







Project Manager Use Cases

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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 standard structure	o create	project with a
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.

BOSCH	Bosch Project from template:PDPLS - State : Creat & Project Space (2914 39 Template Splitted Owner : ellas r Modified : 2/15 Modified : 2/15 Modified : 2/15 Modified : 2/15	te → Assign noussa j/2016 12:21:25 PM	
Bosch	Activities Estima Gantt Chart Phase Gate View		
Collaboration	Actions - Edit - Type No 🕮 🔚 🔞 🖉 💂 🜉 -	🔍 💷 • 📾 • 🔲 🖉 🐨 🗞	
Details			
Execution	Mame	Type Id 🔺 Dependency 🖶	
Experiments	- Rosch	Project S	
Financials		Phage 1 0	
Folders		rilase i u	
Objectives	■ → I PLS PHASE 1 - Program Release and Concept Development	Phase 11 0	
People	🗄 🕳 🔄 🖓 Manage the Project Tasks	Task 12 0	
Schedule	→ Project Kick-Off by customer - SOW and LOI available	Task 18 2:FS+0.0 d 0	Dependencies,
Members and Roles		Task 19 18:FS+0.0 d	links to other tasks
	→ Project Kick-off MEM - Finance	Task 20 18:FS+0.0 d 0	
	→	Task 21 18:FS+0.0 d 0	
	→ Project Kick-off MEM - PD	Task 22 18:FS+0.0 d 0	
	→ □ V Kick-off meeting at customer	Task 23 18:FS+7.5 ck 0	
	🕢 🛥 🥅 🕑 Product Design Phase Activities	Task 24 0	
		Task 50 0	

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.

Create		Assign	_ →	Active		Review	⊢—•	Complete	_ →	Archive
--------	--	--------	------------	--------	--	--------	-----	----------	------------	---------

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

Create new Project				
%.				
	Fleids in red italics are required			
Name		AutoName		
Type	Project Space]	Project Date	Jun 3, 2015
Description				
Project Scheduling				
Schedule From	Project Start Date 🗸		Default Constraint	As Soon As Possible 🗸
Related Info				
Business Unit		<u>Clear</u>	Base Currency	Euro 🗸
Program		<u>Clear</u>	Project Visibility	Members V
Business Goal		<u>Clear</u>	Policy	Project Space V
				Done Cancel

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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

Create new project f	rom existing			
-≫				
	Fields In red Italics are required			^
Source Project	P-0000110 Cle	ar		
Name	Copy of RENAULT I-540 Aut	oName		
Туре	Project Space	Project Date	Jul 1, 2015	
Description	Test2 PDPLS - Template			
Copy Options	Related Projects Financial Dat	a 🖌 Folders		
Project Scheduling				
Schedule From	Project Start Date	Default Constraint	As Soon As Possible 🖌	
Related Info				Ļ
			Done Cancel	

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.

Create new project	t from file					1	
×2.						🐑 🕘 🔹 🕆 🚺 🖡 🕨 Th	iis PC 🔸 Downloads
	Fields in red Italics are required				^	Organize 👻 New folde	a
Import From File	Browse No file selecter	Pret	view			^	Name
Name		Au	toName				Default.csv
Туре	Project Space		Project Date	Jun 3, 2015		Desktop	🔁 Linea Trasporto D60.pdf
						Downloads	
Description						Music	
Description						Pictures	
						Local Disk (C:)	
Project Scheduling	g					HP_TOOLS (E:)	
Schedule From	Project Start Date 🗸		Default Constraint	As Soon As Possible \vee		😪 afumagalli (\\cdr	
Related Info						🖵 afumagalli (\\cdr	
Rusiness I Init			Base Currency	Furn		😪 cdm (\\cdmgrou	
Business onit	Clear		Base ourrency	Laio	~	🖵 cdm-archivio (\\ 🗸	<
				Done Cancel		File n	ame: Default on

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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

Create new project	from template				
*∻-					
	Fields In red Italics are required				^
Project Template		<u>Cle</u>			
Questions	No question to respond		Predict Schedule		
Name		Auto	oName		
Туре	Project Space		Project Date	Jun 3, 2015	
Description					
Copy Options	Financial Data Folders	3	Resource Template		
Project Scheduling					
Schedule From	Project Start Date		Default Constraint	As Soon As Possible \vee	~
				Done	1

Search Refinement		Sear	ch Results						Results: 7
Search Q	C	[-	•••	+	7 🗏 🔆				
Case Sensitive		Name	•	۵	Current Phase	Туре	Status	Owner	Estimated Fini
Limit to 100 results			CN Engineering Template		Administrativ	Proj	Active	Test	Aug 17, 2015
Туре	^		CN Process Template		Administrativ	Proj	Active	Test	Aug 14, 2015
Project Template			CN Supplier Template		Administrativ	Proj	Active	Test	Aug 13, 2015
Name			PDPLS - Template		PLS PHASE	Proj	Active	Test	Feb 2, 2017
		0	PDPLS - Template rev 1		Customer Mi	Proj	Active	Test	Feb 2, 2017
Revision			PDPLS - Template rev 2		Customer Mi	Proj	Active	Test	Feb 2, 2017
State			RFQ - Template	•	Engineering	Proj	Active	Test	Mar 31, 2015
Description									
Policy		<	>	<					>
	v								Submit

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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.

Project Scheduling			
Schedule From	Project Start Date 🗸	Default Constraint	As Soon As Possible 🗸
Related Info			
Business Unit	Clear	 Base Currency	Euro
Program	<u>Clear</u>	 Project Visibility	Members V
Business Goal	<u>Clear</u>	 Policy	Members V
			Done Cancel

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

P-0000110	Properties Pre	eferences Duration	Keywords Lifecycle	History	Related Projects	Images	
Collaboration	🗖 🙆 🔆 -						
Details		Fields in red Italics are required					
Execution	Туре	Project Space					
Experiments	Name	P-0000110					
Financials	Policy	Project Space					
Folders	Project Owner	Track Diverse division					
Objectives	Project Owner	Test Everydning					
People							
Schedule	Description				Base Currency	Euro	
				,d			
	Project clobus	Create					
	Visibility	Members					July - 2015 -
	Creation Date	Jun 1, 2015					Su M T W Th F Sa
	Company Name	Company Name					28 29 30 1 2 3 4
	Business Unit		Clear				5 6 7 8 9 10 11
	Designation		Clear				12 13 14 15 16 17 18 19 20 21 22 23 24 25
							26 27 28 29 30 31 1
	Schedule From	Project Start Date			Project Date		2 3 4 5 6 7 8
	Estimated Start Date	Project Finish Date Project Start Date			Actual Start Date		
	Estimated Finish	Mar 7, 2017			Actual Finish Date		
	Estimated Duration	110.000,0			Actual Duration	0.0 Days	
	Default Constraint	As Soon As Possible					
		As Soon As Possible As Late As Possible					Done Cancel

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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

P-0000110	Properties Preferences Duration Keywords Lifecycle History Relate	ed Projects Imag
Collaboration	Project Preferences	
Details		
Execution		
Experiments	Freids in red names are required.	~
Financials	Enable Approval	
Folders	Schedule Based On Estimated V	
Objectives	Duration Unit Days 🗸	
People	Send Reminder On due date	
Schedule	Recurrence Interval Do not send additional reminders	
	Effort Settings	
	Effort Notifications FALSE ¥	
	Effort Submission Task V	
	Assigned Task Notification Setting	
	Send Reminder On Estimated Start date	
	Recurrence Interval Do not send additional reminders	
	Resource Plan Mode Timeline 🗸	
		~
		Cancel

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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)

Activities Estima Ga	ntt C
Actions Edit Task	
Copy Schedule	L
Deliverables Report	
Add/Remove Dependency	
▼ Add Task	stor
Task Above	Prc
Sub Task	Pro
 Add Project 	Dre
Project Above	FIC.
Sub Project	Rel
 Assign 	es
 Remove/Delete 	
Mark as Deleted	
Delete Selected	
Remove Project	
Open in MS-Project	

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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Activities Estima	Gantt Char	rt Phase	e Gate	View			
Actions • Edit •	Type Task 🗸	No 1 🗸 🖷	-	8	ø	.	æ
	Task						
Name	Change Task Gate						Ту
🖃 🗌 👔 P-0000110	Milestone						Prc
🛨 🔶 📄 🕑 Custo	Phase mer wilestones						Ph

The following characters are not allowed in task name: " # \$ @ % * , ? < > [] | : \

Activities Estima Gantt Chart Phase Gate View												
Actions • Edit • Type No	- 🗐	-		1 💎 💽 1	# V	2.						
Mass Update 🔍												
									Estimated		1	Actual
Name	Туре	ld 🔺	Dependency	Ð	٨	State	%	Progress	Duration	Start Date	End Date	Duration
🖃 🗌 🎽 P-0000110	Project S					Create	0.0		443.0 Days	Jul 1, 2015	Mar 7, 2017	0.
	Phase	1	r	0		Create	0.0		393.0 Days	Jul 1, 2015	Dec 28, 2016	0.
■ → 🔲 🕑 PLS PHASE 1 - Program Release and Concept Develop	Phase	11	r	0		Create	0.0		360.0 Days	Jul 1, 2015	Nov 11, 2016	0.
💽 🗕 📄 💟 Manage the Project Tasks	Task	12	r	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	r	0		Create	0.0		0.0 Days	Jul 1, 2015	Jul 1, 2015	0.
→ □ 😨 🙆 Project Kick-off MEM - PRF issued and team forme	Task	18	17:FS+0.0 d	0		Create	0.0		5.0		Days 🖌 5	0.
→ □ ♥ Kick-off meeting at customer	Task	19	17:FS+0.0 d	0		Create	0.0			Do	ne Cancel 5	0.
💽 🕂 📄 🕑 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	r	0		Create	0.0		100.0 Days	Aug 13, 2015	Dec 30, 2015	0.
⊕ → □ ♥ Quality Activites	Task	44	r	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	0		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	0		Create	0.0		0.0 Days	Aug 13, 2015	Aug 13, 2015	0.
✓ → □ ♥ PLS PHASE 3 - Production Development	Phase	48	r	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

Activities Estima Gantt Chart Phase Gate View		
Actions - Edit - Task - 1 - 1 - 1 - 1	i 🖧 - 🗍	- 🖪 - 📃 🖉
Mass Updat 🥑 Undo		
3< Cut		
Name Copy	Туре	Id 🔺 Dependency
r _ → [Task	19 17:FS+0.0 d
Paste Above	Task	20
r → 🔲 🗹 Methode recieves all design data	Task	21 19:FS+0.0 d
🖃 🗕 🕞 💟 Submit latest A surface to Customer	Task	22 21:FS+0.0 d
F □ → □ ♥ Customer feedback and ok	Task	23 22:FS+0.0 d
Design Activities	Task	24 21:FS+0.0 d
🖷 🗕 🔲 😰 Concept design review at Methode	Task	25 24:SS+0.0 d
- → ✔ 🕅 Design Freeze	Task	26 24:SS+0.0 d
F → 🔲 😨 Gate 1 Engineering documentation is initiated ar	Task	27 24:SS+0.0 d

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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**).

Activities Estima Gantt Chart Phase Gate View								
Actions • Edit • Type No Mass Update •								
Name	Туре	Id Dependency	Ð					
🖃 📰 🎓 Test 1	Project S							
⊢ → □ ♥ Customer Milestones	Phase	1	0					
► → □ ♥ Supplier Nomination	Task	2	0					
→ ▼ Design Freeze	Task	3 47:FS+0.0 d	0					
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



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"

🖃 → 🔄 🕑 Bought-in Tools	Task	52		0
🖃 🗕 🔲 🕑 Tool manufacturer kic	Task	53	32:FS+0.0 d,34:FS+0.0 d,35:FS+0.0 d,4	0
🖃 🗕 🗌 🕑 Tool design design re	Task	54	53:FS+0.0 d	0
🖃 🗕 🔲 🕑 Tool manufacture	Task	55	54:FS+0.0 d	0
🖃 🕂 🖸 PFMEA + QCP for eac	Task	56	54:SS+0.0 d	0
🖃 🔶 🗌 🕑 Reciept of FOT (First-	Task	57	55:FS+0.0 d	0
🖃 🗕 🔲 🕑 STA review assessme	Task	58	57:FS+0.0 d	0
🖃 🔶 🔲 😨 Tool tuning loop 1	Task	59	58:FS+0.0 d	0

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

— — I M Recept of tuned parts	IdSN	00	334 3 - 070 a	U	0,
■ → □ I STA review assessment and feedback	Task	61	60:FS+0.0 d	0	<mark>٨</mark> ٤
🖃 🗕 🔲 😨 Tool Tuning Loop 2	Task	62	61-52-0.0-0	0	A٤
🖃 🗕 🗹 🗹 STAreview assessment and feedback	Task 🤇	63	RENAULT 1540:45:FS+0.0 d,62:FS+0.0 d	0	As
$\blacksquare \Rightarrow \square$ 🕲 Bought in Components	Task	64		0	As
	Task	65	32:FS+0.0 d,34:FS+0.0 d,35:FS+0.0 d,46:FS+0.	0	<mark>٨</mark> ٤
🗆 🖕 🗖 🕫 Component design design reviews on	Tack	66	65 F S+0.0 d	0	٨٩

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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	
⅔-	
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	💌 💿 🗔 🛄 - 🗔 -	7 😪 🕉	& -				
Locations	Title	Frequency	Start Date	End Date	Day Number	Notes	^
	Independence Day Malta	Non-Recurrence	Sep 20, 2016	Sep 21, 2016		Independence Day Malta	_
	Good Friday	Non-Recurrence	Mar 24, 2016	Mar 25, 2016		Good Friday	
	Saint Joseph	Non-Recurrence	Mar 18, 2016	Mar 19, 2016		Saint Joseph	
	Saint Paul and Saint Peter	Non-Recurrence	Jun 28, 2016	Jun 29, 2016		Saint Paul and Saint Peter	
	Freedom Day	Non-Recurrence	Mar 30, 2016	Mar 31, 2016		Freedom Day	
	Christmas 2016	Non-Recurrence	Dec 24, 2016	Dec 25, 2016		Christmas 2016	
	Saturday	Weekly			Saturday		
	Immaculate Conception	Non-Recurrence	Dec 7, 2015	Dec 8, 2015		Immaculate Conception	
	New Years 2017	Non-Recurrence	Dec 31, 2016	Jan 1, 2017		New Years 2017	
	Victory Day	Non-Recurrence	Sep 7, 2016	Sep 8, 2016		Victory Day	
	Summer Shut Down 2016	Non-Recurrence	Aug 14, 2016	Aug 19, 2016		Summer Shut Down 2016	
	Labour Day	Non-Recurrence	Apr 30, 2016	May 1, 2016		Labour Day	
	Saint Pauls Shipwreck	Non-Recurrence	Feb 9, 2016	Feb 10, 2016		Saint Paul's Shipwreck	
	Christmas 2015	Non-Recurrence	Dec 24, 2015	Dec 25, 2015		Christmas 2015	
	Christmas Shut Down 2015	Non-Recurrence	Dec 22, 2015	Jan 4, 2016		Christmas Shut Down 2015	\checkmark
						Page 1 of 1	

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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

 Collaboration and Approvals 	PowerView					
	Tasks Issues Approval Tasks	Approval I	ssues Pr	rojects M	y Calendar	
Home Engineering User	/ 🗔 📴 🗔 - 📰 - 🔜	270	≣ ⅔•			
Home Change Management User	Name	🚯 Slip Day	s 🖻	6	State	%
Issues Summary	DV report analysis	1 🏫 20	0	0	Review	
Shortcuts	Short list design improvements	14	0	0	Assign	C
Collections	Product Design Review	A 0	0	1.45	Review	÷
Subscriptions			•	. 4	Neview	2
▼ Team	CAD work (design improvements)	0	1 🎦	0	Assign	

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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 PRJ-0000001 Project Space Name Tool design design reviews and approval from Customer Collaboration Task Name Policy Project Task Deliverables Owner Barbara, Johann Dependencies Brief Description TDR's signed and approved PD managing principal Properties State Create Routes & Approvals Creation Date Apr 5, 2016 Task Constraint Type As Soon As Possible Task Constraint Date Estimated Start Date Actual Start Date Apr 6, 2016 Estimated Finish May 10, 2016 Actual Finish Date Date Estimated Duration 25.0 Days Actual Duration Calendar

TE Tooling Engineer

0.0 Days

Step 3 Select icon "..." related to field Calendar

	Properties Life	cycle History
_	📮 🗟 🔆 -	
	Creation Date	Apr 5, 2016
	Task Constraint Type	As Soon As Possible V Task Con
	Estimated Start Date	Apr 6, 2016
_	Estimated Finish Date	May 10, 2016
_	Task Requirement	Optional V
	Calendar	Clear
	Project Role	TE Tooling Engineer
	Cost	

Project Role

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

Search Refinement		Search Results 1 - 4 of app	rox. 4 Resi	ults Pag	e Size: 🚦	50 🕨 (Max Value: 1000) 🛛 🕅 🗐 🕇 1
	Q	🔄 🔍 - 👞 - 📑 - 📑	-	H 3	È-		
 Taxonomies 	^	Name 🔺	Revisio	Туре	Title	0	Description
▼ Types	- (All Working days	75144	Work			Calendar without week-end
🗁 🗹 Work Calendar(4)		Om Egypt	99144	Work			Calendar Egypt
▼ Attributes		Ot Malta	11444	Work			Calendar Malta
Autores		Only weekend	16144	Work			Calendar with only weeke
Name							
Originated							
Modified							
Description							
Comment							
	×		٢.				
<	>						Submit

Step 5 Save the changes

Tool design design revie	Properties Life	cycle History	
Assignees	🗔 🗟 🔆 -		
Issues	Creation Date	Apr 5, 2016	^
Collaboration	Task Constraint Type	As Soon As Possible V Task Constraint Date	
Deliverables	Estimated Start Data	And 9, 2019	
Dependencies	Estimated Finish Date	May 10, 2016	
Properties	Task Requirement	Optional V	
Routes & Approvals	Calendar	All Working days Clear	
	Project Role	TE Tooling Engineer	
	Cost		
	Design Center	- V	
	Duration/Effort (Hours)	0	
		Done Cancel	Ĭ

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

Notice: Task Owner's calendar is differ	rent from task Calendar.
15 	ОК

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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
Cast	

Estimated Start Date	Apr 6, 2016
Estimated Finish Date	Apr 30, 2016
Estimated Duration	25.0 Deve
Calendar	All Working days
Project Role	TE rooting 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.

