







Project Users Use Cases

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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 con assign tasks to project members, in order to complete task activities.

To complete the task, the project member has to set the percentage <u>% Complete</u> 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

 Collaboration and Approvals 	PowerView	PowerView										
Home	Tasks Issues Approval Tasks Approval Issues Projects My Calendar Messages											
Home RFQ User	Tasks Filter.Assigned Tasks											
Home Engineering User	/ 📮 斗 🗔 - 🖽											
Home Change	Name	۵	Slip Days	s 🖻	8	State	% Complete	Project	Est Start	Estimated Finish Date 🔺	Act Finis	
Management User	BOM Concept		88	0	0	Assign		RFQ000009-01	Dec 16, 2015	Dec 16, 2015		
Issues Summary	Engineering Mechanical Res		88	0	0	Assign		RFQ000009-01	Dec 16, 2015	Dec 16, 2015		
Collections	Modification of PCB size/des		86	1 🖻	0	Active	20	CN 0000166	Dec 18, 2015	Dec 18, 2015		
Subscriptions	PLS PHASE 4 - Production L		83	0	0	Active		P1	Oct 15, 2015	Dec 23, 2015		
▼ Team									0.100.0045			
Workspaces	PFMEA+ QCP for each tool a		69	0	0	Active	20	Tool1	Oct 23, 2015	Jan 12, 2016		
	Engineering Mechanical Res		60	0	0	Assign		RFQ-0000016-03	Jan 25, 2016	Jan 25, 2016		
	BOM Concept		60	0	0	Assign		RFQ-0000016-03	Jan 19, 2016	Jan 25, 2016		
	BOM Concept		56	0	0	Assign		RFQ-0000017-01	Jan 25, 2016	Jan 29, 2016		
	Engineering Mechanical Res		56	n	n	Assian	1	RE0-000017-01	lan 29-2016	lan 29-2016		

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

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Tasks Issues Appro	val Ta	sks A	pproval Iss	ues Proje	ects N	Ay Calendar Messages					
Tasks Filter:Assigned Tasks											
🖉 🗔 🛄 🛛 🗔 T 🔢	•	2 🗸	7 🔮 🛛	≣ % -							
Name	۵	Slip Days	Ð	5	State	% Complete	Project	Est S			
BOM Concept		88	0	0	Assign		RFQ000009-01	Dec			
Engineering Mechanical Res		88	0	0	Assign		RFQ000009-01	Dec			
Modification of PCB size/des		86	1 🖺	0	Active	27	CN 0000166	Dec			
PLS PHASE 4 - Production L		83	0	0	Active		P1	Oct 1			
PFMEA + QCP for each tool a		69	0	0	Active	20	Tool1	Oct 2			
Engineering Mechanical Res		60	0	0	Assign		RFQ-0000016-03	Jan :			
BOM Concept		60	0	0	Assign		RFQ-0000016-03	Jan			
BOM Concept		56	0	0	Assign		RFQ-0000017-01	Jan :			
C Engineering Mechanical Res	<	56	n	n	Assian	· · · · · · · · · · · · · · · · · · ·	REO-000017-01	lan (

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, ক = complete

Slip day: delay days

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

 $rac{1}{2}$: 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.

Tasks Is	sues	Арр	oroval '	Tasks	Approval Issue	s Projects	My Calenda	nr Message	es						
	• -] 7	' 😫 🗏 🔆 -										
														Estimated	Actual
Name	E	dit	٨	₽	Reported Against	Classification	Description	Visibility	Domain	Action Taken	Priority	% Complete	Approver	Finish	Start
🗌 🖢 ISS-0000	0174 🖋	>	Ŷ	0	000000010	Issue - A probl	test	Internal	Design		Low	0		Feb 29, 2016	
🗌 🖢 ISS-0000	0180 🖋	,	\diamond	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.

Tasks	Issue	s	Арр	roval Tasks	Approval Issues Projects	My Calendar	Messages						
	** [7 (-		2 🖓 😫 🗮 🔆								
🔄 Name 🔺			♣	Title		Instructions	Due Date	Туре	State	Context	Ø	Workspace	
🗌 🕅 IT-00	00242		E.	. IT-0000242	CA-0000262	kindly approve	Jan 10, 2016	Comment	Assigned	R-00002	1		Ð
🗌 🗊 IT-00	00277		E.	Approval Gate	Gate 1 - Review and Sign off	Check Gate c	Feb 16, 2016	Approve	Assigned	R-00002	1		ē
🗌 🗭 IT-00	00287		F.	Approve PD	Development	Check task c	Feb 17, 2016	Approve	Assigned	R-00002	1		ē

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.

Tasks Issues		Approv	al Tas	ks Approval Iss	ues Projects	My Calenda	r Mess	sages						
Close Reject	Close Reject 📮 📮 🛛 🐺 🛃 🖓 🚱 🧱 🎇 🔆													
													Estimated	Actual
✓ Name	Edi		Ð	Reported Against	Classification	Description	Visibility	Domain 🔺	Action Taken	Priority	% Complete	Approver	Finish	Start
✓ <a>ISS-0000177	ø	Π.	0	Test Export	Issue - A probl	Check design	External	Design	02.15.2016;	Low	100	Matthew Spiteri	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	Approva	al Tasks	Approval Iss	sues Proje	ects I	Ny Calendar	Messages				
Projects	Filter:Active											
Actions -	-	- •	II • 🗾	Pi 🖉 5	7 😪 🗏	**						
Name		٨	Current Ph	ase Ty	уре	Status	Owner	Estimated Finish Date	Act Finish	Created Date -	Program	Description
🕀 🗌 🎽	Test prj compar	ıy		P	roject Space	Create	Joseph Zammit	Mar 8, 2018		Feb 25, 2016		Test prj company
÷ 🗌 🎓	CO-0018751		Administrat	ive and P	roject Space	Assign	Joseph Zammit	May 31, 2016		Feb 23, 2016	CN FORD 2016	test
± 🗌 🎽	Test Export	5	PLS PHASE	E 1 - Pr Pi	Project Space	Active	Joseph Zammit	Feb 18, 2016		Feb 11, 2016		Test Export

1.6 My Calendar

PowerView

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

1-Jun-2015 - 30-Jun-2015							
Sunday							
Junuay	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Order 🔺
				1	1	1	0
7	8	9	10	11	12	13	1
							2
14	15	16	17	18	19	20	3
							4
21	22	23	24	25	26	27	5
							6
28	29	30	1 Jul	2	3	4	7
			🔁 Engineer				
			Manufact Engineer				8
			🔁 Lab Test				
			8More Objects				
5	6	7	8	9	10	11	9
		Project📀					
							10
	7 14 21 28 5	7 8 14 15 21 22 28 29 5 6 6	7 8 9 14 15 15 21 22 23 28 29 30 5 6 7 6 7 9 9	7 8 9 10 14 15 16 17 21 22 23 24 28 29 30 1 Jul 28 29 30 1 Jul 5 6 7 8 6 7 8	7 8 9 10 11 14 15 16 17 18 21 22 23 24 25 28 29 30 1.1ul 2 28 29 30 1.1ul 2 5 6 7 8 9 6 7 8 9	7 8 9 10 11 12 14 15 16 17 18 19 21 22 23 24 25 26 28 29 30 1Jul 2 3 28 29 30 1Jul 2 3 5 6 7 8 9 10 5 6 7 8 9 10	7 8 9 10 11 12 13 14 15 16 17 18 19 20 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 1,Jul 2 3 4 10 Lab Test. BMore Objects 20 3 4 5 6 7 8 9 10 11

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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	lss	ues Approval Tasks Approval Issues Projects	My Calendar	Messages		
Message	s					
Create M	essad	Check Mail Delete Selected				
	, occurrent of the second seco					Subject *
		Subject		D	From	Received V
		Task Approval Notice			User Agent	Mar 23, 2016
		Route Completion Notice		D	User Agent	Mar 23, 2016
		Change Request approved		D	UserAgent	Mar 23, 2016
		The new Change Order has been assigned.		D	User Agent	Mar 23, 2016
		The new Change Request has been assigned.		D	Matthew Spiteri	Mar 23, 2016
		Change Request Cancelled Notification.			Jessica Camilleri	Mar 23, 2016
		Route Completion Notice		D	User Agent	Mar 23, 2016
		Task Reassignment Comments		D	Matthew Spiteri	Mar 23, 2016
		Route Completion Notice		D	User Agent	Mar 23, 2016
		The new Change Request has been assigned.		D	Matthew Spiteri	Mar 23, 2016
		The new Change Request has been assigned.		D	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 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 Issues A	pproval Ta	sks A	Approval Iss	ues Proje	ects I	Ny Calendar	Messages		
Tasks Filter:Assigned Task	(S								
🖉 🗔 🔂 - 🔂 -) 🕗 🌷	7 🔮 🛛	≣ % -					
Name	۵	Slip Days	Ð	6	State	% Complete		Project	Est Start I
BOM Concept		88	0	0	Assign			RFQ000009-01	Dec 16, 2015
Engineering Mechanical	Res	88	0	0	Assign			RFQ000009-01	Dec 16, 2015
Modification of PCB size/	des	86	1 🖭	0	Active	20		CN 0000166	Dec 18, 2015
PLS PHASE 4 - Productio	n L	83	0	0	Active			P1	Oct 15, 2015
PFMEA + QCP for each to	ol a	69	0	0	Active			Tool1	Oct 23, 2015
Engineering Mechanical	Res	60	0	0	Assign			RFQ-0000016-03	Jan 25, 2016
BOM Concept		60	0	0	Assign			RFQ-0000016-03	Jan 19, 2016
BOM Concept		56	0	0	Assign			RFQ-0000017-01	Jan 25, 2016
Engineering Mechanical	Res	56	n	n	Assian	[REQ-000017-01	lan 29-2016

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1.8.1 Tasks Details

Drop Images here PFMEA + QCP for Task (52144550 Tool1 Tool1	or each tool and 121092	State : As Owner : Te Modified : A	State : Assign + Active > Review Owner : Test Everything Modified : Apr 18, 2016 11:39:48 AM						
PFMEA + QCP for each too	Actions - Edit -	Type Tas	k 🗸 M	Vo [1	I v 🖷 🛗	💿 🥒 🛃	a 🎝 - 🛄 -	.	
Assignees						Estimated	I	1	
Issues	Name		Туре	ld .	Dependency	Duration	Start Date	End Date	Ð
Collaboration	PFMEA+	QCP for eac	Task		2:SS+0.0 d	60.0 Days	Oct 23, 2015	Jan 12, 2016	0
Deliverables									
Dependencies									
Properties									
Routes & Approvals									

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

1.8.2 Categories menu

Development and Go Live	Name of the task: breakdown structure of the task (see chapter Edit Task Details)
Assignees	Assignees: Users assigned to the task (see Assigning and Delegating Tasks)
Issues	Assignees. users assigned to the task (see Assigning and Delegating Tasks)
Collaboration	Issues: issues related to the task (see Open Issue Deck)
Deliverables	Collaboration: list of decisions, discussions and meetings related to the task
Dependencies	consorration. list of decisions, discussions and meetings related to the task
Properties	Deliverables: the list of documents or items needed to complete the tasks (see
Routes & Approvals	Working with Deliverables).

