



 METHODE ELECTRONICS, INC.


pivotal
Italia

 CDM
TECHNOCONSULTING

Project Users Use Cases

Version	1	Date:	18-April-2016
Status	Template		1

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USR01 Project Task Execution

Purpose	Define and manage and project tasks	Status	Define
Stakeholders	Project Users		
Beginning	Project users receive tasks assigned on Project users dashboard		
Interactions	Project Users can update and complete project tasks		
End	Close tasks and upload deliverables		
Constraints			

A project is a collection of tasks to be performed in a specific sequential order. Project Lead can assign tasks to project members, in order to complete task activities.

To complete the task, the project member has to set the percentage **% Complete** to 100 or enter an Actual Finish Date. Also, project member can complete tasks defining deliverables, like documents, used to provide information immediately available to project lead. The deliverables are defined at task level.

Deliverables can be created from project lead, with no files attached; in this case, the project lead can force the task assignee to enter and complete the task with deliverable defined.

1.1 Tasks Dashboard

The Tasks Dashboard shows the tasks related to the Projects, and the associated information on the status, slip days, icon to manage deliverables, % complete and project related to task

Name	Slip Days	Status	% Complete	Project	Est Start	Estimated Finish Date	Act Finis
<input type="checkbox"/> BOM Concept	88	Assign		RFQ000009-01	Dec 16, 2015	Dec 16, 2015	
<input type="checkbox"/> Engineering Mechanical Res	88	Assign		RFQ000009-01	Dec 16, 2015	Dec 16, 2015	
<input type="checkbox"/> Modification of PCB size/des	86	Active	0%	CN 0000166	Dec 18, 2015	Dec 18, 2015	
<input type="checkbox"/> PLS PHASE 4 - Production L	83	Active	0%	P1	Oct 15, 2015	Dec 23, 2015	
<input type="checkbox"/> PFMEA+ QCP for each tool s	69	Active	0%	Tool1	Oct 23, 2015	Jan 12, 2016	
<input type="checkbox"/> Engineering Mechanical Res	60	Assign		RFQ-0000016-03	Jan 25, 2016	Jan 25, 2016	
<input type="checkbox"/> BOM Concept	60	Assign		RFQ-0000016-03	Jan 19, 2016	Jan 25, 2016	
<input type="checkbox"/> BOM Concept	56	Assign		RFQ-0000017-01	Jan 25, 2016	Jan 29, 2016	
<input type="checkbox"/> Engineering Mechanical Res	56	Assign		RFQ-0000017-01	Jan 29, 2016	Jan 29, 2016	

Critical tasks (those which cannot be delayed without affecting the project finish date) are identified in red

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Tasks Filter: Assigned Tasks									
Name	State	Slip Days	Documents	Issues	% Complete	Project	Est S	Est E	Act F
<input type="checkbox"/> BOM Concept	Assign	88	0	0		RFQ000009-01	Dec 1		
<input type="checkbox"/> Engineering Mechanical Res	Assign	88	0	0		RFQ000009-01	Dec 1		
<input type="checkbox"/> Modification of PCB size/des	Active	86	1	0	8	CN 0000166	Dec 1		
<input type="checkbox"/> PLS PHASE 4 - Production L	Active	83	0	0		P1	Oct 1		
<input type="checkbox"/> PFMEA + QCP for each tool a	Active	69	0	0	8	Tool1	Oct 2		
<input type="checkbox"/> Engineering Mechanical Res	Assign	60	0	0		RFQ-0000016-03	Jan 1		
<input type="checkbox"/> BOM Concept	Assign	60	0	0		RFQ-0000016-03	Jan 1		
<input type="checkbox"/> BOM Concept	Assign	56	0	0		RFQ-0000017-01	Jan 1		
<input type="checkbox"/> Engineering Mechanical Res	Assign	56	0	0		RFQ-0000017-01	Jan 1		

Columns:

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

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

Slip day: delay days

: number of documents related to the task; selecting the link, the system opens a window with task deliverables

: number of issues related to the task; selecting the link, the system opens a window with task deliverables

% completed: the percentage of completion of the task

Project: the task is referred to the project listed here; selecting the link, the system opens a window with project information

Est start: estimated start of the task

Est end: the estimated end of the task

Act finish: end date of the task

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1.2 Issues

In this tab are listed all the issues assigned to the user in ACTIVE state.
See chapter Open Issue Deck.

												Estimated	Actual
<input type="checkbox"/> Name	Edit	Reported Against	Classification	Description	Visibility	Domain	Action Taken	Priority	% Complete	Approver	Finish	Start	
<input type="checkbox"/> ISS-0000174		0 000000010	Issue - A probl...	test	Internal	Design		Low	0		Feb 29, 2016		
<input type="checkbox"/> ISS-0000180		0 Alpha Test	Risk - Probabil...	test	Internal	-		Low	0		Feb 22, 2016	Feb 16, 2016	

1.3 Approval Tasks

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

<input type="checkbox"/> Name	Title	Instructions	Due Date	Type	State	Context	Workspace
<input type="checkbox"/> IT-0000242	IT-0000242 CA-0000262	kindly approve	Jan 10, 2016	Comment	Assigned	R-00002...	1
<input type="checkbox"/> IT-0000277	Approval Gate Gate 1 - Review and Sign off	Check Gate c...	Feb 16, 2016	Approve	Assigned	R-00002...	1
<input type="checkbox"/> IT-0000287	Approve PD Development	Check task c...	Feb 17, 2016	Approve	Assigned	R-00002...	1

1.4 Approval Issues

In this page are listed all the issues that have to be approved by the user.
See chapter Open Issue Deck.

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

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1.5 Projects

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

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

Tasks Issues Approval Tasks Approval Issues Projects My Calendar Messages									
Projects Filter:Active									
Actions									
Name	Current Phase	Type	Status	Owner	Estimated Finish Date	Act Finish	Created Date	Program	Description
<input type="checkbox"/> Test prj company		Project Space	Create	Joseph Zammit	Mar 8, 2018		Feb 25, 2016		Test prj company
<input type="checkbox"/> CO-0018751	Administrative and...	Project Space	Assign	Joseph Zammit	May 31, 2016		Feb 23, 2016	CN FORD 2016	test
<input type="checkbox"/> Test Export	PLS PHASE 1 - Pr...	Project Space	Active	Joseph Zammit	Feb 18, 2016		Feb 11, 2016		Test Export

1.6 My Calendar

The My Calendar tab provides a view of assignments (WBS tasks, meetings, route tasks, risks, and issues) that are scheduled for the signed-in user, shown in a timeline by Day, Week, or Month

PowerView									
Projects	Project Templates	RFQs	Tasks	Meetings	Decisions	My Calendar	Discussion	Issues Summary	
Day	Week	Month							
	Show	Date	Submit						
		Date Objects							
		1-Jun-2016 - 30-Jun-2016							
		Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Order
W-24-2015		7	8	9	10	11	12	13	0
									2
W-25-2015		14	15	16	17	18	19	20	3
									4
W-26-2015		21	22	23	24	25	26	27	5
									6
W-27-2015		28	29	30	1 Jul	2	3	4	7
					Engineer..				8
					Manufact..				8
					Engineer..				8
					Lab Test..				8
					8More Objects				8
W-28-2015		5	6	7	8	9	10	11	9
				Project ..					10

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1.7 Messages

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

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

Messages

Create Message Check Mail Delete Selected 

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

Columns:

The Messages page shows the following information:

: the icon shows if message has been read or not

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

: the icon is shown if the message has an attachment

From: message originator

Received: date when message is sent

Toolbar icons:

Create Message Check Mail Delete Selected 

Create Message Create new message

Check Mail Update mail list

Delete Selected Delete selected messages

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1.8 Working on Tasks

Using tasks dashboard, users are able to modify the % complete of task, in order to notify the project lead that the task is active. To update the % complete, the task assignee can change the percentage modifying the value directly in tasks table.

Tasks | Filter: Assigned Tasks

Name	Slip Days			State	% Complete	Project	Est Start
<input type="checkbox"/> BOM Concept	88	0	0	Assign	<input type="text"/>	RFQ000009-01	Dec 16, 2015
<input type="checkbox"/> Engineering Mechanical Res	88	0	0	Assign	<input type="text"/>	RFQ000009-01	Dec 16, 2015
<input type="checkbox"/> Modification of PCB size/des	86	1	0	Active	<input type="text" value="25"/>	CN 0000166	Dec 18, 2015
<input type="checkbox"/> PLS PHASE 4 - Production L	83	0	0	Active	<input type="text"/>	P1	Oct 15, 2015
<input type="checkbox"/> PFMEA + QCP for each tool a	69	0	0	Active	<input type="text" value="25"/>	Tool1	Oct 23, 2015
<input type="checkbox"/> Engineering Mechanical Res	60	0	0	Assign	<input type="text"/>	RFQ-0000016-03	Jan 25, 2016
<input type="checkbox"/> BOM Concept	60	0	0	Assign	<input type="text"/>	RFQ-0000016-03	Jan 19, 2016
<input type="checkbox"/> BOM Concept	56	0	0	Assign	<input type="text"/>	RFQ-0000017-01	Jan 25, 2016
<input type="checkbox"/> Engineering Mechanical Res	56	0	0	Assign	<input type="text"/>	RFQ-0000017-01	Jan 29, 2016

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1.8.1 Tasks Details

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

Drop images here

PFMEA + QCP for each tool and ...

Task (5214455021092...)

Tool1 Tool1

State : Assign ← Active → Review

Owner : Test Everything

Modified : Apr 18, 2016 11:39:48 AM

PFMEA + QCP for each tool...

Assignees

Issues

Collaboration

Deliverables

Dependencies

Properties

Routes & Approvals

Name	Type	Id	Dependency	Duration	Start Date	End Date	Estimated
<input type="checkbox"/> PFMEA + QCP for eac	Task	2:SS+0.0 d		60.0 Days	Oct 23, 2015	Jan 12, 2016	0

1.8.2 Categories menu

[Development and Go Live](#)

[Assignees](#)

[Issues](#)

[Collaboration](#)

[Deliverables](#)

[Dependencies](#)

[Properties](#)

[Routes & Approvals](#)

Name of the task: breakdown structure of the task (see chapter Edit Task Details)

Assignees: users assigned to the task (see Assigning and Delegating Tasks)

Issues: issues related to the task (see Open Issue Deck)

Collaboration: list of decisions, discussions and meetings related to the task

Deliverables: the list of documents or items needed to complete the tasks (see Working with Deliverables).

Dependencies: allows user to define the dependencies of the task in relation with other tasks (Start to Start / Finish to start / Finish to Finish / Start to Finish) and the slack time. i.e.: 3:FS+5.0d= the task is dependent on task ID3. The dependency is Finish to Start. The task 3 must finish before the task can start. There is a slack time of 5 days.

Properties: information about the task

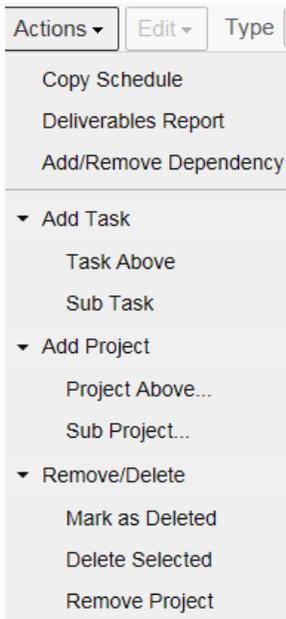
Routes & Approvals: lists of all routes or approvals related to the tasks (see Tasks Approval)

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1.8.3 Toolbar icons



Actions provides several commands related to tasks:



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

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

Delivery report: shows a delivery report of the selected task

Name	Id	Est. End Date	State	%	Assignee
<input checked="" type="checkbox"/> PLS PHASE 4 - Production Launch	36	Jun 1, 2016	Active	2.0	matthew.spiteri
<input checked="" type="checkbox"/> Other activities	38	Jun 1, 2016	Assign	0.0	Johann
<input checked="" type="checkbox"/> Compile and submit all ANPQP docu	39	Jun 1, 2016	Assign	0.0	matthew.spiteri

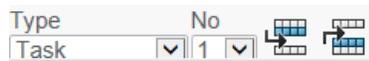
Add/Remove Dependency: allows users to manage the internal or external dependencies of the selected task

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

Add project: allows users to add the selected task to an above or sub project

Remove/Delete: allows to

- mark the selected task as deleted
- delete the selected task permanently
- disconnect the selected task from a project



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



Remove tasks: allows users to delete select tasks



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



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

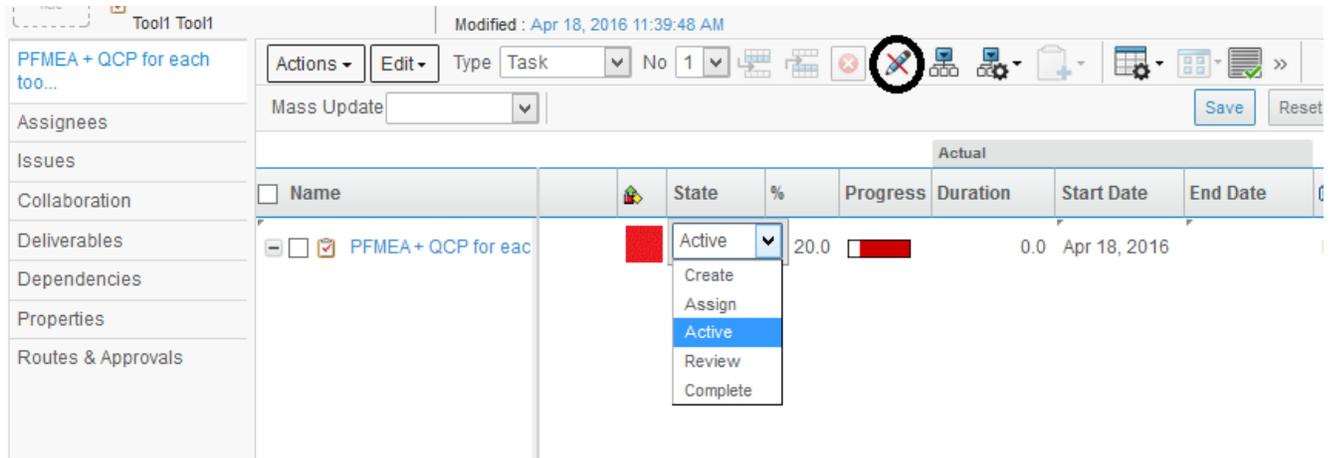
Other icons are common to other toolbars (see Home toolbar)

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1.8.4 Edit Task Details

To complete the task, the project member, sets the percentage **% Complete** to 100 or enter an Actual Finish Date. Changing the % Complete value for a task changes the lifecycle state of the task, its parent task or project, and its subtasks.

User can also change the task state to Review and Complete.



If Project Lead has defined an approval process, the user is able to move the state to Review; to complete the task, an approver will be notified.

If Project Lead has defined a mandatory deliverables, the user is able to move the state to Review only if all deliverables has been released.

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1.8.5 Assigning and Delegating Tasks

The Project Lead and the Task owner can assign the task to other users or change assignee role

Select a task and select Assignees command:

- Use Add command to assign other users
- Use Remove Selected to remove assignees; the task assignees defined by Project Lead cannot be removed.
- Use Assign as Task owner to change task ownership (change the ownership doesn't change the task assignee)
- Use the Edit command to change the allocation
- Use the save button to confirm the changes

The screenshot shows a software interface for task management. At the top, there are buttons for 'Assign', 'Active', and 'Review'. Below this, the task details are shown: 'Task (331444733783...)' with owner 'joseph zammit' and a 'Mass Update' dropdown menu. A toolbar contains several icons, with 'Add', 'Remove Selected', 'Assign as Task...', and 'Save' circled in blue. On the left, a sidebar menu has 'Assignees' circled in blue. Below the toolbar is a table with the following data:

User Name	Email	Company	Assignee Role	% Allocation
<input checked="" type="checkbox"/> Zammit, Joseph	Joseph.Zammit@methode-eur.com	METHODE ELECTRONICS	Task Assignee	100.0

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1.9 Working with Deliverables

A deliverable can be an external document, any item already added to a project folder, or any existing item in the database. Task list and Project WBS Schedule tables contain a column that indicates the number of the uploaded documents.

<input type="checkbox"/> Name	Slip Days		State	% Complet
<input type="checkbox"/> Project Kick-Off by custom	0	0	Active	<input type="text" value="0"/>
<input type="checkbox"/> Kick-off meeting at custom	0	0	Active	<input type="text" value="0"/>
<input type="checkbox"/> Design Freeze	0	0	Assign	<input type="text" value="0"/>
<input type="checkbox"/> Assembly line location rev	0	0	Assign	<input type="text" value="0"/>

If a task was created with deliverables inherited from project template or defined by Project Lead, task list shows also the documents contained in the task definition.

Tasks Filter: Assigned Tasks									
<input type="checkbox"/> Name	Slip Days		State	% Complete	Project	Es			
<input type="checkbox"/> Lab Testing and Equipment	30	0	Assign	<input type="text" value="0"/>	RFQ0...	De			
<input type="checkbox"/> Supplier Nomination	29	0	Assign	<input type="text" value="0"/>	Test S...	De			
<input type="checkbox"/> Tool manufacturer kick-off	3	2	Assign	<input type="text" value="0"/>	Test 1 ...	Ja			
<input type="checkbox"/> Manufacturing Resources	0	0	Assign	<input type="text" value="0"/>	RFQ-...	Fe			
<input type="checkbox"/> Design Freeze	0	0	Assign	<input type="text" value="0"/>	Test S...	Ap			
<input type="checkbox"/> PLS PHASE 3 - Production C	0	0	Assign	<input type="text" value="0"/>	Test S...	Ju			

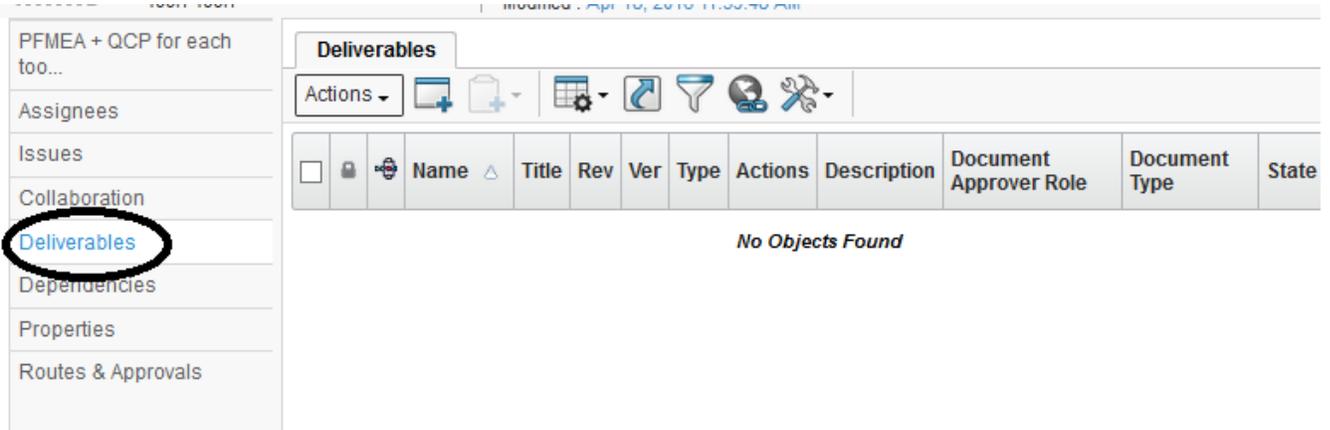
Clicking on the link (the number of deliverables) the system opens the task deliverables form

<input type="checkbox"/> Tool manufacturer kick-off	3	2
---	---	---

Deliverables												
<input type="checkbox"/>			Name	Title	Rev	Ver	Type	Actions	Description	Document Approver Role	Document Type	State
<input type="checkbox"/>	0/1		Tool new doc-333468774878	Tool new doc	0	1	Document		Tool new doc	DE Senior Design Engineer	Product Engineering	Private
<input type="checkbox"/>	0/1		Tool spec-313468774613	Tool spec	0	3	Document		Tool spec updated	TE Senior Tooling Engineer	Quality Engineering	Private

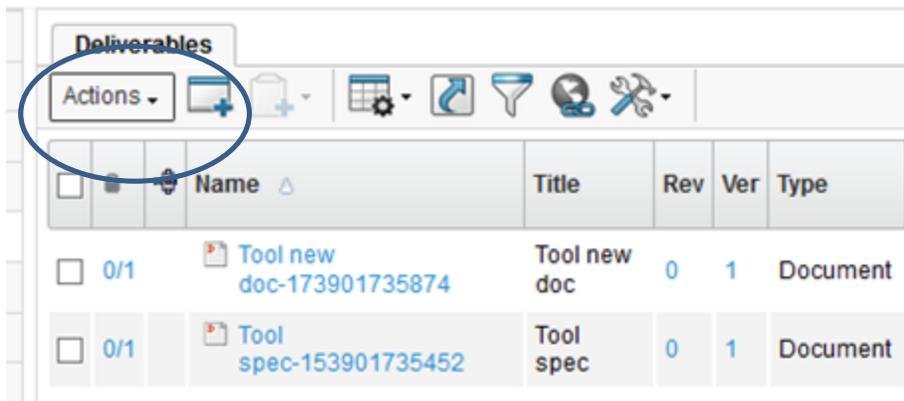
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User can also click on task name from tasks dashboard, then select the command Deliverables



1.9.1 Create New Document

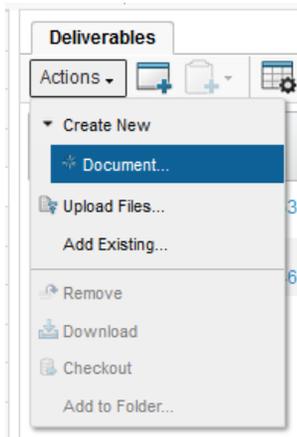
All the Task assignees (also additional assignees, not only user assigned by the Project Lead) can create new documents, add objects already existing, checkout and lock the document in order to upload new versions using the command of the Actions menu.



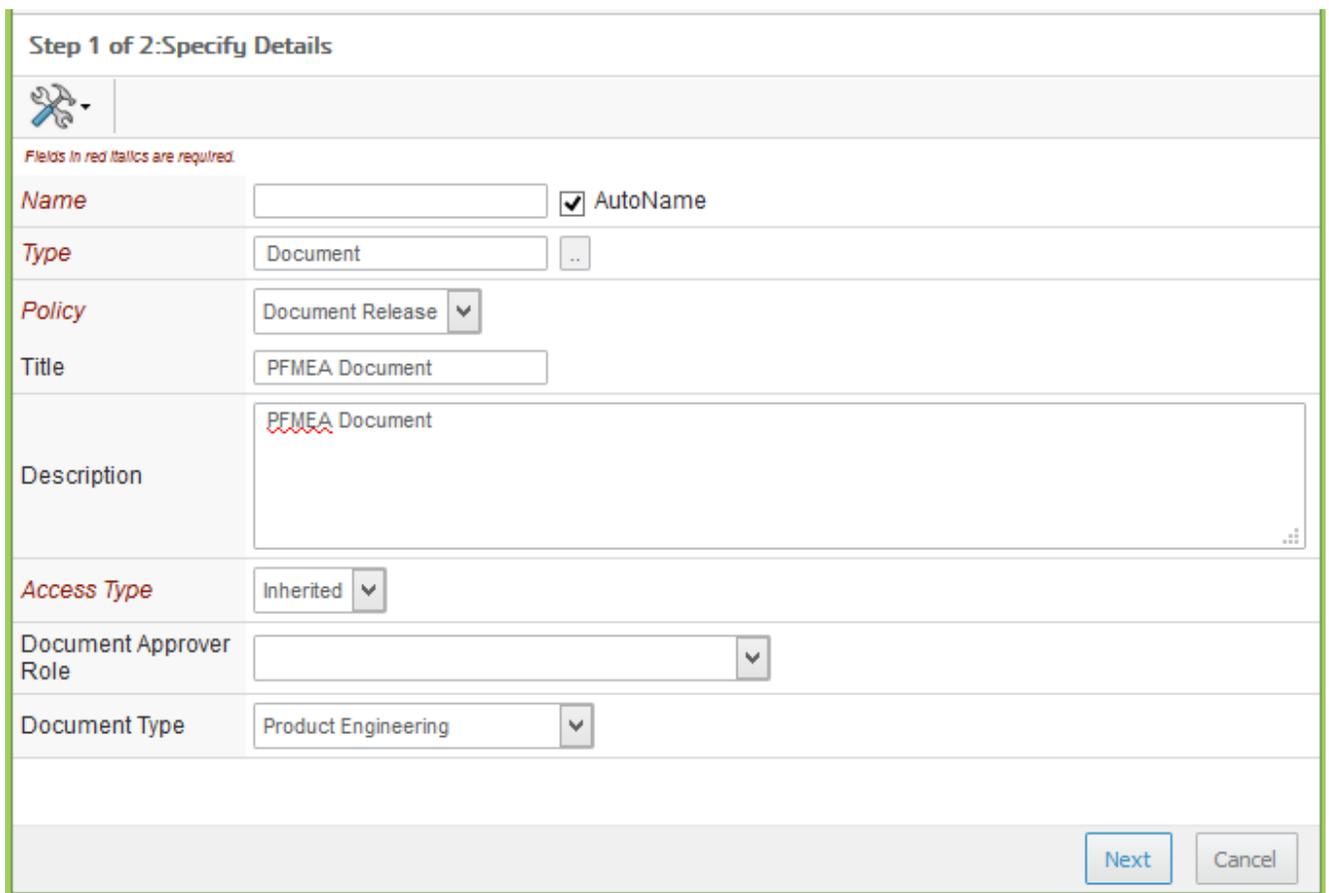
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1.9.1.1 Create New Document

Using table Deliverables, user can select the Create New --> Document command from the Actions menu



The system opens a new window that allows the selection of the name (auto naming is available), the type of the document (default value is Document), title (a short description used in deliverable stable), description and document type (used to classify the document)

A screenshot of a 'Step 1 of 2: Specify Details' form. The form has a header with a wrench icon and the text 'Fields in red italics are required.' Below this are several fields: 'Name' with a text box and a checked 'AutoName' checkbox; 'Type' with a text box containing 'Document' and a dropdown arrow; 'Policy' with a dropdown menu showing 'Document Release'; 'Title' with a text box containing 'PFMEA Document'; 'Description' with a large text area containing 'PFMEA Document'; 'Access Type' with a dropdown menu showing 'Inherited'; 'Document Approver Role' with a text box and a dropdown arrow; and 'Document Type' with a dropdown menu showing 'Product Engineering'. At the bottom right are 'Next' and 'Cancel' buttons.

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About Document Type, follow the allowed value

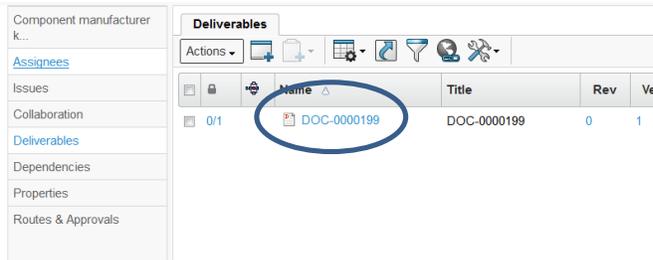
The screenshot shows a software interface with a sidebar on the left and a main content area. The sidebar contains the following fields: Name, Type, Policy, Title, Description, Access Type, Document Approver Role, and Document Type. The 'Document Type' field is currently set to 'Product Engineering'. A dropdown menu is open, displaying a list of options: Customer Input Requirements, Customer PPAP, Form Team, Functional Safety Management, Launch Management, Manufacturing Records, Open Issues Deck, Phase Sign Off, Product Engineering (highlighted in blue), Program Budget, Program Review, Program Timing, Project Checklists, Quality Engineering, Quality Planning, Risk Assessment, Score Card, and Sourcing Decisions. At the top of the sidebar, it says 'Step 1 of 2: Specify' and 'Fields in red Italics are required'.