Search Refinement	Q 2	Searc	h Results Q- 💽 - 📑	1	- 50 of approx. 217 Results Page Size: 50	▶ (Max Value: 1000) H (12345)
State: Acuve		🗌 Nai	me 🔺		Email Address	Work Phone Number
 Taxonomies 	^	□ \$	3DIndexAdminUse	r	L	
 Types 		□ \$	Adam Lake		Adam.Lake@methode-eur.com	
Person(217)		□ \$	Admin Platform		admin_platform@methode-eur.com	Unknown
 Attributes 		□ \$	Adrian Abdilla		Adrian.Abdilla@methode-eur.com	
Attibutos		□ \$	Ahmad Soufan		Ahmad.Soufan@methodemideast.com	
Name		□ \$	Ahmad Moudallal		Ahmad.Moudallal@methodegermany.com	
Originated		□ \$	Alan Psaila		Alan.Psaila@methode-eur.com	
Modified		□ \$	Alen Hasic		Alen.Hasic@methodegermany.com	
Description		□ \$	Alex Genovese		Alexander.Genovese@methode-eur.com	
		<	Alay Snitari	>	Alev Sniteri@methode_eur.com	
Change Assignment	>					Submit

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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

Members Resource	Plan Memb	er Timesheet						
Actions - 🗶 🗔 🐻 - 💭 🏹 🚱 🗐 🔆 -								
Mass Update								
Member	Organization	Access	Project I					
Demo Brand Manager		Project Member 🗸	r					
Demo Leader		Project Member	r					
Kevin Borg		Project Lead	r					
Test Everything		Project Lead	r					

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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 Resource Plan Member Timesheet Actions •							
Member	Organization	Access	Project Role	Com			
	METHODE ELEC.	Project Member	·	Mul			
Alexander Galea		Project Member	PDE Senior Product Design Engineer	Mul			
Allen Carl Bonnici		Project Member	EE Senior Product Electronics Engin	Mul			
Anabel Cutajar		Project Member	LT Let neumatic	Mul			
Angelo Scerri		Project Member	TE Tooling Engineer	Mul			
Anthony Caruana		Project Member	· · · · · ·	Mul			
Elias Moussa		Project Lead		Mul			
Johann Barbara		Project Lead	Livel aunch Manager	Mul			
Joseph Zammit		Project Lead	LM Launch Manager	Mul			
Kevin Borg		Project Member	AM Account Manager	Mul			

Project Role drop down list:

	~			
AM Account Manager	-	IP Intellectual Property	~	
AM Senior Account Manager		IP Senior Intellectual Property		
BPD Business Process and Documentation		LM Launch Manager		
BPD Senior Business Process and Documentation		LM Senior Launch Manager		
CA Cost Analysist		LT Lab Technician		PUPCH Senior Purchasing
CA Senior Cost Analysist		LT Senior Lab Technician		OF Quelity Engineer
CC Change Coordinator		ME Manufacturing Engineer		QE Quality Engineer
CC Casilar Chases Casadiantes		ME Senior Manufacturing Engineer		QE Senior Quality Engineer
Cost Taxes Marshes		MET Metrology		QM Quoting Manager
Core Team Member		MET Senior Metrology		QM Senior Quoting Manager
CS Customer Service		OM Operations Manager		S Sales
CS Senior Customer Service		OM Senior Operations Manager		S Senior Sales
Design Engineer		PDE Product Design Engineer		SE Senior Systems Engineer
EE Product Electronics Engineer		PDE Segier Broduct Design Engineer		SE Systems Engineer
EE Senior Product Electronics Engineer		PDE Senior Floduce Design Engineer		SQE Senior Supplier Quality Engineer
Fin Finance		PPAP Production Approval Process		SQE Supplier Quality Engineer
Fin Senior Finance		PPAP Senior Production Approval Process		TE Sonier Teoling Engineer
Financial Reviewer		Program Manager		TE Senior rooming Engineer
GM General Manager		Project Assessor		TE Tooling Engineer
GM Senior General Manager		Project Lead		www.senior.Warranty.Engineer
ID latella trial Decents	Y	PURCH Purchasing	~	WM Warranty Engineer 🗸 🗸

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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.

Members Resource	Plan Member T	ïmesheet						
Actions - 🗶 🗔	5- 📖 💎 🔮	】 🏾 🔆 🖾						
Save								
Member	Organization	255	Project Role	Comments	Is Core Team Member	Document Approver Role		
	METHODE ELEC.	'ct Member		Multiple Ownership			^	
Alexander Galea		ct Member	PDE Senior Product	Multiple Ownership	FALSE	r		
Allen Carl Bonnici		ct Member	EE Senior Product E	Multiple Ownership	FALSE			
Anabel Cutajar		ct Member	LT Lab Technician	Multiple Ownership	FALSE	LT Senior Lab Technician	١	
Angelo Scerri		ct Member	TE Tooling Engineer	Multiple Ownership	FALSE	٣	J	
Anthony Caruana		ct Member	٣	Multiple Ownership	FALSE		r	
Elias Moussa		ct Lead	r	Multiple Ownership	FALSE			
Johann Barbara		ct 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.

Actions - X	Plan Member T	imesheet III 🔆 -				
Member	Organization	255	Project Role	Comments	Is Core Team Member	D
	METHODE ELEC.	'ct Member		Multiple Ownership		
Alexander Galea		ct Member	PDE Senior Product	Multiple Ownership		٢
Allen Carl Bonnici		ct Member	EE Senior Product E	Multiple Ownership	FALSE	٢
Anabel Cutajar		ct Member	LT Lab Technician	Multiple Ownership	TRUE	Ĺ
Angelo Scerri		ct Member	TE Tooling Engineer	Multiple Ownership	FALSE	٢
Anthony Caruana		ct Member	r	Multiple Ownership	FALSE	٢
			P		P	

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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	ation	Start Date	End Date	Project Role
🗏 🗌 🚀 PRJ-0000001	0.0			
→ ☐ ⑦ 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	ation	Start Date	End Date	Ð	6
🖃 🗌 🎽 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 🖻 🖻 🖻	P
■ → □ ♥ Tool design design reviews and approval	5.0 Days	Apr 14, 2016	May 18, 20	0	0

The documents can have a Document Approver Role defined

Tool manufacturer kick-off)eliv	erabl	les								
Assignees	Ac	tion	ons - 🗔 🔍 - 🐻 🖓 🔇 🔆 -									
Issues												
Collaboration		•	-@	Name 🛆	Title	Rev	Ver	Туре	Actions	Description	Document Approver Role	Doc
Deliverables		0/1		🛅 Tool new doc-179866563089	Tool new doc	0	1	Document	N 🛓 🗞 🎼	Tool new loc	DE Senior Design Engineer	Proc
Dependencies		0/1		Tool spec-159866562277	Tool spec	0	1	Document	N 🛓 🔂 🗔	Tool spec	TE Senior Tooling Engineer	Qua
Properties		0/1		1 Tool spec-199866563448	Tool spec	0	1	Document	🔊 🛓 🕼 🕼	Tool spec	TE Senior Tooling Engineer	/
Routes & Approvals												

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

Members Resource Plan Member Timesheet										
Actions - \mathscr{I} \square										
Member	Organization	Project Role	Comments	Is Core Team Member	Document Approver Role					
	METHODE ELEC. 1ber		Multiple Ownership For Object							
🗌 Johann Barbara	t		Multiple Ownership For Object	FALSE						
		\smile			\checkmark					

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

-1	System Error: #5000001: java.lang.Exception: Project not created from a template !!	Com
	ОК	Multip Multip
	Project Member	Multip

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

🕂 Users	- Users	🎢 All	🎢 One	Clear All	🕲 Reset	📇 Save	Hide Assigned Roles	Highlight Changes	Show Experience
						^			

 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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BARBARA, Johann BONELLO, Laura	
BORG, Kevin DEBONO, David	
MOUSSA, Elias SPITERI, Matthew	
STRINGOS, Evan ZAMMIT, Joseph	

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
 - : assign the users to the given roles automatically, based on previous project role assignment.
 - : 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
 - : discard all changes not saved (icon is highlighted only when there is a change)
 - : 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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Assign all project roles using users Experience



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Remove project roles assignment

The function

/ Clear All

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

			~	
~	^{Role} AM Account Manager ▼	BORG, Kevin AM Account Manager	F	Project Members
0	Role EE Product Electro… ▼			STRINGOS, Evan
~	^{Role} LM Launch Manager ▼	BARBARA, Johann LM Senlor Launch Manager MOUSSA, Elias LM Launch Manager ZAMMIT, Joseph LM Launch Manager	-~	>
0	Role			

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Save project roles assignment Highlight Changes The function highlights all changes not yet saved State : Assign + Active + Review < e (90144... Owner : joseph.zammit Modified : Apr 5, 2016 2:27:59 PM Clear All 🕗 Reset 🕑 Highlight Change 🎾 All 🎢 One 🔒 Save Users Users $\mathbf{\nabla}$ Project Members BORG, Kevin AM Account Manager -BONELLO, Laura DEBONO, Da EE Product Electro... 0 STRINGOS, Evan ZAMMIT, Jos -LM Launch Manag LM Launch Manager 0 ME Manufacturing ... -0 OM Operations Ma... Role SPITERI, Matthew PDE Product Desig... Save The function saves all changes (page Members is updated) Members **Resource Plan** Member Timesheet E Actions -Project Role Member Organization Access David Debono Project Member Elias Moussa Project Member LM Launch Manager Evan Stringos Project Member Johann Barbara Project Lead LM Launch Manager Joseph Zammit Project Lead

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Project Member

Project Member

Project Member

Kevin Borg

Laura Bonello

Matthew Spiteri

Comm

Multip

Multip

Multip

Multip

Multip

Multip

Multip

Multip

AM Account Manager

PDE Product Design Eng...

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

Test 2 Attilio	Activities Estima Gantt Chart Phase Gate View		
Collaboration	Actions - Edit - Type No		
Details			* Create New Table View
Execution	Name	Туре	Id a
Experiments			
Financials	🗕 📄 🎽 Test 2 Attilio	Project S	Assignment View
Folders	→	Task	Effort View
Objectives			Planning View
People	Tool design design reviews and approval from Customer	Task	Task Schedule View
Schedule			
		1	All Jasks

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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%.

Actions • Edit + Type No	0 /	*	🖧 - 🛄	- 8-		70.2	*	
		_		Estimated	_		Project Mem	bers % Allocation
Name	Туре	%	Progress	Duration	End Date	Owner	Kevin BORG	Demo BRAND MANA
			<u> </u>	0.00010		reer crory	\smile	
∃ → □ ♥ 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	1
Deriver 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	
Image: Some state of the st	Task	0.0		0.0 Days	Jul 1, 2015	Test Every		
😑 🗕 🔲 🕑 Project Kick-off MEM - PRF issued at	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

/	Activities Estima Gan	tt Chart Phase Ga	te View						
	Actions • Edit • Type		8 📀 🥒	2	🎝 • 🔒 •	. .	7	70	HH
1	Copy Schedule								
	Deliverables Report		Туре	ld 🔺	Dependency	Ð	٨	State	1
	Add/Remove Dependency	ng reviews	Task	31	24:SS+0.0 d	0		Create	
	 Add Task 	h customer	Task	32	24:SS+0.0 d	0		Create	
	Add Project Assign	ind design reviews at c	Task	33	24:SS+0.0 d	0		Create	
	By User	gn review at customer -	Task	34	24:FS+0.0 d	0		Create	
	By Role	es 'to and from' tool ma	Task	35	24:FF+0.0 d	0		Create	
	Remove/Delete	ign Phase Activities	Task	36		0		Create	
	Open in MS-Project	<u>esiqn</u>	Task	37	<u>24:SS+0.0 d</u>	0		Create	
	🖃 🔶 🏹 🎦 Paint jigs	<u>desiqn</u>	Task	38	<u>24:SS+0.0 d</u>	0		Create	
	🖃 🔶 🗹 🏹 Assembly	line location review	Task	39	<u>40:SS+0.0 d</u>	0		Create	
	🖃 🔶 🗹 🕅 Assembly	line design	Task	40	<u>24:SS+0.0 d</u>	0		Create	
	🖃 🔸 🥅 🏹 PCBA ass	embly line requirement	Task	41	24:SS+0.0 d	0		Create	

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

Activities Estima... Gantt Chart Phase Gate View Edit = Type No U 1 U 🖑 🛲 🙆 🖉 😹 🎭 斗 🛛 🖛 🥅 🤇 Actions Copy Schedule Id
Dependency Ð **Deliverables Report** Туре Add/Remove Dependency g reviews Task 31 24:SS+0.0 d 0 Add Task 32 24:SS+0.0 d 0 h customer Task Add Project 33 24:SS+0.0 d 0 ind design reviews at c Task Assign gn review at customer -34 24:FS+0.0 d 0 Task 35 24:FF+0.0 d es 'to and from' tool ma Task 0 By Role Remove/Delete ign Phase Activities 36 0 Task 37 24:SS+0.0 d 0 Task sign Open in MS-Project 🖃 🔶 🗹 💟 Paint jigs design Task 38 24:SS+0.0 d 0 🖃 🕈 🗹 🔁 Assembly line location review Task 39 40:SS+0.0 d 0 40 24:SS+0.0 d 0 🖃 🗲 🗹 🖾 Assembly line design Task

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.

By Role									
×.					\frown		^		
Task Name	Project Role	Name	Owner	Assignee	Allocation	FTE			
Project Kick-Off by customer - SOW and LOI available	DE Design Engineer	Test Everything Demo Brand Manager Demo Leader			100.0 100.0 100.0				
Project Kick-off MEM - PRF issued and team formed		Test Everything Demo Leader Kevin Borg Demo Brand Manager			100.0 100.0 100.0 100.0				
Kick-off meeting at customer		Test Everything Demo Leader Kevin Borg Demo Brand Manager			100.0 100.0 100.0 100.0				
					Apply	Cancel	ļ		

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

	* Create New Table View	-
	(Allocation View	ME
	Assignment view	
•	Baseline View	
	Effort View	
	Planning View	
	Task Schedule View	
	All Tasks	
	Deleted Tasks	
	Members Task Assignments	
	Tasks	

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

Activities Estima	antt Chart	Phase	e Gate View							
Actions - Edit - Type	N .	° , 🖫	1	🥒 🔜 (🎝 - 🗍 -	🔜 - 📃 🖉 🏹 🔕	· 🛠 🗐			
			Estimated			Project Members % Allocation				
Name	Progress	Total All	Duration	End Date	Owner	MEM Account Manager	MEM Quality Engineer	EVERYTHING Test Project Lead	MEM Product Design Engine	ld 🔺
🖃 🔶 🗌 🕅 Progra	m	0.0 %	2.0 Days	Aug 14,	Test Every					33
🖃 🔶 🗌 🕑 Final d	e:	0.0 %	2.0 Days	Nov 13,	Test Every					34
🖃 🔶 🗌 🕑 Initial q	u	0.0 %	30.0 D	Nov 11,	Test Every					35
= 🗕 📄 🕑 Process I		0.0 %	100.0	Dec 30,	Test Every					36
🗕 🕈 🗹 💟 Lab jiq		100	40.0 D	Oct 7, 20	Test Every		194	45%	53%	37
🖃 🕈 🗹 🗭 <u>Paint ii</u>	<u>a:</u>	300	30.0 D	Sep 23,	Test Every		× 100% 32 22 45 25 65 13 25 25 100 100 100 100 100 100 100 100 100 100	100%	100%	38
🖃 🕈 🗹 🏹 Assem		300	10.0 D	Aug 26,	Test Every		100%	100%	100%	39
🖃 🕈 🗹 🏹 Assem	b	300	75.0 D	Nov 25,	Test Every		100%	100%	100%	40
🖃 🔸 🗌 🕅 PCBA a		0.0 %	40.0 D	Oct 7, 20	Test Every					41
🖃 🗕 🗋 🖗 PCBAI		0.0 %	100.0	Dec 30,	Test Every					42
		0.0.07	400.0	D00	T					\$
Allocation View All Tasks									92 objects	

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

	P-0000110	Members Resource Plan	Membe	er Timesheet								
	Collaboration	Actions - 🥒 🗔 📴 -	Actions - 🥒 🗔 🔚 🖓 🚱 🔚 🔆 -									
	Details	Add Member	ization	Access	Drojoct Polo	Commonts						
	Execution	Add Security Context	Izauon	ALLESS	Project Kole	Comments						
	Experiments	× Delete Access		Project Member	MEM Quality Engineer	Multiple Ownership For Obj						
	Financials	Transfer Assignment		Project Member	MEM Product Design En	Multiple Ownership For Obj						
	Folders	+ Reports		Project Member	MEM Account Manager	Multiple Ownership For Obj						
	Objectives			Project Lead	Project Lead	Multiple Ownership For Obj						
C	People	Define default members										
	Schedure											

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

Step 1: Assignmen	nt Details
⅔-	
Fleids in red Italics are required	/
From	Leader, Demo
То	Borg,Kevin
Types to trai sfer	✓Task Issue ✓Risk
	Next Cancel

The system lists all the objects that match the requirements.

Step 2: Select Types to Transfer From: Lea									
Back 🛛 🐺 💎 🔆 -									
Name 🛆	Туре	Description							
Assembly line design	Task								
Assembly line location review	Task								
Design Activities	Task								
🔽 Lab jigs design	Task								
Paintjigs design	Task								
PFMEA + QCP for each tool and component	Task								
Tool design design reviews and approval from Customer	Task								
Tool manufacture	Task								
Tool manufacturer kick-off	Task								
4 Page 1 of 1 ■ □	Submi	t							
		ノ							

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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

Activities Estima Gantt	Chai							
Actions - Edit - Type Tas	k	- 🔍 🖉	78%					
		 Project Membe	rs Assignment					
Name	Туј	Johann BARBARA	Laura BONELLO	Kevin BORG	David DEBONO	Elias MOUSSA	Matthew SPITERI	Evan STRINGOS
	Tas					Assigned		
🖃 → 🛄 🕅 T-0000599	Tas					Assigned		
	Таз					Assigned		
🖃 🔶 📄 🖄 Mag Cell	Tas					Assigned		
🖃 → 🔲 🖄 T-0000606	Tas					Assigned		
🖃 🗕 💟 Switch comp	Tas				Assigned	Assigned		
🖃 🔶 📄 😰 Tooling Pu	Tas	Completed	Completed	Completed	Completed	Completed	Completed	Completed
🖃 🔶 📄 😰 Product De	Tas	Completed	Completed	Completed	Completed	Completed	Completed	Completed
🖃 🔶 💟 T-00005	Tas	 Completed	Completed	Completed	Completed	Completed	Completed	Completed
🖃 🗕 💟 😰 Quality act	Tas		Assigned			Assigned		
🖃 🔶 💟 Compile	Tas	Assigned				Assigned	Assigned	
🖃 🗕 💟 😰 testing swi	Tas				Assigned			
🖃 🔶 📄 🔁 Gate 3 - Revie	Gat							
Image: Image	Pha K						Assigned	
Filter:Assignment View, Tasks								9

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)

	Activities Estima Gantt	Chart P	hase Ga	ate View		-								
[Actions - Edit - Type Tas	k 🗸	No 1	• 🖷 🕯	iii 🙆 🖉		r 🛄 - 🛙	• - 📰 - 📗	. 🖉 🏹	▦ ☆-				
					Estimated			Project Membe	ers Assignment					
] Name	Туре	%	Progress	Duration	End Date	Owner	Johann BARBARA	Laura BONELLO	Kevin BORG	David DEBONO	Elias MOUSSA	Matthew SPITERI	Evar STR
6	– 🗌 👔 P1	Project S	1.0		221.0	Sep 29,	Joseph Z							
	🖃 🗌 🕑 PLS PHASE 1 - Pro	Phase	10		7.0 Days	Oct 23, 2	Joseph Z							
	🖃 🗌 😰 PLS PHASE 3 - Pro	Phase	1.7		103.0	Apr 1, 20	Joseph Z							
	🖃 🗌 🕑 Product Design	Task	0.0		7.0 Days	Oct 23, 2	Test Every							
	🖃 🗌 🗹 Mag Cell	Task	0.0		1.0 Days	Oct 15, 2	Test Every							
	🖃 🗌 🗹 T-0000599	Task	0.0		1.0 Days	Oct 23, 2	Test Every							
	🖃 🗌 😰 T-0000605	Task	0.0		1.0 Days	Oct 15, 2	Test Every							
	🖃 🗌 😰 T-0000599	Task	0.0		1.0 Days	Oct 15, 2	Test Every							
	🖃 🗌 😰 T-0000600	Task	0.0		1.0 Days	Oct 15, 2	Test Every							
	🖃 🗌 🗹 T-0000599	Task	0.0		1.0 Days	Oct 15, 2	Test Every							
	🖃 🗌 🕑 PLS PHASE 4 - Pro	Phase	2.0		132.0	Jun 9, 2	Joseph Z						Assigned	
	🖃 📄 😰 Gate 4 - Review	Gate	0.0		0.0 Days	Jun 9, 2	Joseph Z							
	🖃 🗌 😰 STA review as	Task	0.0		3.0 Days	Apr 6, 20	Test Every							
	🖃 🔄 🕝 Tool tuning lo	Task	0.0		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 <u>Schedule</u>, 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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1.11.1 Simple Route

Select command **<u>Create Simple Route</u>** 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 **<u>Create Route Wizard</u>** from the Actions menu to create an approval process from wizard.