Dependencies: allows user to define the dependencies of the task in relation with other tasks (Stat 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 - Edit - Type				•	-		5	7 🗐 🕅	ß.			
Actions - provides severa	al commands related to ta	asks:										
Actions - Edit - Type	Copy schedule: allows u	isers	to copy ar	n exist	ing s	chedule to t	the selected	d task:				
Copy Schedule Deliverables Report Add/Remove Dependency	Copy erCopy paCopy sc	 Copy entire schedule from another project Copy partial schedule from another project Copy schedule from ASCII file 										
 Add Task Task Above 	 Copy schedule from project template Delivery report: shows a delivery report of the selected task 											
Sub Task	Name PLS PHASE 4 - Production Launch	ld ▲ 36	Est. End Date Jun 1, 2016	State Active	% 2.0	Assignee matthew.spiteri						
 Add Project 	Other activities	38	Jun 1, 2016	Assign	0.0	Johann						
Project Above	Compile and submit all ANPQP docu	39	Jun 1, 2016	Assign	0.0	matthew.spiteri						
Sub Project	Add/Remove Depender	ncy: a	allows use	rs to i	nana	ge the inter	nal or exte	rnal				
Mark as Deleted	dependencies of the sel	ecteo	l task									
Delete Selected	Add task: allows users t	o cre	ate a new	task	abov	e or below t	he selected	t				
Remove Project	Add project: allows use	rs to	add the se	lecte	d tas	k to an abov	/e or sub pi	roject				

Remove/Delete: allows to

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

 Type
 No

 Task
 1

 Image: Second state state in the second state state in the second state state state state in the second state stat



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 <u>% Complete</u> 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.

Tool1 Tool1	Modified :	Apr 18, 2016 11:3	9:48 AM		_				
PFMEA + QCP for each	Actions - Edit - Type Tas	sk 🔽 No	1 🗸 🚎		o 💓	# #• [- -	••••••••••••••••••••••••••••••••••••••	
Assignees	Mass Update								
Issues						Actual			
Collaboration	Name	۵	State	%	Progress	Duration	Start Date	End Date (
Deliverables	PFMEA + QCP for eac		Active 🗸	20.0		0.0	Apr 18, 2016	r	
Dependencies			Create						
Properties			Assign						
Deutee 9 Anneuvele			Active						
Routes & Approvais			Review						
			Complete						

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

	• Use the		Juliu une changes				
	Drop images here Task (3314447 PI M Implement	33783 Owner : joseph.zammit	Active -> Review				8
(Live workshop Assignees	Add Remove Selected Ase Mass Update	sign as Task 🗶 💽 🗸	• 🎫 📄 🖉 🗮 💸•	•		Save Reset
	Issues	User Name	Email	Company	Assignee Role	% Allocation	
	Deliverables	Zammit, Joseph	Joseph.Zammit@methode-eur.com	METHODE ELECTRONICS	Task Assignee		100.0
	Dependencies						

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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.

				,	
Name	۵	Slip Days	Ð	State	% Complet
Project Kick-Off by custom		0	0	Active	20
Kick-off meeting at custom		0	0	Active	20
Design Freeze		0	0	Assign	
Assembly line location rev		0	0	Assign	

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 Approval Tasks	Pro	jects	Issues	Approval Iss	ues I	/ly Calendar		
Tasks Filter:Assigned Tasks								
🥒 📮 📑 🛛 🖬	•	2 🚺	7 🔮 🛛	≣ 🔆 -				
Name	۵	Slip Days	Ð	5	State	% Complete	Project	Es
Lab Testing and Equipment	5	30	0	0	Assign		RFQ0	De
Supplier Nomination		29	0	0	Assign		Test S	De
Tool manufacturer kick-off	5	3	2 🎦 🎦	0	Assign		Test 1	Ja
Manufacturing Resources	\diamond	0	0	0	Assign		RFQ	Fe
Design Freeze		0	0	0	Assign		Test S	Ap
PLS PHASE 3 - Production D		0	0	0	Assign		Test S	Ju

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

Deliv	manı verat	ufacturer Dies	kick-off 3 	2	AL.)							
•	÷	Name) (Title	Rev	Ver	Туре	Actions	Description	Document Approver Role	Document Type	State	
0/	1 4) T 🖄 d	ool new oc-333468774878	Tool new doc	0	1	Document	a 🛓	Tool new doc	DE Senior Design Engineer	Product Engineering	Private	Ъ
0/	1 4	T 🖹	ool pec-313468774613	Tool spec	0	3	Document	8 🛓	Tool spec updated	TE Senior Tooling Engineer	Quality Engineering	Private	Гф
										I			

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

moun

PFMEA + QCP for each too	Delivera	ibles	6	-		=	() ()				
Assignees	Actions -	_+ _+	- 18								
Issues		Name 🛆	A Title	Rev	Ver	Туре	Actions	Description	Document	Document	State
Collaboration									Approver Role	Type	
Deliverables							No Obje	cts Found			
Dependencies											
Properties											
Routes & Approvals											

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.

(Deliverable	s → ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓	' 😧 %	•		
	•	Name 👌	Title	Rev	Ver	Туре
] 0/1	Tool new doc-173901735874	Tool new doc	0	1	Document
	0/1	Tool spec-153901735452	Tool spec	0	1	Document

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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

De	eliverables	
Acti	ions 🗸 🗖 🗍 🗧	¢.
- (Create New	
-	* Document	L
B ₽ (Upload Files	3
,	Add Existing	h
@	Remove	-6!
₫ (Download	
8	Checkout	
,	Add to Folder	

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)

Step 1 of 2:Specify	Details
*≁	
Fleids in red Italics are required.	
Name	AutoName
Туре	Document
Policy	Document Release
Title	PFMEA Document
Description	PEMEA Document
Access Type	Inherited 🗸
Document Approver Role	✓
Document Type	Product Engineering
	Next Cancel

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About Document Type, follow the allowed value

U 10.1.00.20:0111/3			ŀ
		^	F
Step 1 of 2:Specify	- Customer leavet Descriptions		
60	Customer Input Requirements		ŀ
×.	Customer PPAP		
Fleids in red Italics are required.	Form Team		Ľ
	Functional Safety Management		l
Name	Launch Management		ľ
Type	Manufactoring Records		
	Open Issues Deck		ŀ
Policy	Phase Sign Off		
Title	Product Engineering		
The	Program Budget		
	Program Review		ľ
	Program Timing		
Description	Project Checklists		
	Quality Engineering		
	Quality Planning		ŧ
Access Type	Diek Assessment		
	Risk Assessment		ŀ
Document Approver	Score card		
Rule	Sourcing Decisions	۷	
Document Type	Product Engineering	¥	

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

Step 2 of 2: Upload Files					
≫					
File Format					
Sfoglia GL codes explanation.pptx					

Version	1	Date:	18-April-2016	
Status	Template			17

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

Component manufacturer k Assignees	Delive Actions	• 📮 📑 • 🛃 •	₸ 🙆 🔆 -	
Issues		👻 Mame 🛆	Title	Rev Ve
Collaboration	0/1	DOC-0000199	DOC-0000199	0 1
Deliverables				
Dependencies				
Properties				
Routes & Approvals				

After document creation, the deliverable table is updated

Act	Deliverables Actions -										
✓	8	여름다	Name 🛆	Title	Rev	Ver	Туре	Actions	Description	State	
7	0/1		PDC-0000031	Line Tooling	0	1	Document	3 ≟ ₿ ₽		In Work	ą

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



1.9.1.2 Upload files

User can select the Upload files command from the Actions menu

Component manufacturer	Deliverables
N	Actions -
Assignees	
Issues	orcale men
Collaboration	Upload Files
Deliverables	Add Existing

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

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

Upload Files To Individual Documents		
File Format	Title	Description
Sfoglia GL codes explanation.pptx	upload file test	test 1

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

Component manufacturer k	Ac	eliver	ables	_ ,-	Q %-					
Issues		8	-	Name 🛆	Title	Rev	Ver	Туре	Actions	Description
Collaboration		0/1		DOC-0000199	DOC-0000199	0	1	Document	N 🕹 🗞 🖡	
Deliverables		0/1		DOC-0000200	upload file test	0	1	Document		test 1
Dependencies										
Properties										
Routes & Approvals										

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

earch Refinement		Search Re	esults 1 - 50 of a	pprox. 4251	1 Result	s Page S	Size: 50) (Max Value: 1000)
Q	Ø	EQ	- 🛋 - 🗸	-	-		E %	-
 Taxonomies 	^	🗌 Name 🗚		Revision	Туре	Title	Û	Description
▼ Types		+ 🗆 👪	00-9496-517.849	00	Vend			
Product Line(9)		•	00-9496-517.850	00	Vend			
Classification(66)		• 🗆 👪	000000001	A	Part			EPB LH
E Ibraries(1)		•	000000002	02	Part			EPB RH
□ Part(23875)		•	000000002	A	Part			EPB RH
The Manufacturing Part(74		• 🗆 👪	000000002	01	Part			EPB RH
Libraries		• 🗆 👪	000000003	01	Part			Roof Switch
		• 🗆 👪	000000003	A	Part			Roof Switch
Attributes		+ 🗆 👪	000000003	02	Part			Roof Switch
Name		<	•••••••	ĉ				
Originated	~							Submit Close

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

	Search Kennensont	Search Results	51 -	77 of app	rox. 77 Re	esults	Page Size: 50) (Max	Value: 100	0) 144 🖣	1 2 🕨 🔤
$\left(\right)$	customer*	E Q. 🚳 🕫 🗸	- Q -	•	R +		*-			
	▼ Taxonomies	□ Name ▲	Revisior	Туре	Title	Ø	Description	State	Owner	Snippets
			0	Doc	test 2	U		In W	Stan	
	▼ Types ⊕ □ DOCUMENTS(77)	🕀 🗖 📔 DOC-0000175	0	Doc	MEM	0		In W	Test	Custo
	a secondaria da contra da contr	∓ □ ▶ DOC-0000196	0	Doc	PLM	Ŵ		In W	Kevi	Custo
	 Attributes 		•			U				
										Custo
	Name	🛨 🗖 DOC-0000206	0	Doc	Cust	0	Customer Requirements	In W	Kevi	ELEC
	Originated									Curta
			0	Dee	Curt	.0	Customer Obserdanda	1-10/	Kani	Custo
	Modified		0	D0C	Cust	U	Customer Standards	In W	Kevi	ELEC
	Description									Custo
	Checkin Reason	🛨 🔲 Old Customer Spec	0	Doc	Cust	U	Customer Specification	In W	Kevi	17-05
		< >	<							>
	Comment								Submit	Close

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

Select the document to be added and click Submit command

Search Refinement	Search Results	51 -	77 of app	orox. 77 F	Results	Page Size: 50 (Max	« Value: 100	0) 144 •	1 2 ▶ ₩
customer*	🔄 🔍 - 🗟 - 🖁	-	-	+] ☆ -			
 Taxonomies 	Name 🔺	Revision	Туре	Title	0	Description	State	Owner	Snippets
		0	Doc	test 2	U		In W	Stan	
 Types DOCUMENTS(77) 		0	Doc	MEM	0		In W	Test	Custo
	+ □ P DOC-0000196	0	Doc	PLM	0		In W…	Kevi	Custo
 Attributes 									Custo
Name	🛨 🗋 🞦 DOC-0000206	0	Doc	Cust	Ø	Customer Requirements	In W	Kevi	ELEC
Originated									Custo
Modified	+ ✔ ♪ DOC-0000207	0	Doc	Cust	Û	Customer Standards	In W	Kevi	ELEC
Description		222							Custo
Checkin Reason	Old Customer Spec	0	Doc	Cust	Ø	Customer Specification	In W	Kevi	17-05
Comment	< >	<					(Submit	Close

The document will be added to the selected task as deliverable

PFMEA + QCP for each too Assignees	D	Deliverables Actions - 📮 寻 · 🖉 🏹 🔮 🔆 -											
Issues Collaboration		•	•	Name 🛆	Title	Rev	Ver	Туре	Actions	Description	Document Approver	Document Type	State
Deliverables Dependencies		0/1	(DOC-0000207	Customer Standards	0	1	Document	a 4 6 6	Customer Standards	Role	Customer Input Requirements	In Work
Properties Routes & Approvals		0/1		DOC-0000212	PFMEA Document	0	1	Document	⊼ ≟ ₿ ₿	PFMEA Document		Product Engineering	ln 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.

Component manufacturer		Deliver	ables							
Assignees	Ac	tions 🗸		🔍 - 🔁 🔁 🖓	🗟 🔆 -					
Issues		8	-	Name 🛆	Title	Rev	Ver	Туре	Actions	Description
Collaboration		0/1		DOC-0000199	DOC-0000199	0	1	Document		
Deliverables		0/1		DOC-0000200	upload file test	0	1	Document		test 1
Dependencies										
Properties										
Routes & Approvals										
Actions		1								
a 🛓 🖨 🖻										

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.