The user selects the file to upload from the file system (in the example 'GL codes explanation.pptx')

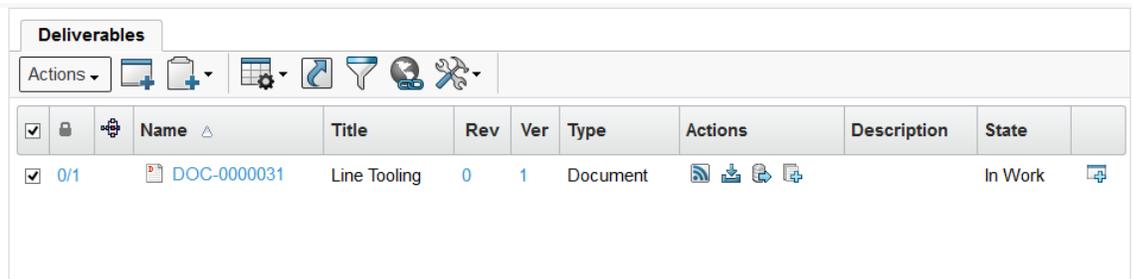
The screenshot shows the 'Step 2 of 2: Upload Files' section of the software interface. It features a 'File | Format' section with a 'Sfoggia...' button (likely 'Browse') and a dropdown menu showing 'generic'. The file name 'GL codes explanation.pptx' is displayed next to the button.

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



After document creation, the deliverable table is updated

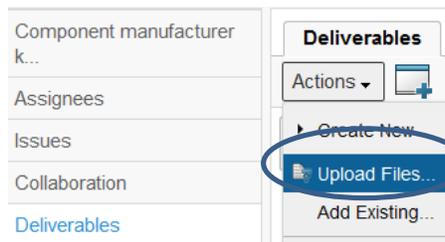


The task list is updated, and the deliverable column with the number of deliverables is updated too.

<input type="checkbox"/> Name	Slip Days	S
<input type="checkbox"/> Project Kick-Off by custom	0	0
<input type="checkbox"/> Kick-off meeting at custom	0	1
<input type="checkbox"/> Design Freeze	0	0

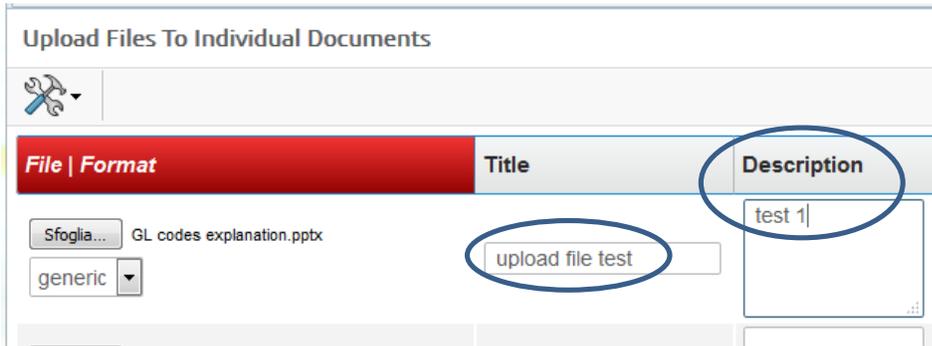
1.9.1.2 Upload files

User can select the Upload files command from the Actions menu

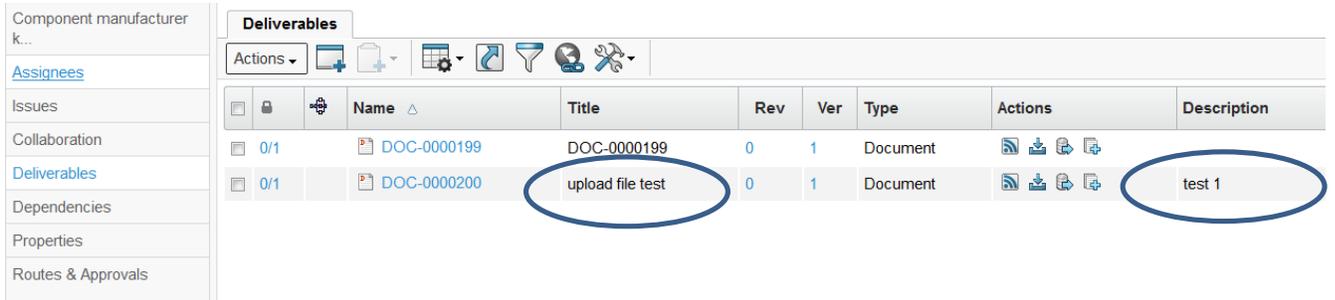


The system shows directly the form to select the file to upload, skipping the detail form, and the result is a new document generated with the default values for type and name. During import, user can set up the title and a description.

Version	1	Date:	18-April-2016
Status	Template		18



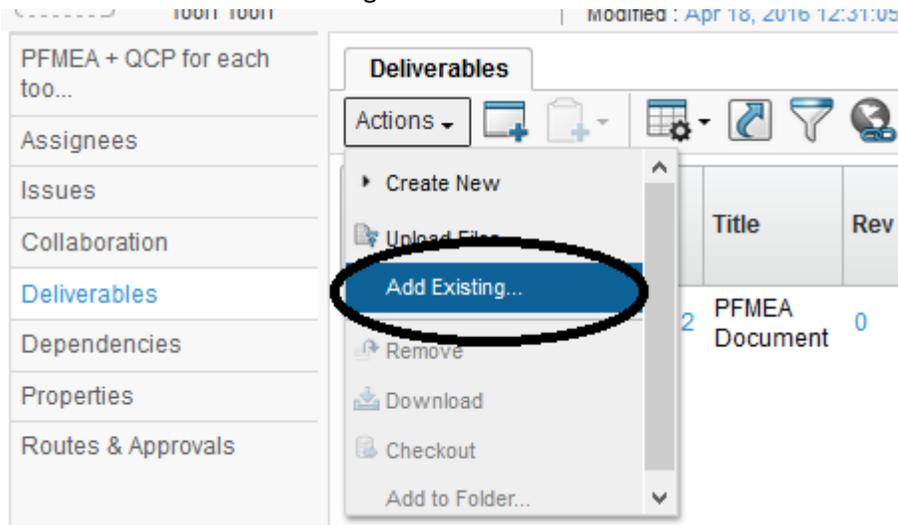
The result is a new document, with the selected file uploaded as attachment of the document



1.9.2 Add Existing Document

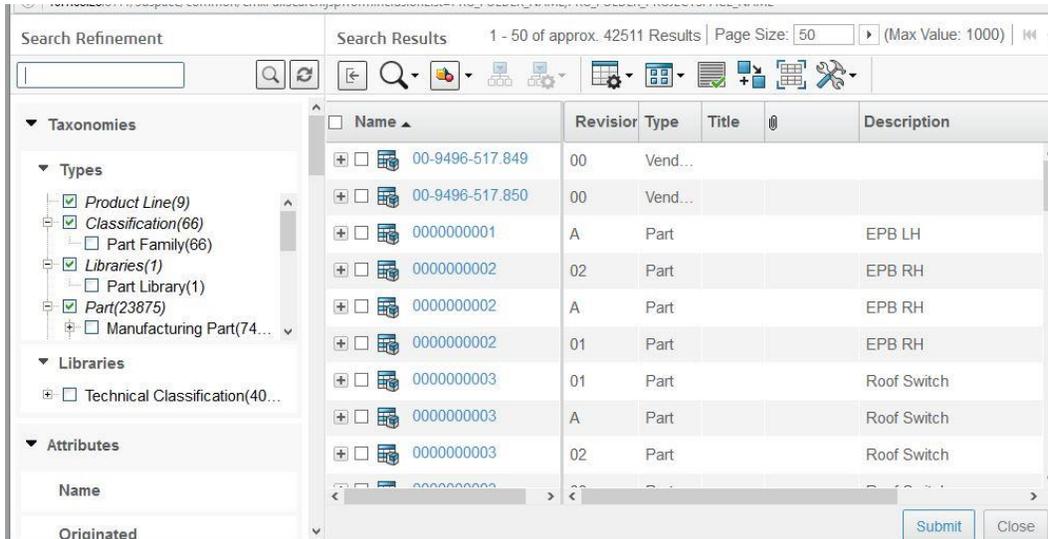
User can add an existing document (or another PLM object) as task deliverable.

User can select the Add Existing command from Action menu

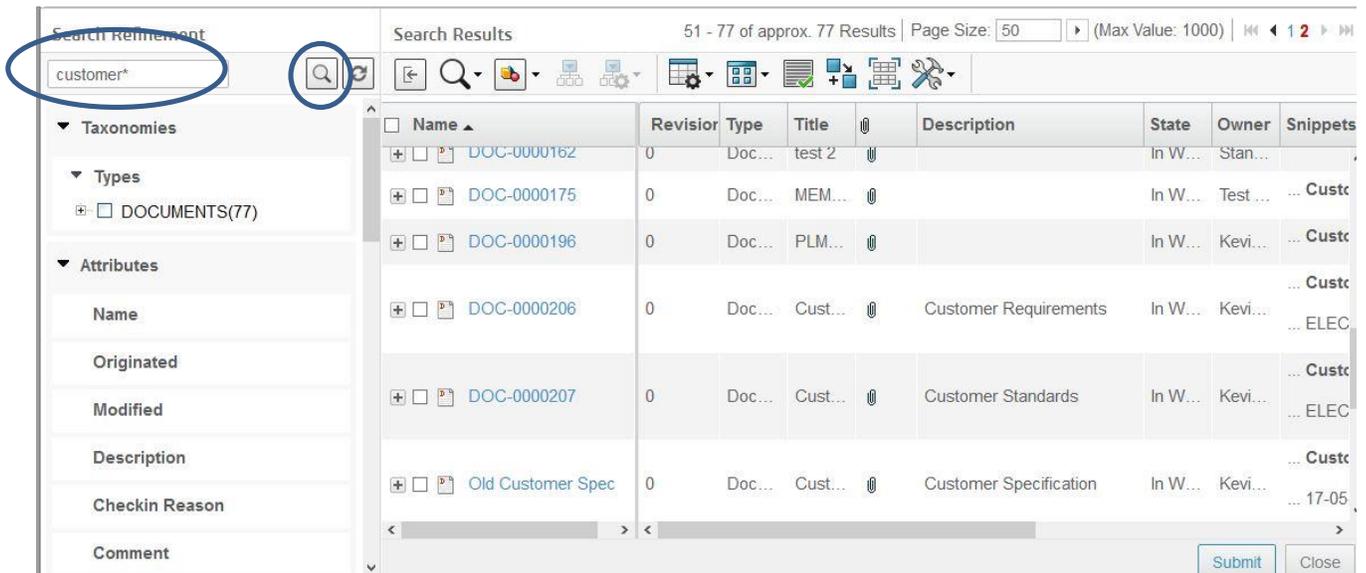


Version	1	Date:	18-April-2016
Status	Template		19

The system opens a new window with the Full Search page



User can refine the search criteria to find the Document that is need and click the  icon



Version	1	Date:	18-April-2016
Status	Template		20

Select the document to be added and click Submit command

Search Refinement: customer*

Search Results: 51 - 77 of approx. 77 Results | Page Size: 50 (Max Value: 1000)

Name	Revisor	Type	Title	Description	State	Owner	Snippets
DOC-0000162	0	Doc...	test 2		In W...	Stan...	
DOC-0000175	0	Doc...	MEM...		In W...	Test Custc
DOC-0000196	0	Doc...	PLM...		In W...	Kevi...	... Custc
DOC-0000206	0	Doc...	Cust...	Customer Requirements	In W...	Kevi...	... Custc ... ELEC
DOC-0000207	0	Doc...	Cust...	Customer Standards	In W...	Kevi...	... Custc ... ELEC
Old Customer Spec	0	Doc...	Cust...	Customer Specification	In W...	Kevi...	... Custc ... 17-05

Submit Close

The document will be added to the selected task as deliverable

Deliverables

Name	Title	Rev	Ver	Type	Description	Document Approver Role	Document Type	State
DOC-0000207	Customer Standards	0	1	Document	Customer Standards		Customer Input Requirements	In Work
DOC-0000212	PFMEA Document	0	1	Document	PFMEA Document		Product Engineering	In Work

Version	1	Date:	18-April-2016
Status	Template		21

1.9.3 Deliverable – Action column

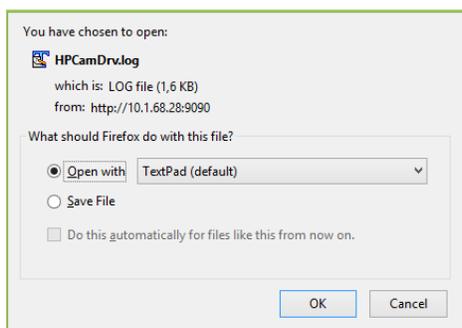
The table Deliverable contains the column Action with the icons used to create a new version of the attachments, lock the document, download the attachments or subscribe an event for the selected document.

1.9.3.1 Create new Version

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

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

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



Version	1	Date:	18-April-2016
Status	Template		22

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

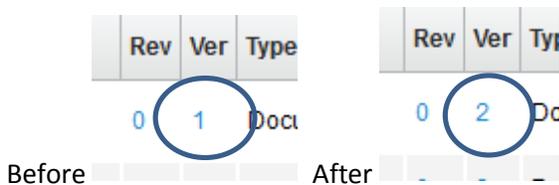
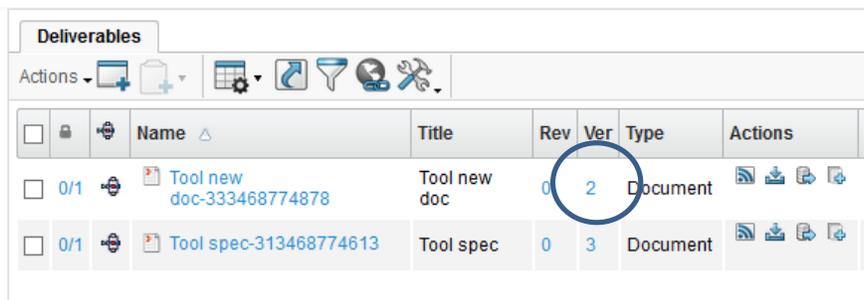


Step 2 the user has update the file, and save it on the file system

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



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

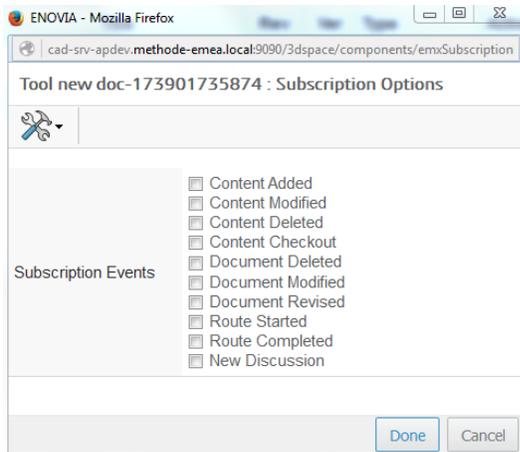
Version	1	Date:	18-April-2016
Status	Template		23

1.9.3.2 Download an attachment

If the user wants only download the document and not check in it again, he can press the download icon . The system asks where to save the file. This file is not locked, so user is not able to overwrite the file; if user wants to create a new version, has to lock the document. If document contains more than one file, the system downloads a zip file that contains all attachments.

1.9.3.3 Subscribe a Document

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



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

To subscribe a document the user

Step 1 Select the document

Step 2 Press the Subscriptions button from the deliverable table

Step 3 Select the even/s he need to be subscribe and press done

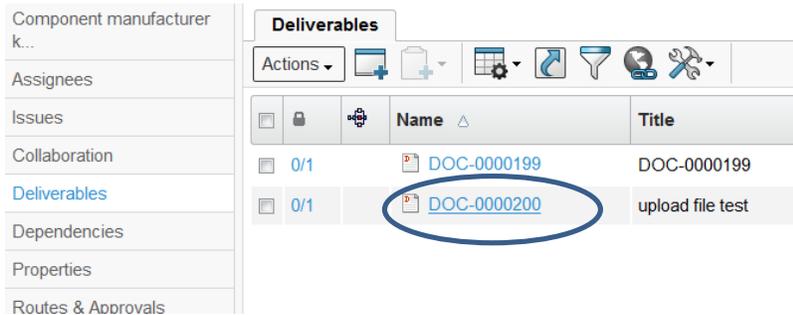
1.9.3.4 Add a new attachment

The document can contain several attachments; in order to add a new attachment (not a new version of an existing attachment), user has to select icon  and select the file to upload, using the same process when a new document is created.

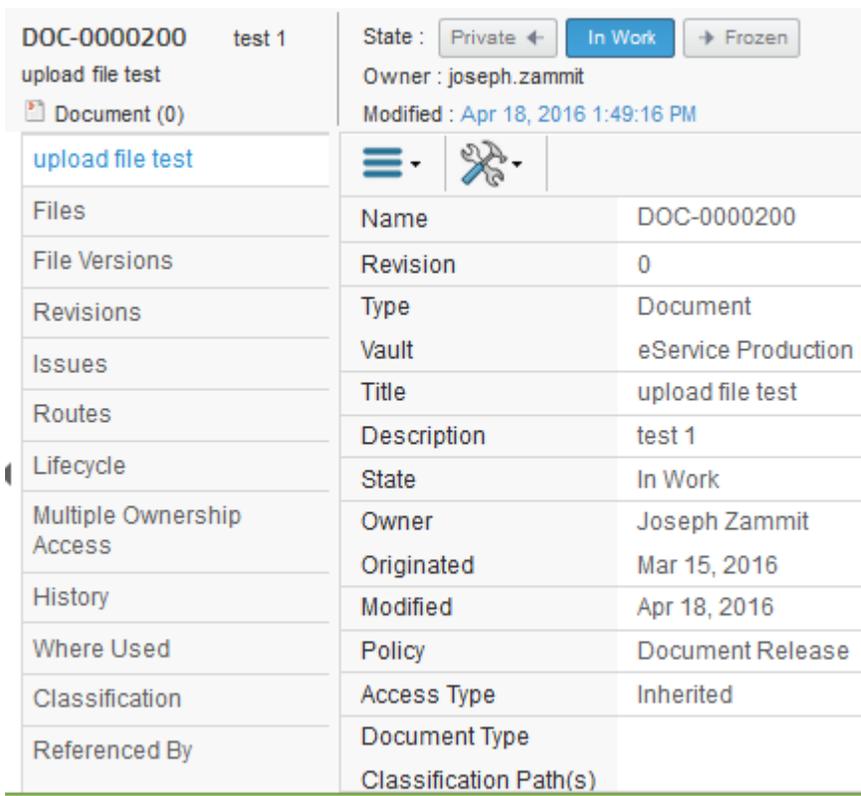
Version	1	Date:	18-April-2016
Status	Template		24

1.9.4 Deliverable – Document information

User can update document information or modify the attachments: from Deliverables table, select the link related to the document.



A new window opens with the document details.

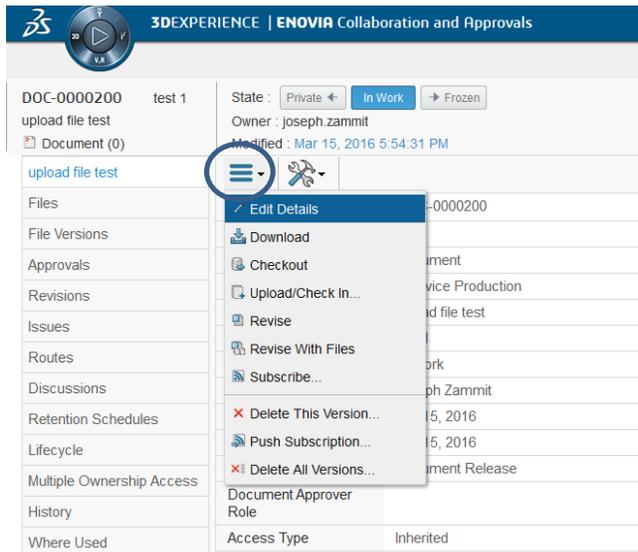


Using the functions available in Action menu and Categories menu, user can update the document.

Version	1	Date:	18-April-2016
Status	Template		25

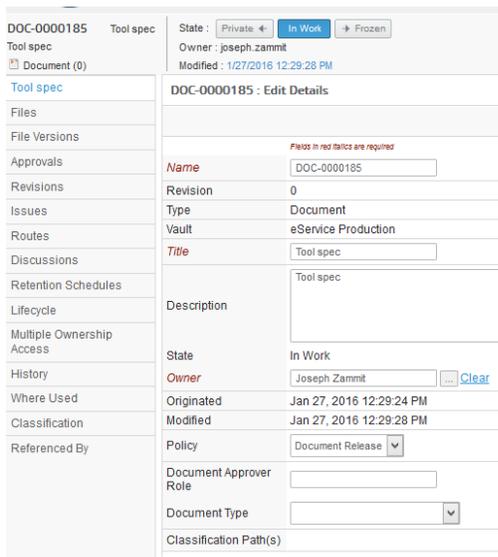
1.9.5 Document - Action menu

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.



1.9.5.1 Edit Details

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



1.9.5.2 Download

Allows the user to download the attachment of the document; the file is not locked and cannot be overwritten, unless user locks the file. Same function contains in table Deliverables, column Action.

1.9.5.3 Checkout

Allows the user to lock the file for update and download the attachment, in order to create a new version. Same function contains in table Deliverables, column Action.

Version	1	Date:	18-April-2016
Status	Template		26

1.9.5.4 Upload/Checkin

Allows the user to upload a new version of the attachment in the document; user can create a new version only if file is locked. If user uploads a file with a different file name of previous version, the system asks to confirm the upload. Same function contains in table Deliverables, column Action, after a checkout.

1.9.5.5 Revise

Allows the user to create a new revision of the document without attachments (create a new revision with same information or previous revision). Only document in state Released can be revised.

1.9.5.6 Revise with files

Allows users to create a new revision of the document with the same attachments and information of the previous release. Only document in state Released can be revised.

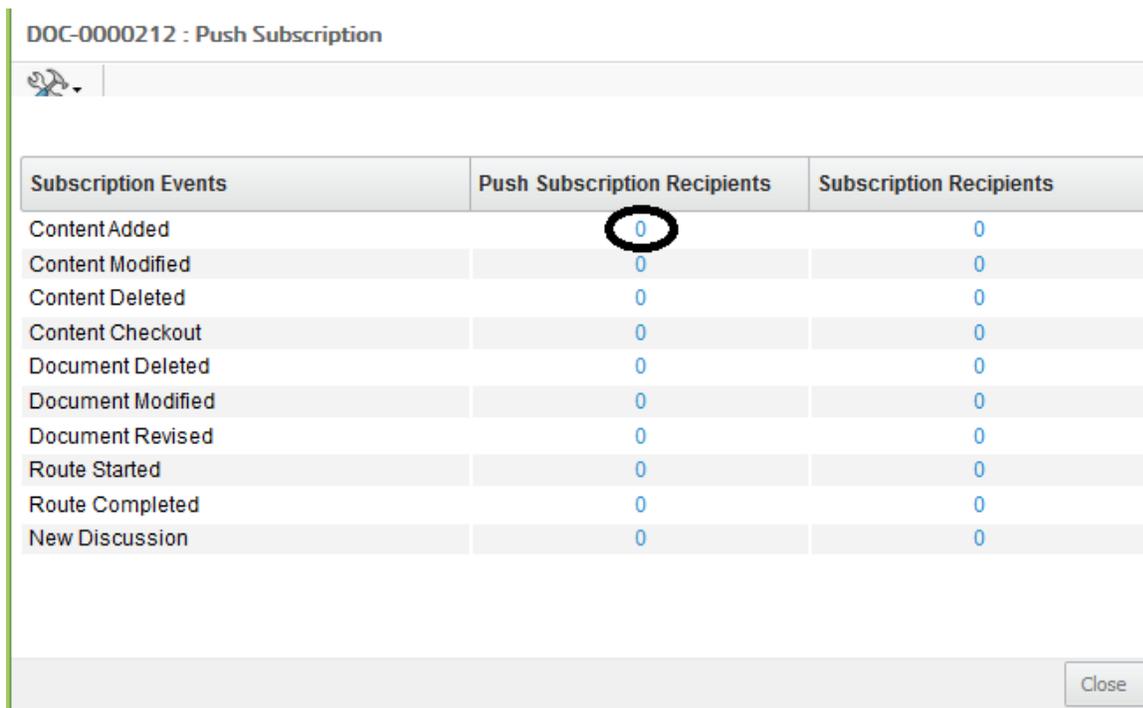
1.9.5.7 Subscribe

Allows users to subscribe the document. Same function contains in table Deliverables, column Action.

1.9.5.8 Push subscribe

Force the subscription to a document for a user: the document owner can select person to be notified when a specific event occurred on the document.

Select command Push Subscription from Action menu; the system opens a window with events managed by subscription and the number of users involved.



Subscription Events	Push Subscription Recipients	Subscription Recipients
Content Added	0	0
Content Modified	0	0
Content Deleted	0	0
Content Checkout	0	0
Document Deleted	0	0
Document Modified	0	0
Document Revised	0	0
Route Started	0	0
Route Completed	0	0
New Discussion	0	0

Document owner can select the link related to event to subscribe; the system opens a window with user already selected. Select the icon  to add users involved.

Version	1	Date:	18-April-2016
Status	Template		27

DOC-0000212 : Push Subscription Recipients










<input type="checkbox"/>	Name <small>△</small>	Email Address
<i>No Objects Found</i>		

Page of 1    

Enter the search criteria, select command Search and select person

Search




Type  Person

User Name

Last Name

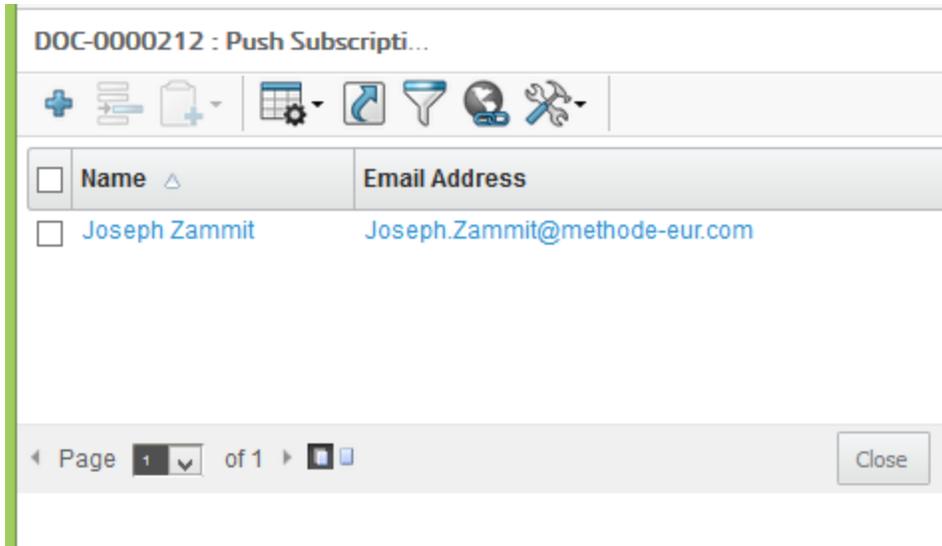
First Name

Organization

Limit to results Paginate results

Version	1	Date:	18-April-2016
Status	Template		28

The system updates the list of person involved



The system updates also the table with events and the number of person involved

DOC-0000212 : Push Subscription

Subscription Events	Push Subscription Recipients	Subscription Recipients
Content Added	1	1
Content Modified	0	0
Content Deleted	0	0
Content Checkout	0	0
Document Deleted	0	0
Document Modified	0	0
Document Revised	0	0
Route Started	0	0
Route Completed	0	0
New Discussion	0	0

1.9.5.9 Delete this version and Delete all versions

Document can contain several files and each file can be updated several times; every time a file is updated, the system creates a new version.

