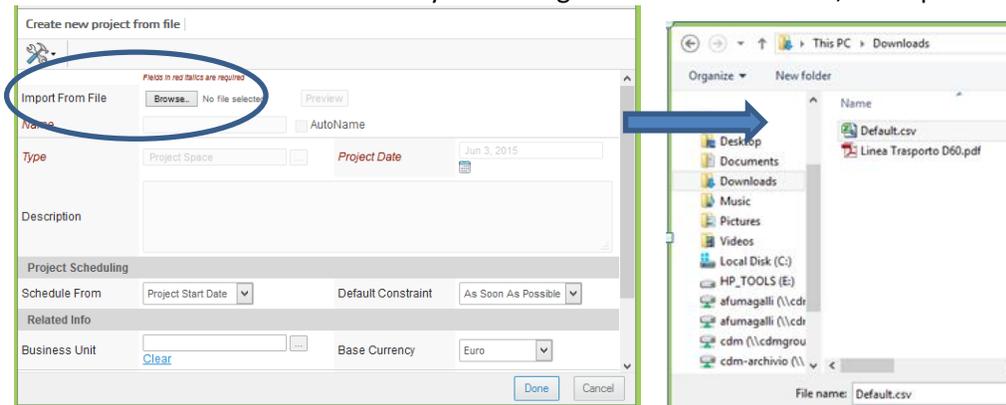
1.2.3 Import from (Create a project importing WBS tasks from file).

This feature allows user to import a project from an existing file generated by an application like MS Excel or MS Project.

The system copies the following structures:

- WBS tasks and dependencies
- Members

The user selects the file in the file system using the browse command, that opens an explorer window.



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1.2.4 From Template (Create a project from an existing project template).

The system copies the following structures:

- WBS tasks and dependencies
- Folders

The user can select the template searching in the system

Fields in red italics are required

Project Template [] [Clear]

Questions [No question to respond...] [Predict Schedule] [Preview]

Name [] AutoName

Type [Project Space] [] **Project Date** [Jun 3, 2015]

Description []

Copy Options Financial Data Folders **Resource Template** []

Project Scheduling

Schedule From [Project Start Date] **Default Constraint** [As Soon As Possible]

[Done] [Cancel]

| Search Refinement | | Search Results | | | | | Results: 7 |
|--|--|---------------------------|------------------|---------|--------|---------|----------------|
| Search | | Name | Current Phase | Type | Status | Owner | Estimated Fini |
| <input checked="" type="checkbox"/> Case Sensitive | | ○ CN Engineering Template | Administrativ... | Proj... | Active | Test... | Aug 17, 2015 |
| Limit to 100 results | | ○ CN Process Template | Administrativ... | Proj... | Active | Test... | Aug 14, 2015 |
| Type | | ○ CN Supplier Template | Administrativ... | Proj... | Active | Test... | Aug 13, 2015 |
| Project Template | | ○ PDPLS - Template | PLS PHASE ... | Proj... | Active | Test... | Feb 2, 2017 |
| Name | | ○ PDPLS - Template rev 1 | Customer Mi... | Proj... | Active | Test... | Feb 2, 2017 |
| | | ○ PDPLS - Template rev 2 | Customer Mi... | Proj... | Active | Test... | Feb 2, 2017 |
| Revision | | ○ RFQ - Template | Engineering ... | Proj... | Active | Test... | Mar 31, 2015 |
| <input type="checkbox"/> Highest <input type="checkbox"/> By State | | | | | | | |
| Description | | | | | | | |
| | | | | | | | |
| Policy | | | | | | | |
| | | | | | | | |

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1.3 Project Details

During project creation, Project Lead has to define project visibility, the available options are

- Company: default value, all users in your company can view the project by searching for it.
- Members: only people added as project members can view the project.

The screenshot shows the 'Project Scheduling' form. The 'Project Visibility' dropdown menu is open, showing three options: 'Members', 'Company', and 'Members'. The 'Members' option is highlighted in blue. Other fields include 'Schedule From' (Project Start Date), 'Default Constraint' (As Soon As Possible), 'Business Unit', 'Base Currency' (Euro), 'Program', 'Business Goal', and 'Policy'.

After the project creation, Project Lead can update owner, description, project date and constraint

The screenshot shows the 'Properties' tab of a project form. Several fields are circled in blue: 'Project Owner' (Test Everything), 'Description', 'Schedule From' (Project Start Date), 'Estimated Start Date' (Project Start Date), 'Estimated Finish Date' (Project Start Date), and 'Default Constraint' (As Soon As Possible). A calendar widget is visible for the 'Project Date' field, showing July 1, 2015. Other fields include 'Type' (Project Space), 'Name' (P-0000110), 'Policy' (Project Space), 'Base Currency' (Euro), 'Visibility' (Members), 'Creation Date' (Jun 1, 2015), 'Company Name', 'Business Unit', 'Program', 'Project Date' (Jul 1, 2015), 'Actual Start Date', 'Actual Finish Date', and 'Actual Duration' (0.0 Days).

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1.4 Project Preferences

Project owner or Project Lead users can define whether task due alerts are sent to task assignees, when they are sent, and whether and how often additional reminders are sent.

There is an option that allows user to schedule the project on estimated or actual dates

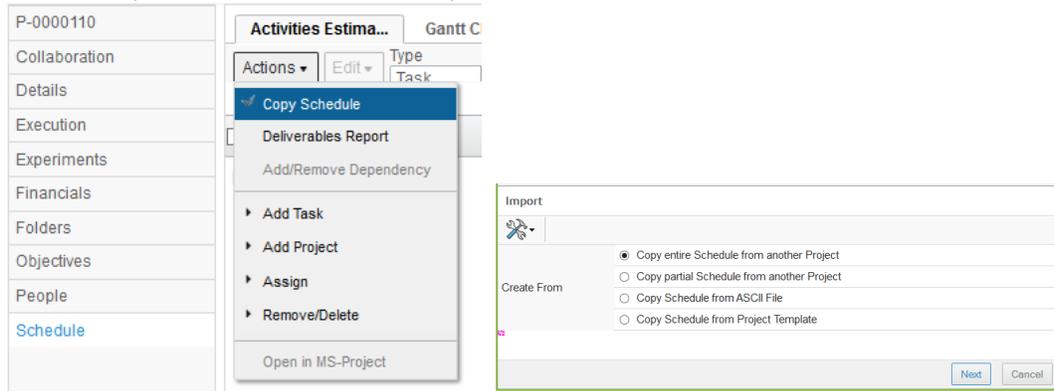
| | | | |
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1.5 Work Breakdown Structure

If the project is created from a template or from another project, its WBS is the copy of original WBS.

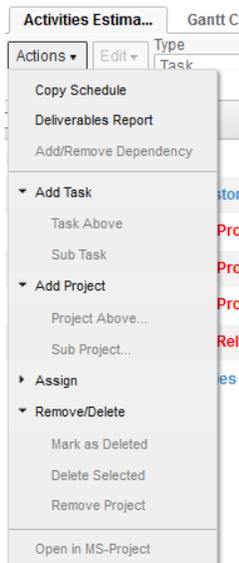
Project Lead can define or update WBS tasks using massive import functions:

- Import entire or partial WBS tasks from another project
- Import WBS tasks from a file (created from MS Excel or MS Project)
- Import WBS tasks from a template



The Project Lead can also update WBS tasks using functions in menu Actions:

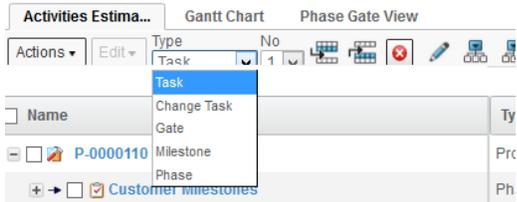
- Add tasks
- Add projects
- Remove projects or tasks (mark as deleted could be resumed)



Project Lead can update WBS tasks also using icons contained in toolbar or editing information from the table:

- Add tasks or other types
- Remove projects or tasks
- Modify estimated duration, dates and dependencies
- Define or update project role in tasks definition

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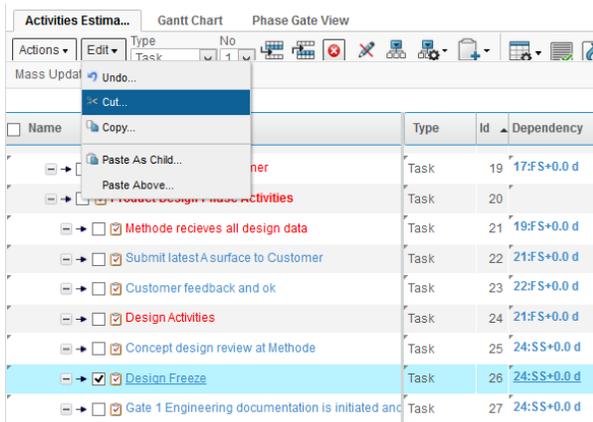


The following characters are not allowed in task name:

" # \$ @ % * , ? < > [] | : \

| Name | Type | Id | Dependency | State | % | Progress | Duration | Start Date | End Date | Actual |
|---|--------------|----|--------------|--------|-----|----------|------------|--------------|--------------|--------|
| P-0000110 | Project S... | | | Create | 0.0 | | 443.0 Days | Jul 1, 2015 | Mar 7, 2017 | 0. |
| Customer Milestones | Phase | 1 | 0 | Create | 0.0 | | 393.0 Days | Jul 1, 2015 | Dec 28, 2016 | 0. |
| PLS PHASE 1 - Program Release and Concept Development | Phase | 11 | 0 | Create | 0.0 | | 360.0 Days | Jul 1, 2015 | Nov 11, 2016 | 0. |
| Manage the Project Tasks | Task | 12 | 0 | Create | 0.0 | | 360.0 Days | Jul 1, 2015 | Nov 11, 2016 | 0. |
| Project Kick-Off by customer - SOW and LOI available | Task | 17 | 0 | Create | 0.0 | | 0.0 Days | Jul 1, 2015 | Jul 1, 2015 | 0. |
| Project Kick-off MEM - PRF issued and team formation | Task | 18 | 17:F:S+0.0 d | Create | 0.0 | | 5.0 Days | | | 5. |
| Kick-off meeting at customer | Task | 19 | 17:F:S+0.0 d | Create | 0.0 | | | | | 5. |
| Product Design Phase Activities | Task | 20 | 0 | Create | 0.0 | | 97.0 Days | Jul 2, 2015 | Nov 13, 2015 | 0. |
| Process Design Phase Activities | Task | 36 | 0 | Create | 0.0 | | 100.0 Days | Aug 13, 2015 | Dec 30, 2015 | 0. |
| Quality Activities | Task | 44 | 0 | Create | 0.0 | | 75.0 Days | Aug 13, 2015 | Nov 25, 2015 | 0. |
| Tooling Purchase Order from customer | Task | 46 | 24:FF+0.0 d | Create | 0.0 | | 5.0 Days | Nov 5, 2015 | Nov 11, 2015 | 0. |
| PLS Gate 1 - Review & Sign off | Gate | 47 | 24:SS+0.0 d | Create | 0.0 | | 0.0 Days | Aug 13, 2015 | Aug 13, 2015 | 0. |
| PLS PHASE 3 - Production Development | Phase | 48 | 0 | Create | 0.0 | | 246.0 Days | Aug 13, 2015 | Jul 19, 2016 | 0. |

Tasks (or gates, milestones, ...) can be «moved» inside the WBS structure, using the commands under the Edit menu



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1.6 Task Dependencies

Project Lead can define dependencies between tasks

Dependency Type

- FS (Finish-to-start)
- SF (Start-to-finish)
- FF (Finish-to-finish)
- SS (Start-to-start)

User can add dependencies for a task in the Create or Assign state. The Project Lead can use the “Edit” command and modify the string of the dependency by and. In this case the user must use the correct syntax (see **Dependency Syntax below**).

| Name | Type | Id | Dependency |
|------------------------|--------------|----|-------------------|
| Test 1 | Project S... | | |
| Customer Milestones | Phase | 1 | 0 |
| Supplier Nomination | Task | 2 | 0 |
| Design Freeze | Task | 3 | 47:FS+0.0 d |
| Parts from 1st Tooling | Task | 4 | 108:FS+0.0 d,1: 0 |

Alternatively the Project Lead can use the command under the Actions menu to add/remove dependencies

| Test 1 | Activities Estima... | Gantt Chart | PI |
|-------------------|-----------------------|-------------|------|
| Collaboration | Actions | Edit | Type |
| Details | Task | No | 1 |
| Execution | Copy Schedule | | |
| Experiments | Deliverables Report | | |
| Financials | Add/Remove Dependency | | |
| Folders | ▸ Add Task | | |
| Objectives | ▸ Add Project | | |
| People | ▸ Assign | | |
| Schedule | ▸ Remove/Delete | | |
| Issues | Open in MS-Project | | |
| Members and Roles | | | |

Definition: Slack Time

The number of days or hours before or after the date determined by the dependency type.

Dependency Syntax

Task ID: [Dependency Type] [Number of Slack Days or Hours, if any]

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Multiple dependencies

Displayed with a comma separator. For example “4:FS+2.0 d, 5:FS+12.0 d”

| | | | |
|--|------|----|---|
| <input type="checkbox"/> <input checked="" type="checkbox"/> Bought-in Tools | Task | 52 | 0 |
| <input type="checkbox"/> <input checked="" type="checkbox"/> Tool manufacturer kick-off | Task | 53 | 32:FS+0.0 d,34:FS+0.0 d,35:FS+0.0 d,40:FS+0.0 d |
| <input type="checkbox"/> <input checked="" type="checkbox"/> Tool design design review | Task | 54 | 53:FS+0.0 d |
| <input type="checkbox"/> <input checked="" type="checkbox"/> Tool manufacture | Task | 55 | 54:FS+0.0 d |
| <input type="checkbox"/> <input checked="" type="checkbox"/> PFMEA+ QCP for each tool | Task | 56 | 54:SS+0.0 d |
| <input type="checkbox"/> <input checked="" type="checkbox"/> Receipt of FOT (First-off tool) | Task | 57 | 55:FS+0.0 d |
| <input type="checkbox"/> <input checked="" type="checkbox"/> STA review assessment | Task | 58 | 57:FS+0.0 d |
| <input type="checkbox"/> <input checked="" type="checkbox"/> Tool tuning loop 1 | Task | 59 | 58:FS+0.0 d |

External cross project dependency

WBS Tasks can be dependent on other WBS Tasks that belong to projects external to the Master Project.

Only Project Lead can perform external task dependencies between projects

| | | | |
|---|------|----|---|
| <input type="checkbox"/> <input checked="" type="checkbox"/> Receipt of tuned parts | Task | 60 | 59:FS+0.0 d |
| <input type="checkbox"/> <input checked="" type="checkbox"/> STA review assessment and feedback | Task | 61 | 60:FS+0.0 d |
| <input type="checkbox"/> <input checked="" type="checkbox"/> Tool Tuning Loop 2 | Task | 62 | 61:FS+0.0 d |
| <input type="checkbox"/> <input checked="" type="checkbox"/> STA review assessment and feedback | Task | 63 | RENAULT I540:45:FS+0.0 d,62:FS+0.0 d |
| <input type="checkbox"/> <input checked="" type="checkbox"/> Bought In Components | Task | 64 | |
| <input type="checkbox"/> <input checked="" type="checkbox"/> Suppliers kick-off | Task | 65 | 32:FS+0.0 d,34:FS+0.0 d,35:FS+0.0 d,46:FS+0.0 d |
| <input type="checkbox"/> <input checked="" type="checkbox"/> Component design design reviews on | Task | 66 | 65:FS+0.0 d |

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1.7 Task Calendar

When the project is created and the tasks are defined, the estimated start and finish dates are retrieved by the system using the calendar related to location of project owner.

The user definition contains the user location

Edit My Profile

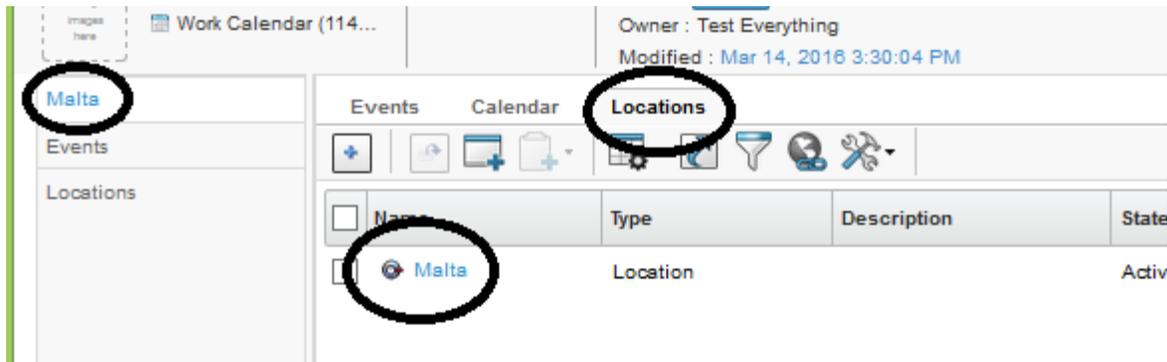
| | |
|-------------------------------|------------------------------|
| User Name | Johann |
| State | Active |
| First Name | Johann |
| Middle Name | |
| Last Name | Barbara |
| Company | METHODE ELECTRONICS |
| Business Unit | |
| Location | Malta |
| Company Representative | Not a Company Representative |

Organization Manager can define a calendar

| Malta | Events | Calendar | Locations | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------------|---|----------------|--------------|--------------|--------------------------|----------------------------|-----------|------------|----------|------------|-------|--------------------------|------------------------|----------------|--------------|--------------|--|------------------------|--------------------------|-------------|----------------|--------------|--------------|--|-------------|--------------------------|--------------|----------------|--------------|--------------|--|--------------|--------------------------|----------------------------|----------------|--------------|--------------|--|----------------------------|--------------------------|-------------|----------------|--------------|--------------|--|-------------|--------------------------|----------------|----------------|--------------|--------------|--|----------------|--------------------------|----------|--------|--|--|----------|--|--------------------------|-----------------------|----------------|-------------|-------------|--|-----------------------|--------------------------|----------------|----------------|--------------|-------------|--|----------------|--------------------------|-------------|----------------|-------------|-------------|--|-------------|--------------------------|-----------------------|----------------|--------------|--------------|--|-----------------------|--------------------------|------------|----------------|--------------|-------------|--|------------|--------------------------|-----------------------|----------------|-------------|--------------|--|------------------------|--------------------------|----------------|----------------|--------------|--------------|--|----------------|--------------------------|--------------------------|----------------|--------------|-------------|--|--------------------------|
| Events | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Locations | <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th><input type="checkbox"/></th> <th>Title</th> <th>Frequency</th> <th>Start Date</th> <th>End Date</th> <th>Day Number</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Independence Day Malta</td> <td>Non-Recurrence</td> <td>Sep 20, 2016</td> <td>Sep 21, 2016</td> <td></td> <td>Independence Day Malta</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Good Friday</td> <td>Non-Recurrence</td> <td>Mar 24, 2016</td> <td>Mar 25, 2016</td> <td></td> <td>Good Friday</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Saint Joseph</td> <td>Non-Recurrence</td> <td>Mar 18, 2016</td> <td>Mar 19, 2016</td> <td></td> <td>Saint Joseph</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Saint Paul and Saint Peter</td> <td>Non-Recurrence</td> <td>Jun 28, 2016</td> <td>Jun 29, 2016</td> <td></td> <td>Saint Paul and Saint Peter</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Freedom Day</td> <td>Non-Recurrence</td> <td>Mar 30, 2016</td> <td>Mar 31, 2016</td> <td></td> <td>Freedom Day</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Christmas 2016</td> <td>Non-Recurrence</td> <td>Dec 24, 2016</td> <td>Dec 25, 2016</td> <td></td> <td>Christmas 2016</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Saturday</td> <td>Weekly</td> <td></td> <td></td> <td>Saturday</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Immaculate Conception</td> <td>Non-Recurrence</td> <td>Dec 7, 2015</td> <td>Dec 8, 2015</td> <td></td> <td>Immaculate Conception</td> </tr> <tr> <td><input type="checkbox"/></td> <td>New Years 2017</td> <td>Non-Recurrence</td> <td>Dec 31, 2016</td> <td>Jan 1, 2017</td> <td></td> <td>New Years 2017</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Victory Day</td> <td>Non-Recurrence</td> <td>Sep 7, 2016</td> <td>Sep 8, 2016</td> <td></td> <td>Victory Day</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Summer Shut Down 2016</td> <td>Non-Recurrence</td> <td>Aug 14, 2016</td> <td>Aug 19, 2016</td> <td></td> <td>Summer Shut Down 2016</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Labour Day</td> <td>Non-Recurrence</td> <td>Apr 30, 2016</td> <td>May 1, 2016</td> <td></td> <td>Labour Day</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Saint Pauls Shipwreck</td> <td>Non-Recurrence</td> <td>Feb 9, 2016</td> <td>Feb 10, 2016</td> <td></td> <td>Saint Paul's Shipwreck</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Christmas 2015</td> <td>Non-Recurrence</td> <td>Dec 24, 2015</td> <td>Dec 25, 2015</td> <td></td> <td>Christmas 2015</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Christmas Shut Down 2015</td> <td>Non-Recurrence</td> <td>Dec 22, 2015</td> <td>Jan 4, 2016</td> <td></td> <td>Christmas Shut Down 2015</td> </tr> </tbody> </table> | | | | <input type="checkbox"/> | Title | Frequency | Start Date | End Date | Day Number | Notes | <input type="checkbox"/> | Independence Day Malta | Non-Recurrence | Sep 20, 2016 | Sep 21, 2016 | | Independence Day Malta | <input type="checkbox"/> | Good Friday | Non-Recurrence | Mar 24, 2016 | Mar 25, 2016 | | Good Friday | <input type="checkbox"/> | Saint Joseph | Non-Recurrence | Mar 18, 2016 | Mar 19, 2016 | | Saint Joseph | <input type="checkbox"/> | Saint Paul and Saint Peter | Non-Recurrence | Jun 28, 2016 | Jun 29, 2016 | | Saint Paul and Saint Peter | <input type="checkbox"/> | Freedom Day | Non-Recurrence | Mar 30, 2016 | Mar 31, 2016 | | Freedom Day | <input type="checkbox"/> | Christmas 2016 | Non-Recurrence | Dec 24, 2016 | Dec 25, 2016 | | Christmas 2016 | <input type="checkbox"/> | Saturday | Weekly | | | Saturday | | <input type="checkbox"/> | Immaculate Conception | Non-Recurrence | Dec 7, 2015 | Dec 8, 2015 | | Immaculate Conception | <input type="checkbox"/> | New Years 2017 | Non-Recurrence | Dec 31, 2016 | Jan 1, 2017 | | New Years 2017 | <input type="checkbox"/> | Victory Day | Non-Recurrence | Sep 7, 2016 | Sep 8, 2016 | | Victory Day | <input type="checkbox"/> | Summer Shut Down 2016 | Non-Recurrence | Aug 14, 2016 | Aug 19, 2016 | | Summer Shut Down 2016 | <input type="checkbox"/> | Labour Day | Non-Recurrence | Apr 30, 2016 | May 1, 2016 | | Labour Day | <input type="checkbox"/> | Saint Pauls Shipwreck | Non-Recurrence | Feb 9, 2016 | Feb 10, 2016 | | Saint Paul's Shipwreck | <input type="checkbox"/> | Christmas 2015 | Non-Recurrence | Dec 24, 2015 | Dec 25, 2015 | | Christmas 2015 | <input type="checkbox"/> | Christmas Shut Down 2015 | Non-Recurrence | Dec 22, 2015 | Jan 4, 2016 | | Christmas Shut Down 2015 |
| <input type="checkbox"/> | Title | Frequency | Start Date | End Date | Day Number | Notes | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Independence Day Malta | Non-Recurrence | Sep 20, 2016 | Sep 21, 2016 | | Independence Day Malta | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Good Friday | Non-Recurrence | Mar 24, 2016 | Mar 25, 2016 | | Good Friday | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Saint Joseph | Non-Recurrence | Mar 18, 2016 | Mar 19, 2016 | | Saint Joseph | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Saint Paul and Saint Peter | Non-Recurrence | Jun 28, 2016 | Jun 29, 2016 | | Saint Paul and Saint Peter | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Freedom Day | Non-Recurrence | Mar 30, 2016 | Mar 31, 2016 | | Freedom Day | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Christmas 2016 | Non-Recurrence | Dec 24, 2016 | Dec 25, 2016 | | Christmas 2016 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Saturday | Weekly | | | Saturday | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Immaculate Conception | Non-Recurrence | Dec 7, 2015 | Dec 8, 2015 | | Immaculate Conception | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | New Years 2017 | Non-Recurrence | Dec 31, 2016 | Jan 1, 2017 | | New Years 2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Victory Day | Non-Recurrence | Sep 7, 2016 | Sep 8, 2016 | | Victory Day | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Summer Shut Down 2016 | Non-Recurrence | Aug 14, 2016 | Aug 19, 2016 | | Summer Shut Down 2016 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Labour Day | Non-Recurrence | Apr 30, 2016 | May 1, 2016 | | Labour Day | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Saint Pauls Shipwreck | Non-Recurrence | Feb 9, 2016 | Feb 10, 2016 | | Saint Paul's Shipwreck | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Christmas 2015 | Non-Recurrence | Dec 24, 2015 | Dec 25, 2015 | | Christmas 2015 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Christmas Shut Down 2015 | Non-Recurrence | Dec 22, 2015 | Jan 4, 2016 | | Christmas Shut Down 2015 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

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A calendar can be linked to one or more locations

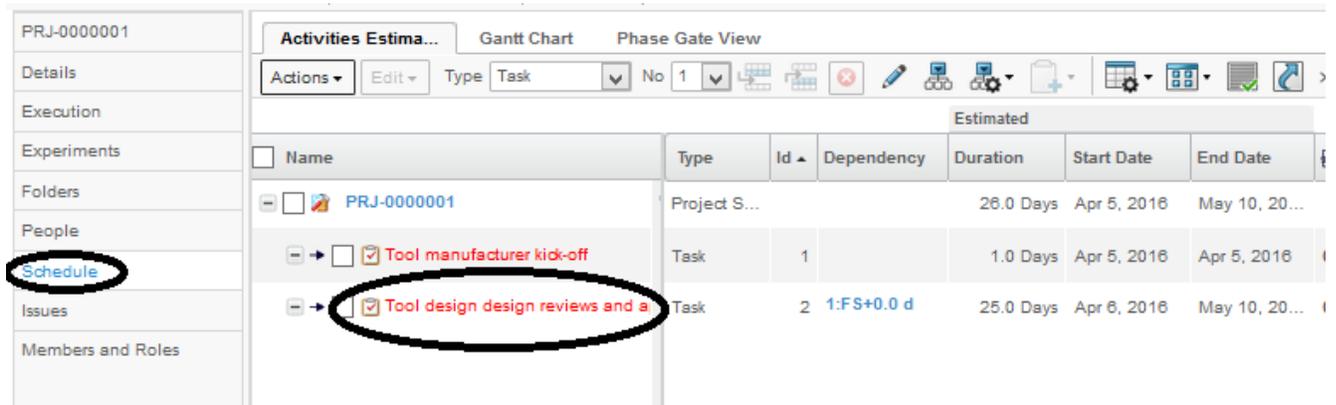


The project scheduling is implemented using the project owner calendar.

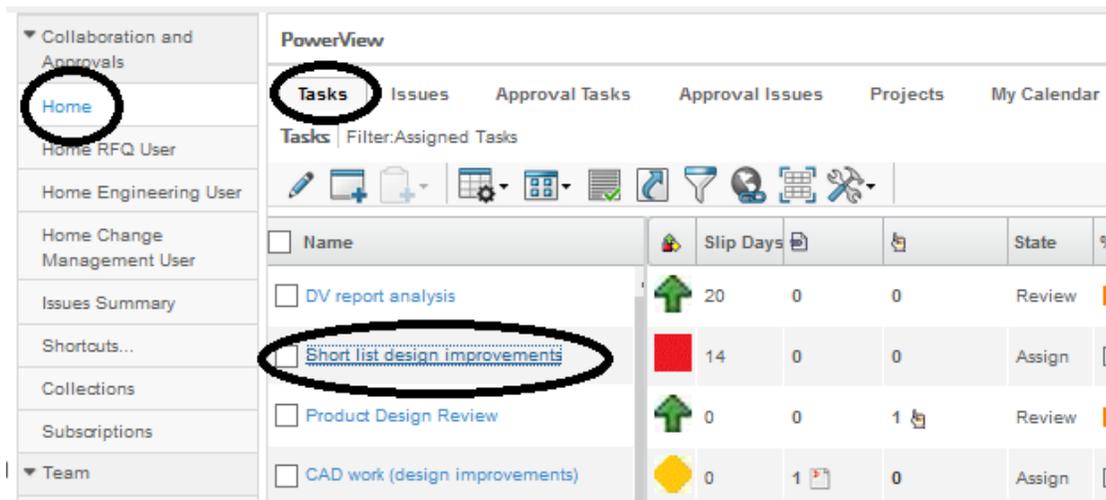
The project owner, project lead and the task assignees are able to define a specific calendar for a task.

Step 1 Select the task

Project owner and project lead can select the task from schedule view



Task assignees can select the task from Tasks table



| | | | |
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Step 2 Select Property command and select Edit command

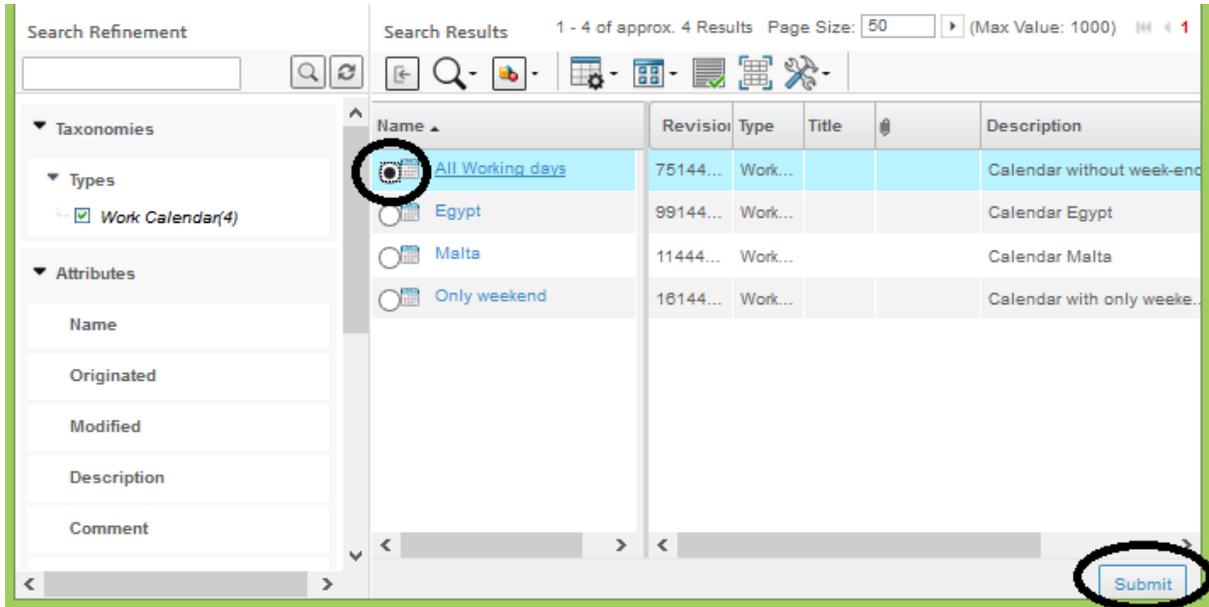
| | |
|-----------------------------|--|
| Tool design design revie... | Properties Lifecycle History |
| Assignees | Edit Task Preference...    |
| Issues | Project Space Name PRJ-0000001 |
| Collaboration | Task Name Tool design design reviews and approval from Customer |
| Deliverables | Policy Project Task |
| Dependencies | Owner Barbara, Johann |
| Properties | Brief Description TDR's signed and approved PD managing principal |
| Routes & Approvals | State Create |
| | Creation Date Apr 5, 2016 |
| | Task Constraint Type As Soon As Possible Task Constraint Date |
| | Estimated Start Date Apr 6, 2016 Actual Start Date |
| | Estimated Finish Date May 10, 2016 Actual Finish Date |
| | Estimated Duration 25.0 Days Actual Duration 0.0 Days |
| | Calendar |
| | Project Role TE Tooling Engineer |
| | Cost |

Step 3 Select icon “...” related to field Calendar

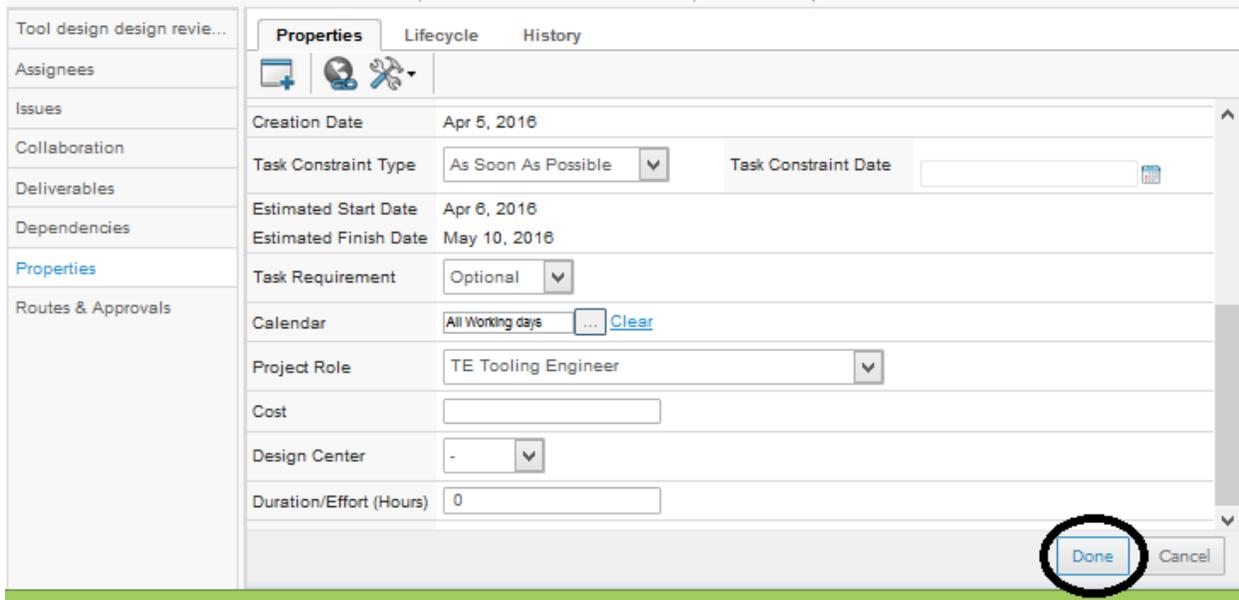
| |
|---|
| Properties Lifecycle History |
|    |
| Creation Date Apr 5, 2016 |
| Task Constraint Type As Soon As Possible  Task Con |
| Estimated Start Date Apr 6, 2016 |
| Estimated Finish Date May 10, 2016 |
| Task Requirement Optional  |
| Calendar   Clear |
| Project Role TE Tooling Engineer |
| Cost |

| | | | |
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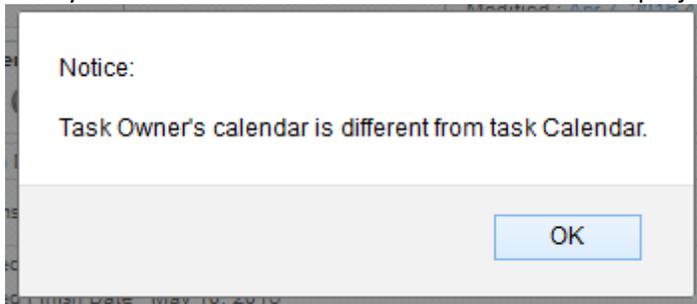
Step 4 The system opens a window with all calendar defined; the user has to select the calendar to be assigned to task and select Submit



Step 5 Save the changes



The system alerts that task calendar is different from project owner calendar



| | | | |
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The system updates the task estimated finish date and calendar fields

| | |
|-----------------------|---------------------|
| Task Constraint Type | As Soon As Possible |
| Estimated Start Date | Apr 6, 2016 |
| Estimated Finish Date | May 10, 2016 |
| Estimated Duration | 25.0 Days |
| Calendar | |
| Project Role | TE Tooling Engineer |
| Cost | |

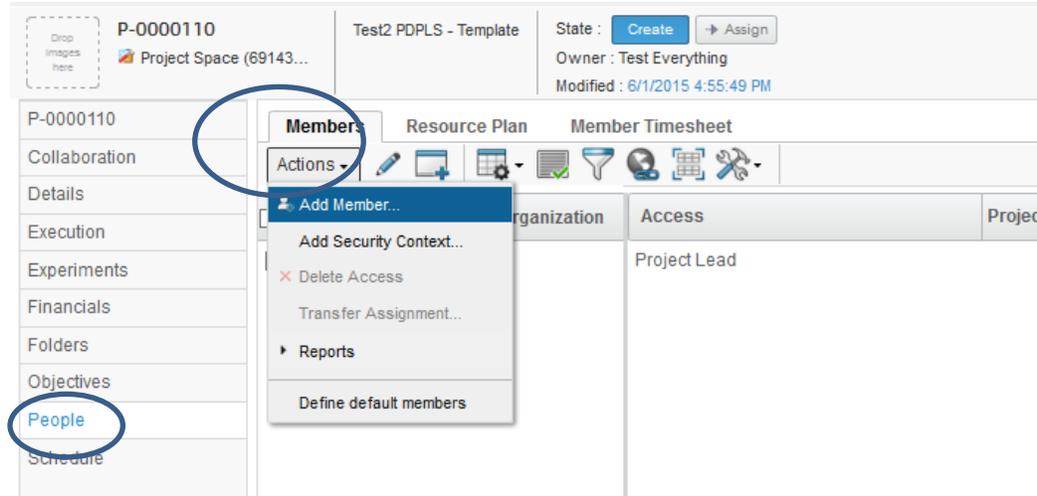
| | |
|-----------------------|---------------------|
| Estimated Start Date | Apr 6, 2016 |
| Estimated Finish Date | Apr 30, 2016 |
| Estimated Duration | 25.0 Days |
| Calendar | All Working days |
| Project Role | TE Tooling Engineer |
| Cost | |

| | | | |
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1.8 Project members definition

1.8.1 Member definition

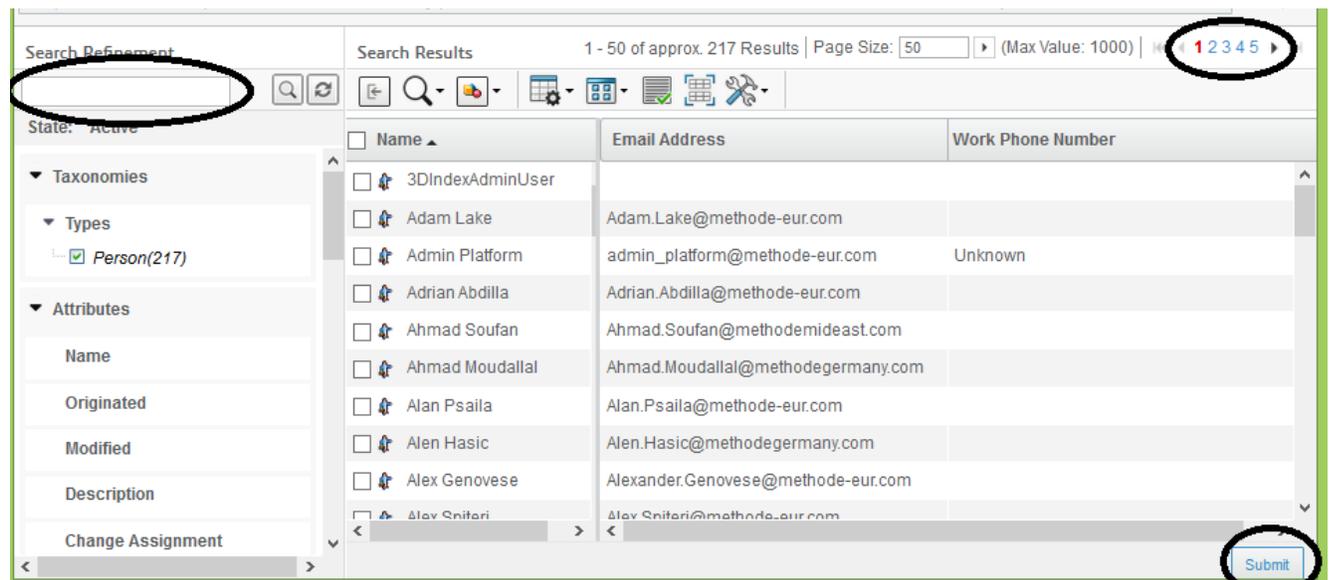
Project Lead adds members to the project using the command “Add Member”, under the Actions menu.



The Project Lead has to select the people from the query table results and select command Submit; the user can refine the search using the attributes.

The table shows the first list of people: Project Lead can use the pagination feature in order to change the page size or view the following pages.

If user changes the page, the previous selection is removed; the user has to select the user and select Submit for each page.

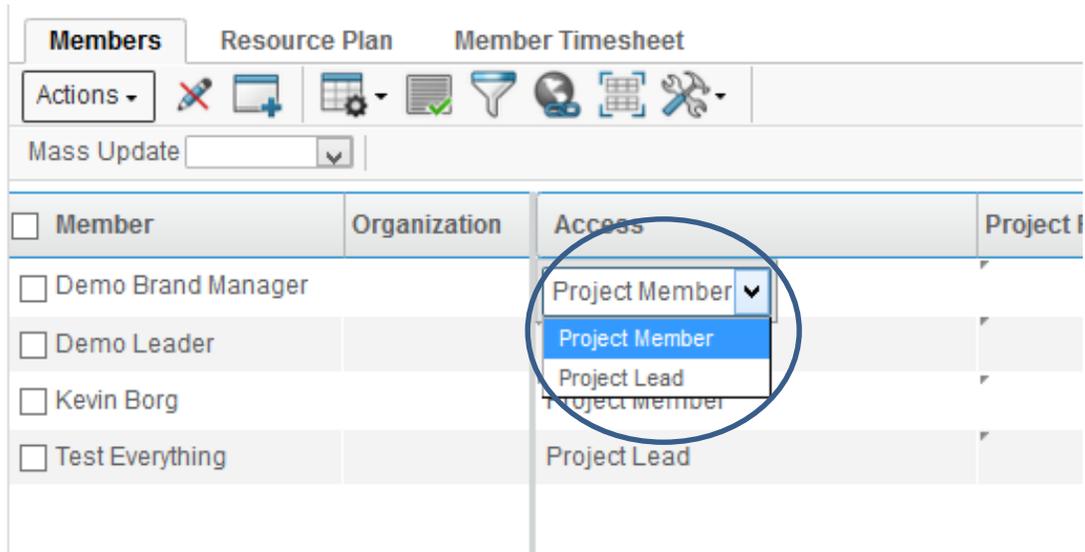


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1.8.2 Project member access level

The Project Lead set up the project members access level:

- Project Member: can view project information but can't modify it. A Project member can manage its tasks and deliverables
- Project Lead: can view and edit project information; it's like the project owner but he can't delete the project or transfer the ownership



The screenshot shows a software interface with three tabs: 'Members', 'Resource Plan', and 'Member Timesheet'. Below the tabs is a toolbar with an 'Actions' dropdown and several icons. A 'Mass Update' dropdown is also visible. The main area contains a table with columns: 'Member', 'Organization', 'Access', and 'Project ID'. The 'Access' column for the first row is open, showing a dropdown menu with options: 'Project Member' (selected), 'Project Member', 'Project Lead', and 'Project member'. A blue circle highlights the dropdown menu.

| Member | Organization | Access | Project ID |
|---|--------------|----------------|------------|
| <input type="checkbox"/> Demo Brand Manager | | Project Member | |
| <input type="checkbox"/> Demo Leader | | Project Member | |
| <input type="checkbox"/> Kevin Borg | | Project Lead | |
| <input type="checkbox"/> Test Everything | | Project member | |

| | | | |
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1.8.3 Project roles

The Project Lead set up the project members role; a project role doesn't affect the project access but is used to define task assignees. User has to select Edit icon and assign a project role for project members

| Members | | | | |
|--------------------------|--------------------|----------------|--|------|
| Actions | | | | |
| Member | Organization | Access | Project Role | Com |
| <input type="checkbox"/> | METHODE ELEC. | Project Member | | Mult |
| <input type="checkbox"/> | Alexander Galea | Project Member | PDE Senior Product Design Engineer | Mult |
| <input type="checkbox"/> | Allen Carl Bonnici | Project Member | EE Senior Product Electronics Engin... | Mult |
| <input type="checkbox"/> | Anabel Cutajar | Project Member | LT Lab Technician | Mult |
| <input type="checkbox"/> | Angelo Scerri | Project Member | TE Tooling Engineer | Mult |
| <input type="checkbox"/> | Anthony Caruana | Project Member | | Mult |
| <input type="checkbox"/> | Elias Moussa | Project Lead | | Mult |
| <input type="checkbox"/> | Johann Barbara | Project Lead | LM Launch Manager | Mult |
| <input type="checkbox"/> | Joseph Zammit | Project Lead | LM Launch Manager | Mult |
| <input type="checkbox"/> | Kevin Borg | Project Member | AM Account Manager | Mult |

Project Role drop down list:

| | | |
|---|---|--------------------------------------|
| AM Account Manager | IP Intellectual Property | PURCH Senior Purchasing |
| AM Senior Account Manager | IP Senior Intellectual Property | QE Quality Engineer |
| BPD Business Process and Documentation | LM Launch Manager | QE Senior Quality Engineer |
| BPD Senior Business Process and Documentation | LM Senior Launch Manager | QM Quoting Manager |
| CA Cost Analyst | LT Lab Technician | QM Senior Quoting Manager |
| CA Senior Cost Analyst | LT Senior Lab Technician | S Sales |
| CC Change Coordinator | ME Manufacturing Engineer | S Senior Sales |
| CC Senior Change Coordinator | ME Senior Manufacturing Engineer | SE Senior Systems Engineer |
| Core Team Member | MET Metrology | SE Systems Engineer |
| CS Customer Service | MET Senior Metrology | SQE Senior Supplier Quality Engineer |
| CS Senior Customer Service | OM Operations Manager | SQE Supplier Quality Engineer |
| Design Engineer | OM Senior Operations Manager | TE Senior Tooling Engineer |
| EE Product Electronics Engineer | PDE Product Design Engineer | TE Tooling Engineer |
| EE Senior Product Electronics Engineer | PDE Senior Product Design Engineer | WM Senior Warranty Engineer |
| Fin Finance | PPAP Production Approval Process | WM Warranty Engineer |
| Fin Senior Finance | PPAP Senior Production Approval Process | |
| Financial Reviewer | Program Manager | |
| GM General Manager | Project Assessor | |
| GM Senior General Manager | Project Lead | |
| IP Intellectual Property | PURCH Purchasing | |

| | | | |
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1.8.4 Document Approver Roles

Project Lead has to define project members selecting all people involved in project execution; since the tasks and documents contained in tasks can be approved (see chapter “Tasks Approval” and chapter “Working with Deliverables”), Project Lead has to add also users responsible to approve them.