D	Deliverables								
Acti	Actions - 🗔 📄 - 🖉 🖓 🔕 🔆 -								
	8	•	Name 🛆	Title	Rev	Ver	Туре	Actions	Description
	0/1	•	Tool new doc-333468774878	Tool new doc	0	1	Document		Tool new do
	0/1	•	Tool spec-313468774613	Tool spec	0	3	Document	a 🛓 🖨 🖟	Tool spec updated

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

You have chosen to open:						
K HPCamDrv.log						
which is: LOG file (1,6 KB)						
from: http://10.1.68.28:9090						
What should Firefox do with this file?						
Open with TextPad (default) Y						
Save File						
Do this automatically for files like this from now on.						
OK Cancel						

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



<u>Step 2</u> the user has update the file, and save it on the file system

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

Update Files	
Current File Updated File Format	Comments
HPCamDrv.log BrowseNo file selected. generic	New version
	Done Cancel

<u>Step 4</u> 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

D	elive	rable	es l						
Acti	ons .	-	🛄 - 📑 - 🖉 🖓 🔮 🖇	£.					
	8	•	Name 🛆	Title	Rev	Ver	Туре	Actions	D
	0/1	•	Tool new doc-333468774878	Tool new doc	0	2	Document	N 🛓 🔂 🖟	T
	0/1	•	Tool spec-313468774613	Tool spec	0	3	Document	a 🛓 🖨 🕼	T U
			Rev Ver Type	Rev Ver	Тур				
					_				
			0 1 Doci	0 2	Do				
Bef	ore		After		-				

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.

😻 ENOVIA - Mozilla Firefox	
cad-srv-apdev.metho	de-emea.local:9090/3dspace/components/emxSubscription
Tool new doc-1739	01735874 : Subscription Options
**	
Subscription Events	Content Added Content Modified Content Deleted Content Checkout Document Deleted Document Modified Document Revised Route Started New Discussion
	Done Cancel

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

To subscribe a document the user

Step 1 Select the document

<u>Step 2</u> 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.

Component manufacturer k	Deliverables					
Assignees	Ac	tions 🗸		🛄 - 🗳 - 🖉 💆 (2 🔆 -	
Issues		8	* 6 9	Name 🛆	Title	
Collaboration		0/1		DOC-0000199	DOC-0000199	
Deliverables		0/1	(DOC-0000200	upload file test	
Dependencies						
Properties						
Routes & Approvals						

A new window opens with the document details.

	DOC-0000200 test 1 upload file test Document (0) upload file test	State : Private ← In V Owner : joseph.zammit Modified : Apr 18, 2016 1:4	Vork → Frozen
	Files	Name	DOC-0000200
	File Versions	Revision	0
	Revisions	Туре	Document
	Issues	Vault	eService Production
	Routes	Title	upload file test
		Description	test 1
t	Lifecycle	State	In Work
	Multiple Ownership	Owner	Joseph Zammit
	Access	Originated	Mar 15, 2016
	History	Modified	Apr 18, 2016
	Where Used	Policy	Document Release
	Classification	Access Type	Inherited
	Referenced By	Document Type	
		Classification Path(s)	

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.

	RIENCE ENOVIA Collabo	ration and Approvals
V.A		
DOC-0000200 test 1 upload file test Document (0)	State : Private In We Owner : joseph.zammit Medified : Mar 15, 2016 5:	ork → Frozen :54:31 PM
upload file test	≡ •) ‰•	
Files	 Edit Details 	-0000200
File Versions	🛓 Download	
Approvals	🗟 Checkout	iment
Revisions	📮 Upload/Check In	vice Production
Issues	Revise	id file test
Routes	🚯 Revise With Files	ark
Discussions	Subscribe	oh Zammit
Retention Schedules	× Delete This Version	5, 2016
Lifecycle	Push Subscription	15, 2016
Multiple Ownership Access	× Delete All Versions	iment Release
History	Document Approver Role	
Where Used	Access Type	Inherited

1.9.5.1 Edit Details

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

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

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.

DOC-0000212 : Push Subscription						
\$A.						
Subscription Events	Push Subscription Recipients	Subscription Recipients				
Content Added		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				
		Clos	e			

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		
😔 🖶 💷 🖓 🖼 💸	-	
□ Name △	Email Address	
,	No Objects Found	
✓ Page 1 v of 1 ▶ ■ □		Close

Enter the search criteria, select command Search and select person

Search							
& 🔆 -							
Туре	Person						
User Name	ż						
Last Name	ż						
First Name	ż						
Organization	\$						
			_				
Limit to 100 results	Paginate results		Search Cancel				

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

The system updates the list of person involved

DOC-0000212 : Push Subscripti					
Name 🛆	Email Address				
☐ Joseph Zammit	Joseph.Zammit@methode-eur.com				
✓ Page 1 ✓ of 1 → 1	Close				

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

DOC-0000212 : Push Subscription							
×2-							
Subscription Events	Push Subscription Recipients	Subscription Recipients					
ContentAdded	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					
		Close					

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

PFMEA Document	≡ - ‰-								
Files	Name	DOC-(0000212						
File Versions	Revision	0							
Revisions	Туре	Docur	nent						
Issues	Vault	eServi	ce Producti	ion					
Routes	Title	PFME	A Documer	nt					
Lifecycle	Description	PFME	A Documer	nt					
Lilecycle	State	In Wor	k						
Multiple Ownership	Owner	Matthe	w Spiteri						
Access	Originated	Apr 18, 2016							
History	Modified	Apr 18	, 2016						
Where Used	Policy	Docur	nent Relea	se					
Classification	Access Type	Inherit	ed						
Referenced By	Document Type	Produ	ct Engineer	ring					
	Classification Path(s)								
	📑 - 📰 - 🔜 🏹	7 🔳	%≁						
	🗌 File Name 🔺			Ver		Originated	Comments	Originator	Fo
DFMEA_556450-57.xl		ls		2		Apr 18, 20	New version	Matthew S	ge
	TL_226_EN.PDF					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

PFMEA Document	=-	*≁								
Files	/ Edit I	Details	-	0000212						
File Versions	📥 Dow	nload								
Revisions	🗟 Cheo	ckout	1	ment						
Issues	- 🗔 Uplo	ad/Check In	V	ice Producti	on					
Routes	Subs	scribe		A Documen	t +					
Lifecycle	X Dele	te This Version								
Multiple Ownership Access	Pusi	roabooripiion	_	ew Spiteri						
History	× Dele	te All Versions		3, 2016 3. 2016						
Where Used	Policy		Docu	ment Relea	se					
Classification	Access	Туре	Inheri	ted						
Referenced By	Docum Classif	ent Type ication Path(s)	Produ	ıct Engineer	ing					
	Q -	III - 🦷	7 🏾	ჯ∙						
	File N	lame 🔺			Ver	Originated	Comments	Originate		
(EA_556450-57	7.xls		2	Apr 18, 20	New version	Matthew		
	TL_2	26_EN.PDF			1	Apr 18, 20		Matthew		
Version		1			Date			18-Apri	I-2016	
Status		Templat	e							30

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



Delete All Versions

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



The system deletes all the versions of select files.

Glassification Fatt(s)				
🖫 - 📰 - 📃 🏹 🧮	⅔-			
🗌 File Name 🔺	-	Ver	Originated	Comments
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)

	Document (0)	Modifie	d : 1/27	//2016 3:19:02 PM						
	Tool new doc									
(Files File Versions	File Name 🛆 🔒	Ver	Originated	Comments	Originator	Format	File Size	Actions	
	Revisions	HPCamDrv.log	2	Jan 27, 2016 3:19:01 PM	New version	Anabel Cutajar	generic	1.63 KB	۵ 🛓 💧	
	Issues									
	Routes									

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

- Dogamon (o)	incomed to price to the	A
PFMEA Document	≡ • □ • 7 %•	
Files	Upload/Check In	
File Versions	A Developed	-r Origina
Revisions		4
Issues	Checkout	2:16:57
Routes	Delete This Version	
Lifecycle	× Delete All 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)

Document (0)		Modified : 1	/27/2016 3:19:02 PM					
Tool new doc 🐺 🖓 🔆								
Files File Versions	Ver	File Name	Originated	Comments	Owner	Format	File Size	Actions
Revisions	1	HPCamDrv.log	Jan 22, 2016 2:19:34 PM		User Agent	generic	1.63 KB	۰ 🛓
Issues	2	HPCamDrv.log	Jan 27, 2016 3:19:01 PM	New version	Anabel Cutajar	generic	1.63 KB	ے 🜑
Routes								
Discussions								

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-3334687748 Tool new doc Document (1)	78 Tool new doc	State : In Work Owner : anabel Modified : Feb 25, 20	16 12:39:09 PM			< <u></u>
Tool new doc	₽. 🛆 🌾					
Files			T:4 -	Devision	Description	C1-1-
Fil <u>e Versio</u> ns	Name		Title	Revision	Description	State
Revisions	Tool new doc-33	33468774878	Tool new doc	0	Tool new doc	Released
Issues	Tool new doc-33	33468774878	Tool new doc	1	Tool new doc	In Work
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

Document (0)	Modified : 1/27/2016 3:51:10 PM
Tool new doc	Lifecycle
Files	Tool new d <u>or-3334</u> 68774878 rev 0: Lifecycle
File Versions	
Revisions	
Issues	Private In Work Erozon Released Obsolete
Routes	
Discussions	
Retention Schedules	
Lifecycle	

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.

Lifecycle				
Tool new doc-333468774878 rev 0: L	ifecycle			
≡• 🗹 📫 📮 🔆•				
Private	→ In Work	Frozen	→ Released → Obs	olete
Tasks/Signatures Approvals				
🗹 🗔 🗔 🔻 🖓 🙆 🔆 -				
Show: All Approvals 🗸 Approval Status:	All ¥ Filter			
🏠 Name 🛆 Approver	Title	Approval Status	Approval/Due Date	Comments/Instructions
IT-0000274 Alexander Galea	Approve Document	Awaiting Approval	Jan 28, 2016 3:54:28 PM	Approve Document

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

 Collaboration and Approvals 	Tasks Approval Tasks	Projects	Issue	s App	roval Issues My Calen	dar
Home Change	🚽 🖓 👯 📑 📑	₽ .	ľ	S 🛃 🧮	L XS™	
Management User	Name 🔺		A	Title		Instructions
Home Engineering	□ 🖸 IT-0000274			Approv	Tool new doc-33346	Approve Documer
Home Project User					_	
Home Kro User						
Home						

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

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Droo Images here Approve Document ▲ Inbox Task (1)	State : Assigned Owner : alexander Modified : 1/27/201	 → Review 9 6 3.54:28 PM 			<h <=""></h>
Routes	=- 🗔 🚱 🖇	è-			
Revision	Message	<i>v</i>	Owner	anabel	
History	Originated	Jan 27, 2016 3:54:28 PM	Due Date	Jan 28, 2016 3:54:28 PM	
	Allow Delegation	Yes	Assignee	Alexander Galea	
	Routes	🖶 R-0000235	Action	Approve	
	Approval Status	None	State	Assigned	
	Task Requirement	Optional	Instructions	Approve Document	
	Comments		Route Owner Review	No	
	Content	2 %-	Description Tool new doc	State Condition Frozen	Actions

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

Properties		
≡- 📮 🗟 🔆-		
🔒 Change Assignee		
Edit Details		
🗳 Approve		
^{II} ^C Reject	_00	
🚨 Abstain	hai	

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 👻	
Clear	
Assignee Alexander Galea	
Comments	_

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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.