The commands allow user to delete the last version or all versions of files selected by user.

Version	1	Date:	18-April-2016
Status	Template		29

The form with document details contain the table with the files uploaded, only the last version. In the example, the document contains two files and one of these has two versions

The screenshot shows a document management interface for a 'PFMEA Document'. On the left is a navigation menu with options like Files, File Versions, Revisions, Issues, Routes, Lifecycle, etc. The main area displays document details in a table format. Below the details is a toolbar with various icons. At the bottom, there is a table listing file versions:

File Name	Ver	Originated	Comments	Originator	For
<input type="checkbox"/> DFMEA_556450-57.xls	2	Apr 18, 20...	New version	Matthew S...	ge
<input type="checkbox"/> TL_226_EN.PDF	1	Apr 18, 20...		Matthew S...	ge

Delete This Version

User has to select the file/files to delete and select command from Action menu. File will be deleted after confirmation

The screenshot shows the same document management interface as above, but with an action menu open over the file 'DFMEA_556450-57.xls'. The menu includes options like 'Edit Details', 'Download', 'Checkout', 'Upload/Check In...', 'Subscribe...', 'Delete This Version...', 'Push/Checkout...', and 'Delete All Versions...'. The 'Delete This Version...' option is circled in black. In the table below, the checkbox for 'DFMEA_556450-57.xls' is also circled in black.

File Name	Ver	Originated	Comments	Originator
<input checked="" type="checkbox"/> DFMEA_556450-57.xls	2	Apr 18, 20...	New version	Matthew
<input type="checkbox"/> TL_226_EN.PDF	1	Apr 18, 20...		Matthew

Version	1	Date:	18-April-2016
Status	Template		30

The system deletes the last version; the previous version is the active version.

File Name	Ver	Originated	Comment	Originator	Format
<input type="checkbox"/> DFMEA_556450-57.xls	1	Apr 18, 2...		Matthew ...	generic
<input type="checkbox"/> TL_226_EN.PDF	1	Apr 18, 2...		Matthew ...	generic

Delete All Versions

User has to select the file/files to delete and select command from Action menu. File will be deleted after confirmation

DOC-0000212 PFMEA Document State: Private In Work Frozen
 Owner: matthew.spiteri
 Modified: Apr 18, 2016 2:17:36 PM

PFMEA Document

- Edit Details
- Download
- Checkout
- Upload/Check In...
- Subscribe...
- Delete This Version...
- Push Subscription...
- Delete All Versions...

File Name	Ver	Originated	Comme
<input checked="" type="checkbox"/> DFMEA_556450-57.xls	2	Apr 18, 20...	new ver
<input type="checkbox"/> TL_226_EN.PDF	1	Apr 18, 20...	

The system deletes all the versions of select files.

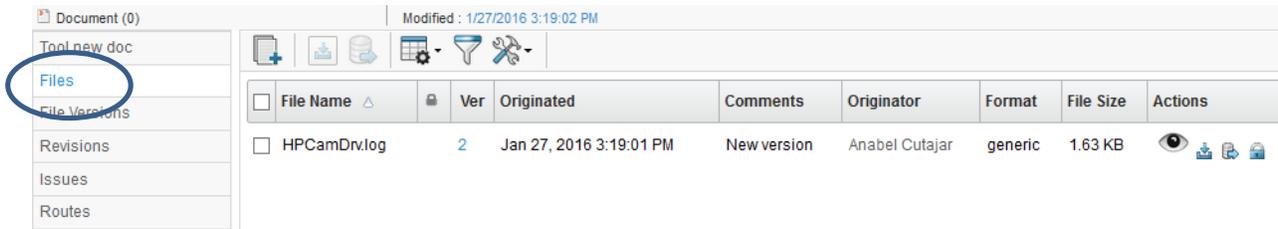
File Name	Ver	Originated	Comments
<input type="checkbox"/> TL_226_EN.PDF	1	Apr 18, 20...	

Version	1	Date:	18-April-2016
Status	Template		31

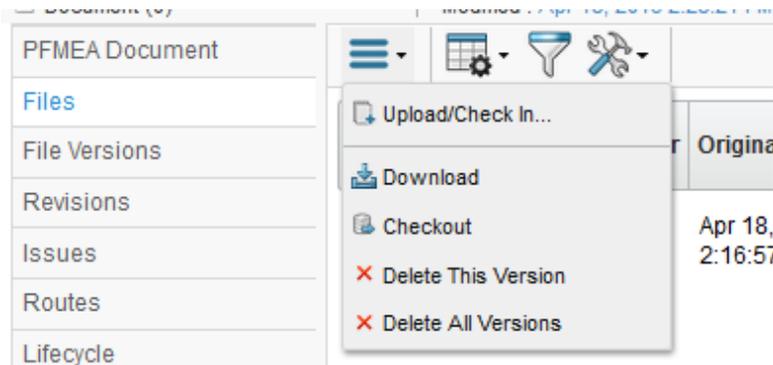
1.9.6 Document - Categories menu

1.9.6.1 Files

The Files command shows all the files contained in the document (the table contains also the commands to update the files)

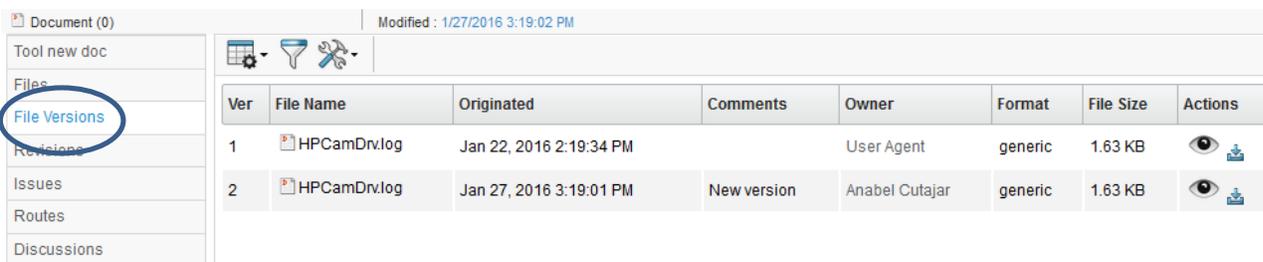


Action menu contains the commands to upload or update files, download files, manage the file versions



1.9.6.2 File Versions

The File Versions command shows all versions for all files contained in the document (only the download function is available)



Version	1	Date:	18-April-2016
Status	Template		32

1.9.6.3 Revisions

The table shows all document revisions; the Action menu contains the command to create a new revision; see chapter “Document – Action menu” and chapter “Revise a document”

Tool new doc-333468774878 Tool new doc State : In Work ⏪ ⏩
 Tool new doc Owner : anabel
 Document (1) Modified : Feb 25, 2016 12:39:09 PM

Tool new doc ⚙️ 🔍 🔧

Name	Title	Revision	Description	State
 Tool new doc-333468774878	Tool new doc	0	Tool new doc	Released
 Tool new doc-333468774878	Tool new doc	1	Tool new doc	In Work

Files
 File Versions
Revisions
 Issues
 Routes

About Issues, see chapter Open Issue Deck

About Routes, see chapter Tasks Approval

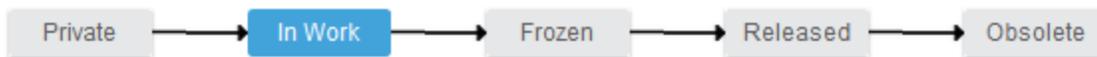
Version	1	Date:	18-April-2016
Status	Template		33

1.9.7 Release a document

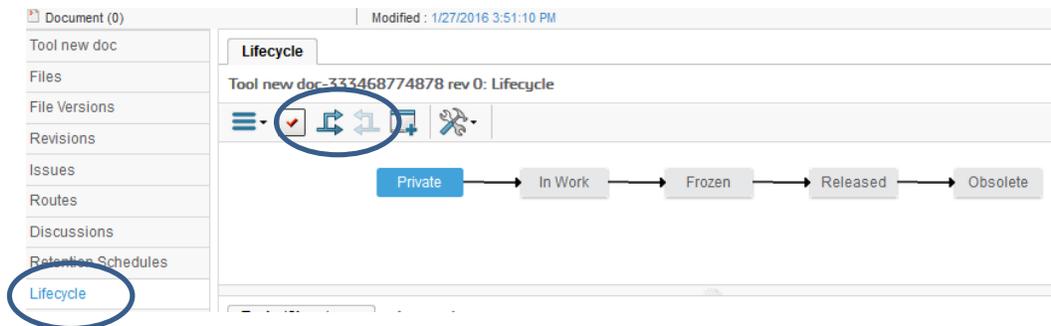
Task assignee can release a document; in order to complete the task, all documents contained as deliverables have to be released.

Document Lifecycle:

- Private: Private documents are only accessible to the owner and are not shared in the project community.
- In Work: the document, and new versions of documents, is created in state In Work and it can be modified. The owner can demote the document to Private, or promote it to Review. The Project Leader can promote the document to Released.
- Frozen: the document is being reviewed for approval. Users can demote and promote documents between the In Work and Frozen states and from the Frozen to Released states without creating new versions. The owner can demote the Document to Private, or promote it to Release if an approval process is not requested.
- Released: the document is available for production or delivery. Released documents cannot be deleted or demoted.
- Obsolete: the document is no longer used and must not be used in projects. The document cannot be promoted, demoted, or deleted.



In order to release the document, user has to select the Lifecycle command



Using the  icon, the user moves the document state from Private to Released.

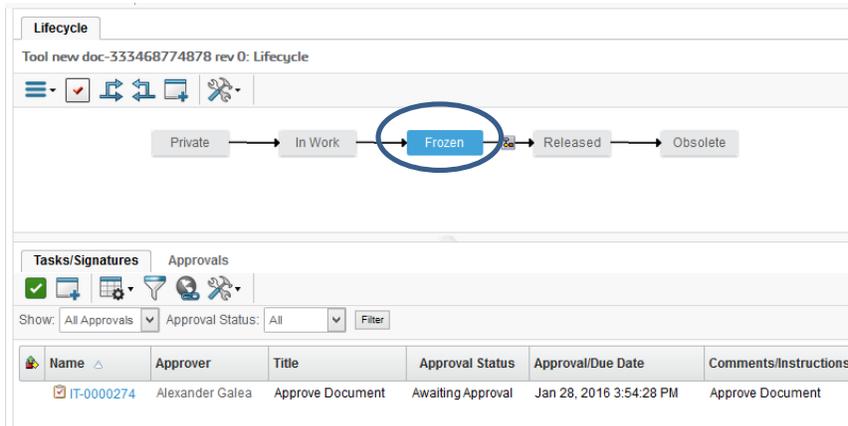
If the document was created from a template document and if the Project Lead has defined a Document Approval Role, after promoting the document to “Frozen”, the system creates a route process. In this case, the task assignee cannot release the document but has to wait for the approval.

Instead, if the document is not created from a template or a Document Approval Role is not defined, the task assignee can promote the document to Released.

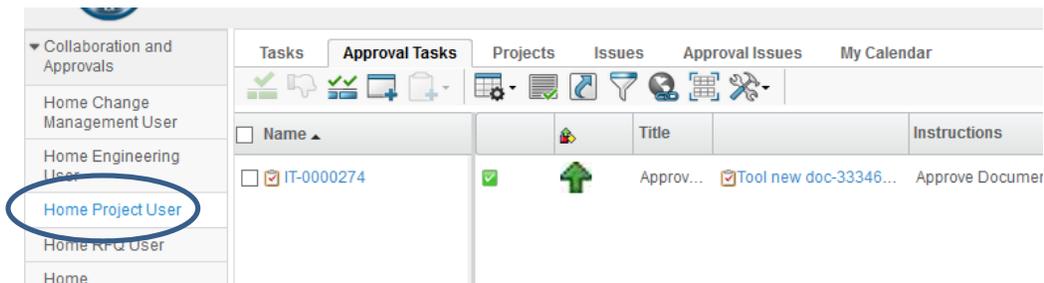
Version	1	Date:	18-April-2016
Status	Template		34

1.9.7.1 Document with an approval pending

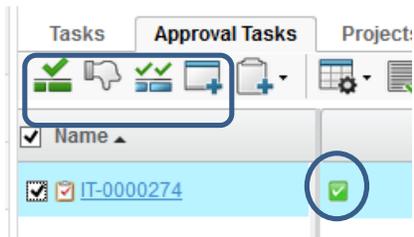
In case of an approval process, the document will be released only after the task approval.



The Document Approver receives a notification about the approval process; the dashboard with Approval Tasks is updated



Toolbar contains icons to approve or reject the tasks; also the table contains an icon to approve the task



Selecting the task, user can see document that has to be approved

Version	1	Date:	18-April-2016
Status	Template		35

IT-0000274 State: **Assigned** Review
 Approve Document Owner: alexanderg Modified: 1/27/2016 3:54:28 PM
 Inbox Task (1)

Properties

Message	Originated	Jan 27, 2016 3:54:28 PM	Owner	anabel
	Allow Delegation	Yes	Due Date	Jan 28, 2016 3:54:28 PM
	Routes	R-0000235	Assignee	Alexander Galea
	Approval Status	None	Action	Approve
	Task Requirement	Optional	State	Assigned
	Comments		Instructions	Approve Document
			Route Owner Review	No

Content

Name	Description	State Condition	Actions
Tool new doc-333468774878	Tool new doc	Frozen	

The Action menu contains the commands to approve, reject or delegate the task.

Properties

- Change Assignee...
- Edit Details...
- Approve**
- Reject
- Abstain

In order to approve or reject the task, a comment has to be provided

Edit Task Details

Fields in red italics are required

Due Date
 Jan 28, 2016 5:00 AM

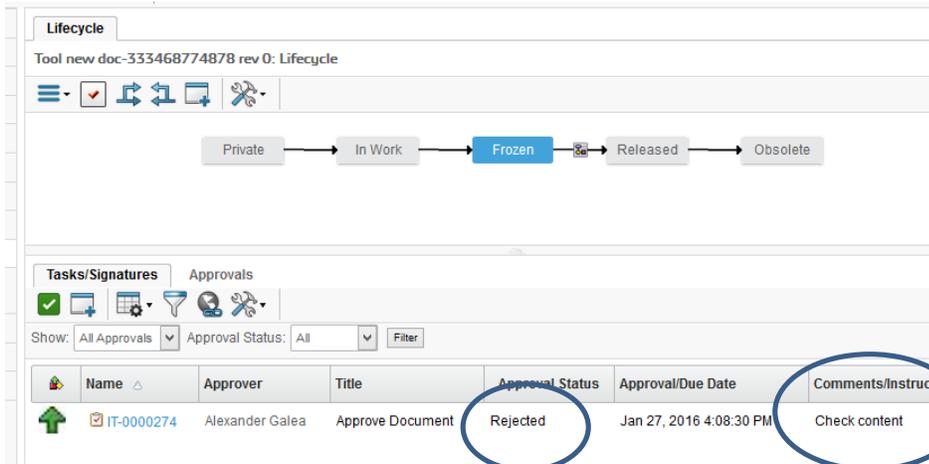
Assignee
 Alexander Galea

Comments

Version	1	Date:	18-April-2016
Status	Template		36

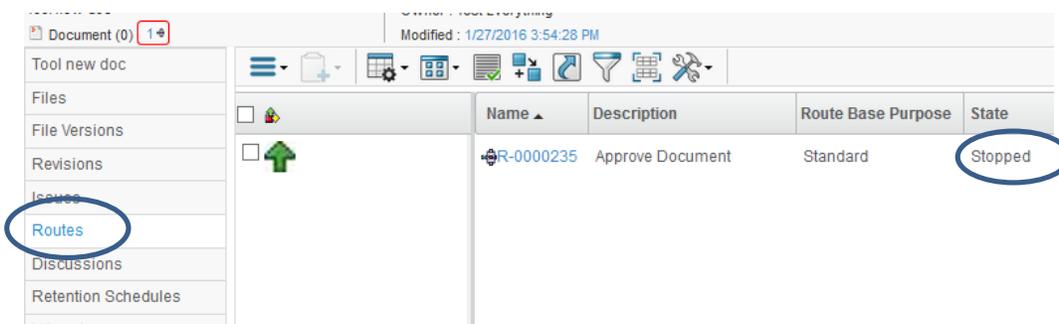
1.9.7.2 Document rejected

If document is rejected, task assignee is notified. Searching for the document, using the command Lifecycle (tab Tasks/Signatures), user is able to see comments entered by document approver.

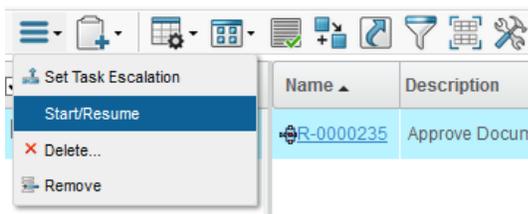


In order to update the document, user has to move the document from “Frozen” to “In Work” state, updates the document (creating a new version or uploading a new file), promotes the document to “Frozen”.

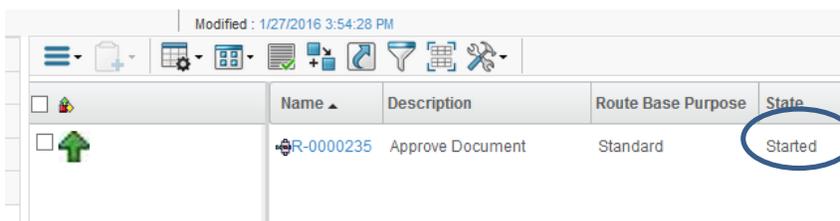
After this, in order to restart approval process, select **Routes** command, notes that the route is “Stopped”.



Select the route using the checkbox and select command “Start/Resume” from Action menu



The Route moves from “Stopped” to “Started”



Version	1	Date:	18-April-2016
Status	Template		37

The Document Approver user is notified and the approval task is resumed.

1.9.7.3 Document approved

If the document is approved, the task assignee is notified. Searching for the document, using the command Lifecycle (tab Tasks/Signatures), user can see the comments entered by the document approver.

The screenshot shows the Lifecycle tool interface for document 'Tool new doc-333468774878 rev 0: Lifecycle'. A workflow diagram at the top shows states: Private → In Work → Frozen → Released → Obsolete. Below, the 'Approvals' tab is active, displaying a table of tasks. The 'Released' state is highlighted in the workflow, and the 'Document approved' comment in the 'Comments/Instructions' column of the 'Released' task is circled in blue.

State	Assignee	Task/Signature	Task Title	Comments/Instructions	Action	Due Date	Completed Date
Private							Jan 27, 2016 3:54:23 PM
In Work							Jan 27, 2016 4:12:36 PM
Frozen	Alexander Galea	IT-0000274	Approve Document	Document approved	Approved	Jan 28, 2016	Jan 27, 2016 4:18:54 PM
Released							
Obsolete							

In case of several iterations of an approval process, to see the history of the approval, press the link from Task/Signature column. Select command Revision to see all task approval iterations and comments.

The screenshot shows the task details for 'IT-0000274 Approve Document'. The 'Revision' link in the left sidebar is circled in blue. The main content area displays a table of approval iterations.

Name	Title	Revision	Task Type	State	Approval Status	Comments/Instructions	Due Date	Completed Date	Assignee
IT-0000274	Approve Document	1	Approve	Complete	Reject	Check content	Jan 28, 2016	Jan 27, 2016	alexanderg
IT-0000274	Approve Document	2	Approve	Complete	Approve	Document approved	Jan 28, 2016	Jan 27, 2016	alexanderg

The deliverable table is updated and shows the state of the documents

The screenshot shows the Deliverables table with columns: Name, Title, Rev, Ver, Type, Actions, Description, Document Approver Role, Document Type, and State. The 'Released' state for the first document is circled in blue.

Name	Title	Rev	Ver	Type	Actions	Description	Document Approver Role	Document Type	State
Tool new doc-333468774878	Tool new doc	0	2	Document		Tool new doc	DE Senior Design Engineer	Product Engineering	Released
Tool spec-313468774613	Tool spec	0	3	Document		Tool spec updated	TE Senior Tooling Engineer	Quality Engineering	Private

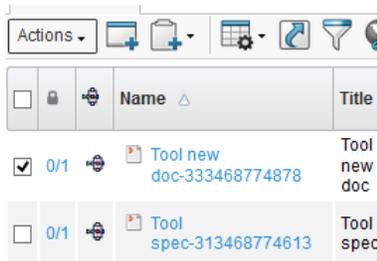
Version	1	Date:	18-April-2016
Status	Template		38

1.9.8 Folders versus Deliverables

Folders and deliverables, attached to a WBS tasks are different objects.

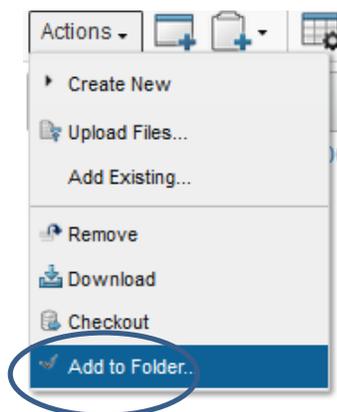
- When a user attaches a document to a WBS task, the document is not contained in any folder
- When a user checks in a document into a folder, the document is not associated to any specific WBS task.

User can attach a document as deliverable and then add to a specific folder. Select document to link to a folder

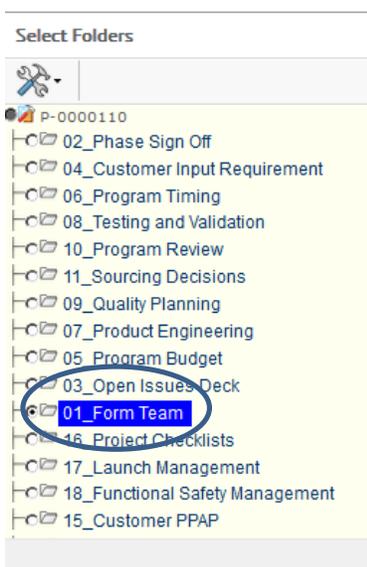


	Name	Title
<input checked="" type="checkbox"/> 0/1	Tool new doc-333468774878	Tool new doc
<input type="checkbox"/> 0/1	Tool spec-313468774613	Tool spec

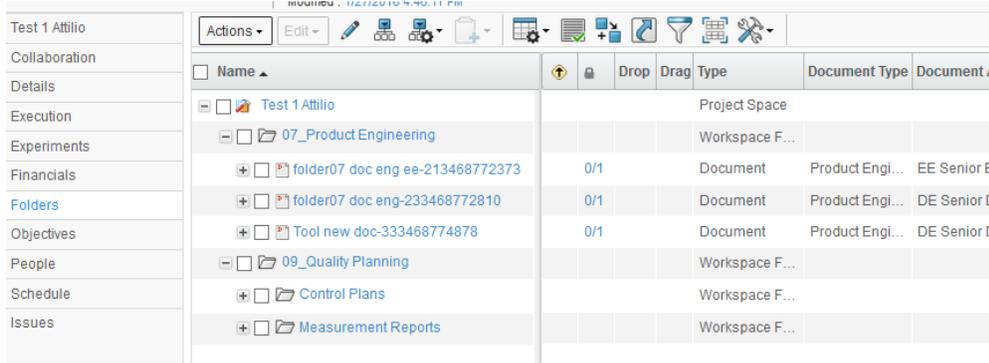
Actions menu contains the command “Add to Folder”



User has to select destination folder (following image can be different because depends on folder defined for project)



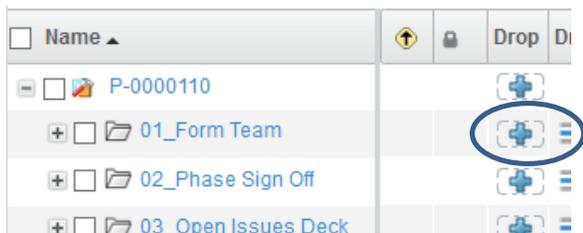
Version	1	Date:	18-April-2016
Status	Template		39



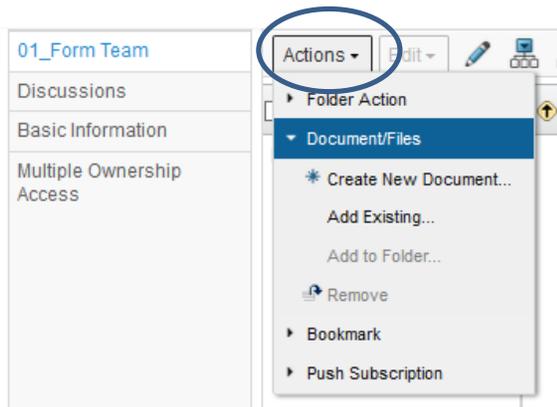
1.9.9 Adding document directly to a folder

Folders are containers for documents and documents are container for files.

Documents can be created using a drag & drop function; in order to create a new document, user can select a file from the file system and drop it with the mouse over the  icon related to the specific folder. Then release the mouse in order to start the document encoding. The icon becomes orange .



Users can create a document also using dedicate functions contained in folder Action menu



Version	1	Date:	18-April-2016
Status	Template		40

1.9.10 Revise a document

When a document is revised, the task containing the previous revision is not updated (the task contains the previous revision but not the new revision); instead, if document was contained in a folder, after the revision the folder contains also the new document revision.

In order to update the task with the new document revision, the process is the following:

- user has to search for document in folder structure (or using other search function)
- create the new revision
- add the new revision to task as deliverables

Tasks list shows all tasks assigned to user

Tasks Filter: Assigned Tasks							
Name	Slip Days			State	% Complete	Project	
<input type="checkbox"/> Lab Testing and Equipment	30	0	0	Assign	<input type="text"/>	RFQ000009-01	
<input type="checkbox"/> Supplier Nomination	29	0	0	Assign	<input type="text"/>	Test Stanley Muller	
<input type="checkbox"/> Tool manufacturer kick-off	3	2	0	Review	<div style="width: 100%; height: 10px; background-color: orange;"></div>	Test 1 Attilio	
<input type="checkbox"/> Manufacturing Resources	0	0	0	Assign	<input type="text"/>	RFQ-0000018-01	
<input type="checkbox"/> Tool design design reviews :	0	0	0	Assign	<input type="text"/>	Test 1 Attilio	
<input type="checkbox"/> Design Freeze	0	0	0	Assign	<input type="text"/>	Test Stanley Muller	
<input type="checkbox"/> PLS PHASE 3 - Production D	0	0	0	Assign	<input type="text"/>	Test Stanley Muller	

A task can be created by Project Lead without specify a deliverable, in this case the task assignee has to search for a document contained in a folder (example: in Phase 2 the document “DFMEA” is created, in Phase 3 the document has to be revised).