Similar to previous case, user has to select Edit icon and assign a Document Approver Role for project members involved in document approval.

| Member | Organization | Class | Project Role | Comments | Is Core Team Member | Document Approver Role |
|---|---------------|----------------|------------------------|------------------------|---------------------|--------------------------|
| <input type="checkbox"/> | METHODE ELEC. | Project Member | | Multiple Ownership ... | | |
| <input type="checkbox"/> Alexander Galea | | Project Member | PDE Senior Product ... | Multiple Ownership ... | FALSE | |
| <input type="checkbox"/> Allen Carl Bonnici | | Project Member | EE Senior Product E... | Multiple Ownership ... | FALSE | |
| <input type="checkbox"/> Anabel Cutajar | | Project Member | LT Lab Technician | Multiple Ownership ... | FALSE | LT Senior Lab Technician |
| <input type="checkbox"/> Angelo Soerri | | Project Member | TE Tooling Engineer | Multiple Ownership ... | FALSE | |
| <input type="checkbox"/> Anthony Caruana | | Project Member | | Multiple Ownership ... | FALSE | |
| <input type="checkbox"/> Elias Moussa | | Project Lead | | Multiple Ownership ... | FALSE | |
| <input type="checkbox"/> Johann Barbara | | Project Lead | LM Launch Manager | Multiple Ownership ... | FALSE | LM Senior Launch Mana... |

1.8.5 Core Team member

Project can govern the product and the variants that belong to product (see chapter “Product Definition”). Core Team members are the people notified when a part or a drawing, contained in the product variants, are released.

User has to select Edit icon and select the users defined as Core Team Member.

| Member | Organization | Class | Project Role | Comments | Is Core Team Member |
|---|---------------|----------------|------------------------|------------------------|---------------------|
| <input type="checkbox"/> | METHODE ELEC. | Project Member | | Multiple Ownership ... | |
| <input type="checkbox"/> Alexander Galea | | Project Member | PDE Senior Product ... | Multiple Ownership ... | TRUE |
| <input type="checkbox"/> Allen Carl Bonnici | | Project Member | EE Senior Product E... | Multiple Ownership ... | FALSE |
| <input type="checkbox"/> Anabel Cutajar | | Project Member | LT Lab Technician | Multiple Ownership ... | TRUE |
| <input type="checkbox"/> Angelo Soerri | | Project Member | TE Tooling Engineer | Multiple Ownership ... | FALSE |
| <input type="checkbox"/> Anthony Caruana | | Project Member | | Multiple Ownership ... | FALSE |

| | | | |
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1.8.6 Check project roles and members

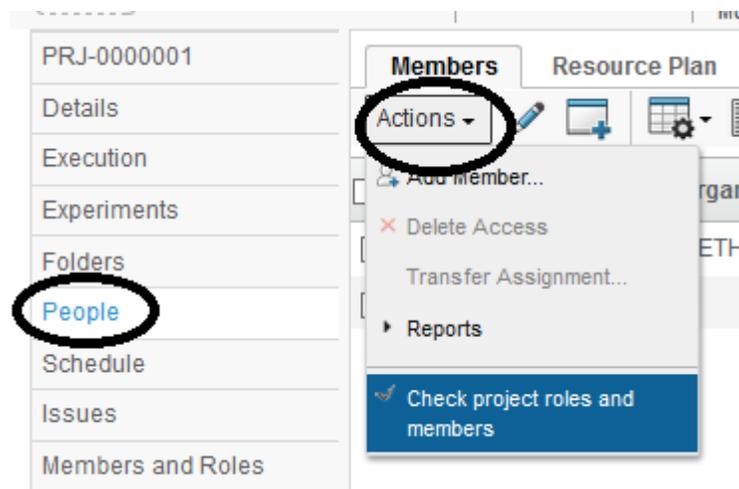
Project Lead has to define the tasks assignees; in order to assign the tasks, Project Lead can use the function Assign By Role, that use the project role information (project role can be inherited from project template or can be entered manually by project lead, see chapter “Project Role Definition” in “Project Template” and chapter “Work Breakdown Structure” in “Project Space Management”).

Project Lead has to define, if necessary, the document approver role for the documents contained in the tasks as deliverables; in order to define the document approver, Project Lead can use the function People and define the person as approver (see previous chapter).

The function performs two checks:

- Scans all tasks and retrieves the project role: if defined, there must be at least one user assigned with that project role. If a task has a project role and there is no users assigned to it, an error message is prompted
- Scans all tasks, retrieves all documents contained in tasks as deliverables, retrieves the document approver role: if defined, there must be at least one user assigned with that document approver role. If a document has a document approver role and there is no users assigned to it, an error message is prompted

User has to select command “Check project roles and members” in Action menu in command People



The system opens a window with all tasks with a project role not assigned and all documents with a Document Approver role not assigned to a user.

| | | | |
|---------|----------|-------|------------------|
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To understand the checks performed, follows this example

A project has tasks with project role defined

| Name | Duration | Start Date | End Date | Project Role |
|---|----------|------------|----------|---------------------|
| PRJ-0000001 | 0.0 | | | |
| Tool manufacturer kick-off | 0.0 | | | TE Tooling Engineer |
| Tool design design reviews and approval | 0.0 | | | TE Tooling Engineer |

The tasks can have documents created by project lead or retrieved from template

| Name | Duration | Start Date | End Date | Documents | Actions |
|---|----------|--------------|---------------|-----------|---------|
| PRJ-0000001 | 2.0 Days | Apr 5, 2016 | May 18, 20... | 0 | |
| Tool manufacturer kick-off | 7.0 Days | Apr 5, 2016 | Apr 13, 2016 | 3 | |
| Tool design design reviews and approval | 5.0 Days | Apr 14, 2016 | May 18, 20... | 0 | |

The documents can have a Document Approver Role defined

| Name | Title | Rev | Ver | Type | Description | Document Approver Role |
|---------------------------|--------------|-----|-----|----------|--------------|----------------------------|
| Tool new doc-179866563089 | Tool new doc | 0 | 1 | Document | Tool new doc | DE Senior Design Engineer |
| Tool spec-159866562277 | Tool spec | 0 | 1 | Document | Tool spec | TE Senior Tooling Engineer |
| Tool spec-199866563448 | Tool spec | 0 | 1 | Document | Tool spec | TE Senior Tooling Engineer |

The Project Lead has to define project members and define project role and document approver role

| Member | Organization | Project Role | Comments | Is Core Team Member | Document Approver Role |
|----------------|---------------|--------------|-------------------------------|---------------------|------------------------|
| | METHODE ELEC. | | Multiple Ownership For Object | | |
| Johann Barbara | | | Multiple Ownership For Object | FALSE | |

The system scans all tasks and retrieves the project role; after checks if there is at least one user with the project role.

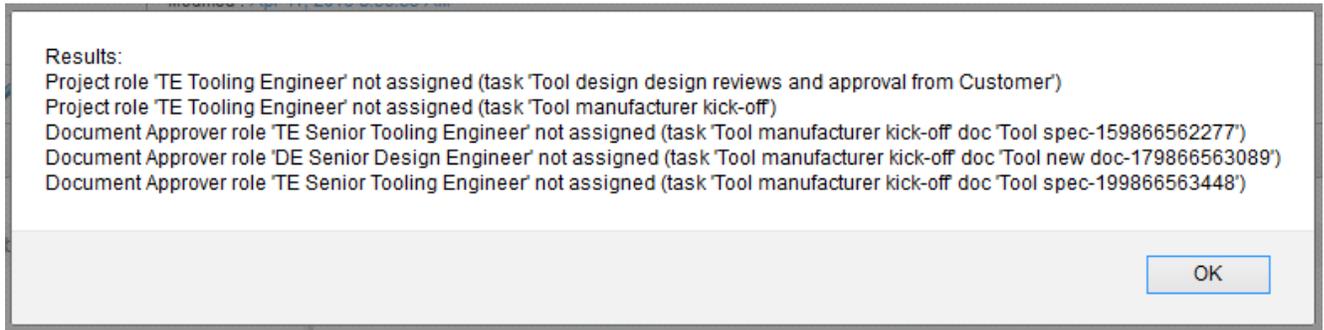
In the example, the tasks are defined to be assigned to role "TE Tooling Engineer" but there are no users with the project role.

The system scans all documents contained in tasks as deliverables and retrieves the document approver role; after checks if there is at least one user with the document approver role.

| | | | |
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In the example, the documents are defined to be approved by roles “TE Senior Tooling Engineer” and “DE Senior Design Engineer” but there are no users with the document approver role.

The system opens a window with the following errors:



The first two rows are related to tasks: the format is
 “Project role ‘<Role Name>’ not assigned (task ‘<Task Name>’)”

Project role 'TE Tooling Engineer' not assigned (task 'Tool design design reviews and approval from Customer')
 Project role 'TE Tooling Engineer' not assigned (task 'Tool manufacturer kick-off')

The last three rows are related to documents: the format is
 “Document Approver role ‘<Document Approver Role Name>’ not assigned (task ‘<Task Name>’)

Document Approver role 'TE Senior Tooling Engineer' not assigned (task 'Tool manufacturer kick-off' doc 'Tool spec-159866562277')
 Document Approver role 'DE Senior Design Engineer' not assigned (task 'Tool manufacturer kick-off' doc 'Tool new doc-179866563089')
 Document Approver role 'TE Senior Tooling Engineer' not assigned (task 'Tool manufacturer kick-off' doc 'Tool spec-199866563448')

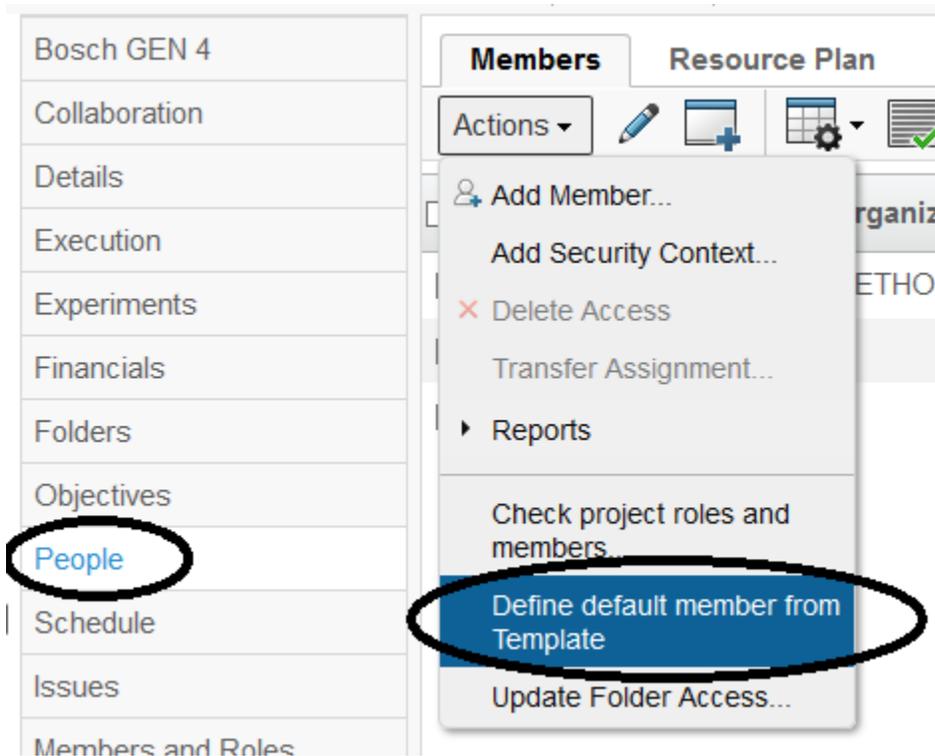
1.8.7 Define default members from template

Project can be created from a template; Project Administrator can define the tasks assignees at template level (see chapter “Task assignees definition”). If the template used to create the Project has tasks assignees defined, Project Lead can use the function Define default members from template to define the project members.

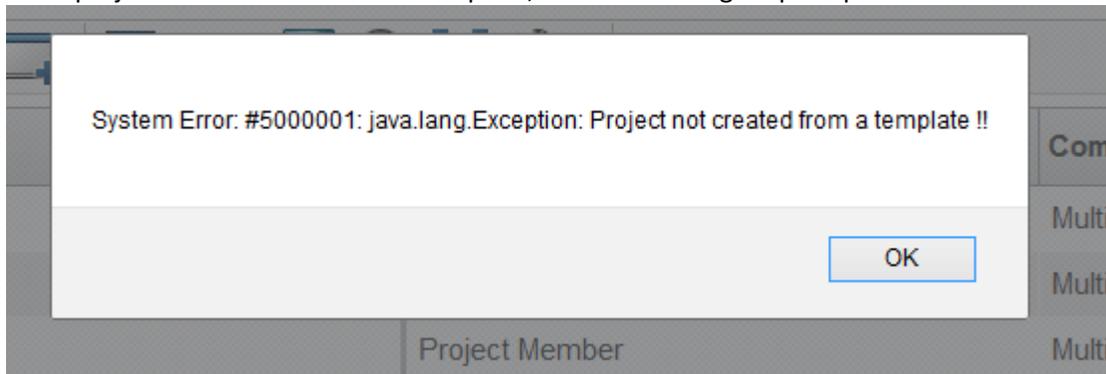
The function, other than define the project members, defines also the project role for each users, using the definition contained in the template.

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User has to select command “Define default members from Template” in Action menu in command People



If the project is not created from a template, an error message is prompted

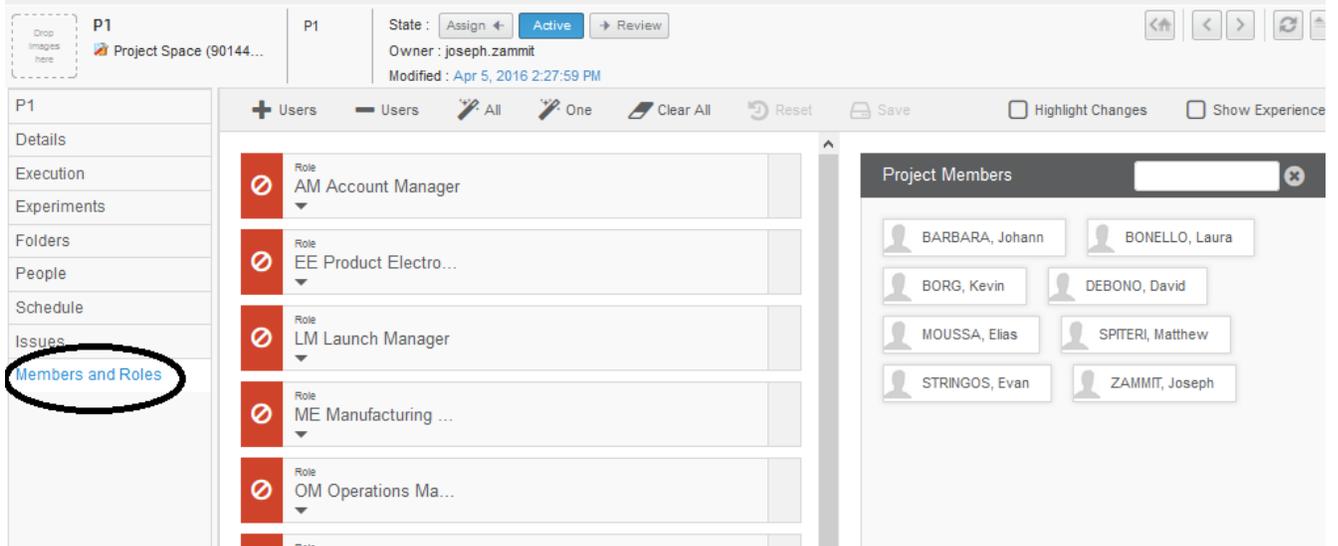


If the project is created from a template, the members are defined

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1.9 Members and Roles

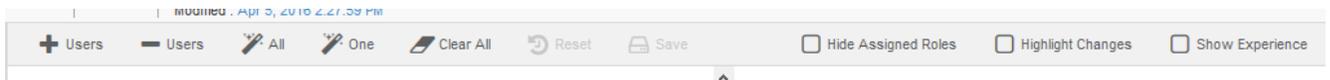
Project Lead can assign project role to members using the function Member and Roles



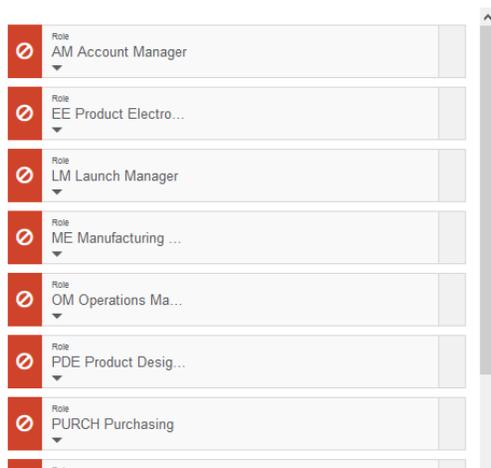
The function allows Project Lead to add and remove people as project members, assign a project role to users, check which are project roles not yet assigned

The page is composed by three portions:

- The header contains the functions to manage users and project roles

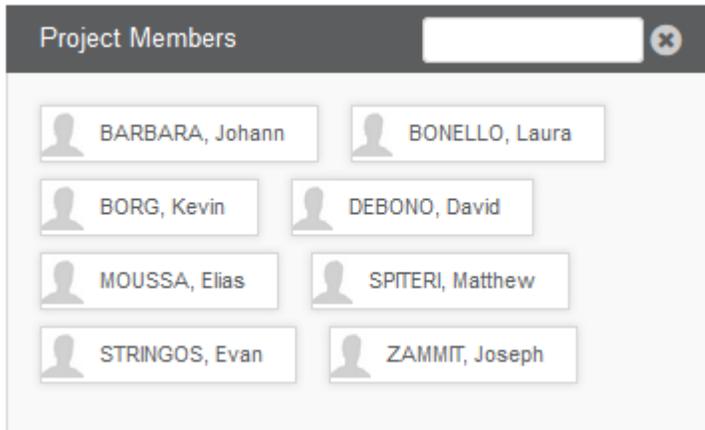


- The left side shows the project roles defined in project tasks (retrieved from project template used to create the project)



- The right side shows the current project members

| | | | |
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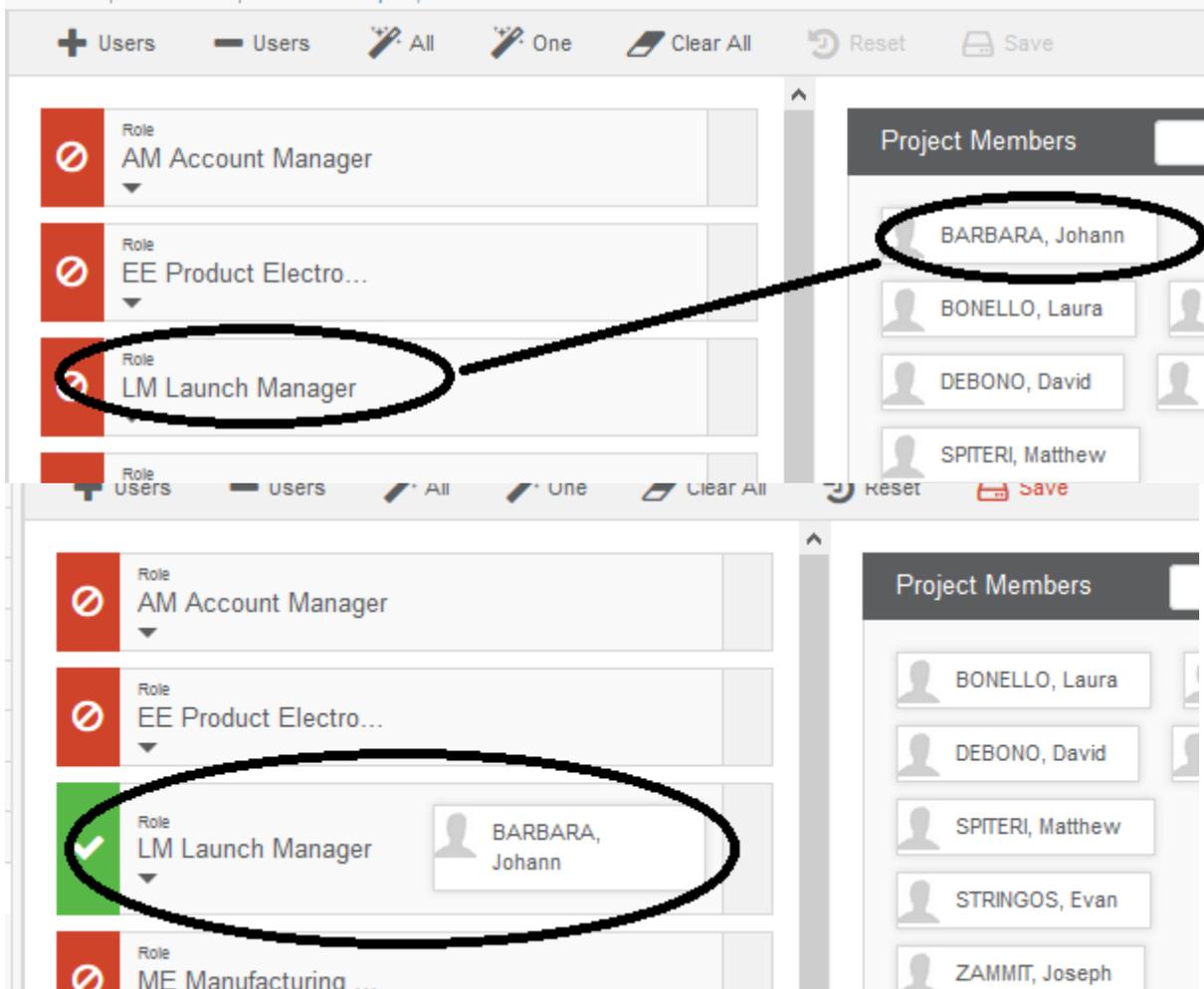
The functions available in the toolbar are:

-  Users : allows to add other people as project member.
-  Users : allows to remove people from project members list
-  Clear All : remove all project roles assignment
-  All : assign the users to the given roles automatically, based on previous project role assignment.
-  One : similar to previous; the difference between All and One is that “One” will continue with the next role once one user has been located with the required experience, whereas All will put all users with the given experience to the matching role
-  Reset : discard all changes not saved (icon is highlighted only when there is a change)
-  Save : save all changes (icon is highlighted only when there is a change)
- Hide Assigned Roles : in project roles side, hide all project roles that has at least one user assigned
- Highlight Changes : in the project roles side, highlight all changes not yet saved
- Show Experience : in the project members side, show the project roles assigned using command Member

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Assign a project role to a user

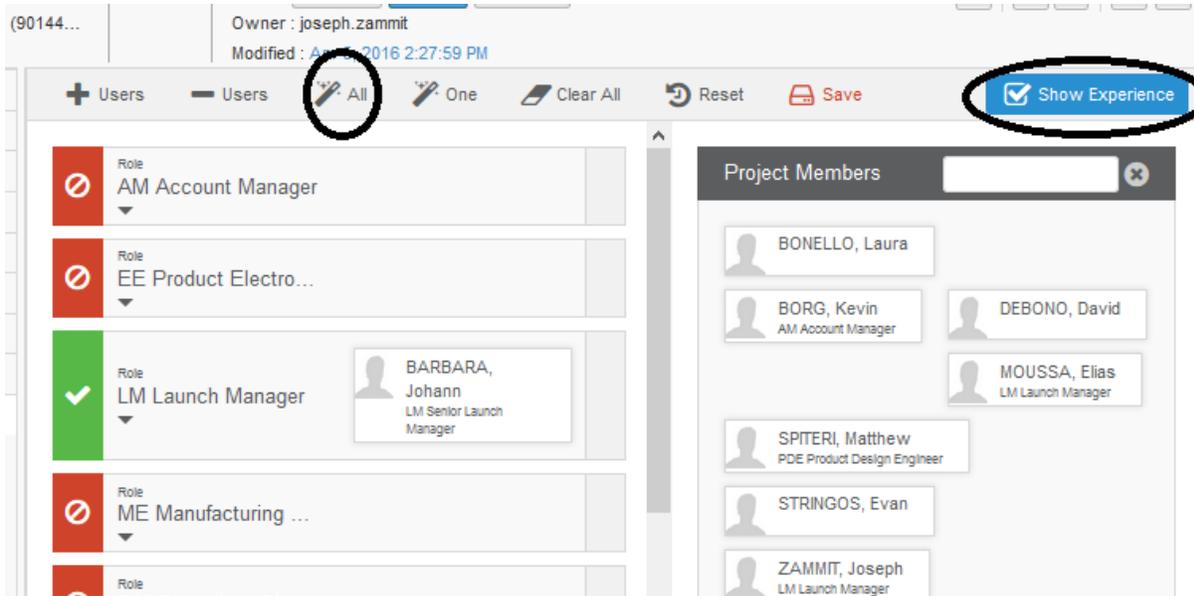
In order to assign a user to a project role, the Project Lead can drag the users from project members side to project role side



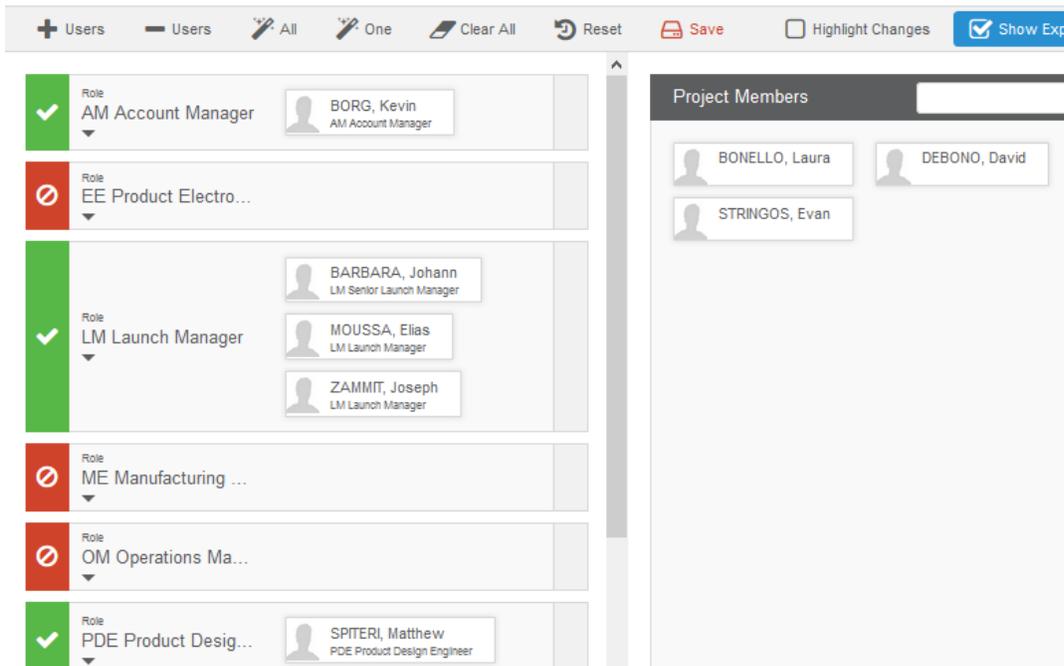
| | | | |
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| Status | Released | | 32 |

Assign all project roles using users Experience

The function  assigns the users to project roles using project roles assigned in command Members; select command  in order to shows current assignment

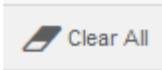


After selecting the command , all users with a project role contained in project definition are assigned to project role.



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Remove project roles assignment

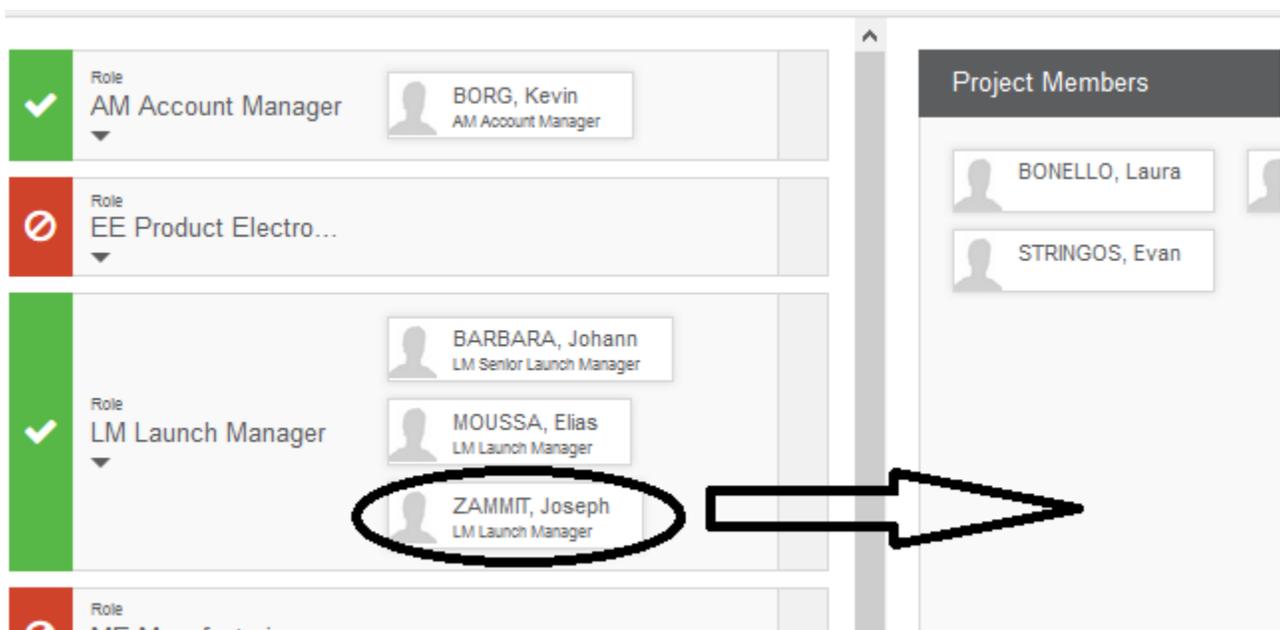


The function removes all project roles assignment

Each project role cell has an icon to remove users assignment



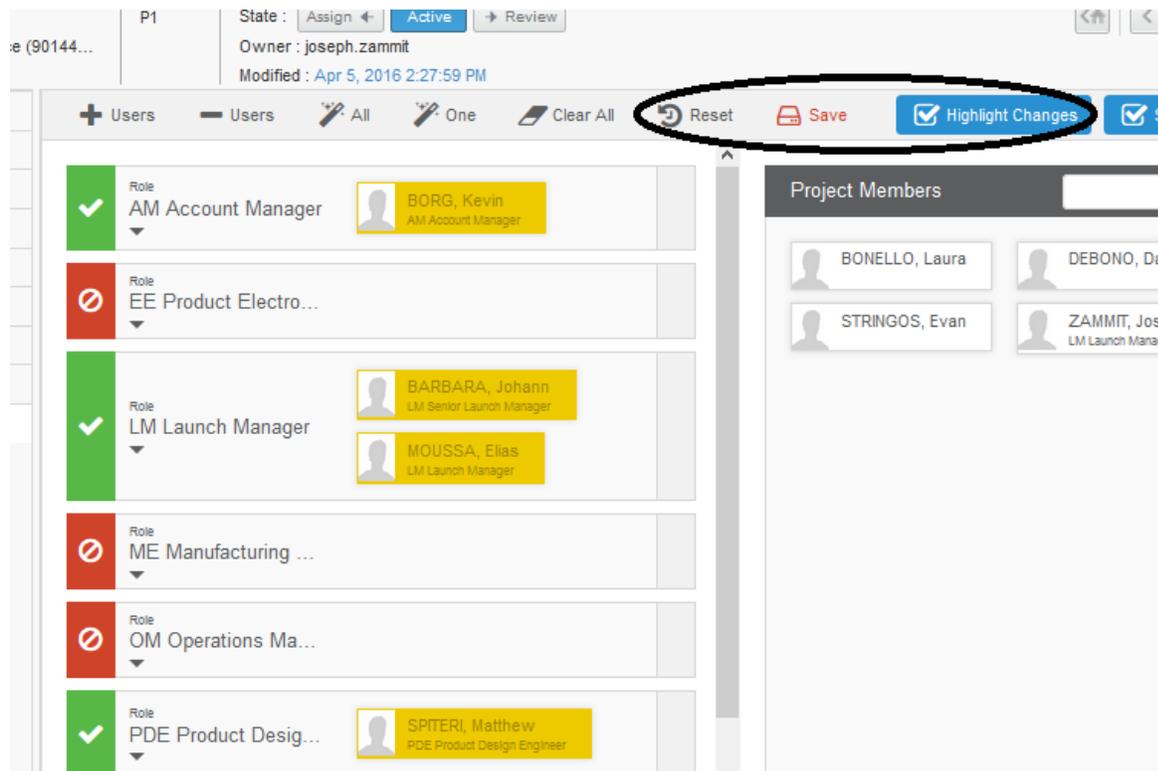
The Project Lead can drag the users from project role side to project member side



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Save project roles assignment

The function Highlight Changes highlights all changes not yet saved



The function saves all changes (page Members is updated)

| Members | | | | |
|--|--------------|----------------|---------------------------|--------|
| Member | Organization | Access | Project Role | Comm |
| <input type="checkbox"/> David Debono | | Project Member | | Multip |
| <input type="checkbox"/> Elias Moussa | | Project Member | LM Launch Manager | Multip |
| <input type="checkbox"/> Evan Stringos | | Project Member | | Multip |
| <input type="checkbox"/> Johann Barbara | | Project Lead | LM Launch Manager | Multip |
| <input type="checkbox"/> Joseph Zammit | | Project Lead | - | Multip |
| <input type="checkbox"/> Kevin Borg | | Project Member | AM Account Manager | Multip |
| <input type="checkbox"/> Laura Bonello | | Project Member | | Multip |
| <input type="checkbox"/> Matthew Spiteri | | Project Member | PDE Product Design Eng... | Multip |

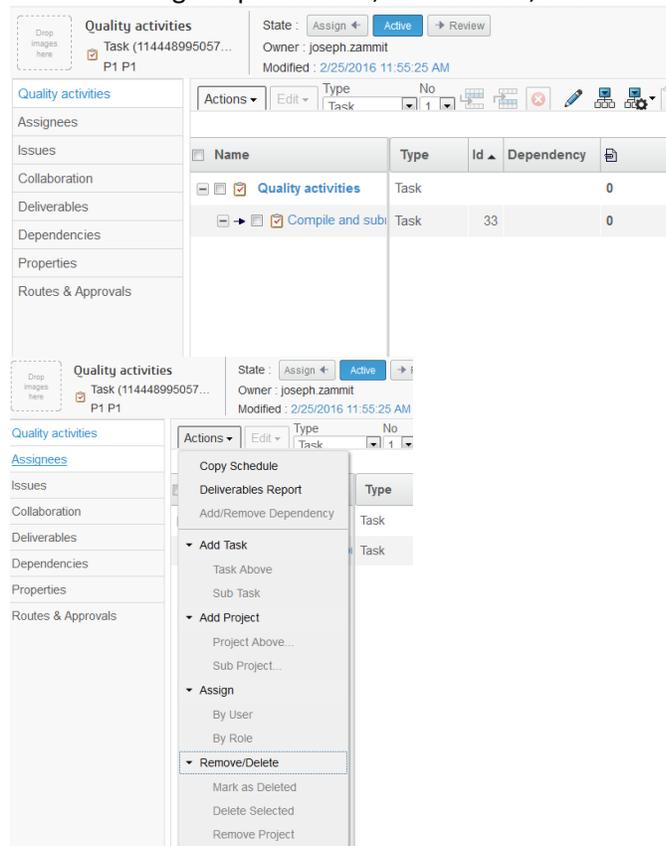
| | | | |
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| Version | 7 | Date: | 28-November-2017 |
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1.10 Assigning Tasks

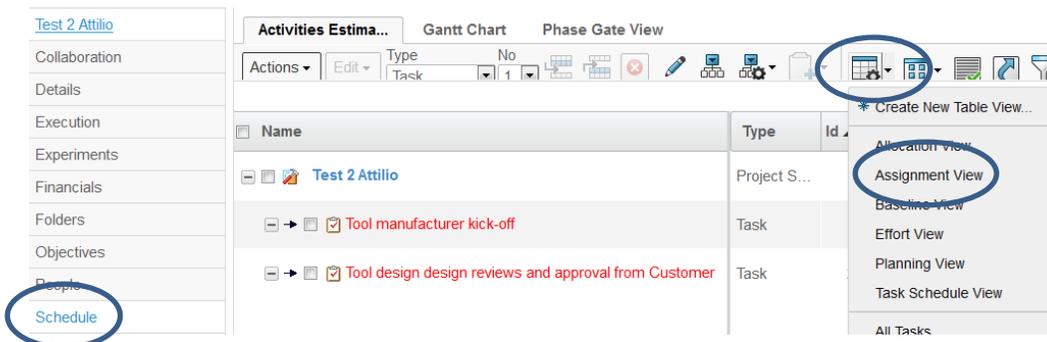
The Project Lead assigns WBS tasks to the project members.

Task assignees can:

- view their task and its subtasks
- add subtasks for the task
- edit the task and any of its subtasks they are assigned to, including the % complete and actual finish date
- route the task for approval process
- add and remove assignees, including removing themselves, which in effect delegates the task
- manage dependencies, deliverables, and risks for the task



The Project Lead assigns the tasks activating the Assignment View from Schedule toolbar



| | | | |
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Select the cell under the column that corresponds to the user you want to assign the task, the system shows the icon Assigned, in the same way you can unselect the cell to remove the assignment. Note that this function sets the allocation to 100%.

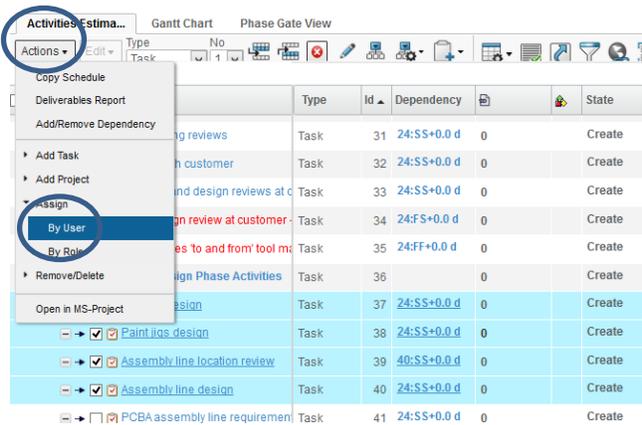
The screenshot shows a software interface for project management. At the top, there are tabs for 'Activities Estima...', 'Gantt Chart', and 'Phase Gate View'. Below the tabs is a toolbar with various icons. The main area is a table with the following columns: Name, Type, %, Progress, Duration, End Date, Owner, and Project Members % Allocation. The 'Project Members % Allocation' column contains icons for 'Kevin BORG' and 'Demo BRAND MANA'. Several tasks in the list have an 'Assigned' button next to them, indicating they are assigned to a user. The 'Assigned' button is highlighted with a blue circle in the screenshot.

| Name | Type | % | Progress | Duration | End Date | Owner | Project Members % Allocation |
|-------------------------------------|-------|-----|----------|-----------|-------------|---------------|------------------------------|
| PLS PHASE 1 - Program Release and | Phase | 0.0 | | 360.0 ... | Nov 11, ... | Test Every... | |
| Manage the Project Tasks | Task | 0.0 | | 360.0 ... | Nov 11, ... | Test Every... | |
| Project Communication External | Task | 0.0 | | 300.0 ... | Aug 19, ... | Test Every... | Assigned |
| Project Communication Internal - | Task | 0.0 | | 360.0 ... | Nov 11, ... | Test Every... | Assigned |
| Project Communication Internal - | Task | 0.0 | | 360.0 ... | Nov 11, ... | Test Every... | Assigned |
| Project Management / Admin | Task | 0.0 | | 360.0 ... | Nov 11, ... | Test Every... | Assigned |
| Project Kick-Off by customer - SOW | Task | 0.0 | | 0.0 Days | Jul 1, 2015 | Test Every... | |
| Project Kick-off MEM - PRF issued a | Task | 0.0 | | 5.0 Days | Jul 7, 2015 | Test Every... | |
| Kick-off meeting at customer | Task | 0.0 | | 1.0 Days | Jul 1, 2015 | Test Every... | |
| Product Design Phase Activities | Task | 0.0 | | 97.0 D... | Nov 13, ... | Test Every... | |
| Methode recieves all design data | Task | 0.0 | | 30.0 D... | Aug 12, ... | Test Every... | Assigned |
| Submit latest A surface to Custom | Task | 0.0 | | 1.0 Days | Aug 13, ... | Test Every... | Assigned |

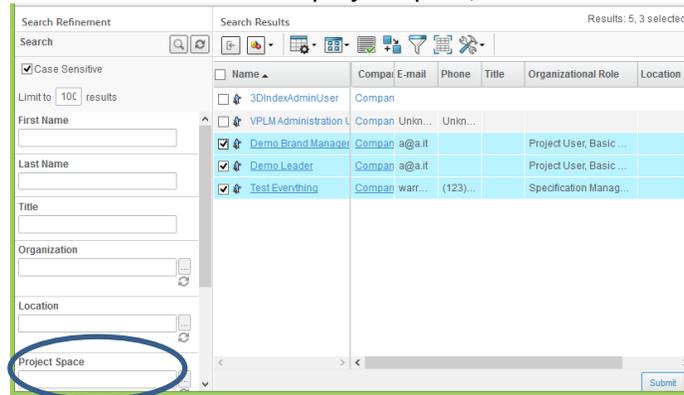
| | | | |
|---------|----------|-------|------------------|
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1.10.1 Assigning Tasks By User

Select the tasks to be assigned; select Assign By User from Actions menu



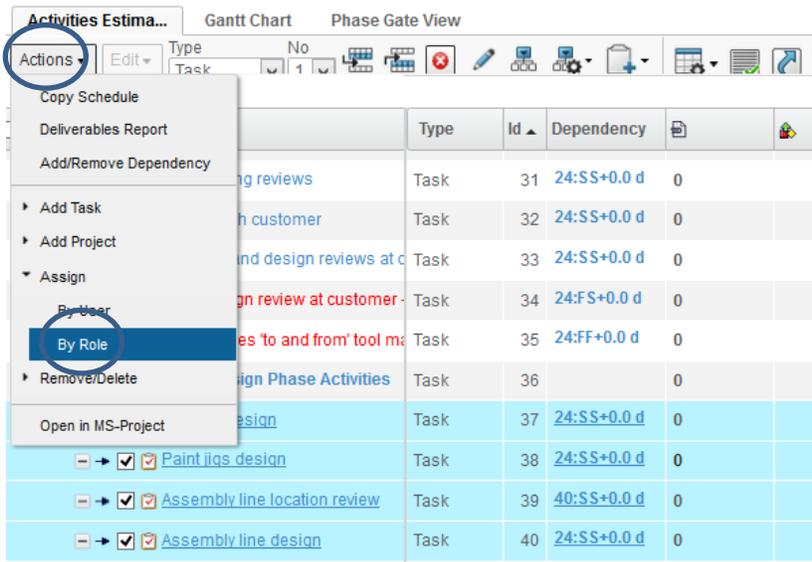
Select the user/s defined as project member or Organization member (see Project Visibility). This function sets the allocation to 100%. If the field Project Space is not empty, the result of the search is limited to the members of the selected project space, otherwise the result list all the users in the system.