Lifecy	cle					
Tool ne	w doc-33346877	4878 rev 0: Lifecyc	le			
≣ • [- \$ 1 5	↓ ≫·				
		Private	→ In Work ——→	Frozen - 🏎 🛶	Released Of	osolete
Tasks	/Signatures A	pprovals				
	1 🗔 - 💎	🗟 🔆 -				
Show:	All Approvals 💌 Aj	pproval Status: All	 ✓ Filter 			
۵	Name 🛆	Approver	Title	Approval Status	Approval/Due Date	Comments/Instructi
1	🗹 IT-0000274	Alexander Galea	Approve Document	Rejected	Jan 27, 2016 4:08:30 PN	Check content

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 **<u>Routes</u>** 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"

Modified : 1/	/27/2016 3:54:28	PM		
≡ •],• ≣ • ⊞•	🔜 📫 🌄	⊽ 🗏 🔆 -		
	Name 🔺	Description	Route Base Purpose	State
	-@ R-0000235	Approve Document	Standard	Started
Version	1		Date:	
Status	Tem	olate	1	

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.

Lifecycle	⊮ <mark>¤</mark>												
Tool new doc-333468774878 rev 0: Lifecycle													
≡· < 4 1 □ %·													
	^												
Private ──→ In Work ──→ Frozen ── Se → Released ──→ Obsolete													
	~												
Iasks/signatures Approvals	₩.												
Comments/Instructions Action Due Date Completed Date													
Private Jan 27, 2016 3:54: PM	23												
□ In Work Jan 27, 2016 4:12: PM	36												
Frozen Rezent Balea Prove Document approve Document approve Document approved Approve Jan 28, Jan 27, 2016 4:18:	54												
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.

	Drop Innest here Inbox Task (2) Approve Document	State : Revie Owner : alexa Modified : 1/27	Complete nderg /2016 4:18:55 PM								2
(Revision	Name 🛆	Title	Revision	Task Type	State	Approval Status	Comments/Instructions	Due Date	Completed Date	Assignee
	History	AIT-0000274	Approve Document	1	Approve	Complete	Reject	Check content	Jan 28, 2016	Jan 27, 2016	alexanderg
		AIT-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

D Ac	elive tions	rable •	s 	7 😪	*	•							
	8	÷	Name 🛆	Title	Rev	Ver	Туре	Actions	Description	Document Approver Role	Document Type	State	
	0/1	-@	Tool new doc-333468774878	Tool new doc	0	2	Document	2 7	Tool new doc	DE Senior Design Engineer	Product Engineering	Released	>
	0/1	÷	Tool spec-313468774613	Tool spec	0	3	Document	a 7	Tool spec updated	TE Senior Tooling Engineer	Quality Engineering	Private	ф

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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



Actions menu contains the command "Add to Folder"

	Actions -	
1	Create New	
	🖙 Upload Files	
	Add Existing	
	Remove	
	📩 Download	
	Checkout	
(✓ Add to Folder	

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

Select Folders
*.
● 🔏 P-0000110
└O⊠ 02_Phase Sign Off
C 04_Customer Input Requirement
C 06_Program Timing
└── 08_Testing and Validation
C 10_Program Review
C 11_Sourcing Decisions
└─C 09_Quality Planning
C 07_Product Engineering
C 05 Program Budget
03_Open Issues Deck
C 01_Form Team
CN 16 Project Checklists
C 17_Launch Management
└─© 18_Functional Safety Management
C 15_Customer PPAP

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	Mounicu : 1/2//2010 4.40.11 PM							
Test 1 Attilio	Actions - Edit - 🖉 📇 🌉 - 📑 -	-	-	5	7	∖ 😤 🗐		
Collaboration	Namo .			Drop	Drag	Type	Document Type	Document
Details				ыор	Drag	type	Document type	Documenty
Execution	🖃 🔲 者 Test 1 Attilio					Project Space		
Experiments	🖃 🔄 🗁 07_Product Engineering					Workspace F		
Financials	🕀 🔄 🎦 folder07 doc eng ee-213468772373		0/1			Document	Product Engi	EE Senior E
Folders	💽 🔄 🎦 folder07 doc eng-233468772810		0/1			Document	Product Engi	DE Senior [
Objectives	💽 🔄 🎦 Tool new doc-333468774878		0/1			Document	Product Engi	DE Senior [
People	🖃 🔲 🗁 09_Quality Planning					Workspace F		
Schedule	💽 📄 🗁 Control Plans					Workspace F		
Issues	🕀 🔲 🗁 Measurement Reports					Workspace F		

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

Name 🔺	۲		Drop	D
🖃 🗌 🎽 P-0000110				
🕀 🔄 🗁 01_Form Team		(
🕀 🔄 🗁 02_Phase Sign Off				
🗊 🏳 🏳 03 Open Issues Deck			14 33	=

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



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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 Approval Tasks	Pro	jects	Issues	Approval Iss	ues I	/ly Calendar			
Tasks Filter.Assigned Tasks									
/ 📮 🛄 - 🗐 - 📰 💭 🏹 😫 🎉 🖄 -									
Name	۵	Slip Days	Ð	5	State	% Complete	Project		
Lab Testing and Equipment	E.	30	0	0	Assign		RFQ000009-01		
Supplier Nomination	E.	29	0	0	Assign		Test Stanley Muller		
Tool manufacturer kick-off	Ŷ	3	2 🖹 🎦	0	Review	100	Test 1 Attilio		
Manufacturing Resources	0	0	0	0	Assign		RFQ-0000018-01		
Tool design design reviews ;		0	0	0	Assign		Test 1 Attilio		
Design Freeze		0	0	0	Assign		Test Stanley Muller		
PLS PHASE 3 - Production D		0	0	0	Assign		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 "+"

	mouniou . //2//2010 4.40.1111						
Test 1 Attilio	Actions - Edit - 🖉 😹 🌉 - 🛄 -	-	-	1] 🖓	" 🔳 🔆 -	
Collaboration	Name •	Â	۵.	Drop	Drag	Type	Document T
Details		Ľ.	-	2.00		.11	
Execution	🖃 🕅 🎽 Test 1 Attilio					Project Space	
Experiments	🖃 🔄 🗁 07_Product Engineering					Workspace F	
	Image: Sector 2 dec and as 012460770272		0/1			Document	Product Eng
Financials	■ □ ■ 101de107 doc eng ee-213408772373		0/1			Document	Floduct Elig
Folders	🕢 🔄 🎦 folder07 doc eng-233468772810		0/1			Document	Product Eng
Objectives	💽 🔄 🎦 Tool new doc-333468774878		0/1			Document	Product Eng
People	🗖 🎦 09_Quality Planning					Workspace F	
Schedule							
lecure							

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Step 2 Select the link related to the document to revise: the form with document details opens.

Tool new doc-3334687748 Tool new doc Document (0) Tool new doc	378 Tool new doc	State : Frozen ← Re Owner : Test Everything Modified : 1/27/2016 4:32	eleased → Obsolete	1
Files File Versions	Name		Title	Revis
Revisions	Tool new doc-3	33468774878	Tool new doc	0
Issues				
Routes				
Discussions				

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-3334687 Tool new doc Document (0) Tool new doc	^	78 Tool new doc	State : Frozen · Owner : Test Eve Modified : 1/27/20	← Released → rrything 016 4:32:46 PM	Obsolete			l
Files		Neme		Title	D deler	Decemintion	Chata	
File Versions		Name		The	Revision	Description	State	ŀ
Revisions		Tool new doc-33	33468774878	Tool new doc	0	Tool new doc	Released	
Issues		Tool new doc-33	33468774878	Tool new doc	1	Tool new doc	In Work	
Routes								
Discussions								
Retention Schedules								
Lifecycle								

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

Name	e 🔺	٢	8	Drop	Drag	Туре	Document Type	Document Approver Role	Title	Actions	Rev	Ver	C
= 🗌 🏹	Test 1 Attilio					Project Space							٦
] 🗁 07_Product Engineering					Workspace F				2			F
+	🔲 🎦 folder07 doc eng ee-21346877:		0/1			Document	Product Engi	EE Senior Electrical Eng	fold	N 77 6 19	0	1	t
+	folder:37 doc eng-23346877281		0/1			Document	Product Engi	DE Senior Design Engin	fold	<u>∎</u> 48 6	0	1	t
+	🔽 🎦 Tool new doc-333468774878		0/1			Document	Product Engi	DE Senior Design Engin	Tool		0	2	1
+	🖸 🎦 Tool new doc-333468774878)	0/0		≡	Document	Product Engi	DE Senior Design Engin	Tool	N G	1		٦
+	🗁 05_Quality Planning					Workspace F				2	-		(

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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

Actions - Edit - 🖉 🛃 🏭 🚺	- 🔜 📲 🖉 🕇
🗌 Name 🔺 🦉 🎽	dd to Clipboard J Typ
🖃 🗌 🎢 Test 1 Attilio	ew / Add to Collections
Image: Product Engineering	Wo
💽 📃 🎦 folder07 doc eng ee-21346877	: 0/1 Dor
💽 💽 folder07 doc eng-2334687728	1 0/1 Dou
💽 🔄 🎦 Tool new doc-333468774878	0/1 Dor
🛨 🗹 🎦 Tool new doc-333468774878	0/0
🕀 🔲 🗁 09_Quality Planning	Wo

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

Shortcuts	?
Recently Viewed	
 Clipboard 	$\overline{}$
E Tool new doc	$\overline{}$
	Close
I.	

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Step 5 Select task deliverable from task list

Tasks Approval Tasks	Projects	Issues	Approval	Issues I	Ay Calendar				
Tasks Filter:Assigned Tasks									
/ 📮 📪 🖩 📰 - 📰 🖉 🏹 😫 🎉 🧏 -									
Name	🔒 Slip	Days 🖶	5	State	% Complete	Project			
Lab Testing and Equipment	30	0	0	Assign		RFQ000009-01			
Supplier Nomination	29	0	0	Assign		Test Stanley Mul			
Tool manufacturer kick-off	1 3	2 📑 🍯	0	Review	100	Test 1 Attilio			
Manufacturing Resources	0 🔶	0	0	Assign		RFQ-0000018-0			
Tool design design reviews ;	0		0	Assign		Test 1 Attilio			
Design Freeze	0	0	0	Assign		Test Stanley Mul			
PLS PHASE 3 - Production D	0	0	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



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Select document and press Submit

Search Refinement	Search Results	Results: 1, 1 selected
Case Sensitive	✓ Name ▲	Revision Type Title 🛭 Descripti
Limit to 100 results		1 Doc Tool Tool new
Type Change Process Abstract Production C Name		
Revision	< >	< >
State		Submit Close

Deliverables table is updated with new document revision

Tool design design revie Assignees	Deliverables Actions - Image: Construction of the second secon											
Issues Collaboration			÷	Name 🛆	Title	Rev	Ver	Туре	Actions	Description	Document Approver Role	Document Type
Deliverables Dependencies Efforts		0/0		Tool new doc-333468774878	Tool new doc	1		Document	5	Tool new doc	DE Senior Design Engineer	Product Engineering
Properties												

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

I									
Actions - Edit - Type	No U 1 U	<u> </u>	iii 📀 🖉	æ 🎝 🗋	-	88	-	n 7 1	a .
		-			-				E
Name	Туре	ld 🔺	Dependency	Ð		State	%	Progress	D
🖃 🔲 🕑 Tool manufacturer kic	Task			2 🖻 🖿	F .	Assign	0.0		

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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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)

Gate 2 delvierable as	Active + Review + Complete
discussed during meeting at	Owner : joseph.zammit
MEM	Modified : 10/16/2015 12:31:16 PM
Turne Nie	

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

Capacity analysis and	State : Active 🗲	Review
confirmation (matrix) PQ; quote	Owner : joseph.zar	nmit
analysis and alignment - NOTE:	Modified : 10/16/20	015 12:33:00 PM

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

 Collaboration and Approvals Home Engineering User 	Tasks Approval Tasks	Projects	Issues	Appro	val Issues	My Ca	llendar			
Home Project User	🗌 Name 🔺			Title	Туре	State	Instructions	Due Date	Context	Ø
Home	🗆 🖻 IT-0000138		^	IT-000	Approve	Assigned	Check task	Oct 30	R-000	1
Issues Summary			-							
Shortcuts										
Collections										
Tasks										

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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.