Set up all the required information in the form

Step 1 of 4: Specify	Details			Step 1 of 4: Specify	Details	
Add Content	Remove Selected			Add Content	Remove Selected	•
Fields in red italics are required	Fields in red italics are required.				1.	
Name	AutoName			Name		AutoName
Template	<u>Clear</u>			Template		<u>Clear</u>
Description				Description	Document upload	
Route Base Purpose	Standard 💌			Route Base Purpose	Approval 🔹	
Scope	All Scope Organization Test 1 Type:Project Space			Scope	 Organization Test 1 Type:Project Sp 	pace
Route Completion Action	Notify Route Owner 💌			Route Completion Action	Notify Route Owner	•
Start Route	● Upon Wizard Completion Manually		-	Start Route	○ Upon Wizard Completion Manually	n
Auto Stop On Rejection	Immediate 💌			Auto Stop On Rejection	Immediate 💌	
			-			
Content				Content		
Name A Conclude Gate 5	Rev	Ver State Condition		Name Conclude Gate 5	Rev	Ver State Condition
documentation	361445584799807	Create		documentation	3614455847	99807 Review
		Carlee				Cancer

Add people or members

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😻 ENOVIA - Mozilla Firefox						X		
Cad-srv-apdev.methode-	Cad-srv-apdev. methode-emea.local: \$111/3 dspace/components/emxRouteWizardAccessMembersFS.jsp?objectIrelation in the state of t							
Step 2 of 4: Select Ro	ute Membe	ers						
Add People Add Men	nber List	Remove Selected	🎇	•				
Name 🗡	Туре	Organization		Scope	Access			
		No Members	;					
	A - Mozilla Fire	fox			_ 0	23		
🛞 cad	srv-apdev. met	hode-emea.local:811	L/3dspace/co	mponents/emxR	outeSelectPro	ojectMer		
Select	People							
*-								
- Na	me	c	Organizati	on				
	davidd	N	IETHODE	ELECTRONIC	cs			
¢	evans	Ν	METHODE	ELECTRONIC	CS			
	Gino vella	N	IETHODE	ELECTRONIC	CS			
	Johann	N N	IETHODE	ELECTRONIC	CS			
	joseph.zan	nmit M	IETHODE	ELECTRONIC	CS			
	Jaura hona	no N	IETHODE	ELECTRONIC	CS			
	matthew.sp	piteri N	NETHODE	ELECTRONIC	CS			
			(Dor	ne Ca	ncel		

Step 2 of 4: Select Route Members

Ad	ld People	Add M	ember Lis	Remove Selected		
	Name 🗸 Type			Organization		
	Zammit, Jo	METHODE ELECTRONICS				

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

Step 3 of 4: Define Route 1	asks	
Actions -		
Title, Action & Order	Assignee & Instructions	Due Date & Time (EDT)
Upload documents Action Approve Order 1	Zammit.Joseph	

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	Owr Mod	ner : josep dified : Mar	h.zammit 15, 2016 :	2:44:16 PM	I	
R-0000257	Properties	Cont	tent /	Access	Discuss	sions H	istory
	≡- 📮	*≁					
	Name	R-000	00257			State	Not Started
	Owner	Josep	h Zammit			Scope	Test 1
	Description	Docu	ment uploa	ad		Template	
	Originated	Mar 1	5, 2016			Route Bas Purpose	e Approval
	Route Completion Action	Notify	Route Ov	/ner		Auto Stop On Rejection	Immediate
1	Tasks (Grap	hical)	Tasks				\smile
	R-0000257 :	Tasks (0	Graphical)			
	≫~-						
	4	->	App <u>Upload d</u> Joseph Mar 16	orove ocuments i Zammit 6, 2016];	- 19	

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



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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.

Actions • Edit • 🥒 😹 🌉 • 🗐 •	Actions - Edit - 🖉 🛃 🖏 -	-	o	- 🔍
Name 🔺	Name 🔺	٢		Drop
🗏 🗌 📸 PDPLS - Template	🖃 🗔 🙀 P-0000110			(#)
🛨 🗖 🗁 01_Form Team	🕀 🗖 🗁 01_Form Team			
🗉 🔲 🗁 02_Phase Sign Off	🕀 🕞 🗁 02_Phase Sign Off			
🕀 🔄 🗁 03_Open Issues Deck	🕀 🗋 🗁 03_Open Issues Deck			()
🗉 🔲 🗁 04_Customer Input Requirement	🕀 🖂 🗁 04_Customer Input Require	m		(#)
🕀 🔲 🗁 05_Program Budget	🗉 🗖 🗁 05_Program Budget			(4)
🗉 🔄 🗁 06_Program Timing	🕀 🗖 🗁 06_Program Timing			(4)
🕀 🔄 🗁 07_Product Engineering	+			(4)
🕀 🔄 🗁 08_Testing and Validation	+ D 200 Testing and Validation			(4 5)
🕀 🔄 🗁 09_Quality Planning				CRD

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.

Inherit Access ●Yes ○No	<u> </u> <u>i</u> <u>i</u> <u>i</u> .		
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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

Drop Images here Project Space (ailgate 207542 MEM Part Number (8514 3 b	Stat Owr Mod	e: A ner: Jo lified:	lssign ← Dhann Ba Feb 27,	Ac arbara 2017	tive + Review 4:18:28 PM		
LM Ford C519 Tailgate 20	Actions - Edit -	•	-	.	V	27 🕱	≈.	
Collaboration	□ Name ▲	٢		Drop	Drag	Туре	Document Type	Document Approver
Details		. · ·	-	1000		Device t Canada		
Execution						Project Space		
Experiments	O1_Form Team			4	=	Workspace F		
Financials	🖃 🔲 🗁 02_Phase Sign Off			4	=	Workspace F		
Folders	🖃 🔲 🗁 Gate 1				≡	Workspace F		
Objectives	🖃 🗖 🛅 DOC-0001603		0/1		≡	Document	Phase Sign Off	
People	🖃 🗖 Gate 1 Signed.PD					Document	Phase Sign Off	
Schedule	🖃 🔲 🗁 Gate 2					Workspace F		
Issues	🖃 🗖 🗁 Gate 3				≡	Workspace F		
Members and Roles	🖃 🗋 🗁 Gate 4			4	=	Workspace F		
	🖃 🗖 Gate 5			4	≡	Workspace F		
	Og_ 03_Open Issues Deck			(+)	=	Workspace F		
	D D 04_Customer Input Requi			(+)	=	Workspace F		

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"

	Mod	lified	: Feb 27, 2017 4:18:28 PM		
	Î	-	📑 🖓 🔄 💭 🗐	≈-	
	٢		* Create New Table View	Document Type	Documer
ailgate 20754			Content View		
am			Member Access View		
ign Off		<	Role Access View	\triangleright	
			Markenaca E		

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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.

Actions 🗸 Edit 🗸 🥒	- Ex- 🗐 -		07]	1 🛠	. ▲				
					Project Role Access				
Name ▲	Туре	Owner	Default Us	Inherit	AM Account Manage	CA Cost Analysist	CC Change Coordina	CS Customer Servic	Fin Finance
🖃 🗌 🎓 LM Ford C519 Tailg:	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 (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
Discussion	Workspace F	🖨 Johann B	Read	Yes	Read	Read	Read	Read	Read
🖃 🔲 🗁 04_Customer Inj	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

Actions - Edit - 🗶 🛃 🛃 - 🗐 - 🔛 -	📃 🖉 🏹 🧮 🔆 -
Mass Update	×

						Project Role Access		
	Name .	Туре	Owner	Default Us	Inherit	AM Account Manage	CA Cost Analysist	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	Add Add Remove	Read	Read
	🖃 🗖 🗁 Gate 3	Workspace F	🕼 Johann B	Read	Yes	None	Read	Read
	🖃 🗋 🗁 Gate 4	Workspace F	🖨 Johann B	Read	Yes	Read Write	Read	Read
	🖃 🗋 🗁 Gate 5	Workspace F	4 Johann B	Read	Yes	Remove	Read	Read
		Workenson E	A Jahann D	Dood	Vac	Dood	Dood	Dood

- 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.

Drop images here M RENAULT (M	e-Shifter 0000224 RENAUL e (2147 3b Lever/km	T e-shifter iob / Pommeau Lev	State : Assign + Active + Rev Owner : David Debono Modified : Mar 6, 2017 10:54:06 AM	iew							
LM RENAULT e-Shifter 000	Members Resource Plan Member Timesheet										
Collaboration											
Details	Add Member	rganization	Access	Project Role							
Execution	Add Security Context	ETHODE ELEC	Project Member								
Experiments	Transfer Assignment		Project Member	AM Account Manager							
Financials	Reports		Project Member	EE Senior Product Electronics Engineer							
Folders		-	Project Member	LT Senior Lab Technician							
Objectives	members		Project Member	TE Tooling Engineer							
People	Update Folder Access		Project Member	ME Senior Manufacturing Engineer							
Schedule	🗌 Attilio Fumagalli		Project Lead								
Issues	Charles Zammit		Project Member	TE Tooling Engineer							
Members and Roles	Christian Spiteri		Project Member	EE Product Electronics Engineer							
	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"

Tool manufacturer kick-off)eli	ivera	abl	les										
Assignees Issues		ctio	ns .		🗖 🔍 - 🖪 - 🖉 🖓	' 💽 %	-								
Collaboration		6	•	÷	Name 🛆	Title	Rev	Ver	Туре	Actions	Description	Document Approver Role	Document Type	State	
Deliverables			14		P DOC 0000162	Tool	0	4	Desument	2	Teelonee	TE Senior Tooling	Quality	Delegend	-
Dependencies		0			000-000103	spec	0	1	Document		Tool spec	Engineer	Engineering	Released	
Efforts		0)/1		Tool new doc-1052164694606	Tool new doc	0	1	Document	2	Tool new doc	DE Senior Design Engineer	Product Engineering	Released	L.D
Properties															
Questions															
Risks															

Project: deliverables definition for task "Tool manufacturer kick-off"

Deliverables													
	8	÷	Name 🛆	Title	Rev	Ver	Туре	Actions	Description	Document Approver Role	Document Type	State	
	0/1		Tool new doc-173901735874	Tool new doc	0	1	Document	a 🛓 🗞	Tool new doc	DE Senior Design Engineer	Product Engineering	Private	ф
	0/1		Tool spec-153901735452	Tool spec	0	1	Document	a 🛓 🕏	Tool spec	TE Senior Tooling Engineer	Quality Engineering	Private	ц.

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

Actions - Actions -								
	Name 👌	Title	Rev	Ver	Туре	,		
0/1	Tool new doc-173901735874	Tool new doc	0	1	Document			
0/1	Tool spec-153901735452	Tool spec	0	1	Document			

Actions -	
 Create New 	
* Document	
🖙 Upload Files	
Add Existing	
Remove	
📩 Download	
Checkout	
Add to Folder	

Version	7	Date:	28-November-20)17
Status	Released			55

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

Step 2 of 2: Upload Files
×-
File Format
Browse N file selected. generic V
Browse No file selected.

Version	7	7 Date:			
Status	Released			56	

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

Component manufacturer k Assignees	Ac	eliver	ables		7 🔮 🔆 -		
Issues		8	•	Name 🛆	Title	Rev	Ve
Collaboration		0/1	(DOC-0000199	DOC-0000199	0	1
Deliverables							
Dependencies							
Properties							
Routes & Approvals							

1.13.2 Upload files

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

Component manufacturer	Deliverables
Assignees	Actions 🗸
Issues	Create New
Collaboration	Upload Files
Deliverables	Add Existing

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.

Upload Files To Individual Document	S	
*-		
File Format	Title	Description
GL codes explanation.pptx	upload file tes	test 1

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

Component manufacturer k Assignees	Ac	Deliverables Actions \bullet Image: Construction of the second seco								
Issues		8	-	Name 🛆	Title	Rev	Ver	Туре	Actions	Description
Collaboration		0/1		DOC-0000199	DOC-0000199	0	1	Document	N 1 6 G	
Deliverables		0/1		DOC-0000200	upload file test	0	1	Document		test 1
Dependencies										
Properties										
Routes & Approvals										

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.

Component manufacturer	Deliverables						
K	Ac	tions 🗸		ि - 🔂 🖓 (🗟 🔆 -		
Issues			-	Name 🛆	Title		
Collaboration		0/1		DOC-0000199	DOC-0000199		
Deliverables		0/1		DOC-0000200	upload file test		
Dependencies							
Properties							
Routes & Approvals							

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.

D	Deliverables									
Acti	Actions 🚛 🛄 🗸 🔄 💎 🤮 🔆 .									
	8	•	Name 🛆	Title	Rev	Ver	Туре	Actions	Description	
	0/1	•	Tool new doc-333468774878	Tool new doc	0	1	Document		Tool new do	
	0/1	•	Tool spec-313468774613	Tool spec	0	3	Document	a 🛓 🗞 🖟	Tool spec updated	

<u>Step 1</u> 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



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Step 2 the user has to update the file, and save it on the file system

<u>Step 3</u> the user uploads the new attachment using the icon browse and select the file updated

Update Files	
Current File Updated File Format	Comments
HPCamDrv.log Browse No file selected. generic v	New version
	Done Cancel

<u>Step 4</u> 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 afterwords, 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

, a new window opens that ask the user to

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.

🕘 ENOVIA - Mozilla Firefox						
cad-srv-apdev.metho	de-emea.local:9090/3dspace/components/emxSubscription					
Tool new doc-173901735874 : Subscription Options						
**						
Subscription Events	Content Modified Content Modified Content Modified Content Checkout Document Deleted Document Modified Document Revised Route Started New Discussion					
	Done Cancel					

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

<u>Step 1</u> Select the document

<u>Step 2</u> 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.

	RIENCE ENOVIA Collabo	pration and Approvals
VA		
DOC-0000200 test 1 upload file test Document (0)	State : Private ← In W Owner : joseph.zammit Mostified : Mar 15, 2016 5	i:54:31 PM
upload file test	(≡-) ‰-	
Files	Edit Details	-0000200
File Versions	📥 Download	
Approvals	🗟 Checkout	iment
Revisions	🕞 Upload/Check In	vice Production
Issues	Revise	ad file test
Routes	Revise With Files	prk
Discussions	Subscribe	ph Zammit
Retention Schedules	× Delete This Version	15, 2016
Lifecycle	Push Subscription	15, 2016
Multiple Ownership Access	× Delete All Versions	ment Release
History	Document Approver Role	
Where Used	Access Type	Inherited

Edit Details

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

DOC-0000185 Tool spec Tool spec Document (0)	State : Private + Owner : joseph.zamm Modified : 1/27/2016 1	In Work → Frozen it 2:29:28 PM					
Tool spec	DOC-0000185 : Edit Details						
Files							
File Versions		Flakis In red Balles are required					
Approvals	Name	DOC-0000185					
Revisions	Revision	0					
Issues	Туре	Document					
Routes	Vault	eService Production					
Discussions	Title	Tool spec					
Retention Schedules		Tool spec					
Lifecycle	Description						
Multiple Ownership Access	State	In Work					
History	Owner	losenh Zammit Clear					
Where Used	Originated	Jan 27, 2016 12:29:24 PM					
Classification	Modified	Jan 27, 2016 12:29:28 PM					
Referenced By	Policy	Document Release 🗸					
	Document Approver Role						
	Document Type	· · · ·					
	Classification Path(s)						

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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.

<u>Revise</u>

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

<u>Subscribe</u>

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 od a document for a user

Delete all versions

Purge all the versions of a document

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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)

				_					
PDPLS 1	Projec 21459 Delive	t PDPLS 1 With rables	Star Own Mod	e : Create non : Johann lified : Apr 5, 2	→ Assign				
PDPLS 1	Properties	Preferences	Lifecycle	History	Related Projects	Images			
Details	Lifecycle								
Execution	PDPLS 1 rev 21459839707420: Lifecucle								
Experiments									
Folders			6						
People	II Promote	Drea	ate	Assian	Active	Review	Complete Archive		
Schedule	The Demote			noorgn	7,0470				
Issues									
Members and Roles									
	Tasks/Signat	ures Approva	s						
	🔹 Name	Appro	over	Title	Approval Status	Approval/Due Date	Comments/Instructions		

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.

Notice:	
Missing product connected as	Governed Items
	ОК
Assian Active	Review

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

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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.

			_	_							
Dron Images here PDPLS 1	Project PDPLS 1 With 21459 Deliverables		Assign Maer odified	Active ; Johann d : Apr 5, 2016 9:3	→ Review A6:15 AM	I					
PDPLS 1	PDPLS 1 Gantt Chart Phase Gate View										
Details	Actions - Edit - Type Tas	k 🗸 N	lo 1	✓ # #	💿 🥒 🖁	l 🎝 - 🔒	-	. - ==-		27	≣ ‰-
Execution											Constraint
Experiments	Name	Туре	ld 🔺	Dependency	Ð	5		State	%	Progress	Constraint Ty
Folders	E DPLS 1	Project S				0		Active	0.0		As Soon As P
People	🛨 🔶 📄 💟 Customer Miles	Phase	1		0	0		Assign	0.0		As Soon As P
Issues	🕀 🔶 📄 🕑 PLS PHASE 1 - F	Phase	11		0	0	1	Assign	0.0		As Soon As P
Members and Roles	🗄 🔶 📄 🗭 PLS PHASE 2 - F	Phase	88		0	0	Ĺ	Assign	0.0		As Soon As P
	🕀 🔶 📄 🗭 PLS PHASE 3 - F	Phase	119		0	0	ł	Assign	0.0		As Soon As P
	🗈 🔶 📄 🕑 PLS PHASE 4 - F	Phase	161		0	0	1	Assign	0.0		As Soon As P
	🕀 🔶 📄 🏹 PLS PHASE 5 - F	Phase	183		0	0		Assign	0.0		As Soon As P
	🛨 🗕 📄 🕑 Sample deliverie	Phase	189		0	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																								
New Resource Lo 🕅 🔆 -																								
Report Period	Report Period									^														
FIOID. JUII 28	, 2015												10.J	an z, z	010									_
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	De 6, 20
& 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
<																							Can	> ×
																							Can	

Step 1 Project Lead or project owner selects the <u>People</u> command, that lists all the members, Step 2 Select the necessary members

P-0000110	Members Resource	Plan Memt
Collaboration	Actions -	R- 📃 🏹
Details		
Execution	Member	Organization
Experiments	Demo Brand Manager	
Financials	Demo Leader	
Folders	Kevin Borg	
Objectives	Test Everything	
People		
Ontradula		

Step 3 from the Actions menu selects the appropriate command,

Test 1	Members Resource Pla	Members Resource Plan
Collaboration	Actions -	Actions - 🥒 🗔 -
Details	Add Member	Add Member
Execution	× Delete Access	Add Security Context X Delete Access
Experiments	Transfer Assignment	Transfer Assignment
Financials	✓ Reports	• Reports
Folders	Resource Loading	Resource Loading Report
Objectives	Labor Report By Person	Labor Report By Person
People		Define default members
Schedule	Assigned issues Report	

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Step 4 defines the period related to the report

Resource Loading	Period Selection				
⅔-					
					^
Weekly					
 Monthly 					
Ouarterly					
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 Load	ling Re	eport												٧	Veekly	v
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	C 1 2
Rand Manager, Demo	0	0	0	0	0	0	0,2	0	0	0	0	0	0	0	0	0
Ceader, Demo	0	0	0	0	0	0	1,4	3	3	3	3	3	2,6	2	2,8	4
Everything, Test	1,4	0	0	0	0	0	0,4	1	1	1	1	1	0,6	0	0	0
<																> `
															Cance	el

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

€-						
Task Name	Project Role	Name	Owner	Assignee	Allocation	FTE
roject Kick-Off by ustomer - SOW and Ol available	DE Design Engineer	Test Everything Demo Brand Manager Demo Leader	•		100.0 100.0 100.0	
roject Kick-off MEM - RF issued and team ormed		Test Everything Derno Leader Kevin Borg Derno Brand Manager			100.0 100.0 100.0 100.0	
ick-off meeting at ustomer		Test Everything Demo Leader Kevin Borg Demo Brand Manager			100.0 100.0 100.0 100.0	

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Status	Released			66

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	e Loading Report										Weekly]
New Res	ource Lo 🖇	A -										
Report Per	riod											^
From : No	v 1, 2015			т	o: Jan 2, 1	2016						
Person	Project	Schedule Task	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	
	2 P-0000110 2 P-0000110	Manufacturing Approval	0 0	0 0	0 0	0 0	0 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 componen	t 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 progaming 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	~
											Cancel]

Version	7	Date: 28-November-			
Status	Released			67	

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.