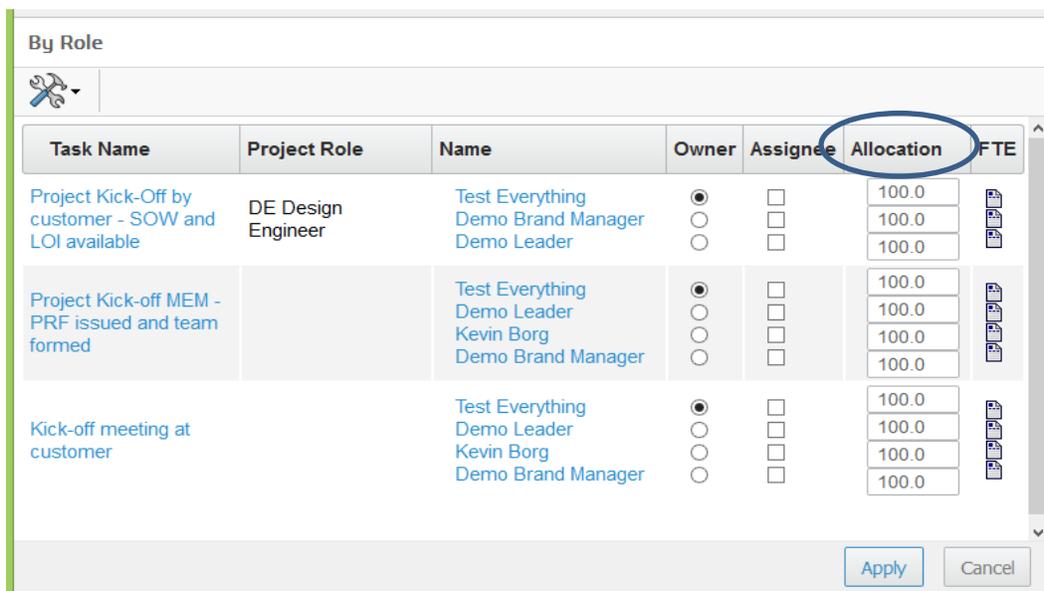
| | | | |
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1.10.2 Assigning Tasks By Role

Select the tasks to be assigned; select Assign By Role from the Actions menu



The Project Lead selects the assignees from project members and define allocation for each assignee. If the task is associated to a specific Project Role (from template definition), the system lists only the project members with that specific role, otherwise all the members of the project are listed and can be assigned the task.

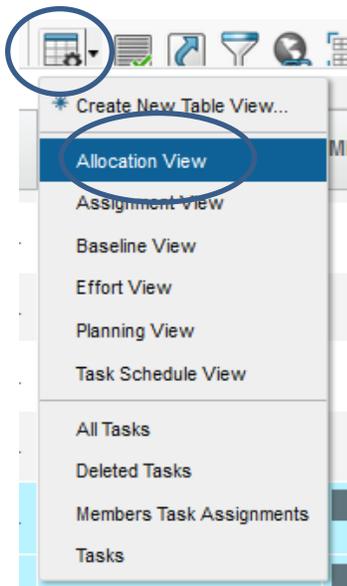


The Project Lead can change the Allocation of the tasks, see chapter “Resource loading Report”

| | | | |
|---------|----------|-------|------------------|
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1.10.3 Assigning Tasks with allocation

The Project Lead can define the percentage of the allocation of the tasks pressing the View command on the toolbar and selecting the Allocation View from the list



Using this view the Project Lead define for each task the percentage assigned to each user involved.

| Activities Estima... | | Gantt Chart | | Phase Gate View | | Project Members % Allocation | | | | | |
|----------------------|----------|-------------|--------------|-----------------|-------|------------------------------|----------------------|------------------------------|---------------------------|----|--|
| Name | Progress | Total Alk | Duration | End Date | Owner | MEM Account Manager | MEM Quality Engineer | EVERYTHING Test Project Lead | MEM Product Design Engine | id | |
| Program | 0.0 % | 2.0 Days | Aug 14, ... | Test Every... | | | | | | 33 | |
| Final de | 0.0 % | 2.0 Days | Nov 13, ... | Test Every... | | | | | | 34 | |
| Initial qu | 0.0 % | 30.0 D... | Nov 11, ... | Test Every... | | | | | | 35 | |
| Process D | 0.0 % | 100.0 ... | Dec 30, ... | Test Every... | | | | | | 36 | |
| Lab figs | 100.0 % | 40.0 D... | Oct 7, 20... | Test Every... | | 25% | 45% | 30% | | 37 | |
| Paint fig | 300.0 % | 30.0 D... | Sep 23, ... | Test Every... | | 100% | 100% | 100% | | 38 | |
| Assemb | 300.0 % | 10.0 D... | Aug 26, ... | Test Every... | | 100% | 100% | 100% | | 39 | |
| Assemb | 300.0 % | 75.0 D... | Nov 25, ... | Test Every... | | 100% | 100% | 100% | | 40 | |
| PCBA as | 0.0 % | 40.0 D... | Oct 7, 20... | Test Every... | | | | | | 41 | |
| PCBA lo | 0.0 % | 100.0 ... | Dec 30, ... | Test Every... | | | | | | 42 | |
| PCBA he | 0.0 % | 100.0 ... | Dec 30, ... | Test Every... | | | | | | 43 | |

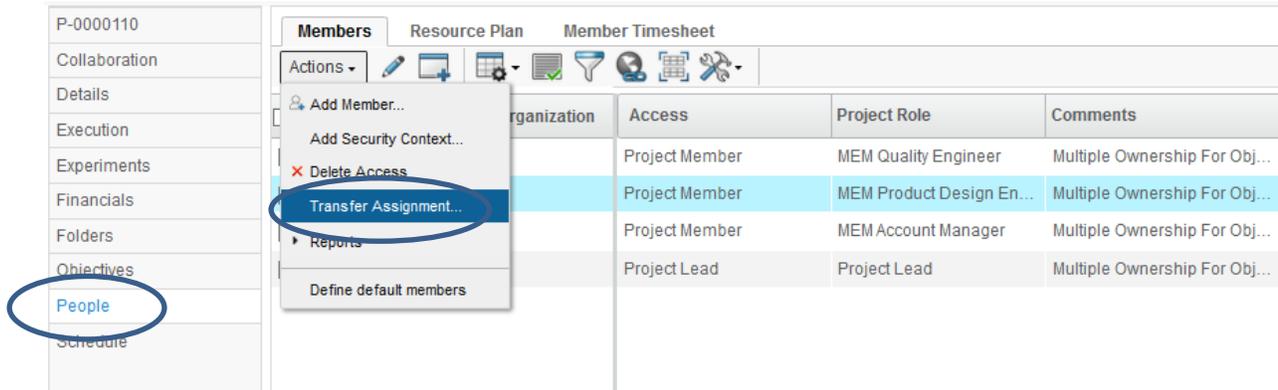
Filter: Allocation View, All Tasks 92 objects, 4 selected

The project lead can modify the percentage assigned to the users.

| | | | |
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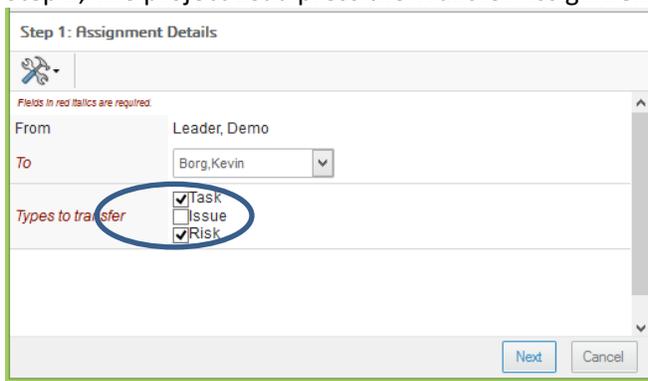
1.10.4 Transfer Assignment

Project Lead can transfer the assignments (task, risk and issue assignments) from one person to another, if objects are not in completed state

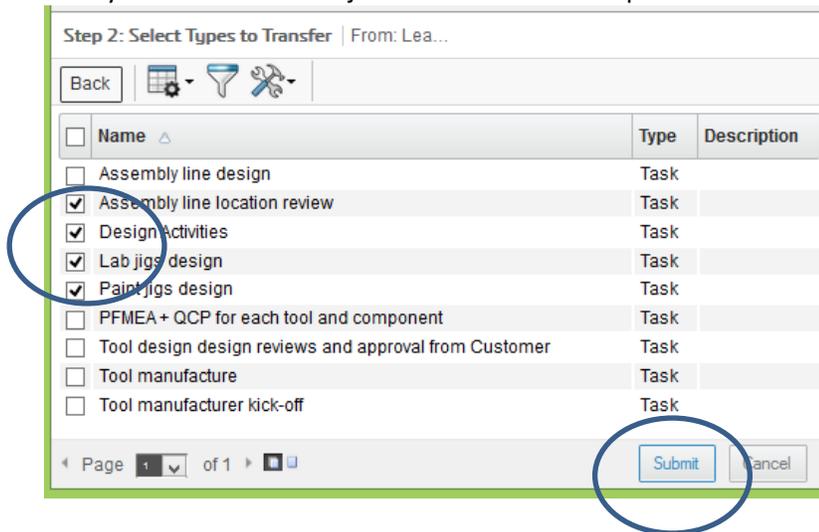


Step 1 the project lead select the person from the Members tab

Step 2, The project Lead press the Transfer Assignment and define what kind of objects he wants to reassign



The system lists all the objects that match the requirements.

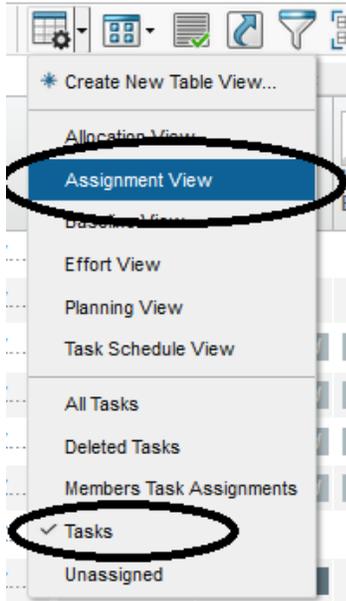


| | | | |
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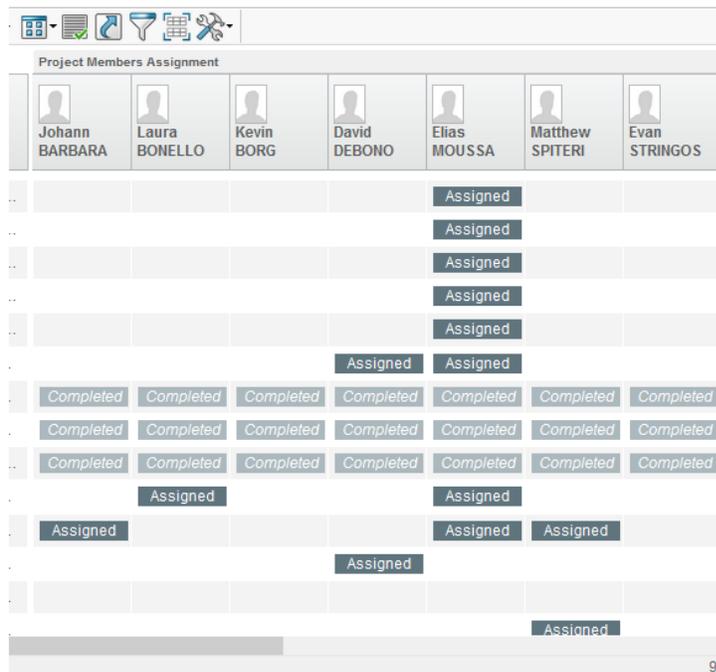
1.10.5 Recognize tasks with no assignees

In order to complete project execution, Project Lead has to assign each task to a project member. Projects can be composed by several tasks; Project Lead has to scan project schedule in order to check which tasks are not yet assigned.

Project Lead can use the view Assignment in order to define tasks assignees

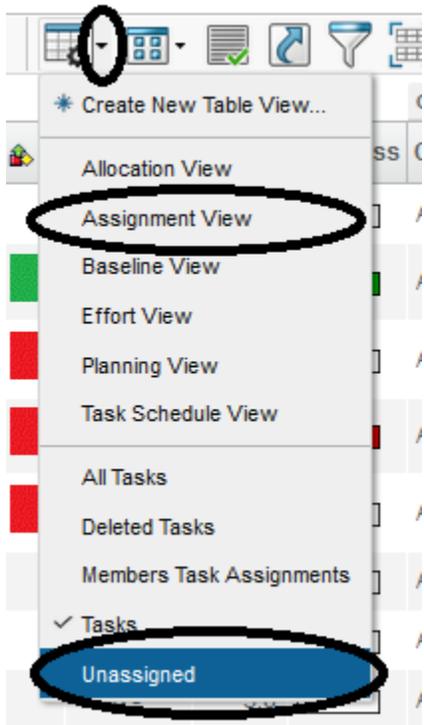


The table shows all tasks, all if already completed or assigned



Project Lead can use the filter Unassigned, in order to find all tasks not yet assigned.

| | | | |
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The table shows the tasks not yet assigned and the summary tasks that contain at least one task not yet assigned (in the example below, the summary task "PLS PHASE 4" is assigned to a user but there are sub-tasks not yet assigned)

| Estimated | | | | | | | Project Members Assignment | | | | | | |
|-------------------|--------------|-------|-------------------------------------|-----------|--------------|---------------|----------------------------|---------------|------------|--------------|--------------|-----------------|----------|
| Name | Type | % | Progress | Duration | End Date | Owner | Johann BARBARA | Laura BONELLO | Kevin BORG | David DEBONO | Elias MOUSSA | Matthew SPITERI | Evar STR |
| P1 | Project S... | 1.0 | <input type="checkbox"/> | 221.0 ... | Sep 29, ... | Joseph Z... | | | | | | | |
| PLS PHASE 1 - Pro | Phase | 10... | <input checked="" type="checkbox"/> | 7.0 Days | Oct 23, 2... | Joseph Z... | | | | | | | |
| PLS PHASE 3 - Pro | Phase | 1.7 | <input type="checkbox"/> | 103.0 ... | Apr 1, 20... | Joseph Z... | | | | | | | |
| Product Design | Task | 0.0 | <input type="checkbox"/> | 7.0 Days | Oct 23, 2... | Test Every... | | | | | | | |
| Mag Cell | Task | 0.0 | <input type="checkbox"/> | 1.0 Days | Oct 15, 2... | Test Every... | | | | | | | |
| T-0000599 | Task | 0.0 | <input type="checkbox"/> | 1.0 Days | Oct 23, 2... | Test Every... | | | | | | | |
| T-0000605 | Task | 0.0 | <input type="checkbox"/> | 1.0 Days | Oct 15, 2... | Test Every... | | | | | | | |
| T-0000599 | Task | 0.0 | <input type="checkbox"/> | 1.0 Days | Oct 15, 2... | Test Every... | | | | | | | |
| T-0000600 | Task | 0.0 | <input type="checkbox"/> | 1.0 Days | Oct 15, 2... | Test Every... | | | | | | | |
| T-0000599 | Task | 0.0 | <input type="checkbox"/> | 1.0 Days | Oct 15, 2... | Test Every... | | | | | | | |
| PLS PHASE 4 - Pro | Phase | 2.0 | <input type="checkbox"/> | 132.0 ... | Jun 9, 2... | Joseph Z... | | | | | | | Assigned |
| Gate 4 - Review | Gate | 0.0 | <input type="checkbox"/> | 0.0 Days | Jun 9, 2... | Joseph Z... | | | | | | | |
| STAreview as | Task | 0.0 | <input type="checkbox"/> | 3.0 Days | Apr 6, 20... | Test Every... | | | | | | | |
| Tool tuning lo | Task | 0.0 | <input type="checkbox"/> | 45.0 D... | Jun 8, 2... | Test Every... | | | | | | | |

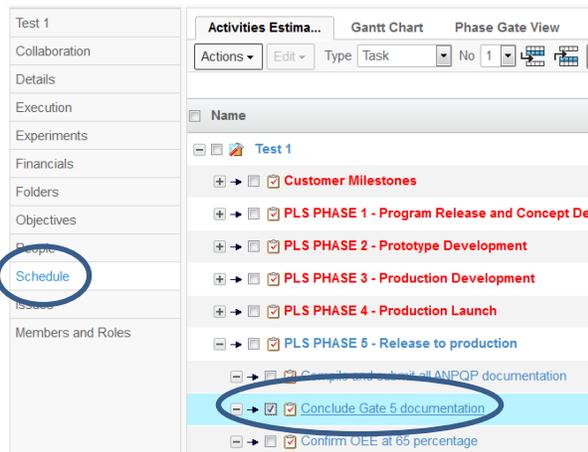
| | | | |
|---------|----------|-------|------------------|
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1.11 Define Tasks Approval

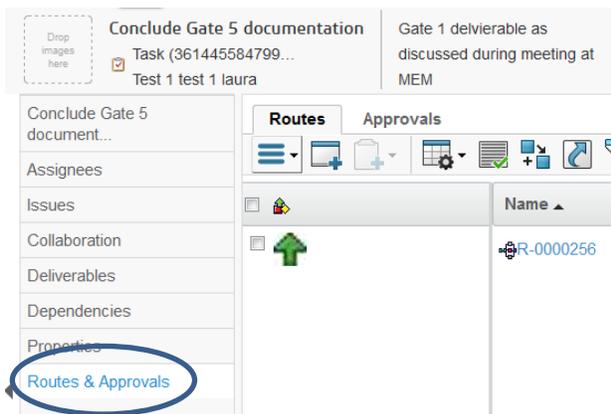
The Project Lead can define an optional approval process for tasks:

Step 1 Select the command **Schedule**, this will show all the task of the project

Step 2 Select the task to assign the task approval and press the link to open the task page



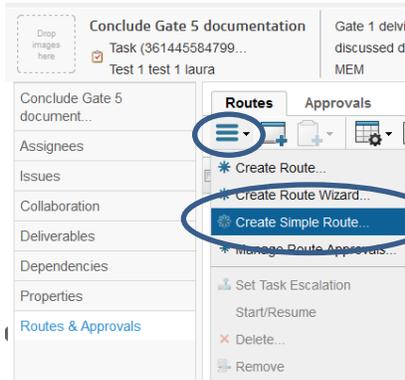
Step 3 Select the command **Routes & Approvals** from the page of the task



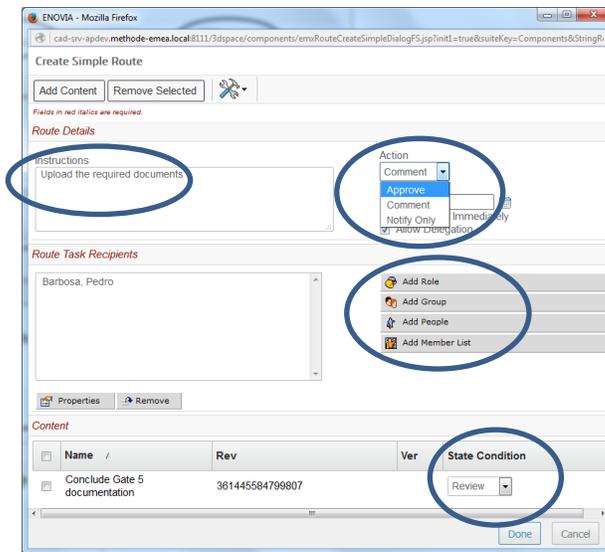
| | | | |
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| Version | 7 | Date: | 28-November-2017 |
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1.11.1 Simple Route

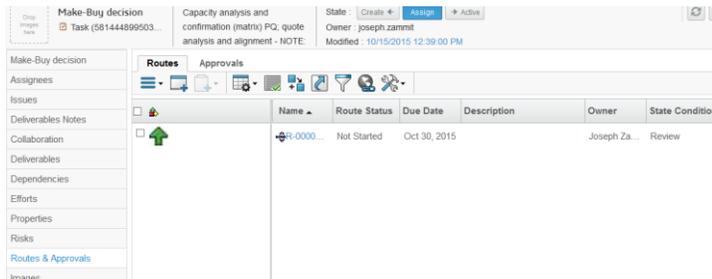
Select command **Create Simple Route** from the Actions menu to create an approval process from scratch.



Define the Instructions, Actions (Approve or Comment), people involved in approval, select Review as State Condition



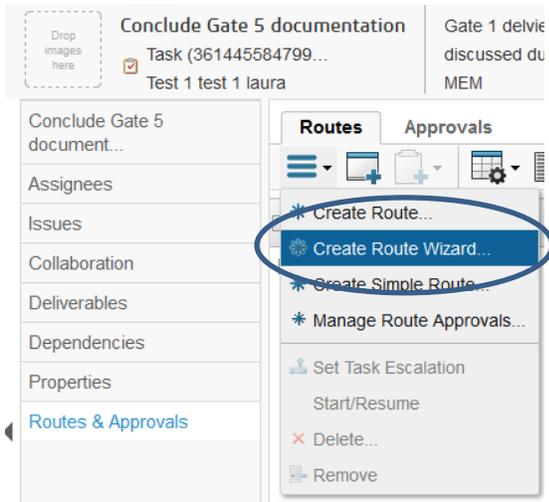
An alert shows that Route process will start when task will reach the state Review



| | | | |
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1.11.2 Create Route Wizard

Select command **Create Route Wizard** from the Actions menu to create an approval process from wizard.



Set up all the required information in the form

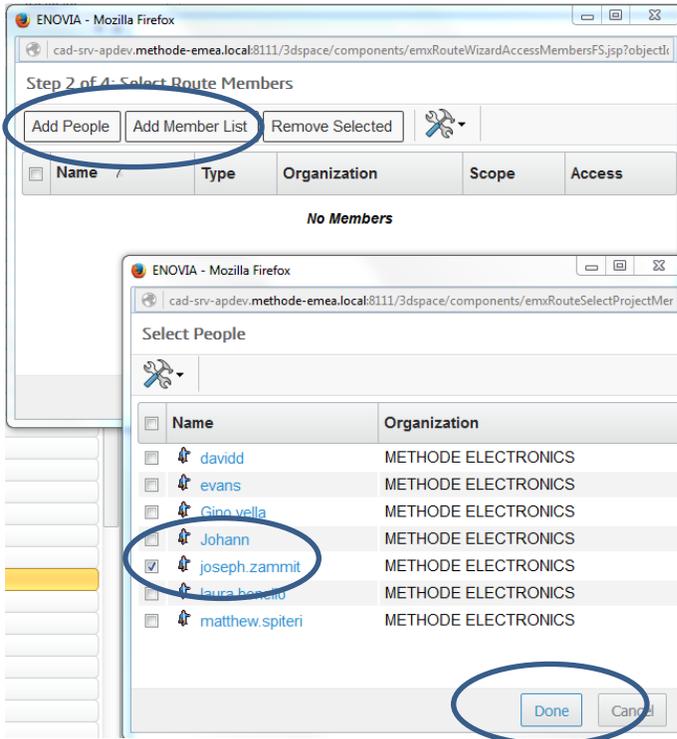
The screenshot shows the 'Step 1 of 4: Specify Details' form. Fields include: Name (with 'AutoName' checked), Template (with 'Clear' button), Description (empty), Route Base Purpose (Standard), Scope (Test 1 Type:Project Space selected), Route Completion Action (Notify Route Owner), Start Route (Upon Wizard Completion selected), Auto Stop On Rejection (Immediate), and a table with one entry: 'Conclude Gate 5 documentation' (Rev: 361445584799807, State: Create).



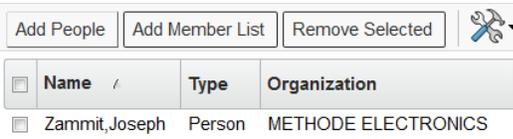
The screenshot shows the same form as the left, but with several changes circled in blue: 'Document upload' in the Description field, 'Approval' in the Route Base Purpose dropdown, 'Manually' selected for Start Route, and 'Review' in the State Condition dropdown of the table entry.

Add people or members

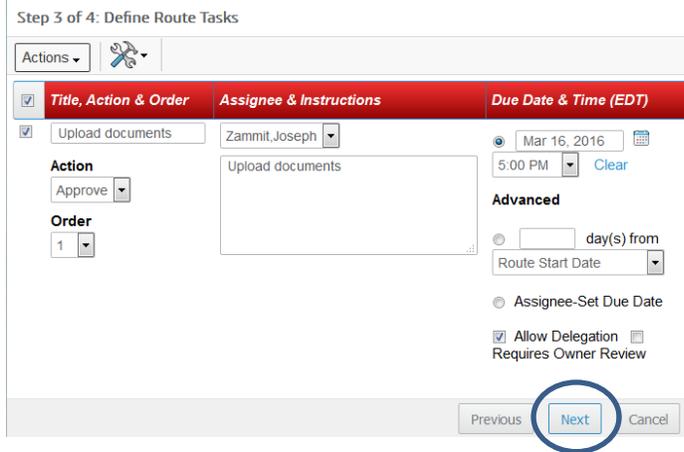
| | | | |
|---------|----------|-------|------------------|
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Step 2 of 4: Select Route Members



Add the actions, setup the required fields and assign the people.



Press next

| | | | |
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Step 4 of 4: Action Required

| Order | Name | Action | Action Required |
|-------|------------------|---------|-----------------|
| 1 | Upload documents | Approve | |

Complete the process, the new route is created.

R-0000257 Document upload Owner : joseph.zammit
 Route (36144558479... Modified : Mar 15, 2016 2:44:16 PM

R-0000257

Properties Content Access Discussions History

| | | | |
|-------------------------|--------------------|------------------------|-------------|
| Name | R-0000257 | State | Not Started |
| Owner | Joseph Zammit | Scope | Test 1 |
| Description | Document upload | Template | |
| Originated | Mar 15, 2016 | Route Base Purpose | Approval |
| Route Completion Action | Notify Route Owner | Auto Stop On Rejection | Immediate |

Tasks (Graphical) Tasks

R-0000257 : Tasks (Graphical)

```

    graph LR
      A[Upload documents  
Joseph Zammit  
Mar 16, 2016] --> B[Approve]
    
```

From the Actions menu the Project Lead can start the route or modify the parameters of the task

R-0000257 Document upload Owner : joseph.zammit
 Route (36144558479... Modified : Mar 15, 2016 2:44:16 PM

R-0000257

Properties Content

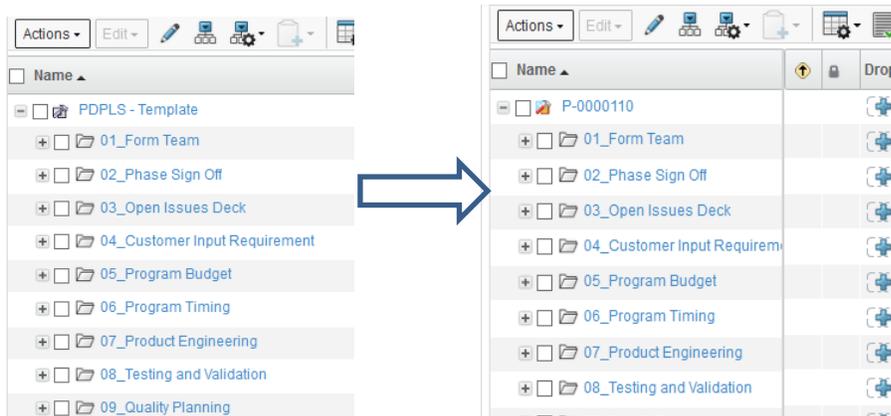
- Edit Details
- Set Task Escalation...
- Save as Template...
- Start Route...**
- Subscribe...
- Push Subscription...

| | | | |
|---------|----------|-------|------------------|
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| Status | Released | | 48 |

1.12 Folders management

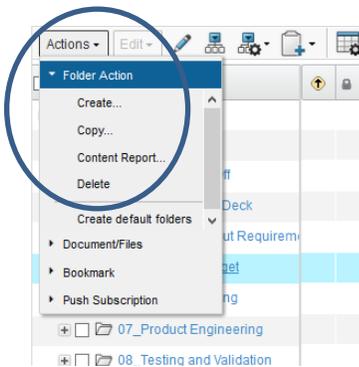
A Project Lead can create a folder structure to store project information to improve collaboration and quality.

Folder structure can be created via project templates or 'ad-hoc'. If the Project Lead wants to use a project template, it's necessary to create at least one project template with the desired folder structure, then this template can be cloned to create a new project with the same folder structure.



1.12.1 Folder creation

Project owner and Project Lead can create a top level folder. Anyone with Add access on the folder can create a sub-folder. A folder can be created by copying an existing folder. All folder content, subfolders, and subfolder content are also copied to the new folder



During folder creation, user can define folder access:

- Yes: for subfolders, the subfolder's access list will inherit the parent folder's access list. Whenever the parent's access list is changed, the same change is made to the subfolder's access list. The subfolder access list can be changed directly without affecting the parent's list. For top-level folders, all project members are added to the folder's access list and are given Read access.
- No: the folder/subfolder's access list is not inherited from the parent. Changes to the parent or subfolder's access list are independent and have no effect on the other folder.



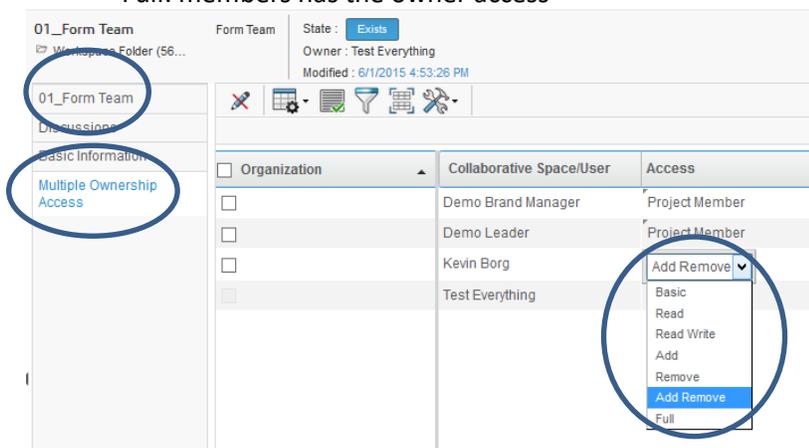
| | | | |
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1.12.2 Folder access rights

Folder owner or members with Full access can define access grant to folder

Folder Access: these accesses are automatically assigned to any sub-folder added to the folder with an access type of Inherited:

- Basic: a person with Basic / Project member access can view folder properties, participate in discussions for it, and view accesses for the folder.
- Read: a person with Read access to a folder can perform the tasks described for Basic access, plus checkout documents.
- Read Write: a person with Read Write access to a folder can perform the tasks described for Read access. Additionally, people with Read Write access can edit basic information for the folder.
- Add: a person with Add access to a folder can perform all Read and Write actions and can also add content to the folder and add subfolders.
- Remove: a person with Remove access to a folder can perform all Read and Write actions and can also remove subfolders.
- Add Remove: a person with Add Remove access to a folder can perform all Add and Remove actions and can also add and remove members from the access list and change access levels.
- Full: members has the owner access



| | | | |
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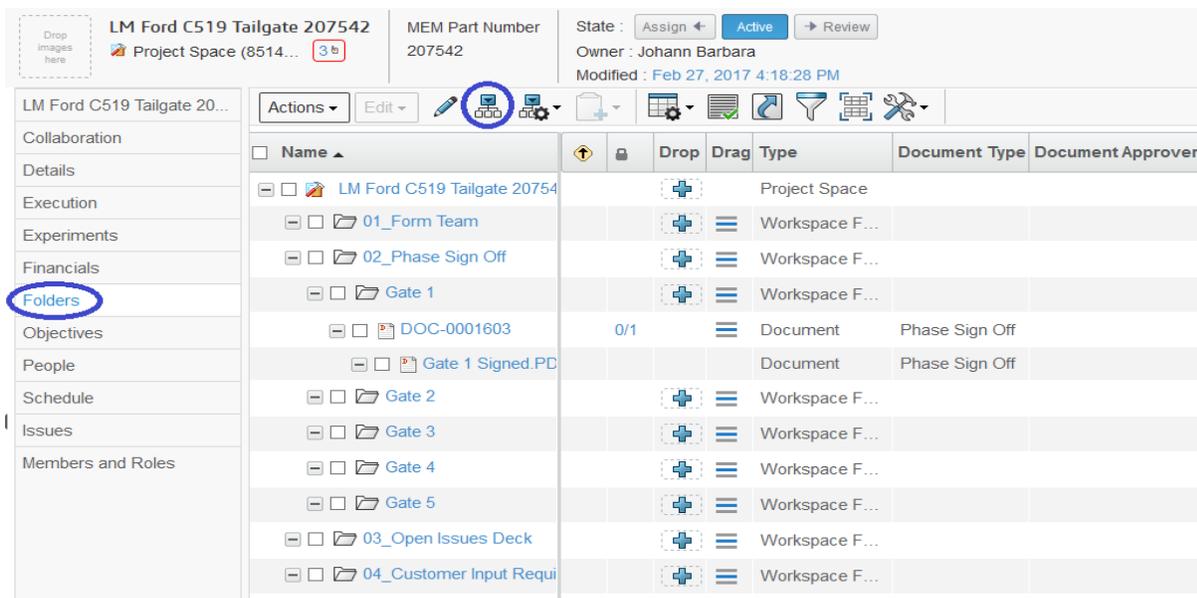
1.12.3 Folders accesses definition and update

If a Project is created from a template, the folder access definition defined for the Template is copied to the Project (see chapter “Folders Accesses” in section “Project Template”). If the Project is created from scratch or the Template used for creation has no folder access definition, the Project Lead can define the folder access definition for a specific Project.

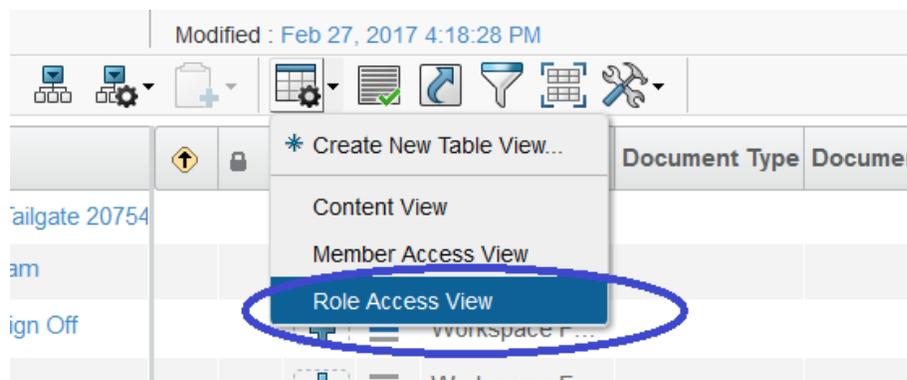
The approach is to define, for each folder at Project level, the access for each Project Role. Only the Project Lead can define the folder access definition. Once the folder accesses are defined, a dedicate function “Update Folder Access” can be used to apply the access to project members, using the Project Role information defined in the Project.

Definition

After selecting the Project, from main menu, select the command Folders; in order to setup the access for all folders and sub-folders, select the icon to expand the view



A dedicated table “Role Access View” shows a grid with “Folder Name” and “Project Role”; from the toolbar, select the “filter table” icon and select “Role Access View”



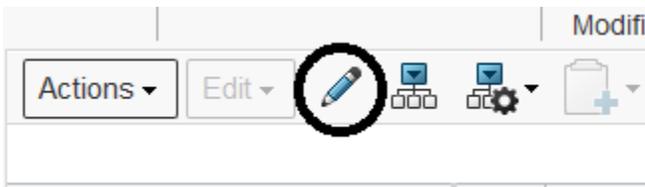
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The grid will show all project roles defined, not only the ones defined at Project Template, because during project execution, the Project Lead can add project role not used at project template.

| Project Role Access | | | | | | | | | |
|-----------------------|----------------|-------------|------------|---------|--------------------|-----------------|-------------------|------------------|-------------|
| Name | Type | Owner | Default Us | Inherit | AM Account Manager | CA Cost Analyst | CC Change Coordin | CS Customer Serv | Fin Finance |
| LM Ford C519 Tailgate | Project Space | Johann B... | | | Read | Read | Read | Read | Read |
| 01_Form Team | Workspace F... | Johann B... | Read | Yes | Read | Read | Read | Read | Read |
| 02_Phase Sign Off | Workspace F... | Johann B... | Read | Yes | Read | Read | Read | Read | Read |
| Gate 1 | Workspace F... | Johann B... | Read | Yes | Read | Read | Read | Read | Read |
| Gate 2 | Workspace F... | Johann B... | Read | Yes | Read | Read | Read | Read | Read |
| Gate 3 | Workspace F... | Johann B... | Read | Yes | Read | Read | Read | Read | Read |
| Gate 4 | Workspace F... | Johann B... | Read | Yes | Read | Read | Read | Read | Read |
| Gate 5 | Workspace F... | Johann B... | Read | Yes | Read | Read | Read | Read | Read |
| 03_Open Issues | Workspace F... | Johann B... | Read | Yes | Read | Read | Read | Read | Read |
| 04_Customer Inq | Workspace F... | Johann B... | Read | Yes | Read | Read | Read | Read | Read |
| Contract_SO | Workspace F... | Johann B... | Read | Yes | Read | Read | Read | Read | Read |
| Letter of Inten | Workspace F... | Johann B... | Read | Yes | Read | Read | Read | Read | Read |

Project Lead has to define, for each folder and for each Project Role, the access type.

- Select the Edit icon



- Select the Access type for each role

| Project Role Access | | | | | | | |
|-----------------------|----------------|-------------|------------|---------|--------------------|-----------------|---------|
| Name | Type | Owner | Default Us | Inherit | AM Account Manager | CA Cost Analyst | CC Char |
| LM Ford C519 Tailgate | Project Space | Johann B... | | | Read | Read | Read |
| 01_Form Team | Workspace F... | Johann B... | Read | Yes | Read | Read | Read |
| 02_Phase Sign Off | Workspace F... | Johann B... | Read | Yes | Read | Read | Read |
| Gate 1 | Workspace F... | Johann B... | Read | Yes | Read | Read | Read |
| Gate 2 | Workspace F... | Johann B... | Read | Yes | Read | Read | Read |
| Gate 3 | Workspace F... | Johann B... | Read | Yes | Read | Read | Read |
| Gate 4 | Workspace F... | Johann B... | Read | Yes | Read | Read | Read |
| Gate 5 | Workspace F... | Johann B... | Read | Yes | Read | Read | Read |
| 03_Open Issues D | Workspace F... | Johann B... | Read | Yes | Read | Read | Read |

- Select Save when completed; the update can be executed several times

| | | | |
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Apply the folder accesses to project members

The Project Members can be defined in several steps; the people involved in project execution can also change during project lifecycle. In order to update the Project Folder access definition accordingly to Project Members definition, a dedicate function “Update Folder Access” will be available in Project Member toolbar.

The screenshot shows a project management interface for 'LM RENAULT e-Shifter 0000224...'. The interface includes a top navigation bar with 'Assign', 'Active', and 'Review' buttons. Below this is a sidebar with navigation options like 'Collaboration', 'Details', 'Execution', etc., with 'People' circled in red. The main area displays a table of project members with columns for 'Organization', 'Access', and 'Project Role'. A context menu is open over the table, showing options like 'Add Member...', 'Delete Access', and 'Update Folder Access...'.

| Organization | Access | Project Role |
|--|----------------|--|
| ETHODE ELEC.. | Project Member | |
| | Project Member | AM Account Manager |
| | Project Member | EE Senior Product Electronics Engineer |
| | Project Member | LT Senior Lab Technician |
| | Project Member | TE Tooling Engineer |
| | Project Member | ME Senior Manufacturing Engineer |
| <input type="checkbox"/> Attilio Fumagalli | Project Lead | |
| <input type="checkbox"/> Charles Zammit | Project Member | TE Tooling Engineer |
| <input type="checkbox"/> Christian Spiteri | Project Member | EE Product Electronics Engineer |
| <input type="checkbox"/> David Baldacchino | Project Member | ME Manufacturing Engineer |

If a person, which was defined as a Project Member with a specific project Role, is removed from Project Space definition, the access permission will be removed only after the execution of function “Update Folder Access”.

The same behavior if the Project Role of a person is updated: the access permission will be updated only after the execution of function “Update Folder Access”.

| | | | |
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1.13 Deliverables definition in Project Execution by Project Lead

When a Project is created from a template, all deliverables defined in Project Template tasks are copied to the related Project tasks. The deliverables are defined at task level.

Project Template: deliverables definition for task “Tool manufacturer kick-off”

| Deliverables | | | | | | | | | | | | |
|--------------------------|--------------------------|--------------------------|----------------------------|--------------|-----|-----|----------|---------|--------------|----------------------------|---------------------|----------|
| Actions | | | | | | | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Name | Title | Rev | Ver | Type | Actions | Description | Document Approver Role | Document Type | State |
| <input type="checkbox"/> | 0/1 | | DOC-0000163 | Tool spec | 0 | 1 | Document | | Tool spec | TE Senior Tooling Engineer | Quality Engineering | Released |
| <input type="checkbox"/> | 0/1 | | Tool new doc-1052164694606 | Tool new doc | 0 | 1 | Document | | Tool new doc | DE Senior Design Engineer | Product Engineering | Released |

Project: deliverables definition for task “Tool manufacturer kick-off”

| Deliverables | | | | | | | | | | | | |
|--------------------------|--------------------------|--------------------------|---------------------------|--------------|-----|-----|----------|---------|--------------|----------------------------|---------------------|---------|
| Actions | | | | | | | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Name | Title | Rev | Ver | Type | Actions | Description | Document Approver Role | Document Type | State |
| <input type="checkbox"/> | 0/1 | | Tool new doc-173901735874 | Tool new doc | 0 | 1 | Document | | Tool new doc | DE Senior Design Engineer | Product Engineering | Private |
| <input type="checkbox"/> | 0/1 | | Tool spec-153901735452 | Tool spec | 0 | 1 | Document | | Tool spec | TE Senior Tooling Engineer | Quality Engineering | Private |

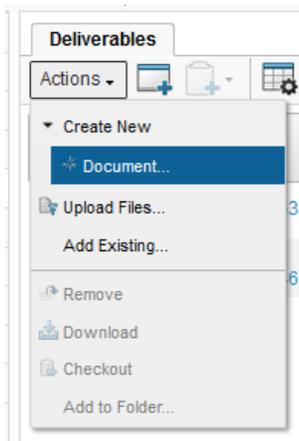
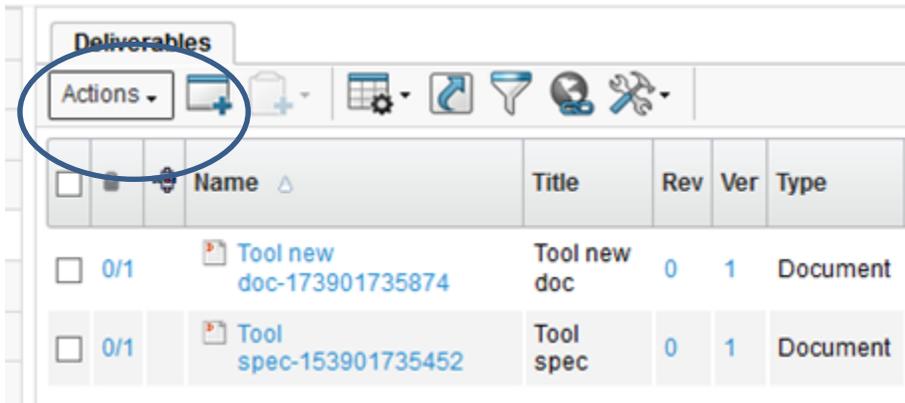
The documents are created and the name is retrieved from attribute “Title” defined for documents contained in project template deliverables.

Also the other information, like Document Approver Role and description, are copied; the documents are created in state Private and the owner is the Project Lead.