Step 1 Search the last revision of the document to revise, select the link related to the project containing the task, select the command Folders, expand folder structure using dedicate icon or clicking on char “+”

Name	Drop	Drag	Type	Document T
<input type="checkbox"/> Test 1 Attilio			Project Space	
<input type="checkbox"/> 07_Product Engineering			Workspace F...	
<input type="checkbox"/> folder07 doc eng ee-213468772373	0/1		Document	Product Eng
<input type="checkbox"/> folder07 doc eng-233468772810	0/1		Document	Product Eng
<input type="checkbox"/> Tool new doc-333468774878	0/1		Document	Product Eng
<input type="checkbox"/> 09_Quality Planning			Workspace F...	

Version	1	Date:	18-April-2016
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Step 2 Select the link related to the document to revise: the form with document details opens.

Step 3 Select the command Revisions

Tool new doc-333468774878 Tool new doc State : Frozen ← Released → Obsolete

Tool new doc

Owner : Test Everything

Modified : 1/27/2016 4:32:46 PM

Document (0)

Tool new doc

Files

File Versions

Revisions

Issues

Routes

Discussions

Name	Title	Revis
Tool new doc-333468774878	Tool new doc	0

Two functions are available, only if selected document is the latest revision in the sequence and is released:

- Revise: Creates a new revision without the files checked into the document
- Revise With Files: Creates a new revision with the files checked into the document

After the document revision, the Revision table is updated

Tool new doc-333468774878 Tool new doc State : Frozen ← Released → Obsolete

Tool new doc

Owner : Test Everything

Modified : 1/27/2016 4:32:46 PM

Document (0)

Tool new doc

Files

File Versions

Revisions

Issues

Routes

Discussions

Retention Schedules

Lifecycle

Name	Title	Revision	Description	State
Tool new doc-333468774878	Tool new doc	0	Tool new doc	Released
Tool new doc-333468774878	Tool new doc	1	Tool new doc	In Work

Also the project folder is updated, because new document revision is added to folder

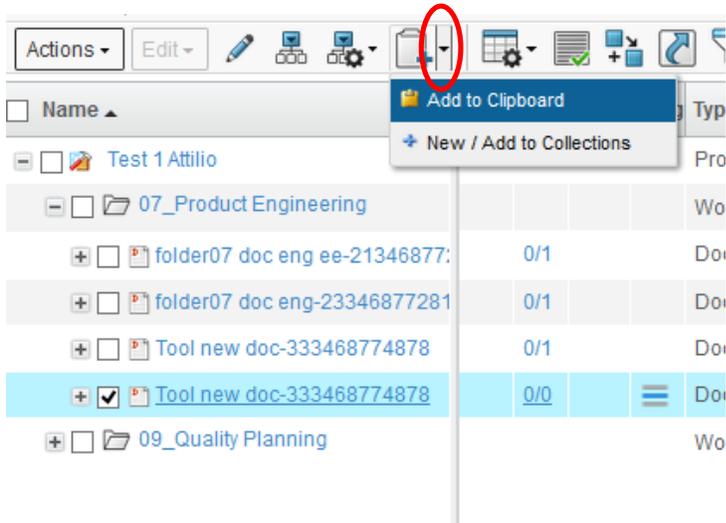
Name	Drop	Drag	Type	Document Type	Document Approver Role	Title	Actions	Rev	Ver
Test 1 Attilio			Project Space						
07_Product Engineering			Workspace F...						
folder07 doc eng ee-21346877:	0/1		Document	Product Engi...	EE Senior Electrical Eng...	fold...		0	1
folder07 doc eng-23346877281	0/1		Document	Product Engi...	DE Senior Design Engin...	fold...		0	1
Tool new doc-333468774878	0/1		Document	Product Engi...	DE Senior Design Engin...	Tool...		0	2
Tool new doc-333468774878	0/0		Document	Product Engi...	DE Senior Design Engin...	Tool...		1	
03_Quality Planning			Workspace F...						

Version	1	Date:	18-April-2016
Status	Template		42

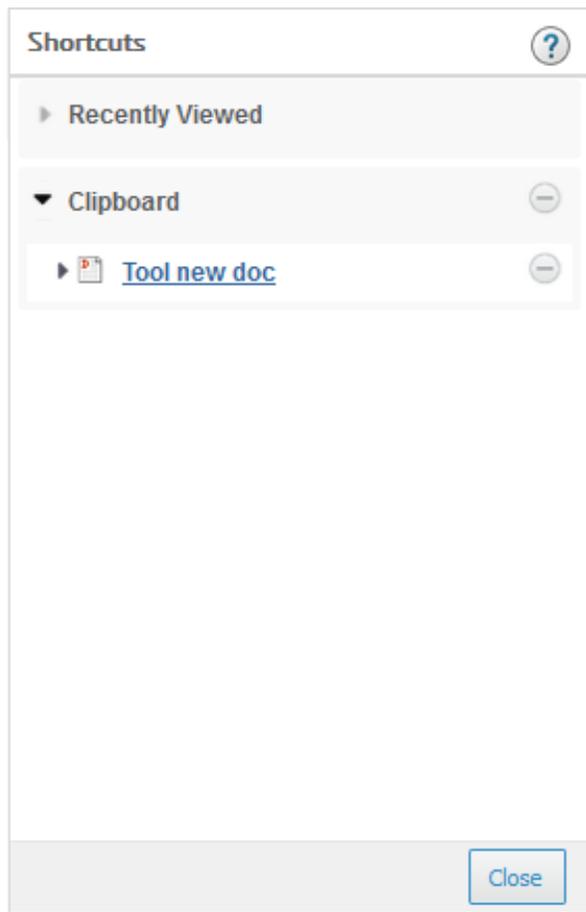
Step 4 Add document to clipboard

The new document revision has to be added as task deliverable to task: user has to select new document revision, add document to Clipboard, add document to task from Clipboard

Add document to Clipboard



A new window opens with Clipboard content, then close the window.



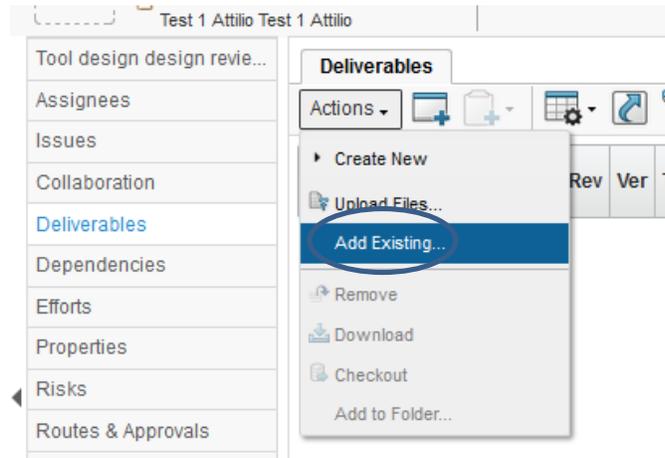
Version	1	Date:	18-April-2016
Status	Template		43

Step 5 Select task deliverable from task list

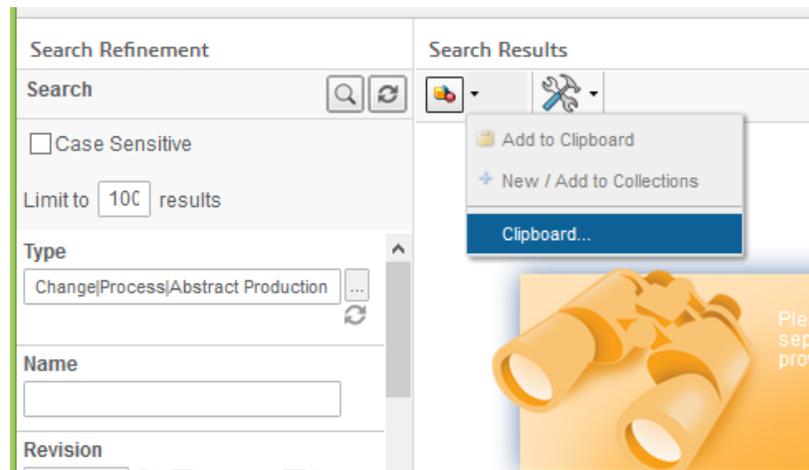
Tasks | Filter: Assigned Tasks

Name	Slip Days	State	% Complete	Project
Lab Testing and Equipment	30	Assign		RFQ000009-01
Supplier Nomination	29	Assign		Test Stanley Mul
Tool manufacturer kick-off	3	Review	100%	Test 1 Attilio
Manufacturing Resources	0	Assign		RFQ-0000018-C
Tool design design reviews :	0	Assign		Test 1 Attilio
Design Freeze	0	Assign		Test Stanley Mul
PLS PHASE 3 - Production C	0	Assign		Test Stanley Mul

Step 6 From Deliverables Action menu, select command Add Existing

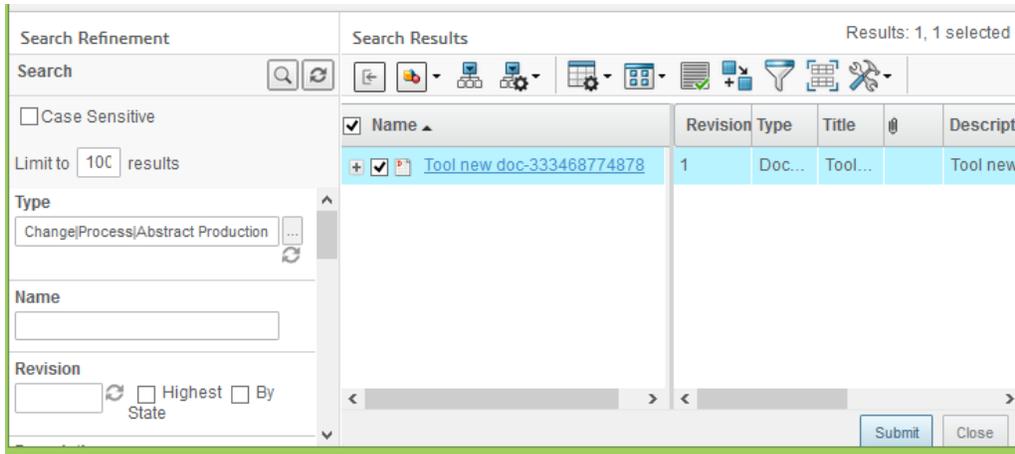


Step 7 From the search form, select the command Clipboard

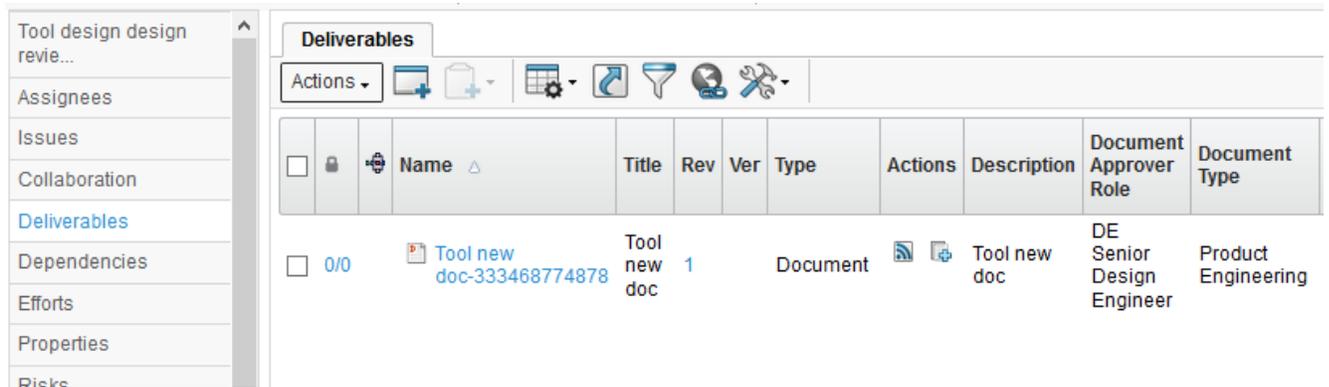


Version	1	Date:	18-April-2016
Status	Template		44

Select document and press Submit



Deliverables table is updated with new document revision



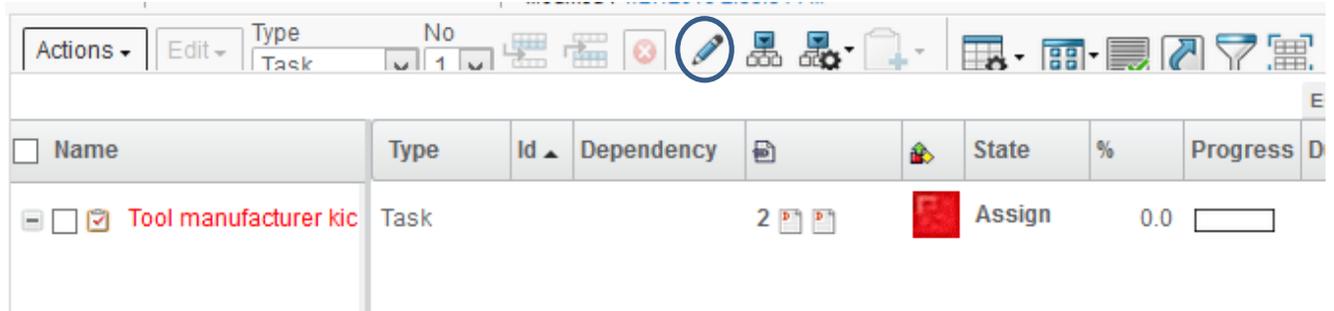
The user can work on the document as described before. The new document revision maintains the same Document Approval Rule defined from the project template.

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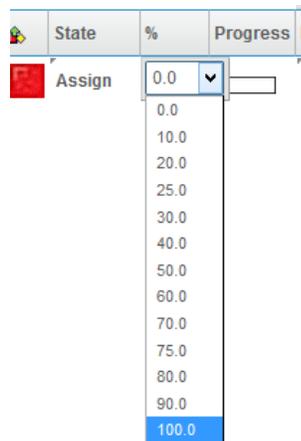
1.10 Tasks Approval

When the task assignee sets % Complete to 100 the task is moved to Review state. Task assignee also can promote manually the state from Active to Review; in this case, %Complete is set to 100%.

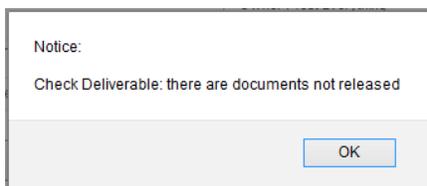
In order to complete task, select task name from task list: a form with task details opens



The user can select the icon Edit and then can change “%Complete” to 100.0



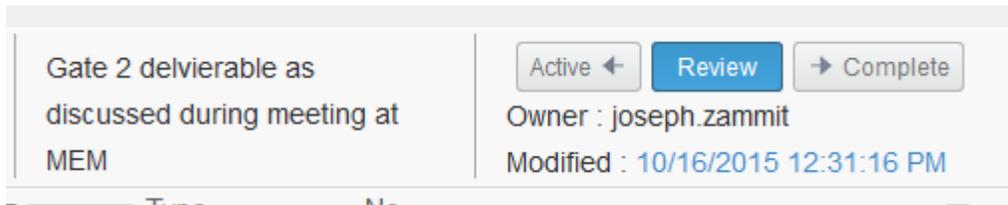
The task moves to the Review state only if all deliverables state is Released, otherwise an alert is issued and the task is not completed.



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Status	Template		46

1.10.1 Tasks without an approval process

If the Project Lead didn't define a task approval, the task assignee can close the task (promote to state Complete is enabled)



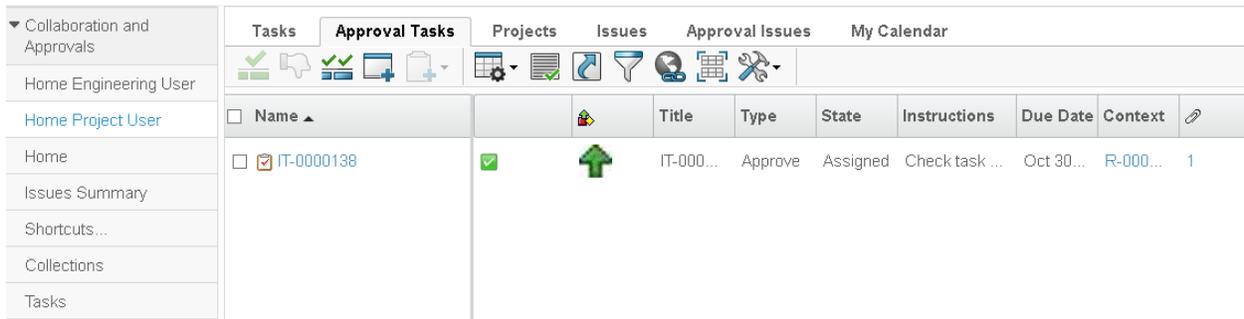
1.10.2 Tasks with an approval process

If the Project Lead defined a task approval, the function to move state to Complete is disabled



Approval Tasks shows all the tasks to be approved (tab Approval Tasks is used not only for project tasks but also in approval process for documents, Change Request, MCOs, etc).

Task approver receives also a notification when a task is moved to state Review



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If task is assigned to a PLM specific role (like all Design Engineer or all TE Tooling Manager), all the people that has the role assigned can see the task.

The first user that accepts the task, becomes the task assignee

Originated	Oct 16, 2015 4:35:01 PM
Allow Delegation	Yes
Routes	R-0000142
Approval Status	None
Task Requirement	Optional
Comments	

Task approver can see the content of the task to be approved and can approve or reject the task

Name	Description	State Condition	Actions
Make-Buy decision	Capacity analysis and confirmation (matrix) PQ, quote analysis and alignment - NOTE: what we sell in EUR we should buy in EUR	Review	

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Status	Template		48

In both scenarios, a comment is mandatory

Edit Task Details

Fields in red italics are required

Due Date
   [Clear](#)

Assignee
Evan Stringos

Comments

[Approve](#) [Cancel](#)

Edit Task Details

Fields in red italics are required

Due Date
   [Clear](#)

Assignee
Evan Stringos

Comments

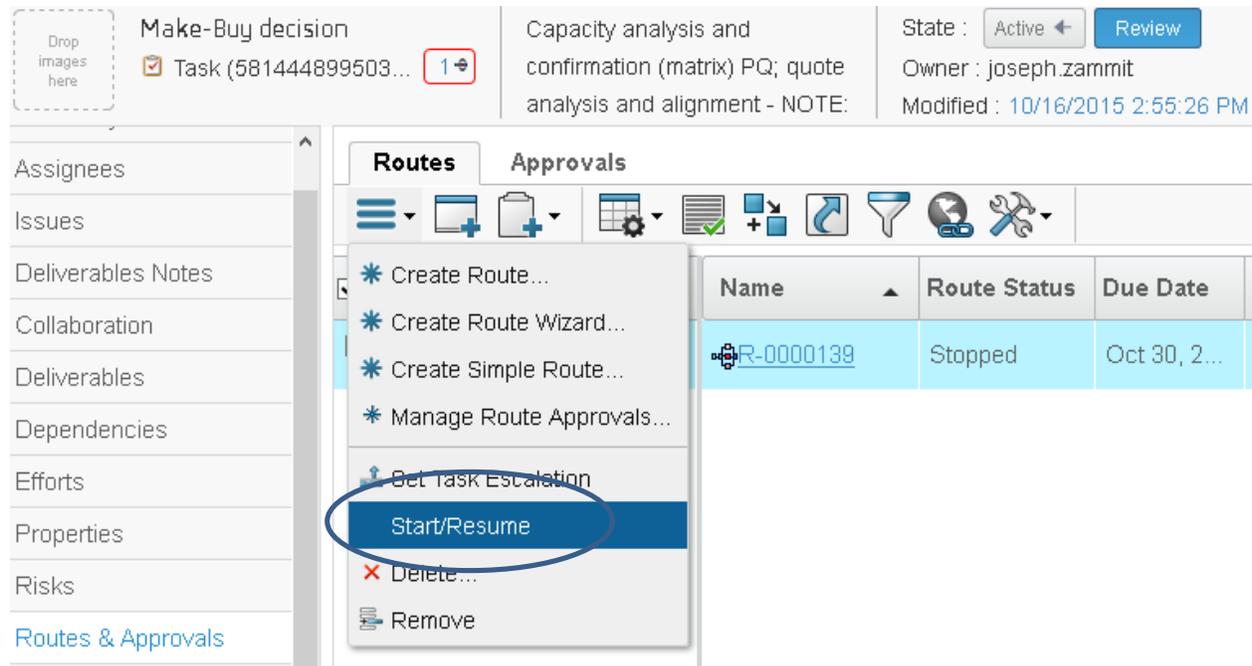
[Reject](#) [Cancel](#)

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Status	Template		49

1.10.2.1 Tasks rejected

In case of rejection, task assignees that move the state to Review receive a notification with comments.

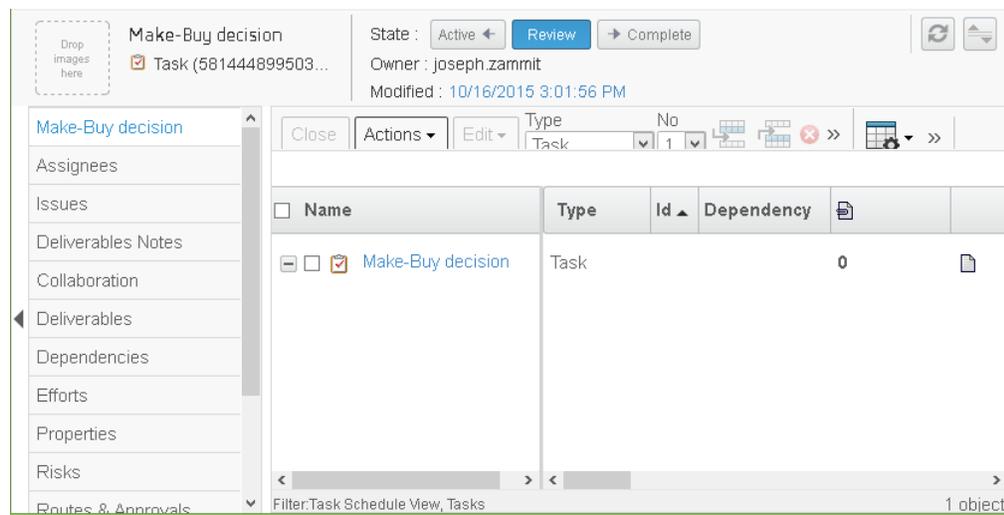
User has to complete the task and re-active the Route process. Select the command Route, select the route, then select the command Start/Resume from the Actions menu



1.10.2.2 Tasks approved

In case of approval, task assignees receive a notification with comments.

User has to move the task to state Complete



Version	1	Date:	18-April-2016
Status	Template		50

USR02 Open Issue Deck

Purpose	Define and manage project and task issues	Status	Define
Stakeholders	Project Users		
Beginning			
Interactions	Project Lead can create project issue; can also assign issue to project users. Project users can manage and close issues; users can create and manage task issues.		
End			
Constraints			

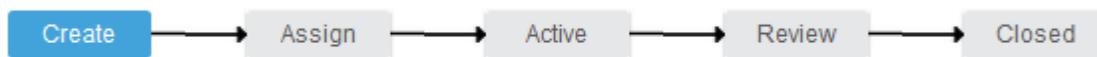
Project Lead can create issue at project level and can assign issue to users, in order to solve them.

Project Lead is able to view all issues related to a project: Issues table contains all issues connected to the project and all issues connected to the project tasks.

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

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



Version	1	Date:	18-April-2016
Status	Template		51

2.1 Update issues information

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

Name	Edit	Reported Against	Classification	Description	Visibility	Domain	Action Taken
ISS-0000129			Issue - A probl...	Check drawing from cust...	External	Des...	
ISS-0000137		P1	Issue - A probl...	test design	Internal	Des...	12.16.2015...
ISS-0000172		0000000050	Risk - Probabi...	Change for obsolesce...	Internal	-	

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		Visibility	Internal	Domain	
Classification	Risk - Probability of project damage needs planned mitigating actions				-
Description	Change for obsolescence				
Priority	Low	Estimated Finish	Jan 28, 2016	Approver	

Buttons: Done, Cancel

The other information is managed by Project Lead.

Every time an issue assignee updates the Action Taken field, the system completes automatically the field with user name and date.

% Complete: 10

Action Taken: Design started

Issue Details		Visibility	Internal	Domain	
Action Taken	04.18.2016;Matthew Spiteri;Design started				
Classification	Risk - Probability of project damage needs planned mitigating actions				
Description	Change for obsolescence				
Priority	Low	Estimated Finish	Jan 28, 2016	Approver	

Version	1	Date:	18-April-2016
Status	Template		52

2.2 Issues Deliverables

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

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

Step 1: click on number related to issue deliverables

Name	Edit	Reported Against	Classification	Description
ISS-0000129		0	Issue - Aprobl...	Check draw
ISS-0000137		0	P1 Issue - Aprobl...	test design
ISS-0000172		0000000050	Risk - Probabi...	Change for

The system opens a window with documents related to issue.

Step 2: use drag & drop feature or create new document using command contained in Action menu

ISS-0000137 test design State: Assign ← Active → Review
 Owner: Test Everything
 Modified: Dec 16, 2015 9:55:21 AM

Rev	Ver	Type	Actions	Description	Document Approver Role
No Objects Found					

Version	1	Date:	18-April-2016
Status	Template		53

About document creation or add an existing document, see chapters Create new Document and Add Existing Document in Working with Deliverables.

In order to create a new document using the drag & drop feature, user can select a file from the file system



and drop it with the mouse over the  icon related to the specific folder. Then release the mouse in order to start the document encoding. The icon becomes orange

When definition is complete, the system updates the table with new document; user can update and release the document selecting the link related to document name (see chapter Working with Deliverables)

Name	Title	Rev	Ver	Type	Actions	Description	Document Approver Role
0/1	PLM implementation.pptx	0	1	Document			

Version	1	Date:	18-April-2016
Status	Template		54

2.3 Issue Assignees

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

The screenshot shows the 'Assignees' panel on the right side of the issue details page. The panel includes a toolbar with a plus icon circled in blue, a list of current assignees, and a table with columns for Name, User Name, and Company. The current assignee listed is Joseph Zammit.

Name	User Name	Company
Joseph Zammit	joseph.zammit	METHODE ELECTRONICS

Or using the Edit plus icon in the Assignee panel

The screenshot shows the 'Assignees' panel on the right side of the issue details page. The plus icon in the toolbar is circled in blue. The table below shows the current assignee.