		010 4.00.02 H M		
Approval Gate	Properties			
Routes	Accept Task	2 %-		
Revision	Message			
History	Originated	Oct 16, 2015 4:35:01 PM		
	Allow Delegation	Yes		
	Routes	🖷 R-0000142		
	Approval Status	None		
	Task Requirement	Optional		
	Comments			

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

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

Drop Images here IT-0000138	State : Ase Owner : evar (1) 1 • Modified : 10	igned → Review IS /16/2015 12:33:00 PM			<h <<="" th=""><th>Ø</th></h>	Ø
IT-0000138	Properties					к ^я
Routes		×2-				
Revision	Change Assigne	P 0 0	Owner	joseph.zammit		
History	Edit Details	3, 2015 12:32:58 PM	Due Date	Oct 30, 2015 5:00:00 PM		
	😤 Approve		Assignee	Evan Stringos		
	Reject	0000139	Action	Approve		
	🔒 Abstain		State	Assigned		
	тазк кецигеттеть	Optional	Instructions	Check task contents		
	Comments		Route Owner Review	No		
	Content	' 😧 🔆 - Description			State Condition	⊭ [≭]
	Make-Buy decision	Capacity analysis and confirmation (matrix) F we should buy in EUR	°Q; quote analysis and alignment - NOT	"E: what we sell in EUR	Review	

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In both scenarios, a comment is mandatory

Edit Task Details	Edit Task Details
≫~	
Fields in red italics are required	Fields in red italics are required
Due Date	Due Date
Oct 30, 2015 5:00 AM V Clear	Oct 30, 2015 🛗 5:00 AM 🗸 Clear
Assignee	Assianee
Evan Stringos	Evan Stringos
Comments	Comments
Approve Cancel	Reject Cancel

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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

	Drop images here Task (5814	cisi 448	on 199503	State : Active ← Owner : joseph.zam Modified : 10/16/20	R nmit 115	eview → Col : 3:01:56 PM	mplete No			
	Make-Buy decision		Close	Actions - Edit -	I G	ask 🗸		א אין אין 🔁 😣	»	• »
	Assignees									
	Issues		🗌 Name			Туре	ld 🔺	Dependency	Ð	
	Deliverables Notes			Make Ruy decision		Tack			0	P
	Collaboration			Make-buy decision		IdSK			U	
◀	Deliverables									
	Dependencies									
	Efforts									
	Properties									
	Risks		<		>	<				>
	Routes & Annrovals	¥	Filter:Task Sc	hedule View, Tasks						1 object

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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	5.	
	Project users can manage and close issues; users can create and manage t	ask 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.

PDPLS 1	Issues Meetings													
Collaboration	😑 - 🖉 🗔 🕞 🗔	-		🚱 🗐 🔆 -										
Details														
Execution	□ Name ▲	Edi 🏠	6	Reported Against	Classification	Description	Visibility	Domain	Action Taken	Priority	% Complete	Assignees	Edit Appr	ove
Experiments												Kevin Bora		^
Financials	□ la ISS-0000007		1 🔛	PDPLS 1	Issue - A probl	Customer drawings	External	Design	13.9.11 - Su	Low	50	Evan String	J	
Folders	🗆 👆 ISS-0000008	/	0	PDPLS 1	Issue - A probl	Internal drawings + tollera	External	Design	13.9.11 - Th	Low	50	Kevin Borg	1	
Objectives	□ k ISS-0000009	/	0	PDPLS 1	Issue - A probl	Connector colours	External	Desian	13.9.11 - To	Low	50	Kevin Bora	1	
People														
Schedule	□ la ISS-0000010		0	PDPLS 1	Issue - A probl	Size of graphic	External	Design	13.9.11 - Fin	Low	50	Kevin Borg	1	
Issues	□ la ISS-0000011	/	1 🛅	PDPLS 1	Issue - A probl	Illumination (graphic)	External	Design	13.9.11 - No	Low	50	Test Everytl	P	
	🗆 🖢 ISS-0000012	/	0	PDPLS 1	Issue - A probl	Illumination JEWEL	External	Design	03.05.12 - In	Low	50	Test Everytl	P	
	🗆 🖢 ISS-0000013	/	0	PDPLS 1	Issue - A probl	DFMEA	External	Design	13.9.11 - Stil	Low	50	Test Everytl	ø	
	🗆 👆 ISS-0000014	/	0	PDPLS 1	Issue - A probl	Header	External	Design	13.9.11 - JL	Low	50	Kevin Borg	ø	
	🗆 🖢 ISS-0000015	/	1 🗈	PDPLS 1	Issue - A probl	Plunger	External	Design	13.9.11 - ne	Low	80	Test Everytl Kevin Borg	1	~
	Filter.Active	¢											> 70 obje	ects

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

Create	 →	Assign	_ →	Active	_ →	Review	 Closed

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2.1 Update issues information

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

 Collaboration and Approvals 	PowerView							<	*
Home	Tasks Approval Tasks Approval Issues Projects My Calendar Messages								
Home RFQ User] ү (😫 🗐 🔆 •						
Home Engineering				-	-				
User	Name 🔺	Edi 🏠	Ð	Reported Against	Classification	Description	Visibility	Domain	Action Taken
Home Change Management User	🗌 🖢 ISS-0000129		0		Issue - A probl	Check drawing from cust	External	Des	
Issues Summary	🗌 🖢 ISS-0000137		0	P1	Issue - Aprobl	test design	Internal	Des	12.16.2015
Shortcuts									
Collections	□ ┣ ISS-0000172		0	000000050	Risk - Probabi	Change for obsolelesce	Internal	-	
Subscriptions									
▼ Team									
Warkapaaaa									

The Issue assignee can update field Action Taken and %Complete

Edit Issue Details				
🗟 🔆 -				
	Fields In red Italics are required			
% Complete	10 🗸			
Action Taken	Design started			
Issue Details				
Action Taken				
Classification	Risk - Probability of project damage � needs planned mitigating actions	Visibility	Internal	Domain -
Description	Change for obsolelescenze			
Priority	Low	Estimated Finish	Jan 28, 2016	Approver
				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.

52

o comprete			
Action Taken	Design started		
Issue Details			
Action Taken	04.18.2016;Matthew	v Spiteri;De lign started	
Classification	 Rick - Probability of needs planned n 	nrojner damage nitigating actions	Inter
Description	Change for obsolele	escenze	
Priority	Low	Estimated Finish	Jan: 2016
Version	1	Date:	18-April-20
Status	Template		

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

Tasks Issues Appro	val Ta	isks	Approval Is	ssues Projects	My Calendar	Messag
📮 🛄 - 📕 🔁 🏹	7	' 🛃 [≣ % -			
Name 🔺	Edi		Ð	Reported Against	Classification	Description
🗌 🖢 ISS-0000129	P		0		Issue - A probl	Check draw
🗌 🍇 ISS-0000137	P		0	P1	Issue - A probl	test design
🗌 👆 ISS-0000172	P		0	000000050	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

Play						\frown	
Drop Images here	test design State : Assign 4 Owner : Test Eve Modified : Dec 16	rythin, 2015	Active 9 9:55:2	21 AM	Review	Drop files here)
ISS-0000137	😑 • 📜 • 🖉	7	X	-		$\overline{}$	
Assignees	▼ Create New	F					Document
Reference Documents	Document	Rev	Ver	Туре	Actions	Description	Approver
Reported Against	Add Existing						Role
Routes				No	Objects F	ound	
Lifecycle	🖄 Download						
History	🗟 Checkout						
	- Remove						
	× Delete						

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

	1
-	1
Drop	1
files	1
	1
here	1
	1

and drop it with the mouse over the **binned** 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)

Drop Images here Issue	test design	State : Assign + Owner : Test Everyth Modified : Dec 16, 20	Active Review ing 15 9:55:21 AM		Drop files here	PLM imple	ementation.	рр	1.K	3
ISS-0000137	≣ • 🔒	- 🔂 - 🚺 🏹	₹ 🔆 -							
Assignees									D	Ē
Reference Documents	🗆 🖴 🗢	Name 🛆	Title	Rev	Ver	Туре	Actions	Description	Approver	[]
Reported Against									Role	
Routes	0/1	DOC-0000213	PLM implementation.pptx	0	1	Document	a 🛓			
Lifecycle										

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

test Stat Owr Moo	e : Create + Assign + Active Drop rer : Test Everything ified : Mar 8, 2016 3:41:57 PM									
Properties				× ×		As	signe	es		
/ 🔊 🗖	🗟 🎇 -					÷		卢		27 😪 🖇
Name	ISS-0000174						_			
Classification	Issue - A problem that requires action to resolve	Visibility	Internal	Domain	[Name	Δ	User Name	Company
Description	test						Ar Jo	seph		METHODE
Action Taken] [Za	ammit	joseph.zammit	ELECTRONICS
Priority	Low	% Complete	0							
Estimated Finish	Feb 29, 2016									
Actual Start										
Actual Finish										

Or using the Edit plus icon in the Assignee panel

	Drop Images here ISS-0000174	test	State : Create + Assig Owner : Test Everything Modified : Mar 8, 2016 3:41	n → Active Drop files here
(ISS-0000174 Assignees	Na		User Name
	Reported Against	■ 4	' Joseph Zammit	joseph.zammit
	Resolved By			
	Resolved Items			

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

Search Refinement	Search Results 1 - 42 of	approx. 42 Results Page Size:	50) (Max Value: 1000)
Q.	ੋ 🗄 🗹 - 👘 - 📑 -	📰 • 🔜 🇮 🎇 •	
State: Active	🗌 Name 🔺	User Name	Company
 Taxonomies 	David Debono	davidd	
 Types 	David Zammit	DavidZ	METHODE ELECTRONICS
Person(42)	Edward Gingell	Edward.Gingell	METHODE ELECTRONICS
	🗆 Elias Moussa	elias.moussa	METHODE ELECTRONICS
 Attributes 	Evin Stringos	evans	METHODE ELECTRONICS
Name	Eugenio Vella	Gino.vella	METHODE ELECTRONICS
Originated	Giuseppe Loreto	giuseppe.loreto	METHODE ELECTRONICS
Modified	Gregory Joslin	Gregory	METHODE ELECTRONICS
Description	🔄 Jason Giordmaina	jasong	METHODE ELECTRONICS
Description	🗍 Jessica Camilleri	iessicac	METHODE ELECTRONICS
Change Assignment	v < >>		
< >>			Done

Version	1	Date:	18-April-2016	
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

Email Primary User
RONICS Evan.Stringos@methode-eur.com
RONICS Matthew.Spiteri@methode-eur.com Primary
\bigcirc

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.

Home	Tasks Issues Appro	oval Tasks	Approv	al Issues	Projects	My Caler	idar Messages		
Home RFQ User	🗖 📑 🖓 🖓 🖓 🖓] 💙 🚱	圓义	2-					
Home Engineering							-	Estimated	Actu
User	Name 🔺	Visibility	Domain	Action Taken	Priority	% Complete	Approver	Finish	Star
Home Change Management User	🗌 🖢 ISS-0000129	External	Design		Low	0		Oct 3	
Issues Summary	🗌 🖢 ISS-0000137	Internal	Design	12.16.2015	Medium	10	Johann Barbara	Nov	Dec
Shortcuts	□ k ISS-0000172	Internal	-		Low	0	\sim	Jan	
Collections						-			
Subscriptions									

The issue table contains a column with Approver user.

The information is available also during the issue update

Edit Issue Details					
🚱 🔆 -					
	Fields in red Italics are required				
% Complete	10 🗸				
Action Taken					
Issue Details					
Action Taken	12.16.2015;Matthew Sp	iteri;I m styart to wokr o	n tyhis issu	e	
Classification	Issue - A problem that requires action to resolve	Visibility	Internal	Domain	Design
Description	test design				
Priority	Medium	Estimated Finish	Nov 30, 2015	Approver	Barbara, Johann
				Done	Cancel

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.