Project Lead, before activating the project, can add new documents or modify attribute values (for example, in order to define a Document Approver role specific for a document and different from template information)

| | | | |
|---------|----------|-------|------------------|
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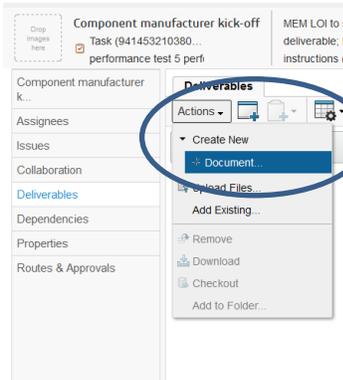
Project Lead can create new documents using the commands contained in the Deliverable Action menu



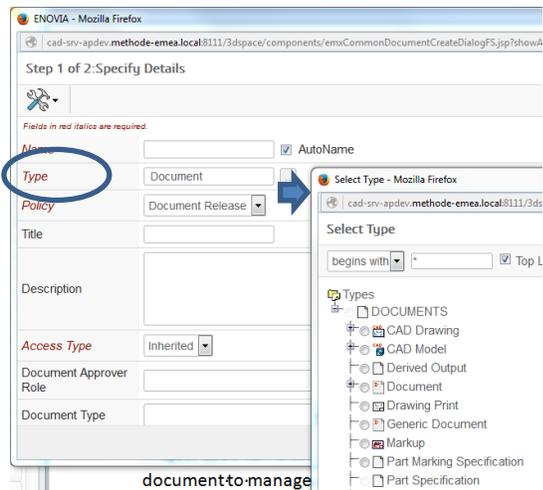
| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
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1.13.1 Create New Document

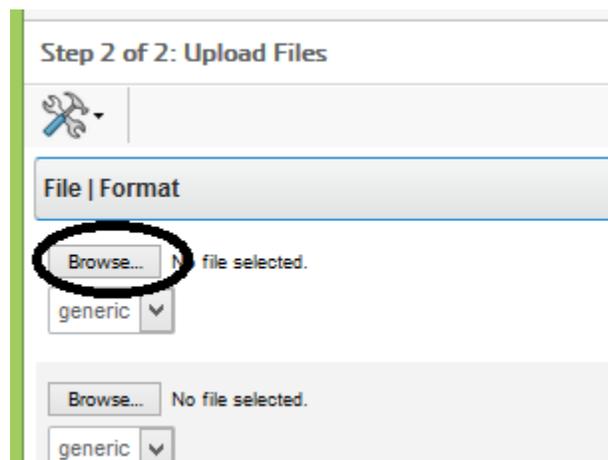
If the Project Lead uses the Create New --> Document command from the Actions menu,



the system opens a new window that allows the selection of the type of the document, the name (auto naming is available), the title and other information

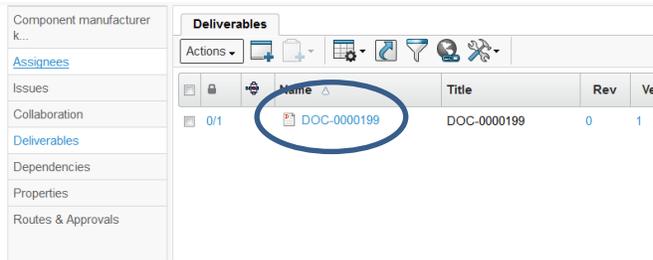


The user selects the file to upload from the file system using command Browse



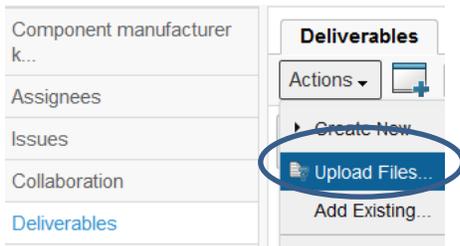
| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
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The result is a new document, with the selected file uploaded as attachment of the document

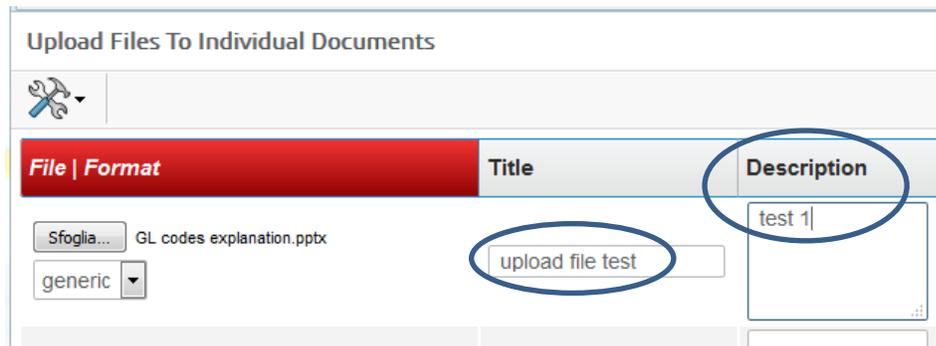


1.13.2 Upload files

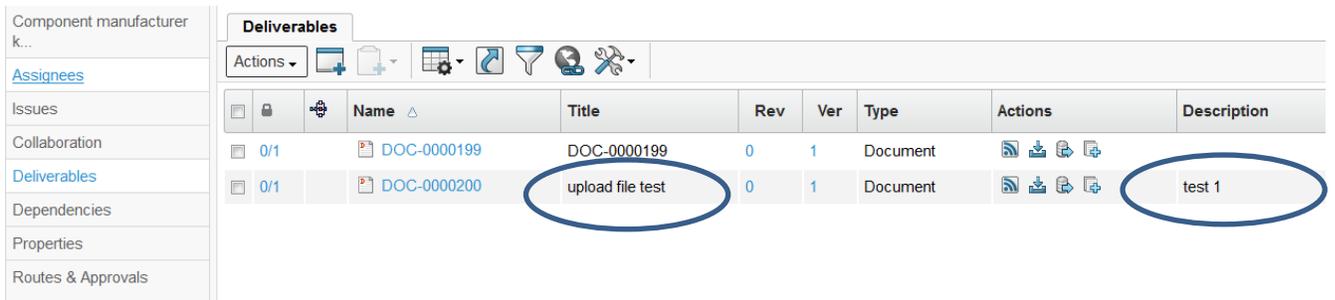
If the Project Lead uses the Upload files command from the Actions menu,



The system shows directly the form to select the file to upload, skipping the detail form, and the result is a new document generated with the default values for type, name and so on. It's possible to set up the title and a description.



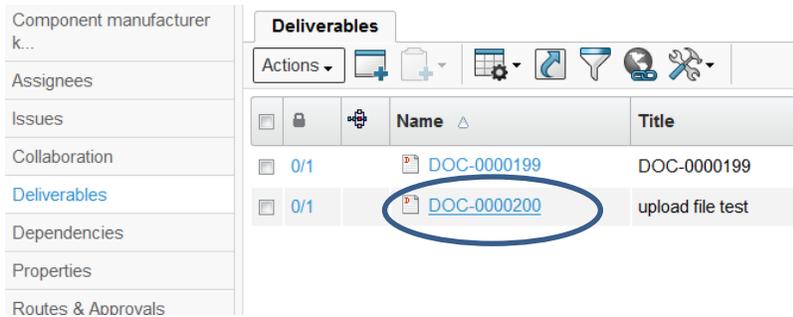
The result is a new document, with the selected file uploaded as attachment of the document



1.13.3 Add Existing

| | | | |
|---------|----------|-------|------------------|
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Project Lead can also update document information: from Deliverables table, select the link related to the document.

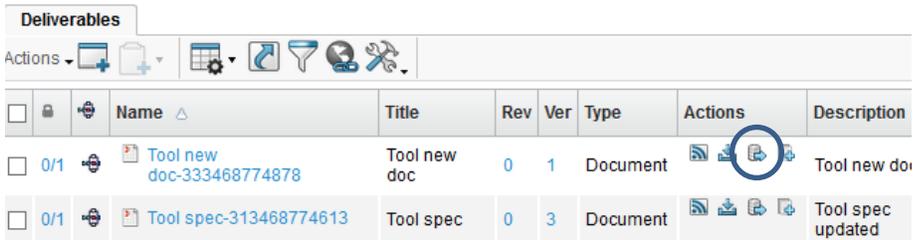


A new window opens with the document details.

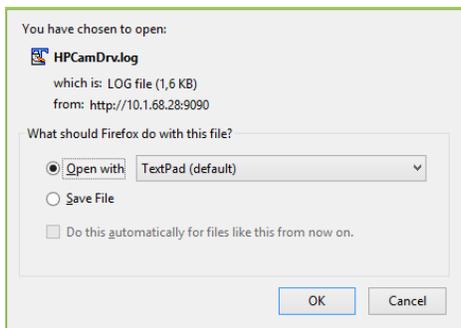
1.13.4 Create new Version

The column Action contains the button (icon) that can be used to create a new version of the attachment.

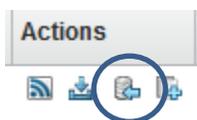
A new version is a new attachment that refers to the same main document.



Step 1 select the icon checkout, save the document in a folder (the window that appears depends on file type)



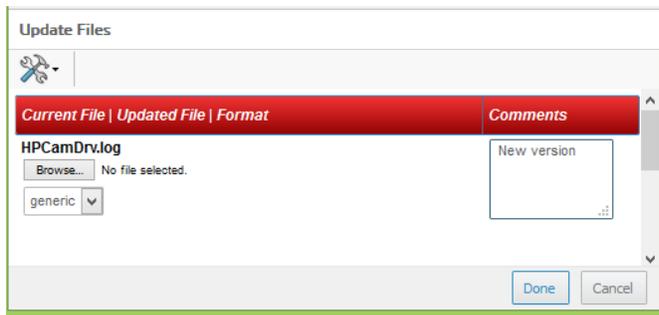
Note that the column Action changes to reflect the new document status the previous icon is substituted by the icon checkin, that means that the document is locked and can be updated



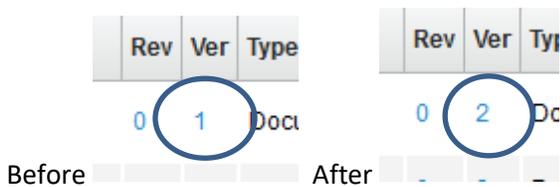
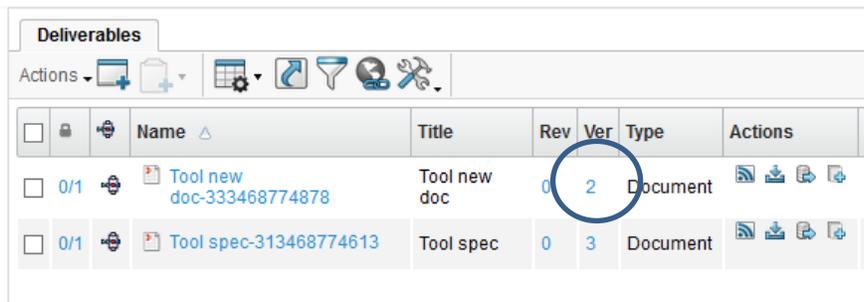
| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
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Step 2 the user has to update the file, and save it on the file system

Step 3 the user uploads the new attachment using the icon , a new window opens that ask the user to browse and select the file updated



Step 4 enter a comment and press done. This action creates a new version of the file and the deliverable table is updated in order to show the last version



The same functions are available also in Actions menu in the document form details: select link from document name opens a window with document details

1.13.5 Download an attachment

If the user only wants to download the document without checkin afterwards, he can press the download icon

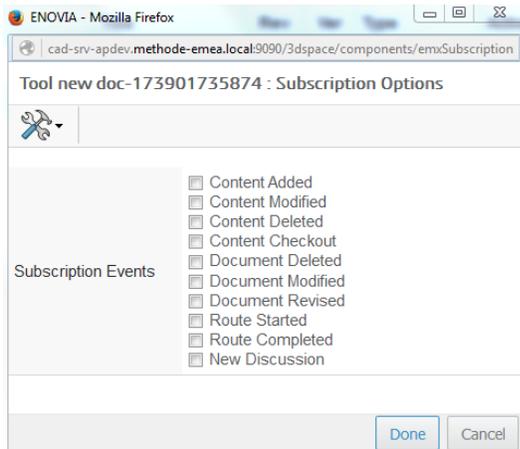


. The system asks where to save the file. This file cannot be uploaded again.

| | | | |
|---------|----------|-------|------------------|
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| Status | Released | | 59 |

1.13.6 Subscribe a Document

If the user needs to be notified if an event happens on a document, he has to subscribe to the document. Only some events can be subscribed, because the set of the event that can be checked are fixed by the system.



When the event checked by the user happens on the document, the user receives an e-mail or an iconmail.

To subscribe a document the user

Step 1 Select the document

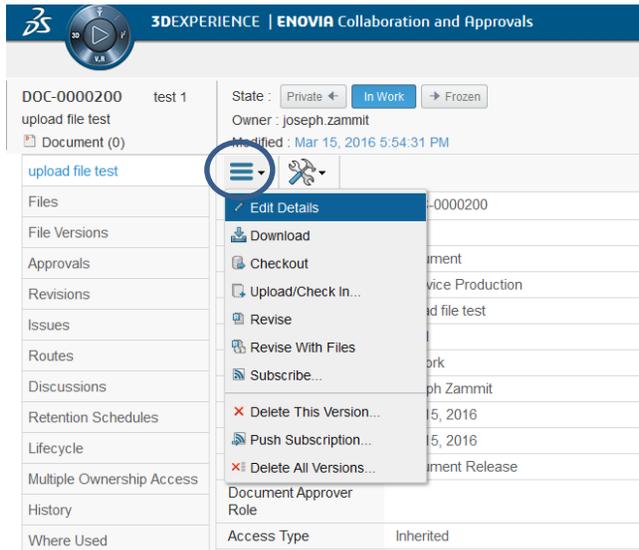
Step 2 Press the Subscriptions button from the deliverable table

Step 3 Select the events he need to be subscribe and press done

| | | | |
|---------|----------|-------|------------------|
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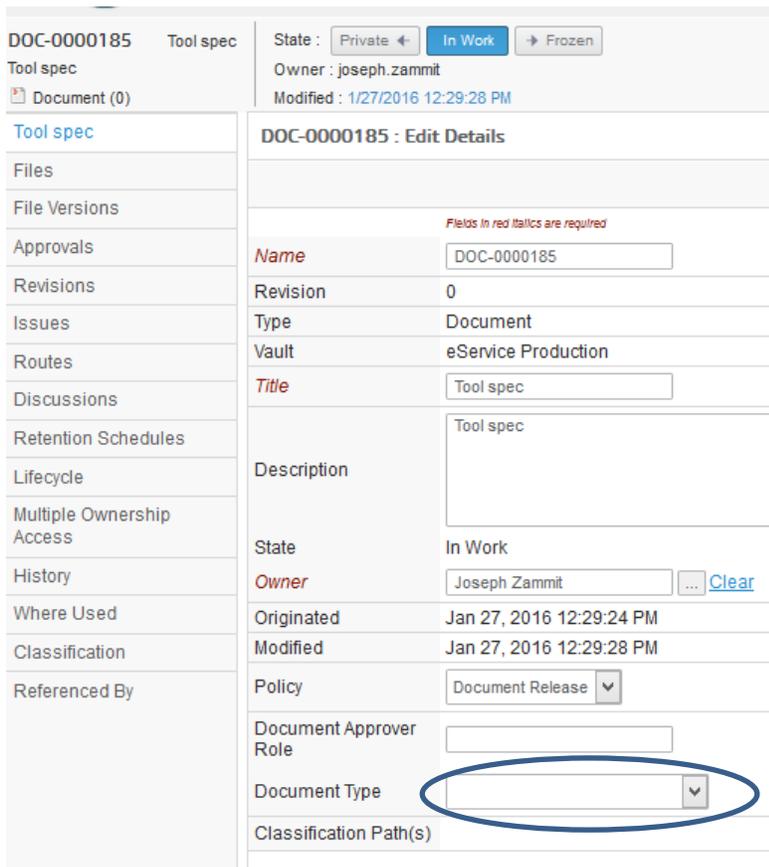
1.13.7 Document - Action menu

The Action menu of the document contains all the commands that can be used to manage files and information. Some of them are the same of the column Action of the deliverable table.



Edit Details

Allows users to update the information of the document, for example Document Type.



| | | | |
|---------|----------|-------|------------------|
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Download

Allows the user to download the attachment of the document

Checkout

Allows the user to lock the file for update and download the attachment

Upload/Checkin

Allows the user to upload a new version of the attachment in the document.

Revise

Allows the user to create a new revision of the document without attachments

Revise with files

Allows the user to create a new revision of the document with the attachments of the previous release

Subscribe

Allows the user to subscribe the document.

Delete this version

Allows the user to delete a particular version of a document

Push subscribe

Force the subscription of a document for a user

Delete all versions

Purge all the versions of a document

| | | | |
|---------|----------|-------|------------------|
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| Status | Released | | 62 |

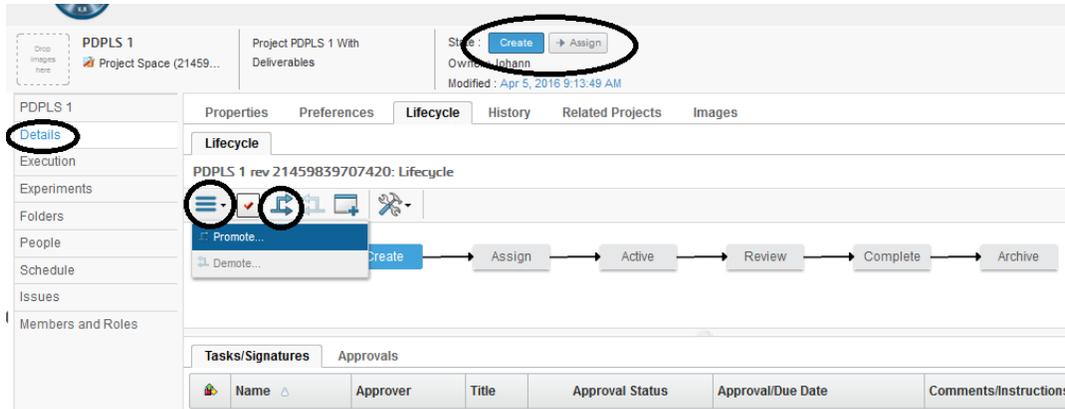
1.14 Project Activation

After creation, the project state has to be moved to state Active, in order to start project execution.

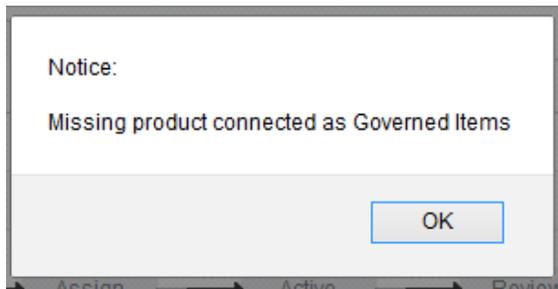
Project Lead, after completed the project definition with folders, tasks and members, has to move the state from Create to Assign and from Assign to Active.

In order to promote a project space, Project Lead can use the following functions:

- The dedicated portion in project header
- The icon contained in lifecycle toolbar (Lifecycle is contained in command Details)
- The command contained in lifecycle menu Action (Lifecycle is contained in command Details)



In order to promote the project to state Assign and to state Active, the system checks if there is a product connected as Governed Items; if there is no product connected, the system shows an error message.



In order to connect a project to a product, see chapter "Product Definition".

| | | | |
|---------|----------|-------|------------------|
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| Status | Released | | 63 |

When the project is moved to state Active, also the sub-tasks move to state Assign; the tasks assignees receive a notification about task assigned, in order to start execution.

Project PDPLS 1 With Deliverables
Owner: Johann
Modified: Apr 5, 2016 9:36:15 AM

PDPLS 1
Project Space (21459...)

Activities Estima... Gantt Chart Phase Gate View

| Name | Type | Id | Dependency | Status | % | Progress | Constraint |
|-----------------|--------------|-----|------------|--------|-----|----------|--------------|
| PDPLS 1 | Project S... | | | Active | 0.0 | | As Soon As P |
| Customer Miles | Phase | 1 | 0 | Assign | 0.0 | | As Soon As P |
| PLS PHASE 1 - F | Phase | 11 | 0 | Assign | 0.0 | | As Soon As P |
| PLS PHASE 2 - F | Phase | 88 | 0 | Assign | 0.0 | | As Soon As P |
| PLS PHASE 3 - F | Phase | 119 | 0 | Assign | 0.0 | | As Soon As P |
| PLS PHASE 4 - F | Phase | 161 | 0 | Assign | 0.0 | | As Soon As P |
| PLS PHASE 5 - F | Phase | 183 | 0 | Assign | 0.0 | | As Soon As P |
| Sample deliveri | Phase | 189 | 0 | Assign | 0.0 | | As Soon As P |

| | | | |
|---------|----------|-------|------------------|
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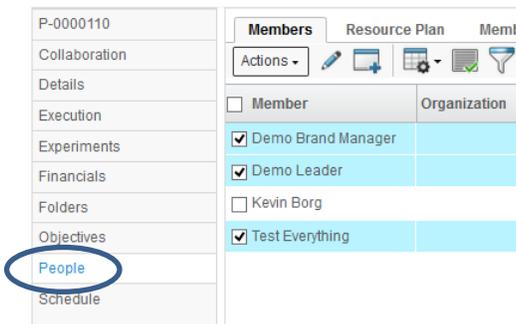
1.15 Resource Loading Report

Resource Loading Report shows the **Full Time Equivalent** (FTE) for selected project members over the time period specified.

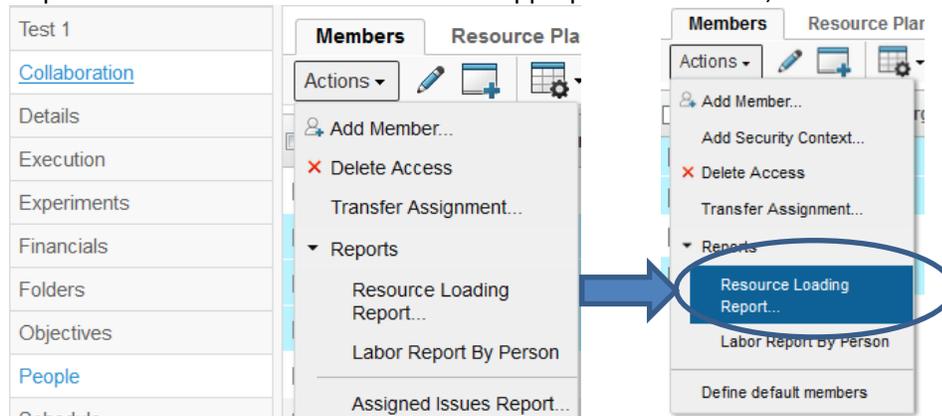
The FTE is calculated based on leaf task (task with no subtasks) resource allocation, is not based on the summary task resource allocation.

| Resource Loading Report | | Weekly | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|-------------------------|--------------|--------------------------------------|--------------|--------------|--------------|-------------|-------------|--------------|--------------|--------------|-------------|--------------|--------------|--------------|-------------|--------------|--------------|--------------|-------------|-------------|--------------|--------------|--------------|-------------|--|--|--|--|--|
| Report Period | | From : Jun 28, 2015 To : Jan 2, 2016 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Name | Jun 28, 2015 | Jul 5, 2015 | Jul 12, 2015 | Jul 19, 2015 | Jul 26, 2015 | Aug 2, 2015 | Aug 9, 2015 | Aug 16, 2015 | Aug 23, 2015 | Aug 30, 2015 | Sep 6, 2015 | Sep 13, 2015 | Sep 20, 2015 | Sep 27, 2015 | Oct 4, 2015 | Oct 11, 2015 | Oct 18, 2015 | Oct 25, 2015 | Nov 1, 2015 | Nov 8, 2015 | Nov 15, 2015 | Nov 22, 2015 | Nov 29, 2015 | Dec 6, 2015 | | | | | |
| Brand Manager, Demo | 0 | 0 | 0 | 0 | 0 | 0 | 0.2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.6 | 2 | 2 | 2 | | | | | |
| Leader, Demo | 0 | 0 | 0 | 0 | 0 | 0 | 1.4 | 3 | 3 | 3 | 3 | 3 | 2.6 | 2 | 2.8 | 4 | 4 | 4 | 4 | 4.4 | 5.4 | 6.6 | 6 | 6 | | | | | |
| Everything, Test | 1.4 | 0 | 0 | 0 | 0 | 0 | 0.4 | 1 | 1 | 1 | 1 | 1 | 0.6 | 0 | 0 | 0 | 0 | 0 | 0 | 0.4 | 1.8 | 3.4 | 4 | 4 | | | | | |

Step 1 Project Lead or project owner selects the **People** command, that lists all the members,
 Step 2 Select the necessary members



Step 3 from the Actions menu selects the appropriate command,



| | | | |
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| Status | Released | | 65 |

Step 4 defines the period related to the report

Resource Loading Period Selection

Weekly
 Monthly
 Quarterly

Date Range From: Jul 1, 2015 To: Jan 1, 2016

Done Cancel

For each selected member, the report shows the FTE load.

- Black means that the load is less or equals to 8 hours
- Yellow means that the load is more than 8 hours but less than 12 hours
- Red means that the load is more than 12 hours
- The value "0" means that the task is assigned to the user but the completion date is out of the selected period

Resource Loading Report Weekly

New Resource Lo...

Report Period From: Jun 28, 2015 To: Jan 2, 2016

| Name | Jun 28, 2015 | Jul 5, 2015 | Jul 12, 2015 | Jul 19, 2015 | Jul 26, 2015 | Aug 2, 2015 | Aug 9, 2015 | Aug 16, 2015 | Aug 23, 2015 | Aug 30, 2015 | Sep 6, 2015 | Sep 13, 2015 | Sep 20, 2015 | Sep 27, 2015 | Oct 4, 2015 | Oct 11, 2015 | Oct 18, 2015 |
|---------------------|--------------|-------------|--------------|--------------|--------------|-------------|-------------|--------------|--------------|--------------|-------------|--------------|--------------|--------------|-------------|--------------|--------------|
| Brand Manager, Demo | 0 | 0 | 0 | 0 | 0 | 0 | 0,2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Leader, Demo | 0 | 0 | 0 | 0 | 0 | 0 | 1,4 | 3 | 3 | 3 | 3 | 3 | 2,6 | 2 | 2,8 | 4 | 4 |
| Everything, Test | 1,4 | 0 | 0 | 0 | 0 | 0 | 0,4 | 1 | 1 | 1 | 1 | 1 | 0,6 | 0 | 0 | 0 | 0 |

Cancel

During the task assignment with the command **Assign Task By Role**, Project Lead can query the Resource Loading Report for a specific user.

By Role

| Task Name | Project Role | Name | Owner | Assignee | Allocation | FTE |
|--|--------------------|--------------------|----------------------------------|--------------------------|------------|-----|
| Project Kick-Off by customer - SOW and LOI available | DE Design Engineer | Test Everything | <input checked="" type="radio"/> | <input type="checkbox"/> | 100.0 | |
| | | Demo Brand Manager | <input type="radio"/> | <input type="checkbox"/> | 100.0 | |
| | | Demo Leader | <input type="radio"/> | <input type="checkbox"/> | 100.0 | |
| Project Kick-off MEM - PRF issued and team formed | | Test Everything | <input checked="" type="radio"/> | <input type="checkbox"/> | 100.0 | |
| | | Demo Leader | <input type="radio"/> | <input type="checkbox"/> | 100.0 | |
| | | Kevin Borg | <input type="radio"/> | <input type="checkbox"/> | 100.0 | |
| Kick-off meeting at customer | | Test Everything | <input checked="" type="radio"/> | <input type="checkbox"/> | 100.0 | |
| | | Demo Leader | <input type="radio"/> | <input type="checkbox"/> | 100.0 | |
| | | Kevin Borg | <input type="radio"/> | <input type="checkbox"/> | 100.0 | |
| | | Demo Brand Manager | <input type="radio"/> | <input type="checkbox"/> | 100.0 | |

Apply Cancel

| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
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Starting from a Resource Loading Report, Project Lead can evaluate the project breakdown for a person, clicking on the person's name.

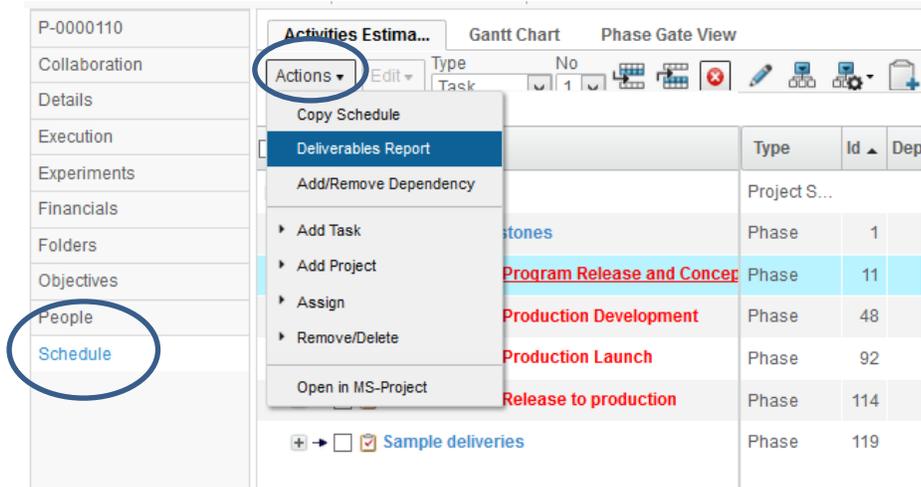
Selecting the task, Project Lead can delegate tasks to other users or change the allocation for a user

| Resource Loading Report | | | Weekly | | | | | | | | | |
|-------------------------|-----------|---|------------------|-------------|--------------|--------------|--------------|-------------|--------------|--------------|--------------|--|
| New Resource Lo... | | | | | | | | | | | | |
| Report Period | | | To : Jan 2, 2016 | | | | | | | | | |
| From : Nov 1, 2015 | | | Nov 1, 2015 | Nov 8, 2015 | Nov 15, 2015 | Nov 22, 2015 | Nov 29, 2015 | Dec 6, 2015 | Dec 13, 2015 | Dec 20, 2015 | Dec 27, 2015 | |
| Leader, Demo | P-0000110 | Vehicle Check (VC/VFF) LOT B-Serie | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| | P-0000110 | Manufacturing Approval | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| | P-0000110 | Make/Buy decision | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| | P-0000110 | Final Tool manufacturer and supplier sourcing | 0 | 0,4 | 0,6 | 0 | 0 | 0 | 0 | 0 | 0 | |
| | P-0000110 | tool manufacturer kick-off | 0 | 0 | 0,2 | 0 | 0 | 0 | 0 | 0 | 0 | |
| | P-0000110 | tool design design reviews and approval from Customer | 0 | 0 | 0,2 | 1 | 1 | 1 | 1 | 0,8 | 0 | |
| | P-0000110 | tool manufacture | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0,2 | 1 | |
| | P-0000110 | PFMEA + QCP for each tool and component | 0 | 0 | 0,2 | 1 | 1 | 1 | 1 | 1 | 1 | |
| | P-0000110 | STA review assessment and feedback to tool manufacturer | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| | P-0000110 | tool manufacture | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0,2 | 1 | |
| | P-0000110 | QCP for each component | 0 | 0 | 0,2 | 1 | 1 | 1 | 1 | 1 | 1 | |
| | P-0000110 | Lab jigs manufacture and install in place | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | |
| | P-0000110 | Lab jigs commissioning for DV testing | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| | P-0000110 | Paint jigs manufacture / laser etching programing and try out | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| | P-0000110 | Paint sourcing | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |

| | | | |
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1.16 Deliverables Report

This report shows the deliverable situation for a project and can be generated for all the tasks of the WBS or for a selected WBS task.



Step 1 The Project Lead selects the Schedule command and then the selects the tasks he wants to add to the report.

For any task, the report displays some task details, such as the estimated end date and current state.

Deliverable information for the task includes the deliverable type and any files associated with the deliverable

| Deliverables Report | | | | | | | | | | |
|--|----|---------------|--------|------|-----------|-------|------|---------------------|-----|-----|
| Schedule Task Details | | | | | | | | | | |
| Name | Id | Est. End Date | State | % | Assignee | Type | Name | Files | Rev | Ver |
| <input checked="" type="checkbox"/> Gate 1 Manufacturing Engi | 28 | Sep 23, 2015 | Assign | 0.0 | Test E... | | | | | |
| <input checked="" type="checkbox"/> Initial quotes 'to and from' t | 35 | Nov 11, 2015 | Assign | 0.0 | Test E... | | | | | |
| <input checked="" type="checkbox"/> Kick-off meeting at custom | 19 | Jul 1, 2015 | Active | 20.0 | Test E... | Do... | D... | [Linea+Trasporto... | 0 | [1] |
| <input checked="" type="checkbox"/> Lab jigs design | 37 | Oct 7, 2015 | Assign | 0.0 | Demo... | | | | | |
| <input checked="" type="checkbox"/> Manage the Project Tasks | 12 | Nov 11, 2016 | Assign | 0.0 | Demo... | | | | | |
| <input checked="" type="checkbox"/> Methode recieves all design | 21 | Aug 12, 2015 | Assign | 0.0 | Demo... | Do... | D... | [a.txt] | 0 | [1] |
| P-0000110 | | Mar 7, 2017 | Active | 0.1 | | | | | | |
| <input checked="" type="checkbox"/> Paint jigs design | 38 | Sep 23, 2015 | Assign | 0.0 | Demo... | | | | | |
| <input checked="" type="checkbox"/> PCBA assembly line requir | 41 | Oct 7, 2015 | Assign | 0.0 | Demo... | | | | | |

Project Lead can see all deliverables linked to the tasks using Project Schedule table; the column  shows, for each task, the number of deliverables contained and an icon for the first three deliverables. Clicking on the number a window opens in popup with all task deliverables; clicking on the icon, the file can be downloaded.

| | | | |
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| Activities Estima... | | | | | | |
|----------------------|--------------|-------------|------------|-----------------|---|----------|
| | | Gantt Chart | | Phase Gate View | | |
| Actions | | Type | No | | | |
| | | Task | 1 | | | |
| Name | Type | Id | Dependency | | | |
| P1 | Project S... | | | | 0 | 5 (2) |
| PLS PHASE 1 - P | Phase | 1 | | | 0 | 0 |
| Project Kick-C | Task | 2 | | | 0 | 0 |
| Project Kick-o | Task | 3 | 2:FS+0.0 d | 2 | 0 | 0 |
| Quality Activi | Task | 4 | | | 0 | 0 |
| Gate 1 - Review | Gate | 6 | 4:FS+0.0 d | | 0 | 0 |
| PLS PHASE 2 - P | Phase | 7 | | | 0 | 0 |
| Switch comp | Task | 8 | | | 0 | 0 |
| Make-Buy c | Task | 9 | | | 0 | 1 |

| | | | |
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1.17 Experiments

This command lists the experiment projects created from a master project.

It's used to perform a "what if" analysis on an active project without altering the master project.

Experiments can be merged back to the master project.

| Name ▲ | Diff. | Type |
|--------|-------|---------------|
| Test 1 | 0.0 | Project Space |

1.17.1 Create a new experiment



The command associated to the  icon, copies the master project into a new experiment. The following warning is shown to the user.

Experiment creation may take time (upto several minutes) depending on the size of the project. Email Notification will be sent once Experiment is created. Do you want to continue?

OK

Cancel

If the Project Lead continues a new experiment project is generated.

| Name ▲ | Diff. | Type | State | Duration | Start Date | End Date | Descrip |
|-------------|-------|---------------|--------|------------|--------------|--------------|-----------|
| Test 1 | 0.0 | Project Space | Create | 571.25 ... | Oct 23, 2015 | Feb 12, 2018 | test 1 la |
| Exp-0000158 | 0.0 | Experiment | Create | 571.25 ... | Oct 23, 2015 | Feb 12, 2018 | test 1 la |

| Name | Type | Id | Dependency | State | Constraint Type |
|-----------------|-------|-----|--------------|--------|---------------------|
| Sample deliveri | Phase | 160 | | Create | As Soon As Possible |
| PT2-0-Serie - | Task | 177 | | Create | As Soon As Possible |
| Methode int | Task | 182 | 170:FS+0.0 d | Create | As Soon As Possible |
| Customer e | Task | 181 | 180:FS+0.0 d | Create | As Soon As Possible |
| Send meas | Task | 180 | 179:FS+0.0 d | Create | As Soon As Possible |

| | | | |
|---------|----------|-------|------------------|
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1.17.2 View an experiment

The Project Lead selects the link in the **Difference** cell that opens the experiment project schedule in the bottom part of the window

The screenshot displays the 'Experiments' section of a software interface. On the left, a sidebar lists navigation options: Test 1, Collaboration, Details, Execution, Experiments (highlighted), Financials, and Folders. The main area shows a table with columns 'Name' and 'Diff.'. The table contains two rows: 'Test 1' with a 'Diff.' of '0.0' and 'Exp-0000158' with a 'Diff.' of '0.0'. A blue circle highlights the '0.0' value in the 'Exp-0000158' row. A blue arrow points from this circle to a 'Structure' table below, which is also circled in blue. The 'Structure' table has columns 'Name', 'Type', 'Id', 'Dependency', 'State', and 'Constraint Type'. It lists several tasks: 'Sample delivery' (Phase, Id 160), 'PT2-0-Series' (Task, Id 177), 'Method int' (Task, Id 182, Dependency '170:FS+0.0 d'), 'Customer s' (Task, Id 181, Dependency '180:FS+0.0 d'), and 'Send mes' (Task, Id 180, Dependency '179:FS+0.0 d').

| | | | |
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The icon opens the same task in the master project

| Structure | | Gantt Chart | | | | | | | |
|--------------------------|-----------------|-------------|------------|-------------|--------|-------------------|--------------|------------|------------|
| Name | Type | No | Id | Dependency | State | Constraint | Estimated | | |
| Constraint Type | Constraint Date | Duration | Start Date | | | | | | |
| Exp-0000126 | Experiment | | | | Create | As Soon As Pos... | Jul 21, 2015 | 443.0 Days | Jul 21, 20 |
| Customer Milestones | Phase | 1 | | | Create | As Soon As Pos... | | 393.0 Days | Jul 21, 20 |
| PLS PHASE 1 - Program | Phase | 11 | | | Create | As Soon As Pos... | | 360.0 Days | Jul 21, 20 |
| Manage the Project | Task | 12 | | | Create | As Soon As Pos... | | 360.0 Days | Jul 21, 20 |
| Project Kick-Off by cust | Task | 17 | | | Create | As Soon As Pos... | | 0.0 Days | Jul 21, 20 |
| Project Kick-off MEM - F | Task | 18 | | 17:FS+0.0 d | Create | As Soon As Pos... | | 5.0 Days | Jul 21, 20 |
| Kick-off meeting at cust | Task | 19 | | 17:FS+0.0 d | Create | As Soon As Pos... | | 1.0 Days | Jul 21, 20 |
| Product Design Phase | Task | 20 | | | Create | As Soon As Pos... | | 97.0 Days | Jul 22, 20 |
| Process Design Phase | Task | 36 | | | Create | As Soon As Pos... | | 100.0 Days | Sep 2, 20 |
| Quality Activites | Task | 44 | | | Create | As Soon As Pos... | | 75.0 Days | Sep 2, 20 |

Clicking on a cell in the Dependency column, a new window opens that shows the related task

| Name | Type | Id | Dependency |
|------------------------|--------------|----|---------------------------|
| Test 1 | Project S... | | |
| Customer Milestones | Phase | 1 | |
| Supplier Nomination | Task | 2 | |
| Design Freeze | Task | | 47:FS+0.0 d |
| Parts from 1st Tooling | Task | 4 | 108:FS+0.0 d 120:FS+0.0 d |

Design Freeze : Work Breakdown Structure - Mozilla Firefox

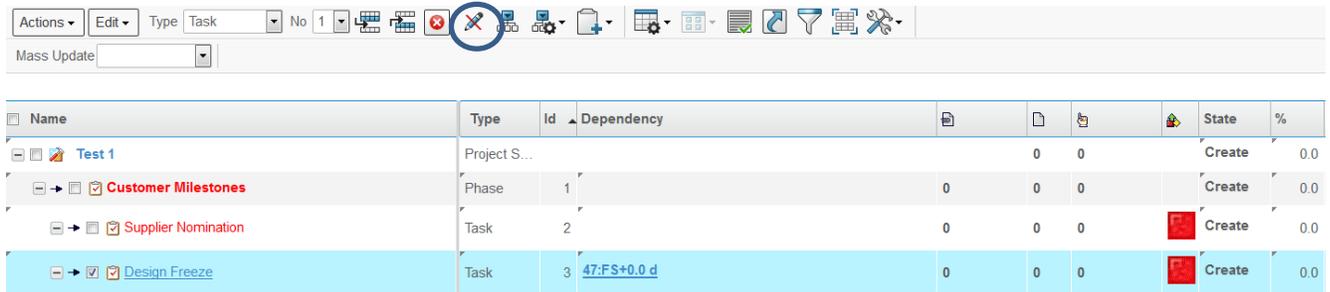
cad-srv-apdev.methode-emea.local:9090/3dSPACE/common/emxindentedTable.jsp?tableMenu=PMCWBSTableMenu&

Design Freeze : Work Breakdown Structure | Filter: Task Schedule View, Tasks

| Name | Type | Id | Dependency |
|---------------|------|----|--------------------|
| Design Freeze | Task | | 25:SS+35.0 d 0 0 0 |

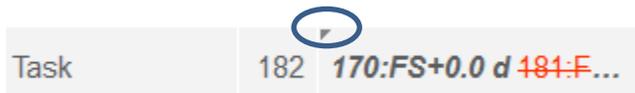
| | | | |
|---------|----------|-------|------------------|
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To modify the details of a task, select it then click on the  icon to activate the edit mode.