P-0000110	Activities Estima Ga	ntt Chart Phase Gate View		
Collaboration	Actions Edit Type	No 🐙 🚟 🙆		. - 🗋
Details	Copy Schedule		- 000 0	
Execution	Deliverables Report		Туре	ld 🔺 Dep
Experiments	Add/Remove Dependency		Project S	
Financials	A Add Tests	-	n tojeci o	
Folders	 Add Task 	itones	Phase	1
Objectives	Add Project	Program Release and Concep	Phase	11
People	 Assign 	Production Development	Phase	48
Schedule	Remove/Delete	Production Launch	Phase	92
	Open in MS-Project	Release to production	Phase	114
	🕀 🗕 🖂 🖄 Sample delive	eries	Phase	119

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

De	liverables Report										
	📪 · 📾 · 📄 📬 🏹 🚱 🧱 🎉 ·										
Sch	edule Task Details	Task ID	Schedule Task De	etails			Deliver	ables			
Na	ne	ld	Est. End Date	State	%	Assignee	Туре	Name	Files	Rev	Ver
	Gate 1 Manufacturing Engi	28	Sep 23, 2015	Assign	0.0	Test E					^
	Initial quotes 'to and from' t	35	Nov 11, 2015	Assign	0.0	Test E					
	Kick-off meeting at custom	19	Jul 1, 2015	Active	20.0	Test E	Do	•D	[Linea+Trasporto	0	[1]
	Lab jigs design	37	Oct 7, 2015	Assign	0.0	Demo					
	Manage the Project Tasks	12	Nov 11, 2016	Assign	0.0	Demo					
	Methode recieves all desig	21	Aug 12, 2015	Assign	0.0	Demo	Do	₽ ` D	[a.txt]	0	[1]
	P-0000110		Mar 7, 2017	Active	0.1						
٦	Paint jigs design	38	Sep 23, 2015	Assign	0.0	Demo					
	PCBA assembly line requir	41	Oct 7, 2015	Assign	0.0	Demo					~
<	>	<									>
											38 objects

.

Ð

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.

Version	7	Date:	017	
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Activities Estima Gantt	Chart Pl	hase (ate View			
Actions			iii 👔 🥖	🏯 👼 🗍	- -	. • •
Name	Туре	ld 🔺	Dependency	Ð	D	5
🗏 🗌 👔 P1	Project S				0	5 6 6 6 (2
■ → 🗌 🗭 PLS PHASE 1 - F	Phase	1		0	0	0
🖃 🔶 📄 💙 Project Kick-C	Task	2		0	0	0
🖃 🔶 🛄 🕅 Project Kick-o	Task	3	2:FS+0.0 d	2 📑 🎦	0	0
🕀 🗕 🗌 💙 Quality Activi	Task	4		0	0	0
🖃 🗕 🗌 🗭 Gate 1 - Review	Gate	6	4:FS+0.0 d	0	0	0
🖃 🗕 🗌 💟 PLS PHASE 2 - F	Phase	7		0	0	0
🖃 🗕 📄 🗭 Switch comp	Task	8		0	0	0
🖃 🔶 📄 💆 Make-Buy (Task	9		0	0	1 🦢

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Status	Released			69

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.

	Test 1	Experiments		
	Collaboration	🔟 🐻 🖻 🥒 📃 ⁵	7 💥	*-
	Details			
	Execution	Name 🔺	Diff.	Туре
ς	Experiments	🖃 💽 🏹 Test 1	<u>0.0</u>	Project Space
	Financiais			

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?

ОК	Cancel

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

Test 1	Experiments							
Collaboration	🛛 🖾 🖻 🥒 🔜 ⁵	7 %	A-					
Details			3		Estimated			
Execution	Name 🔺	Diff.	Туре	State	Duration	Start Date	End Date	Descrip
Experiments	🗖 🔊 🏹 Test 1	0.0	Project Space	Crea	te 571.25	Oct 23, 2015	Feb 12, 2018	test 1 la
Financials	□ → @ JK Exp-0000158	0.0	Experiment	Creat	te 571.25	Oct 23, 2015	Feb 12, 2018	test 1 la
Folders		0.0	Сурентен	orea	011.20	00120,2010	10012,2010	10-31 1 10
Objectives		4						
People								
Schedule	Structure Gantt Chart							
Issues	Actions - Edit - Type Tasl	k	▼ No 1 ▼ 4		- 💿 🥒 📕	.	- 🕺 🖓	
Members and Roles							Constraint	
	Name	₹2	Туре	ld	Dependency	State	Constraint Ty	pe
	🖃 🔶 📄 💙 Sample deliveri	Z.	Phase	160		Create	As Soon As Po	ossible
	🖃 🔶 🔲 🗭 PT2-0-Serie -	~	Task	177		Create	As Soon As Po	ossible
	🖃 🗕 🕅 😭 Methode int	1	Task	182	170:FS+0.0 d	Create	As Soon As Po	ossible
	🖃 🗕 🕅 💆 Customer a	~	Task	181	180:FS+0.0 d	Create	As Soon As Po	ossible
	🖃 🗕 🗐 🗹 Send meas	~	Task	180	179:FS+0.0 d	Create	As Soon As Po	ossible

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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



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opens the same task in the master project

Structure Gantt Chart									
Actions - Edit - Type	No v 1 v	🖳 🛣 😣 🖉			- 📃 🏹	**			
						Constraint		Estimated	
Name	-	🖄 Tjpe	ld 🔺	Dependency	State	Constraint Type	Constraint Date	Duration	Start Date
🖃 🗌 <u>४</u> Exp-0000126		Experiment			Create	As Soon As Pos	Jul 21, 2015	443.0 Days	Jul 21, 20
🛨 🗕 🗋 Customer Milestor	es	B Phase	1		Create	As Soon As Pos		393.0 Days	Jul 21, 20
🖃 🗕 🗋 🖄 PLS PHASE 1 - Pro	ogram 🔿	Phase	11		Create	As Soon As Pos		360.0 Days	Jul 21, 20
🕀 🗕 🗋 🏹 Manage the Pro	ject Ti 👳	a Task	12		Create	As Soon As Pos		360.0 Days	Jul 21, 20
■ → □ Project Kick-Off I	oy cust _🚖	Task	17		Create	As Soon As Pos		0.0 Days	Jul 21, 20
	1EM - F 🚕	Task	18	17:FS+0.0 d	Create	As Soon As Pos		5.0 Days	Jul 21, 20
→ □ ② Kick-off meeting	at cust _י	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	Phas 🚽	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				Туре	ld 🔺	Dependency			
🖃 🕅 🎢 Test 1									
🗕 🗕 📄 🗳 Customer Miles	stones			Phase	1				
→ □ ♥ Supplier Nomination					2	\frown			
→ ■ ② Design Freeze					(47:FS+0.0 d			
🖃 🗕 🗐 🍘 Parts from 1s	t Tooling			Task	4	108:FS+0.0 120:FS+0.0 0			
Design Freeze : Work Breakdown Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Design Freeze : Work Breakdown Structure Filter: Task Schedule View, Tasks Image: Structure - Mozilla Firefox Design Freeze : Work Breakdown Structure Filter: Task Schedule View, Tasks Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox Image: Structure - Mozilla Firefox <p< th=""></p<>									
🗖 Name	Type <u>Id</u> ▲	Dependency	Ð	D	5				
Design Freeze	Task	25:SS+35.0 d	0	0	0				

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Status	Released			72
To modify the details of a task, select it then click on the 🥒 icon to activate the edit mode.

Actions • Edit • Type Task No 1 • Image: Constraint of the second sec									
🗇 Name	Туре	ld 🖌	Dependency	Ð	D	5		State	%
- 🕅 🚀 Test 1	Project S				0	0		Create	0.0
→ □ ♀ □ ♀ □ ♀ □ ♀ □ ♀ □ ♀ □ ♀ □ ♀ □ ♀ □	Phase	1	r	0	0	0		Create	0.0
► → 🗐 🕄 Supplier Nomination	Task	2	,	0	0	0		Create	0.0
→ ♥ ♥ Design Freeze	Task	3	<u>47:FS+0.0 d</u>	0	0	0	E.	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.



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

		Structure Gantt Chart					
		Actions - Edit - Type Ta	sk 🔹 No 1 💌 🛓	-	🛛 🗶 🖪		- 📑 - 🔜 🏹
/		Copy Schedule					
		Copy To Selected Task					
	C	Task Above		72	Туре	ld	Dependency
	"	Sub Task			Project Space		Ι
	٣	Project Above	tones		Phase	1	٢
	٢	Sub Project Add/Remove Dependency	e		Task	3	47:FS+0.0 d
		Delete Selected	t Tooling		Task	4	108:FS+0.0 d,120:F
	~	Remove Project	ination		Task	2	٢
	P	🖃 🔶 🔲 🖓 kanufacturin	g Approval		Task	9	146:FS+0.0 d
	٣						٣

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1.17.3 Compare and Sync

Test 1	Experiments					
Collaboration		7 🕺	A-			
Details			-		Estimated	
Execution	Name 🔺	Diff.	Туре	State	Duration	Start D
Experiments	🖃 🔊 🏹 Test 1	0.0	Project Space	Create	571.25	Oct 23
Financials	□ • • IV Exp_0000158	0.0	Exporimont	Croate	571.25	Oct 22
Folders		0.0	стреншени	Create		00123,
Objectives						
People						
Schedule	Structure Gantt Chart					
Issues		sk	▼ No 1 ▼		👩 🖌 🖉	
Members and Roles	Mass Update	•				
	Name	72	Туре	ld [Dependency	
	— → □ 🖓 Sample deliver	i 😞	Phase	160		
	T2-0-Serie		Task	177		

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

Structure Gantt Cha	Structure Gantt Chart								
	7 😪 🔆 -								
									Save Reset
				Estimated					
Name	Туре	ld	Dependency	Duration	Start Date	Name	Туре	ld	Dependency
🖃 👱 Exp-0000126	Experi			443.0 Days	Jul 21, 2015	PDPLS 4	Projec		^
🖃 🔶 🔲 🗹 Customer Mil	esto Phase	1		393.0 Days	Jul 21, 2015	Customer Milestones	Phase	1	
🖃 🔸 📄 💆 Supplier N	omir Milest	2		0.0 Days	Jul 21, 2015	Supplier Nomination	Milest	2	
🖃 🔶 📄 🙋 Design Fre	eeze 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 Ch	eck 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
🖃 🔸 🔲 😰 Manufactu	ring Milest	9	118:FS+0.0 d	0.0 Days	Oct 12, 2016	Manufacturing Approval	Milest	9	119:FS+0.0 a
🖃 🔸 📄 😰 Start of Ag	reen Milest	10		0.0 Days	Jul 21, 2015	Start of Agreement	Milest	10	~
<					>	<		159 o	> bjects, 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

P-0000110	Activities Estima Gantt Chart Phase Ga	ate View		
Collaboration				
Details	Jul 1, 2015 - Dec 28, 2016	Jul 1, 2015 - Nov 11, 2016	Gate 1	Aug 13, 2015 - Jul 19, 2016
Execution				
Experiments				
Financials	Customer Milestones	PLS PHASE 1 - Program Release and Concept Development		PLS PHASE 3 - Production Development
Folders			~	
Objectives	Milestones		2	
People	Supplier Nomination Design Freeze - Mechanical & Electrical		a 1	
Schedule	 Parts from 1st Tooling - FOT's (RDV0/VFF) 			
	◆ Vehicle Check (VC/VFF) LOT B-Serie			
	♦ Plant Trial (PT/PVS/BMG/C-Serie) 1			
	Plant Trial (PT/0-Serie/Note 3/D-Serie/PPAP1) 2			
	PSW (KO/Note 1/PPAP3)			
	 Manufacturing Approval 			
	Start of Agreement - SOP (Mass Production)			

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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).

 Collaboration and Approvals 	PowerView										
Home	Tasks Issues Approva	l Tas	ks Ap	proval Issue	es Projec	ts My	Calendar Messages				
Home RFQ User	Tasks Filer:Assigned Gates										
Home Engineering User	🖉 🗔 🖓 🔜 🖬		🖉 🏹	' 🚷 🏢	¦ ‰∙						
Home Change	Name	۵	Slip Days	Ð	5	State	% Complete	Project	Est Start		
Management User	Gate 1 - Review and Sign off		0	0	0	Create		P1	Oct 15, 2015		
Issues Summary			0	0	0	oreate			00113,2013		
Shortcuts	Gate 2 - Review and Sign off		47	0	0	Create		Test Export	Feb 11, 2016		
Collections											
Subscriptions											
r Team											

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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



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Status	Released			77

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.

Checklists Deliverables					
Action 🗸 🧸 🌆 🗸]- 📑- 📰 🦉 🖉	7 寓 🔆			
Mass Update 🗸 🗸					
Name	Responsible	Description 🔺	Response Type	Response	Comm
		Reviewed and signed oil (Co	N/A 12340	IN/A	
E → Cl_Submitted	r	Submitted RFQ package avai	N/A 1 2 3 4 5	3	3
📕 🗕 🛨 📑 CH_05. Deviatio		05. Deviation checklist			
¯ → 🗌 🔞 Cl_Customer	r	Customer Terms & Conditio	N/A 1 2 3 4 5	4	4
🗧 🗕 📄 📴 CH_06. Purchas		06. Purchase Orders			
- → CI_NRE orde	r	NRE order issued and relea	N/A 1 2 3 4 5	1 ^	r
🗖 🕳 🛨 📴 CH_07. Program		07. Program Funding Release		2	
r → □ 🗞 Cl_Program F	r	Program Release Customer	N/A 1 2 3 4 5	4	r
r	P	Program Release Internal M	N/A 1 2 3 4 5	5 🗸	٣
🗖 🗕 🗕 📄 CH_08. Design		08. Design Goals understood?			
🗐 🗕 🗕 🥅 🕅 Cl. Design Inj	r	Design Input Data Checklist i	N/A 1 2 3 4 5	r	r

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



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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Act	ivities	Estima Gant	tt Chart Ph	ase Gate View			
		Oct 15, 20	15 - Oct 23, 201	5		Gate 1	Oct 15, 2015 - Oct 15, 2015
ļ	PHA	ASE 1 - Program Re	elease and Con	cept Developm	ent	\diamond	PLS PHASE 2 - Prototype Development
						🕺 🖄	
						<i>a</i> П	
Legen	d				_		
Legend				Actual Finish Date	Overall Ra	ting	
1	Create	Gate 1 - Review and Sign off	Oct 15, 2015	Oct 15, 2015	1		
2	Create	Gate 2 - Review and Sign off	Oct 15, 2015		0		
3	Create	Gate 3 - Review and Sign off	Mar 3, 2016		0		
4	Create	Gate 4 - Review and Sign off	Dec 23, 2015		0		

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

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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 Clear		
Review		<u>Clear</u>		
Complete		Not allowed for last state		
		Apply Done 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	•	∎¥ +∎	7	.	•	2 ⁸
□ Name ▲	Туре	Revision	0	Title	FromContext	Description
☐ Y Approve	Decision	14334			General Decision	Phase 1 approved
< >>	٢		~			د 1 objec

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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 standard structure	o create	project with a
End			
Constraints			

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

Drop Images here PDPLS - Templat	tones State : Create 153563 Owner : laura.bonello te PDPLS Modified : Jan 15, 2016	Assign 9:33:35 PM		<売
Customer Milestones	Bookmarks Decisions	Meetings		
Assignees	* × 🖻 🖉 🗔 🖁	· . · .	- 📃 🖉 🏹	3 📰
Issues		Deletionatio	Description	
Collaboration	Name 🗸	Relationship	Description	Mee
Deliverables			No Objects Fou	nd
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.

P-0000110	Bookmarks Decisio	ons Discussions Meetings								
Collaboration	* × ∕ ⊒ .8		- 🛠 🗐 🚱 -							
Details		Relationshin Tuna	0	Chata	Tania (fam(a)	Description	Masting Data	Cto at Time	Duratian in Minutan	0 atlana
Execution		Relationship Type	Owner	State	ropic item(s)	Description	meeting Date	Start Time	Duration in minutes	Actions
Experiments		Meeting	Test Everything	Create		Review	Apr 3, 2012	8:30 AM	60.0	t de la companya de l
Financials	🔳 😁 M-0000101	Meeting	Test Everything	Create		Review	Oct 4, 2012	8:30 AM	60.0	E
Folders		Meeting	Test Everything	Create		Review	May 2, 2012	8:30 AM	60.0	Ē
Objectives	🗄 🗌 🐸 M-0000103	Meeting	Test Everythir Test Eve	rything _{eate}		Review	May 4, 2012	8:30 AM	60.0	E
People	🗄 🗌 🐸 M-0000104	Meeting	Test Everything	Create		Review	May 15, 2012	8:30 AM	60.0	E
Schedule	🕀 🗌 🏙 M-0000105	Meeting	Test Everything	Create		Review	May 24, 2012	8:30 AM	60.0	Ē
	📧 🔤 🏙 M-0000106	Meeting	Test Everything	Create		Review	Jul 4, 2012	8:30 AM	60.0	Ē
	€ 🔤 🏙 M-0000107	Meeting	Test Everything	Create		Review	Jul 31, 2012	8:30 AM	60.0	E
	📧 🗌 🏙 M-0000108	Meeting	Test Everything	Create		Review	Sep 6, 2012	8:30 AM	60.0	Ē
	🗔 🏙 M-0000109	Meeting	Test Everything	Create		Review	Oct 5, 2012	8:30 AM	60.0	E
	📧 🗌 🏙 M-0000110	Meeting	Test Everything	Create		Review	Oct 11, 2012	8:30 AM	60.0	Ē
	. 🗑 😁 M-0000111	Meeting	Test Everything	Create		Review	Oct 25, 2012	8:30 AM	60.0	e
	€ 🗌 🐸 M-0000112	Meeting	Test Everything	Create		Review	Nov 22, 2012	8:30 AM	60.0	e
	🗌 🐸 M-0000113	Meeting	Test Everything	Create		Review	Jan 9, 2013	8:30 AM	60.0	E
	€ 🗌 👑 M-0000114	Meeting	Test Everything	Create		Review	Aug 15, 2013	8:30 AM	60.0	Ē

3.1.1 Creation

The following are mandatory fields during the creation of a meeting

- Subject
- Meeting Date
- Start time
- Duration

P-0000110 Create Mee	ting	
🚱 🔆 -		
Fields in red Italics are required		^
Name		
	Autol	Name
Туре		
Meeting		
Subject		
Meeting Location		
Context		
P-0000110		
Description		
Meeting Date		
Start Time		
8:30 AM 👻		
Duration in Minutes		
Duration in Minutes	_	
Conference Call Number		
		v
	Done	Cancel

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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



3.1.4 Attachments

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

M-0000100StateReview project StatusOwrMeetingMode	ie nei lifi	: - r : Te ed :	Crea est E 6/5/	te Everyti 2015	→ So hing 10:32	cheduled		Drop files here					
M-0000100		t		~	•	- -	• •	27	X	•			
Agenda Items				a de la calega	Nar	ne 🛆		Title	Rev	Ver	Туре	Actions	Description
Attachments					n h			Supplier			_	2	PCB
Decisions			0/*	1		DOC-000	0036	Samsung spec	0	1	Document		specification
Lifecycle													
History													
		<											>
											Page	e 1 🗸	of 1 🔸 🔲 🗉

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3.1.5 Decisions

The Decisions commands lists the decisions related to the meeting.

	M-0000100 R Review project Status	Review pr	roject Status	State : Cr Owner : Tes Modified : 6	reate → t Everythin /5/2015 1*	Scheduled		Drop files here	Supplier San	isung sp	Ø	
	M-0000100		•	\$ -	• 🛃 -	• 🖉	Y	= %	•			
	Agenda Items Attachments		Name 🔺		Туре	Revision	Û	Title	FromContext	Description	0	1
	Attendees		M DEC-0000	001	Deci	1		PCB	General D	New PCB approved	Te	e
(Decisions		M DEC-0000	002	Deci	1		Spe	General D	Specification need to b	e co Te	e
	lifecycle											
	History											
		<		>	<						2 objects	

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Status	Released		86

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

P-0000110	Bookmarks Decision	Discussions	Meetings	
Collaboration	Decisions			
Details		. 💷 . 📖 🛼 🛛	A 🗠 🚱 🖉	
Execution	— <u> </u>			
Experiments	Name 🔺	Type Revision	Title	FromContext Description
Financials	DEC-000004	De 1	Customer	General De Project Kick-C
Folders				
Objectives				
People				
Schedule				
	<	> <		
	Related Decisions		' 🔮 🗮 🔆 -	
	Name 🔺	Туре 🕴	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	
Туре	Decision	
Name		AutoName
Vault	eService Production	
Title	Project Kick-Off	
	Project Kick-Off Customer approval 15-2-201	12
Description		
Owner	Test Everything	<u>Clear</u>

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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

Droo Images here DEC-000004 Customer approval	Project Kick-Off 14-2-2012	State : Active Release Owner : Test Everything Modified : 6/5/2015 11:25:30 AM	Drop files here
DEC-000004 1	=• 斗 📑 🖬	l- 🜉 📲 🖉 🐬 🗮 🖇	≈-
Reference Documents	 Create New 	<u>ه</u>	Title
Where Used	* Document		
Applies To	Add Existing		
Discussions		-	
Revisions	Download		
Lifecycle	Checkout		
History	Remove X Delete		

Version	7	Date:	28-November-20)17
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.