Name	User Name
Joseph Zammit	joseph.zammit

The system opens a search window; user can select addition assignees and select command Done

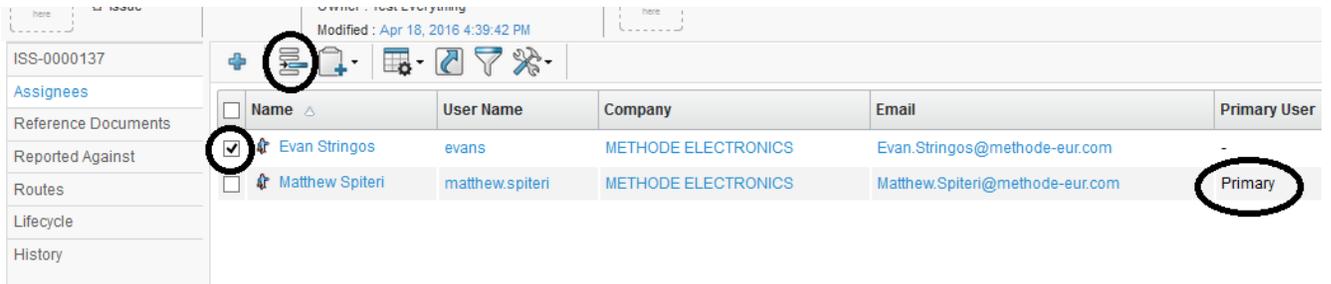
The screenshot shows a search window with a list of assignees. The 'Evan Stringos' entry is selected, and the 'Done' button is circled in blue. The search results table is as follows:

Name	User Name	Company
<input type="checkbox"/> David Debono	davidd	METHODE ELECTRONICS
<input type="checkbox"/> David Zammit	DavidZ	METHODE ELECTRONICS
<input type="checkbox"/> Edward Gingell	Edward.Gingell	METHODE ELECTRONICS
<input type="checkbox"/> Elias Moussa	elias.moussa	METHODE ELECTRONICS
<input checked="" type="checkbox"/> Evan Stringos	evans	METHODE ELECTRONICS
<input type="checkbox"/> Eugenio Vella	Gino.vella	METHODE ELECTRONICS
<input type="checkbox"/> Giuseppe Loreto	giuseppe.loreto	METHODE ELECTRONICS
<input type="checkbox"/> Gregory Joslin	Gregory	METHODE ELECTRONICS
<input type="checkbox"/> Jason Giordmaina	jasong	METHODE ELECTRONICS
<input type="checkbox"/> Jessica Camilleri	jessicac	METHODE ELECTRONICS

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Status	Template		55

The issue assignee can remove users, only if not defined by Project Lead (in this case, the column Primary User value is Primary)

Select the user to remove as issue assignee and select icon : if selected user is not a primary user, the system removes the assignment, otherwise the system prompts an error message



ISS-0000137
Modified : Apr 18, 2016 4:39:42 PM

Name	User Name	Company	Email	Primary User
<input checked="" type="checkbox"/> Evan Stringos	evans	METHODE ELECTRONICS	Evan.Stringos@methode-eur.com	-
<input type="checkbox"/> Matthew Spiteri	matthew.spiteri	METHODE ELECTRONICS	Matthew.Spiteri@methode-eur.com	Primary

Version	1	Date:	18-April-2016
Status	Template		56

2.4 Issue closure and approval process

Project Lead can create and update Issue, in order to define if issue has to be approved by a user different from users involved in issue closure. If not specified, the issue can be closed by issue assignees.

The issue table contains a column with Approver user.

Tasks Issues Approval Tasks Approval Issues Projects My Calendar Messages									
Home Home RFQ User Home Engineering User Home Change Management User Issues Summary Shortcuts... Collections Subscriptions									
Name	Visibility	Domain	Action Taken	Priority	% Complete	Approver	Estimated Finish	Actual Start	Actual Finish
<input type="checkbox"/> ISS-0000129	External	Design		Low	0				Oct 3...
<input type="checkbox"/> ISS-0000137	Internal	Design	12.16.2015...	Medium	10	Johann Barbara			Nov ... Dec
<input type="checkbox"/> ISS-0000172	Internal	-		Low	0				Jan ...

The information is available also during the issue update

Edit Issue Details

Fields in red italics are required

% Complete:

Action Taken:

Issue Details

Action Taken: 12.16.2015;Matthew Spiteri;I m styar to wokr on tyhis issue

Classification: Issue - A problem that requires action to resolve

Description: test design

Priority: Medium

Visibility: Internal

Domain: Design

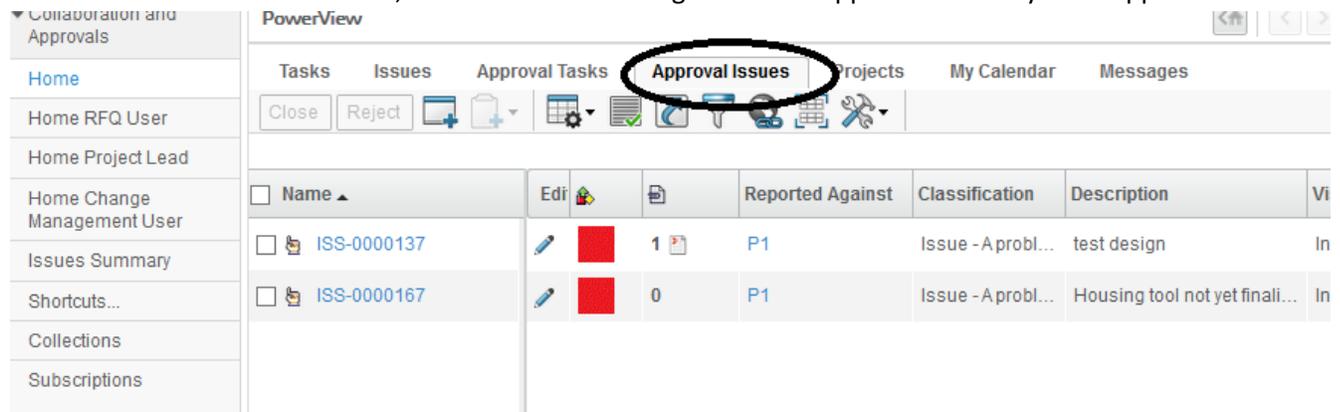
Estimated Finish: Nov 30, 2015

Approver: Barbara, Johann

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. In both cases, the Issue table is updated, removing the issue closed.

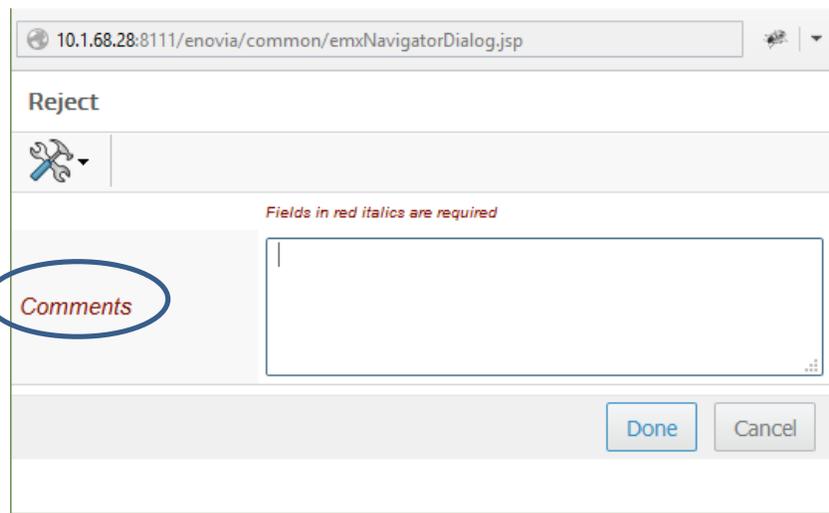
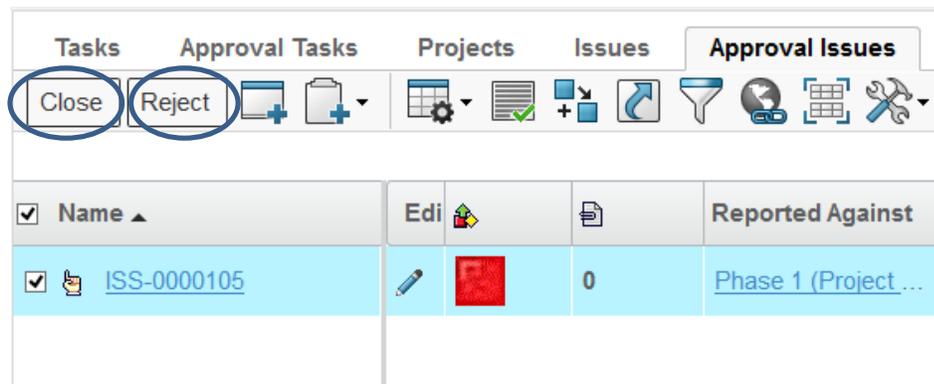
Version	1	Date:	18-April-2016
Status	Template		57

If issue is moved to state Review, the issue will be managed in table Approval Issues by issue approver.



The approver can view the issue information and can download the files uploaded by issue assignees.

The approver can close or reject the issue: user has to select the checkbox related to issues and select command Close or Reject; in case of reject, a comment is mandatory.



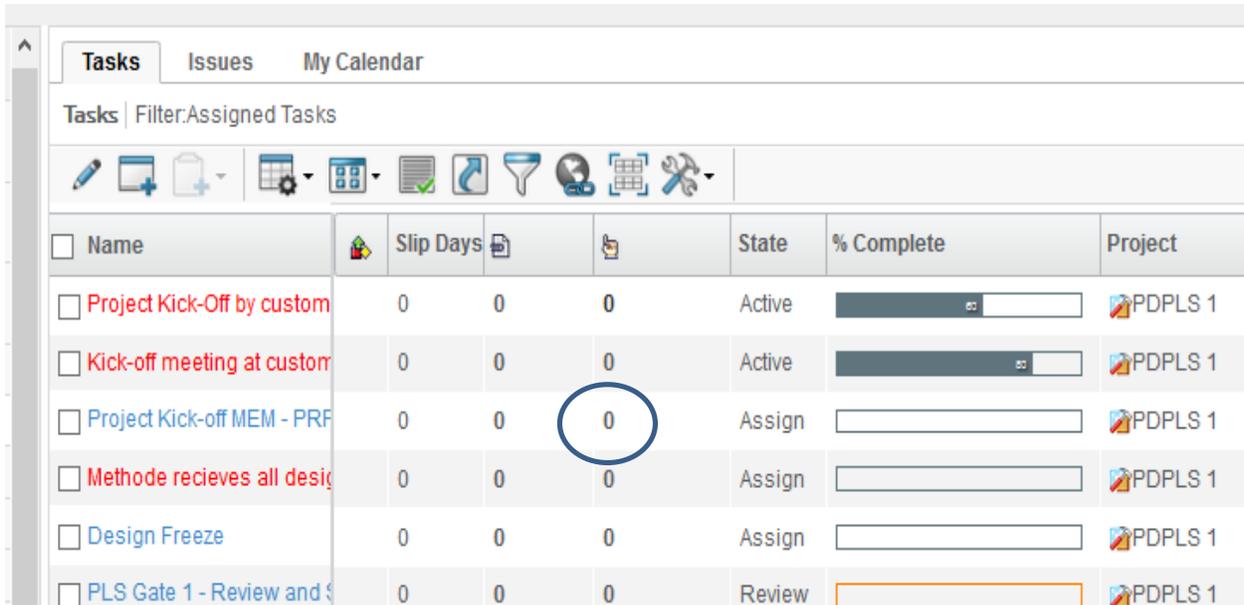
In this case, the issue state will be changed in Active with % Complete sets to 10. The issue assignee will see the issue in table Issue.

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Status	Template		58

2.5 Tasks Issues

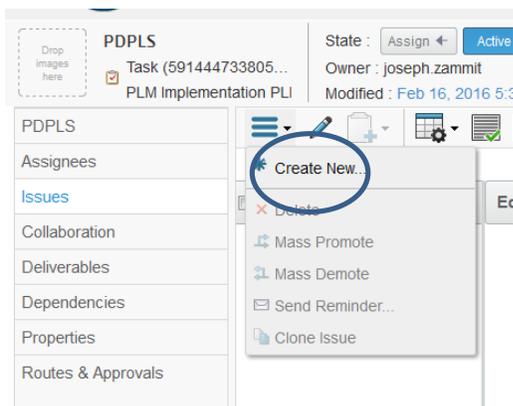
Task assignees can create issues related to tasks:

Using the  icon in the table Tasks, user can create an issue.



Name	Slip Days		State	% Complete	Project
Project Kick-Off by custom	0	0	Active	0	PDPLS 1
Kick-off meeting at custom	0	0	Active	0	PDPLS 1
Project Kick-off MEM - PRF	0	0	Assign		PDPLS 1
Methode recieves all design	0	0	Assign		PDPLS 1
Design Freeze	0	0	Assign		PDPLS 1
PLS Gate 1 - Review and S	0	0	Review		PDPLS 1

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



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The user sets up the fields and then clicks Done (only the Estimated Finish is mandatory)

The form is similar to one used by Project Lead, during creation of an issue at project level; the difference is related to the assignee and approver fields, that are missing because is responsibility to Project Lead defines the issue assignee and approver.

After issue creation, the issue table is updated.

Name	Edit	Reported Against	Classification
ISS-0000186		PDPLS	Issue - A probl...

As soon as an issue is created, the Project Lead receives a notification about issue creation; the user is able to view the new issue using the same icon in the Project Schedule table.

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

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Status	Template		60

Therefore, also the table Issues is updated in order to view the new issue

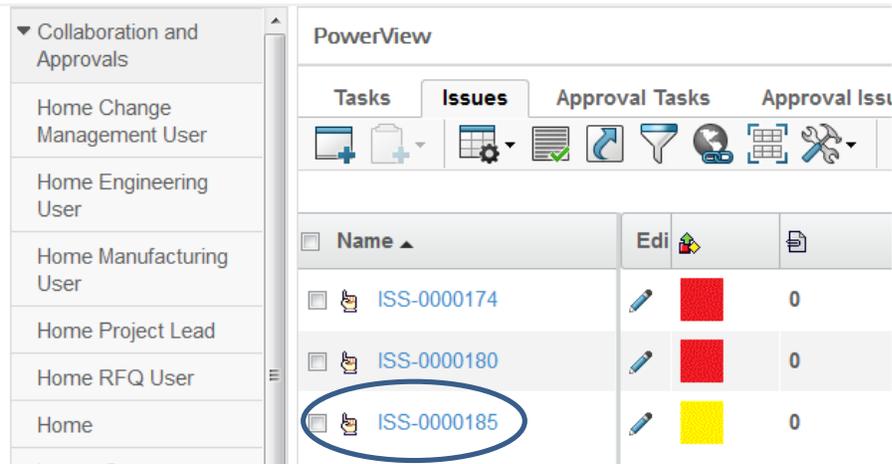
Modified : Apr 13, 2016 3:36:12 PM

P1	Issues		Meetings							
	Name ▲	Edi		Reported Against	Classification	Description	Visibility	Domain	Action T	
Details	<input type="checkbox"/> ISS-0000130			0	P1	Issue - A probl...	test design	External	Des...	11.12.20
Execution	<input type="checkbox"/> ISS-0000131			0	Make-Buy decision	Issue - A probl...	test design 2	External	Des...	
Folders	<input type="checkbox"/> ISS-0000134			0	Client ramp up p...	Issue - A probl...	Check drawing	Internal	Des...	
People	<input type="checkbox"/> ISS-0000137			1	P1	Issue - A probl...	test design	Internal	Des...	12.16.20
Schedule	<input type="checkbox"/> ISS-0000150			0	P1	Issue - A probl...	check the design	Internal	Des...	
Issues	<input type="checkbox"/> ISS-0000160			0	P1	Risk - Probabi...	test' test	Internal	Des...	

Version	1	Date:	18-April-2016
Status	Template		61

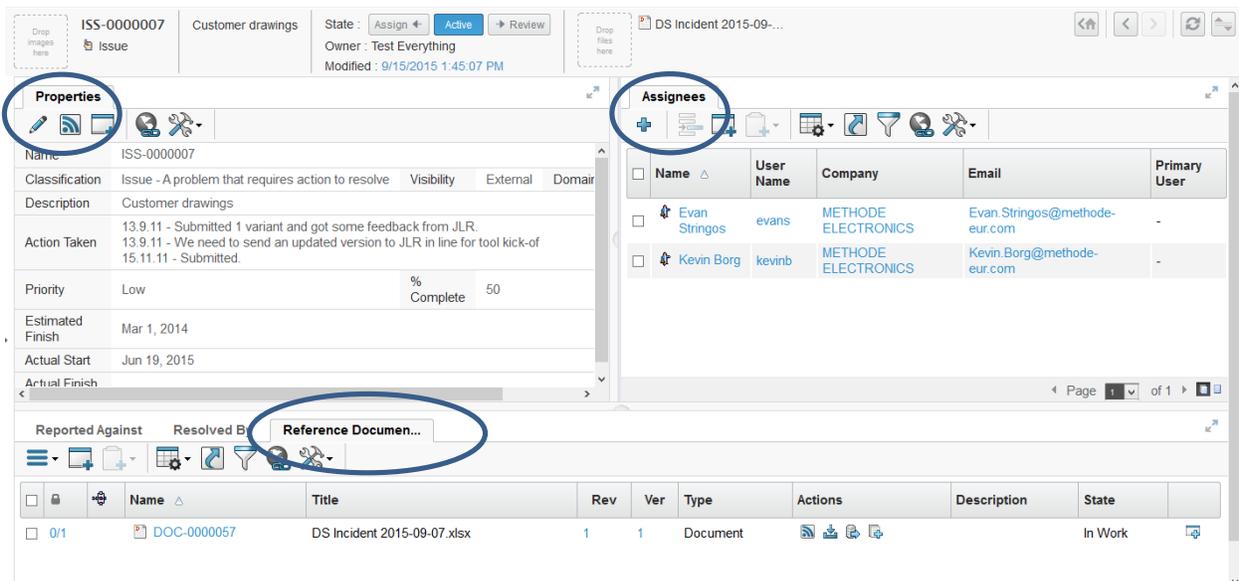
2.6 Issue details

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



The Issue view aggregates in one page and provides access to related items such as issue information, assignees, reference documents and reported against items (the project or the task affected by the issue).

See the previous chapters in order to manage information, assignees and documents.

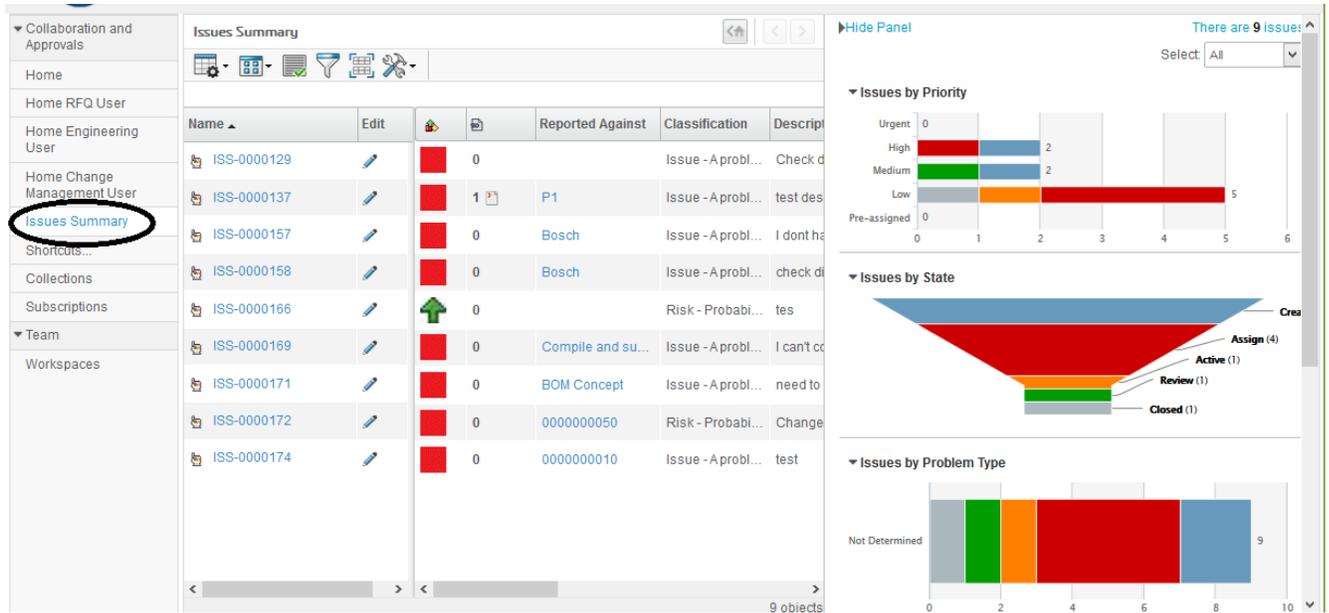


Version	1	Date:	18-April-2016
Status	Template		62

2.7 Issues Summary

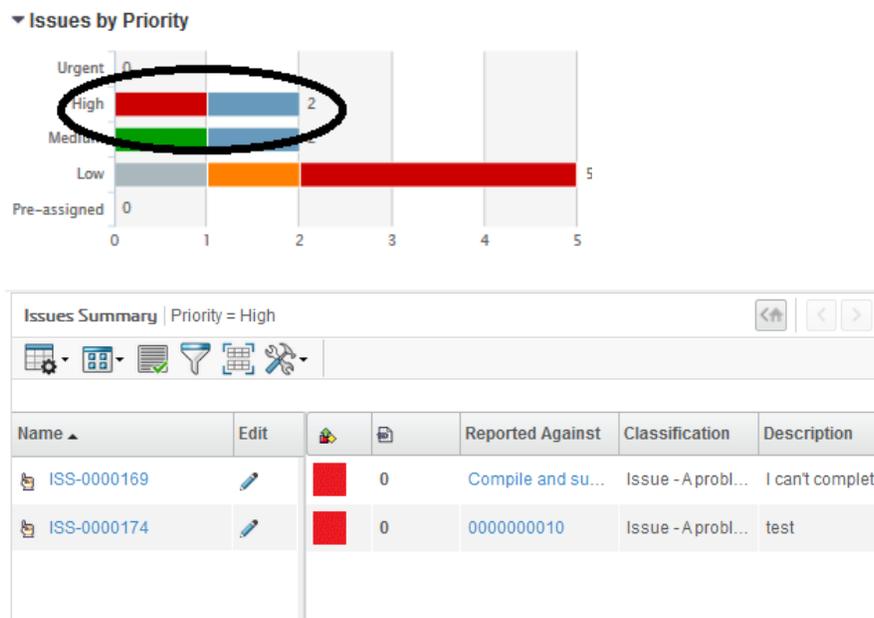
The Issue Summary shows all the Issues created or assigned to the user connected, also closed issues.

The table is equals to one used in table Issue contained in home page, whereas the content shows also issue created by user, even if managed by a Project Lead.



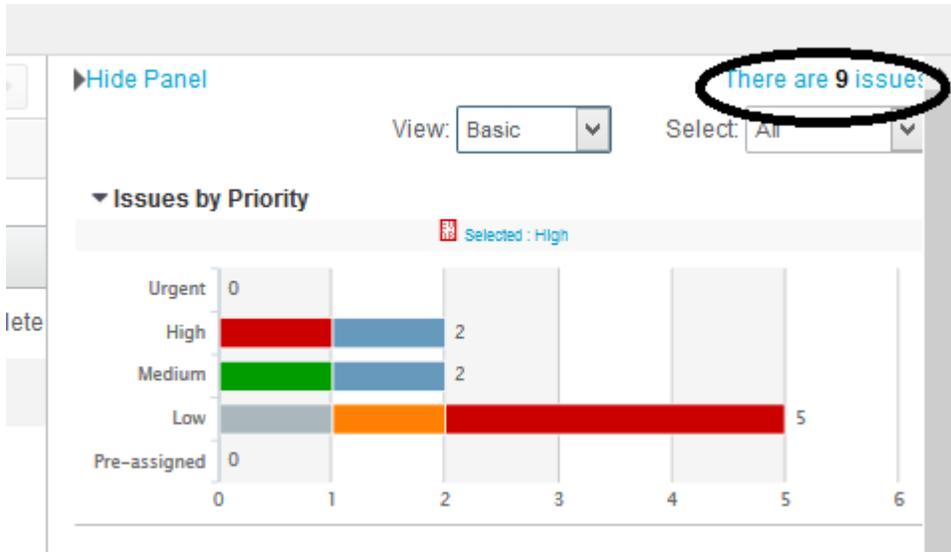
The user can filter issue list by Priority, State and Problem Type (currently not used), selecting the filter using the right portion of table

For example, selecting the bar High, the table will show only the 2 issues with Priority High



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In order to view all issues, select the link with total number of issues



In order to view the complete table, select the link "Hide Panel"

Issues Summary | Priority = High

Hide Panel

Issues by Priority

Name	Edit	Reported Against	Classification	Description
ISS-0000169		0	Compile and su...	Issue - A probl... I can't complete
ISS-0000174		0	000000010	Issue - A probl... test

Issues Summary

Name	Edit	Reported Against	Classification	Description	Visibility	Domain	Action Taken	Priority	% Complete	Approve
ISS-0000129		0		Issue - A probl... Check drawing from cust...	External	Design		Low	0	
ISS-0000137		1	P1	Issue - A probl... test design	Internal	Design	12.16.2015...	Medium	100	Johan...
ISS-0000157		0	Bosch	Issue - A probl... I dont have enough reso...	Internal	Design		Low	0	
ISS-0000158		0	Bosch	Issue - A probl... check dimensions	Internal	Quality		Low	0	Elias ...
ISS-0000166		0		Risk - Probabi... tes	Internal	-		Low	100	
ISS-0000169		0	Compile and su...	Issue - A probl... I can't complete the task i...	Internal	Design		High	0	
ISS-0000171		0	BOM Concept	Issue - A probl... need to speak to you	Internal	-		Medium	0	

Version	1	Date:	18-April-2016
Status	Template		64

USR03 Gate Management

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

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 by Project Lead.

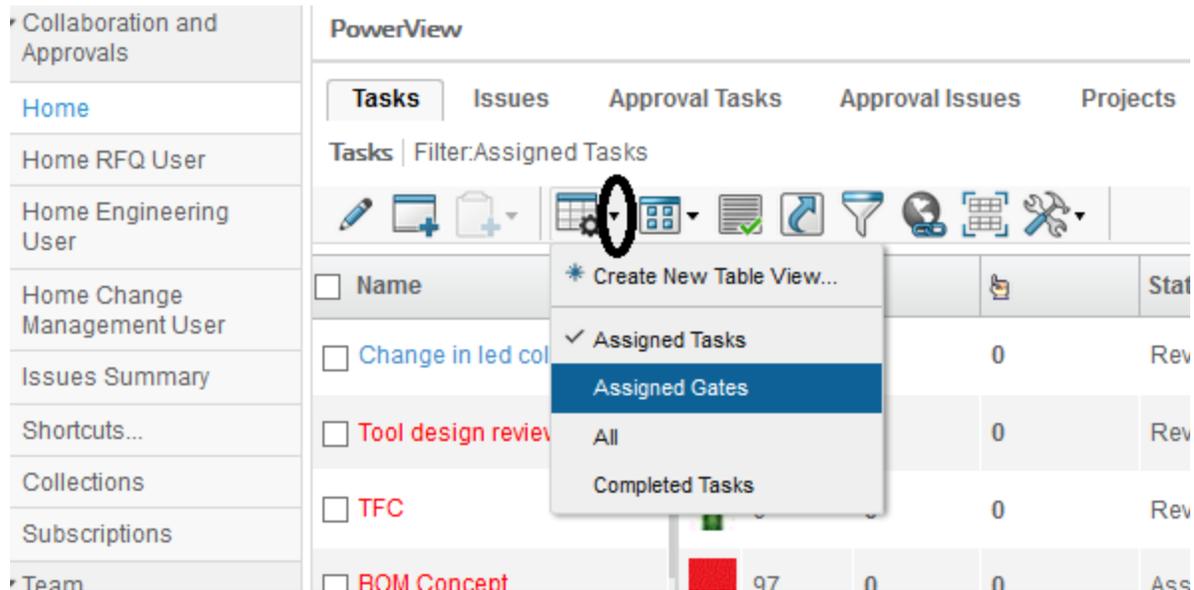
Project Lead can define people assigned to the gate (same functions described for tasks); they can be project members or from outside the project

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.