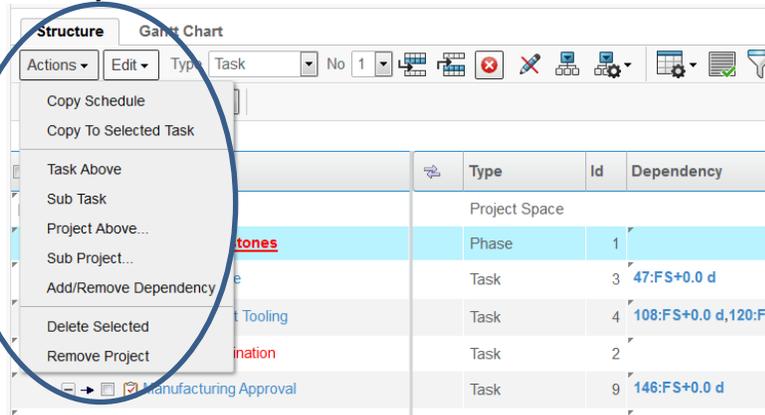
| Name | Type | Id | Dependency | State | % |
|---------------------|--------------|----|-------------|--------|-----|
| Test 1 | Project S... | | | Create | 0.0 |
| Customer Milestones | Phase | 1 | | Create | 0.0 |
| Supplier Nomination | Task | 2 | | Create | 0.0 |
| Design Freeze | Task | 3 | 47:FS+0.0 d | Create | 0.0 |

The Project Lead can change the Dependency parameters modifying by hand the values using the correct syntax. In this case he has to click on the small triangle on the upper left side of the cell.



| | | |
|------|-----|-----------------------|
| Task | 182 | 170:FS+0.0 d 181:F... |
|------|-----|-----------------------|

The Project Lead can also use the available commands of the Actions menu.



| Type | Id | Dependency |
|------------------------|----|--------------------|
| Project Space | | |
| Customer Milestones | 1 | |
| Design Freeze | 3 | 47:FS+0.0 d |
| Tooling | 4 | 108:FS+0.0 d,120:F |
| Supplier Nomination | 2 | |
| Manufacturing Approval | 9 | 146:FS+0.0 d |

| | | | |
|---------|----------|-------|------------------|
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1.17.3 Compare and Sync



The command compares the master project with the selected experiment

| Name | Diff. | Type | State | Duration | Start Date |
|-------------|-------|---------------|--------|------------|------------|
| Test 1 | 0.0 | Project Space | Create | 571.25 ... | Oct 23, |
| Exp-0000158 | 0.0 | Experiment | Create | 571.25 ... | Oct 23, |

| Name | Type | Id | Dependency |
|-----------------|-------|-----|------------|
| Sample deliveri | Phase | 160 | |
| PT2-0-Serie | Task | 177 | |

The system shows in a new window the highlighted differences between the projects

| | | | | Estimated | | | | | |
|------------------|-----------|----|-------------------------|------------|--------------|---------------------------|-----------|----|--------------|
| Name | Type | Id | Dependency | Duration | Start Date | Name | Type | Id | Dependency |
| Exp-0000126 | Experi... | | | 443.0 Days | Jul 21, 2015 | PDPLS 4 | Projec... | | |
| Customer Milesto | Phase | 1 | | 393.0 Days | Jul 21, 2015 | Customer Milestones | Phase | 1 | |
| Supplier Nomin | Milest... | 2 | | 0.0 Days | Jul 21, 2015 | Supplier Nomination | Milest... | 2 | |
| Design Freeze | Milest... | 3 | 26:FS+0.0 d | 0.0 Days | Sep 2, 2015 | Design Freeze - Mec... | Milest... | 3 | 26:FS+0.0 d |
| Parts from 1st | Milest... | 4 | 55:FS+0.0 d,69:FS+0.... | 0.0 Days | Apr 7, 2016 | Parts from 1st Toolin... | Milest... | 4 | 56:FS+0.0 d, |
| Vehicle Check | Milest... | 5 | 141:FS+0.0 d | 0.0 Days | Apr 21, 2016 | Vehicle Check (VC/V... | Milest... | 5 | 142:FS+0.0 c |
| Plant Trial (PT) | Milest... | 6 | 149:FS+0.0 d | 0.0 Days | May 19, 2016 | Plant Trial (PT/PVS/... | Milest... | 6 | 150:FS+0.0 c |
| Plant Trial (PT) | Milest... | 7 | 157:FS+0.0 d | 0.0 Days | Aug 25, 2016 | Plant Trial (PT/0-Seri... | Milest... | 7 | 158:FS+0.0 c |
| PSW (KO/Not) | Milest... | 8 | 124:FS+0.0 d | 0.0 Days | Jan 16, 2017 | PSW (KO/Note 1/PP... | Milest... | 8 | 125:FS+0.0 c |
| Manufacturing | Milest... | 9 | 118:FS+0.0 d | 0.0 Days | Oct 12, 2016 | Manufacturing Approval | Milest... | 9 | 119:FS+0.0 c |
| Start of Agree | Milest... | 10 | | 0.0 Days | Jul 21, 2015 | Start of Agreement - ... | Milest... | 10 | |

159 objects, 2 selected

| | | | |
|---------|----------|-------|------------------|
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PM02 Gate Management

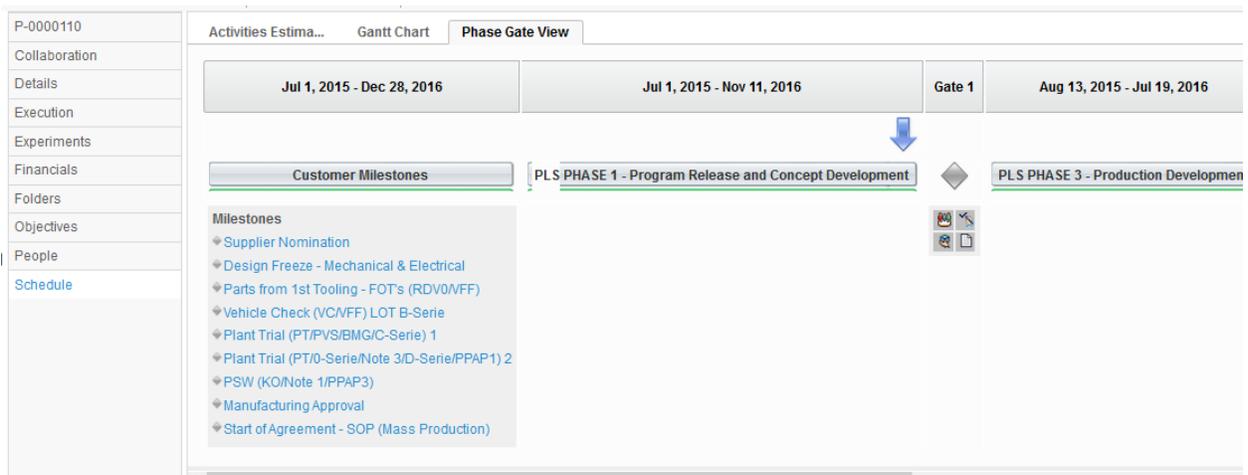
| | | | |
|---------------------|---|---------------|--------|
| Purpose | Manage project gates and checklists | Status | Define |
| Stakeholders | Project Administrator | | |
| Beginning | | | |
| Interactions | Project Lead can create and update project gate, defining checklist items. Project users can complete checklist items. | | |
| End | | | |
| Constraints | | | |

2.1 Gate Review

During a gate review, deliverables can be defined and decisions are captured.

Gate review can be tracked using Meetings and Discussions.

Based on a gate decision, a project can be approved, canceled, or put on hold

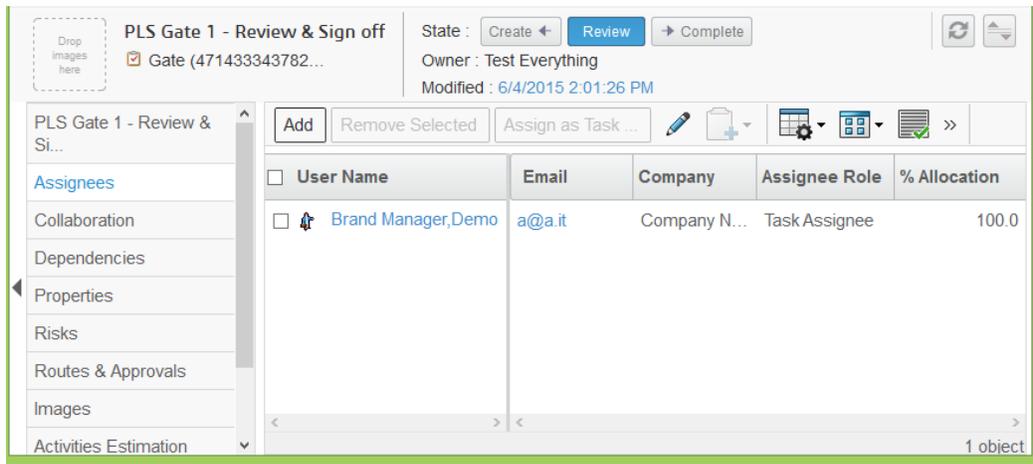


| | | | |
|---------|----------|-------|------------------|
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2.2 Gate Assignees

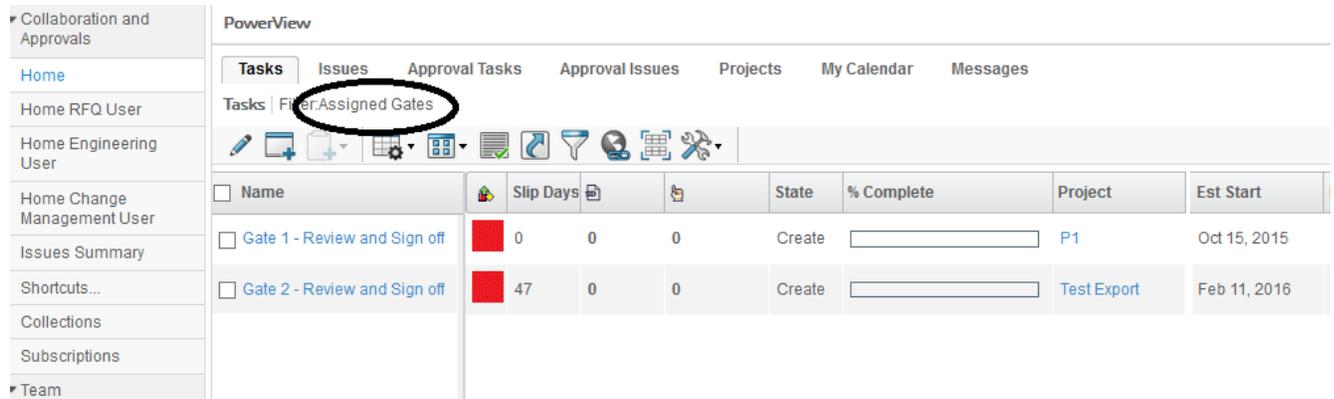
Project Lead can define people assigned to the gate.

They can be project members or from outside the project



Gate assignees receive a notification in order to update checklist items. They can see the Gate content, can edit the checklist item but are not able to approve the gate

Using table Tasks, Gate assignees can see all Gates assigned (use filter Assigned Gates).



| | | | |
|---------|----------|-------|------------------|
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2.3 Gate Deliverables

During a gate review, Gate assignee and Project Lead can upload deliverables; the functions are the same described for tasks

The screenshot shows a web application interface for a gate review. At the top, there's a header for 'PLS Gate 1 - Review & Sign off' with a state dropdown set to 'Review' and buttons for 'Create', 'Review', and 'Complete'. Below the header, there are icons for status and a close button. The main content area is divided into two tabs: 'Deliverables' and 'Checklists'. The 'Deliverables' tab is active, showing a toolbar with various actions like 'Create New', 'Upload Files...', 'Add Existing...', 'Remove', 'Download', 'Checkout', and 'Add to Folder...'. The 'Create New' button is highlighted with a blue circle. Below the toolbar is a table with columns: Title, Rev, Ver, Type, Actions, and Description. The table is currently empty, displaying 'No Objects Found' in the center. On the left side, there is a sidebar with a list of navigation options: Assignees, Collaboration, Dependencies, Properties, Risks, Routes & Approvals, Images, Activities Estimation, and Multiple Ownership Access. At the bottom left, there is a small text box containing 'javascript:void(0)'. The interface has a clean, modern design with a light gray background and blue accents.

| | | | |
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2.4 Gate Checklist Item

A checklist is a collection of checklist items that are evaluated for making gate decisions. Project Lead and Gate assignees are able to enter values for Response and Comments fields.

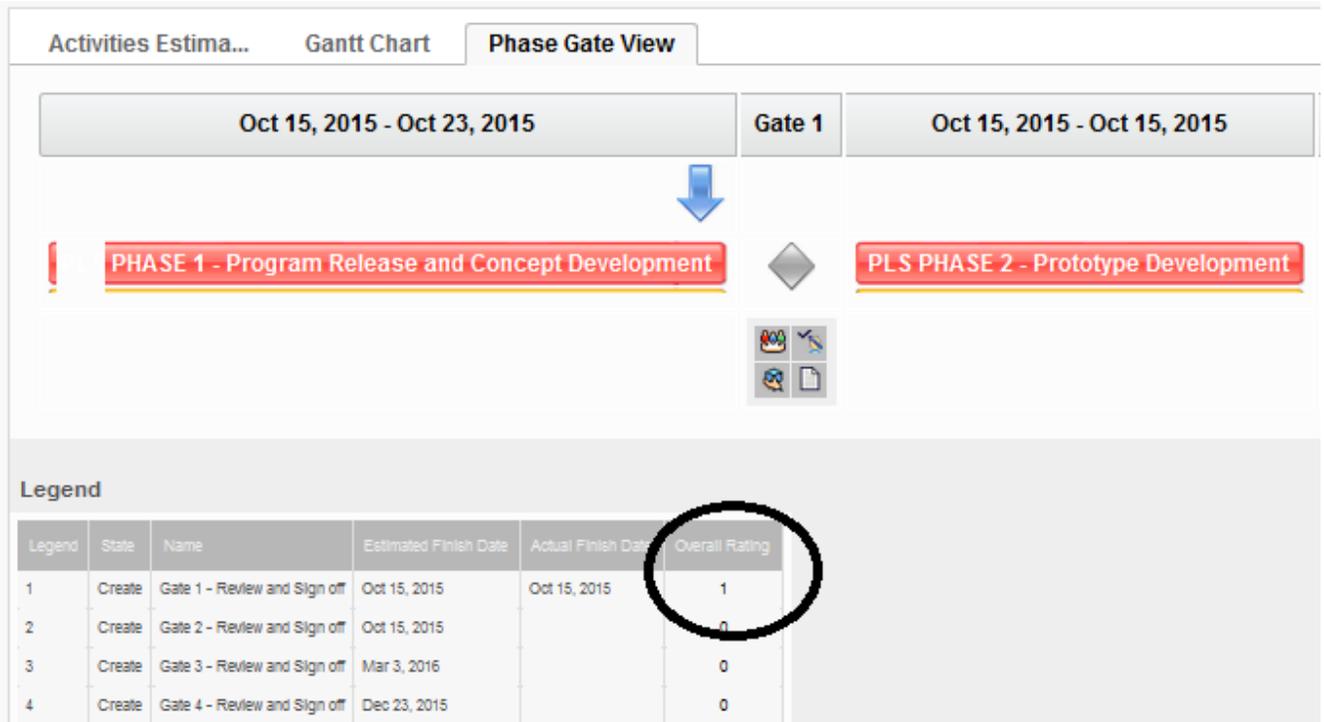
| Name | Responsible | Description | Response Type | Response | Comments |
|-----------------|-------------|----------------------------------|---------------|----------|----------|
| CI_Reviewed | | Reviewed and signed off (CO... | N/A 1 2 3 4 5 | N/A | |
| CI_Submitted | | Submitted RFQ package avai... | N/A 1 2 3 4 5 | 3 | 3 |
| CH_05. Deviatio | | 05. Deviation checklist | | | |
| CI_Customer | | Customer Terms & Conditio... | N/A 1 2 3 4 5 | 4 | 4 |
| CH_06. Purchas | | 06. Purchase Orders | | | |
| CI_NRE orde | | NRE order issued and relea... | N/A 1 2 3 4 5 | | |
| CH_07. Program | | 07. Program Funding Release | | | |
| CI_Program F | | Program Release Customer ... | N/A 1 2 3 4 5 | | |
| CI_Program F | | Program Release Internal M... | N/A 1 2 3 4 5 | | |
| CH_08. Design | | 08. Design Goals understood? | | | |
| CI Design In | | Design Input Data Checklist i... | N/A 1 2 3 4 5 | | |

After the Response values are entered and saved, a dedicate column shows the same value with a background color related to response value, in order to fast view of gate checklist values

| Response | Comments |
|----------|----------|
| 3 | 3 |
| 3 | 3 |
| 3 | 3 |
| 4 | 4 |
| 1 | 1 |
| 1 | 1 |
| 5 | 5 |

The Project Lead, using the Phase and Gate view, can see the rating for all checklist item values related to the Gates.

| | | | |
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| Status | Released | | 78 |



Overall rating cells contain a value retrieved with a formula using checklist item values; if all items are evaluated, the cell is also colored.

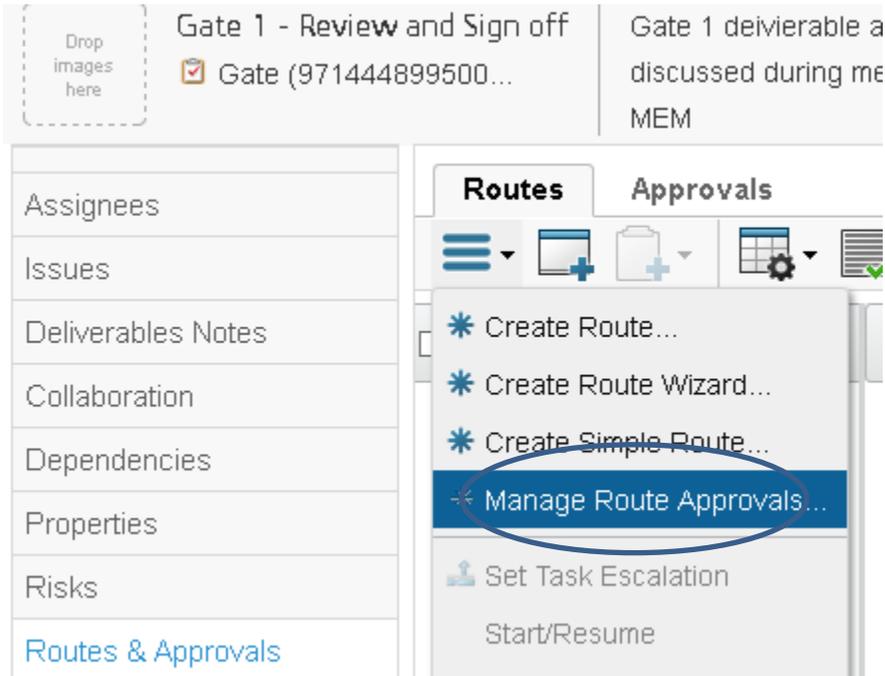
| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 79 |

2.5 Gate Approval

Project Lead is responsible to approve, cancel or hold the project.

In order to define an approval process related to several roles, Project Lead has to create a Route process:

- Select command «Routes and Approvals»
- Select Manage Route Approvals to use an approval process template



Define a Route between states Create and Review, using a Route Template

If a second approval is needed, define a route between states Review and Complete

| Manage Route Approvals | | |
|--|-----------------|---|
| States | Existing Routes | New Route |
| Create | | Approve GATE <input type="text"/> <input type="button" value="..."/> <input type="button" value="Clear"/> |
| Review | | <input type="text"/> <input type="button" value="..."/> <input type="button" value="Clear"/> |
| Complete | | Not allowed for last state |
| <input type="button" value="Apply"/> <input type="button" value="Done"/> <input type="button" value="Cancel"/> | | |

A Route Template is a list of users and/or roles that has to approve the Gate.

As for task approval, each user involved has to approve or reject the Gate.

| | | | |
|---------|----------|-------|------------------|
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If the Gate is rejected, the Project Lead can modify the checklist and resume the Route process

| Title | Order | Revision | State | Assignee | Action |
|---------------|-------|----------|----------|--|---------|
| Approval G... | 1 | 1 | Assigned | DE Senior Design Engineer(Role) | Approve |
| Approval G... | 1 | 1 | Assigned | LM Senior Launch Manager(Role) | Approve |
| Approval G... | 1 | 1 | Assigned | LT Senior Lab Technician(Role) | Approve |
| Approval G... | 1 | 1 | Assigned | ME Senior Manufacturing Engineer(Role) | Approve |
| Approval G... | 1 | 1 | Assigned | MGR Senior Manager(Role) | Approve |
| Approval G... | 1 | 1 | Assigned | OM Senior Operations Manager(Role) | Approve |
| Approval G... | 1 | 1 | Assigned | PURCH Senior Purchasing(Role) | Approve |
| Approval G... | 1 | 1 | Assigned | QE Senior Quality Engineer(Role) | Approve |
| Approval G... | 1 | 1 | Assigned | S Senior Sales(Role) | Approve |

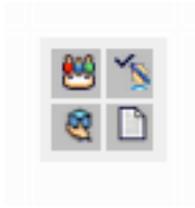
If Route process is completed, Project Lead can complete the Gate, approving or cancelling the project.



- **Approve:** approves the project to continue. Creates a Decision with the name "Approve". All the task that the gate depends on must be completed before you can approve the gate.
- **Conditional Approve:** approves the project to continue under certain conditions. Creates a Decision with the name "Conditional Approve".
- **Hold:** puts the project on hold. Creates a Decision with the name "Approve".
- **Cancel:** for a project in Active or Hold state, this cancels the project. Creates a Decision with the name "Cancel". All tasks that the gate depends on are ignored.
- **Resume:** puts the project back to the state from which it was put. Creates a Decision with the name "Resume".

| | | | |
|---------|----------|-------|------------------|
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Decision



| Decisions | | | | | | |
|----------------------------------|----------|----------|--|-------|------------------|------------------|
| <input type="checkbox"/> Name ▲ | Type | Revision | | Title | FromContext | Description |
| <input type="checkbox"/> Approve | Decision | 14334... | | | General Decision | Phase 1 approved |

1 object

| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 82 |

PM03 Collaboration

| | | | |
|---------------------|--|---------------|--------|
| Purpose | Define and manage project template | Status | Define |
| Stakeholders | Project Administrator | | |
| Beginning | | | |
| Interactions | Project Administrator can create and update project template, used to create project with a standard structure | | |
| End | | | |
| Constraints | | | |

The Project and any objects contained (phases, gates and tasks) can be involved in meetings and decisions.

Drop
Images
Here

Customer Milestones

Phase (901442153563...
PDPLS - Template PDPLS

State : Create → Assign

Owner : laura.bonello

Modified : Jan 15, 2016 9:33:35 PM

Customer Milestones

Bookmarks

Decisions

Meetings

| Name ▼ | Relationship | Description | Mee |
|------------------|--------------|-------------|-----|
| No Objects Found | | | |

- Assignees
- Issues
- Collaboration
- Deliverables
- Dependencies
- Properties
- Questions
- Routes & Approvals

| | | | |
|---------|----------|-------|------------------|
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3.1 Meetings

From the page select the Meetings tab that lists all the meetings related to a project. Meetings can be related also to phases, gates and tasks.

| Name | Relationship | Type | Owner | State | Topic Item(s) | Description | Meeting Date | Start Time | Duration in Minutes | Actions |
|-----------|--------------|---------|-----------------|--------|-----------------|-------------|--------------|------------|---------------------|---------|
| M-0000100 | | Meeting | Test Everything | Create | | Review ... | Apr 3, 2012 | 8:30 AM | 60.0 | |
| M-0000101 | | Meeting | Test Everything | Create | | Review ... | Oct 4, 2012 | 8:30 AM | 60.0 | |
| M-0000102 | | Meeting | Test Everything | Create | | Review ... | May 2, 2012 | 8:30 AM | 60.0 | |
| M-0000103 | | Meeting | Test Everything | Create | Test Everything | Review ... | May 4, 2012 | 8:30 AM | 60.0 | |
| M-0000104 | | Meeting | Test Everything | Create | | Review ... | May 15, 2012 | 8:30 AM | 60.0 | |
| M-0000105 | | Meeting | Test Everything | Create | | Review ... | May 24, 2012 | 8:30 AM | 60.0 | |
| M-0000106 | | Meeting | Test Everything | Create | | Review ... | Jul 4, 2012 | 8:30 AM | 60.0 | |
| M-0000107 | | Meeting | Test Everything | Create | | Review ... | Jul 31, 2012 | 8:30 AM | 60.0 | |
| M-0000108 | | Meeting | Test Everything | Create | | Review ... | Sep 6, 2012 | 8:30 AM | 60.0 | |
| M-0000109 | | Meeting | Test Everything | Create | | Review ... | Oct 5, 2012 | 8:30 AM | 60.0 | |
| M-0000110 | | Meeting | Test Everything | Create | | Review ... | Oct 11, 2012 | 8:30 AM | 60.0 | |
| M-0000111 | | Meeting | Test Everything | Create | | Review ... | Oct 25, 2012 | 8:30 AM | 60.0 | |
| M-0000112 | | Meeting | Test Everything | Create | | Review ... | Nov 22, 2012 | 8:30 AM | 60.0 | |
| M-0000113 | | Meeting | Test Everything | Create | | Review ... | Jan 9, 2013 | 8:30 AM | 60.0 | |
| M-0000114 | | Meeting | Test Everything | Create | | Review ... | Aug 15, 2013 | 8:30 AM | 60.0 | |

3.1.1 Creation

The following are mandatory fields during the creation of a meeting

- Subject
- Meeting Date
- Start time
- Duration

P-0000110[Create Meeting]

Fields in red italics are required

Name
 AutoName

Type
 Meeting

Subject

Meeting Location

Context
 P-0000110

Description

Meeting Date

Start Time
 8:30 AM

Duration in Minutes

Conference Call Number

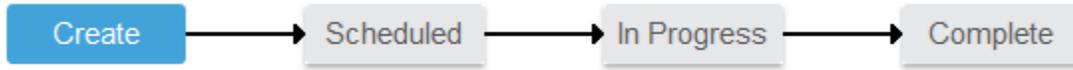
Done Cancel

| | | | |
|---------|----------|-------|------------------|
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| Status | Released | | 84 |

3.1.2 Lifecycle

The following are the state of the lifecycle of a meeting

- Create: owner can define item agenda and attendees
- Scheduled: attendees are notified
- In Progress: meeting is started
- Complete



3.1.3 Attendees

Meeting owner can add also people not related to the project

| Name | Work Phone Number | Email Address | Company |
|---|-------------------|--------------------|--------------|
| <input type="checkbox"/> DemoBrandManager | | a@a.it | Company Name |
| <input type="checkbox"/> DemoLeader | | a@a.it | Company Name |
| <input type="checkbox"/> kevinb | | Kevin.Borg@meth... | Company Name |
| <input type="checkbox"/> Test Everything | (123)322-2004 | warren@Test2 Cu... | Company Name |

4 objects

3.1.4 Attachments

Meeting owner and attendees can attach new documents or connect existing document

| Name | Title | Rev | Ver | Type | Actions | Description |
|------------------------------|-----------------------|-----|-----|----------|---------------------|-------------------|
| <input type="checkbox"/> 0/1 | Supplier Samsung spec | 0 | 1 | Document | [Icons for actions] | PCB specification |

Page 1 of 1

| | | | |
|---------|----------|-------|------------------|
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3.1.5 Decisions

The Decisions commands lists the decisions related to the meeting.

The screenshot shows a software interface for a meeting. The top header includes the meeting ID 'M-0000100', the title 'Review project Status', and the state 'Create' and 'Scheduled'. The owner is 'Test Everything' and it was modified on '6/5/2015 11:04:29 AM'. A sidebar on the left contains navigation options: 'Agenda Items', 'Attachments', 'Attendees', 'Decisions' (highlighted with a red circle), 'Lifecycle', and 'History'. The main content area displays a table of decisions:

| Name | Type | Revision | Title | FromContext | Description | Owner |
|-------------------------------------|---------|----------|--------|--------------|--------------------------------|-------|
| <input type="checkbox"/> DEC-000001 | Deci... | 1 | PCB... | General D... | New PCB approved | Te |
| <input type="checkbox"/> DEC-000002 | Deci... | 1 | Spe... | General D... | Specification need to be co... | Te |

At the bottom right of the table area, it indicates '2 objects'.

| | | | |
|---------|----------|-------|------------------|
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3.2 Decisions

User can save and track decisions taken during a meeting or decision taken for a project. A decision can be related to the project itself or to project meetings. Decision can be related also to phases, gates and tasks

The screenshot shows a software interface with a sidebar on the left containing various project management categories like 'Collaboration', 'Details', 'Execution', etc. The main area has tabs for 'Bookmarks', 'Decisions', 'Discussions', and 'Meetings'. The 'Decisions' tab is active and circled in blue. Below the tabs is a toolbar with various icons. A table displays a list of decisions:

| Name | Type | Revision | Title | FromContext | Description |
|------------|-------|----------|--------------|---------------|------------------|
| DEC-000004 | De... | 1 | Customer ... | General De... | Project Kick-Off |

Below this table is a 'Related Decisions' section with another table:

| Name | Type | Title | Description |
|------------|-------|---------------|-------------------------------|
| DEC-000001 | De... | PCB Samsung | New PCB approved |
| DEC-000002 | De... | Specification | Specification need to be c... |

3.2.1 Creation

The following are mandatory fields during the creation of a decision:

- Name (an auto naming feature is provided)
- Title and description are not mandatory

P-0000110[Create Decision]

Fields in red italics are required

Type ...

Name AutoName

Vault ...

Title

Description

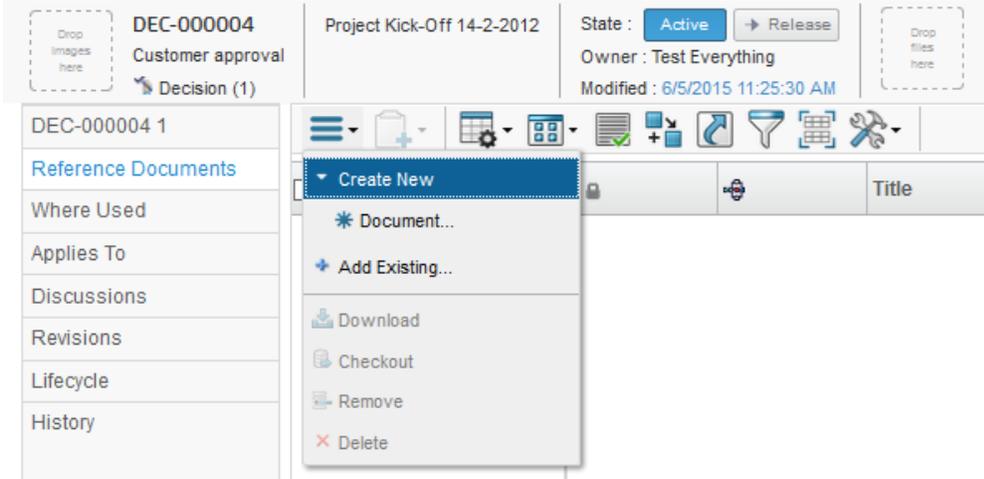
Owner ... [Clear](#)

Track Applicability ▾

| | | | |
|---------|----------|-------|------------------|
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| Status | Released | | 87 |

3.2.2 Reference Documents

Lists the documents checked into the decision. User can upload new documents (drag & drop or create manually) or add an existing document



| | | | |
|---------|----------|-------|------------------|
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| Status | Released | | 88 |

PM04 Open Issue Deck

| | | | |
|---------------------|---|---------------|--------|
| Purpose | Define and manage project template | Status | Define |
| Stakeholders | Project Administrator | | |
| Beginning | Creation of an issue | | |
| Interactions | Project Lead can create and update project issues | | |
| End | Closure of issues | | |
| Constraints | | | |

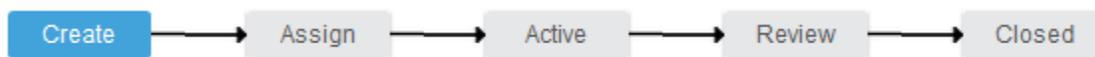
Issues table contains all issues connected to the project and all issues connected to the project tasks.

| Name | Edit | Reported Against | Classification | Description | Visibility | Domain | Action Taken | Priority | % Complete | Assignees | Edit | Approv |
|------------|------|------------------|--------------------|--------------------------------|------------|--------|-------------------|----------|------------|----------------------------|------|--------|
| ISS-000007 | | PDPLS 1 | Issue - A probl... | Customer drawings | External | Design | 13.9.11 - Su... | Low | 50 | Kevin Borg Evan String | | |
| ISS-000008 | | PDPLS 1 | Issue - A probl... | Internal drawings + tollera... | External | Design | 13.9.11 - Th... | Low | 50 | Kevin Borg | | |
| ISS-000009 | | PDPLS 1 | Issue - A probl... | Connector colours | External | Design | 13.9.11 - To... | Low | 50 | Kevin Borg | | |
| ISS-000010 | | PDPLS 1 | Issue - A probl... | Size of graphic | External | Design | 13.9.11 - Fin... | Low | 50 | Kevin Borg | | |
| ISS-000011 | | PDPLS 1 | Issue - A probl... | Illumination (graphic) | External | Design | 13.9.11 - No... | Low | 50 | Test Everytl | | |
| ISS-000012 | | PDPLS 1 | Issue - A probl... | Illumination JEWEL | External | Design | 03.05.12 - In... | Low | 50 | Test Everytl | | |
| ISS-000013 | | PDPLS 1 | Issue - A probl... | DFMEA | External | Design | 13.9.11 - Stil... | Low | 50 | Test Everytl | | |
| ISS-000014 | | PDPLS 1 | Issue - A probl... | Header | External | Design | 13.9.11 - JL... | Low | 50 | Kevin Borg | | |
| ISS-000015 | | PDPLS 1 | Issue - A probl... | Plunger | External | Design | 13.9.11 - ne... | Low | 80 | Test Everytl Kevin Borg | | |

4.1 Issue Lifecycle

The following is the Lifecycle of an issue:

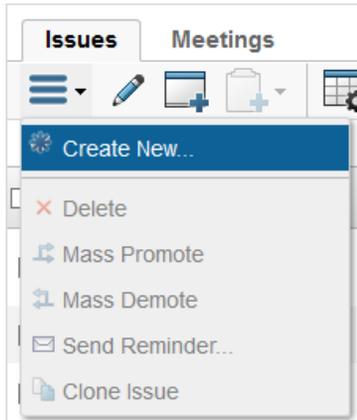
- Create: a user can create an issue against a Project or a task
- Assign: Project Lead has to define one or more assignees; users will be notified. Estimated Dates have to be entered.
- Active: assigned user has to work to solve the issue
- Review: if specified, a user has to approve and close the Issue
- Closed: Issue is solved and Actual Finish Date is compiled



| | | | |
|---------|----------|-------|------------------|
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4.2 Issue Creation

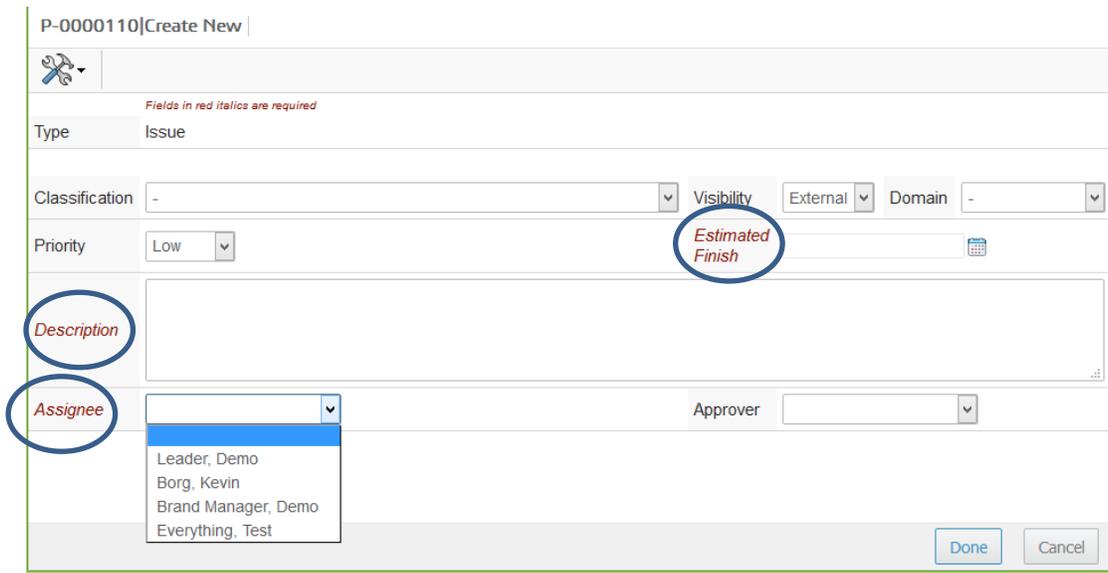
Under the Issue tab, in the Actions menu there are all the command to manage the issue.



Creation

The Create New command allow all the Project members to create a new issue

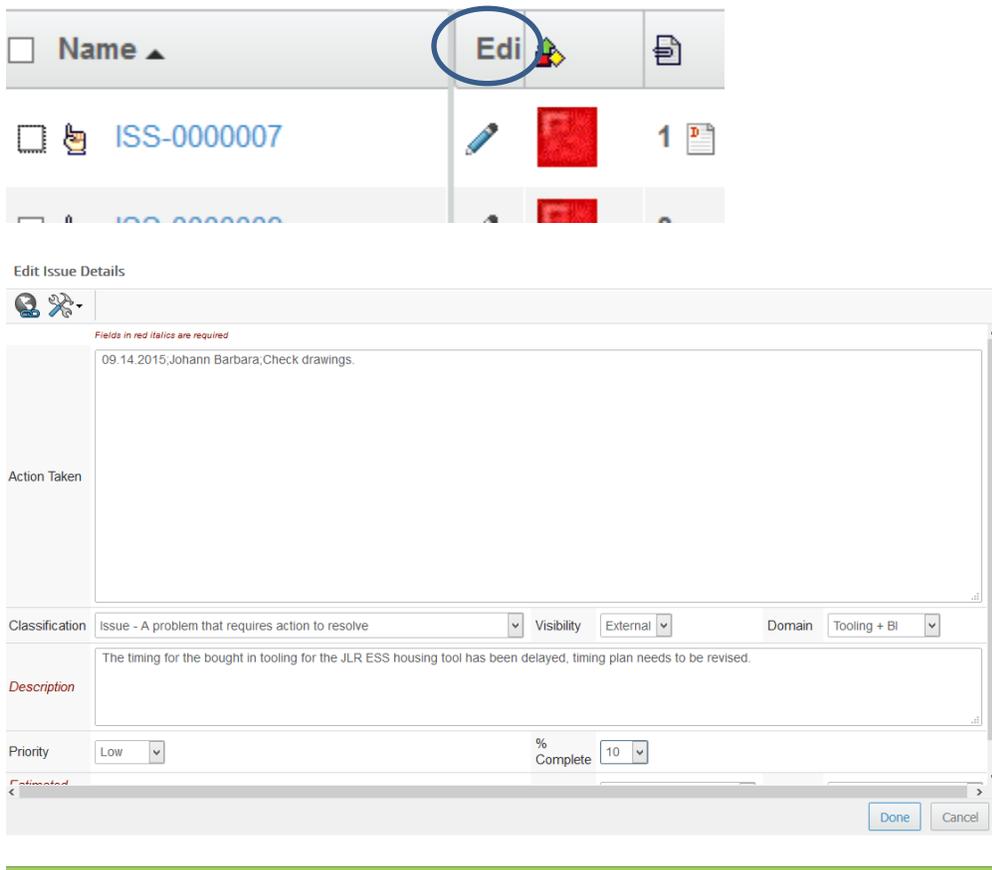
The red fields are mandatory Estimated Finish date, description and user Assignee.

A screenshot of the 'Create New' issue form. The title is 'P-0000110|Create New'. Below the title is a toolbar with a wrench icon. A note says 'Fields in red italics are required'. The form has several fields: 'Type' (Issue), 'Classification' (dropdown), 'Visibility' (External), 'Domain' (dropdown), 'Priority' (Low), 'Estimated Finish' (calendar icon, circled in red), 'Description' (text area, circled in red), 'Assignee' (dropdown menu with options: Leader, Demo; Borg, Kevin; Brand Manager, Demo; Everything, Test, circled in red), and 'Approver' (dropdown). At the bottom right are 'Done' and 'Cancel' buttons.

| | | | |
|---------|----------|-------|------------------|
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4.3 Project Lead view

The Issue table contains two columns with edit functionality: the former is to manage all information, like Action Taken provided by issue assignees



The Second Edit icon is to manage additional issue assignee: the Primary user (defined by the Project Lead) can't be removed



| | | | |
|---------|----------|-------|------------------|
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ISS-0000074: Assignee



| <input type="checkbox"/> | Name ▲ | User Name | Company | Email | Primary User |
|--------------------------|----------------------------|------------|---------------------|---------------------------------------|--------------|
| <input type="checkbox"/> | Allen Carl Bonnici Test | allen | METHODE ELECTRONICS | AllenCarl.Bonnici@methode- eur.com | Primary |
| <input type="checkbox"/> | Eugenio Vella | Gino.vella | METHODE ELECTRONICS | Eugenio.Vella@methode- eur.com | - |
| <input type="checkbox"/> | Evan Stringos | evans | METHODE ELECTRONICS | Evan.Stringos@methode- eur.com | - |

| | | | |
|---------|----------|-------|------------------|
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4.4 Project User view

Issue table contains a column with edit functionality, other than icon to upload documents or link to issue information

| Name | Edi | Reported Against | Classification | Description | Visibility | Domain |
|-------------|-----|----------------------|--------------------|-------------|------------|--------|
| ISS-0000105 | | Phase 1 (Project ... | Issue - A probl... | test design | External | Design |

The Issue assignee can update field Action Taken and %Complete

Edit Issue Details

Fields in red italics are required

% Complete:

Action Taken:

Issue Details

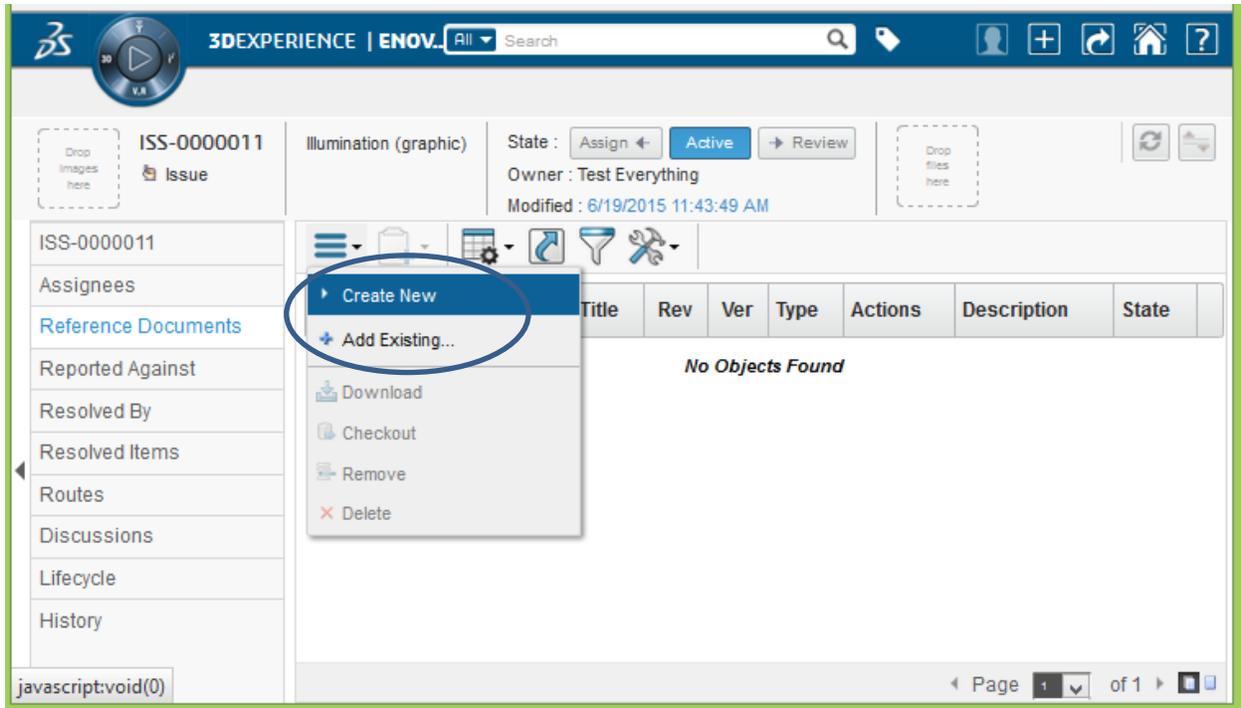
| | | | | | |
|----------------|---|------------------|--------------|----------|------------------|
| Action Taken | | | | | |
| Classification | Issue - A problem that requires action to resolve | Visibility | External | Domain | Design |
| Description | test design | | | | |
| Priority | Low | Estimated Finish | Sep 24, 2015 | Approver | Galea, Alexander |

An Issue assignee can upload documents to the Issues using Deliverable icons:

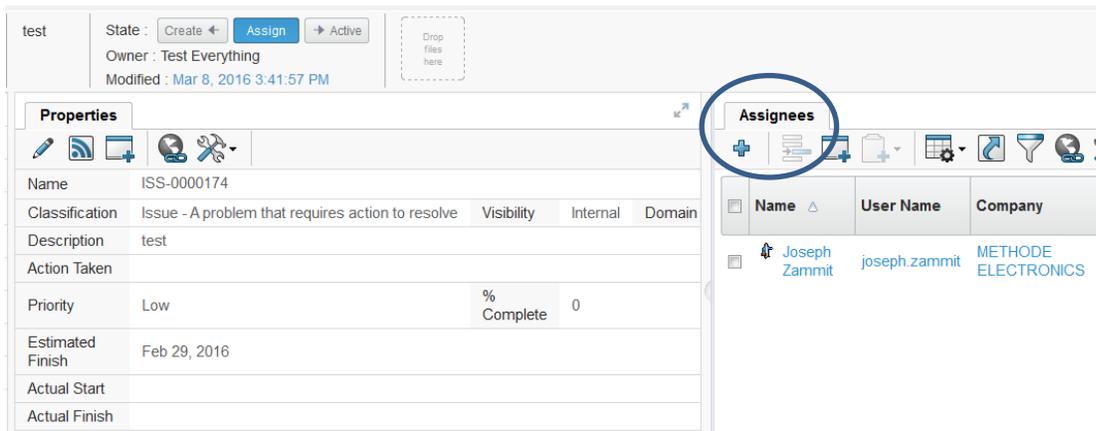
- Click on icon
- Upload document using drag & drop or commands
- Table is updated

| Name | Edi | Reported Against | Classification | Description | Visibility | Domain |
|-------------|-----|----------------------|--------------------|-------------|------------|--------|
| ISS-0000105 | | Phase 1 (Project ... | Issue - A probl... | test design | External | Design |

| | | | |
|---------|----------|-------|------------------|
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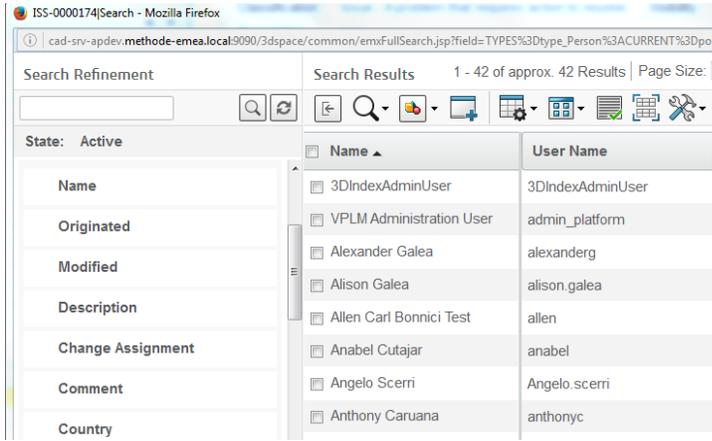


The user can add other assignee to the issue using the plus icon in the Assignee panel

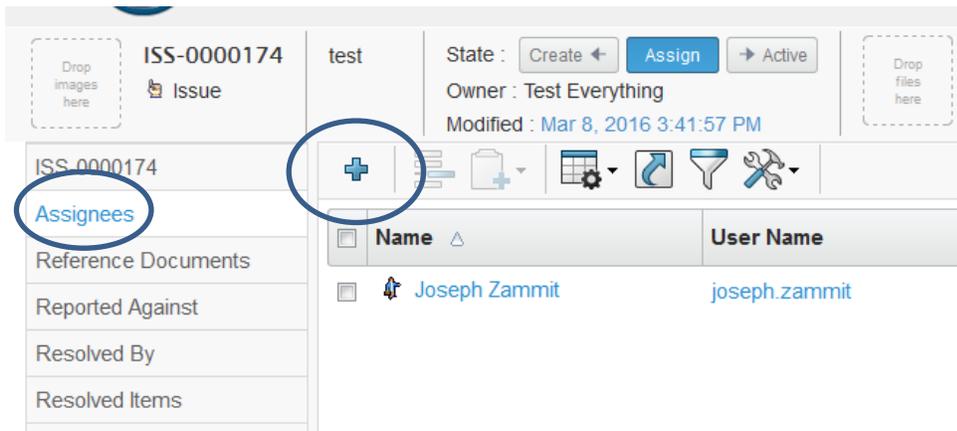


That opens a search window

| | | | |
|---------|----------|-------|------------------|
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| Status | Released | | 94 |



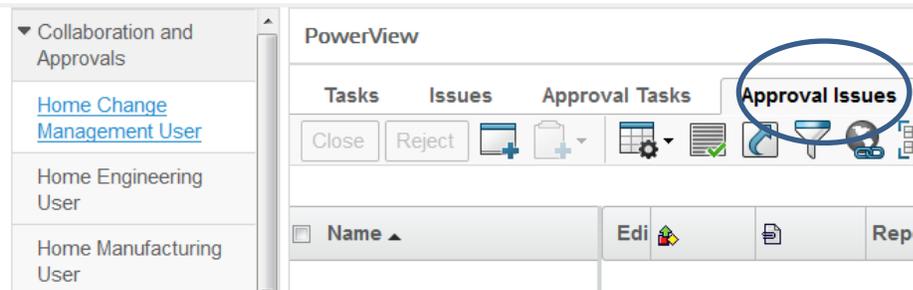
Or using the Edit plus icon in the Assignee panel



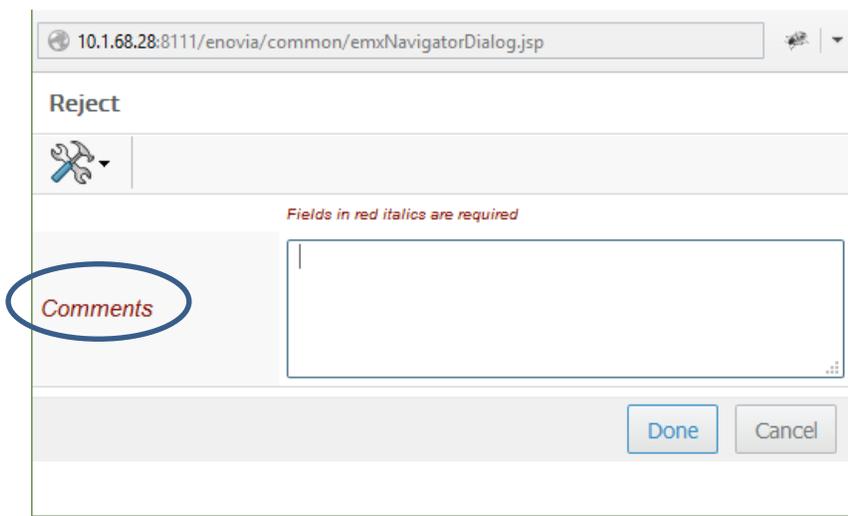
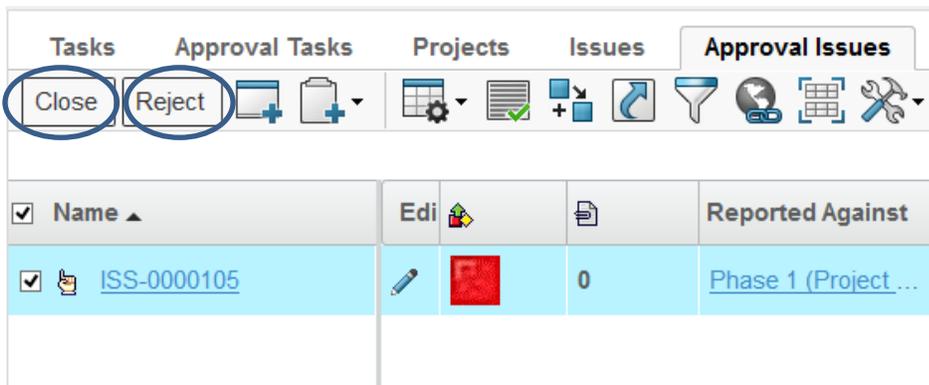
| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 95 |

4.5 Approval process

When an Issue assignee sets %Complete to 100%, if Issue was created with an Approver, the Issue is moved to the Review state, otherwise the Issue is closed.