Approvals	PowerView					<	
Home	Tasks Issues A	pproval Tasks	Approval Issu	ues Projects	My Calendar	Messages	
Home RFQ User	Close Reject 🗔 🗍] · 📑 - 🔜		2 🗏 🛠 🛛			
Home Project Lead							
Home Change	🔲 Name 🔺	Edi 🏠	₽ Re	eported Against	Classification	Description	Vi
Issues Summany	🗌 🖢 ISS-0000137	/	1 🖹 🛛 P1	1	Issue - A probl	test design	In
Shortcuts	🔲 🖢 ISS-0000167	/	0 P1	1	Issue - Aprobl	Housing tool not yet finali	In
Collections							
Subscriptions							

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.

	Tasks	Approv	al Tasks	Pr	ojects	Issues	Appro	val Issues
(Close	Reject			-	+	70	篇 🛠 -
	\smile	\smile						
	✓ Name	•		Edi	♠	Ð	Repo	rted Against
	✓ <a>b IS:	<u>S-0000105</u>		ø	F.	0	Phase	e 1 (Project
	3 10.1.68.28	8111/enovia/co	ommon/emxN	lavigatorl	Dialog.jsp		÷	£ ▼
	Reject							
	≫~							
			Fields in red its	alics are re	equired			
\langle	Comments	>						
						Don	e Cano	cel

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.

Version	1	Date:	18-April-2016	
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.

Tasks Issues My Cal	endar					
Tasks Filter:Assigned Tasks						
🖉 🗔 - 📑	- 🔳 🤇] 💎 🔮	, 🗐 🔆 -			
🗌 Name 🍙	Slip Days	; B	6	State	% Complete	Project
Project Kick-Off by custom	0	0	0	Active	e0	PDPLS 1
Kick-off meeting at custom	0	0	0	Active	50	PDPLS 1
Project Kick-off MEM - PRF	0	0	0	Assign		PDPLS 1
Methode recieves all desig	0	0	0	Assign		PDPLS 1
Design Freeze	0	0	0	Assign		PDPLS 1
PLS Gate 1 - Review and \$	0	0	0	Review		PDPLS

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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Status	Template			59

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

i cad-srv-apo	lev. methode-emea.local :9090/3dspace/common/emxCreate.jsp?nameField=autoName&p	olicy=policy_Is	sue&showPo	licy=false&form	=type_PDS_IssueCreate&
PDPLS Crea	te New				
*≁					
	Fields in red italics are required				
Туре	Issue				
Classification	Issue - A problem that requires action to resolve	Visibility	Internal	- Domain	Design 🔹
Priority	Low	Estimated Finish			
	New issue				
Description					
•				_(
					Done

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.



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.

				wou	neu : si mzo io s	.07.04 AW					
PDPLS	S 1	Activities Estima Gantt Cha	irt Phase	Gate	View						
Collabo	oration	Close Actions - Edit - Type	No	- 4	= 🚟 🙆 🔥	/ 🗷 🔍		I 📷- 🗐		n 🤝 🖼	- % -
Details	;	lask	¥ 1	V		000 00 0		0			
Execut	tion	□ Name	Туре	ld 🔺	Dependency	Ð		5		State	% F
Experir	ments		Project S				Ē	70 ka ka (i		Active	16.0
Financ	ials								_		
Folders	s	🛨 🛨 🗌 🗹 Customer Milestone	Phase	1		0		0		Create	0.0 [
 Objecti 	ives	🖃 🔶 🗌 🕑 PLS PHASE 1 - Prog	Phase	11		0		0		Active	23.2
People	•	🖶 🗕 📄 🗭 Manage the Proje	Task	12		0		-		Active	32.6
Schedu	ule						-			A	
Issues		Project Kick-Off by	lask	17		2 •] •]		18	100	Active	60.0
		🖃 🗕 💟 Project Kick-off ME	Task	18	17:FS+0.0 d	0		U	♠	Complete	100.0
		< · · · · · · · · · · · · · · · · · · ·	<								
		Filter:Task Schedule View, Tasks									

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Status	Template			60

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

	Modified : Apr 13, 2	2016 3:3	36:12 PM							
P1	Issues Meetings									
Details	😑 - 🥒 🗔 🔍 - 🗔	-] 🖉	7 😪	≣ ‰-					
Execution										
Folders	Name 🔺	Edi		Ð	Reported Against	Classification	Description	Visibility	Domain	Action Ta
People Schedule	🗌 🄄 ISS-0000130	1		0	P1	Issue - A probl	test design	External	Des	11.12.20
Issues	🗌 👆 ISS-0000131	ø		0	Make-Buy decision	Issue - Aprobl	test design 2	External	Des	
<u> </u>	🗌 🖢 ISS-0000134	ø		0	Client ramp up p	Issue - Aprobl	Check drawing	Internal	Des	
	🗌 🖢 ISS-0000137	ø		1 🖻	P1	Issue - Aprobl	test design	Internal	Des	12.16.20
	🗌 👆 ISS-0000150	ø		0	P1	Issue - Aprobl	check the design	Internal	Des	
	🔲 👆 ISS-0000160	ø		0	P1	Risk - Probabi	test'test	Internal	Des	

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

2.6 Issue details

 Collaboration and Approvals 	PowerView	
Home Change Management User	Tasks Issues App	roval Tasks Approval Issu
Home Engineering User		
Home Manufacturing User	■ Name ▲	
Home Project Lead		
Home RFQ User	E ISS-0000180	0
Home	🔲 🔄 ISS-0000185	<i>₽</i> 0

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

The Issue view aggregates in one page and provides access to related items such as 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.

	^ م								
Name ISS-0000007									
User a	Primary								
Classification Issue - A problem that requires action to resolve Visibility External Domain	User								
Description Customer drawings METHODE Evan St	tringos@methode-								
Action Taken 139.011 - Submitted 1 variant and got some feedback from JLR.	1								
Action Taken 10.3.11 - Vie need to service of source of the transferror tool kick-of 15.11.11 - Submitted .	org@methode-								
Priority Low % Complete 50									
Estimated Finish Mar 1, 2014									
Actual Start Jun 19, 2015									
Artual Finish	Page I ✓ of 1 I								
Reported Against Resolved B Reference Documen									
E 🕒 👻 Name 🛆 Title Rev Ver Type Actions Description	on State								
0/1 DOC-0000057 DS Incident 2015-09-07.xlsx 1 1 Document 🔊 🛓 🔂	In Work 🔤								

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 Sum	nmary P	riority =	= High							<	< >		lide Pane	ソ
o - 18	-	7		-										
													Issues I	by Pric
Name 🔺			Edit	٢	Ð	Repor	rted Against	Clas	sification	De	scription			
b 188-000	0169		2		0	Com	nile and su	Issu	e - A probl	Lo	an't comple	te	Urgen	t 0
g 100 000	0100		9		Ŭ.	Oom	pilo dila od	1000	e Aprobi.		antcompre		High	۲
b ISS-000	0174		1		0	0000	000010	Issu	e - A probl.	. tes	st		Medium	۰.
				_									Low	V
												1	're-assigned	0
ues Summary													〈舎	< >
• 📰 • 🔜	7 🗐 🛠	-												
		_												
ne 🔺	Edit	٤	Ð	Reported A	gainst	Classification	Description		Visibility D	omain	Action Taken	Priority	% Complete	Approve
ne 🔺	Edit 2	ŝ	€ 0	Reported A	gainst	Classification	Description Check drawing from	ı cust	Visibility D External D	omain)esign	Action Taken	Priority Low	% Complete	Approve
ne 🔺 ISS-0000129 ISS-0000137	Edit 2	<u>ک</u>	0	Reported A P1	gainst	Classification Issue - A probl Issue - A probl	Description Check drawing from test design	ı cust	Visibility D External D Internal D	omain)esign)esign	Action Taken	Priority Low Medium	% Complete 0 100	Approve
me ▲ ISS-0000129 ISS-0000137 ISS-0000157	Edit P P P		0 1 •	P1 Bosch	gainst	Classification Issue - A probl Issue - A probl Issue - A probl	Description Check drawing from test design I dont have enough	ı cust	Visibility D External D Internal D	omain Design Design Design	Action Taken 12.16.2015	Priority Low Medium Low	% Complete 0 100	Approve
me _ ISS-0000129 ISS-0000137 ISS-0000157 ISS-0000158	Edit 1 1 1 1		0 1 P 0 0	Reported A P1 Bosch Bosch	gainst	Classification Issue - A probl Issue - A probl Issue - A probl Issue - A probl	Description Check drawing from test design I dont have enough check dimensions) cust	Visibility D External D Internal D Internal D	omain Design Design Design Quality	Action Taken	Priority Low Medium Low	% Complete 0 100 0	Approve Johan
me ▲ ISS-0000129 ISS-0000137 ISS-0000157 ISS-0000158 ISS-0000166	Edit 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1			P1 Bosch Bosch	gainst	Classification Issue - A probl Issue - A probl Issue - A probl Issue - A probl Risk - Probabi	Description Check drawing from test design I dont have enough check dimensions tes	ı cust	Visibility D External D Internal D Internal D Internal D Internal D	omain Design Design Design Quality	Action Taken 12.16.2015	Priority Low Medium Low Low	% Complete 0 100 0 0 100	Approve Johan
me	Edit I I I I I I I I I I I I I I I I I I	* 	D C	P1 Bosch Bosch Compile at	ngainst	Classification Issue - A probl Issue - A probl Issue - A probl Issue - A probl Risk - Probabi Issue - A probl	Description Check drawing from test design I dont have enough check dimensions tes I can't complete the	reso	Visibility C External C Internal C Internal C Internal C Internal C	omain Design Design Quality Design	Action Taken	Priority Low Low Low Low Low High	% Complete 0 100 0 0 100 100	Approve

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.

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

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

	Drop Images here PLS Gate 1 - R	?ev 33	view & Si 43782	gn off	State : Cre Owner : Tes Modified : 6	eate Review t Everything /4/2015 2:01:26	Complete		Q	-
	PLS Gate 1 - Review & Si	^	Add	Remove Se	elected /	Assign as Task	. / 🔒	•••	N N	
	Assignees		User	r Name		Email	Company	Assignee Role	% Allocati	ion
	Collaboration			Brand Mana	ger,Demo	a@a.it	Company N	Task Assignee		100.0
	Dependencies									
٩	Properties									
	Risks									
	Routes & Approvals	1								
	Images		<		>	<				>
	Activities Estimation	~							1	object

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

Collaboration and Approvals	PowerView				
Home	Tasks Issues	Approval Tasks	Appr	oval Issues	Projects
Home RFQ User	Tasks Filter:Assigned	Tasks			
Home Engineering User		.) 🖬 - 🔜 🖉	7	Q. 🗐 💥	↓
Home Change Management User	Name	* Create New Table View.		5	Stat
Issues Summary	Change in led col	Assigned Tasks		0	Rev
Shortcuts	Tool design reviev	All		0	Rev
Collections		Completed Tasks		0	Boy
Subscriptions				U	Rev
Team	BOM Concept	97	0	0	Ass

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.

 Collaboration and Approvals 	PowerView								
Home	Tasks Issues Approval Tasks Approval Issues Projects My Calendar Messages								
Home RFQ User	me RFQ User Tasks Firer:Assigned Gates								
Home Engineering User									
Home Change	Name	٨	Slip Days	Ð	6	State	% Complete	Project	Est Start
Management User	Cate 1 - Review and Sign off		0	0	0	Create		D1	Oct 15, 2015
Issues Summary			0	U	U	Create			0013,2013
Shortcuts	Gate 2 - Review and Sign off		47	0	0	Create		Test Export	Feb 11, 2016
Collections									
Subscriptions									
r Team									

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.