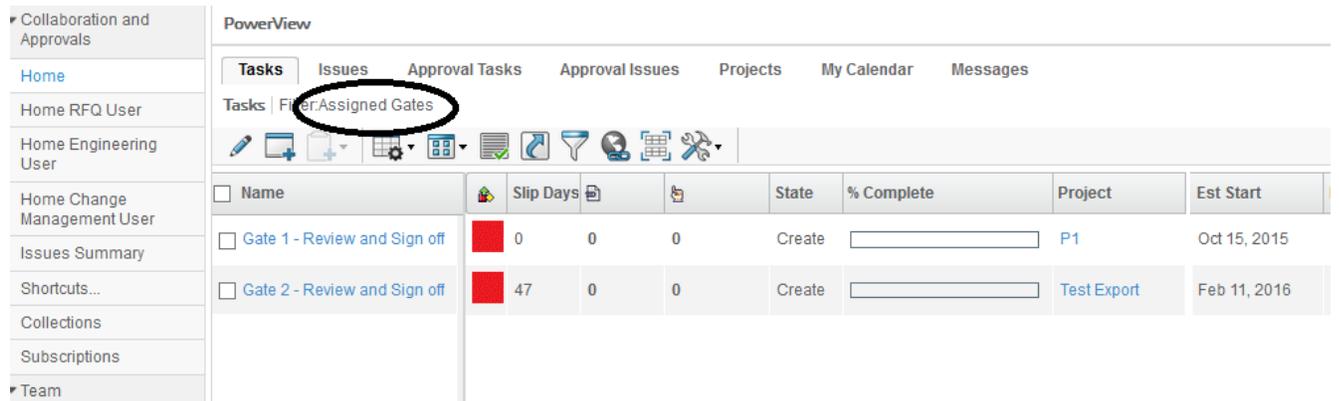
Version	1	Date:	18-April-2016
Status	Template		65

3.1 Gates assigned

Table Tasks shows the tasks assigned to user; selecting the filter, user can see all Gates assigned.



The table shows only Gates in state Create or Review.

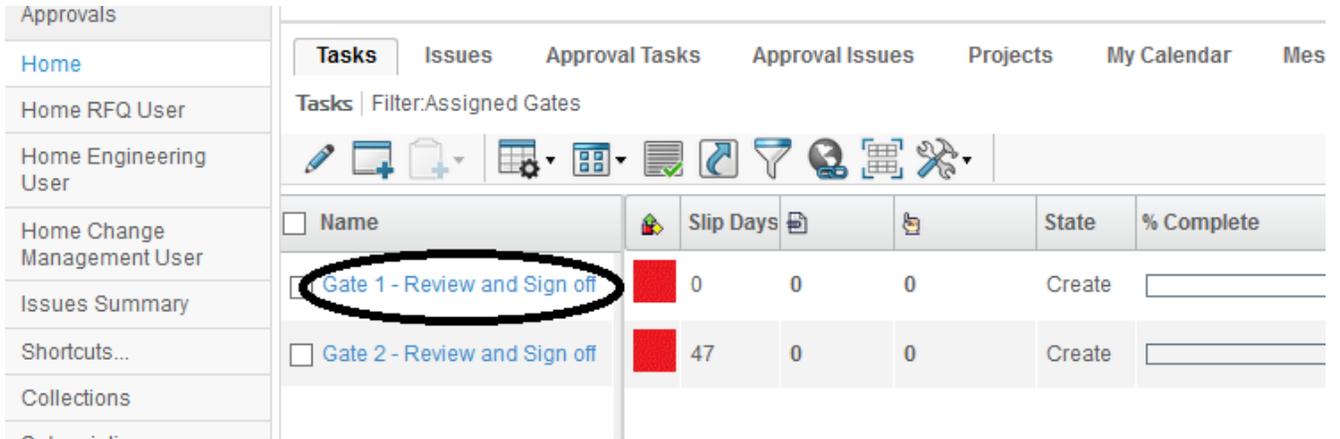


Version	1	Date:	18-April-2016
Status	Template		66

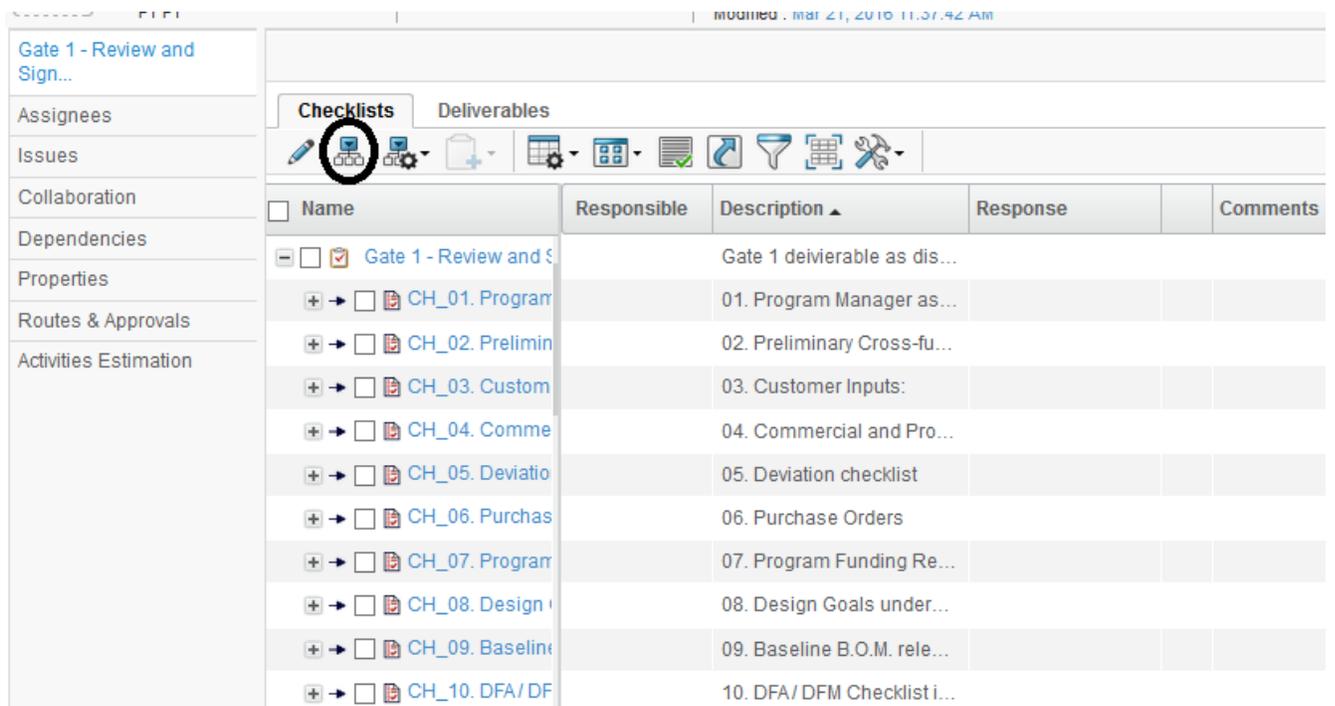
3.2 Gate Checklist Item

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.

Gate assignee has to select the link related to Gate to update

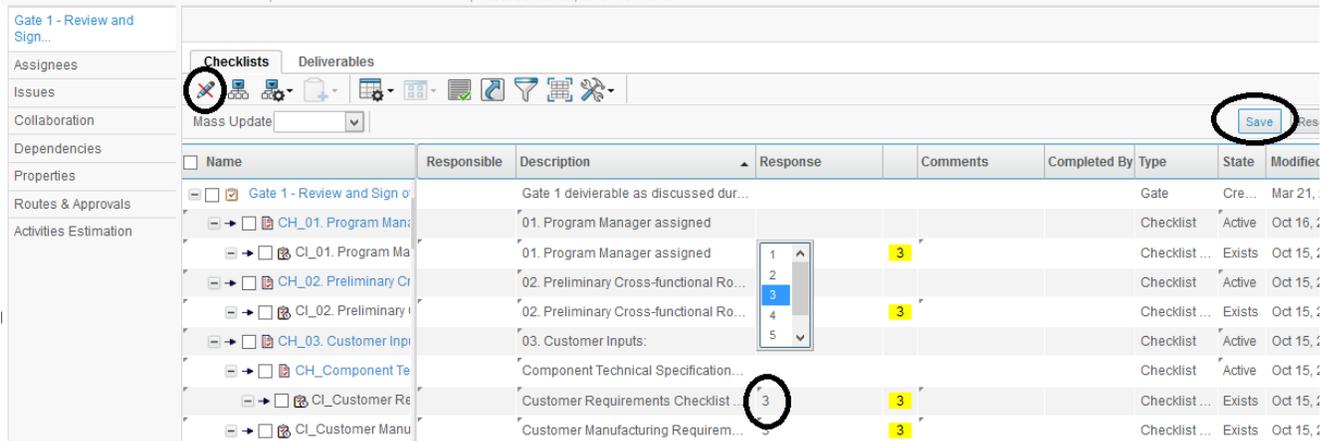


The system opens a window with all checklists defined in the Gate; user has to select the icon Expand to view all checklist items



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Status	Template		67

User has to select the icon Edit and enter the Response value and optionally a comment; click on command Save.



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

Response	Com
3	3
3	3
3	3
4	4
1	1
1	1
5	5

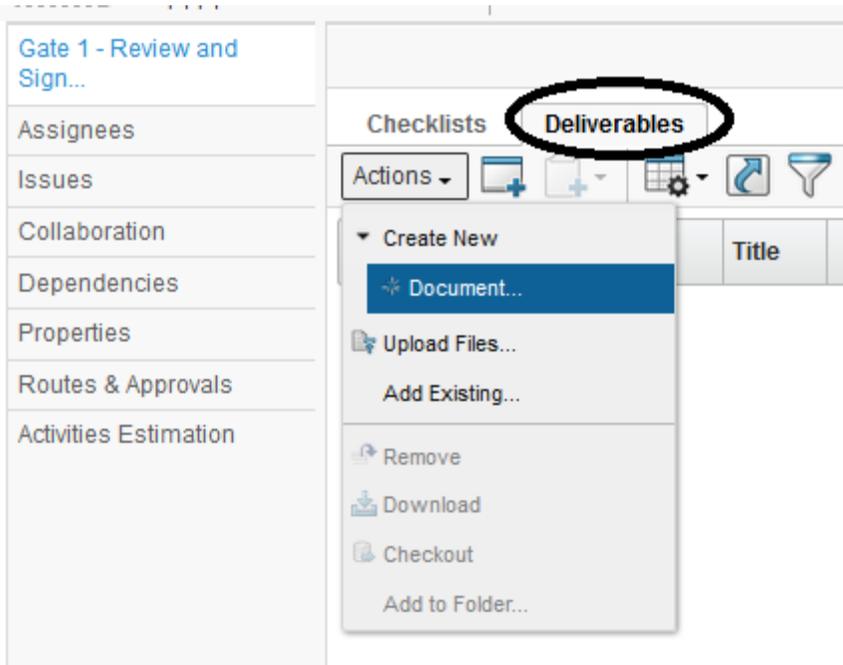
The checklist items are related to different departments; Gate assignees are responsible to update the response values related to own department.

Project Lead can enter a responsible for each checklist items, even if not mandatory.

Version	1	Date:	18-April-2016
Status	Template		68

3.3 Gate Deliverables

During a gate review, deliverables can be defined; the functions are the same described for tasks (see chapter Working with Deliverables)



Version	1	Date:	18-April-2016
Status	Template		69

3.4 Gate Approval

Gate assignee is responsible to approve the gate and the checklist content

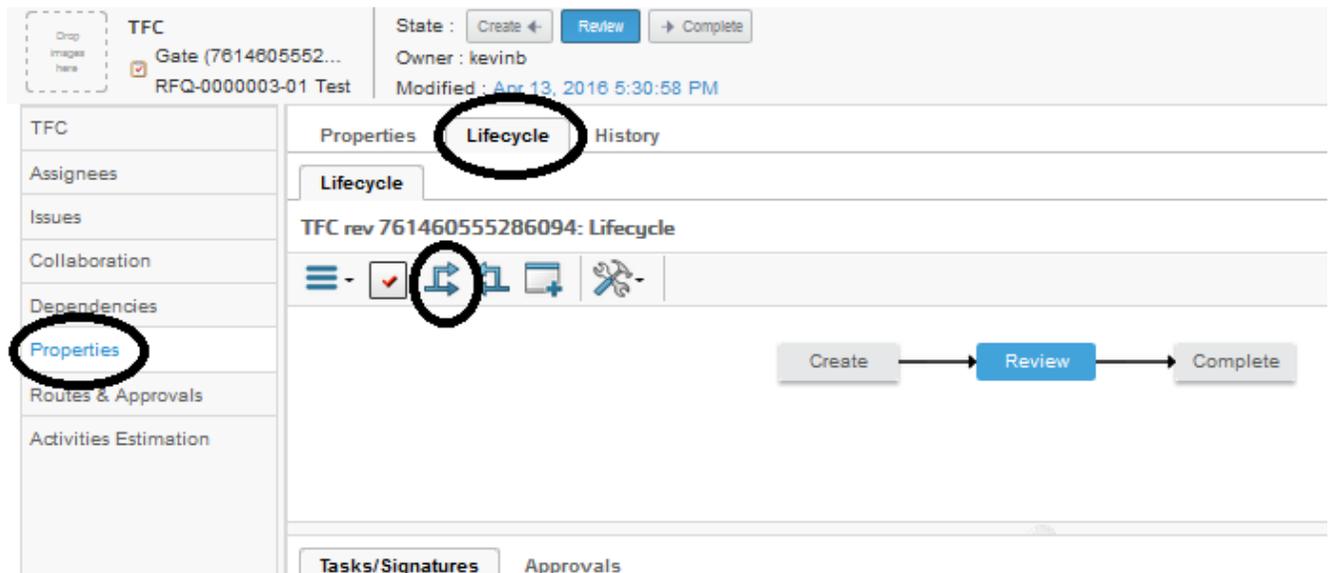
In order to approve the gate, the user has to promote the gate to state Complete.

There are two options available:

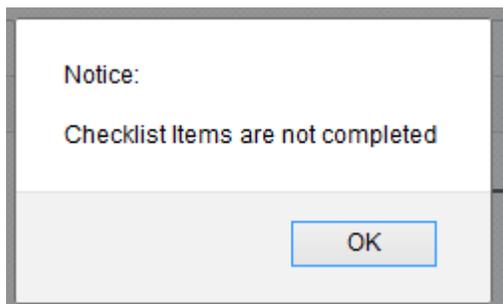
- Use the dedicated icon contained in Gate header



- Use the command available in Lifecycle tab



The system checks that all checklist items responses have been entered, otherwise the promote is avoid



Version	1	Date:	18-April-2016
Status	Template		70

The Gate assignee is responsible to create an approval process if gate content has to be evaluated.

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

- Select command «Routes and Approvals»
- Select one of the commands available in Action menus
- Create Route: this process allows Gate assignee to select a Route Template, if a predefined list of users is defined; task description is equals to all users and task execution is in parallel
- Create Route Wizard: this process allows Gate assignee to specify each task and people involved: user can select people from a template or from a query, can specify for each user a different task description, can select task execution in parallel or sequential
- Create Simple Route: this process is the simplest one: Gate assignee can select a list of people from a query (Change Coordinator can define a Member List if a predefined list of users is defined) and a Due Date; task description is equals to all users and task execution is in parallel
- Manage Route Approvals: this process allows Gate assignee to select a Route Template, if a predefined list of users is defined; task description is equals to all users and task execution is in parallel

3.4.1 Create Route

CR-0000117|Create Route |

 *Fields in red italics are required*

Type Route

Name AutoName

Template [Clear](#)

Description

Review CN

Route Base Purpose ▼

Scope
 All
 Organization

Route Completion Action ▼

Auto Stop On Rejection ▼

Attribute details:

Version	1	Date:	18-April-2016
Status	Template		71

- Route Name: autaname is provided

Fields in red italics are required

Type: Route

Name: AutoName

- Template: select the list of users involved in approval process (the templates are defined by PLM Administrator)

Search Refinement: By State: TRUE, State: Active

Search Results: 1 - 11 of approx. 11 Results | Page Size: 50 (Max Value: 1000)

Name	Revision	Description
<input type="radio"/> CN approve test	1	CN approve test
<input type="radio"/> CN Change Request CM	1	CN Change Request CM Approval
<input type="radio"/> CN Change Request LM.	1	CN Change Request LM Approval
<input checked="" type="radio"/> CN Review Content	1	CN Review Content
<input type="radio"/> Deviation Approval	1	Deviation Approval
<input type="radio"/> EBOM Approve	1	EBOM Approve
<input type="radio"/> EBOM Review	1	EBOM Review
<input type="radio"/> GATE Approve	1	GATE Approve
<input type="radio"/> GATE approve test	1	GATE approve test
<input type="radio"/> MBOM Approve	1	MBOM Approve
<input type="radio"/> MBOM approve test	1	MBOM approve test

Submit

- Description is mandatory
- Route Base Purpose: select Review because the route is used to add information, not for an approval

Route Base Purpose: Review

Options: Approval, Review, Standard

- Scope: determines who can be added to route tasks; leave All or Organization
- Route Completion Action: select Notify Route Owner because the route is for review, not for an approval (option "Promote Connected Object" will be used in route for approval)

Route Completion Action: Notify Route Owner

Options: Notify Route Owner, Promote Connected Object

Version	1	Date:	18-April-2016
Status	Template		72

- Auto Stop On Rejection: if a user involved in route doesn't approve the task, all other tasks are closed (Immediate) or have to be evaluated (Deferred)

Auto Stop On Rejection	Immediate ▼
	Immediate
	Deferred

The route created is not started automatically

Test for process | State: Create ← Evaluate → In Review | Risk Assessment title(...)

Owner: joe.budgeja
Modified: Mar 18, 2016 3:04:23 PM

Properties | Process Details | Affected Items | Change Actions | Reference Documen... | Review | **Routes** | Hist

Name	Route Status	Due Date	Descripti
R-0000258	Not Started		CN Revie

3.4.2 Create Route Wizard

The process is composed by 4 steps:

- Define route type and if route has to be executed immediately
- Define people involved
- Define tasks
- Define approval for concurrent tasks

Define route details

Version	1	Date:	18-April-2016
Status	Template		73

Step 1 of 4: Specify Details

Add Content Remove Selected

Fields in red Italics are required.

Name AutoName

Template ... Clear

Description

Route Base Purpose Standard ▾

Scope All
 Organization
 Select Scope ...

Route Completion Action Notify Route Owner ▾

Start Route Upon Wizard Completion
 Manually

Auto Stop On Rejection Immediate ▾

Content

<input type="checkbox"/>	Name	Rev	Ver	State Condition
<input type="checkbox"/>	CR-0000163	-		Evaluate ▾

Next Cancel

Attribute details (other than attributes described in “Create Route”)

- Start Route: select Upon Wizard Completion to start route immediately after route creation; select Manually if Gate assignee wants to adjust tasks and people involved

Version	1	Date:	18-April-2016
Status	Template		74

There is also a section related to route contents, that is used to approve or review different objects (not used for Gate approval)

10.1.68.28:8111/3dspace/components/emxRouteWizardCreateDialogFS.jsp?templateId=null&template=&objectId=;

Step 1 of 4: Specify Details

Add Content Remove Selected

Fields in red Italics are required.

Content

<input type="checkbox"/>	Name	Rev	Ver	State Condition
<input type="checkbox"/>	CR-0000163	-		Evaluate

Next Cancel

Define people involved: select command Next.

If a template was selected in first page, the user contained in template definition are already added to route definition

Step 2 of 4: Select Route Members

Actions

<input type="checkbox"/>	Name	Type	Organization	Scope	Access
<input type="checkbox"/>	Barbara, Johann	Person	METHODE ELECTRONICS	All	Add Remove
<input type="checkbox"/>	Spiteri, Matthew	Person	METHODE ELECTRONICS	All	Add Remove

Previous Next Cancel

Gate assignee can add users using commands contained in Actions menu.

Version	1	Date:	18-April-2016
Status	Template		75

Step 2 of 4: Select Route Members

Actions 

- ▾ Add People
- ▢ Add Role
- ▢ Add Group
- ▢ Add Member List
- ▢ Remove Selected

Type	Organization	Scope	Access
Person	METHODE ELECTRONICS	All	Add Remove ▾
Person	METHODE ELECTRONICS	All	Add Remove ▾

- Read
- Read Write
- Add
- Remove
- Add Remove

javascript:void(0) Previous Next Cancel

Version	1	Date:	18-April-2016
Status	Template		76

Define tasks: select command Next

For each user defined in previous page, a route task is created.

Step 3 of 4: Define Route Tasks

Actions 

<input type="checkbox"/>	Title, Action & Order	Assignee & Instructions	Due Date & Time (EDT)
<input type="checkbox"/>	<input type="text"/> Action Comment <input type="text"/> Order 1 <input type="text"/>	Grima, Samantha <input type="text"/> <input type="text"/>	<input checked="" type="radio"/> <input type="text"/>  5:00 PM <input type="text"/> Clear Advanced <input type="radio"/> <input type="text"/> day(s) from Route Start Date <input type="text"/> <input type="radio"/> Assignee-Set Due Date <input type="checkbox"/> Allow Delegation <input type="checkbox"/> Requires Owner Review
<input type="checkbox"/>	Review CN Action Comment <input type="text"/> Order 1 <input type="text"/>	Spiteri, Matthew <input type="text"/> Review CN <input type="text"/>	<input type="radio"/> <input type="text"/>  5:00 PM <input type="text"/> Clear Advanced <input type="radio"/> <input type="text"/> day(s) from Route Start Date <input type="text"/> <input checked="" type="radio"/> Assignee-Set Due Date <input checked="" type="checkbox"/> Allow Delegation <input type="checkbox"/> Requires Owner Review
<input type="checkbox"/>	Review CN Action Comment <input type="text"/> Order 1 <input type="text"/>	Barbara, Johann <input type="text"/> Review CN <input type="text"/>	<input type="radio"/> <input type="text"/>  5:00 PM <input type="text"/> Clear Advanced <input type="radio"/> <input type="text"/> day(s) from Route Start Date <input type="text"/>

Previous **Next** Cancel

For each route task, Gate assignee has to define:

- Title and instructions: mandatory; the attributes are already defined for tasks created from template; for other task, values are to be defined
- Action: in case of route of type Review, action is Comment
- Order: default value 1 means all tasks are executed in parallel; defining different orders means define dependencies between route tasks
- Due Date and Time: estimated finish date
 - o Can be defined as a date

Version	1	Date:	18-April-2016
Status	Template		77

 5:00 PM
[Clear](#)

- A number of slip days after route start date

day(s) from

- When the route start
 - Assignee-Set Due Date

- Change Coordinator can define if task can be delegated

Allow Delegation
 Review

- Gate assignee can define if it's necessary another review by Gate assignee in order to complete the task (not used in case of route of Gates, like in this case)

Requires Owner

Define approval for concurrent tasks: select command Next

Step 4 of 4: Action Required



Order	Name	Action	Action Required
1	Review CN	Comment	<input type="radio"/> Any <input checked="" type="radio"/> All
1	Review CN	Comment	
1	Review CN	Comment	

- Any: when one person completes a task in the set of concurrent tasks, all other tasks with same order level are deleted.
- All: all tasks in the set of concurrent tasks must be completed

Version	1	Date:	18-April-2016
Status	Template		78

3.4.3 Create Simple Route

Create Simple Route

Add Content
Remove Selected

Fields in red italics are required.

Route Details

Instructions

Action

Comment
▼

Due Date

📅

Start Route Immediately

Allow Delegation

Route Task Recipients

Add Role

Add Group

Add People

Add Member List

Properties
 Remove

Content

	<i>Name</i>	Rev	Ver	State Condition
<input type="checkbox"/>	CR-0000163	-		Evaluate ▼

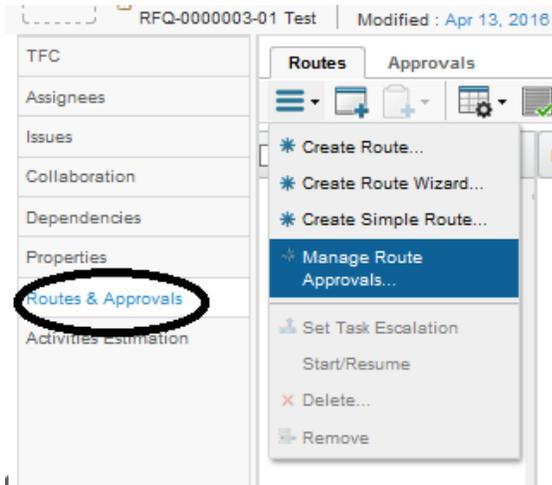
Done
Cancel

Attribute details:

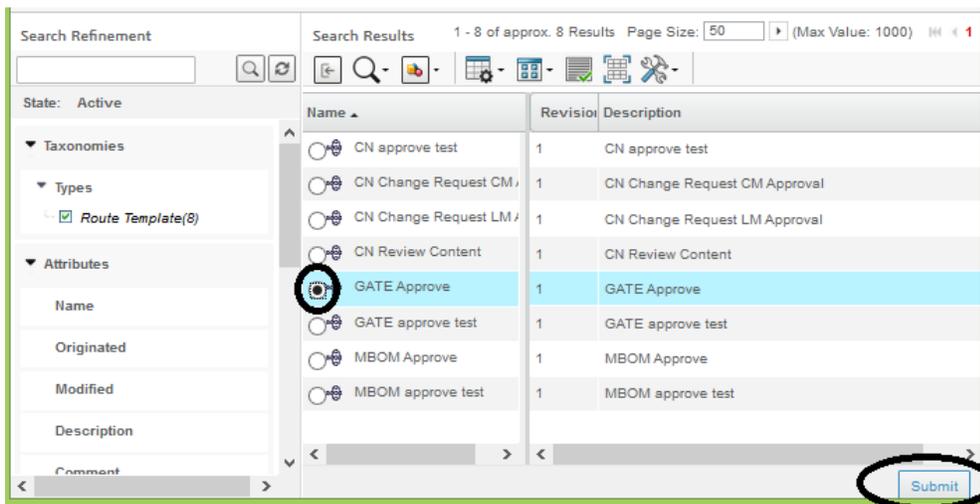
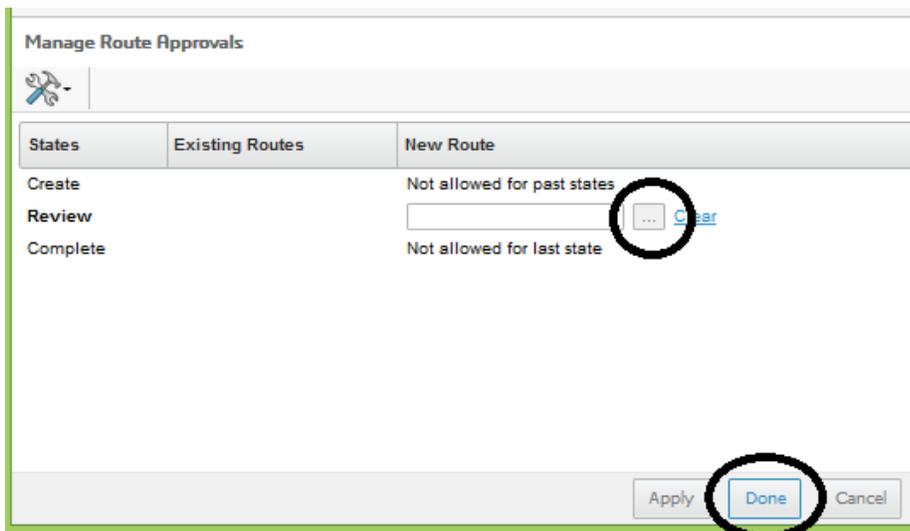
- Instructions: description of task
- Action: Comment, Approve, Standard; in this case, select Approve
- Due Date: estimated finish date for all tasks
- Start Route Immediately: if selected, route starts after user select command Done, otherwise has to be started manually
- Allow Delegation: if people involved can delegate tasks
- Route Task Recipients: Gate assignee can use the command Add Role, Add Group, Add People and Add member List in order to define people involved

Version	1	Date:	18-April-2016
Status	Template		79

3.4.4 Manage Route Approvals



Define a Route between states Review and Complete, using a Route Template call GATE Approve.