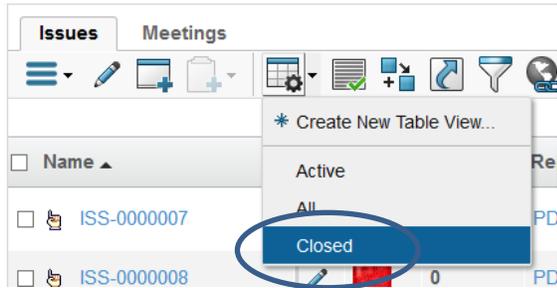
The Approver can close or reject the issue; in case of reject, a comment is mandatory.



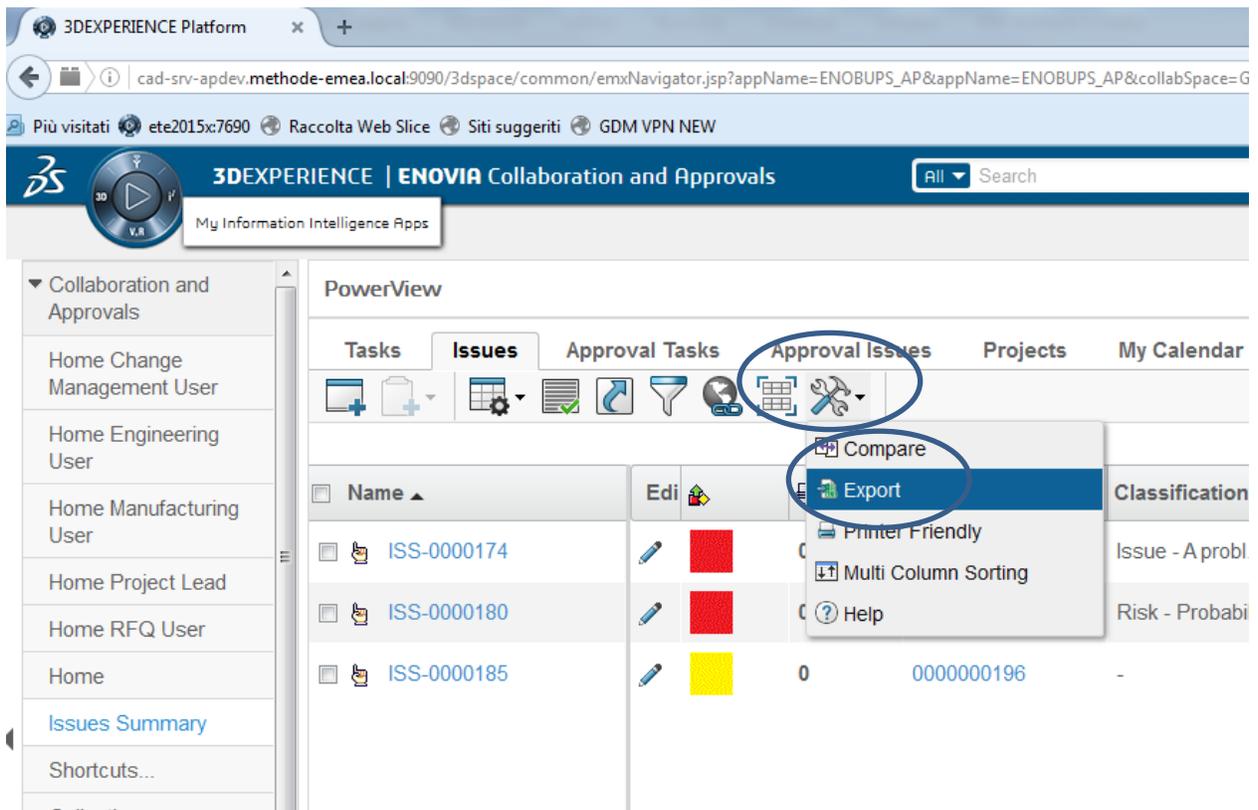
| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 96 |

4.6 Issues lists: filters

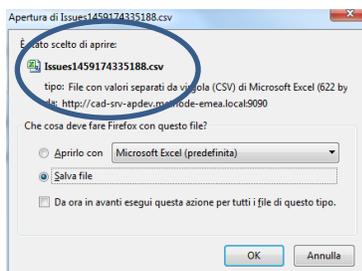
Issues table shows issues not closed; to see closed issues, select the filter «Closed»



The Project Lead can export the Issue report in an Excel format file using the Export function

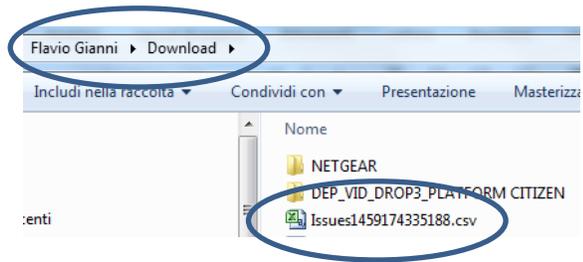


A window asks to open or save the file



The file is generated in the Download folder

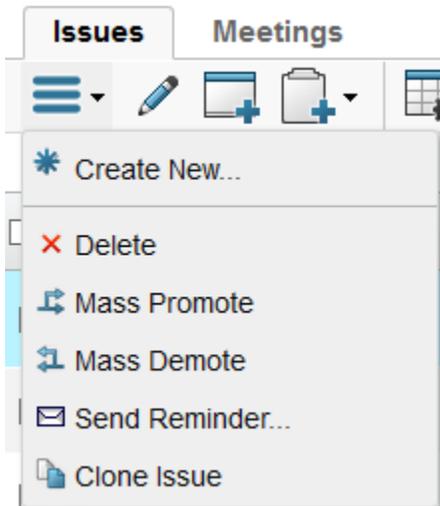
| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 97 |



| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 98 |

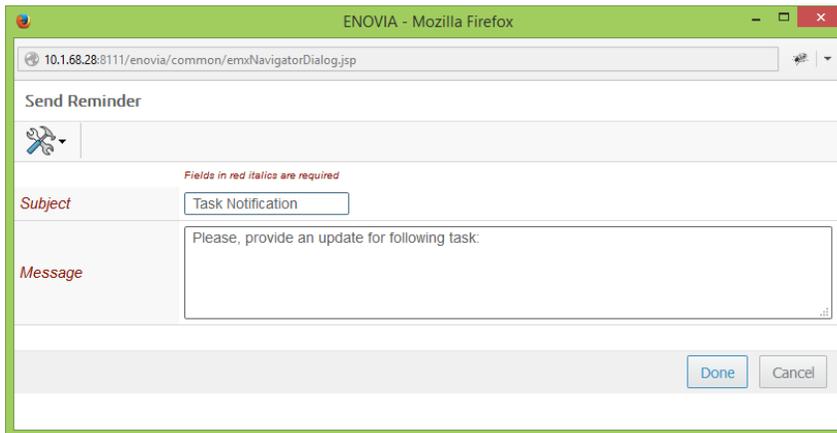
4.7 Other Functionalities

The action menu contains the commands to create a new issue, delete an issue in create state, close issues and re-active issues (issues that the assignees promote to state review and after Project Lead decides to send back to user), send a reminder to issue assignee, cloning an issue in order to create a new one.



4.7.1 Send Reminder

The Project Lead can select one or more Issues in order to send a reminder to Issue assignees.



| | | | |
|---------|----------|-------|------------------|
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| Status | Released | | 99 |

4.7.2 Clone Issue

- The Project Lead can select one or more Issue in order to create new Issues copying information from the previous.

Estimated Finish date, Action Taken, %Complete and users are not copied.

The screenshot shows a web browser window titled "ENOVIA - Mozilla Firefox" with the URL "10.1.68.28:8111/enovia/common/emwNavigatorDialog.jsp". The main content area is titled "Edit Issue Details" and contains several form fields:

- Action Taken:** A large empty text area.
- Classification:** A dropdown menu set to "Issue - A problem that requires action to resolve".
- Visibility:** A dropdown menu set to "External".
- Domain:** A dropdown menu set to "Design".
- Description:** A text area containing "Customer drawings".
- Priority:** A dropdown menu set to "Low".
- % Complete:** A dropdown menu set to "0".
- Estimated Finish:** An empty text field with a calendar icon.
- Assignee:** An empty dropdown menu.
- Approver:** An empty text field.

At the bottom right of the form, there are two buttons: "Done" and "Cancel".

| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 100 |

4.8 Tasks Issues

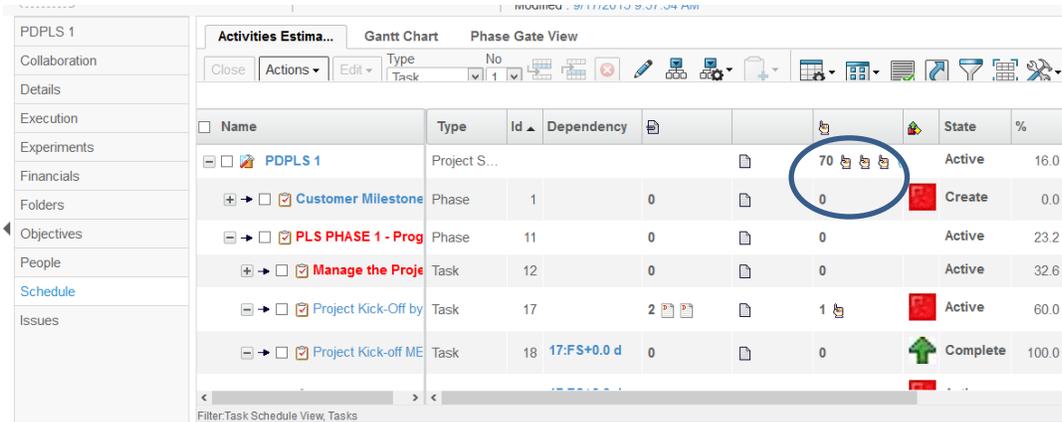
Task assignees can create issues related to tasks:

Using the  icon in the Tasks assigned table

| Tasks Filter: Assigned Tasks | | | | | | | |
|---|---|---|---|---|--------|----------------------------------|--|
| <input type="checkbox"/> Name |  Slip Days |  0 |  0 |  0 | State | % Complete | Project |
| <input type="checkbox"/> Project Kick-Off by custom | 0 | 0 | 0 | 0 | Active | <div style="width: 100%;"></div> |  |
| <input type="checkbox"/> Kick-off meeting at custom | 0 | 0 | 0 | 0 | Active | <div style="width: 100%;"></div> |  |
| <input type="checkbox"/> Project Kick-off MEM - PRF | 0 | 0 | 0 | 0 | Assign | <div style="width: 0%;"></div> |  |
| <input type="checkbox"/> Methode recieves all desig | 0 | 0 | 0 | 0 | Assign | <div style="width: 0%;"></div> |  |
| <input type="checkbox"/> Design Freeze | 0 | 0 | 0 | 0 | Assign | <div style="width: 0%;"></div> |  |
| <input type="checkbox"/> PLS Gate 1 - Review and S | 0 | 0 | 0 | 0 | Review | <div style="width: 0%;"></div> |  |

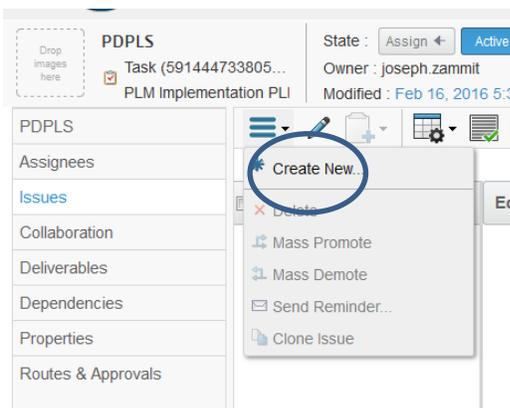
| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 101 |

Using the same  icon in the Project Schedule table

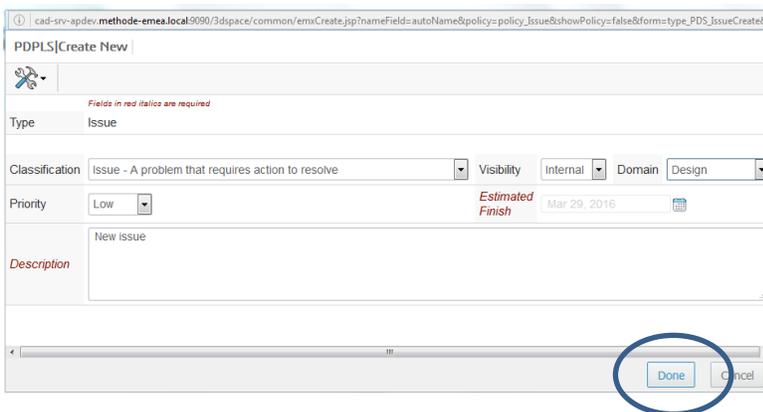


| Name | Type | Id | Dependency | | | State | % |
|---------------------|--------------|----|-------------|--|----|----------|-------|
| PDPLS 1 | Project S... | | | | 70 | Active | 16.0 |
| Customer Milestone | Phase | 1 | 0 | | 0 | Create | 0.0 |
| PLS PHASE 1 - Prog | Phase | 11 | 0 | | 0 | Active | 23.2 |
| Manage the Proje | Task | 12 | 0 | | 0 | Active | 32.6 |
| Project Kick-Off by | Task | 17 | 2 | | 1 | Active | 60.0 |
| Project Kick-off ME | Task | 18 | 17:FS+0.0 d | | 0 | Complete | 100.0 |

The user can select the link in the cell corresponding to the task he wants to create an issue. A new window is opened; from the actions menu the user selects the Create New command



The user sets up the fields and then clicks done



PDPLS[Create New]

Type: Issue

Classification: Issue - A problem that requires action to resolve | Visibility: Internal | Domain: Design

Priority: Low | Estimated Finish: Mar 29, 2016

Description: New issue

Buttons: Done (circled), Cancel

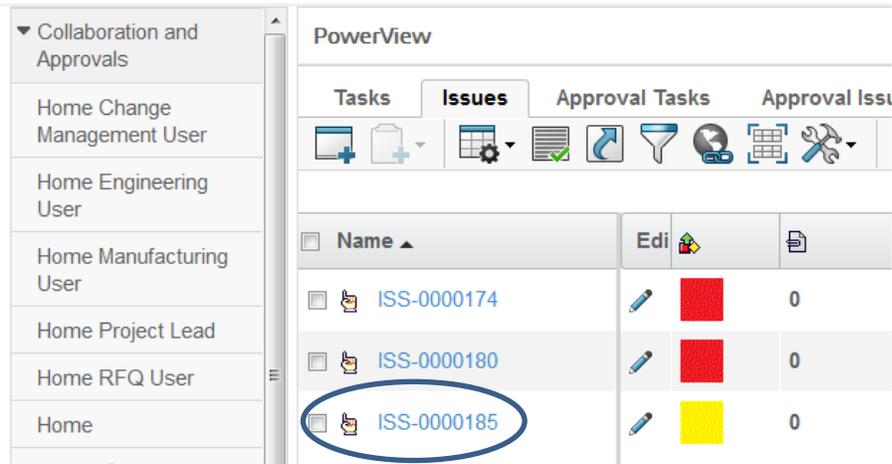
| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 102 |

| PDPLS | | | | | |
|--------------------|-----|------------------|--------------------|--|--|
| Assignees | | | | | |
| Issues | | | | | |
| Collaboration | | | | | |
| Deliverables | | | | | |
| Dependencies | | | | | |
| Properties | | | | | |
| Routes & Approvals | | | | | |
| Name | Edi | Reported Against | Classification | | |
| ISS-0000186 | 0 | PDPLS | Issue - A probl... | | |

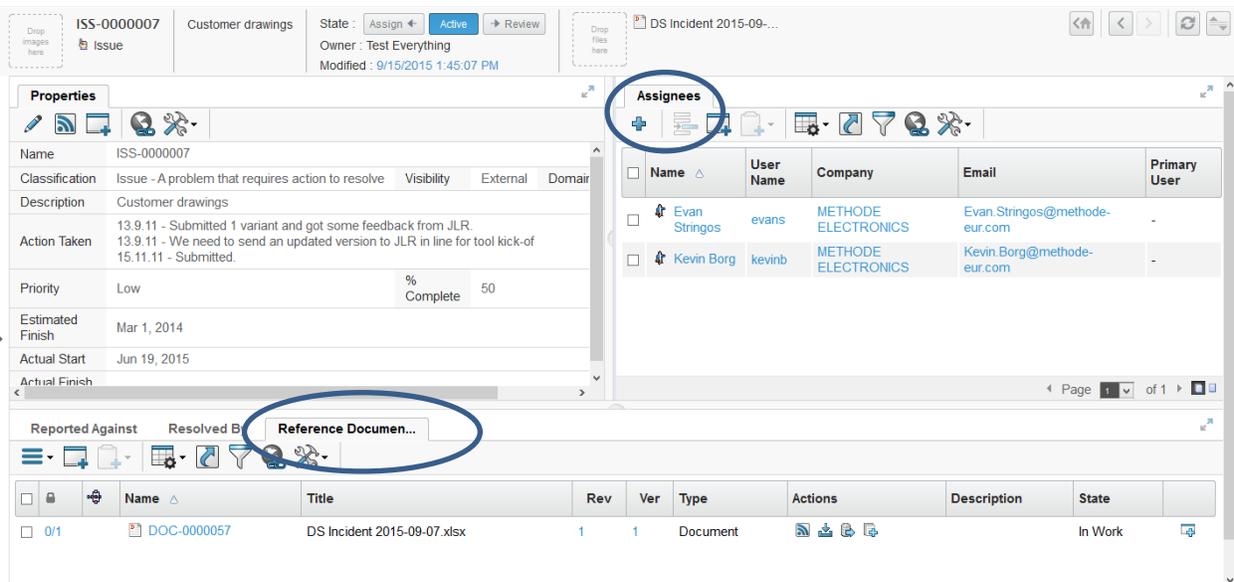
| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 103 |

4.9 Issue details

Clicking on the issue name from the Issue tab, the detail window opens.



The Issue view aggregates in one page and provides access to related items such as assignees, reference documents, reported against items, and resolved by items.

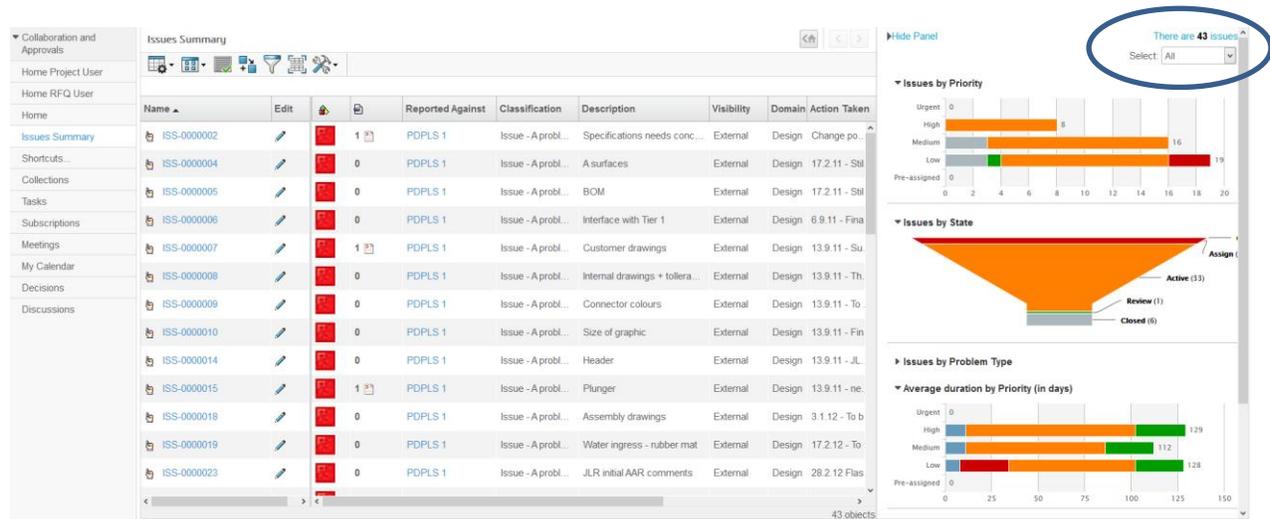


| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 104 |

4.10 Issues Summary

The Issue Summary shows all the Issues assigned to the users, also closed issues.

The user can filter issue list by Priority, State and Problem Type (currently not used)



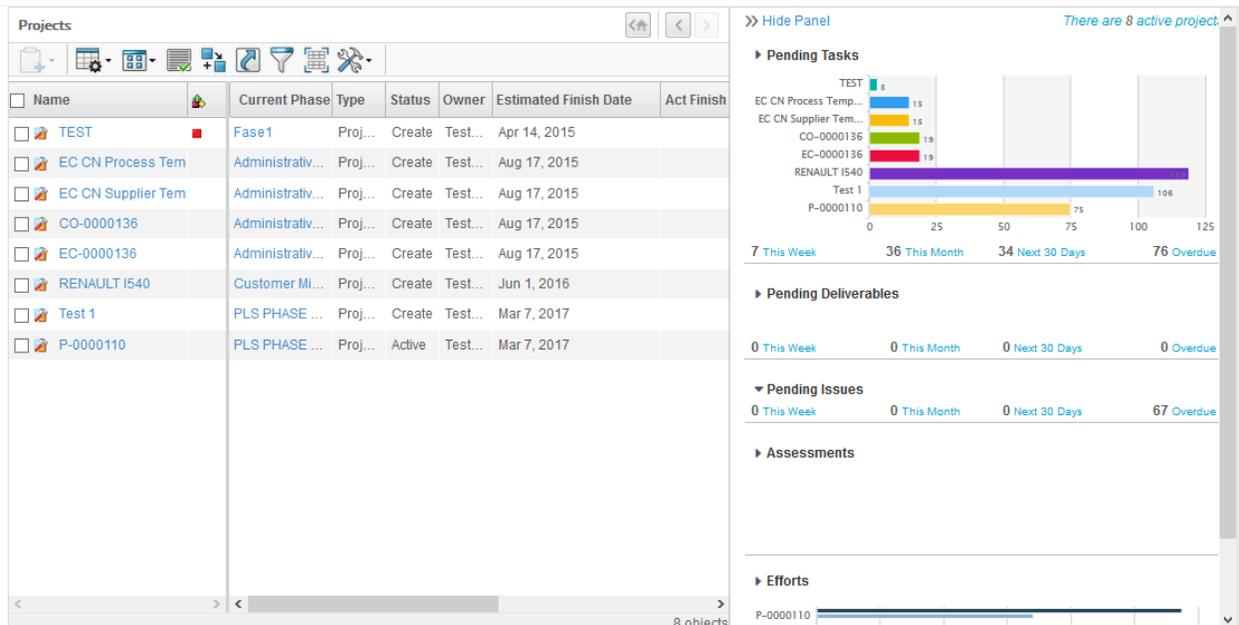
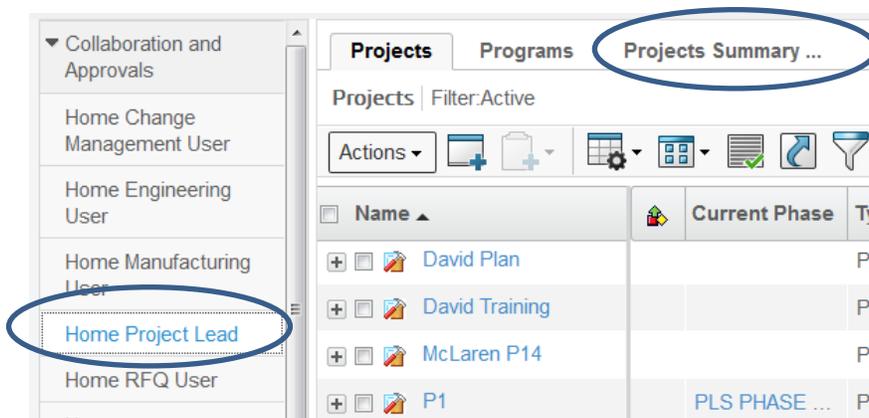
| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 105 |

PM05 Project Dashboards

| | | | |
|---------------------|--|---------------|--------|
| Purpose | Define and manage project template | Status | Define |
| Stakeholders | Project Administrator | | |
| Beginning | | | |
| Interactions | Project Administrator can create and update project template, used to create project with a standard structure | | |
| End | | | |
| Constraints | | | |

5.1 Projects Summary report

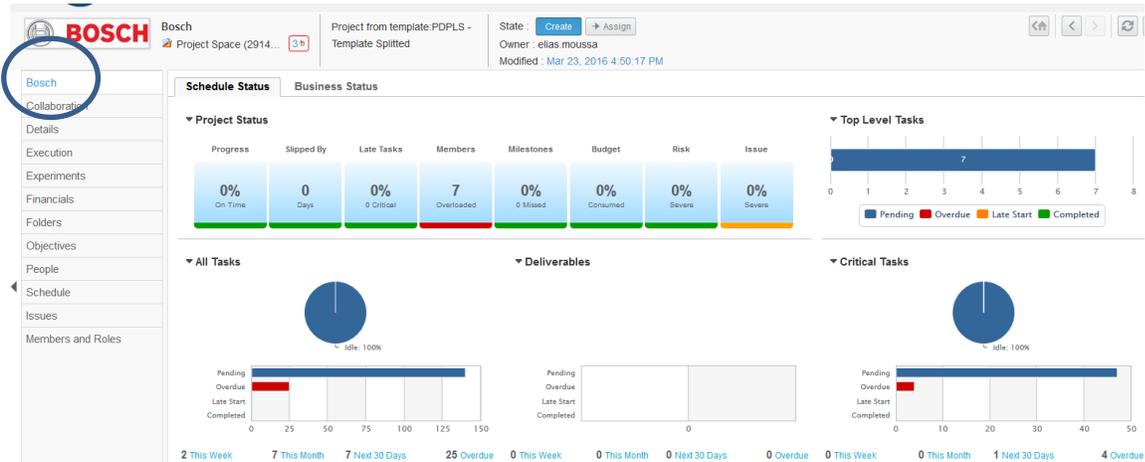
The Projects Summary report shows all the projects owned by the user and all the projects where the user is a Project Lead



| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 106 |

5.2 Project dashboard

This report shows all the information about the selected project



5.3 Project and tasks dashboard

The Schedule command shows all the information about the task of the project

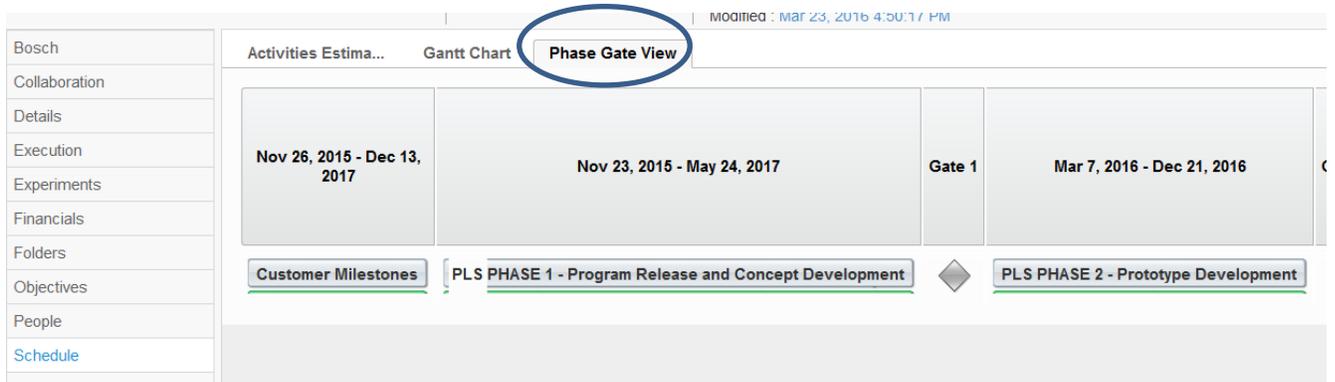
Activities Estima... Gantt Chart Phase Gate View

| Name | Type | Id | Dependency | State |
|--|--------------|-----|------------|--------|
| Bosch | Project S... | | | Create |
| Customer Milestones | Phase | 1 | 0 | Create |
| PLS PHASE 1 - Program Release and Concept Deve | Phase | 11 | 0 | Create |
| PLS PHASE 2 - Prototype Development | Phase | 67 | 0 | Create |
| PLS PHASE 3 - Production Development | Phase | 98 | 0 | Create |
| PLS PHASE 4 - Production Launch | Phase | 140 | 0 | Create |
| PLS PHASE 5 - Release to production | Phase | 162 | 0 | Create |
| Sample deliveries | Phase | 168 | 0 | Create |

| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 107 |

5.4 Phases and Gates dashboard

The tab Phase Gate View shows the information about the phases and gates of the project



| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 108 |

PM06 Calendars and Locations definition

| | | | |
|---------------------|--|---------------|--------|
| Purpose | Define and manage project template | Status | Define |
| Stakeholders | Project Administrator | | |
| Beginning | | | |
| Interactions | Project Administrator can create and update project template, used to create project with a standard structure | | |
| End | | | |
| Constraints | | | |

Calendars define the non-working days for one or more locations within an organization.

Non-working days are taken into consideration when scheduling projects

| Location Malta | | | | | | |
|--------------------------------------|----------------|--------------|--------------|------------|-------------|--|
| Events | | | | | | |
| Locations | | | | | | |
| Title | Frequency | Start Date | End Date | Day Number | Notes | |
| <input type="checkbox"/> Sunday | Weekly | | | Sunday | Sunday | |
| <input type="checkbox"/> Saint Steve | Non-Recurrence | Dec 26, 2015 | Dec 26, 2015 | | Saint Steve | |
| <input type="checkbox"/> Noel | Non-Recurrence | Dec 25, 2015 | Dec 25, 2015 | | Noel | |

Create New Event



Title

Frequency Non-Recurrence

Start Date Non-Recurrence

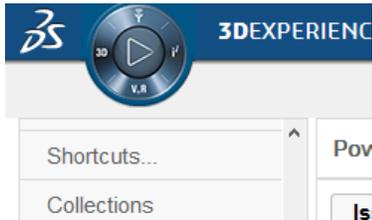
End Date Weekly

Note

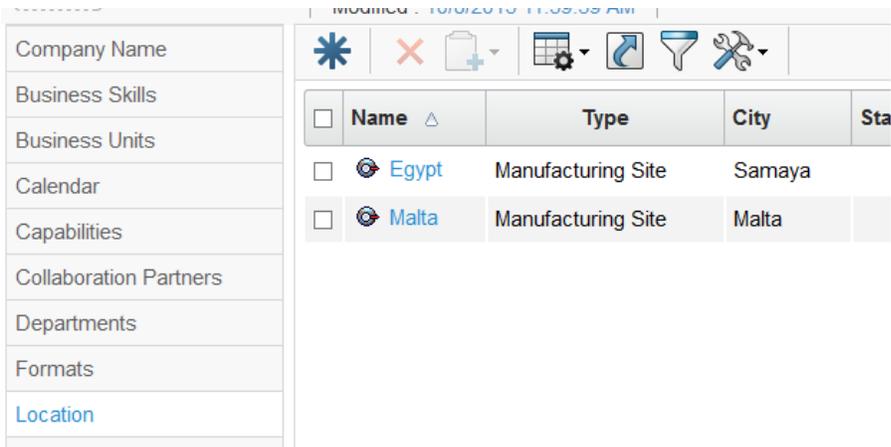
Only PLM Administrator can define location, user and calendar

Select command View My Company

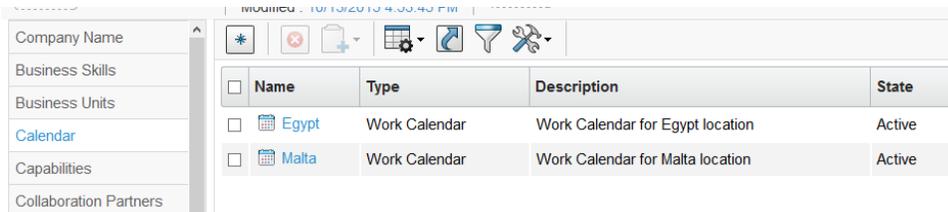
| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 109 |



Select command Location, define location as Manufacturing Site, Headquarters Site, ...



Select command Calendar, define calendar for sites



Select command People, select a user, define the user location.

| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 110 |

| <input type="checkbox"/> Name ▲ | Employee | Email | State | License Type | Organizational F |
|---|----------|--------------|--------|--------------|-------------------|
| <input type="checkbox"/> 3DIndexAdminUser | Yes | | Active | Full | |
| <input type="checkbox"/> admin_platform | Yes | Unknown | Active | Full | |
| <input type="checkbox"/> DemoBrandManager | Yes | a@a.it | Active | Full | Project User, Bas |
| <input type="checkbox"/> DemoLeader | Yes | a@a.it | Active | Full | Project User, Bas |
| <input type="checkbox"/> kevinb | Yes | Kevin.Bor... | Active | Full | Basic User, Emp |
| <input type="checkbox"/> Test Everything | Yes | warren@... | Active | Full | Specification Mar |

Edit My Profile

State:

First Name:

Middle Name:

Last Name:

Company:

Business Unit:

Location:

Company Representative:

| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 111 |

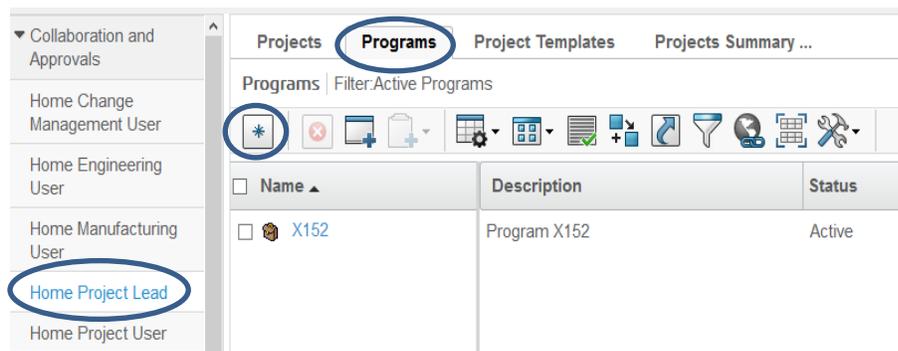
PM07 Programs definition

| | | | |
|---------------------|--|---------------|--------|
| Purpose | Define and manage project template | Status | Define |
| Stakeholders | Project Administrator | | |
| Beginning | | | |
| Interactions | Project Administrator can create and update project template, used to create project with a standard structure | | |
| End | | | |
| Constraints | | | |

A Program is a collection of projects of a similar nature or that have a common objective

7.1 Program Creation

From the Home Project Lead select the Programs Tab, that lists all the programs, then select the Add icon  in the toolbar.

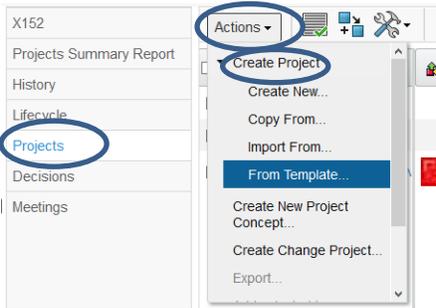


This opens the creation form. Fill the name and description then press done.

7.1.1 Project creation from Program

A program is a set of projects so it's possible to add a project directly from a program. From the projects command, that lists the projects connected to the program, select that Actions menu and then the Create Project. There are several options to create a new project

| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 112 |



For example the Project Lead can select the option From Template, that opens the creation form, that allows the user to choose the template other than some mandatory fields.

 A screenshot of a 'Create new project from template' form. The form has several sections: 'Project Template' (with a dropdown and 'Clear' button), 'Questions' (with 'No question to respond' checkbox and 'Predict Schedule' button), 'Name' (with 'AutoName' checkbox), 'Type' (dropdown), 'Project Date' (calendar icon), 'Description' (text area), 'Copy Options' (checkboxes for 'Financial Data' and 'Folders', and a 'Resource Template' dropdown), 'Project Scheduling' (dropdowns for 'Schedule From' and 'Default Constraint'), 'Related Info' (dropdowns for 'Business Unit', 'Base Currency', 'Program', 'Project Visibility', 'Business Goal', and 'Policy'). At the bottom are 'Done' and 'Cancel' buttons. The 'Project Template' field is circled in blue.

After the creation , the Project Lead can define the details of the Program.

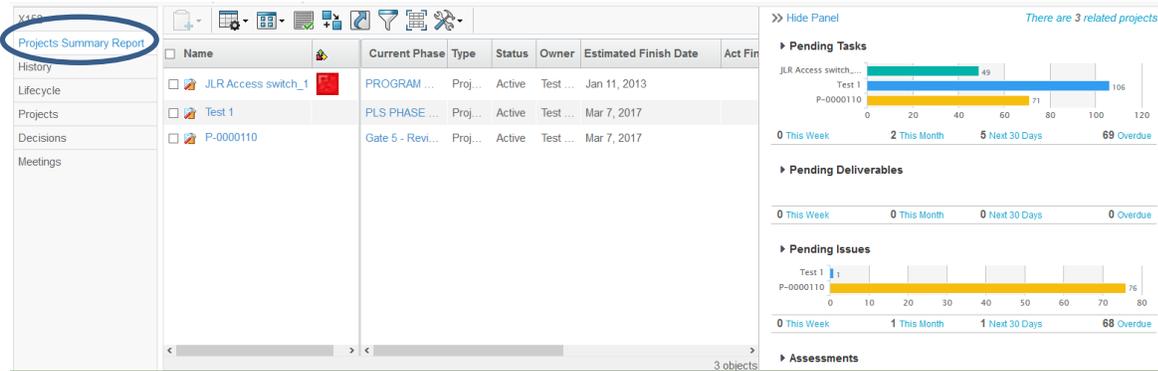
 A screenshot of the 'Properties' tab for a project named 'Test 1'. The sidebar on the left has 'Details' circled in blue. The main area shows various fields: 'Type' (Project Space), 'Name' (Test 1), 'Policy' (Project Space), 'Project Owner' (Test Everything), 'Description' (Test1 PDPLS - Template), 'Project Status' (Active), 'Visibility' (Members), 'Creation Date' (Jun 1, 2015), 'Company Name' (Company Name), 'Business Unit' (with 'Clear' button), and 'Program' (X152 with 'Clear' button).

| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 113 |

7.2 Programs Dashboard

The Projects Summary Report shows some charts about project information:

- Pending Tasks: any tasks not in the complete state
- Pending Deliverables: deliverables of tasks and phases that are not in the complete state
- Pending Issues: any issues not in closed state



| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 114 |

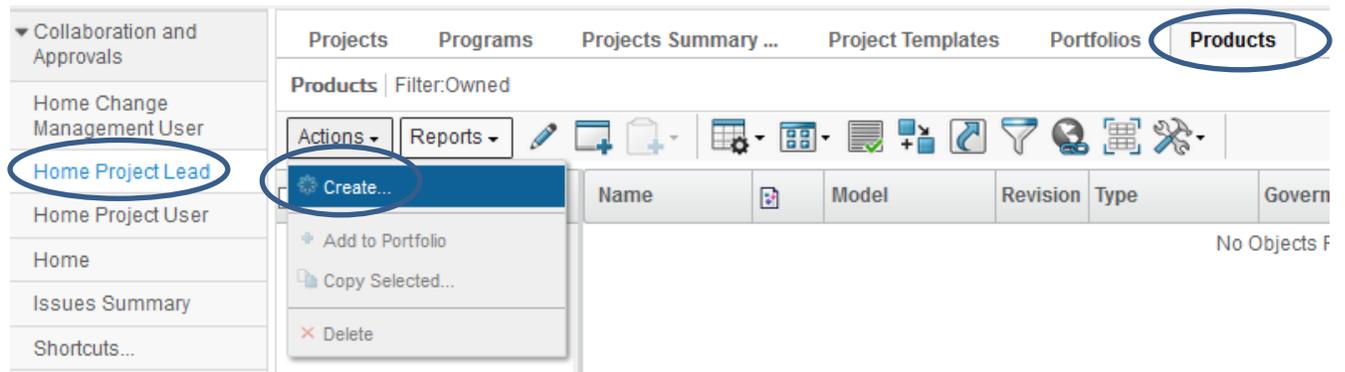
PM08 Product definition

| | | | |
|---------------------|--|---------------|--------|
| Purpose | Define and manage project template | Status | Define |
| Stakeholders | Project Administrator | | |
| Beginning | | | |
| Interactions | Project Administrator can create and update project template, used to create project with a standard structure | | |
| End | | | |
| Constraints | | | |

After RFQ process, when PRF is approved, from the Products tab in the Home Project Lead, the Project Lead creates new products or modifies existing products adding new variants. The Project Lead defines the governing project and selects the Core Team members.