PDPLS 1	Issues Meetings												
Collaboration	=· / 🗖 🕞 🐺	- 🔜 👫		Q 🗐 🔆 -									
Details													
Execution	🗌 Name 🔺	Edi 🍙	Ð	Reported Against	Classification	Description	Visibility	Domain	Action Taken	Priority	% Complete	Assignees Ed	lit Approv
Experiments			4.83	PDPL 8.1	Jogua Aprobl	Customor drawingo	External	Decign	12.0.11 . 6.0	Low	50	Kevin Borg	^
Financials	L @ 133-0000007			PDPL3 I	issue - A probi	Gustorner urawings	External	Design	15.9.11 - Su	LOW	50	Evan String	
Folders	🗆 🖢 ISS-0000008	1	0	PDPLS 1	Issue - A probl	Internal drawings + tollera	External	Design	13.9.11 - Th	Low	50	Kevin Borg 🧳	•
Objectives	🗆 👆 ISS-0000009	/	0	PDPLS 1	Issue - A probl	Connector colours	External	Design	13.9.11 - To	Low	50	Kevin Borg 🧳	,
People				2221.2.4		o	E		10.0.11 5		50	K : D	
Schedule	☐ 월 ISS-0000010		U	PDPLS 1	Issue - A probl	Size of graphic	External	Design	13.9.11 - FIn	Low	50	Kevin Borg 🥜	
Issues	🗆 🖢 ISS-0000011	/	1 🖺	PDPLS 1	Issue - A probl	Illumination (graphic)	External	Design	13.9.11 - No	Low	50	Test Everytl 🥖	•
	□ la ISS-0000012	/	0	PDPLS 1	Issue - A probl	Illumination JEWEL	External	Design	03.05.12 - In	Low	50	Test Everytl 🥖	,
	□ la ISS-0000013	/	0	PDPLS 1	Issue - A probl	DFMEA	External	Design	13.9.11 - Stil	Low	50	Test Everytl 🥖	,
	🔲 🖢 ISS-0000014	/	0	PDPLS 1	Issue - A probl	Header	External	Design	13.9.11 - JL	Low	50	Kevin Borg 🧳	•
	🗆 👆 ISS-0000015	/	1 🛅	PDPLS 1	Issue - A probl	Plunger	External	Design	13.9.11 - ne	Low	80	Test Everytl Kevin Borg	•
	< > Filter.Active	<											> 70 objects

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.

P-0000110	Create New		
*≁			
	Fields in red italics are required		
Туре	Issue		
Classification	-	Visibility External Visibility	n - 🗸
Priority	Low 🗸	Estimated Finish	
Description			.::
Assignee	·	Approver	v
	Leader, Demo		
	Borg, Kevin		
	Brand Manager, Demo		
	Everything, Test		Done Cancel

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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

🗆 Na	me 🔺	Edi	Ð			
0 9	ISS-0000007	/	1 🖻			
Edit Issue D	tails	4	0			
Q 🔆 -						
	Fields in red italics are required					^
Action Taken	09.14.2015,Johann Barbara,Check drawings.					.11
Classification	Issue - A problem that requires action to resolve	 Visibility 	External 🗸	Domain Too	oling + Bl	
Description	The timing for the bought in tooling for the JLR ESS hous	sing tool has been delayed, timin	g plan needs to be revised.			.4
Priority	Low	% Complete	10 🗸			
Cotimated						×
					Done	Cancel

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	ISS-0000074: Assignee								
÷	+ 🗐 🖓 - 🖉 🖓 🚱 🔆 -								
	Name 🛆	User Name	Company	Email	Primary User				
	Allen Carl Bonnici Test	allen	METHODE ELECTRONICS	AllenCarl.Bonnici@methode- eur.com	Primary				
	Eugenio Vella	Gino.vella	METHODE ELECTRONICS	Eugenio.Vella@methode-eur.com	-				
	Evan Stringos	evans	METHODE ELECTRONICS	Evan.Stringos@methode-eur.com	-				
				✓ Page 1 ¥	of 1 🔸 🔲 🗉				

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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

Tasks Approval Tasks	Projects	Issues 2 🗐 💥	Approval Issues	My Calendar			
🗆 Name 🔺	Edi 🍙	Ð	Reported Against	Classification	Description	Visibility	Domain
□ ﴾ ISS-0000105		0	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	10 🗸					
Action Taken	Design started					
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
					Done	Cancel

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

	Tasks Approval Tasks Projects Issues Approval Issues My Calendar Image: Im										
	🗌 Name 🔺	Edi 🏠 🗐	Reported Again	nst Classification	Description	Visibility	Domain				
	□ lss-0000105	/ 📕 🗸	Phase 1 (Projec	t Issue - A probl	test design	External	Design				
Vers	sion	7		Date:		28-November-	2017				
Stat	us	Released					93				

		RIENCE ENOV. A	Search			Q	•	1 ±	2 🐔	?
		Illumination (graphic)	State : Assign d		tivo	- Paviou	a L c	i	2	
	Images here	nomination (graphic)	Owner : Test Eve Modified : 6/19/20	erything 015 11:4	3:49 AM	- Review	Drop files here			Ţ
	ISS-0000011		- 🖉 🏹 ร่	€-						
	Assignees	Create New	Title	Rev	Ver	Type	Actions	Description	State	
	Reference Documents	💠 Add Existing								
	Reported Against	- Download		No	o Objec	ts Found	1			
	Resolved By	Chaskaut								
4	Resolved Items									
Ľ	Routes	× Delete								
	Discussions	∧ Delete								
	Lifecycle									
	History									
ja	vascript:void(0)							Page 1	v of1 ⊧	

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

test Sta Ow Mo	te : Create + Assign + Active ner : Test Everything dified : Mar 8, 2016 3:41:57 PM					\frown		
Properties				к <mark>ы</mark>		Assignees		
N 🔊 🗔	🗟 🔆 -				4	⋼∣≣₋д		27 🗟 🖇
Name	ISS-0000174							
Classification	Issue - A problem that requires action to resolve	Visibility	Internal	Domain		Name 🛆	User Name	Company
Description	test							METHODE
Action Taken						Zammit	joseph.zammit	ELECTRONICS
Priority	Low	% Complete	0					
Estimated Finish	Feb 29, 2016							
Actual Start								
Actual Finish								

That opens a search window

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i) cad-srv-apdev.methode-emea.lo	al:9090/3dspace	e/common/emxFullSearch.jsp?field=TYPE	%3Dtype_Person%3ACURRENT%3Dp
Search Refinement		Search Results 1 - 42 of a	pprox. 42 Results Page Size:
	Q 2	E Q• 🗣 🗔 🗄	• 📰 • 🔜 🧮 🔆 •
State: Active		🔲 Name 🔺	User Name
Name	•	3DIndexAdminUser	3DIndexAdminUser
Originated		VPLM Administration User	admin_platform
Modified		Alexander Galea	alexanderg
mounicu		Alison Galea	alison.galea
Description		Allen Carl Bonnici Test	allen
Change Assignment		Anabel Cutajar	anabel
Comment		Angelo Scerri	Angelo.scerri
Country		Anthony Caruana	anthonyc

Or using the Edit plus icon in the Assignee panel

Drop images here B Issue	test State : Create ← Owner : Test Everyth Modified : Mar 8, 201	Assign → Active Drop files here 16 3:41:57 PM
ISS 0000174	+)- ↓ □. □. □.	
Assignees	Name A	User Name
Reference Documents		
Reported Against	Image: A Joseph Zammit	joseph.zammit
Resolved By		
Resolved Items		
Resolved By Resolved Items		

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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.

 Collaboration and Approvals 	PowerView		\frown
Home Change Management User	Tasks Issues Ap Close Reject Image: Close	proval Tasks	Approval Issues
Home Engineering User			
Home Manufacturing User	□ Name ▲	Edi 🏠	E Repo

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

	Task	ь Ар	proval Tas	sks	Pre	ojects	Issue	s	Approval I	ssues	
(Close	Reject		•		•	-	2 7	7 😪 🗄	1 🔆 -	
					,,						
	✓ Name	e 🔺			Edi		Ð		Reported	Against	
	✓ ½ 1	<u>SS-00001</u>	105		Ø	5	0		Phase 1 (F	Project	
	10.1.68	.28:8111/end	via/common/	/emxNa	vigator)ialog.jsp					
	Reject										
	*⊀										
			Fields in	red ital	ics are re	quired					
(Commen	ts									
									.::		
								one	Cancel		

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4.6 Issues lists: filters

Issues Meetings 🔁 - 📄 🛟 🏹 🚱 =-0 * Create New Table View. 🗌 Name 🔺 Re Active ΛII 🗌 🖢 ISS-0000007 PD Closed 🔲 🖢 ISS-000008 0 PD

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

Apertura di Issues1459	174335188.csv
È nato scelto di aprin Lissues1459174 tipo: File con v da: http://cad- Che cosa deve fare	e 3335188.csv alori separati da vijuola (CSV) di Microsoft Excel (622 by sn-apder.constofde-emea.locat.9000 inforx con questo file?
 <u>Aprirlo con</u> <u>Salva file</u> 	Microsoft Excel (predefinita)
	OK Annulla

The file is generated in the Download folder

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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.

•	ENOVIA - Mozilla Firefox 🗕 🗖 🗙
10.1.68.28:8111/e	enovia/common/emxNavigatorDialog.jsp 🥐 💌
Send Reminde	u.
	Fields in red italics are required
Subject	Task Notification
Message	Please, provide an update for following task:
	Done Cancel

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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.

۲	ENOVIA - Mozilla Firefox					
10.1.68.28:811	1/enovia/common/emxNavigatorDialog.jsp		* *			
Edit Issue De	tails					
Q 🔆 -						
Action Taken			^			
Classification	Issue - A problem that requires action to resolve	Visibility External V	Design			
Description	Customer drawings					
Priority	Low	% Complete 0 ¥				
Estimated Finish		Assignee V Approver	v			
¢		Done	Cancel			

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4.8 Tasks Issues

Task assignees can create issues related to tasks:

Using the icon in the Tasks assigned table

Tasks Issues My Calendar								
Tasks Filter:Assigned Tasks								
🖉 🗔 🔒 - 🔲 - 📰 - 💭 🧭 🚱 🧱 🔆 -								
🗌 Name 🏠	Slip Days	₽ (5	State	% Complete	Project		
Project Kick-Off by custom	0	0	0	Active	8	PDPLS 1		
Kick-off meeting at custom	0	0	0	Active	50	PDPLS 1		
Project Kick-off MEM - PRF	0	0	0	Assign		PDPLS 1		
Methode recieves all desig	0	0	0	Assign		PDPLS 1		
Design Freeze	0	0	0	Assign		PDPLS 1		
PLS Gate 1 - Review and (0	0	0	Review		PDPLS 1		

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Using the same icon in the Project Schedule table

·		1	wou	neu . 9/1//2013 :	9.07.04 MIVI				
PDPLS 1	Activities Estima Gantt Ch	art Phas	e Gate	View					
Collaboration	Close Actions - Edit - Type	No	- 4		/ 💷 🔍	• 🗋 • E		🔼 🔽 🖼	' & .
Details	lask	¥ 1	V	•••••••••••••••••••••••••••••••••••••••		-			1 <i>1</i> /17a
Execution	□ Name	Туре	ld 🔺	Dependency	Ð		b (State	%
Experiments	🖃 🗆 🎽 PDPLS 1	Project S					70 5 5 5	Active	16.0
Financials Folders	🛨 🗕 🗌 🖓 Customer Milestone	Phase	1		0		0	Create	0.0
Objectives	🖃 🔶 📄 🗭 PLS PHASE 1 - Prog	Phase	11		0		0	Active	23.2
People	🖶 🗕 📄 🗭 Manage the Proje	Task	12		0		0	Active	32.6
Schedule		Task	17		2)	D	1 🖢	Active	60.0
	→ □ Project Kick-off ME	Task	18	17:FS+0.0 d	0	D	0	Complete	100.0
	< · · · · · · · · · · · · · · · · · · ·	٢							
	Filter: Lask Schedule View, Tasks								

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

i cad-srv-apo	dev.methode-emea.local:9090/3dspace/common/emxCreate.jsp?nameField=autoName&p	olicy=policy_Is:	sue8tshowPolicy=	false&form:	=type_PDS_Is	sueCreate&
PDPLS Crea	te New					
-%						
	Fields in red italics are required					
Туре	Issue					
Classification	Issue - A problem that requires action to resolve	Visibility	Internal 🔻	Domain	Design	•
Priority	Low	Estimated Finish				
Description	New issue					
•	n				Done	Cincel

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PDPLS	=- / 🛄 - 🗔	- 📃 🖉 🏹		≿ -	\frown
Assignees					
Issues	🗖 Name 🔺	Edi 🎪	Ð	Reported Against	Classification
Collaboration	b ISS-0000186		0	PDPLS	Issue - A probl
Deliverables			°.	T DT LO	issue Aprobili
Dependencies					
Properties					
Routes & Approvals					

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4.9 Issue details

 Collaboration and Approvals 	PowerView	
Home Change Management User	Tasks Issues Appr	roval Tasks Approval Issu
Home Engineering User		
Home Manufacturing User	■ Name ▲	Edi 🏤 🗐
Home Project Lead		
Home RFQ User	E ISS-0000180	0
Home	🗐 🄄 ISS-0000185	0

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.

Properties Assignees Name SS-000007 Classification Issue - A problem that requires action to resolve Visibility Extrando Ss-000007 Classification Issue - A problem that requires action to resolve Visibility Extrando Ss-000007 Cussification Issue - A problem that requires action to resolve Visibility Extrando 13.9.11 - Submitted 1 variant and got some feedback from JLR 15.11.11 - Submitted 1 variant and got some feedback from JLR in line for tool kick-of 15.11.11 - Submitted 1 variant and got some feedback from JLR in line for tool kick-of 15.11.11 - Submitted 1 variant and got some feedback from JLR in line for tool kick-of 15.11.11 - Submitted 1 variant and got some feedback from JLR in line for tool kick-of 15.11.11 - Submitted 1 variant and got some feedback from JLR in line for tool kick-of 15.11.11 - Submitted 1 variant and got some feedback from JLR in line for tool kick-of 15.11.11 - Submitted 1 variant and got some feedback from JLR in line for tool kick-of Frinish Mar1, 2014	2				-09	Incident 2015	n DS	Drop files here	Active Active Active Review 1:45:07 PM	State : Assign 4 Owner : Test Ever Modified : 9/15/20	Customer drawings	0000007 sue	ISS-C	Drop images here
Name ISS-000007 Classification Issue - A problem that requires action to resolve Visibility Description Customer drawings Customer drawings Image: Company Action Taken 13.9.11 - Submitted 1 variant and got some feedback from JLR. Action Taken 13.9.11 - Submitted 1 variant and got some feedback from JLR. Action Taken 13.9.11 - Submitted. Priority Low Vomplete 50 Finish Mar 1, 2014 Actual Start Jun 19, 2015 Actual Start Jun 19, 2015 Mare A Title Reference Documen Propred Against Resolved B Reference Documen Priority Doc.0000057 DS Incident 2015-09-07.xlsx 1 1 Document Name A tai Document DS Incident 2015-09-07.xlsx 1 1 1 Document Name A tai </th <th>к<mark>и</mark></th> <th></th> <th>~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~</th> <th></th> <th></th> <th>inees</th> <th>Assi</th> <th>¥2</th> <th></th> <th></th> <th>2</th> <th></th> <th>oerties</th> <th>Pro</th>	к <mark>и</mark>		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~			inees	Assi	¥2			2		oerties	Pro
Name ISS-000007 Classification Issue - A problem that requires action to resolve Visibility Exerciption Customer drawings Cassification Issue - A problem that requires action to resolve Visibility Exerciption Customer drawings Action Taken 13.9.11 - Submitted 1 variant and got some feedback from JLR, 13.9.11 - We need to send an updated version to JLR in line for tool kick-of 15.11.11 - Submitted. Priority Low % Complete Estimated Finish Mar 1, 2014 Actual Finish Mar 1, 2014 Actual Finish Reference Documen Reported Against Off Priority <td></td> <td></td> <td>≫-</td> <td>📮 🖉 👗 😪</td> <td>+* E</td> <td>3- 74 </td> <td>4</td> <td></td> <td></td> <td></td> <td>×\$-</td> <td>- 😫 3</td> <td>"</td> <td>1</td>			≫-	📮 🖉 👗 😪	+* E	3 - 7 4	4				×\$-	- 😫 3	"	1
Classification Issue - A problem that requires action to resolve Visibility External Domain Description Customer drawings Image: Stringos evans Mart HODE EtaCTRONICS Evan Stringos@methode- 13.9.11 - Vubmitted 13.9.11 - Vubmitted Vame % Stringos evans METHODE EtaCTRONICS Evan Stringos@methode- 13.9.11 - Vubmitted 13.9.11 - Vubmitted % Complete 50 Image: Stringos evans METHODE EtaCTRONICS Evan Stringos@methode- Priority Low % 50 Image: Stringos evans METHODE EtaCTRONICS Kevin Borg@methode- Estimated Mar 1, 2014 Image: Stringos Mart 1, 2014 Image: Stringos evan Stringos@methode- eur.com Actual Start Jun 19, 2015 Image: Stringos Reference Documen Image: Stringos evan Stringos Methode- Image: Stringos Reference Documen Image: Stringos Image: Stringos Image: Stringos evan Stringos Methode- Image: Stringos Reference Documen Image: Stringos Image: Stringos Image: Stringos Image: Stringos Image: Stringos Image: Stringos Reference Documen Image: Stringos Image: Stringos Image: Stringos Image: Stringos Image: Stringos Image: Stringos Image: Stringos Image: Stringos Image: Stringos Image: Stringos Image: Stringos Reference Documen Image: Stringos <td< td=""><td>Primary</td><td></td><td></td><td></td><td>User</td><td></td><td>_</td><td>^</td><td></td><td></td><td>007</td><td>ISS-0000</td><td></td><td>Name</td></td<>	Primary				User		_	^			007	ISS-0000		Name
Description Customer drawings 13.9.11 - Submitted 1 variant and got some feedback from JLR. 13.9.11 - Submitted 1 variant and got some feedback from JLR. Stringos evans METHODE ELECTRONICS Evan Stringos@methode-eur.com Priority Low % Complete 50 Stimated Mar 1, 2014 Complete % Kevin Borg kevinb METHODE ELECTRONICS Evan Stringos@methode-eur.com Estimated Mar 1, 2014 Jun 19, 2015 Reported Against Resolved B Reference Documen Euler CTRONICS Euler CTRONICS <td< td=""><td>User</td><td></td><td>Email</td><td>Company</td><td>Name</td><td>me 🛆</td><td> Na</td><td>Domair</td><td>ility External</td><td>ction to resolve Vi</td><td>problem that requires a</td><td>Issue - A</td><td>fication</td><td>Class</td></td<>	User		Email	Company	Name	me 🛆	Na	Domair	ility External	ction to resolve Vi	problem that requires a	Issue - A	fication	Class
13.9.11 - Submitted 1 variant and got some feedback from JLR. 13.9.11 - Vue meed to send an updated version to JLR in line for tool kick-of 15.11.11 - Submitted. *tion Taken 13.9.11 - Vue meed to send an updated version to JLR in line for tool kick-of 15.11.11 - Submitted. *tion Taken 13.9.11 - Vue meed to send an updated version to JLR in line for tool kick-of 15.11.11 - Submitted. *tion Taken 13.9.11 - Vue meed to send an updated version to JLR in line for tool kick-of 15.11.11 - Submitted. *tion Taken 13.9.11 - Vue meed to send an updated version to JLR in line for tool kick-of 15.11.11 - Submitted. *tion Taken 13.9.11 - Vue meed to send an updated version to JLR in line for tool kick-of 15.11.11 - Submitted. *tion Taken Mar 1, 2014 *total Start Jun 19, 2015 *total Start Jun 19, 2015 *total Start Resolved B Reference Documen ************************************		methode-	Evan.Stringos@n	METHODE		Evan					r drawings	Custome	iption	esci
Ludri Takeni 10.5.11.11 - Submitted. isinit Low % complete 50 stimated mish Mar 1, 2014 ctual Start Jun 19, 2015 rtual Einich Reported Against Resolved B Reference Documen ■	-		eur.com	ELECTRONICS	evans	Stringos	Π.	1	m JLR.	d got some feedback	Submitted 1 variant an	13.9.11 -	Tokon	otion
hrinning Low 600 50 istimated Mar 1, 2014 ketual Start Jun 19, 2015 Ketual Finish Resolved B Reference Documen ■ ● Name △ Title Rev Ver Type Actions Description State 0/1 ▲ Doc-0000057 DS Incident 2015-09-07.xlsx 1 1 Document Sa 4 &	-	thode-	Kevin.Borg@met	METHODE	kevinb	Kevin Borg			TITLE TOT LOOT KICK-OT	Jualeu Version to JER	- Submitted.	15.11.11	laken	CUOI
Estimated inisis Mar 1, 2014 Actual Start Jun 19, 2015 Actual Start Jun 19, 2015 Reported Against Reference Documen ■ • Name △ Title Rev Ver Type Actions Description State Of1 © Doc-0000057 DS Incident 2015-09-07.xlsx 1			culcom	LELOTTONIOS					plete 50	% Ci		Low	/	Priorit
Lictual Statt Jun 19, 2015 Intruel Finish Image: Construction of the second secon											14	Mar 1, 20	ated	stim inish
Reported Against Resolved B Resolved B Reference Document Resolved B Resolved B Resolved B Reference Document Re											015	Jun 19, 2	Start	Actua
Reported Against Resolved B Reference Documen Image: Image	of 1 🕨 🔲 🖗	Page 1 V	4					~					Finish	ictua
■ ● Name △ Title Rev Ver Type Actions Description State 0 0/1 ▷									>	ference Documen	Resolved B Re	gainst	orted Ag	Rep
🛾 0/1 🕈 DOC-0000057 DS Incident 2015-09-07.xlsx 1 1 Document 🔊 🛓 🖗 🖗 In Work		State	Description	ctions	A	Туре	Ver	Rev		Title	۵	Name	•@	6
		In Work		M 🛓 🖨 🛱	5	Document	1	1)7.xlsx	DS Incident 2015-0	C-0000057	DO 🗈	1] 0