Approvals								
Home	Tasks Issues Approv	al Tas	ks Ap	oproval Issu	es Projec	ts M	y Calendar	Mes
Home RFQ User	Tasks Filter:Assigned Gates							
Home Engineering User	/ 📮 📑 🖬	•	2 🔽	7 🗟 🎚	Ī ≫			
Home Change	Name	۵	Slip Days	5 B	5	State	% Complete	
Issues Summary	Gate 1 - Review and Sign of		0	0	0	Create		
Shortcuts	Gate 2 - Review and Sign off		47	0	0	Create		
Collections								
A 1 1 1 1								

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

Second Fire		1	Mudilled . Mar 21, 2010 11.37.42	AM				
Gate 1 - Review and Sign								
Assignees	Checklists Deliverables							
Issues	/ 黒 黒 - 💷 - 🎟 - 📰 / 🗮 🛠 -							
Collaboration	Name	Responsible	Description .	Response	Comments			
Dependencies	Gate 1 - Review and §		Gate 1 deivierable as dis					
Properties			04 Decementation at all					
Routes & Approvals			01. Program Manager as					
Activities Estimation	🕀 🗕 📄 CH_02. Prelimin		02. Preliminary Cross-fu					
	🛃 🔶 🔄 📴 CH_03. Custom		03. Customer Inputs:					
	🖚 🗖 📴 CH_04. Comme		04. Commercial and Pro					
	🛨 🔶 📄 🕑 CH_05. Deviatio		05. Deviation checklist					
	🗈 🕂 📄 🖪 CH_06. Purchas		06. Purchase Orders					
	🛨 🔶 📄 🖹 CH_07. Program		07. Program Funding Re					
	🗈 🕂 📄 🖹 CH_08. Design (08. Design Goals under					
	主 🗕 📄 CH_09. Baseline		09. Baseline B.O.M. rele					
			10. DFA/ DFM Checklist i					

Version	1	Date:	18-April-2016	
Status	Template		67	

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

Gate 1 - Review and Sign										
Assignees	Checklists Deliverables									
Issues	ें 🗶 😹 🎝 - 🛄 - 🗔 - 🛽	🗄 - 📄 🧹	7 🗐 🔆 -						_	_
Collaboration	Mass Update							(Sav	re Res
Dependencies	Name	Responsible	Description .	Response		Comments	Completed By	Туре	State	Modified
Routes & Approvals	🖃 🗌 🕑 Gate 1 - Review and Sign o		Gate 1 deivierable as discussed dur					Gate	Cre	Mar 21, :
Activities Estimation	🗧 🗕 🗕 📄 CH_01. Program Mana		01. Program Manager assigned					Checklist	Active	Oct 16, 2
	🖷 🗕 🗋 👸 Cl_01. Program Ma	٣	01. Program Manager assigned	1 ^	3	r		Checklist	Exists	Oct 15, 2
	📄 🗕 📄 🔯 CH_02. Preliminary Cr		02. Preliminary Cross-functional Ro	2				Checklist	Active	Oct 15, 2
1	🗧 🗕 🗋 🔞 Cl_02. Preliminary (٣	02. Preliminary Cross-functional Ro	4	3	٢		Checklist	Exists	Oct 15, 2
	🕒 🗕 🖿 🔯 CH_03. Customer Inpi		03. Customer Inputs:	5 🗸				Checklist	Active	Oct 15, 2
	🗧 🗕 🛄 📴 CH_Component Te		Component Technical Specification	\sim				Checklist	Active	Oct 15, 2
	🖃 🔶 📄 🔞 Cl_Customer Re	٢	Customer Requirements Checklist	3	3	,		Checklist	Exists	Oct 15, 2
	🗧 🗕 🗌 🔞 Cl_Customer Manu	F	Customer Manufacturing Requirem	Ŷ	3	٢		Checklist	Exists	Oct 15, 2

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
2	3
5	5
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

3DEXPERIENCE	ENOVIA Project Execution	All Search
(7614605552 0000003-01 Test	State : Creat + Review Owner : kevino Modified : Apr 13, 2016 p.so.	Complete SS PM

- Use the command available in Lifecycle tab

Crop Images here Crop FC Gate (7614605 RFQ-0000003-	State : Create + Review + Complete 3552 Owner : kevinb
TFC	Properties Lifecycle History
Assignees	Lifecycle
Issues	TFC rev 761460555286094: Lifecycle
Collaboration	
Dependencies	
Properties	Create
Routes & Approvals	
Activities Estimation	
	Tasks/Signatures Approvals

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

Notice: Checklist Items are not comp	pleted
Ok	

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
- <u>Create Route</u>: 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
- <u>Create Route Wizard</u>: 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
- <u>Create Simple Route</u>: 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
- <u>Manage Route Approvals</u>: 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

CR-0000117 Create	Route
⅔+	
	Fields in red italics are required
Туре	Route
Name	✓ AutoName
Template	CN: Review Content Clear
Description	Review CN
Route Base Purpose	Review 🗸
Scope	 All Organization Select Scope
Route Completion Action	Notify Route Owner
Auto Stop On Rejection	Immediate 🗸
	Done Cancel

3.4.1 Create Route

Attribute details:

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

Route Name: autoname is provided

-≪		
Tuno	Fleids in red Italics are require	ď
Type	Roule	
Name		Autoname

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

Search Refinement		Sear	ch Results 1 - 11 of	approx. 11	Results Page Size: 50) (Max Value: 1000) 📧 4	1 🕨 🔛
	23	F	Q- 💁- 📑- 🛛	, + ,	▦ ‰-	
By State: TRUE State: Active		Name	•	Revision	Description	
	^	00	CN approve test	1	CN approve test	
 Iaxonomies 		0°\$	CN Change Request CM	1	CN Change Request CM Approval	
▼ Types		00	CN Change Request LM.	1	CN Change Request LM Approval	
Route Template(11)	_ (CN Review Content	1	CN Review Content	
 Attributes 		00	Deviation Approval	1	Deviation Approval	
Marrie		_	EBOM Approve	1	EBOM Approve	
Name	- 1	0 \$	EBOM Review	1	EBOM Review	
Originated		0 \$	GATE Approve	1	GATE Approve	
Modified		00	GATE approve test	1	GATE approve test	
Description		⊘⊕	MBOM Approve	1	MBOM Approve	
Comment		0	MBOM approve test	1	MBOM approve test	
LABEL	~	<	>	<	C	
<	>					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	~	
	Approval		F
	Review		
Scope	Standard		DI.

- 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	~
	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 V
rejection	Immediate
	Deferred

The route created is not started automatically

est	Test for process State : C Owner : jo Modified : I	reate ← Evaluate → In Review e.budgeja Mar 18, 2016 3:04:23 PM	V Drop files here	ent title(
	Properties Process Deta	ails Affected Items Cha	ange Actions Reference Do	cumen Review Route	es Hist
	≡• ⊒,],- ⊒,-	I 📫 🖉 🏹 🔮 🔆 ·			
	☐ ♠	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							
Fleids in red italics are required.							
Name	Aut	toName					
Template		<u>Clear</u>					
Description				.:!			
Route Base Purpose	Standard V						
Scope	All Organization Select Scope						
Route Completion Action	Notify Route Owner						
Start Route	Upon Wizard Completion Manually						
Auto Stop On Rejection	Immediate V						
Content							
Name 6	Rev	Ver	State Condition				
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=7 🛛 🦑 🝷
Step 1 of 4: Specify Details
Add Content Remove Selected
Fields in red italics are required.

Content				
Name (Pov	Vor	State Condition	
		VEI	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						
□ Name ≠	Туре	Organization	Scope	Access		
🗌 Barbara, Johann	Person	METHODE ELECTRONICS	All	Add Remove		
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 -						
J Add People	уре	Organization	Scope	Access		
Add Role Add Group	Person	METHODE ELECTRONICS	All	Add Remove		
Add Member List	Person	METHODE ELECTRONICS	All	Add Remove		
Remove Selected				Read Read Write Add Remove Add Remove		
javascript:void(0)			Previou	s 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	d.
---	----

Step 3 of 4: Define Route Tasks		
Actions -		
Title, Action & Order	Assignee & Instructions	Due Date & Time (EDT)
Action Comment V Order 1 V	Grima, Samantha	 S:00 PM Clear Advanced day(s) from Route Start Date Assignee-Set Due Date Allow Delegation Requires Owner Review
Review CN Action Comment V Order 1 V	Spiteri, Matthew	Clear Advanced day(s) from Route Start Date Assignee-Set Due Date Allow Delegation Requires Owner Review
Review CN Action Comment Order 1	Barbara, Johann 🖌 Review CN	Clear Advanced day(s) from Route Start Date
		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
 - $\circ \quad \text{Can be defined as a date} \\$

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

۲	 5:00 PM	¥
Clear		

o A number of slip days after route start date

0	day(s) from	1
Route Start Da	ate 🗸	

• 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	⊖Any⊛All
1	Review CN	Comment	
1	Review CN	Comment	
			Previous Done Cancel

- 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 💸 -		
Fleids 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
			賀 Add Member List
Properties 💁 Ren	nove	~	
Content			
Name /	Rev	Ver	State Condition
CR-0000163	-		Evaluate V
<			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.

Manage Roo	ute Approvals	
States	Existing Routes	New Route
Create		Not allowed for past states
Review		
oumpiere		
		Apply Done Cancel

Search Refinement	S	earch Results 1 - 8 of app	orox. 8 Resu	ults Page Size: 50 ► (Max Value: 1000) H H H 1
	2	- Q- 💁 🗔 - 🛛	-	▦ ‰-
State: Active	Na	me 🔺	Revisio	Description
 Taxonomies 	îc	CN approve test	1	CN approve test
▼ Types	С	🕀 CN Change Request CM ,	1	CN Change Request CM Approval
🗁 🗹 Route Template(8)	С	🖓 CN Change Request LM /	1	CN Change Request LM Approval
 Attributes 	C	🐣 CN Review Content	1	CN Review Content
Name		GATE Approve	1	GATE Approve
	C	GATE approve test	1	GATE approve test
Originated	С	MBOM Approve	1	MBOM Approve
Modified	С	MBOM approve test	1	MBOM approve test
Description				
Comment >	× <	>	<	Submit

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.

Ta	asks/Signatures	Approvals				2 ²				
~	📮 🗔 -	7 🚱 🔆 -								
Sho	Show: All Approvals V Approval Status: All V Filter									
٨	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

Content Collaboration	Properties	Process Details Affect	ed Items Cha	nge Actions	Referer
Impact Analysis	•	Name _	>	Route Status	

The page with route details contains several tabs:

R-0000258 CN Review Co ⊕ Route	ontent Owner: joe.bud Modified: Mar 1	lgeja 8, 2016 3:35:47 PM				
R-0000258	Properties Cor	ntent 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) R-0000258 : Tasks (Room Room Image: State of the stat	Tasks (Graphical)	Comment Review CN atthew Spiteri Comment Review CN hann Barbara	→ 31		

- 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

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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

·	Modified .	Mar 10, 2010 3.04.23 PM
CR-0000163	Properties Process De	tails Affected Items
Content	= · 1 ∩ · □ · □	📃 🏞 🖉 🏹 🔕
Collaboration	* Create Route	Name •
Impact Analysis	* Create Route Wizard	
	* Create Simple Route	•@ <u>R-0000258</u>
	* Manage Route Approvals	
	🚣 Set Task Escalation	
	Start/Resume	
	× Delete	
	🕾 Remove	

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 u using a dedicated view in RFQ process. Users have to define Estimated Duration fields and complete the tasks.	sing a Tas	k dashboards or
End	Quotation tasks have the status Complete and an Estimated Duration documents can be uploaded as task deliverables	on compl	eted. Additional
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