8.1 Product creation

The Project Lead selects the command Create from the Actions menu



| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 115 |

The Project Lead enters the product name (an auto naming function is provided; usually, use the Customer Part Number if existing), description and Marketing Text; Marketing Name is populated automatically by system using the value of the field Name.

Create New Product

Fields in red italics are required

Name
 AutoName

Type
 ...

Rev

Description

Company
 ...

Owner
 ...

Design Responsibility
 ...

Marketing Name

Marketing Text

Policy

The table shows only the product belonging to the user connected; a filter is available in order to see all the products

| Marketing Name | Name | Description | Revision | Type |
|-------------------|--------------|-------------|----------|--------------|
| 12345Customer2 | 12345Cus... | | | Hardware ... |
| 155T-A1734-AA | 155T-A173... | | | Hardware ... |
| BRAKE DUAL CCT | HP-0000006 | HP-0000006 | A | Hardware ... |
| C12345 | C12345 | C12345 | A | Hardware ... |
| CST | HP-0000010 | HP-0000010 | A | Hardware ... |
| Engine Start Stop | HP-0000004 | HP-0000004 | A | Hardware ... |
| Glove Box SW | HP-0000001 | HP-0000001 | A | Hardware ... |

| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 116 |

Clicking on the product name, the form with the product details opens.

Drop images here

C12345
C12345
Hardware Product (A)

Switch for new product

State : Preliminary → Product Management

Owner : joseph.zammit

Modified : 1/7/2016 3:19:39 PM

Properties Images Lifecycle Routes History Variants Projects

Actions

Basics

Name C12345

Revision A

Type Hardware Product

Owner Joseph Zammit

Policy Product

Derivation Details

| | | | | |
|------------------------|----------|-----------------------|------|------------|
| Derivation Type | Revision | Derived From | Root | Derivation |
| Higher Revision Exists | No | New Derivation Exists | No | |

State

| | | | |
|-------|-------------|----------------------------------|----|
| State | Preliminary | Active Engineering Change Exists | No |
|-------|-------------|----------------------------------|----|

Additional Information

| | | | |
|-----------------------|---------------------|-------------------|--------------------------------|
| Product Line | C12345 | Company | METHODE ELECTRONICS |
| Model | C12345 | Model Prefix | |
| Design Responsibility | METHODE ELECTRONICS | Governing Project | |
| Marketing Name | C12345 | Marketing Text | C12345: Switch for new product |

The toolbar contains some commands to define variants and governing the project (other than the commands to upload images, view history, etc.)

Properties Images Lifecycle Routes History Variants Projects

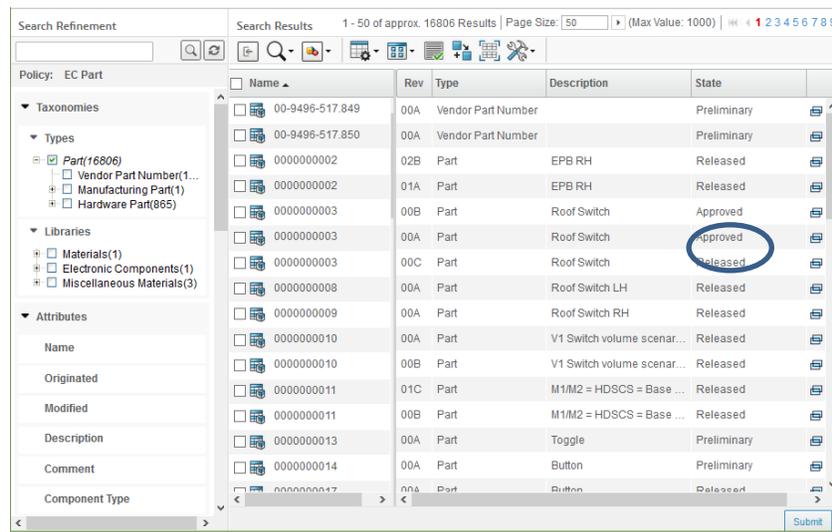
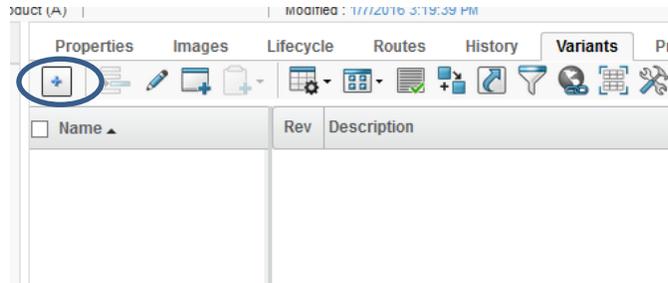
Actions

- Collaborate with Physical...
- Edit Details
- Add to Portfolio...
- Copy...
- Subscribe...

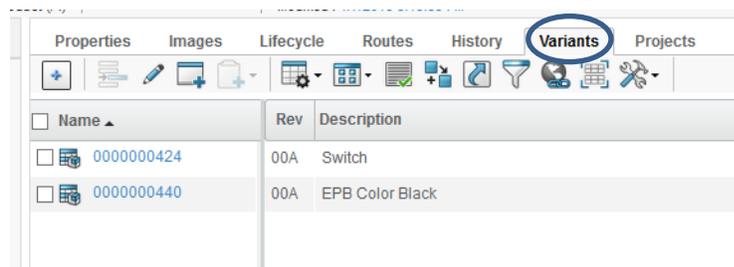
| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 117 |

8.2 Variants

The Command Variants opens the table of the variants of the product, the toolbar contains the command to add new variants created during a RFQ process. The Project Lead selects the icon  to search for variants to add.



After the part selection, the variant table is updated

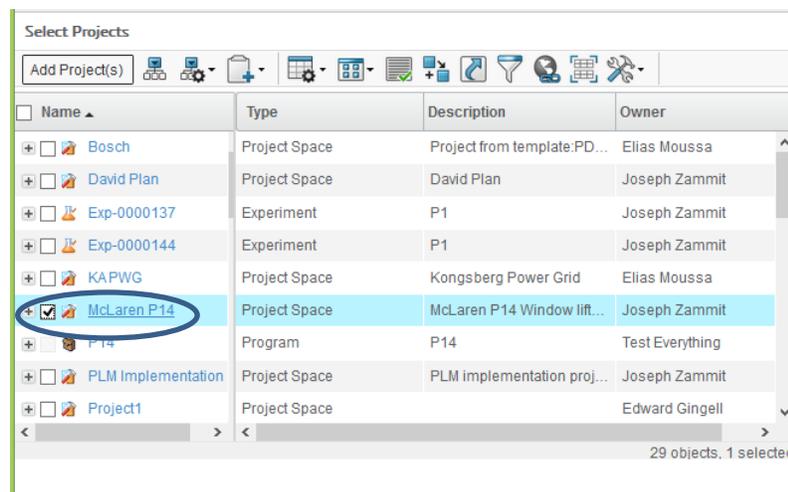
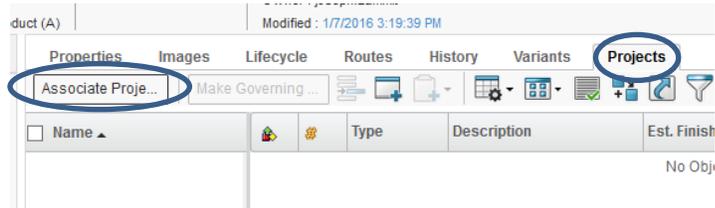


| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 118 |

8.3 Projects

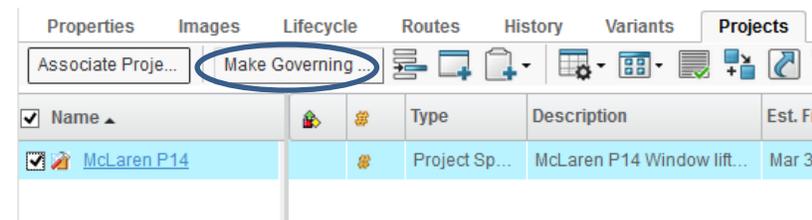
The Command **Projects** opens the table of the projects connected to the product; more than one project can be connected to a product but only one can be set as main.

Project Lead creates a new project for a new product or uses an existing project. The new project has to be created previously, using the functions described. The Project Lead selects the **Associate Projects**, in order to search for existing projects.



The table shows the projects that belong to the user or where the user is a member. Project Lead can select one or more projects and press “Add Project(s)”.

In order to define the Governing Project (main project), the Project Lead selects the main project and press “Make Governing Project”. The icon  identifies the main project.



From project side, command Governing Items (contained in command Objectives) shows the products governed by the project.

| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 119 |

Drop images here

McLaren P14

Project Space (21449...)

McLaren P14 Window lifters,
DNR, central control console

State : Create

Owner : josep

Modified : 17/11/2017

McLaren P14

Collaboration

Details

Execution

Experiments

Financials

Folders

Objectives

People

Business Goals
Quality
Governed Items

| Name ▲ | Type |
|--------|------------------|
| C12345 | Hardware Product |

| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 120 |

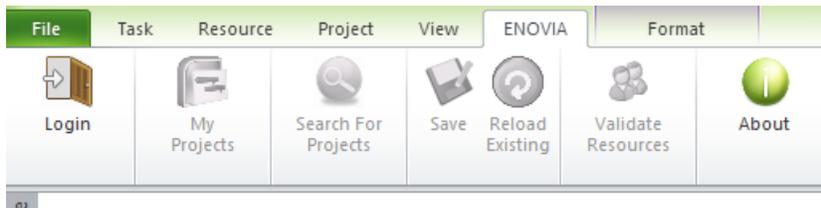
PM09 MS Project Integration

| | | | |
|---------------------|--|---------------|--------|
| Purpose | Define and manage project template | Status | Define |
| Stakeholders | Project Administrator | | |
| Beginning | | | |
| Interactions | Project Administrator can create and update project template, used to create project with a standard structure | | |
| End | | | |
| Constraints | | | |

For the current release of 3DEXPERIENCE the supported versions of Microsoft Project are 2007, 2010, and 2013.

Project and Task schedule and resource information can be modified, including:

- Project/Task Name
- Start Date/Finish Date/Duration
- Task as Mandatory/Optional
- Task owner
- Task state
- Task Percentage
- Predecessors (Task Dependency. For example, 3FS + 3 days)
- Resources (Task Assignees) and resource assignment
- Constraint type and dates for a task
- Project "schedule from" attribute for a project
- Actual Start date/Actual Finish date



Bi-directional Sync allows integration users to:

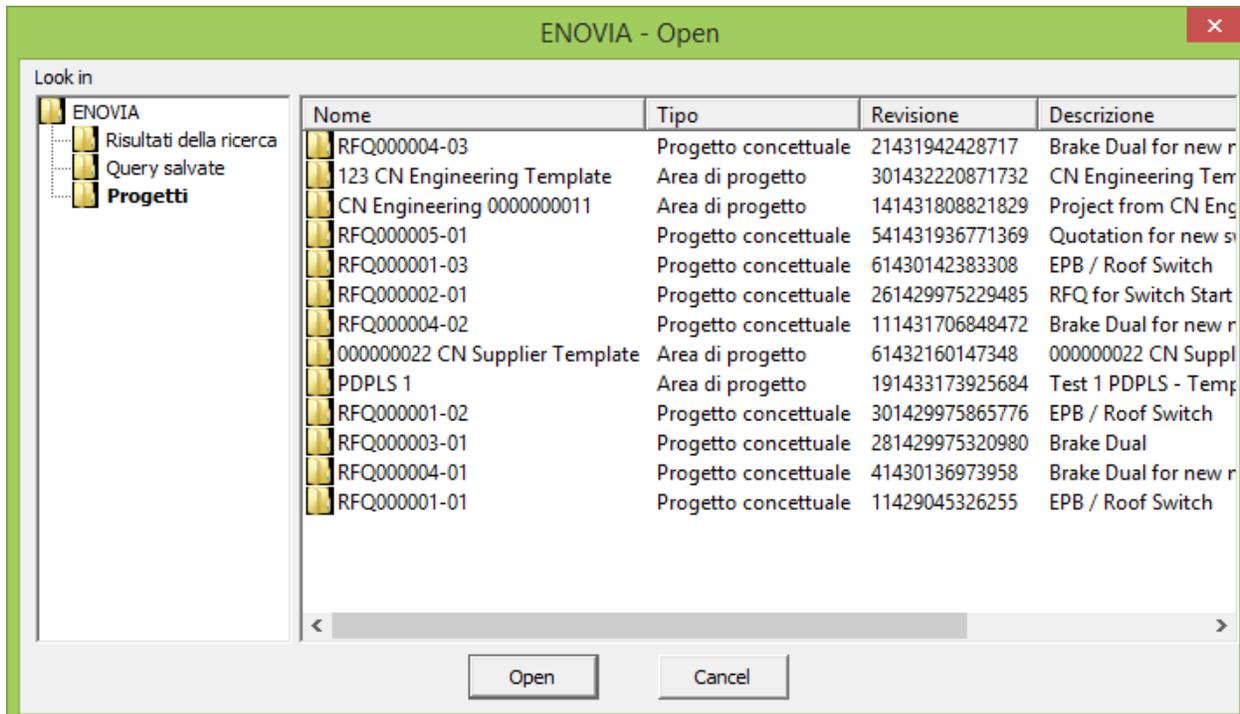
- Create a new Project Management project using Microsoft Project.
- View an existing Project Management project in Microsoft Project.
- Download an existing Project Management project to Microsoft Project, make changes to project content, and then "merge" the changes back into Project Management

| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 121 |

9.1 Searching for Project

My Projects searches for projects the user can access:

- If the user is a Project Member the project will open in "View in MS Project" mode.
- If the user is a Project Lead the project will open in "Edit in MS Project" mode



Select the project and select command Open to open a project in MS Project

| ID | Task Name | WBS | Task Type | State | % Complete | Est Duration | Est Start | Est Finish |
|----|---|-------|---------------|--------|------------|--------------|--------------|------------|
| 0 | PDPLS 1 | | Project Space | Create | 0% | 443 days | Wed 01/07/15 | Mon 13/03 |
| 1 | Customer Milestones | 1 | Phase | Create | 0% | 393 days | Wed 01/07/15 | Mon 02/09 |
| 2 | Supplier Nomination | 1.1 | Milestone | Create | 0% | 0 days | Wed 01/07/15 | Wed 01/07 |
| 3 | Design Freeze - Mechanical & Electrical | 1.2 | Milestone | Create | 0% | 0 days | Thu 13/08/15 | Thu 13/08 |
| 4 | Parts from 1st Tooling - FOT's (RDV0/VFF) | 1.3 | Milestone | Create | 0% | 0 days | Wed 23/03/16 | Wed 23/03 |
| 5 | Vehicle Check (VC/VFF) LOT B-Series | 1.4 | Milestone | Create | 0% | 0 days | Wed 06/04/16 | Wed 06/04 |
| 6 | Plant Trial (PT/PVS/BMG/C-Series) 1 | 1.5 | Milestone | Create | 0% | 0 days | Wed 04/05/16 | Wed 04/05 |
| 7 | Plant Trial (PT/0-Series/Note 3D-Series/PPAP1) 2 | 1.6 | Milestone | Create | 0% | 0 days | Wed 10/08/16 | Wed 10/08 |
| 8 | PSW (KO/Note 1/PPAP3) | 1.7 | Milestone | Create | 0% | 0 days | Mon 02/01/17 | Mon 02/01 |
| 9 | Manufacturing Approval | 1.8 | Milestone | Create | 0% | 0 days | Tue 27/09/16 | Tue 27/09 |
| 10 | Start of Agreement - SOP (Mass Production) | 1.9 | Milestone | Create | 0% | 0 days | Wed 01/07/15 | Wed 01/07 |
| 11 | PLS PHASE 1 - Program Release and Concept Development | 2 | Phase | Create | 0% | 360 days | Wed 01/07/15 | Wed 16/11 |
| 12 | Manage the Project Tasks | 2.1 | Task | Create | 0% | 360 days | Wed 01/07/15 | Wed 16/11 |
| 13 | Project Communication External | 2.1.1 | Task | Create | 0% | 300 days | Wed 01/07/15 | Wed 24/09 |
| 14 | Project Communication Internal - Core team | 2.1.2 | Task | Create | 0% | 360 days | Wed 01/07/15 | Wed 16/11 |
| 15 | Project Communication Internal - Service functions | 2.1.3 | Task | Create | 0% | 360 days | Wed 01/07/15 | Wed 16/11 |
| 16 | Project Management / Admin | 2.1.4 | Task | Create | 0% | 360 days | Wed 01/07/15 | Wed 16/11 |
| 17 | Project Kick-Off by customer - SOW and LOI available | 2.2 | Task | Create | 0% | 0 days | Wed 01/07/15 | Wed 01/07 |
| 18 | Project Kick-off MEM - PRF issued and team formed | 2.3 | Task | Create | 0% | 5 days | Wed 01/07/15 | Wed 08/07 |
| 19 | Kick-off meeting at customer | 2.4 | Task | Create | 0% | 1 day | Wed 01/07/15 | Thu 02/07 |

| | | | |
|---------|----------|-------|------------------|
| Version | 7 | Date: | 28-November-2017 |
| Status | Released | | 122 |

Search for Projects searches for projects with search criteria

Search [X]

Actions

Type: ...

Name:

Revision:

Title:

Owner:

Created After: ...

Created Before: ...

Vault:

Limit Results to:

By additional attributes with: And Or

| Field | Operator | Enter Value | Select Value |
|-------|----------|-------------|--------------|
| | | | |

ENOVIA - Open [X]

Look in

- ENOVIA
 - Risultati della ricerca**
 - Query salvate
 - Progetti

| Nome | Revisione | Tipo | Descrizione |
|--------------------------------|-----------------|------------------|----------------------------|
| 000000022 CN Supplier Template | 61432160147348 | Area di progetto | 000000022 CN Supplier T... |
| 123 CN Engineering Template | 301432220871732 | Area di progetto | CN Engineering Templati... |
| CN Engineering 0000000011 | 141431808821829 | Area di progetto | Project from CN Enginee... |
| PDPLS 1 | 191433173925684 | Area di progetto | Test 1 PDPLS - Template... |

| | | | |
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Select the project and select command Open to open a project in MS Project

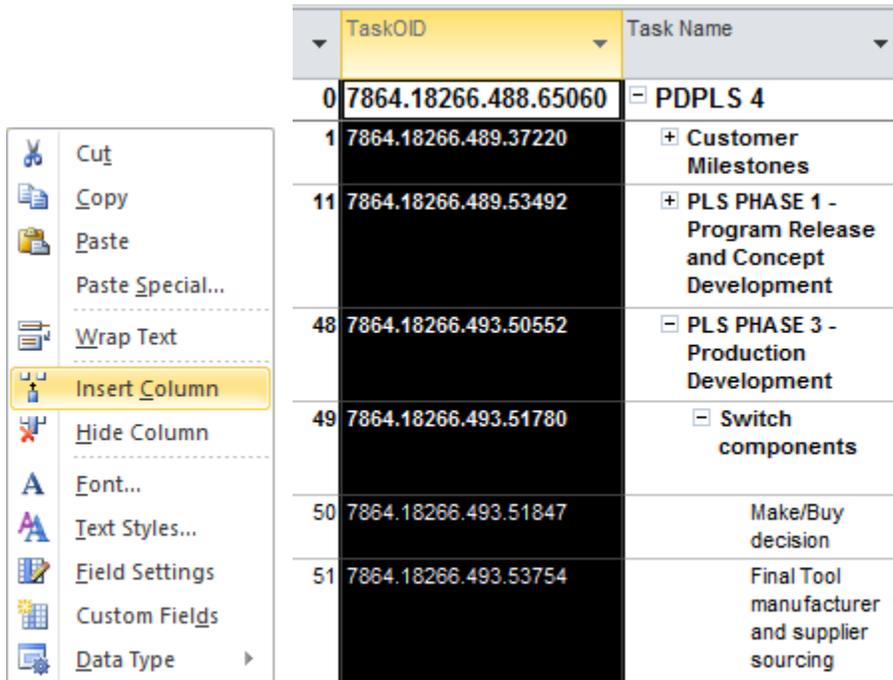
| ID | Task Name | WBS | Task Type | State | % Complete | Est Duration | Est Start | Est Finish |
|----|---|-------|---------------|--------|------------|--------------|--------------|--------------|
| 0 | PDPLS 1 | 0 | Project Space | Create | 0% | 443 days | Wed 01/07/15 | Mon 13/03/16 |
| 1 | Customer Milestones | 1 | Phase | Create | 0% | 393 days | Wed 01/07/15 | Mon 02/0/16 |
| 2 | Supplier Nomination | 1.1 | Milestone | Create | 0% | 0 days | Wed 01/07/15 | Wed 01/0/16 |
| 3 | Design Freeze - Mechanical & Electrical | 1.2 | Milestone | Create | 0% | 0 days | Thu 13/08/15 | Thu 13/0/16 |
| 4 | Parts from 1st Tooling - FOT's (RDV0/VFF) | 1.3 | Milestone | Create | 0% | 0 days | Wed 23/03/16 | Wed 23/0/16 |
| 5 | Vehicle Check (VC/VFF) LOT B-Series | 1.4 | Milestone | Create | 0% | 0 days | Wed 06/04/16 | Wed 06/0/16 |
| 6 | Plant Trial (PT/PVS/BMG/C-Series) 1 | 1.5 | Milestone | Create | 0% | 0 days | Wed 04/05/16 | Wed 04/0/16 |
| 7 | Plant Trial (PT/0-Series/Note 3/D-Series/PPAP1) 2 | 1.6 | Milestone | Create | 0% | 0 days | Wed 10/08/16 | Wed 10/0/16 |
| 8 | PSW (KO/Note 1/PPAP3) | 1.7 | Milestone | Create | 0% | 0 days | Mon 02/01/17 | Mon 02/0/17 |
| 9 | Manufacturing Approval | 1.8 | Milestone | Create | 0% | 0 days | Tue 27/09/16 | Tue 27/0/16 |
| 10 | Start of Agreement - SOP (Mass Production) | 1.9 | Milestone | Create | 0% | 0 days | Wed 01/07/15 | Wed 01/0/16 |
| 11 | PLS PHASE 1 - Program Release and Concept Development | 2 | Phase | Create | 0% | 360 days | Wed 01/07/15 | Wed 16/1/16 |
| 12 | Manage the Project Tasks | 2.1 | Task | Create | 0% | 360 days | Wed 01/07/15 | Wed 16/1/16 |
| 13 | Project Communication External | 2.1.1 | Task | Create | 0% | 300 days | Wed 01/07/15 | Wed 24/0/16 |
| 14 | Project Communication Internal - Core team | 2.1.2 | Task | Create | 0% | 360 days | Wed 01/07/15 | Wed 16/1/16 |
| 15 | Project Communication Internal - Service functions | 2.1.3 | Task | Create | 0% | 360 days | Wed 01/07/15 | Wed 16/1/16 |
| 16 | Project Management / Admin | 2.1.4 | Task | Create | 0% | 360 days | Wed 01/07/15 | Wed 16/1/16 |
| 17 | Project Kick-Off by customer - SOW and LOI available | 2.2 | Task | Create | 0% | 0 days | Wed 01/07/15 | Wed 01/0/16 |
| 18 | Project Kick-off MEM - PRF issued and team formed | 2.3 | Task | Create | 0% | 5 days | Wed 01/07/15 | Wed 08/0/15 |
| 19 | Kick-off meeting at customer | 2.4 | Task | Create | 0% | 1 day | Wed 01/07/15 | Thu 02/0/15 |

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9.2 Copy tasks in MS Project

Tasks copied have to be modified in order to remove property «TaskOID» (PLM unique ID)

If this property is not removed, MS Project integration manages the tasks copied as «moved».



| TaskOID | Task Name |
|-------------------------|---|
| 0 7864.18266.488.65060 | PDPLS 4 |
| 1 7864.18266.489.37220 | + Customer Milestones |
| 11 7864.18266.489.53492 | + PLS PHASE 1 - Program Release and Concept Development |
| 48 7864.18266.493.50552 | - PLS PHASE 3 - Production Development |
| 49 7864.18266.493.51780 | - Switch components |
| 50 7864.18266.493.51847 | Make/Buy decision |
| 51 7864.18266.493.53754 | Final Tool manufacturer and supplier sourcing |

After complete the copy, user has to empty the property «TaskOID».

MS Project integration recognizes copied tasks as new tasks

| | | | | |
|----|----|-----------------------|---|----------|
| 51 | 51 | 7864.18266.493.53754 | Final Tool manufacturer and supplier sourcing | 3.1.2 |
| 52 | 52 | 7864.18266.6816.26784 | Task 3 | 3.1.3 |
| 53 | 53 | 7864.18266.493.56423 | - Bought-in Tools | 3.1.4 |
| 54 | 54 | 7864.18266.493.60235 | Tool manufacturer kick-off | 3.1.4.1 |
| 55 | 55 | 7864.18266.493.61728 | Tool design design reviews and approval from Customer | 3.1.4.2 |
| 56 | 56 | 7864.18266.493.63243 | Tool manufacture | 3.1.4.3 |
| 57 | 57 | 7864.18266.494.1091 | PFMEA + QCP for each tool and component | 3.1.4.4 |
| 58 | 58 | 7864.18266.494.3546 | Receipt of FOT (First-off tool parts) | 3.1.4.5 |
| 59 | 59 | 7864.18266.494.4359 | STA review assessment and feedback to tool manufacturer | 3.1.4.6 |
| 60 | 60 | 7864.18266.494.6600 | Tool tuning loop 1 | 3.1.4.7 |
| 61 | 61 | 7864.18266.494.10188 | Receipt of tuned parts | 3.1.4.8 |
| 62 | 62 | 7864.18266.494.11092 | STA review assessment and feedback to tool manufacturer 1 | 3.1.4.9 |
| 63 | 63 | 7864.18266.494.14872 | Tool Tuning Loop 2 | 3.1.4.10 |
| 64 | 64 | 7864.18266.494.17722 | STA review assessment and feedback to tool manufacturer 2 | 3.1.4.11 |
| 65 | 65 | 7864.18266.494.21544 | + Bought In Components | 3.1.5 |
| 77 | 77 | | - Bought-in Tools | 3.1.6 |
| 78 | 78 | | Tool manufacturer kick-off | 3.1.4.1 |
| 79 | 79 | | Tool design design reviews and approval from Customer | 3.1.6.2 |
| 80 | 80 | | Tool manufacture | 3.1.6.3 |
| 81 | 81 | | PFMEA + QCP for each tool and component | 3.1.6.4 |
| 82 | 82 | | Receipt of FOT (First-off tool parts) | 3.1.6.5 |
| 83 | 83 | | STA review assessment and feedback to tool manufacturer | 3.1.6.6 |
| 84 | 84 | | Tool tuning loop 1 | 3.1.6.7 |
| 85 | 85 | | Receipt of tuned parts | 3.1.6.8 |

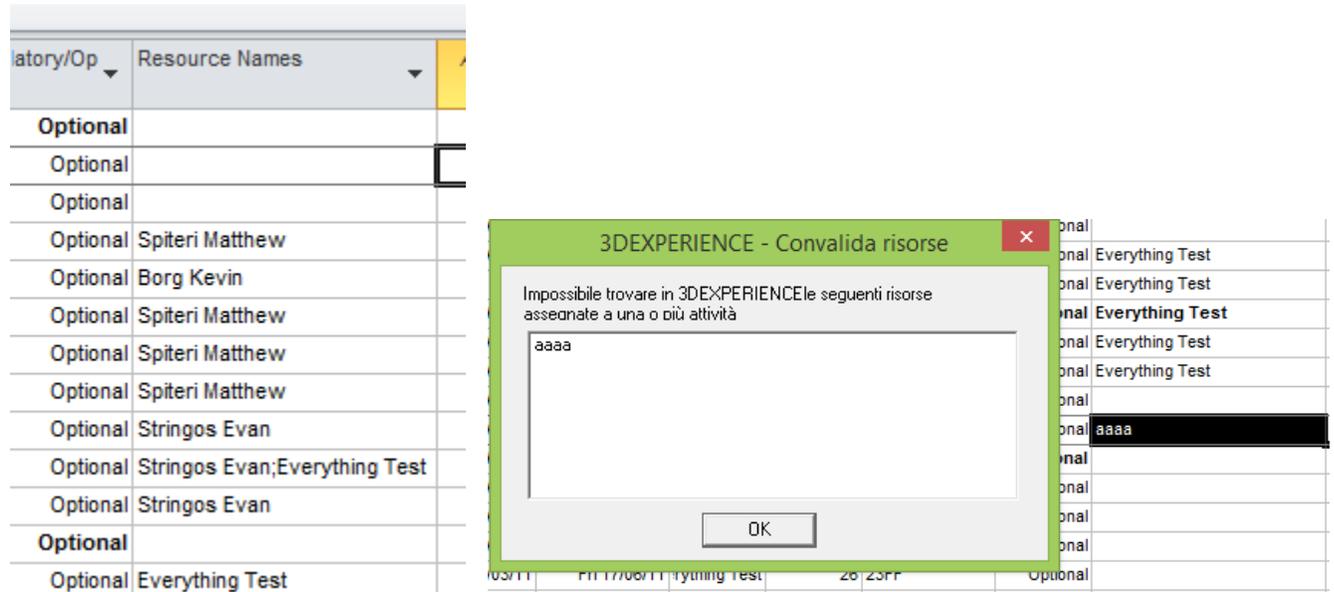
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9.3 Validate Resource

Check if Resources are recognized in PLM; use the command before merging a project from MS Project to PLM to validate the resource names.

Person names have to be provided as "LastName FirstName"; char ";" is used to separate two resources in Microsoft Project.

Before saving a project, MS Project integration performs a Validate Resource check.



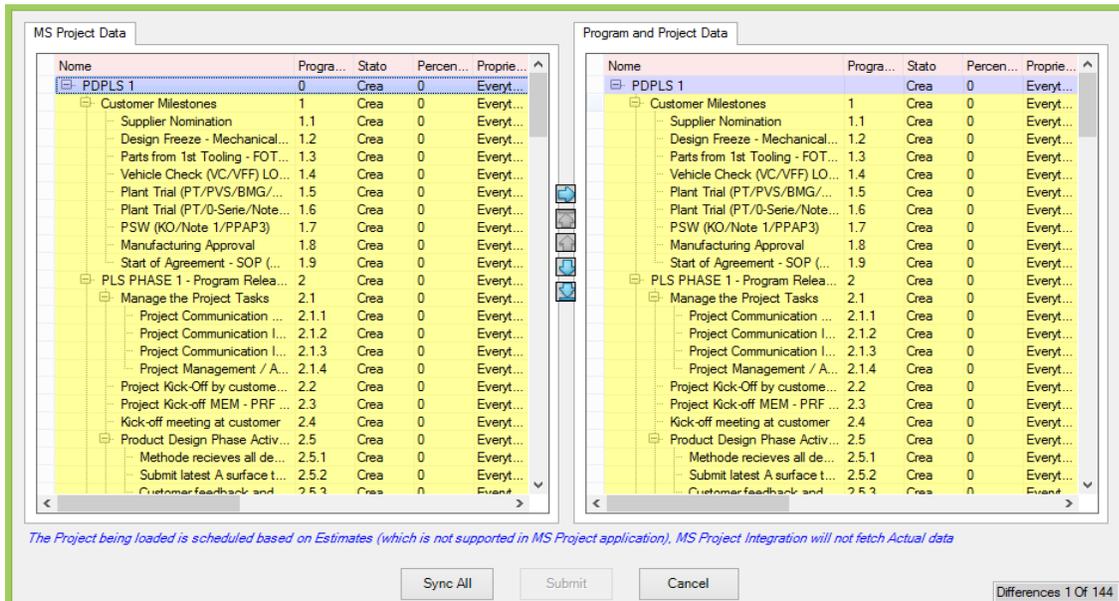
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9.4 Save and Reload Existing

Command "Save" syncs tasks information from MS Project to PLM

Command "Reload Existing" syncs tasks information from PLM to MS Project

Data that is transferred includes task names, task actual start and end dates, task actual duration, WBS ID, resource names, dependencies, and project schedule information including the "schedule from" attribute and constraints



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PM10 Project Template Management

| | | | |
|---------------------|--|---------------|--------|
| Purpose | Define and manage project template | Status | Define |
| Stakeholders | Project Administrator | | |
| Beginning | | | |
| Interactions | Project Administrator can create and update project template, used to create project with a standard structure | | |
| End | | | |
| Constraints | | | |

10.1 Project and Gate Templates definition

Project templates table contains components like folders, tasks and gates.

Project templates are used to standardize project planning processes and best practices.

Project Administrator can create project templates; templates can be updated to ensure that everyone is using the latest project implementation methodology.

Project Templates table can be found in Project Lead Home Page, under the project template tab

| Project Templates Filter:Active | | | | |
|--|--------------------|-----------------|--------|------------------------|
| Name ▲ | Estimated Duration | Owner | Status | Description |
| <input type="checkbox"/> CN Engineering Template | 69.0 Days | Test Everything | Active | CN Engineering Templat |
| <input type="checkbox"/> CN Process Template | 67.0 Days | Test Everything | Active | CN Process Template |
| <input type="checkbox"/> CN Supplier Template | 67.0 Days | Test Everything | Active | CN Supplier Template |
| <input type="checkbox"/> PDPLS - Template | 443.0 Days | Test Everything | Active | PDPLS - Master Templa |
| <input type="checkbox"/> RFQ - Template | 0.0 Days | Test Everything | Active | RFQ BOM Estimates M |

| | | | |
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10.2 Project Template creation

Step 1 From Project Templates table,

The screenshot shows the 'Project Templates' section of a software application. On the left, a navigation pane lists users, with 'Home Project Lead' circled in blue. The main area displays a table of project templates. Above the table is a toolbar with various icons, including a star icon (Add New) which is also circled in blue. Below the screenshot, a separate box shows the star icon in a square button.

| Name | Estimated Duration | Owner |
|-------------------------|--------------------|-----------------|
| APQP - Template | 90.0 Days | Test Everything |
| CN Engineering Template | 69.0 Days | Test Everything |
| CN Process Template | 67.0 Days | Test Everything |

Select icon to create a new template

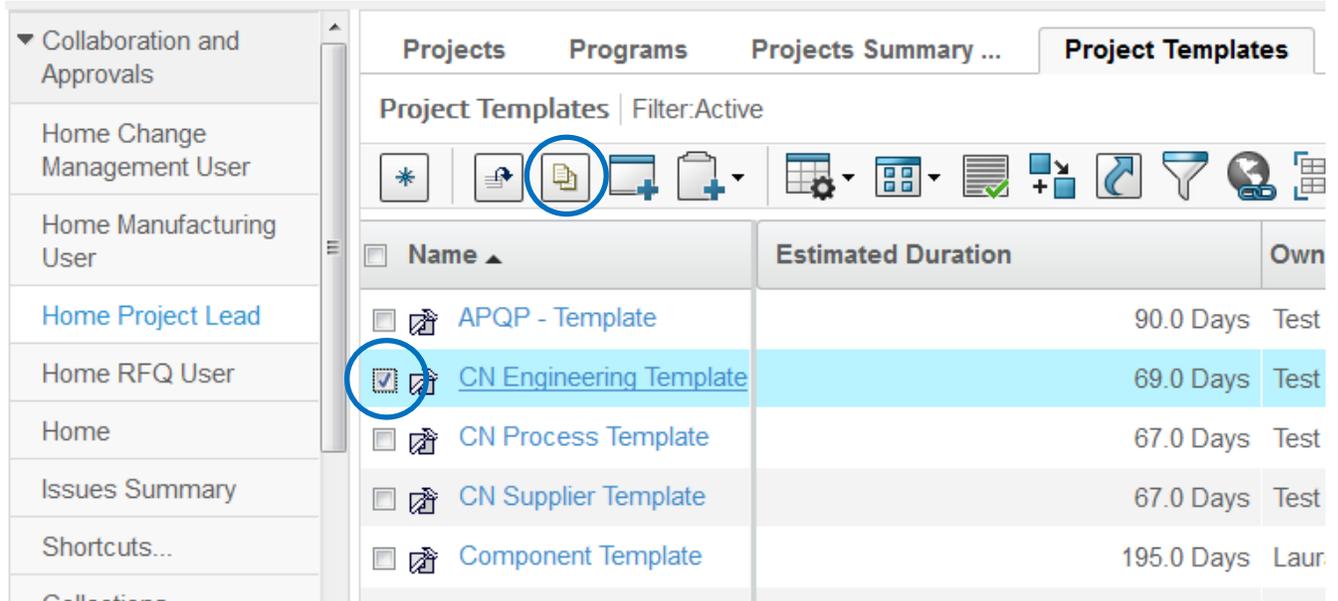
Step 2 Project Administrator has to define name and description

The screenshot shows the 'Create Project Template' form. The form has several sections: 'Type' (Project Template), 'Name' (required field), 'Policy' (Project Template), 'Description' (required field), 'Base Currency' (Euro), and 'Originator' (Test Everything). The 'Name' and 'Description' fields are highlighted in red italics, indicating they are required. The form has 'Done' and 'Cancel' buttons at the bottom.

| | | | |
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10.2.1 Project Template Clone/Copy

From the project template page, the user can select an existing template as a starting point for the creation of a new template.



After selecting the template, the system shows a new icon  that allows the user to clone the original template. The system fills the field *Name* and *Description* using a value derived from the original one.

CN Engineering Template|Clon...



Fields in red italics are required

Type
Project Template

Name
PC Clone Of CN Engir

Policy
Project Template

Description
CN Engineering Template

Base Currency
Euro

Originator
Joseph Zammit

| | | | |
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10.2.2 Project Template details

From Project Templates table, clicking on project template name,

| Name | Estimated Duration |
|--------------------------------|--------------------|
| APQP - Template | 90.0 |
| CN Engineering Template | 69.0 |
| CN Engineering Template cloned | 69.0 |
| CN Process Template | 67.0 |
| CN Supplier Template | 67.0 |
| Cor CN Supplier Template | 195.0 |
| PDPI S - template | 571.0 |

Project template information is shown in a new window.

| Task Name | Task Type | Id | Dependency | State | Estimated Du | Task required | Project Role | ? | Level |
|---------------------|---------------|----|-------------|--------|--------------|---------------|--------------|---|-------|
| CN Supplier Templat | Project Te... | | | Active | 67.0 Days | | | | |
| Administrative a | Task | 1 | 2 | Create | 1.0 Days | Optional | | | 1 |
| Components/Sw | Task | 4 | 0 | Create | 1.0 Days | Optional | | | 2 |
| Releasing Proci | Task | 6 | 0 | Create | 59.0 Days | Optional | | | 3 |
| Closure of CN - h | Task | 18 | 17:FS+0.0 d | Create | 0.0 Days | Optional | | | 4 |

| | | | |
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Project Administrator can define project schedule templates:

- Phases, Gates, Milestones and Tasks
- Task Dependencies with slack time
- Define mandatory and optional tasks
- Constraint types and dates

| Task Name | Task Type | Id | Dependency | State | Estimated Du | Task required | Project Role | ? | Level |
|---|-----------------|----|-------------------|--------|--------------|---------------|--------------|---|-------|
| PDPLS - Template | Project Temp... | | | Active | 443.0 Days | | | | |
| Customer Milestones | Phase | 1 | | Create | 393.0 Days | Optional | | | 1 |
| Supplier Nomination | Milestone | 2 | | Create | 0.0 Days | Optional | | | 1.1 |
| Design Freeze - Mechanical & Electrical | Milestone | 3 | 26:F S+0.0 d | Create | 0.0 Days | Optional | | | 1.2 |
| Parts from 1st Tooling - FOT's (RDV0/VFF) | Milestone | 4 | 55:F S+0.0 d,69:F | Create | 0.0 Days | Optional | | | 1.3 |
| Vehicle Check (VC/VFF) LOT B-Series | Milestone | 5 | 127:F S+0.0 d | Create | 0.0 Days | Optional | | | 1.4 |
| Plant Trial (PT/PVS/BMG/C-Series) 1 | Milestone | 6 | 135:F S+0.0 d | Create | 0.0 Days | Optional | | | 1.5 |
| Plant Trial (PT/0-Series/Note 3/D-Series/PPAP1) | Milestone | 7 | 143:F S+0.0 d | Create | 0.0 Days | Optional | | | 1.6 |
| PSW (KO/Note 1/PPAP3) | Milestone | 8 | 110:F S+0.0 d | Create | 0.0 Days | Optional | | | 1.7 |
| Manufacturing Approval | Milestone | 9 | 104:F S+0.0 d | Create | 0.0 Days | Optional | | | 1.8 |
| Start of Agreement - SOP (Mass Production) | Milestone | 10 | | Create | 0.0 Days | Optional | | | 1.9 |
| PLS PHASE 1 - Program Release and Concept | Phase | 11 | | Create | 360.0 Days | Optional | | | 2 |
| Manage the Project Tasks | Task | 12 | | Create | 360.0 Days | Optional | | | 2.1 |
| Project Communication External | Task | 13 | | Create | 300.0 Days | Optional | | | 2.1.1 |
| Project Communication Internal - Core team | Task | 14 | | Create | 360.0 Days | Optional | | | 2.1.2 |
| Project Communication Internal - Service | Task | 15 | | Create | 360.0 Days | Optional | | | 2.1.3 |

Functionalities used to manage tasks in project template are described in chapter “Work Breakdown Structure” in “Project Lead Management”.

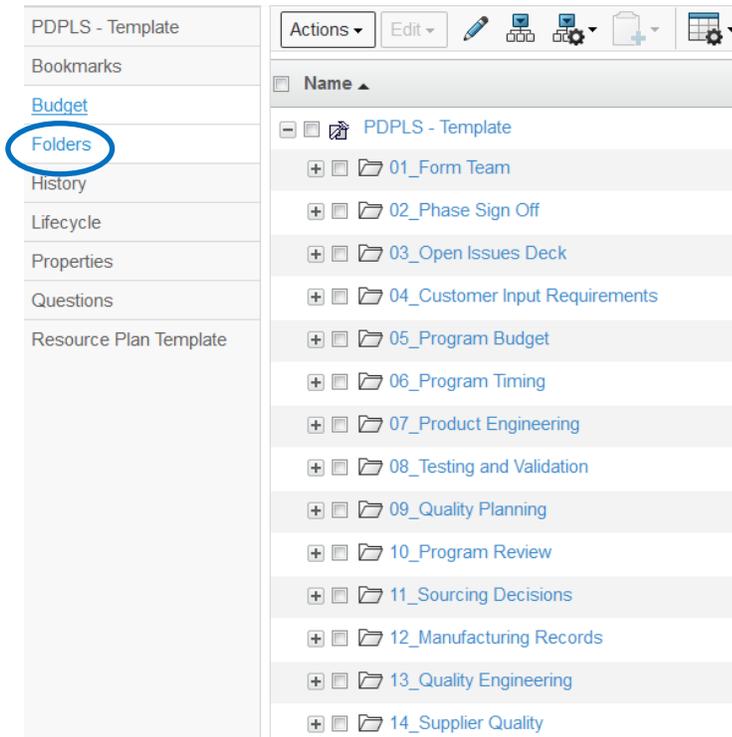
The following features are included for a project WBS but not for a project template WBS:

- Baseline
- Status flags (green, yellow, red) that indicate whether the task or project is on time or late
- Estimated start and finish dates (a template WBS only has an estimated duration)
- Actual start and finish dates
- Percent complete
- Owner (a task in a template has an owner but is not used during project creation)
- Assignees
- Approvals
- Risks
- Routes

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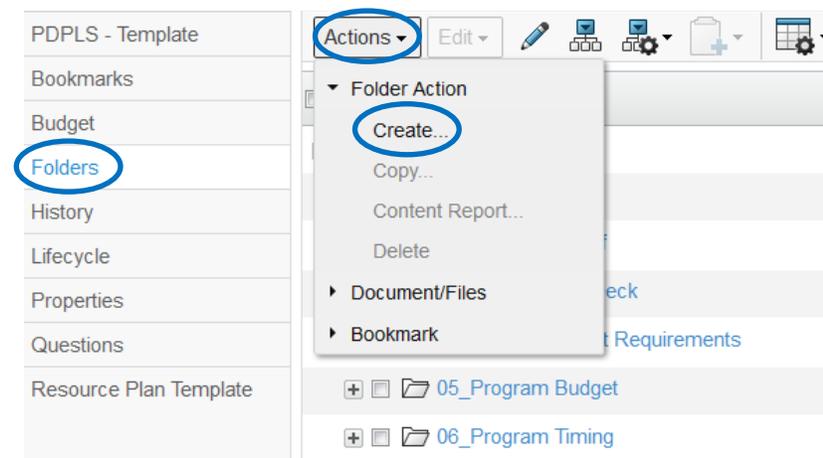
10.3 Folders Template definition

Project Administrator can define project template folders; there is no limit on the number of levels of a folder structure



10.3.1 Folder creation

From Actions menu, select the command Create. If new folder has to be created as sub-folder, before select the checkbox related to parent folder in folders table



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Project Administrator has to enter folder name and description.