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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)

 Collaboration and Approvals 	Issues Summary								<n <=""></n>	Hide Panel	There are 43 issues
Home Project User	📑 - 📰 - 🔜	「「「」	*							Selec	.t All
Home RFQ User										▼ Issues by Priority	
Home	Name 🔺	Edit	٨	€	Reported Against	Classification	Description	Visibility	Domain Action Taken	Urgent 0	
Issues Summary	b ISS-000002	1	F .	1 🛐	PDPLS 1	Issue - A probl	Specifications needs conc	External	Design Change po.	High 8 Medium	16
Shortcuts	b ISS-0000004	1		0	PDPLS 1	Issue - A probl	A surfaces	External	Design 17.2.11 - Stil	Low	19
Collections	A 155-000005	1		0	PDPLS 1	Issue - A probl	BOM	External	Design 17.2.11 - Stil	Pre-assigned 0	16 18 20
Tasks		-		•		issue - riprovi	bom	Longition	beagn macht our		10 10 20
Subscriptions	b ISS-0000006	1		0	PDPLS 1	Issue - A probl	Interface with Tier 1	External	Design 6.9.11 - Fina	✓ Issues by State	
Meetings	M ISS-0000007	1	1	1 🎦	PDPLS 1	Issue - A probl	Customer drawings	External	Design 13.9.11 - Su.		Assign
My Calendar	b ISS-000008	1		0	PDPLS 1	Issue - A probl	Internal drawings + tollera	External	Design 13.9.11 - Th.		Active (33)
Decisions	b ISS-000009			0	PDPLS 1	Issue - A probl	Connector colours	External	Design 13.9.11 - To	Review	v(1)
Discussions	8 100 000000				101201	issue represent	Connector coldars	Concerning.	Dedigit 10.0.11 10.	Closed (5)
	b ISS-0000010	1		0	PDPLS 1	Issue - A probl	Size of graphic	External	Design 13.9.11 - Fin		
	b ISS-0000014	1	P.,	0	PDPLS 1	Issue - A probl	Header	External	Design 13.9.11 - JL.	Issues by Problem Type	
	8 ISS-000015	1	1	1 🛅	PDPLS 1	Issue - A probl	Plunger	External	Design 13.9.11 - ne.	* Average duration by Priority (in days)	
	8 ISS-0000018	1	R .	0	PDPLS 1	Issue - A probl	Assembly drawings	External	Design 3.1.12 - To b	Urgent 0	
	b ISS-0000019	1		0	PDPLS 1	Issue - A probl	Water ingress - rubber mat	External	Design 17.2.12 - To	High Medium	129
	5 ISS-000023	1		0	PDPLS 1	Issue - A probl	JLR initial AAR comments	External	Design 28.2.12 Flas	Low Pre-assigned	128
	<						_		,	0 25 50 75 100	125 150

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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 standard structure	o create	project with a
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

 Collaboration and Approvals 	d	Ê	F	Projec	ts	Prog	grams (Projec	sts Sumr	nary			
Hama Change			Pr	ojects	Filte	er:Activ	/e						
Management Us	er		A	ctions	-	7	-	-	-	7 5			
Home Engineerir User	ng			Name	•				Curren	t Phase Ty			
Home Manufactu	iring		Ð	- 🏹	Davi	d Plan	1			Pr			
User				-	David	d Trair	nina			Pr			
Home Project Le	ad				Davis		mig						
Home REO Lise	-		+	🗉 🎽	McLa	aren P	14			Pr			
Home KrQ Use		-11	÷	- 🏹	P1				PLS PH	HASE Pr			
Projects								<合	< >	» Hide Panel		There	are 8 active proje
🛄 - 📑 - 📰 - 🜉	+	2	7 🔳	*.						Pending Tasks			
Name		Curre	nt Phase	Туре	Status	Owner	Estimated Finish	Date	Act Finish	TEST EC CN Process Temp	8		
TEST		Fase1		Proj	Create	Test	Apr 14, 2015			EC CN Supplier Tem CO-0000136	15		
🗌 🎽 EC CN Process Tem		Admini	strativ	Proj	Create	Test	Aug 17, 2015			EC-0000136 RENAULT 1540	19		
🗌 🎽 EC CN Supplier Tem		Admini	strativ	Proj	Create	Test	Aug 17, 2015			Test 1			106
🗌 🎽 CO-0000136		Admini	strativ	Proj	Create	Test	Aug 17, 2015			0000110	25	50 75	100 12
EC-0000136		Admini	strativ	Proj	Create	Test	Aug 17, 2015			7 This Week	36 This Month	34 Next 30 Days	76 Overde
🗌 🎽 RENAULT I540		Custon	ner Mi	Proj	Create	Test	Jun 1, 2016			Pending Delivera	bles		
🗌 🎽 Test 1		PLS PH	HASE	Proj	Create	Test	Mar 7, 2017			, i onaniy bonnona			
🛛 🔊 P-0000110		PLS PH	HASE	Proj	Active	Test	Mar 7, 2017			0 This Week	0 This Month	0 Next 30 Days	0 Overdu
										✓ Pending Issues	0	0.0	67
										U This Week	U This Month	U Next 30 Days	07 Overdu
										 Assessments 			
										▶ Efforts			
c	>	۲							>	P-0000110			

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5.2 Project dashboard

🕞 возсн	Bosch Project Space (2914	310 P	roject from templ emplate Splitted	ate:PDPLS -	State : Crea Owner : elias.r Modified : Mar	te → Assign noussa 23, 2016 4:50:1	7 PM							〈合	< >	Q
Bosch	Schedule Status	Busines	s Status													
Collaboration Details	▼ Project Status								• 1	op Leve	l Tasks					
Execution	Progress	Slipped By	Late Tasks	Members	Milestones	Budget	Risk	Issue	,			7				
Experiments				-												
Financials	0% On Time	U Days	0 Critical	Overloaded	0% 0 Missed	U% Consumed	0% Severe	U% Severe	0	1	2	3	4	5 1	5 7	8
Folders										Pe	ending	Overdue	e 📒 Late	Start 🔲 (Completed	
Objectives																
People	▼ All Tasks				▼ Delivera	ables			+ (ritical Ta	asks					
Schedule																
Issues)		
Members and Roles			Idle: 100%										└ Idle:	100%		
	Pending				Pend	ing				Pending						
	Late Start				Late St	art				Late Star						
	Completed	25 50	75 100	125 150	Comple	ed	0			Completed	0	10	20	30	40	50
	2 This Week 7	7 This Month	7 Next 30 Days	25 Overdue	e O This Week	0 This Mon	th 0 Next 30 Da	ays 0 Overo	lue O Th	is Week	0	This Month	1 N	ext 30 Days	4	4 Overdue

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

	INC	uilleu . Mai 25	, 2010	4.00.17 PW				
Bosch	Activities Estima Gantt Chart Phase Gate View							
Collaboration	Actions - Edit - Type Task - No 1 - 🕮 🚟 😣	N 🛃		-	- = -	7 🗐	8	*-
Details								
Execution	Name	Туре	ld	Dependency	Ð	6	٨	State
Experiments	🖃 🕅 🏹 Bosch	Project S				3 5 5 5		Create
Financials		Phase	1		0	0		Create
Folders		Thase			0	v		-
Objectives		Phase	11		0	0		Create
People	🕢 🛧 🗐 🖓 PLS PHASE 2 - Prototype Development	Phase	67		0	0		Create
Schedule		Phase	98		0	0		Create
sues	🕀 🗕 🗇 🕑 PLS PHASE 4 - Production Launch	Phase	140		0	0		Create
Members and Roles	★ → PLS PHASE 5 - Release to production	Phase	162		0	0		Create
	★ → □ Sample deliveries	Phase	168		0	0		Create

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5.4 Phases and Gates dashboard

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

		Modified : Mar 23, 2016 4:50:1	/ PM		
Bosch	Activities Estima Ga	antt Chart Phase Gate View			
Collaboration					_
Details					
Execution	Nov 26, 2015 - Dec 13,	Nov 23, 2015 - May 24, 2017	Gate 1	Mar 7, 2016 - Dec 21, 2016	
Experiments	2017	NOV 23, 2013 - May 24, 2017	Gate	Wai 7, 2010 - Dec 21, 2010	1
Financials					
Folders		[-
Objectives	Customer Milestones	PLS PHASE 1 - Program Release and Concept Development	\bigcirc	PLS PHASE 2 - Prototype Development	
People					
Schedule					

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Status	Released		108	3
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 standard structure	o create	project with a
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 Calendar	Locations				
Events	* 💿 🗔 -	🗔 - 🖉 🏹 🚱 🔆 -				
Locations	Title	Frequency	Start Date	End Date	Day Number	Notes
	Sunday	Weekly			Sunday	Sunday
	Saint Steve	Non-Recurrence	Dec 26, 2015	Dec 26, 2015		Saint Steve
	Noel	Non-Recurrence	Dec 25, 2015	Dec 25, 2015		Noel
Create New Event						
**						
Title						
Frequency	Non-Recurrence 🗸					
Start Date	Non-Recurrence Weekly					
End Date						
Note			.ii.			
		Do	Cancel			

Only PLM Administrator can define location, user and calendar

Select command View My Company

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	RIENC
Shortcuts	Pov
Collections	Is
Member Lists	
View My Company	
Evnerience	1.1.0

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

	1	iounicu . 10/0/2	010 11.08.08 AW		
Company Name	*	- 🗙 🗋	- 🖪 - 🏹 :	} ∼	
Business Skills		Name A	Tupo	City	Sto.
Business Units			iype	City	Jia
Calendar		Segypt	Manufacturing Site	Samaya	
Capabilities		🚱 Malta	Manufacturing Site	Malta	
Collaboration Partners					
Departments					
Formats					
Location					

Select command Calendar, define calendar for sites

`	woulled . 10/13/2	010 4.00.40 FW		
Company Name	* 😣 🔒	- 🔁 🖓 🌶	&-	
Business Skills	Name	Type	Description	State
Business Units	realize	ijpe	Description	State
	E E E E E E E E E E E E E E E E E E E	Work Calendar	Work Calendar for Equation	Active
Calendar	суурс	WORK Calendar	Work Calendar for Egypt location	Active
	🗆 🛱 Malta	Work Calendar	Work Calendar for Malta location	Active
Capabilities		Work Odiendar		710110
Collaboration Partners				

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

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Status	Released			110

Name 🔺	Employee	Email	State	License Type	Organizational I
3DIndexAdminUser	Yes		Active	Full	1
🔲 🏠 admin_platform	Yes	Unknown	Active	Full	
🗆 🏠 DemoBrandManager	Yes	a@a.it	Active	Full	Project User, Ba
🗆 🏠 DemoLeader	Yes	a@a.it	Active	Full	Project User, Bas
🗌 🏠 kevinb	Yes	Kevin.Bor	Active	Full	Basic User, Emp
🗆 🕼 Test Everything	Yes	warren@	Active	Full	Specification Ma

Edit My Profile		
% -		
oominin accinera		^
State	Active	
First Name	Kevin	
Middle Name		
Last Name	Borg	
Company	🙀 Company Name	
Business Unit	×	
Location	Malta	
Company Representative	Malta Egypt hpany Representative	
	Done Cancel	Ĭ

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 standard structure	o create	project with a
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' 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

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

≫-			
	Fields in red italics are required		
Project Template	<u>Clear</u>		
Questions		Predict Schedule	
Name	AutoName		
Туре	Project Space	Project Date	Oct 13, 2015
Description			
Copy Options	Financial Data Folders	Resource Template	
Copy Options Project Schedulin	✓Financial Data ✓Folders	Resource Template	
Copy Options Project Schedulin Schedule From	Project Start Date Project Start Date	Resource Template	As Soon As Possible V
Copy Options Project Schedulin Schedule From Related Info	ØFinancial Data ØFolders 9 Project Start Date 💌	Resource Template Default Constraint	As Soon As Possible V
Copy Options Project Schedulin Schedule From Related Info Business Unit	© Financial Data © Folders 9 Project Start Date v	Resource Template Default Constraint Base Currency	As Soon As Possible V
Copy Options Project Schedulin Schedule From Related Info Business Unit Program	© Financial Data © Folders 9 Project Start Date ♥ Clear X152	Resource Template Default Constraint Base Currency Project Visibility	As Soon As Possible V Euro V Members V

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

Test 1	Properties	Preferences Duratio	n Keywords	Lifecy
Collaboration				
Details		Fields in red italics are require	ed	
Execution	Туре	Project Space		
Experiments	Name	Test 1		
Financials	Policy	Project Space 👻		
Folders	Project Owner	Test Everything		
Objectives	,	Test1 PDPLS - Templ	ate	
People	Description			
Schedule	Description			
Issues	Project Status	Active		
	Visibility	Members		
	Creation Date	Jun 1, 2015		
	Company Name	Company Name		
	Business Unit		Clear	
	Program	X152	Clear	

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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



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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 standard structure	o create	project with a
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

 Collaboration and Approvals 	Projects	Programs	Projects Sur	nmary	Project Tem	nplates Po	rtfolios	Product	s
Home Change	Products Fil	lter:Owned							
Management User	Actions - F	Reports 🗸 🖉	-	- - ==	- 📑 📑	279) E	⋧ ∙	
Home Project Lead	r 🏶 Create		Name		Model	Revisio	Type		Govern
Home Project User				•	mouch	Revision	Type		oovern
Home	Add to Port	folio						No O	bjects F
Issues Summary	Copy Selec		-						
Shortcuts	× Delete								

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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
*-
Fleids in red Italics are required
Name
C12345 AutoName
Туре
Hardware Product
Rev
A
Description
Switch for new product
Company
METHODE ELECTRONICS
Owner
Joseph Zammit
Design Responsibility
Marketing Name
C12345
012010
Marketing Text
C12345: Switch for new product
Policy
Product V
Done Cancel
- Concer

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

Projects Programs Products Filter:All Actions - Reports -	Projects Summa	rry Project Ter	nplates	Portfolios
Marketing Name	Name *	Create New Table View	sion	Туре
12345Customer2	12345Cust	Al		Hardware
🗌 📦 155T-A1734-AA	155T-A173.	Owned		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-000004	A	Hardware
Glove Box SW	HP-0000001	Р-000001	A	Hardware
Version	7			Date

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

Drop Images here Bare Hardware Pro	Switch for n	ew product State : F Owner : jo Modified : 1	Preliminary Product I seph.zammit 1/7/2016 3:19:39 PM	Management			〈令
	Properties	nages Lifecycle	Routes History	Variants	Projects		
© C12345 A	Actions -	Q 🔆 -					
	Basics						
	Name	C12345					
	Revision	A					
	Туре	Hardware Product					
	Owner	Joseph Zammit					
	Policy	Product					
	Derivation Details						
	Derivation Type	Revision			Derived From	Root	Derivatior
	Higher Revision Exists	No			New Derivation Exists	No	
	State						
	State	Preliminary			Active Engineering Change Exists	No	
	Additional Informat	tion					
	Product Line				Company		ONICS
	Model	C12345			Model Prefix		
	Design Responsibility	METHODE ELECTRO	DNICS		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
⊟ 💞 C12345 A	Actions					
± 📑 000000424 00	Collaborate with Physical					
± 🛃 000000440 00	Edit Details	5				
	Add to Portfolio					
	🗅 Сору	are Product				
	Subscribe	Zammit				
	Policy Produ	uct				

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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 it is search for variants to add.

Dauct (A)	Modified : 1///201	6 3119139 PM			
Properties Image	es Lifecycle Ro	utes History	Variants Pr		
	📭 📑 🖬 -	📃 🚏 🖉 🏹	' 😫 🛒 🛠		
🗌 Name 🔺	Rev Descripti	on			
Search Refinement	Search Results 1 - 50 of ap	prox. 16806 Results Page Si	ize: 50 🕨 (Max Value:	1000)	456789
Q	2 🕒 🔍 - 👞 - 🗔 - 🛽	I· 🔜 🎝 🛒 🔆			
Policy: EC Part	Name 🔺	Rev Type	Description	State	
 Taxonomies 	00-9496-517.849	00A Vendor Part Number	1	Preliminary	₽ ^
 Types 	00-9496-517.850	00A Vendor Part Number		Preliminary	0
Part(16806)	000000002	02B Part	EPB RH	Released	0
Manufacturing Part(1)	000000002	01A Part	EPB RH	Released	e
⊞ □ Hardware Part(865)	000000003	00B Part	Roof Switch	Approved	•
Libraries	000000003	00A Part	Roof Switch	Approved	e
 Electronic Components(1) 	000000003	00C Part	Roof Switch	Peleased	Ð
Miscellaneous Materials(3)	00000008	00A Part	Roof Switch LH	Released	e
 Attributes 	000000009	00A Part	Roof Switch RH	Released	Ð
Name	000000010	00A Part	V1 Switch volume scenar	Released	e
Originated	000000010	00B Part	V1 Switch volume scenar	Released	Ð
Madified	000000011	01C Part	M1/M2 = HDSCS = Base	Released	e
Modified	000000011	00B Part	M1/M2 = HDSCS = Base	Released	Ð
Description	000000013	00A Part	Toggle	Preliminary	e
Comment	000000014	00A Part	Button	Preliminary	•
Component Type	< 000000017 >	004 Port	Button	Rabooad	>
< >					Submit

After the part selection, the variant table is updated

Properties Images	Lifecycl	le Routes History Variants Projects
Name 🔺	Rev	Description
000000424	00A	Switch
000000440	00A	EPB Color Black

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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.

ict (A)		Modif	ied : 1/7	/2016 3:19:3	9 PM		\frown
Properties	Images	Lifecyc	le	Routes	History	Variants	Projects
Associate Proje.	Make	Governin	g g	- 📮	🗣 🖪	- = -	
🗌 Name 🔺		۵	#	Туре	Descr	iption	Est. Finish
							No Obj
Select Projects							
Add Project(s)	a 🛃 - 🕻	1.	a - [-	1	7 💽 🗐	
0			-				1 V C.