Version	1	Date:	18-April-2016
Status	Template		80

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

Name	Approver	Title	Approval Status	Approval/Due Date	Comments/Instructions
IT-0000040	LT Senior Lab Technician(Role)	Approve Gate	Awaiting Approval		Approve Gate
IT-0000041	OM Senior Operations Manager(Role)	Approve Gate	Awaiting Approval		Approve Gate
IT-0000042	QE Senior Quality Engineer(Role)	Approve Gate	Awaiting Approval		Approve Gate
IT-0000035	AM Senior Account Manager(Role)	Approve Gate	Awaiting Approval		Approve Gate
IT-0000036	LM Senior Launch Manager(Role)	Approve Gate	Awaiting Approval		Approve Gate
IT-0000037	ME Senior Manufacturing Engineer(Role)	Approve Gate	Awaiting Approval		Approve Gate
IT-0000038	PDE Product Design Engineer(Role)	Approve Gate	Accept		Approve Gate
IT-0000039	PURCH Senior Purchasing(Role)	Approve Gate	Awaiting Approval		Approve Gate

As for task approval, each user involved has to approve or reject the Gate (if approval task is assigned to a role, all users belonging to role can accept and approve the task).

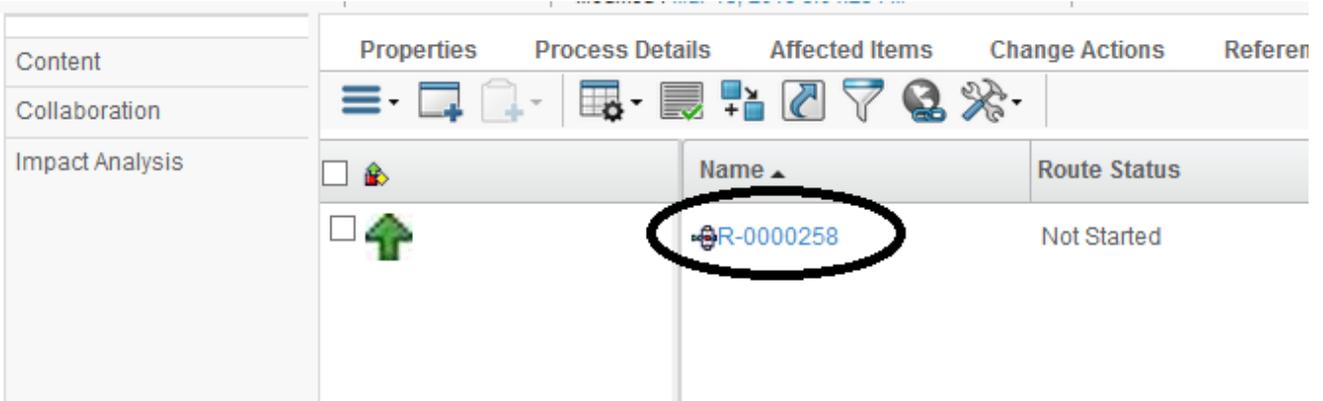
If the Gate is rejected, the Gate assignee can modify the checklist and resume the Route process

Version	1	Date:	18-April-2016
Status	Template		81

3.4.5 Update and start route manually

If route process is not started, Gate assignee can modify it in order to add or remove people involved, change route instruction and people access.

Select link related to route



The page with route details contains several tabs:

R-0000258 CN Review Content Owner : joe.budgeja Modified : Mar 18, 2016 3:35:47 PM

Route

R-0000258

Properties Content Access Discussions History

Name	R-0000258	State	Not Started
Owner	Joseph Bugeja	Scope	Organization
Description	CN Review Content	Template	CN Review Content
Originated	Mar 18, 2016	Route Base Purpose	Review
Route Completion Action	Notify Route Owner	Auto Stop On Rejection	Immediate

Tasks (Graphical) Tasks

R-0000258 : Tasks (Graphical)

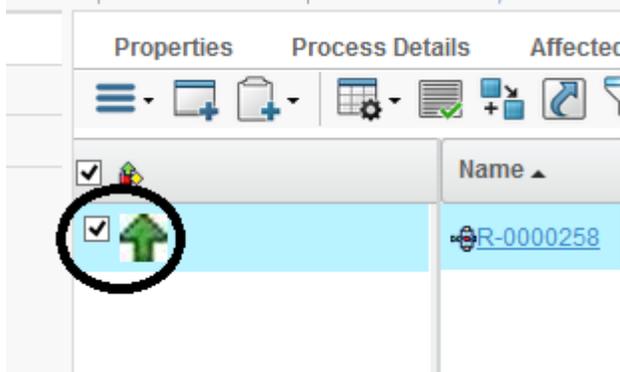
- Properties shows attribute details
- Content shows objects affected by route process (in this case, the Gate)
- Access shows people involved and allows Gate assignee to modify access and add people

Version	1	Date:	18-April-2016
Status	Template		82

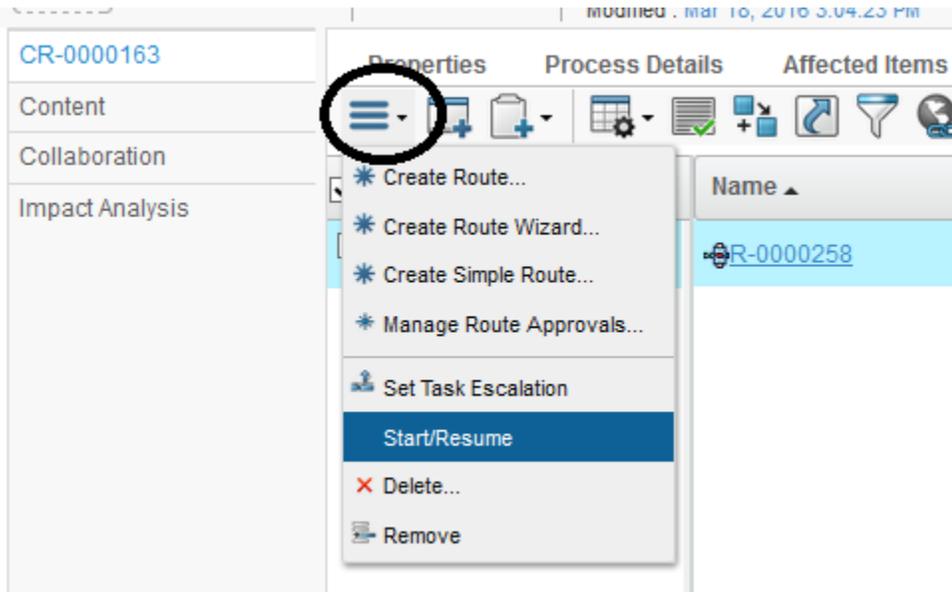
- Tasks shows tasks and people involved and allows Gate assignee to add people and tasks

To start manually a route, select tab Route and select checkbox related to route

In order to start the route and notify people involved, from tab Route select the checkbox related to route created



Select command Start/Resume from Actions menu



Gate assignee can also delete a route already created, in order to create another one with different people involved

Version	1	Date:	18-April-2016
Status	Template		83

USR04 Request for Quotations Tasks

Purpose	Users involved in RFQ have to provide an estimation	Status	Define
Stakeholders	Manager with Quotation tasks assigned		
Beginning	RFQ in status Quoting		
Interactions	Users can close the estimation tasks.		
End	Quotation tasks have the status Complete and an Estimated Duration completed		
Constraints			

During a request for Quotation process, Quoting Manager can assign tasks to managers, in order to provide estimation or in order to complete information like CBOMs, tools, timing plans, etc.

The estimation tasks are similar to project tasks, with some additional information (effort or duration, design center, etc.). Also the tasks completion is different.

4.1 RFQ01 Activities estimation

Purpose	Users involved in RFQ have to provide an estimation	Status	Define
Stakeholders	Manager with Quotation tasks assigned		
Beginning	RFQ has moved to status Quoting		
Interactions	Users involved are notified by email; each user can see tasks assigned using a Task dashboards or using a dedicated view in RFQ process. Users have to define Estimated Duration fields and complete the tasks.		
End	Quotation tasks have the status Complete and an Estimated Duration completed. Additional documents can be uploaded as task deliverables		
Constraints	CBOMs are completed; Quotation tasks have to be assigned to users		

Quotation tasks assigned to a specific user are available in Project Users command, tab Task. User can recognize the tasks related to a RFQ because RFQ project name starts with RFQ

Name	Slip Days	State	% Complete	Project	Est Start
BOM Concept	88	Assign		RFQ000009-01	Dec 16, 2015
Engineering Mechanical Res	88	Assign		RFQ000009-01	Dec 16, 2015
Modification of PCB size/des	86	Active		CN 0000166	Dec 18, 2015
PLS PHASE 4 - Production L	83	Active		P1	Oct 15, 2015
PFMEA + QCP for each tool a	69	Active		Tool1	Oct 23, 2015
Engineering Mechanical Res	60	Assign		RFQ-000016	Jan 25, 2016
BOM Concept	60	Assign		RFQ-000016...	Jan 19, 2016

Version	1	Date:	18-April-2016
Status	Template		84

Step 1 From Home page, select tab Tasks and select hyperlink related to task name in order to enter task estimation

<input type="checkbox"/> Name		Slip Days			State
<input type="checkbox"/> BOM Concept		88	0	0	Assign
<input type="checkbox"/> Engineering Mechanical Res		88	0	0	Assign
<input type="checkbox"/> Modification of PCB size/des		86	1	0	Active
<input type="checkbox"/> PLS PHASE 4 - Production L		83	0	0	Active
<input type="checkbox"/> PFMEA + QCP for each tool a		69	3	0	Active
<input checked="" type="checkbox"/> Engineering Mechanical Res		60	0	0	Assign
<input type="checkbox"/> BOM Concept		60	0	0	Assign

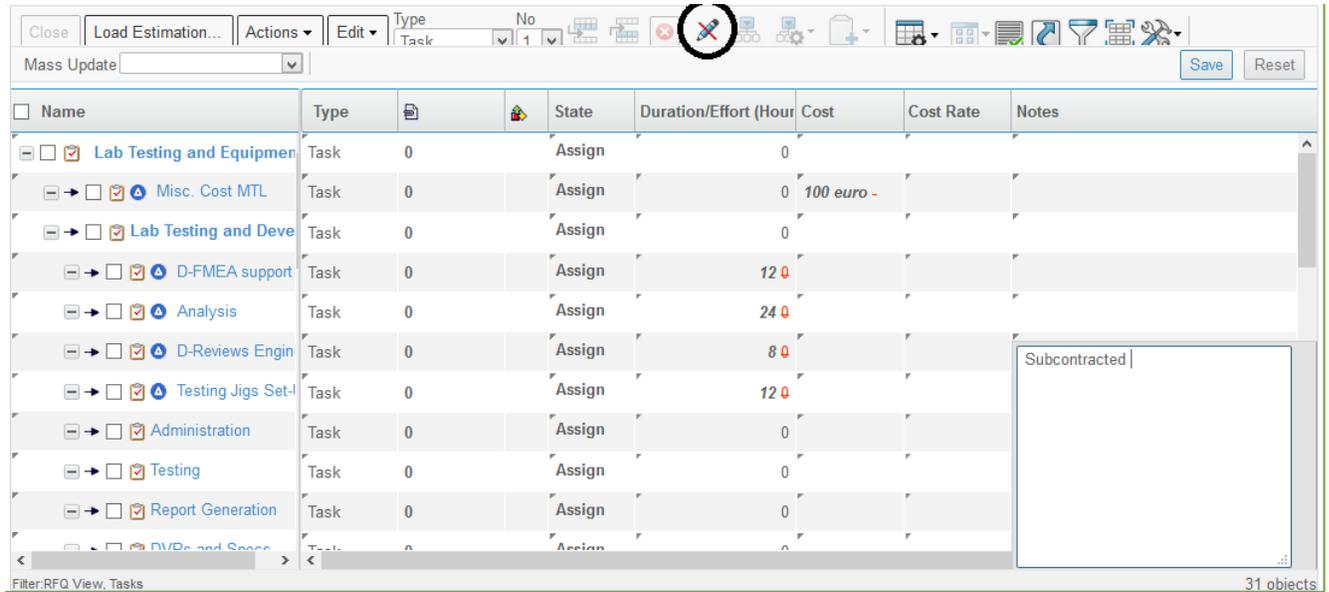
Step 2 Select icon Expand All in order to view all estimation tasks

The tasks related to RFQ use a table definition with specific columns: Duration/Effort in hour, Cost, Design Center and Notes

<input type="checkbox"/> Name	Type			State	Duration/Effort (Hour)	Cost	Design Cente	Notes
<input checked="" type="checkbox"/> Engineering Mechani	Task	0		Assign	0	-	-	
<input checked="" type="checkbox"/> Misc. Cost	Task	0		Assign	0	-	-	
<input checked="" type="checkbox"/> D-FMEA Enginee	Task	0		Assign	0	-	-	
<input checked="" type="checkbox"/> P-FMEA Support	Task	0		Assign	0	-	-	
<input checked="" type="checkbox"/> D-Reviews Engi	Task	0		Assign	0	-	-	
<input checked="" type="checkbox"/> D-Reviews Moul	Task	0		Assign	0	-	-	
<input checked="" type="checkbox"/> D-Reviews Star	Task	0		Assign	0	-	-	
<input checked="" type="checkbox"/> D-Reviews Mant	Task	0		Assign	0	-	-	
<input checked="" type="checkbox"/> D-Reviews Supp	Task	0		Assign	0	-	-	
<input checked="" type="checkbox"/> D-Reviews Cust	Task	0		Assign	0	-	-	

Version	1	Date:	18-April-2016
Status	Template		85

Step 3 In order to define efforts and costs, select icon Edit and enter values



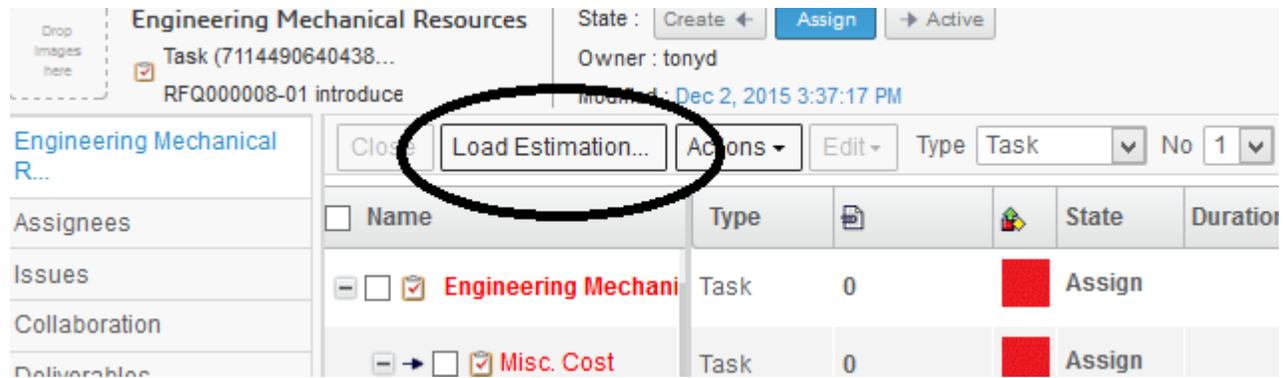
Press Save to save values entered; Edit session can be repeated several times.

Users have to enter values for leaf tasks (tasks without sub-tasks); the system will retrieve the sum for all summary tasks (tasks composed by sub-tasks).

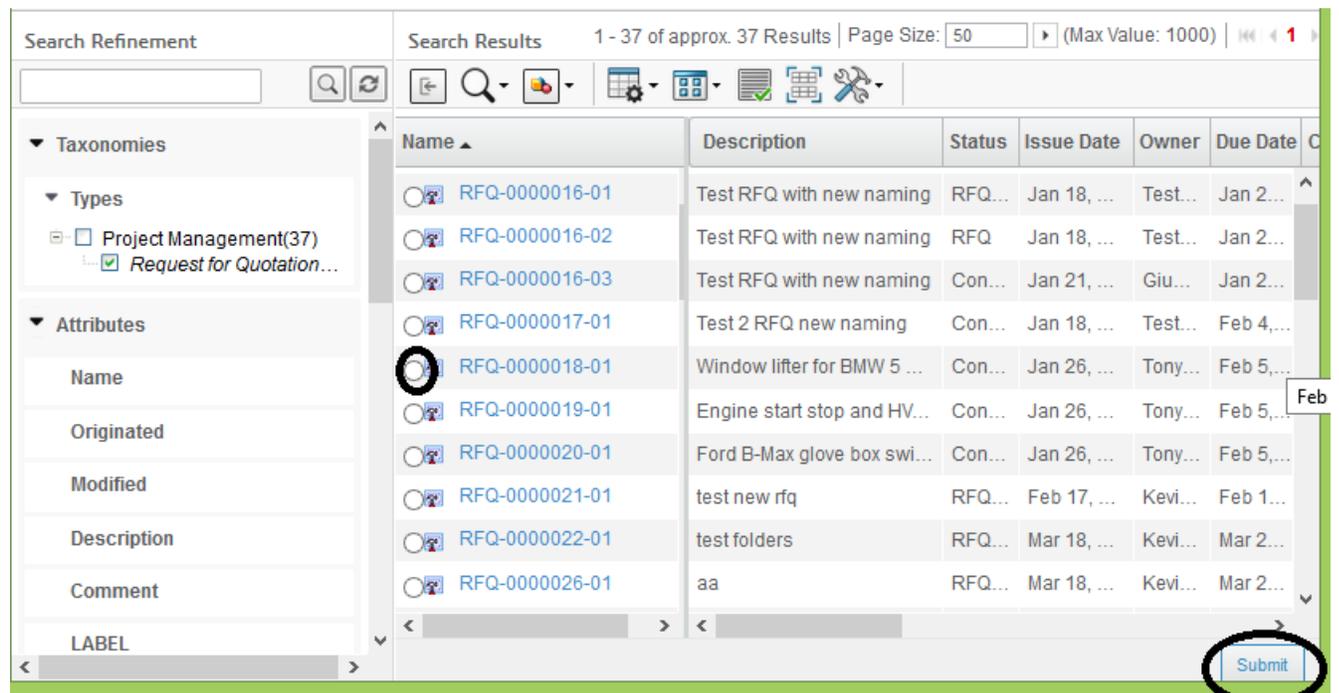
Name	Type	State	Duration/Effort (Hour)	Cost
Lab Testing and Equipmen	Task	Assign	56	
Misc. Cost MTL	Task	Assign	0	100 euro
Lab Testing and Deve	Task	Assign	56	
D-FMEA support	Task	Assign	12	
Analysis	Task	Assign	24	
D-Reviews Engineeri	Task	Assign	8	

Version	1	Date:	18-April-2016
Status	Template		86

Step 4 Using command Load Estimation From Project, user can enter Duration/Effort values copying the value from another RFQ. User has to select command from toolbar



A new window is opened with all RFQs; the user has to select a RFQ and select command Submit.



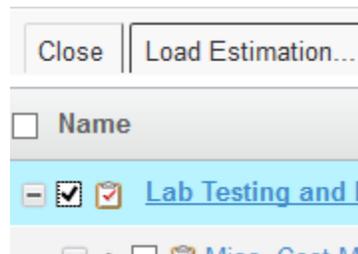
Version	1	Date:	18-April-2016
Status	Template		87

Users have to enter values for leaf tasks (tasks without sub-tasks); the system will retrieve the sum for all summary tasks (tasks composed by sub-tasks).

<input type="checkbox"/> Name	Type			State	Duration/Effort (Hour)	Cost
<input type="checkbox"/> <input checked="" type="checkbox"/> Lab Testing and Equipmen	Task	0		Assign	56	
<input type="checkbox"/> <input checked="" type="checkbox"/> Misc. Cost MTL	Task	0		Assign	0	100 euro
<input type="checkbox"/> <input checked="" type="checkbox"/> Lab Testing and Deve	Task	0		Assign	56	
<input type="checkbox"/> <input checked="" type="checkbox"/> D-FMEA support	Task	0		Assign	12	
<input type="checkbox"/> <input checked="" type="checkbox"/> Analysis	Task	0		Assign	24	
<input type="checkbox"/> <input checked="" type="checkbox"/> D-Reviews Engineeri	Task	0		Assign	8	

Step 5 Complete all Quotation tasks assigned to a user with dedicate commands

Select the top task, select command Close; the time spent to complete the command depends on number of tasks to close (vary from some seconds to a couple of minutes)



Version	1	Date:	18-April-2016
Status	Template		88

4.2 RFQ02 Estimated Timing Plan definition

Purpose	Launch Manager provides an estimated timing plan	Status	Define
Stakeholders	Launch Manager		
Beginning	RFQ status is Complete BOM		
Interactions	Users involved are notified by email; each user can see tasks assigned using a Task dashboards or using a dedicated view in RFQ process. Launch Manager can upload timing plan estimation		
End	RFQ estimated timing plans are complete		
Constraints			

Launch Manager can review information provided by managers during estimation (CBOMs, volumes estimated, tooling sets); has to provide one or more documents and information, to describe timing plan proposal for each sales options.

Step 1 Select Project User command, select Tasks tab, select hyperlink related to task name to be completed with timing plan document.

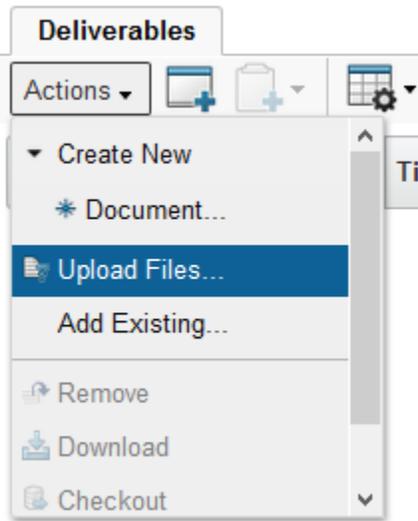
Name	Slip Days	State	% Complete	Project	Est
<input type="checkbox"/> CMS MBOM Change Mng and	42	Active	50	PLM Impl...	Ju
<input type="checkbox"/> Analysis	0	Active	50	PLM Impl...	Me
<input type="checkbox"/> RFQ CBOM EBOM MBOM E	0	Active	50	PLM Impl...	Me
<input type="checkbox"/> Round	0	Active	50	PLM Impl...	Me
<input type="checkbox"/> Live Workshop	0	Active	50	PLM Impl...	Me
<input type="checkbox"/> Use Cases Approval	0	Active	50	PLM Impl...	Me
<input type="checkbox"/> Round	0	Active	50	PLM Impl...	Me
<input type="checkbox"/> Timing Plan	0	Assign		RFQ000004-01	De
<input type="checkbox"/> Installation	0	Active	50	PLM Impl...	Me
<input type="checkbox"/> ProdInstallation	0	Assign		PLM Impl...	Jar
<input type="checkbox"/> Project Management	0	Active	50	PLM Impl...	M-

Step 2 Select icon or dedicated command, to upload deliverables

Name	Type	Id	Dependency
<input type="checkbox"/> Timing Plan	Task		2:FS+0.0 d

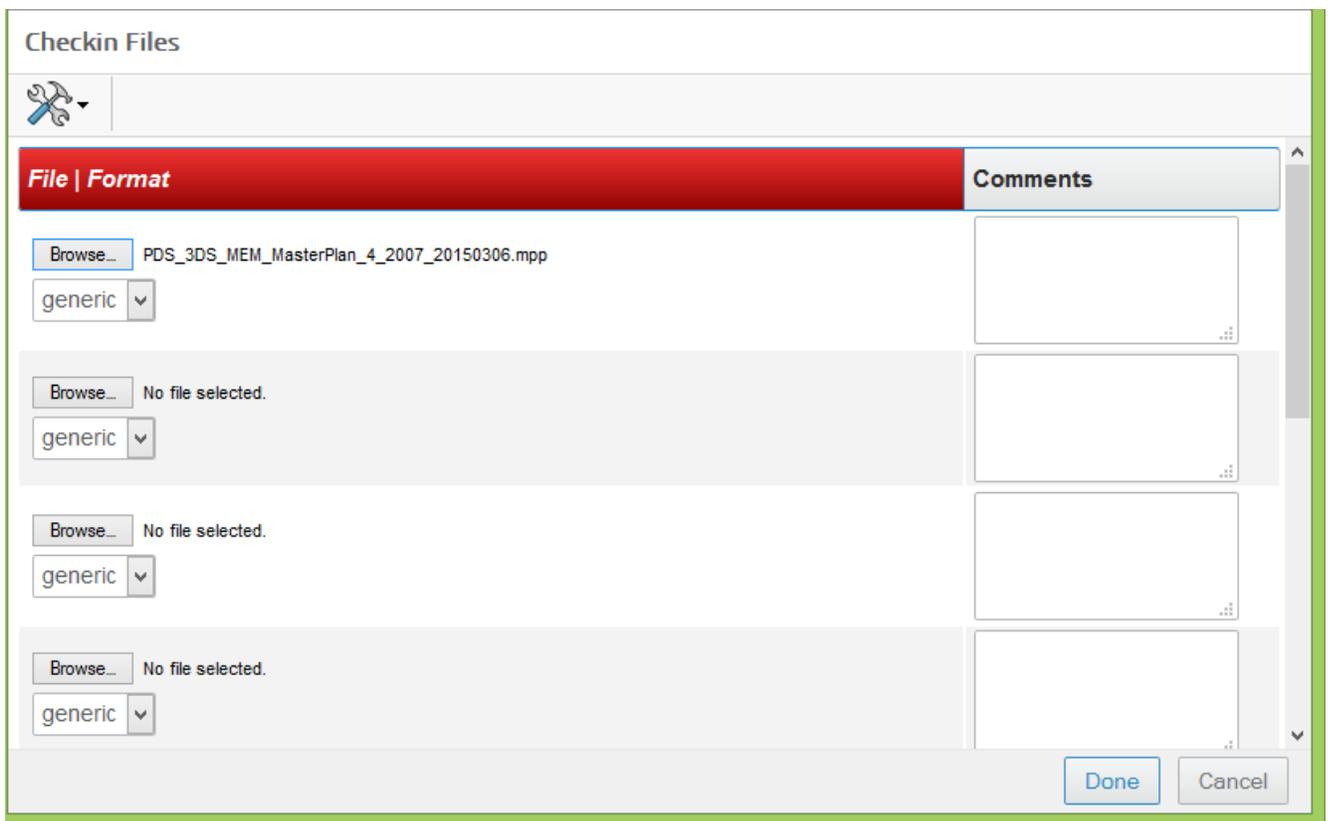
Version	1	Date:	18-April-2016
Status	Template		89

Step 3 From Action menu, select command Create New Document or Upload Files



Upload Files opens a form, where user can select one or more files as deliverables (select command Browse).