During folder creation, the user can define folder access:

- **Yes:** for subfolders, the subfolder's access list will inherit the parent folder's access list. Whenever the parent's access list is changed, the same change is made to the subfolder's access list. The subfolder's access list can be changed directly without affecting the parent's list. For top-level folders, all project members are added to the folder's access list and are given Read access.
- **No:** the folder/subfolder's access list is not inherited from the parent. Changes to the parent or subfolder's access list are independent and have no effect on the other folder.

The screenshot shows a dialog box titled "PDPLS - Template|Create New ...". It contains several fields: "Type" (Workspace Folder), "Name" (empty), "Policy" (Workspace Vaults), and "Description" (empty). Below these is the "Inherit Access" section, which is circled in blue. It contains two radio buttons: "Yes" (selected) and "No". At the bottom are "Apply", "Done", and "Cancel" buttons.

| | | | |
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10.3.2 Folder details

Project Administrator can change name, description and access for folder: from folders table, clicking on folder name, a new window popup with folder details.

Using command Edit, the user can modify folder details.

03_Open Issues Deck

Workspace Folder (au...

Open Issues Deck

State : Exists

Owner : Test Everything

Modified : 10/14/2015 2:05:12 PM

| | | |
|---------------------|-------------------------------------|---------------------|
| 03_Open Issues Deck | <input type="button" value="Edit"/> | |
| Discussions | Name | 03_Open Issues Deck |
| Basic Information | Policy | Workspace Vaults |
| | Description | Open Issues Deck |
| | Originator | Test Everything |
| | Originated | Sep 13, 2015 |
| | InheritAccess | Yes |

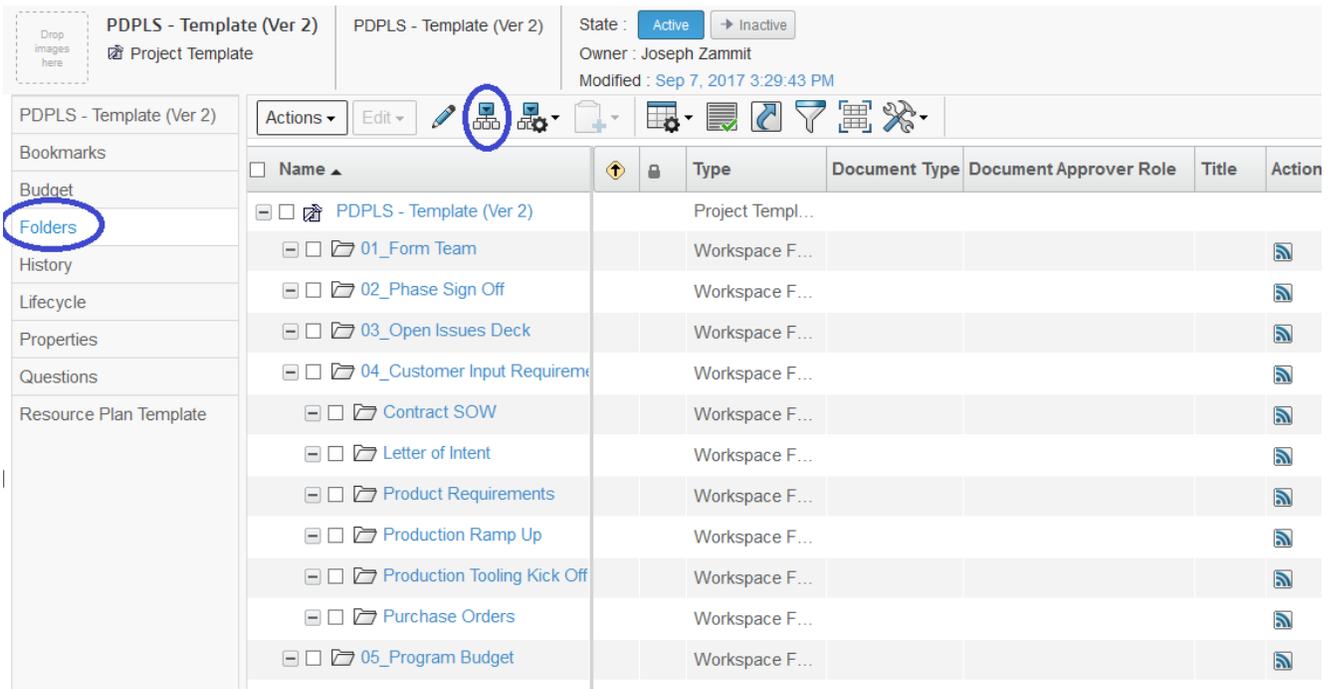
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10.3.3 Folders Accesses

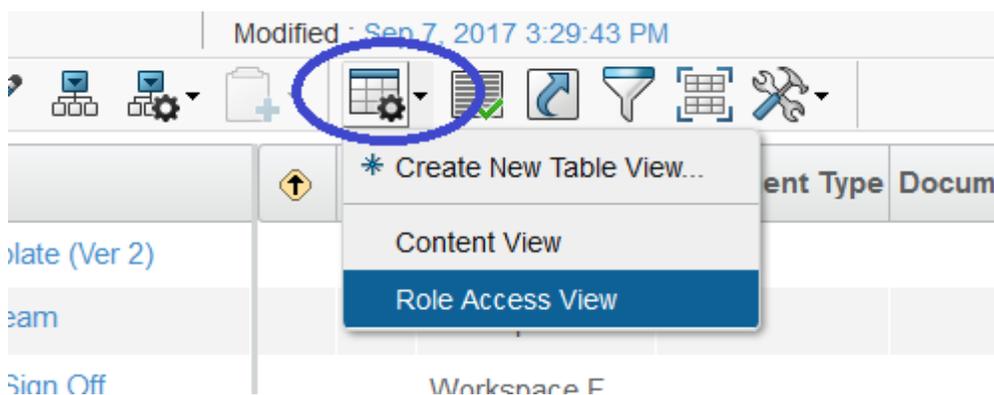
When setting up a project the Launch Manager (and Quoting Manager for RFQs) needs to setup access to the different project folders to each and every project member. This task is very administratively heavy and consumes a lot of time.

The approach is to define, for each folder at Project Template level, the access for each Project Role. Only the Project Administration will be able to maintain the Project Template folder definition. At project level, a dedicate function will apply the access defined in the template, to project members using the project role information.

After selecting the template, from main menu, select the command Folders; in order to setup the access for all folders and sub-folders, select the icon to expand the view



A dedicated table “Role Access View” shows a grid with “Folder Name” and “Project Role”; from the toolbar, select the “filter table” icon and select “Role Access View”



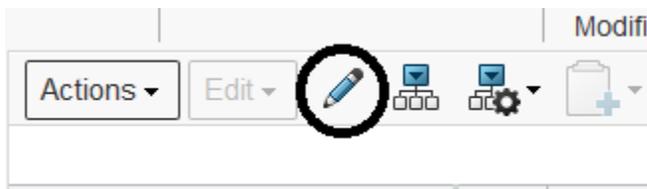
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The grid will show all project roles defined, not only the ones defined at Project Template, because during project execution, the Project Lead can add project role not used at project template.

| Project Role Access | | | | | | | | | | |
|-------------------------|-------------|------------|---------|--------------------|-----------------|-------------------|--------------------|-------------|------|------|
| Name | Owner | Default Us | Inherit | AM Account Manager | CA Cost Analyst | CC Change Coordin | CS Customer Servic | Fin Finance | GM G | |
| PDPLS - Template (Ve... | Joseph Z... | | | Read | Read | Read | Read | Read | Read | Read |
| 01_Form Team | Joseph Z... | Read | Yes | Read | Read | Read | Read | Read | Read | Read |
| 02_Phase Sign Off | Joseph Z... | Read | Yes | Read | Read | Read | Read | Read | Read | Read |
| 03_Open Issues Dis | Joseph Z... | Read | Yes | Read | Read | Read | Read | Read | Read | Read |
| 04_Customer Input | Joseph Z... | Read | Yes | Read | Read | Read | Read | Read | Read | Read |
| Contract SOW | Joseph Z... | Read | Yes | Read | Read | Read | Read | Read | Read | Read |
| Letter of Intent | Joseph Z... | Read | Yes | Read | Read | Read | Read | Read | Read | Read |
| Product Require | Joseph Z... | Read | Yes | Read | Read | Read | Read | Read | Read | Read |
| Production Ram | Joseph Z... | Read | Yes | Read | Read | Read | Read | Read | Read | Read |
| Production Tooli | Joseph Z... | Read | Yes | Read | Read | Read | Read | Read | Read | Read |
| Purchase Order | Joseph Z... | Read | Yes | Read | Read | Read | Read | Read | Read | Read |
| 05_Program Budge | Joseph Z... | Read | Yes | Add Remove | Read | Read | Read | Read | Read | Read |
| Affordable Cost | Joseph Z... | Read | Yes | Read | Read | Read | Read | Read | Read | Read |
| Currency Rate E | Joseph Z... | Read | Yes | Read | Read | Read | Read | Read | Read | Read |

Project Administration has to define, for each folder and for each Project Role, the access type.

- Select the Edit icon



- Select the Access type for each role

| Project Role Access | | | | | | | | | | |
|-------------------------|-------------|------------|---------|--------------------|-----------------|-------------------|--------------------|-------------|------|------|
| Name | Owner | Default Us | Inherit | AM Account Manager | CA Cost Analyst | CC Change Coordin | CS Customer Servic | Fin Finance | GM G | |
| PDPLS - Template (Ve... | Joseph Z... | | | Read | Read | Read | Read | Read | Read | Read |
| 01_Form Team | Joseph Z... | Read | Yes | Read | Read | Read | Read | Read | Read | Read |
| 02_Phase Sign Off | Joseph Z... | Read | Yes | Read | Read | Read | Read | Read | Read | Read |
| 03_Open Issues Dis | Joseph Z... | Read | Yes | Read | Read | Read | Read | Read | Read | Read |
| 04_Customer Input | Joseph Z... | Read | Yes | Read | Read | Read | Read | Read | Read | Read |
| Contract SOW | Joseph Z... | Read | Yes | Read | Read | Read | Read | Read | Read | Read |
| Letter of Intent | Joseph Z... | Read | Yes | Read | Read | Read | Read | Read | Read | Read |
| Product Require | Joseph Z... | Read | Yes | Read | Read | Read | Read | Read | Read | Read |

- Select Save when completed; the update can be executed several times

| | | | |
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Access Type definition:

- Read: a person with Read access can view folder properties and view accesses for the folder. Non-project members are only allowed "Read" access.
- Read Write: a person with Read Write access to a folder can perform the tasks described for Read access. Additionally, people with Read Write access can edit basic information for the folder.
- Add: a person with Add access to a folder can perform all Read and Write actions and can also add content to the folder and add subfolders.
- Remove: a person with Remove access to a folder can perform all Read and Write actions and can also remove subfolders.
- Add Remove: a person with Add Remove access to a folder can perform all Add and Remove actions and can also add and remove members from the access list and change access levels.

| | | | |
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10.4 Gates Template definition

Project Administrator can define Gate release criteria:

- Define checklists and checklist items
- For each checklist items, define Response Type (Yes/No, rating like 1-2-3-4-5, ...)

| Task Name | Task Type |
|---|------------------|
| PDPLS - Template | Project Template |
| Customer Milestones | Phase |
| PLS PHASE 1 - Program Release and Concept Development | Phase |
| Manage the Project Tasks | Task |
| Project Kick-Off by customer - SOW and LOI available | Task |
| Project Kick-off MEM - PRF issued and team formed | Task |
| Kick-off meeting at customer | Task |
| Product Design Phase Activities | Task |
| Process Design Phase Activities | Task |
| Quality Activities | Task |
| Tooling Purchase Order from Customer - to include prototype | Task |
| Gate 1 - Review and Sign off | Gate |

User can click on Gate name, in order to view all checklist defined.

To expand the selection, click on icon 

| Gate 1 - Review and Sign... | Checklists | | Deliverables | |
|-----------------------------|---|-------------|-------------------------------|--|
| | Name | Responsible | Description | |
| | Gate 1 - Review and Sign off | | Gate 1 deliverable as disc... | |
| | CH_01. Program Manager assigned | | 01. Program Manager assi... | |
| | CH_02. Preliminary Cross-functional Roster | | 02. Preliminary Cross-fun... | |
| | CH_03. Customer Inputs: | | 03. Customer Inputs: | |
| | CH_04. Commercial and Program Agreements: | | 04. Commercial and Progr... | |
| | CH_05. Deviation checklist | | 05. Deviation checklist | |
| | CH_06. Purchase Orders | | 06. Purchase Orders | |
| | CH_07. Program Funding Release | | 07. Program Funding Rele... | |
| | CH_08. Design Goals understood? | | 08. Design Goals underst... | |
| | CH_09. Baseline B.O.M. released and available to th | | 09. Baseline B.O.M. relea... | |

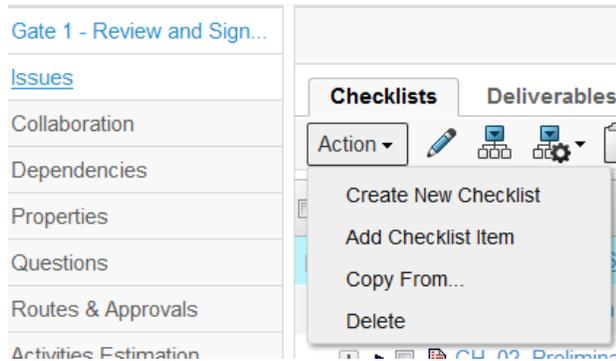
Actions menu contains command to work with the checklists, first select the gate,

| Gate 1 - Review and Sign... | Checklists | Deliverables |
|-----------------------------|------------------------------|--------------|
| | Action | |
| | Name | |
| | Gate 1 - Review and Sign off | |

| | | | |
|---------|----------|-------|------------------|
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Then user can:

- Create New Checklist: Project Lead can create a checklist
- Add Checklist Item: Project Lead can create a checklist item
- Copy From: checklists owner can copy checklist item
- Edit (command contained in Toolbar)
- Delete: Project Lead can delete checklists



The icon Edit allows user to modify description and response type.

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10.4.1 Checklist Creation

A checklist is composed by one or more checklist items. It can contain also other checklists (there is no limit on the number of levels of checklist structure)

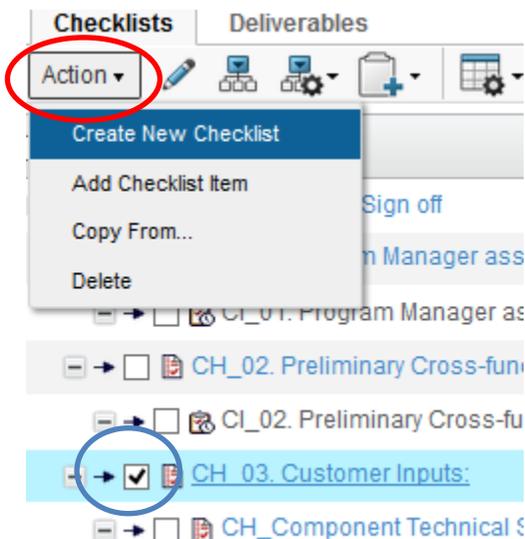
CH_03. Customer Inputs: : Checklist

| Name | Responsible | Description | Response Type | Comments |
|--|--------------|-------------------------------|---------------|----------|
| CH_03. Customer Inputs: | | 03. Customer Inputs: | | |
| CH_Logistics and Volume requireme | | Logistics and Volume re... | | |
| CH_Component Technical Specificat | | Component Technical S... | | |
| CI_Customer Manufacturing Require | Account M... | Customer Manufacturing... | N/A 1 2 3 4 5 | |
| CI_Key Customer contact list availab | Account M... | Key Customer contact lis... | N/A 1 2 3 4 5 | |
| CI_Project Timing Plan: | Account M... | Project Timing Plan: | N/A 1 2 3 4 5 | |
| CI_Reliability and Quality Goals defin | Account M... | Reliability and Quality Go... | N/A 1 2 3 4 5 | |
| CI_Volume and Mix (avg/max product | Account M... | Volume and Mix (avg/max... | N/A 1 2 3 4 5 | |

8 objects

New checklist

Step 1 In order to create a new checklist, select the checkbox related to Gate or parent checklist and select command Create New Checklist, from Actions menu

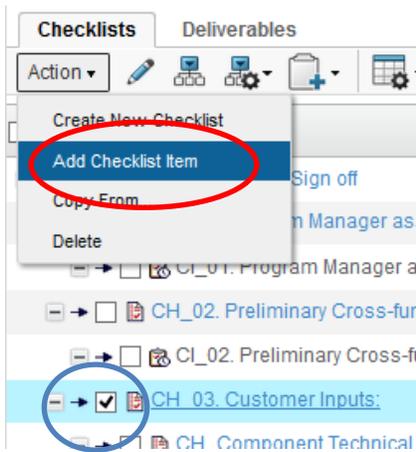


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The user has to define name and description (an auto naming function is provided)

Checklist item

Step 2 In order to create a new checklist item, select the checkbox related to parent checklist and select command Add Checklist Item, from Actions menu



User has to define name, description and response type (an auto naming function is provided)

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A Checklist is a collection of Checklist items, the user first creates a Checklist and then add to it one or more Checklist items. Each Checklist item is a question of the Checklist.

The user can modify the information of a Checklist or a Checklist item using the edit command

The screenshot shows a software interface with a toolbar at the top. The first icon in the toolbar, a pencil, is circled in blue. Below the toolbar is a 'Mass Update' dropdown menu. Underneath is a table with the following data:

| Name | Responsible | Description | Response Type |
|---------------------------------|-------------|------------------------------|---------------|
| CH_01. Program Manager assigned | | 01. Program Manager assigned | |
| CI_01. Program Manager assigned | PM Director | 01. Program Manager assigned | N/A 1 2 3 4 5 |

| | | | |
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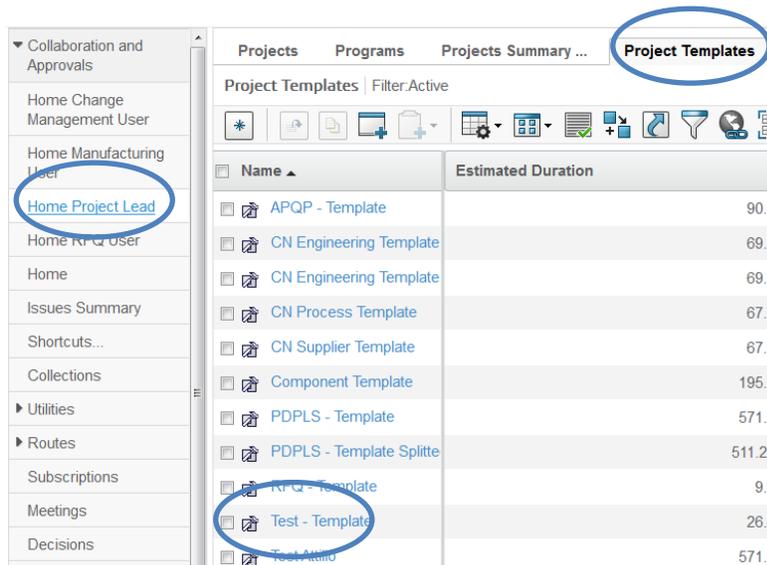
10.5 Question definition in templates

Capability to conditionally include tasks in a project's WBS when it is built from a project template. The conditions used to control the inclusion of the tasks are determined by the response to questions posed during project creation. A question can be assigned to more than one task meaning that a question can determine whether multiple tasks are included in a project. However a single task can be assigned only one question.

The project created using the template will be different depending on the answers. Some task will not be added to the wbs.

10.5.1 Create questions

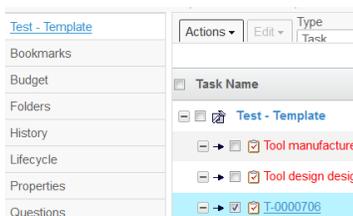
From the Project Lead command select the Project Template tab and then click the project template you need to work on



In the project Template task list select the 'optional' task

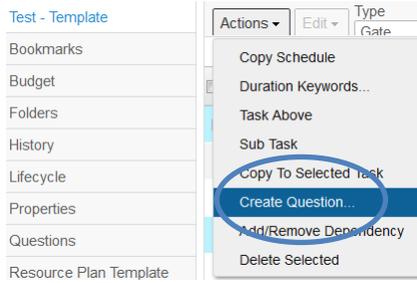
| Task Name | Task Type |
|--|------------------|
| <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Test - Template | Project Template |
| <input type="checkbox"/> <input checked="" type="checkbox"/> Tool manufacturer kick-off | Task |
| <input type="checkbox"/> <input checked="" type="checkbox"/> Tool design design reviews and approval from Customer | Task |
| <input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> T-0000706 | Gate |

From the Actions menu



Select Create Question

| | | | |
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- Assign a name to the question
- Enter the text of the question
- Select the question response

Create Question

Fields in red italics are required

Type
Question

Name
Question 1

Select Policy
Question

Question
Do you need to add documents?

Originator
Joseph Zammit

Question Response
TRUE

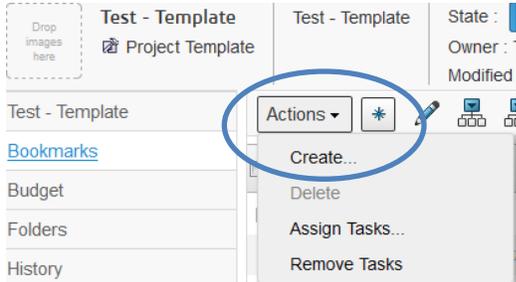
Alternatively the user can create a new question selecting the command Questions (from the left menu)

| | | | |
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| | | | | |
|------------------------|---------|------|------|----|
| Test - Template | Actions | Edit | Type | No |
| Bookmarks | | | Task | 1 |
| Budget | | | | |
| Folders | | | | |
| History | | | | |
| Lifecycle | | | | |
| Properties | | | | |
| Questions | | | | |
| Resource Plan Template | | | | |

| Task Name | Task Type | Id |
|--------------------|------------------|----|
| Test - Template | Project Template | |
| Tool manufacture | Task | |
| Tool design design | Task | |
| T-0000706 | Gate | |

and the command Create from the menu Actions



The commands listed under the Actions menu allow the user to assign or remove the question to/from a task. Now in the Question column there is a new icon indicating that a question is connected to the task.

| | | | | | | | |
|-----------|------|---|---|--------|----------|----------|--|
| T-0000706 | Gate | 3 | 0 | Create | 0.0 Days | Optional | |
|-----------|------|---|---|--------|----------|----------|--|

| Name | Type | Question | State | Question Response |
|-----------------------|------------------|----------------------------|--------|-------------------|
| PDPLS - Template | Project Template | PDPLS - Master Template | Active | |
| Sample Delivery added | Question | Add Sample Delivery pha... | Active | |
| Sample deliveries | Phase | Sample deliveries | Create | TRUE |

The command associated to the icon creates a question using autonaming.

| Name | Type | Question | State |
|----------------------------|------------------|--|--------|
| Test - Template | Project Template | Test - Template | Active |
| All required docs attached | Question | Are all the required documents attached? | Active |
| All tests are done | Question | Are all tests done | Active |
| Q-490 | Question | | Active |
| Q-721 | Question | | Active |

After the creation using this functionality the user has to compile the necessary information using the command edit and then

| | | |
|-------|----------|----------------------------|
| Q-721 | Question | Are the samples correct? - |
|-------|----------|----------------------------|

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10.6 Deliverables definition in Project Templates

Project Templates can contain a list of tasks, which can be completed with deliverables uploaded by task assignees, before task completion. Project Administrator can upload documents as template task deliverables, in order to define empty document used as template.

Tasks list and Project WBS Schedule tables contain a column with the number of documents uploaded.

Click on the number to open the task deliverables form

The screenshot shows the 'Test - Template' task interface. The task list includes columns for Task Name, Task Type, Id, Dependencies, State, Estimated Duration, and Task required. The 'Tool manufacturer' task is highlighted, and the number '3' in the Dependencies column is circled in red, indicating the number of documents associated with this task.

The screenshot shows the 'Tool manufacturer kick-off' task interface. The 'Deliverables' tab is active, displaying a table of documents. The 'Deliverables' tab is circled in blue. The table includes columns for Name, Title, Rev, Ver, Type, and Actions.

| Name | Title | Rev | Ver | Type | Actions |
|--------------------------------|--------------|-----|-----|----------|---------|
| 0/1 DOC-0000163 | Tool spec | 0 | 1 | Document | [Icons] |
| 0/1 DOC-0000185 | Tool spec | 0 | 1 | Document | [Icons] |
| 0/1 Tool new doc-1052164694606 | Tool new doc | 0 | 1 | Document | [Icons] |

The Deliverables Action menu contains command to create new document

The screenshot shows the 'Deliverables' action menu. The 'Create New' option is selected, and the 'Document...' sub-option is highlighted. The 'Deliverables' tab and the 'Create New' option are circled in blue.

Command "Create New -> Document" is composed by two steps:

- Define document information
- Upload attachments to document

| | | | |
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Command “Upload Files” instead is composed only by second step; document is created with an autoname function and other information are empty.

Command “Create New -> Document” first step opens a new form where user can specify information

Step 1 of 2: Specify Details

Fields in red italics are required

Name AutoName

Type ...

Policy ▾

Title

Description

Access Type ▾

Document Approver Role ▾

Document Type ▾

Next Cancel

Only the document name is mandatory (an auto naming function is provided), whereas all other information can be updated later

The other information used is:

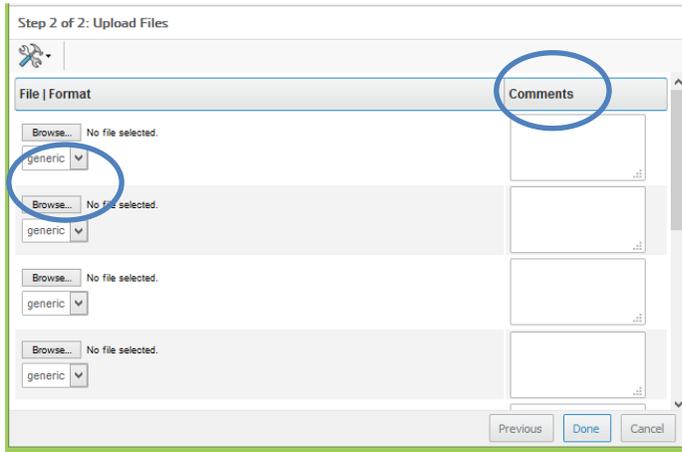
- Title, used to define document name in project execution
- Description and Document Type, only to complete description
- Document Approver Role, used to define Senior User role that will be involved in document approval process in project execution

Project Administrator has to define carefully the document attribute “Title”, because the attribute value will be used as document name in project execution.

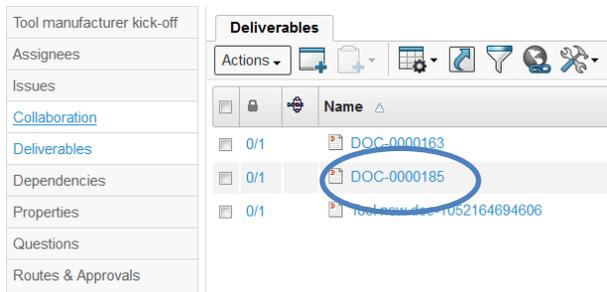
| | | | |
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When user select “Next” button, second step is executed (command “Upload Files” starts from this step)

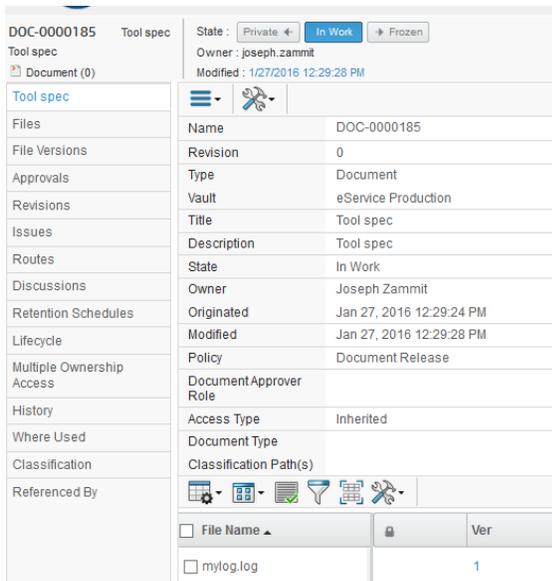
User has to select a file to be uploaded as attachment (click on Browse and search for a file from the file system). Before clicking the command Done, the user can add a Comment.



Document information can be updated also after creation, from Deliverables table select the link related to document to work on.

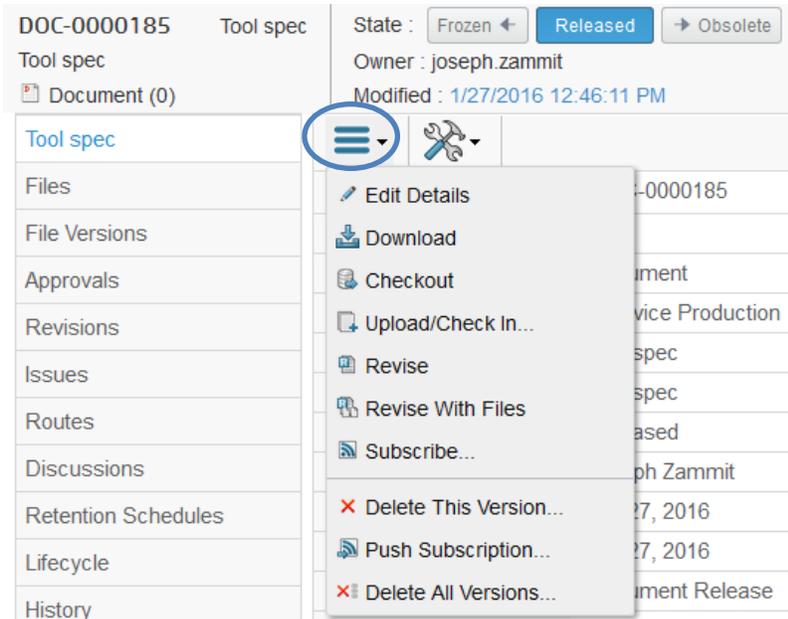


The system opens a window with the document information.

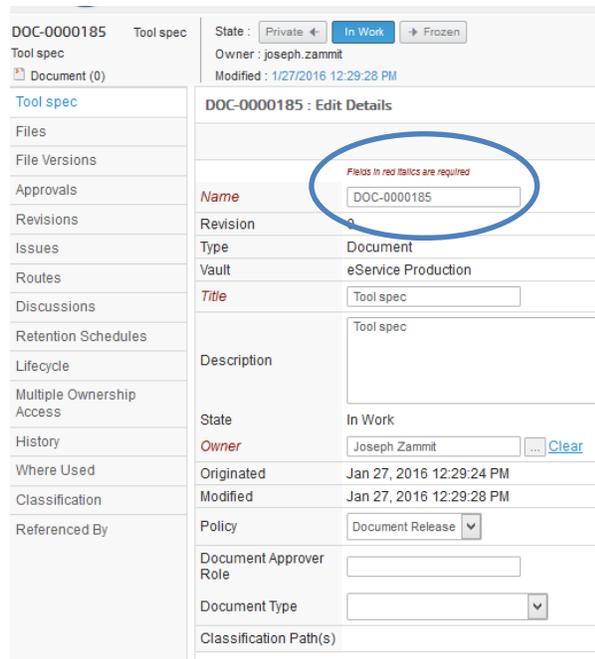


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The Action menu contains a command to update details or to update attachments uploaded



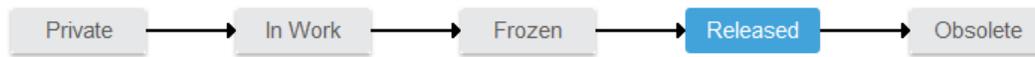
The command “Edit Details” allows user to update the document information, also the document name



| | | | |
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10.7 Document Approval Process

An approval process can be set up to each document. Each document has a life cycle composed of one or more states



A person that has the correct rights can promote the document in the next state of the life cycle. Each state of the life cycle has a precise meaning. Depending on the life cycle maturity and the rights of the persons, the document is visible to some users and hidden for others, some actions are allowed and other actions are denied see 4.3 Working with Deliverables for a detailed explanation.

The Document Approver Role field contains the list of the persons who are assigned the *Senior User* role.

| | | |
|------------------------|----------------------------|-----------|
| State | Released | |
| Owner | Joseph Zammit | ... Clear |
| Originated | Jan 27, 2016 | |
| Modified | Jan 27, 2016 | |
| Policy | Document Release | |
| Document Approver Role | TE Senior Tooling Engineer | |

AM Senior Account Manager
 CA Senior Cost Analyst
 CC Senior Change Coordinator
 CM Senior Change Manager
 CS Senior Customer Service
 DE Senior Design Engineer
 EE Senior Electrical Engineer
 Fin Senior Finance
 GM Senior General Manager
 IP Senior Intellectual Property
 LC Senior Lab Coordinator
 LM Senior Launch Manager
 LT Senior Lab Technician
 ME Senior Manufacturing Engineer
 MGR Senior Manager
 OM Senior Operations Manager
 PM Senior Plant Manager
 PURCH Senior Purchasing

During project execution, when a task assignee will complete a document, the system will perform the following operation:

- Check if Project Administrator has defined a Document Approver Role for the document
- If yes, the system will search for the user with the Senior User role specified, inside the project members
- If a user has the specified role, before move the state of the document from Frozen to Released, an approval task will be created, related to Senior Role user

When document information are completed, document can be released by Project Administrator, using Lifecycle functions



| | | | |
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10.8 Project Roles definition

In Project Template Schedule, Project Administrator can define Project Role assigned to task, to help Project Lead during project definition task assignment:

- During Project execution, Project Lead can define project member
- Project members can be associated to a specific role in a project
- Project Lead can assign tasks using Project Role definition

Project Roles are used during project execution, in order to assign tasks for people involved.

In order to define project role to tasks, Project Administrator has to select Edit icon

The screenshot shows a software interface for project management. At the top, there is a toolbar with various icons, including a circled 'Edit' icon. Below the toolbar is a table with columns: Task Name, Task Type, Id, Dependency, State, Estimated Duration, Task required, Project Role, and Level. The table lists several tasks, including 'Manage the Project', 'Project Kick-Off Meeting', 'Kick-off meeting', 'Product Design', 'Process Design', 'Quality Activities', 'Tooling Purchase', and 'PLS Gate 1 - Review'. A dropdown menu is open for the 'Project Role' column of the 'Kick-off meeting' task, showing a list of roles with 'Launch Manager' selected and circled in blue.

| Task Name | Task Type | Id | Dependency | State | Estimated Duration | Task required | Project Role | Level |
|--------------------------|-----------|----|-------------|--------|--------------------|---------------|--------------------|-------|
| PLS PHASE 1 - Program | Phase | | 0 | Create | 360.0 Days | Optional | | |
| Manage the Project | Task | 12 | 0 | Create | 360.0 Days | Optional | | 2.1 |
| Project Kick-Off Meeting | Task | 17 | 0 | Create | 0.0 Days | Optional | DE Design Engineer | 2.2 |
| Project Kick-off meeting | Task | 18 | 17:FS+0.0 d | Create | 5.0 Days | Optional | DE Design Engineer | 2.3 |
| Kick-off meeting | Task | 19 | 17:FS+0.0 d | Create | 1.0 Days | Optional | Launch Manager | 2.4 |
| Product Design | Task | 20 | 0 | Create | 1.0 Days | Optional | | 2.5 |
| Process Design | Task | 32 | 0 | Create | 100.0 Days | Optional | | 2.6 |
| Quality Activities | Task | 40 | 0 | Create | 75.0 Days | Optional | | 2.7 |
| Tooling Purchase | Task | 42 | 0 | Create | 5.0 Days | Optional | | 2.8 |
| PLS Gate 1 - Review | Gate | 43 | 0 | Create | 0.0 Days | Optional | | 2.9 |

Project Role drop down list:

The screenshot shows a vertical list of project roles. The roles are: Core Team Member, Design Engineer, Financial Reviewer, MEM Account Manager, MEM Finance, MEM General Manager, MEM Lab Technician, MEM Launch Manager, MEM Manufacturing Engineer, MEM Operations, MEM Product Design Engineer, MEM Product Electronics Engineer, MEM Purchasing, MEM Quality Engineer, MEM Supplier Quality Engineer, MEM Tooling, Program Manager, Project Assessor, and Project Lead.

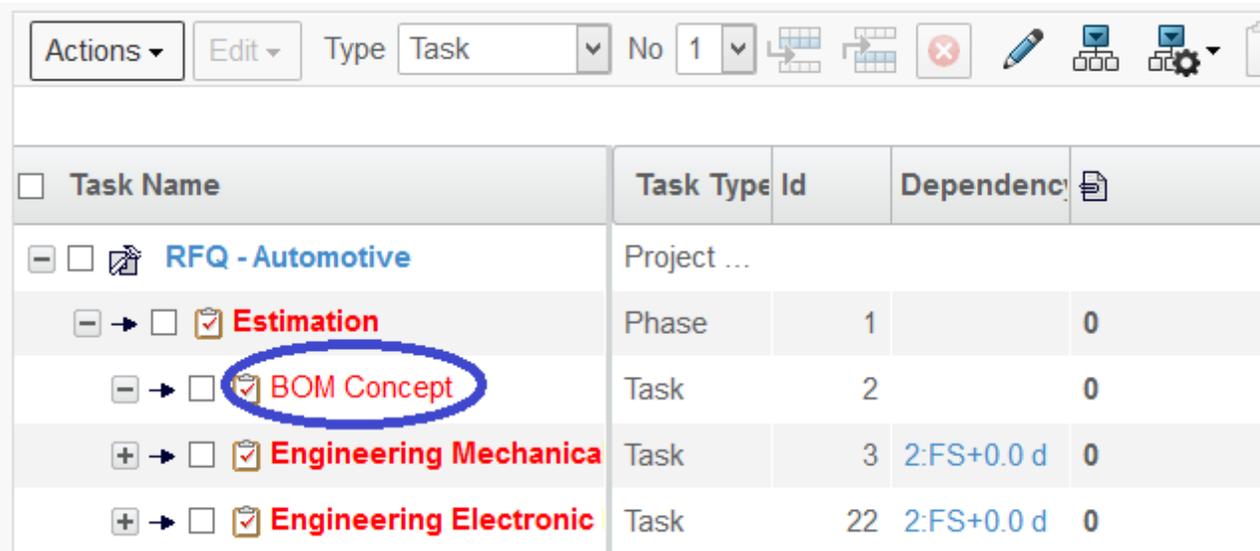
| |
|----------------------------------|
| Core Team Member |
| Design Engineer |
| Financial Reviewer |
| MEM Account Manager |
| MEM Finance |
| MEM General Manager |
| MEM Lab Technician |
| MEM Launch Manager |
| MEM Manufacturing Engineer |
| MEM Operations |
| MEM Product Design Engineer |
| MEM Product Electronics Engineer |
| MEM Purchasing |
| MEM Quality Engineer |
| MEM Supplier Quality Engineer |
| MEM Tooling |
| Program Manager |
| Project Assessor |
| Project Lead |

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10.9 Task assignees definition

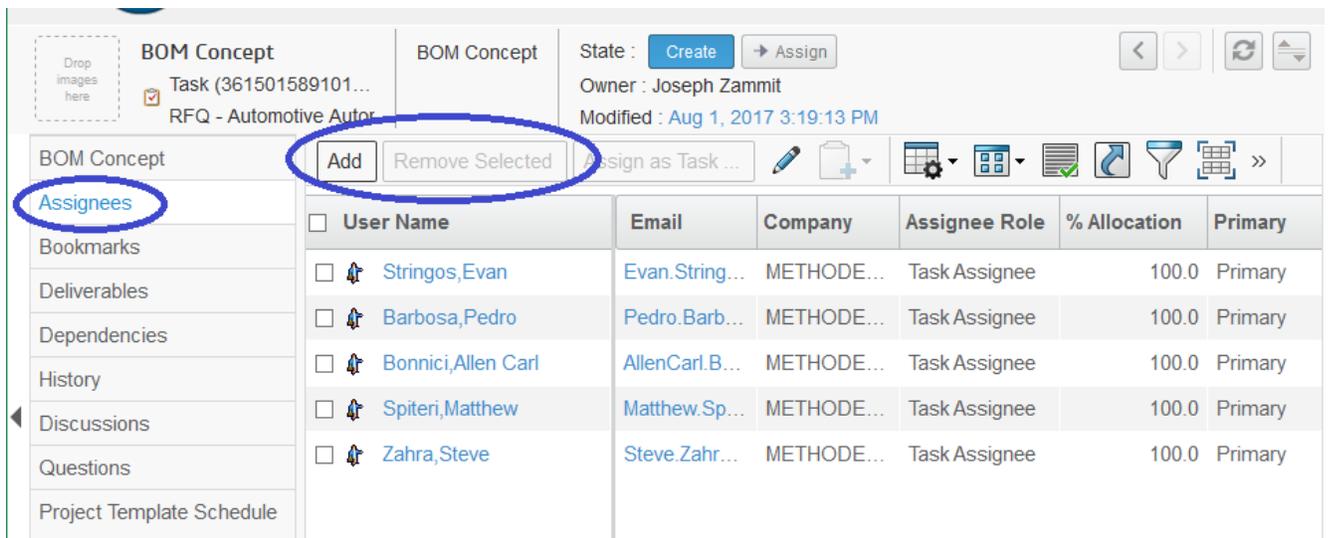
In Project Template Schedule, Project Administrator can define users assigned to tasks; it means Project Administrator can define the “default member” at project template as task assignees.

In order to define tasks assignees, Project Administrator has to select a task in template schedule



| Task Name | Task Type | Id | Dependency |
|------------------------|-------------|----|--------------|
| RFQ - Automotive | Project ... | | |
| Estimation | Phase | 1 | 0 |
| BOM Concept | Task | 2 | 0 |
| Engineering Mechanical | Task | 3 | 2:FS+0.0 d 0 |
| Engineering Electronic | Task | 22 | 2:FS+0.0 d 0 |

The function “Assignees” can be used to define the task assignees.



| User Name | Email | Company | Assignee Role | % Allocation | Primary |
|---|----------------|------------|---------------|--------------|---------|
| <input type="checkbox"/> Stringos,Evan | Evan.String... | METHODE... | Task Assignee | 100.0 | Primary |
| <input type="checkbox"/> Barbosa,Pedro | Pedro.Barb... | METHODE... | Task Assignee | 100.0 | Primary |
| <input type="checkbox"/> Bonnici,Allen Carl | AllenCarl.B... | METHODE... | Task Assignee | 100.0 | Primary |
| <input type="checkbox"/> Spiteri,Matthew | Matthew.Sp... | METHODE... | Task Assignee | 100.0 | Primary |
| <input type="checkbox"/> Zahra,Steve | Steve.Zahr... | METHODE... | Task Assignee | 100.0 | Primary |

The Project Administrator can use the functions “Add” and “Remove Selected”, to add or remove users from task assignees list.

The function “Assign as Task Owner” has not to be used; the values “Assignee Role”, “%Allocation” and “Primary” are not used during project creation.

| | | | |
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