🗌 Name 🔺	Туре	Description	Owner				
🕀 🗌 💓 Bosch	Project Space	Project from template:PD	Elias Moussa ^				
🕀 🗌 👔 🛛 David Plan	Project Space	David Plan	Joseph Zammit				
🕀 🗌 🧾 Exp-0000137	Experiment	P1	Joseph Zammit				
🕀 🔜 🧏 Exp-0000144	Experiment	P1	Joseph Zammit				
🕀 🗌 🎽 KAPWG	Project Space	Kongsberg Power Grid	Elias Moussa				
🛨 🛃 🔉 McLaren P14	Project Space	McLaren P14 Window lift	Joseph Zammit				
+ 🗑 P14	Program	P14	Test Everything				
🕀 🗌 👔 PLM Implementation	Project Space	PLM implementation proj	Joseph Zammit				
🕀 🗌 🎽 Project1	Project Space		Edward Gingell 🗸 🗸				
< >	<		>				
			29 objects, 1 selected				

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

	- 85	
"Make Governing Project". The icon		identifies the main project.

Properties Ima	ages Lifecyc	le	Routes	His	tory	Variants	Proje	ects
Associate Proje	Make Governin	9 F		. .			-	2
✓ Name ▲	۵	#	Туре		Descript	tion		Est. Fi
McLaren P14		8	Project S	p	McLaren	P14 Wind	ow lift	Mar 30

.....

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

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Drop Images here McLaren P14	21449	McLaren P14 DNR, central	4 Window life I control con	ters, sole	State : Cres Owner : josep Modified : 1/7/2
McLaren P14	Busin	ess Goals	Quality	Gove	rned Items
Collaboration		• • • • •		7	3 📰 🔆 -
Details				Tura	
Execution	Name 🔺			Type	
Experiments	C12345			Hardw	/are Product
Financials					
Folders					
Objectives					
People					

Version	7 Date:		28-November-2017	
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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 standard structure	o create	project with a
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

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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

	ENOVIA -	- Open		×
Look in				
ENOVIA	Nome	Tipo	Revisione	Descrizione
Query salvate Progetti	RFQ000004-03 123 CN Engineering Template CN Engineering 0000000011 RFQ000005-01 RFQ000002-01 RFQ000001-02 RFQ000001-02 RFQ000003-01 RFQ000003-01 RFQ000004-01	Progetto concettuale Area di progetto Area di progetto Progetto concettuale Progetto concettuale Progetto concettuale Area di progetto Area di progetto Progetto concettuale Progetto concettuale Progetto concettuale Progetto concettuale	21431942428717 301432220871732 141431808821829 541431936771369 61430142383308 261429975229485 111431706848472 61432160147348 191433173925684 301429975865776 281429975320980 41430136973958	Brake Dual for new r CN Engineering Tem Project from CN Eng Quotation for new s EPB / Roof Switch RFQ for Switch Start Brake Dual for new r 00000022 CN Suppl Test 1 PDPLS - Temp EPB / Roof Switch Brake Dual Brake Dual for new r
	<	Progetto concettuale	11429045326255	EPB / Roof Switch

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

i	D 🗸	Task Name 👻	WBS 💂	Task	State 💂	%	Est Duration 💂	Est Start 👻	Est Finish	28 Jun '15 05 Jul '
-			-	Type	-	Complete				FSSMTWTFSSM
1	0	- PDPLS 1	0	ect 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 02/0	
	2	Supplier Nomination	1.1	Milestone	Create	0%	0 days	Wed 01/07/15	Wed 01/0	
	3	Design Freeze - Mechanical & Electrical	1.2	Milestone	Create	0%	0 days	Thu 13/08/15	Thu 13/0	
	4	Parts from 1st Tooling - FOT's (RDV0/VFF)	1.3	Milestone	Create	0%	0 days	Wed 23/03/16	Wed 23/0	
	5	Vehicle Check (VC/VFF) LOT B-Serie	1.4	Milestone	Create	0%	0 days	Wed 06/04/16	Wed 06/0	
	6	Plant Trial (PT/PVS/BMG/C-Serie) 1	1.5	Milestone	Create	0%	0 days	Wed 04/05/16	Wed 04/0	
	7	Plant Trial (PT/0-Serie/Note 3/D-Serie/PPAP1) 2	1.6	Milestone	Create	0%	0 days	Wed 10/08/16	Wed 10/0	
	8	PSW (KO/Note 1/PPAP3)	1.7	Milestone	Create	0%	0 days	Mon 02/01/17	Mon 02/0	
	9	Manufacturing Approval	1.8	Milestone	Create	0%	0 days	Tue 27/09/16	Tue 27/0	
	10	Start of Agreement - SOP (Mass Production)	1.9	Milestone	Create	0%	0 days	Wed 01/07/15	Wed 01/0	• 01/07
	11	PLS PHASE 1 - Program Release and Concept Development	2	Phase	Create	0%	360 days	Wed 01/07/15	Wed 16/1	
	12	Manage the Project Tasks	2.1	Task	Create	0%	360 days	Wed 01/07/15	Wed 16/1	
	13	Project Communication External	2.1.1	Task	Create	0%	300 days	Wed 01/07/15	Wed 24/0	
	14	Project Communication Internal - Core team	2.1.2	Task	Create	0%	360 days	Wed 01/07/15	Wed 16/1	
	15	Project Communication Internal - Service functions	2.1.3	Task	Create	0%	360 days	Wed 01/07/15	Wed 16/1	
	16	Project Management / Admin	2.1.4	Task	Create	0%	360 days	Wed 01/07/15	Wed 16/1	
	17	Project Kick-Off by customer - SOW and LOI available	2.2	Task	Create	0%	0 days	Wed 01/07/15	Wed 01/0	♦ 01/07
	18	Project Kick-off MEM - PRF issued and team formed	2.3	Task	Create	0%	5 days	Wed 01/07/15	Wed 08/0	
	19	Kick-off meeting at customer	2.4	Task	Create	0%	1 day	Wed 01/07/15	Thu 02/0	i i i i i i i i i i i i i i i i i i i

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Search for Projects searches for projects with search criteria

		Search		×			
Actions							
-	4						
l ype:	Area di proge	etto	<u></u>				
Name:	×						
Revision:	×						
Title:	×						
Owner:	×						
Created After:		•					
Created Before:		•					
Vault	Vault predefi	inito 💌	_				
Limit Results to: 10	00	Basic Searc	h Cancel				
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Look in							
ENOVIA	4-11-11-1	Nome		Revisione		Тіро	Descrizione
Query salv	della ricei /ate	000000022 CN Su 123 CN Engineeri	pplier Template	6143216014	7348	Area di progetto	000000022 CN Supplier To CN Engineering Template
Progetti	l	CN Engineering (000000011	1414318088	21829	Area di progetto	Project from CN Enginee
		PDPLS 1		1914331739	25684	Area di progetto	Test 1 PDPLS - Template
<	>	<			1		>
			Open	Cancel			

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

6	D .	Task Name 👻	WBS 🗸	Task Type 🔻	State 💂	% Complete 👻	Est Duration	Est Start 👻	Est Finish	28 Jun '15 05 Jul' F S S M T W T F S S M
1		D = PDPLS 1	0	ect 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 02/0	
		2 Supplier Nomination	1.1	Milestone	Create	0%	0 days	Wed 01/07/15	Wed 01/0	
		3 Design Freeze - Mechanical & Electrical	1.2	Milestone	Create	0%	0 days	Thu 13/08/15	Thu 13/0	
		4 Parts from 1st Tooling - FOT's (RDV0/VFF)	1.3	Milestone	Create	0%	0 days	Wed 23/03/16	Wed 23/0	
		5 Vehicle Check (VC/VFF) LOT B-Serie	1.4	Milestone	Create	0%	0 days	Wed 06/04/16	Wed 06/0	
		6 Plant Trial (PT/PVS/BMG/C-Serie) 1	1.5	Milestone	Create	0%	0 days	Wed 04/05/16	Wed 04/0	
		7 Plant Trial (PT/0-Serie/Note 3/D-Serie/PPAP1) 2	1.6	Milestone	Create	0%	0 days	Wed 10/08/16	Wed 10/0	
		8 PSW (KO/Note 1/PPAP3)	1.7	Milestone	Create	0%	0 days	Mon 02/01/17	Mon 02/0	
		9 Manufacturing Approval	1.8	Milestone	Create	0%	0 days	Tue 27/09/16	Tue 27/0	
	1	0 Start of Agreement - SOP (Mass Production)	1.9	Milestone	Create	0%	0 days	Wed 01/07/15	Wed 01/0	• 01/07
	1	PLS PHASE 1 - Program Release and Concept Development	2	Phase	Create	0%	360 days	Wed 01/07/15	Wed 16/1	
	1	2	2.1	Task	Create	0%	360 days	Wed 01/07/15	Wed 16/1	
	1	3 Project Communication External	2.1.1	Task	Create	0%	300 days	Wed 01/07/15	Wed 24/0	
	1	4 Project Communication Internal - Core team	2.1.2	Task	Create	0%	360 days	Wed 01/07/15	Wed 16/1	
	1	5 Project Communication Internal - Service functions	2.1.3	Task	Create	0%	360 days	Wed 01/07/15	Wed 16/1	
	1	6 Project Management / Admin	2.1.4	Task	Create	0%	360 days	Wed 01/07/15	Wed 16/1	
	1	7 Project Kick-Off by customer - SOW and LOI available	2.2	Task	Create	0%	0 days	Wed 01/07/15	Wed 01/0	♦ 01/07
	1	8 Project Kick-off MEM - PRF issued and team formed	2.3	Task	Create	0%	5 days	Wed 01/07/15	Wed 08/0	
	1	9 Kick-off meeting at customer	2.4	Task	Create	0%	1 day	Wed 01/07/15	Thu 02/0	L 📥

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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
∦	Cu <u>t</u>	1	7864.18266.489.37220	Customer Milestones
	<u>C</u> opy	11	7864.18266.489.53492	+ PLS PHASE 1 -
	<u>P</u> aste			Program Release and Concept
	Paste <u>S</u> pecial			Development
	<u>W</u> rap Text	48	7864.18266.493.50552	PLS PHASE 3 - Production
T.	Insert <u>C</u> olumn			Development
٧	Hide Column	49	7864.18266.493.51780	 Switch components
Α	<u>F</u> ont			
A	<u>T</u> ext Styles	50	7864.18266.493.51847	Make/Buy decision
1	<u>F</u> ield Settings	51	7864.18266.493.53754	Final Tool
	Custom Fiel <u>d</u> s			manufacturer and supplier
-	<u>D</u> ata Type →			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	Reciept 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	Reciept 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		Reciept 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		Reciept of tuned parts	3.1.6.8
		1		

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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.

tory/Op 🗸	Resource Names 👻		
Optional		1	
Optional			
Optional			
Optional	Spiteri Matthew	3DEXPERIENCE - Convalida risorse	onal Evendhing Tes
Optional	Borg Kevin		onal Everything Tes
Optional	Spiteri Matthew	assegnate a una o più attività	nal Everything T
Optional	Spiteri Matthew	aaaa	onal Everything Tes
Optional	Spiteri Matthew		onal Everything Tes
Optional	Stringos Evan		onal aaaa
Optional	Stringos Evan;Everything Test		nal
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Optional	Everything Test	03/11 FITT700/11 Tytning Test 20 23FF Opti	onal

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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

		Progra	Stato	Percen	Proprie	^		Nome	1	Progra	Stato	Percen	. Proprie.
🖃 PDPI	LS 1	0	Crea	0	Everyt			⊡- P	DPLS 1		Crea	0	Everyt
🕀 🗘	ustomer Milestones	1	Crea	0	Everyt			Ę	Customer Milestones	1	Crea	0	Everyt
	Supplier Nomination	1.1	Crea	0	Everyt				Supplier Nomination	1.1	Crea	0	Everyt
	Design Freeze - Mechanical	1.2	Crea	0	Everyt				 Design Freeze - Mechanical 	1.2	Crea	0	Everyt
	Parts from 1st Tooling - FOT	1.3	Crea	0	Everyt				Parts from 1st Tooling - FOT	1.3	Crea	0	Everyt
	Vehicle Check (VC/VFF) LO	1.4	Crea	0	Everyt				Vehicle Check (VC/VFF) LO	1.4	Crea	0	Everyt
	Plant Trial (PT/PVS/BMG/	1.5	Crea	0	Everyt				Plant Trial (PT/PVS/BMG/	1.5	Crea	0	Everyt
	Plant Trial (PT/0-Serie/Note	1.6	Crea	0	Everyt		ă 🗌		Plant Trial (PT/0-Serie/Note	1.6	Crea	0	Everyt
	PSW (KO/Note 1/PPAP3)	1.7	Crea	0	Everyt	9			 PSW (KO/Note 1/PPAP3) 	1.7	Crea	0	Everyt
	Manufacturing Approval	1.8	Crea	0	Everyt	1	È.		Manufacturing Approval	1.8	Crea	0	Everyt
	Start of Agreement - SOP (1.9	Crea	0	Everyt		ų –		Start of Agreement - SOP (1.9	Crea	0	Everyt
🖨 P	LS PHASE 1 - Program Relea	2	Crea	0	Everyt			Ę	PLS PHASE 1 - Program Relea	2	Crea	0	Everyt
¢	Manage the Project Tasks	2.1	Crea	0	Everyt		4		Manage the Project Tasks	2.1	Crea	0	Everyt
	 Project Communication 	2.1.1	Crea	0	Everyt				 Project Communication 	2.1.1	Crea	0	Everyt
	Project Communication I	2.1.2	Crea	0	Everyt				 Project Communication I 	2.1.2	Crea	0	Everyt
	Project Communication I	2.1.3	Crea	0	Everyt				 Project Communication I 	2.1.3	Crea	0	Everyt
	Project Management / A	2.1.4	Crea	0	Everyt				Project Management / A	2.1.4	Crea	0	Everyt
	Project Kick-Off by custome	2.2	Crea	0	Everyt				Project Kick-Off by custome	2.2	Crea	0	Everyt
	Project Kick-off MEM - PRF	2.3	Crea	0	Everyt				Project Kick-off MEM - PRF	2.3	Crea	0	Everyt
	Kick-off meeting at customer	2.4	Crea	0	Everyt				Kick-off meeting at customer	2.4	Crea	0	Everyt
e	Product Design Phase Activ	2.5	Crea	0	Everyt				Product Design Phase Activ	2.5	Crea	0	Everyt
	Methode recieves all de	2.5.1	Crea	0	Everyt				Methode recieves all de	2.5.1	Crea	0	Everyt
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	Cuetomar faadhack and	253	Crea	n	Event	~			Cuetomar faadhack and	253	Crea	n	Event
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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 standard structure	o create	project with a
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

Projects Programs	Project Templates	Projects Summary							
Project Templates Filter: Active									
*	💌 🕑 📮 🛄 - 闘 = 📑 🖉 🏹 🔮 🧱 🔆 -								
🗌 Name 🔺	Estimated Duration		Owner	Status	Description				
CN Engineering Template		69.0 Days	Test Everything	Active	CN Engineering Templat				
CN Process Template		67.0 Days	Test Everything	Active	CN Process Template				
CN Supplier Template		67.0 Days	Test Everything	Active	CN Supplier Template				
DPLS - Template		443.0 Days	Test Everything	Active	PDPLS - Master Templa				
🗆 🔊 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,

	 ▼ Collaboration and Approvals 	-	Pro	jects l	Programs	Projects	Summar	у	Project	Templat	es	Portfolios
	Home Change Management User	(Proje	ct Templat	tes Filter:Act	· ·		-		76) [=	₫ ій т
	Home Manufacturing		Nar	me 🔺		Estima	ted Dura	tion			Own	er
(Home Project Lead	[- 1	APQP - Te	emplate				90	.0 Days	Test	Everything
	Nome REQ User]	- 1	CN Engine	eering Templa	te			69	.0 Days	Test	Everything
	Home	[- 1	CN Proces	ss Template				67	.0 Days	Test	Everything
	I 0											
				*								

Select icon to create a new template

Step 2 Project Administrator has to define name and description

luct	Create Project Template
	😪 🔆 -
	Fields In red Italics are required
	Туре
	Project Template
te	Name
g Te	
mal	Policy
mpi	Project Template V
mpl	Description
mpla	
ate	
ate	.::
Co	Base Currency
	Euro 🖌
	Originator Test Everything
>	Done
ects	Done

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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.

 Collaboration and Approvals 	Projects Programs Projects Summary	Project Templates
Home Change Management User	Project Templates Filter:Active	1 📭 🔽 🏹 🚱 🏾
Home Manufacturing User	Estimated Duration	n Own
Home Project Lead	APQP - Template	90.0 Days Test
Home RFQ User	CN Engineering Template	69.0 Days Test
Home	CN Process Template	67.0 Days Test
Issues Summary	CN Supplier Template	67.0 Days Test
Shortcuts	Component Template	195.0 Days Laur
Collections		

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
	Туре
	Project Template
(Name PC Clone Of CN Engin
	Rolicy
	Project Template
	Description
(Description CN Engineering Template
(Description CN Engineering Template Base Currency
(Description CN Engineering Template Base Currency Euro
(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,

 Collaboration and Approvals 		Projects Programs Projects	Summary Project Templates
Home Change Management User		Project Templates Filter:Active	·
Home Manufacturing User	Ш	Name ▲	Estimated Duration
Home Project Lead		APQP - Template	90.0 E
Home RFQ User		CN Engineering Template	69.0 E
Home		CN Engineering Template cloned	69.0 E
Issues Summary		CN Process Template	67.0 E
Shortcuts		CN Supplier Template	67.0 E
Collections		Cor CN Supplier Template	195.0 E
▼ Utilities		PDPLS - remplate	571.0 Г

Project template information is shown in a new window.

Drop images here CN Supplier Terr	nplate CN Supplier Template te (69	State : Ac Owner : Tes Modified : 10	tive Inactive t Everything 0/19/2015 6:16:44) 4 PM							
CN Supplier Template	Actions - Edit - Type	No		A A A A A A A A A A A A A A A A A A A	- -	- =-	7 1	1 🔆 -			
Bookmarks							Estimated				
Budget	Task Name	Task Type	ld	Dependency	Ð	State	Estimated Du	Task required	Project Role	?	Level
Folders	🖃 🖻 😭 CN Supplier Templat	Project Te				Active	67.0 Days				
History	∓ → 🔲 🏹 Administrative a	Task	1		2	Create	1.0 Davs	Optional			1
Lifecycle						0					
Properties	🛨 🗕 📄 🏹 Components/Sw	Task	4		0	Create	1.0 Days	Optional			2
Questions	🖶 🗕 📄 🖓 Releasing Proce	Task	6		0	Create	59.0 Days	Optional			3
Resource Plan Template	🖃 🔶 🗐 🕄 Closure of CN - N	Task	18	17:FS+0.0 d	0	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

e DPPLS - Master Template State : Active I Inacti Owner : Test Everything Modified : 6/1/2015 4:40:28 P	M						〈合	2
Actions - Edit - Task III - Edit - 80	/ 🚠 💑 ·	- -	11 · 📃 🧷	77 📰 🔆	Estimated			
Task Name	Task Type	ld	Dependency	State	Estimated Du	Task required	Project Role	? Level
I I I I I I I I I I I I I I I I I I I	Project Temp			Active	443.0 Days			
	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:FS+0.0 d	Create	0.0 Days	Optional		1.2
■ → □ 🖗 Parts from 1st Tooling - FOT's (RDV0/VFF)	Milestone	4	55:FS+0.0 d,69:	Create	0.0 Days	Optional		1.3
	Milestone	5	127:FS+0.0 d	Create	0.0 Days	Optional		1.4
■ →] Plant Trial (PT/PVS/BMG/C-Serie) 1	Milestone	6	135:FS+0.0 d	Create	0.0 Days	Optional		1.5
- → 🗌 🖻 Plant Trial (PT/0-Serie/Note 3/D-Serie/PPAP1)	Milestone	7	143:FS+0.0 d	Create	0.0 Days	Optional		1.6
■ → 🗌 🗭 PSW (KO/Note 1/PPAP3)	Milestone	8	110:FS+0.0 d	Create	0.0 Days	Optional		1.7
	Milestone	9	104:FS+0.0 d	Create	0.0 Days	Optional		1.8
■ →	Milestone	10		Create	0.0 Days	Optional		1.9
■ → □ ♥ PLS PHASE 1 - Program Release and Concept	Phase	11		Create	360.0 Days	Optional		2
■ → □ Ø Manage the Project Tasks	Task	12		Create	360.0 Days	Optional		2.1
🖃 🔶 📄 陀 Project Communication External	Task	13		Create	300.0 Days	Optional		2.1.1
🖃 🔶 🔲 😨 Project Communication Internal - Core tea	Task	14		Create	360.0 Days	Optional		2.1.2
🗆 - 🗖 🕾 Broject Communication Internal - Service f	Took	45		Croato	260.0 Dava	Ontional		0.4.0

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

PDPLS - Template	Actions - Edit - 🖉 🚠 🏭 - 📑 -
Bookmarks	Name
Budget	- PDPLS - Template
Folders	
History	
Lifecycle	
Properties	⊕ 🔲 🗁 03_Open Issues Deck
Questions	🕀 🔲 🗁 04_Customer Input Requirements
Resource Plan Template	🕀 🔲 🗁 05_Program Budget
	🛨 🗐 🗁 06_Program Timing
	🛨 🔲 🗁 09_Quality Planning
	🕀 🕅 🗁 10_Program Review
	💽 🖻 🎦 12_Manufacturing Records

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.