Document is created with an autaname function, with empty description and Title



Create New Document function is executed in two steps:

- a) Define name (an autaname function is available), Title and description

Version	1	Date:	18-April-2016
Status	Template		90

Step 1 of 2: Specify Details

 Fields in red italics are required.

Name AutoName

Type ..

Policy ▾

Title

Description

Access Type ▾

Document Type

b) Upload files (select command Browse)

Step 2 of 2: Upload Files

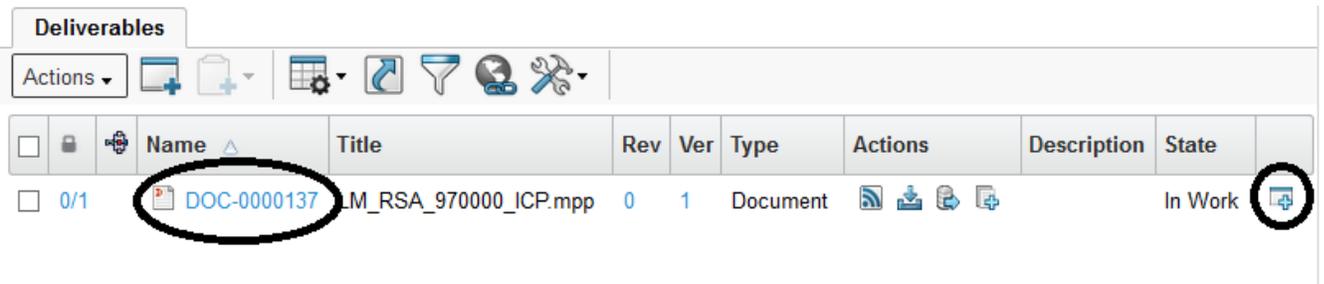


File Format	Comments
<input type="button" value="Browse..."/> No file selected. <input type="text" value="generic"/> ▾	<input type="text"/>
<input type="button" value="Browse..."/> No file selected. <input type="text" value="generic"/> ▾	<input type="text"/>
<input type="button" value="Browse..."/> No file selected. <input type="text" value="generic"/> ▾	<input type="text"/>
<input type="button" value="Browse..."/> No file selected. <input type="text" value="generic"/> ▾	<input type="text"/>

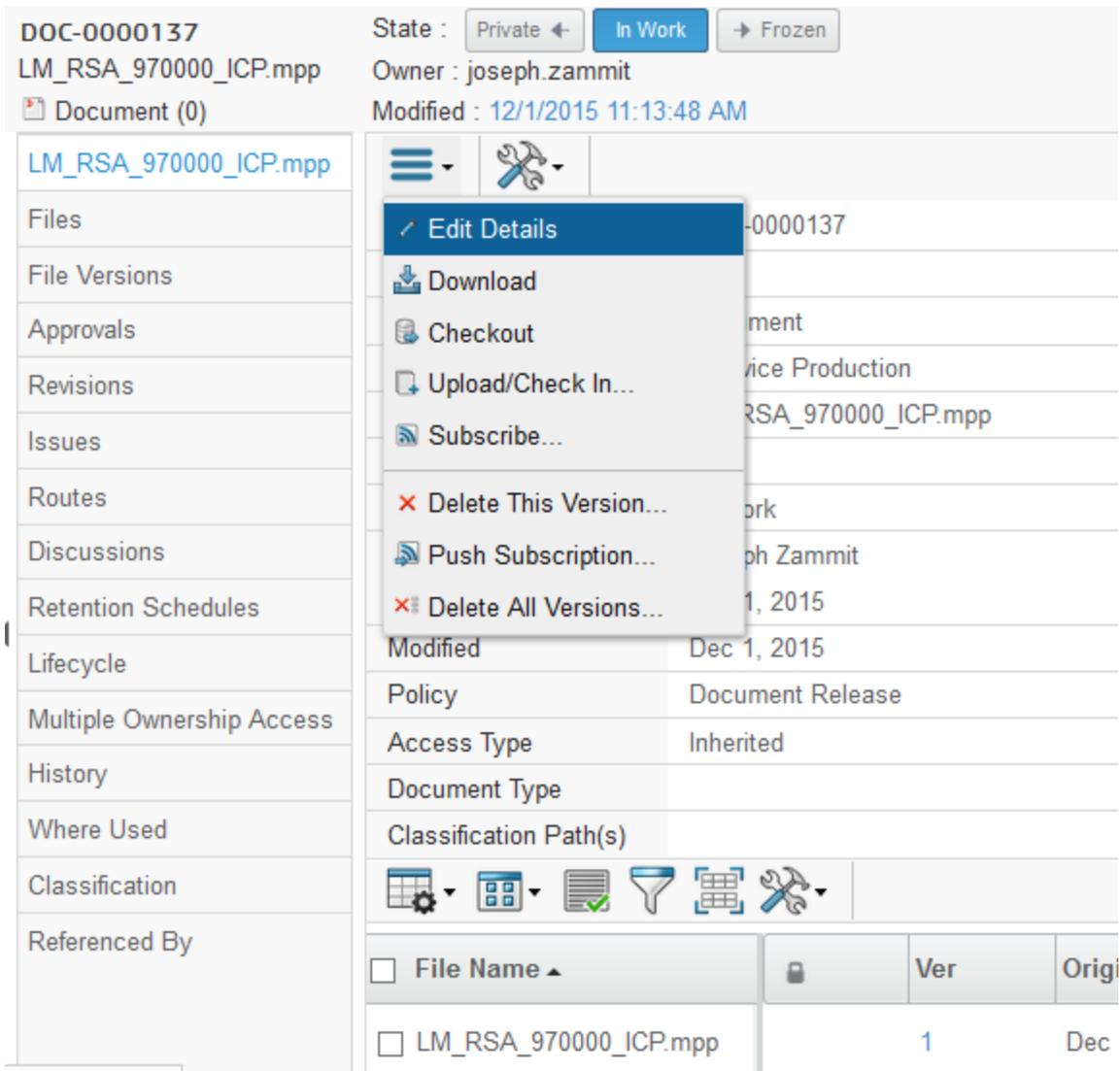
Version	1	Date:	18-April-2016
Status	Template		91

Step 4 Complete or update description

Select hyperlink or icon to popup a new window with document information



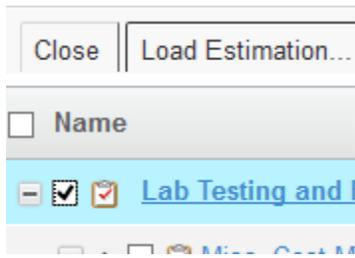
Select commands contained in Action menu in order to update or complete information, upload files.



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Status	Template		92

Step 5 Complete Timing Plan task

Select the task, select command Close.



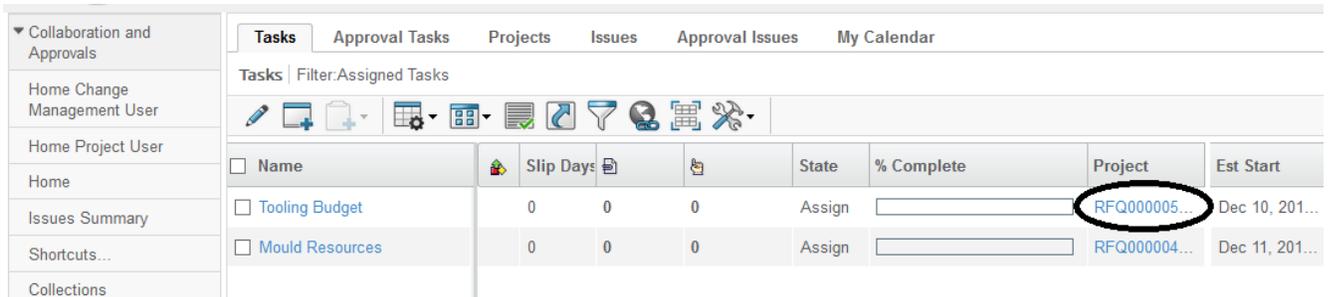
Version	1	Date:	18-April-2016
Status	Template		93

4.3 RFQ03 Tooling Definition

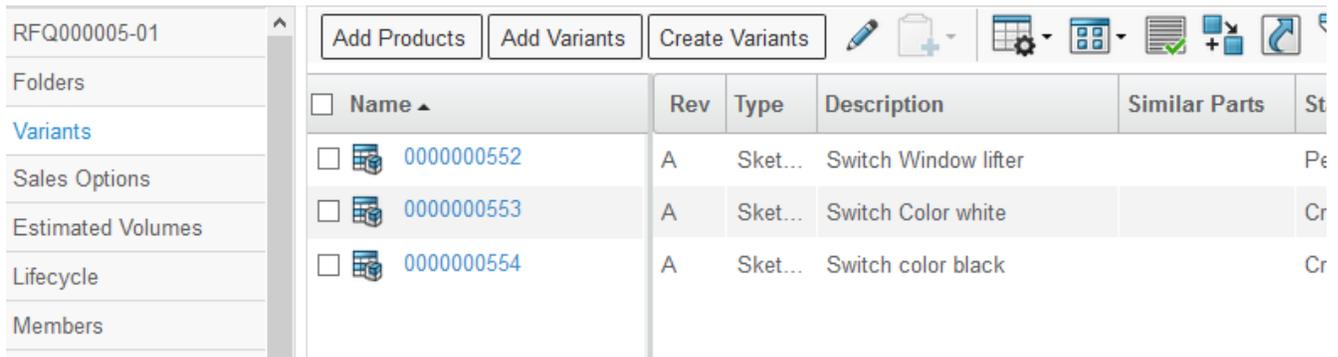
Purpose	Tooling Manager checks and update tooling information and costs	Status	Define
Stakeholders	Tooling Manager		
Beginning	RFQ status is Quoting and Quotation tasks have been completed by users assigned		
Interactions	CBOMs are complete; Tooling Manager provides, for each variant, a proposal about tools used to produce components. Quotation Manager can view tooling cost estimation		
End	RFQ estimates are complete		
Constraints	RFQ estimates and CBOMs are complete with tooling proposal		

Tooling Manager can review information provided by manager during estimation (like CBOMs and volumes estimated); has to define tools used to produce variants and components.

Step 1 Select Project User command, select Tasks tab, select hyperlink related to RFQ package name



Step 2 Select command Variants from RFQ package menu

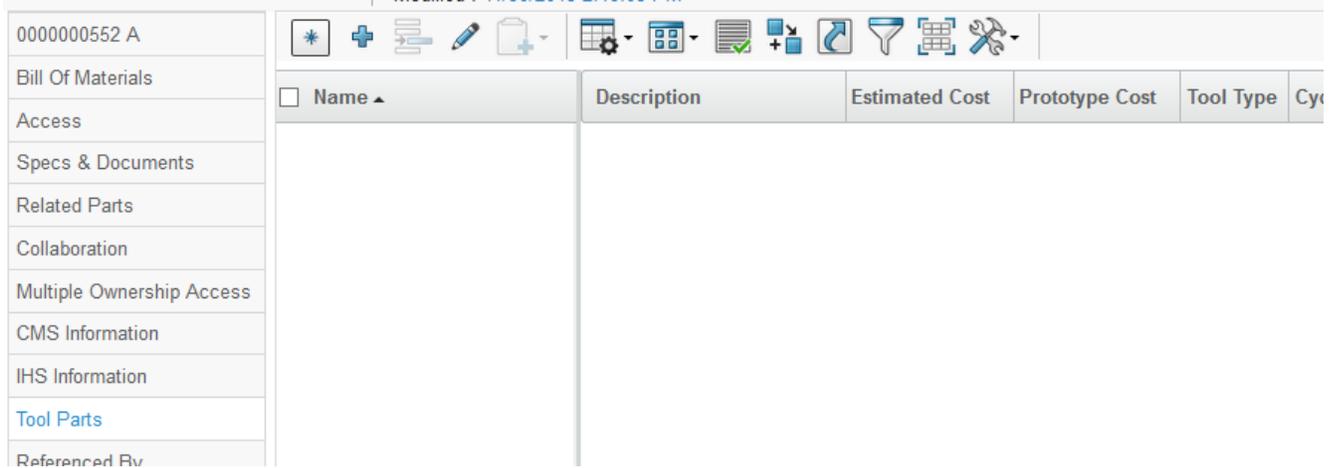


Tooling Manager has to define tools used to produce each variant and each component:

- About variants, repeat step 3 for each variant.
- About components, repeat step 4 for each component.
- In order to update tools information, see step 5

Version	1	Date:	18-April-2016
Status	Template		94

Step 3 (Variants definition) Select one variant; select command Tools Part



Toolbar contains commands to create new tools, add existing tools, disconnect tools from part definition and a command to update tool information



Create new tool: user has to select how many tools have to be created.

The 'Create Tool Part' dialog box is shown with the following fields and options:

- Title: 0000000552 | Create Tool Part
- Fields in red italics are required.
- Type** (required): Tool Parts
- Policy** (required): Generic
- AutoName Series** (required): Tool Part Number
- Number of Parts**: 1
- Buttons: Done, Cancel



Add Existing Tools: user has to select tool serial number and press Submit

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Status	Template		95

Add Existing

<input type="checkbox"/>		10011					
<input type="checkbox"/>		10012					
<input type="checkbox"/>		148000	additional handling frames (rfq3374-20)	Assembly Line	n/a	Audi/Method	n/a
<input type="checkbox"/>		2982	painting jig	Production Tools	n/a	Ford	02982
<input type="checkbox"/>		2983	painting jig	Production Tools	n/a	Ford	02983
	Name ▲	Description	Tool Type	Number of Cavities	Customer Property	Project Code	Remarks
<input type="checkbox"/>		2995	button - 52695	Production Tools	2	Ford	02995
<input type="checkbox"/>		2996	button - 52980 + 81 + 82	Production Tools	3	Ford	02996
<input type="checkbox"/>		3007		Production			

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Disconnect Tools: user has to select tools to be removed from part definition

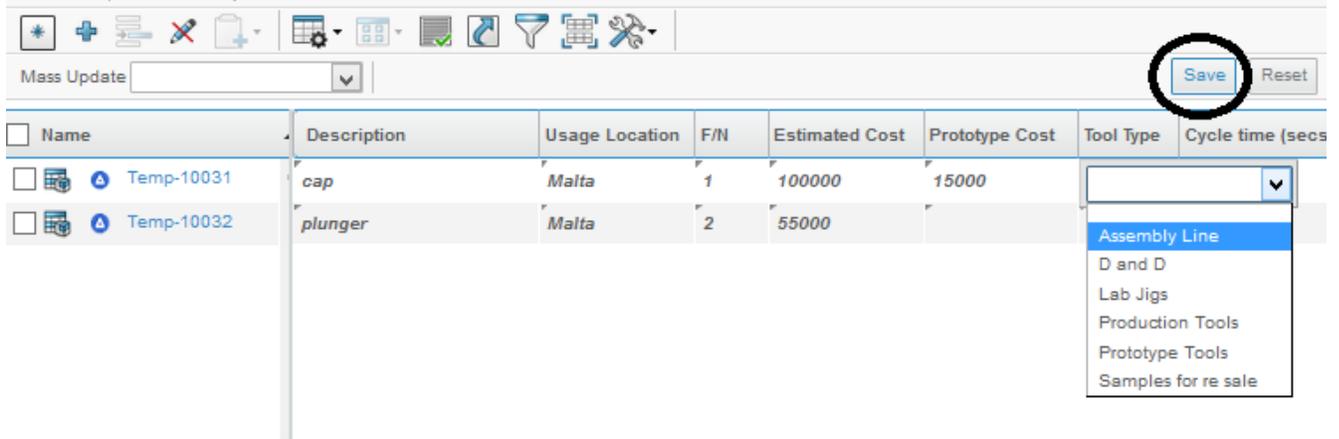
You have chosen to remove the selected items from the list. Removing an item does not delete it from the database. To continue with the removal, click OK. To cancel the removal, click Cancel.

Prevent this page from creating additional dialogs



Edit Details: user can enter or update tool information

Version	1	Date:	18-April-2016
Status	Template		96



Step 4 (Components definition) Select command Summary Matrix Components

Table contains all components defined for all variants

Name	Description	Switch Window lift	Switch Color white	Switch color black
0000000555	Index	X	X	X
0000000556	Button	X	X	X
0000000557	PCB	X	X	X
0000000558	Spring	X	X	X
B52106-05	HOUSING			X
B52106-06	HOUSING			X

Select hyperlink for a component; select command Tool Parts and repeat task described for variants

Name	Description	Estimated Cost	Prototype Cost
3370	housing	15000	

Repeat this task for each component

Step 5 (Tools definition) Select command Tooling Cost Breakdown from RFQ package menu

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Status	Template		97

Table contains all tools, defined using previous commands, contained in all variants and components. Select icon Edit in order to enter or update tools information

Name	Description	Usage Location	Parts Connected	F/N	Estimated Cost	Prototype Cost	Tool Type	Cycle time (sec)
3370	HOUSING - 800050	Malta	57039-02, 000...					
Temp-10031	cap	Malta	00000394		100000	15000	Assemb...	
Temp-10032	plunger	Malta	00000394		5000		Assemb...	

In order to upload additional document and close the task, see chapter “Estimated Timing Plan definition” and “Task Completion”.

New tools are created using a temporary name; Quoting Manager has the function to update tools information defined by Tooling Engineer and assign a definitive Tool Serial Number (see document related to RFQ process).

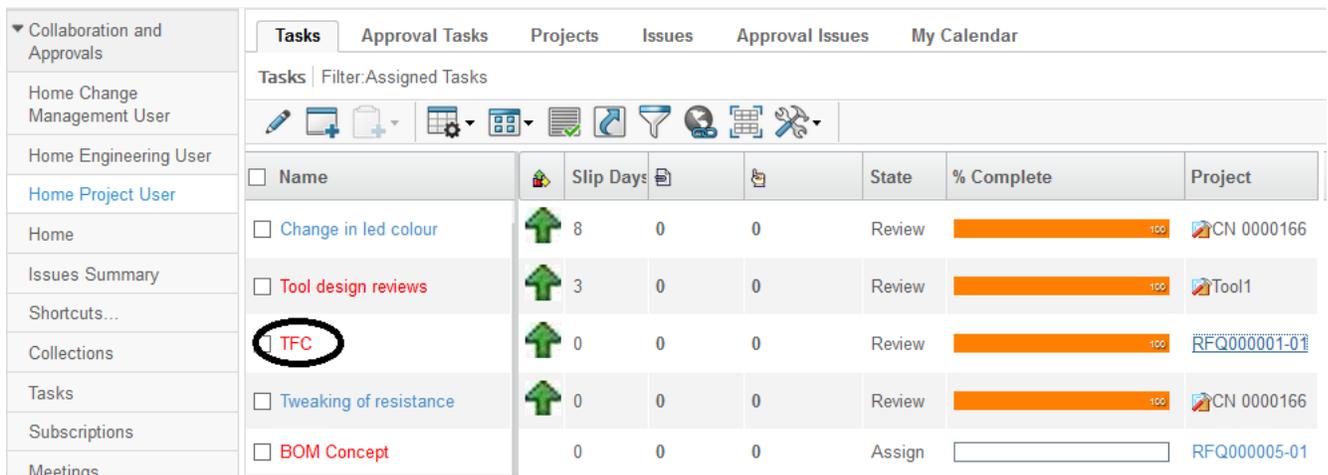
Version	1	Date:	18-April-2016
Status	Template		98

4.4 RFQ04 TFC and Modularity checklist

Purpose	Engineering Managers involved in RFQ have to compile checklists	Status	Define
Stakeholders	Engineering Managers with Quotation tasks assigned		
Beginning	RFQ status is Concept BOM and Quotation tasks have been completed by users assigned		
Interactions	Users have to compile checklist items		
End	RFQ estimates are complete		
Constraints			

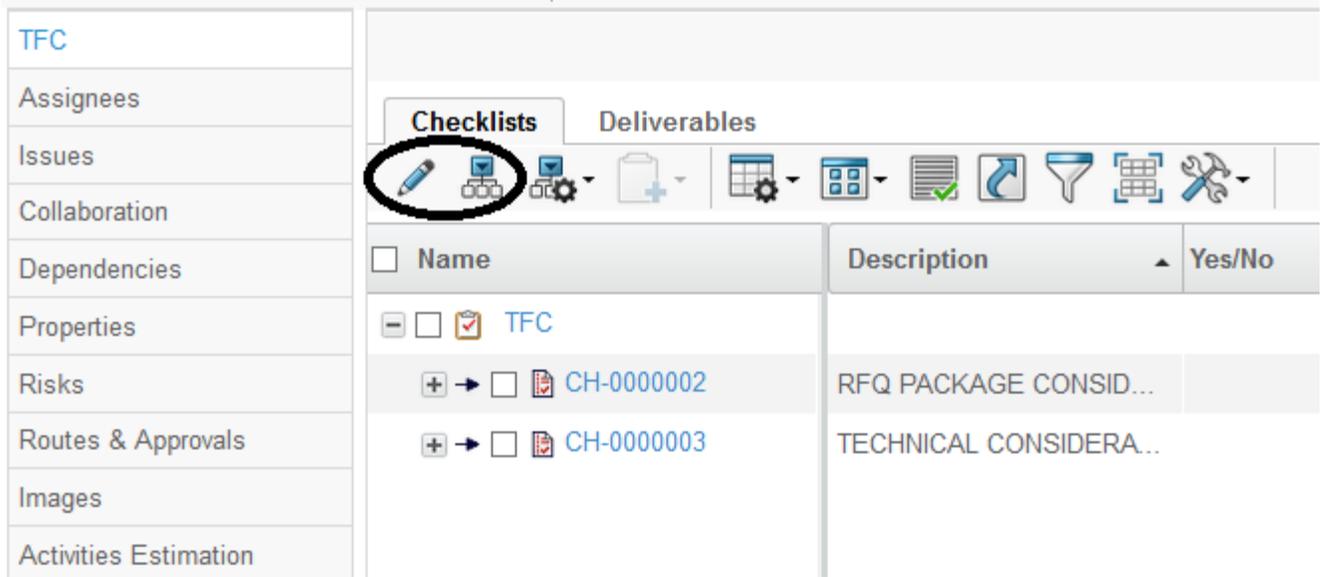
Engineering Manager can review information provided by manager during estimation (like CBOMs and volumes estimated); has to complete checklists used to evaluate technical feasibility and modularity parameters.

Step 1 Select Project User command, select Tasks tab, select hyperlink related to TFC or Modularity checklists



Name	Slip Days	State	% Complete	Project
<input type="checkbox"/> Change in led colour	8	Review	100	CN 0000166
<input type="checkbox"/> Tool design reviews	3	Review	100	Tool1
<input type="checkbox"/> TFC	0	Review	100	RFQ000001-01
<input type="checkbox"/> Tweaking of resistance	0	Review	100	CN 0000166
<input type="checkbox"/> BOM Concept	0	Assign		RFQ000005-01

Step 2 User has to expand all checklist items and select icon Edit



Name	Description	Yes/No
<input checked="" type="checkbox"/> TFC		
<input type="checkbox"/> CH-0000002	RFQ PACKAGE CONSID...	
<input type="checkbox"/> CH-0000003	TECHNICAL CONSIDERA...	

Version	1	Date:	18-April-2016
Status	Template		99

Step 3 Complete checklist items values

User has to enter values to complete all checklist items; before close the task, the system checks if all “Yes/No” and “Response” fields are completed.

The screenshot displays a software interface with a sidebar on the left containing various menu items like 'Assignees', 'Issues', and 'Collaboration'. The main area shows a 'Checklists' tab with a toolbar and a table. The table has the following columns: Name, Description, Yes/No, Response, Risk Mitigation, Rating Justification, and Complete. A dropdown menu is open over the 'Response' column, showing a list of values from 1 to 5. The table contains several rows of checklist items, some with 'Yes' in the 'Yes/No' column and numerical values in the 'Response' column. The 'Response' column for the last row shows a value of 4.

Name	Description	Yes/No	Response	Risk Mitigation	Rating Justification	Complete
TFC	RFQ PACKAGE CONSID...					
	Are the drawings and asso...	Yes	5	5		
	Are the resources availabl...	Yes	5	5		
	Have program milestones ...	Yes	5	5		
	Is product adequately defi...	Yes	5	5		
	TECHNICAL CONSIDERA...					
	Business Processes And ...					
	Are any specific concessi...	Yes	5	5		
	Are specified field and/or p...	Yes	4	4		

Version	1	Date:	18-April-2016
Status	Template		100

4.5 RFQ05 Task Completion

Purpose	Users involved in RFQ have to provide an estimation	Status	Define
Stakeholders	Manager with Quotation tasks assigned		
Beginning	RFQ in status Quoting		
Interactions	Users can close the estimation tasks.		
End	Quotation tasks have the status Complete and an Estimated Duration completed.		
Constraints			

Step 1 Select Project User command, select Tasks tab, select hyperlink related to task name

The screenshot shows a software interface with a sidebar on the left and a main task list on the right. The sidebar includes options like 'Collaboration and Approvals', 'Home Change Management User', 'Home Engineering User', 'Home Project User', 'Home', 'Issues Summary', 'Shortcuts...', 'Collections', 'Tasks', 'Subscriptions', 'Meetings', 'My Calendar', 'Decisions', and 'Discussions'. The main area has tabs for 'Tasks', 'Approval Tasks', 'Projects', 'Issues', 'Approval Issues', and 'My Calendar'. The 'Tasks' tab is active, showing a list of tasks with columns for Name, Slip Days, State, % Complete, and Project. The task 'BOM Concept' is highlighted with a red circle.

Name	Slip Days	State	% Complete	Project
Change in led colour	8	Review	100	CN 0000166
Tool design reviews	3	Review	100	Tool1
TFC	0	Review	100	RFQ000001-01
Tweaking of resistance	0	Review	100	CN 0000166
BOM Concept	0	Assign		RFQ000005-01
BOM Concept	0	Review	50	RFQ000004-01
Lab Testing and Equipment	0	Assign		RFQ000004-01
Modification of PCB size/desi	0	Assign		CN 0000166

Step 2 Select the top task, select command Close; the time spent to complete the command depends on number of tasks to close (vary from some seconds to a couple of minutes).

The screenshot shows a detailed view of a task. On the left, there is a sidebar with options like 'BOM Concept', 'Assignees', 'Issues', 'Collaboration', 'Deliverables', and 'Dependencies'. The main area shows a task card for 'BOM Concept' with a 'Close' button circled in red. Below the task card, there is a table with columns for Name, Type, Id, and Dependency. The 'BOM Concept' task is highlighted in blue.

Name	Type	Id	Dependency
BOM Concept	Task		

Version	1	Date:	18-April-2016
Status	Template		101