PDP	LS - Template Create New
	*-
Fleids Ir	n red Italics are required
Туре	
Wor	kspace Folder
Nam	e
Polic	y
Work	kspace Vaults 🗸
Desc	cription
Inho	rit Access
Ye	S
ONo	
	Apply Done Cancel

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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 P Workspace Folder (au	Open Issues Deck	State Owne Modif	Exists Test Everything Everything : 10/14/2015 2:05:12 PM
03_Open Issues Deck	Edit 🞇 🕇		
Discussions	Name		03_Open Issues Deck
Basic Information	Policy		Workspace Vaults
	Description		Open Issues Deck
	Originator		Test Everything
	Originated		Sep 13, 2015
	Inherit Access		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

Drop Images here PDPLS - Templa	ate (Ver 2) PDPLS - Template (Ver 2) State	State : Owner Modifie	Activ : Josep d : Sep	 Inactive Inactive A Zammit A Zorra 3:29:43 Plane 	м			
PDPLS - Template (Ver 2)	Actions 🗸 Edit 👻 🖉 🔜 🕰 🕻	•	¢	- 🔳 🛃 💎	' () 🛒 🔆 -			
Bookmarks	□ Name ▲	Ť		Туре	Document Type	Document Approver Role	Title	Action
Budget	PDPLS - Template (Ver 2)			Project Templ				
History	C D1_Form Team			Workspace F				2
Lifecycle	02_Phase Sign Off			Workspace F				2
Properties	🖃 🔲 🗁 03_Open Issues Deck			Workspace F				2
Questions	🖃 🔲 🗁 04_Customer Input Requirem	¢		Workspace F				2
Resource Plan Template	Contract SOW			Workspace F				2
	Letter of Intent			Workspace F				2
	Product Requirements			Workspace F				2
	Production Ramp Up			Workspace F				2
	Production Tooling Kick Of	f		Workspace F				2
	Purchase Orders			Workspace F				2
	🖃 🗖 🗁 05_Program Budget			Workspace F				2
								_

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"

	Modifie	ed : Sep 7, 2017 3:29:43	PM				
* 🛃 🛃	14	🔁 - 🕽 🖉 🦷	7 🎞	≫?-			
	٢	* Create New Table	view	ent Type	Doci	ume	
ate (Ver 2)		Content View				_	
eam		Role Access View					
Sian Off		Workspace F					
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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.

Actions - Edit -				≣ ⅔-					
				Project Role Access					
□ Name ▲	Owner	Default Us	Inherit	AM Account Manage	CA Cost Analysist	CC Change Coordina	CS Customer Servic	Fin Finance	GM G
🖃 🗋 👔 PDPLS - Template (Ve npl	🕼 Joseph Z			Read	Read	Read	Read	Read	Rea ^
E C 201_Form Team e F	& Joseph Z	Read	Yes	Read	Read	Read	Read	Read	Rea
□ □ □ 02_Phase Sign Off e F	& Joseph Z	Read	Yes	Read	Read	Read	Read	Read	Rea
O3_Open Issues D(e F	♣ Joseph Z…	Read	Yes	Read	Read	Read	Read	Read	Rea
Customer Input e F	Joseph Z	Read	Yes	Read	Read	Read	Read	Read	Rea
Contract SOW e F	Joseph Z	Read	Yes	Read	Read	Read	Read	Read	Rea
E Letter of Intent e F	Joseph Z	Read	Yes	Read	Read	Read	Read	Read	Rea
Product Require e F	♣ Joseph Z…	Read	Yes	Read	Read	Read	Read	Read	Rea
Production Ram e F	🕼 Joseph Z	Read	Yes	Read	Read	Read	Read	Read	Rea
🖃 🗖 🎦 Production Toolir e F	♣ Joseph Z…	Read	Yes	Read	Read	Read	Read	Read	Rea
🖃 🗖 🎦 Purchase Order e F	🕼 Joseph Z	Read	Yes	Read	Read	Read	Read	Read	Rea
🖃 🗖 05_Program Budge e F	🕼 Joseph Z	Read	Yes	Add Remove	Read	Read	Read	Read	Rea
🖃 🗖 🎦 Affordable Cost 'e F	🕼 Joseph Z	Read	Yes	Read	Read	Read	Read	Read	Rea
Currency Rate E e F	♣ Joseph Z…	Read	Yes	Read	Read	Read	Read	Read	Rea
<								83	> Abjects
FILEL ROLE ACCESS VIEW								83	objects

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

Actions - Edit - 🗶 🚠 🖧 -	. · .		71	≣ ‰-					
Mass Update		*						Save	
	Project Role Access								
Name .	Owner	Default Us	Inherit	AM Account Manage	CA Cost Analysist	CC Change Coordina	CS Customer Servic	Fin Finance	
DPLS - Template (Ve npl	🖨 Joseph Z			Read	Read	Read	Read	Read	
D D 01_Form Team e F	Joseph Z	Read	Yes	Read	Read	Read	Read	Read	
Description: De	Joseph Z	Read	Yes	Read 🗸	Read	Read	Read	Read	
D 🗁 03_Open Issues D(e F	Joseph Z	Read	Yes	Add Add Remove	Read	Read	Read	Read	
Customer Input e F	🕼 Joseph Z	Read	Yes	None	Read	Read	Read	Read	
E Contract SOW e F	🕼 Joseph Z	Read	Yes	Read Read Write	Read	Read	Read	Read	
E C Letter of Intent e F	🖨 Joseph Z	Read	Yes	Remove	Read	Read	Read	Read	
🖃 🔲 🗁 Product Require e F	Joseph Z	Read	Yes	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, ...)



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		
Issues	Checklists Deliverables	
Collaboration		▽ \ \ \ \ \
Dependencies		
Properties	Name	Responsible Description 🔺
Questions	Gate 1 - Review and Sign off	Gate 1 deivierable as disc
Routes & Approvals		01. Program Manager assi
Activities Estimation		02. Preliminary Cross-fun
		03. Customer Inputs:
		04. Commercial and Progr
		05. Deviation checklist
		06. Purchase Orders
		07. Program Funding Rele
		08. Design Goals underst
		09. Baseline B.O.M. relea

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

Gate 1 - Review and Sign	
Issues	Checklists Deliverables
Collaboration	
Dependencies	
Properties	Name
Questions	Gate 1 - Review and Sign of

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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

Gate 1 - Review and Sign	
Issues	Checklists Deliverables
Collaboration	Action -
Dependencies	
Properties	
Questions	Add Checklist Item
Routes & Approvals	Delete
Activities Estimation	🔹 🛌 🖹 CH 02 Prolimina

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						
🖉 蛊 蟲- 🎟- 💭 🏹 😫 🇮 🔆-						
Name	Responsible	Description	Response Type	Comments		
E CH_03. Customer Inputs:		03. Customer Inputs:	·			
🛨 📴 CH_Logistics and Volume requireme		Logistics and Volume re				
主 📴 CH_Component Technical Specificat		Component Technical S				
🛨 🔞 Cl_Customer Manufacturing Require	Account M	Customer Manufacturing	N/A 1 2 3 4 5			
重 🔞 Cl_Key Customer contact list availab	Account M	Key Customer contact lis	N/A 1 2 3 4 5			
🛨 豫 Cl_Project Timing Plan:	Account M	Project Timing Plan:	N/A 1 2 3 4 5			
重 豫 Cl_Reliability and Quality Goals defin	Account M	Reliability and Quality Go	N/A 1 2 3 4 5			
🛨 🔞 Cl_Volume and Mix (avg/max product	Account M	Volume and Mix (avg/max	N/A 1 2 3 4 5			
\$	(8 objects		

New checklist

<u>Step 1</u> 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)

Create Checklist
& % -
Fields In red Italics are required
Type Checklist
Name
Description
Done Cancel

Checklist item

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

Checklists	Deliverabl	es
Action 🗸 🖉	æ	_ -
Create New (Checklist	
Add Checklis	t Item	Sign off
Copy From		n Manager as
Delete		in Manager as
		yram Manager a
🗎 🗎 🤇	CH_02. Prelin	ninary Cross-fur
	CI_02. Prel	iminary Cross-fi
🖻	CH 03. Custo	mer Inputs:
	CH Comp	onent Technical

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

🛃 🎌 -	
Fleids in red Italics	are regulred
Туре	
Checklist Ite	m
Name	AutoName
Description	
Response T	.::
Response T	
Description Response T Yes No Yes No	irpe
Response T Yes[No Yes]No MakejBuy	ype
Response T Yes No Yes No Make Buy Approved C	ipe
Response T YesiNo YesiNo Make Buy Approved[C White Red]G	ype
Response T YesjNo YesjNo MakejBuy Approved[C WhitejRed]G 1 2 3 4 5	.:i wpe onditionally Approved[Not Approved reen[Blue]Yellow

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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 of a Checklist item using the edit command				
🗶 🍌 🎝 - 🗔 - 🔜 🖓 🖗	2 🗐 🔆 -			
Mass Update				
Name	Responsible	Description	Response Type	(
CH_01. Program Manager assigned		01. Program Manager assigned		
r 🕞 豫 CI_01. Program Manager assigned	PM Director	01. Program Manager assigned	N/A 1 2 3 4 5	P

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

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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
- V 🕅 Test - Template	Project Template
🖃 🔶 🛅 Tool manufacturer kick-off	Task
E Control design design reviews and approval from Customer	Task
→ ♥ ♥ <u>1-0000706</u>	Gate

From the Actions menu

Test - Template	Actions - Edit - Type
Bookmarks	
Budget	Task Name
Folders	- 🗆 🖈 Test - Template
History	🗆 🕞 🛱 Teel manufacture
Lifecycle	
Properties	🖃 🔶 🔲 🖸 Tool design desig
Questions	→ ▼ T-0000706

Select Create Question

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Test - Template	Actions - Edit - Type			
------------------------	-----------------------			
Bookmarks	Copy Schedule			
Budget	Duration Keywords			
Folders	Task Above			
History	Sub Task			
Lifecycle	Copy To Selected Task			
Properties	Create Question			
Questions	Add/Remove Dependency			
Resource Plan Template	Delete Selected			

- 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		
	Bookmarks			
	Budget	Task Name	Task Type	ld
	Folders	🖃 🔲 🍙 Test - Template	Project Template	
	History	🖃 🔸 🔲 🗊 Tool manufacture	Task	
	Lifecycle	🖃 🔸 🔲 😰 Tool design desig	Task	
(Questions	→ □ ✓ T-0000706	Gate	
	Resource Plan Template			

and the command Create from the menu Actions

Drop	Test - Template	Test - Template	State :
images here	Project Template		Owner :
L			Modified
Test - Tem	iplate	Actions 🗸 🔺	A 10 - 10 - 10 - 10 - 10 - 10 - 10 - 10
Bookmark	<u>s</u>	Create	
Budget		Delete	
Folders		Assign Tasks	
History		Remove Tasks	

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				
-				\bigcirc			
Actions - 💌 🖋 🔜 🍇 - 🛄 -	📮 📰 - 🔜 📲 🏹	7 ⊯ %∙					
Name	Туре	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	Туре	Question	State						
🖃 💼 📸 Test - Template	Project Template	Test - Template	Active						
\pm 📄 🎇 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 Save		
	🕂 🗹 🍓 🛆 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

Test - Tem	plate	Test - Tem	plate State :	Active	Inactive						
Images 2 Project T	emplate		Owner : T	est Everyth	ing						
			Modified :	1/22/2016	2:14:22 PM						
Test - Template		Actions -	Edit - Type	N	•	E		A	- -		. 🖉 🔽 🗐
Bookmarks			11 TASK							Estimated	
Budget		Task Nan	ne	Task	Type Id	Dep	endend	Ð	State	Estimated Du	Task required
Folders		⊡ra≫ Te	st - Template	Proiec	4				Active	26.0 Days	
History			or romplato	110,00				\cap		20.0 0 0,0	
Lifecvcle		-	🔄 Tool manufacti	ur Task		1		3000	Create	1.0 Days	Optional
Properties		-	🝸 Tool design de	si Task		2 1: F	S+0.0 d	0	Create	25.0 Days	Optional
Questions											
Drop images here Task (89145216 Test - Template	er kick-off 64587 Test - Te	Supplier Timi confirmation	ing plan	State : Crea Owner : Test I Modified : 1/2	ete + Assign Everything 7/2016 12:29:28 I	PM					
Tool manufacturer kick-off	Deliveral	bles									
Assignees	Actions -	-	🖪 - 🖉 🖓 🌘	3 ⅔-							
Issues		🕀 Name 🛆			Title	R	ev Ver	Туре	Actions		
Deliverables	0/1	DOC	-0000163		Tool spec	0	1	Document	M ▲ & G		
Dependencies	0/1	DOC	-0000185		Tool spec	0	1	Document	M 🕹 🚯 🗔		
Properties	0/1	🛅 Tool r	new doc-105216469460	6	Tool new doc	0	1	Document	M 🕹 🖨 🕞		
Questions											
Routes & Approvals											

The Deliverables Action menu contains command to create new document

Tool manufacturer kick-off	Deliverab.>s						
Assignees	Actions -	🖪 - 🖉 🏹 😪 %	·-				
Issues	Create New		Title	Rev	Ver	Туре	Actions
Deliverables	* Document	163	Tool spec	0	1	Document	N 🕹 🔂 🖟
Dependencius	Add Existing	185	Tool spec	0	1	Document	a 🕇 🖗 🗗
Properties	- Pemove	c-1052164694606	Tool new doc	0	1	Document	🔊 🛓 🕼 🕼
Questions	Download						
Routes & Approvals	Checkout Add to Folder						

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
Туре	Document
Policy	Document Release
Title	Tool spec
Description	Tool spec
Access Type	Inherited V
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.

Step 2 of 2: Upload Files		
*	\frown	
File Format	Comments	î
Browse No file selected.		
generic 💌		
Browse No fire selected.		
generic V		
Browse No file selected.		
generic V		
Browse No file selected.		
generic V		
	Previous Done	Cancel

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

Tool manufacturer kick-off	Deliverables					
Assignees	Ac	Actions - 🗔 🔍 - 🐻 - 🖉 🏹 🎇 🔆 -				
Issues						
Collaboration		•	*	Name 🛆		
Deliverables		0/1		DOC-0000163		
Dependencies		0/1		DOC-0000185		
Properties		0/1		1001 now doc 1052164694606		
Questions						
Routes & Approvals						

The system opens a window with the document information.

DOC-0000185 Tool spec Tool spec Document (0) Tool spec	State : Private + In Owner : joseph.zammit Modified : 1/27/2016 12:2	Work	→ Froze	en	
Files	Name	DOC-	000018	5	
File Versions	Revision	0			
Approvals	Туре	Docur	ment		
Revisions	Vault	eServi	ice Prod	duction	
Issues	Title	Tool s	pec		
Routes	Description	Tool s	pec		
Discussions	State	In Work			
Discussions	Owner	Joseph Zammit			
Retention Schedules	Originated	Jan 27, 2016 12:29:24 PM			
Lifecycle	Modified	Jan 27, 2016 12:29:28 PM			
Multiple Ownership	Policy	Document Release			
Access	Document Approver Role				
History	Access Type	Inherit	ted		
Where Used	Document Type				
Classification	Classification Path(s)				
Referenced By	📑 • 📰 • 🔜 🏹	1	*∻-		
	📄 File Name 🔺				Ver
	mylog.log				1

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

DOC-0000185 Tool spec	State : Frozen 🔶 Release	d 🔿 Obsolete		
Tool spec	Owner : joseph.zammit			
Document (0)	Modified : 1/27/2016 12:46:1	1 PM		
Tool spec	≡ •			
Files	Edit Details	-0000185		
File Versions	📥 Download			
Approvals	Generation Checkout	iment		
Revisions	Upload/Check In	vice Production		
Issues	Revise	spec		
155005	Revise With Files	spec		
Routes		ased		
Discussions	M Subschbe	ph Zammit		
Retention Schedules	× Delete This Version	27, 2016		
Lifecycle	Push Subscription	?7, 2016		
History	× Delete All Versions	iment Release		

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

DOC-0000185 Tool spec Tool spec Document (0)	State : Private Owner : joseph.zammi Modified : 1/27/2016 12	In Work + Frozen t 2:29:28 PM
Tool spec	DOC-0000185 : Edit	Details
Files		
File Versions		Elabir In and Baller are sequired
Approvals	Name	DOC-0000185
Revisions	Revision	
Issues	Туре	Document
Routes	Vault	eService Production
Discussions	Title	Tool spec
Retention Schedules		Tool spec
Lifecycle	Description	
Multiple Ownership Access	State	In Work
History	Owner	loseph Zammit
Where Used	Originated	Jan 27, 2016 12:29:24 PM
Classification	Modified	Jan 27, 2016 12:29:28 PM
Referenced By	Policy	Document Release
	Document Approver Role	
	Document Type	~
	Classification Path(s)	

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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

Private	 →	In Work		Frozen		Released		Obsolete
---------	-----------	---------	---------	--------	---------	----------	--	----------

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 <u>Senior User</u> role.

			^
		AM Senior Account Manager	
		CA Senior Cost Analysist	
		CC Senior Change Coordinator	
		CM Senior Change Manager	
		CS Senior Customer Service	
	L	DE Senior Design Engineer	
State	Released	EE Senior Electrical Engineer	
		Fin Senior Finance	
Owner	Joseph Zammit Clear	GM Senior General Manager	
		IP Senior Intellectual Property	
Originated	Jan 27, 2016	LC Senior Lab Coordinator	
	· · · · · · · · · · · · · · · · · · ·	LM Senior Launch Manager	
Modified	Jan 27, 2016	LT Senior Lab Technician	
		ME Senior Manufacturing Engineer	
Policy	Document Release 🔻	MGR Senior Manager	
		OM Senior Operations Manager	
Document Approver		PM Senior Plant Manager	
Role	TE Senior Tooling Engineer	PURCH Senior Purchasing	
NUIC		050 1 0 0 5 1	Ψ.

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

PLS PHASE 1 - Program Re	Actions Edit Type Task Mass Update			t a 🎄	.	•		1 💎 🔳 S	&-			
Bookmarks								Estimated				
Deliverables	Task Name	Task Type	Id	Dependency	Ð		State	Estimated Du	Task required	Project Pole	2	Level
Deliverables Notes		r r	iu .	,	2		otate	7	r rusk required	r	· .	Lever
Dependencies	PLS PHASE 1 - Progr	Phase			0	D	Create	360.0 Days	Optional			
History	🗄 🗕 📄 🖓 Manage the Pro	Task	12	r	0	D	Create	360.0 Days	Optional	r		2.1
Discussions	Project Kick-Off t	Task	17	*	0		Create	0.0 Days	Optional	DE Design Engineer		2.2
Questions	🖃 🗕 🗖 🙆 Project Kick-	Task	18	17:FS+0.0 d	0	D	Create	5.0 Days	Optional	DE Design Engineer		2.3
Project Template Schedule	→ □ ② ◎ Kick-off meel	Task	19	17:FS+0.0 d	0	D	Create	1.0 Days	Optional	U. Launch Manager		24
	🛨 🕂 🗋 🖓 Product Design	Task	20	,	0	D	Create	1.0 Days	Optional		~	2.5
	🔹 🕂 🗋 💟 Process Design	Task	32	r	0		Create	100.0 Days	Optional			2.6
	🛨 🗕 📄 😧 Quality Activites	Task	40	,	0	D	Create	75.0 Days	Optional	r		2.7
	Tooling Purchase	Task	42	r	0	D	Create	5.0 Days	Optional	r		2.8
	= 🗕 🗋 🕑 PLS Gate 1 - Rev	Gate	43	, ,	0		Create	0.0 Days	Optional	٢		2.9
	< >>	<										

Project Role drop down list:

~
Care Teem Nember
Core ream wember
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



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

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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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