 Collaboration and Approvals 	PowerView								
Home	Tasks Issues Approv	al Tasks 🛛 🖌	Approval Iss	ues Proje	ects I	My Calendar Messages			
Home RFQ User	Tasks Filter:Assigned Tasks								
Home Engineering User	/ 📮 📑 🖬	- 🔜 🛃	7 🗟 🛛	≣ ‰•					
Home Change Management User	Name	Slip Days	; €) ∪	الع V	State Assign	% Complete	Project	Est Start	Es
Issues Summary	Engineering Mechanical Res	88	0	0	Assign		RFQ000009-01	Dec 16, 2015	De
Collections	Modification of PCB size/des	86	1 🗈	0	Active	27	CN 0000166	Dec 18, 2015	De
Subscriptions	PLS PHASE 4 - Production L	83	0	0	Active		P1	Oct 15, 2015	De
 Team Workspaces 	PFMEA + QCP for each tool a	69	3 • • •	0	Active	22	Tool1	Oct 23, 2015	Ja
Tronopuedo	Engineering Mechanical Res	60	0	0	Assign		RFQ-0000016.	Jan 25, 2016	Ja
	BOM Concept	60	0	0	Assign		RFQ-0000016	Jan 19, 2016	Ja

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



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

ntroduce Modified	Dec 2, 2015 3:	37:17 PM			^			
Close Load Estimation	Actions -	Edit - Type Ta	sk	V No	0 1 🖳 🚎 🔛 🖉 🗸	🛃 - 🛄 -		- 🔳 (
Name	Туре	Ð 🕯	•	State	Duration/Effort (Hour Cost	Design Cente	Notes	
Engineering Mechar	i Task	0		Assign	0	-		
🖃 🗕 💟 🕅 Misc. Cost	Task	0		Assign	0	-		
🖃 🗕 📄 😭 D-FMEA Engine	Task	0		Assign	0	-		
🖃 🗕 📄 💟 P-FMEA Suppor	t Task	0		Assign	0	-		
🖃 🗕 🗌 😭 D-Reviews Eng	i Task	0		Assign	0	-		
🖃 🗕 📄 😭 D-Reviews Mou	l Task	0		Assign	0	-		
■ → □ 🖗 D-Reviews Star	r Task	0		Assign	0	-		
🖃 🗕 📄 🍟 D-Reviews Mar	Task	0		Assign	0	-		
🖃 🗕 🗌 💆 D-Reviews Sup	Task	0		Assign	0	-		
🖃 🗕 📄 💟 D-Reviews Cus	t Task	0		Assign	0	-		

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

Close Load Estimation Actions	► Edit ►	Type Task	No 1	, ≝ 📲	: • 💉	s- 🗐 -	.		
Mass Update								Save	et
Name	Туре	8		State	Duration/Effort (Hour	Cost	Cost Rate	Notes	
🗏 🗌 😰 Lab Testing and Equipmen	Task	0		Assign	0	r	r	r	^
🗖 🗕 🗖 🔯 🔕 Misc. Cost MTL	Task	0		Assign	0	7 100 euro -	r	٣	
► → □ 🕅 Lab Testing and Deve	Task	0		Assign	0	٣	r	7	
🖃 🔶 🗋 🙆 🙆 D-FMEA support	Task	0		Assign	12 0	r	,	٢	
🖻 🗕 🗋 🙆 🔕 Analysis	Task	0		Assign	24 0	٢	٢	F	
🖻 🗕 🗋 🙆 🔕 D-Reviews Engin	Task	0		Assign	8.0	r	,	Subcontracted	1
🗖 🗕 🛨 🖸 🔕 Testing Jigs Set-I	Task	0		Assign	12 0	F	,		
Administration	Task	0		Assign	0	*	r		
r → 🗌 🗭 Testing	Task	0		Assign	0	r	r		
► → □ 🕅 Report Generation	Task	0		Assign	0	r	r		
	т	n		Accian	r	r	r		
Filter:RFQ View, Tasks								31 ob	iects

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	Туре	Ð	State	Duration/Effort (Hour	Cost	1
🖃 🗌 😰 Lab Testing and Equipmen	Task	0	Assign	56)	
🖃 🔶 🔛 🗭 Misc. Cost MTL	Task	0	Assign	0	100 euro	
🖃 🗕 🗋 🛃 Lab Testing and Deve	Task	0	Assign	56)	
🖃 🔶 🔲 😰 D-FMEA support	Task	0	Assign	12		
■ → □ 🖗 Analysis	Task	0	Assign	24		
🖃 🔶 🔲 😰 D-Reviews Engineerii	Task	0	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 REO. User has to select command from toolbar

Engineering Mee	State : Create 🔶 Assign -> Active								
Images Task (71144906	40438	Owner : tonyd							
RFQ000008-01	introduce	Mounted : D	ec 2, 2015 3:37	7:17 PM					
Engineering Mechanical R	Close Load Est	timation	Actions - E	Edit - Type	Task	V N	0 1 🗸		
Assignees	Name		Туре	Ð		State	Duration		
Issues	🖃 🗌 🕑 Engineeri	ing Mechani	Task	0		Assign			
Collaboration		_							
Dolivorables	🖃 🔶 💟 Misc	: Cost	Task	0		Assign			

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

Search Refinement	Search Results 1-37 of ap	oprox. 37 Results Page Size:	50) (Max Val	ue: 1000) Ri i i i1)
▼ Taxonomies	Name 🔺	Description	Status	Issue Date	Owner	Due Date C
 Types 	OR RFQ-0000016-01	Test RFQ with new naming	RFQ	Jan 18,	Test	Jan 2 ^
Project Management(37)	RFQ-0000016-02	Test RFQ with new naming	RFQ	Jan 18,	Test	Jan 2
Request for Quotation	OR RFQ-0000016-03	Test RFQ with new naming	Con	Jan 21,	Giu	Jan 2
 Attributes 	RFQ-0000017-01	Test 2 RFQ new naming	Con	Jan 18,	Test	Feb 4,
Name	ON RFQ-0000018-01	Window lifter for BMW 5	Con	Jan 26,	Tony	Feb 5,
Originated	RFQ-0000019-01	Engine start stop and HV	Con	Jan 26,	Tony	Feb 5,
Originateu	OR RFQ-0000020-01	Ford B-Max glove box swi	Con	Jan 26,	Tony	Feb 5,
Modified	RFQ-0000021-01	test new rfq	RFQ	Feb 17,	Kevi	Feb 1
Description	OR RFQ-0000022-01	test folders	RFQ	Mar 18,	Kevi	Mar 2
Comment	RFQ-000026-01	аа	RFQ	Mar 18,	Kevi	Mar 2 🗸
LABEL V	< >>	٢				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).

🗌 Name	Туре	Ð	State	Duration/Effort (Hour	Cost
🖃 🗌 😰 Lab Testing and Equipmen	Task	0	Assign	56)
🖃 🔶 📄 🗭 Misc. Cost MTL	Task	0	Assign	0	100 euro
🖃 🗕 🗋 🗭 Lab Testing and Deve	Task	0	Assign	56)
🖃 🕂 🔲 💆 D-FMEA support	Task	0	Assign	12	
🖃 🔶 🔲 🕅 Analysis	Task	0	Assign	24	
🖃 🔶 🔲 😰 D-Reviews Engineerii	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)

Close	Load Estimation
🗌 Name	
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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 u	sing a Tas	sk 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.

 Collaboration and Approvals 	Tasks Approval Tasks Pro	jects Issues	Approval Issues	My Calendar	
Home Change Management User	Tasks Filter:Assigned Tasks	. 🛛 🏹 🔇			
Home Project Lead				a	
Home Project User		Slip Days 🗐	찔	State % Complete	Project Est
Home		42 0	0	Active 50	PLM Impl Jui
Issues Summary	Analysis	0 0	0	Active 50	PLM Impl Ma
Shortcuts	RFQ CBOM EBOM MBOM E	0 0	0	Active 50	PLM Impl Ma
Collections	Round	0 0	0	Active 50	PLM Impl Ma
Tasks	Live Workshop	0 0	0	Active 50	🔄 🎽 PLM Impl Ma
Subscriptions	Use Cases Approval	0 0	0	Active 50	PLM Impl Ma
Meetings	Round	0 0	0	Active	PIM Impl Ma
My Calendar			•		
Decisions		0 0	0	Assign	RFQ000004-01 De
Discussions		0 0	0	Active so	PLM Impl Ma
	ProdInstallation	0 0	0	Assign	PLM Impl Jai
	Proiect Management	0 0	n	Activo	PIM Impl Mr
Step 2 Select ic	con or dedicated command, to	upload deliv	verables		
Timing Plan	Close Load	l Estimation	Actions -	Edit - Type	
Assignees					
Issues			Turne	Id Deserved	

Issues	Name	Туре	ld 🔺	Dependency	Ð
Collaboration	🖃 🗖 🕅 Timing Pla	an Task		2:FS+0.0 d	0
Deliverables				(
Dependencies					
Efforts					
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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).

Checkin Files		
*-		
File Format	Comments	Î
Browse_ PDS_3DS_MEM_MasterPlan_4_2007_20150306.mpp generic v		
Browse_ No file selected.		
Browse_ No file selected.		
Browse_ No file selected.		~
	Done Cance	el

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

Create New Document function is executed in two steps:

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

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Step 1 of 2:Specify	Details
**	
Fields in red italics are required	
Name	✓ AutoName
Туре	Document
Policy	Document Release V
Title	
Description	
Access Type	Inherited 🗸
Document Type	✓
	Next Cancel

b) Upload files (select command Browse)

E

Step 2 of 2: Upload Files		
**		
File Format	Comments	Î
Browse No file selected.		
Browse No file selected.		ł
Browse No file selected.		
Browse No file selected.		~
	Previous Done Cance	el

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Step 4 Complete or update description

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

Deliverables		
Actions 🗸 🔲 🗸 🔀 🗸 🖓 🖓		
🗌 🔒 🖷 Name 🛆 Title Rev Ve	r Type Actions	Description State
□ 0/1 DOC-0000137 LM_RSA_970000_ICP.mpp 0 1	Document 🔊 🛓 🕃 🗔	In Work 🗔

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

	DOC-0000137	State : Private + In Wo	rk	➔ Frozen			
	Document (0)	Modified : 12/1/2015 11:13	:48 Al	M			
	LM_RSA_970000_ICP.mpp	≡ - <u>%</u> -					
	Files	✓ Edit Details		-0000137			
	File Versions	📥 Download					
	Approvals	🗟 Checkout		ment			
	Revisions	🗔 Upload/Check In		vice Produ	uction		
	Issues	Subscribe		RSA_9700	00_10	CP.mpp	
	Routes	× Delete This Version		ork			
	Discussions	Push Subscription		ph Zammi	t		
	Retention Schedules	×≣ Delete All Versions		1, 2015			
ľ	Lifecycle	Modified	Dec	: 1, 2015			
	Multiple Ownership Access	Policy	Doc	ument Rel	ease		
	History	Access Type	Inhe	erited			
	nistory	Document Type					
	Where Used	Classification Path(s)					
	Classification	📑 • 📰 • 🔜 🏹	, E	I 🔆 •			
	Referenced By	☐ File Name ▲				Ver	Origi
		LM_RSA_970000_ICP.	mpp			1	Dec

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Step 5 Complete Timing Plan task

Select the task, select command Close.

Close	Load Estimation
Name)
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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

 Collaboration and Approvals 	Tasks Approval Tasks	Pro	jects	Issues	Approval Issue	es My	Calendar		
Home Change Management User	Tasks Filter:Assigned Tasks	-	5	7 <table-cell></table-cell>	≣ % -				
Home Project User	Name	٨	Slip Days	: E	8	State	% Complete	Project	Est Start
Issues Summary	Tooling Budget		0	0	0	Assign		RFQ000005	Dec 10, 201
Shortcuts	Mould Resources		0	0	0	Assign		RFQ000004	Dec 11, 201
Collections									

Step 2 Select command Variants from RFQ package menu

RFQ000005-01	Add Products Add Variants	Create \	Variants) 🖉 📑 - 📰 -	- 🔜 📲 🖉 🤊
Folders		Rev	Туре	Description	Similar Parts St
Variants					
Sales Ontions	000000552	A	Sket	Switch Window lifter	P€
Estimated Volumes	000000553	A	Sket	Switch Color white	Cr
Lifecycle	000000554	A	Sket	Switch color black	Cr
Members					

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

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

000000552 A	* 🕈 🚣 🖉 🔒	🔁 - 📰 - 🔜 🏄 🤇	9 🗐 🕱	-		
Bill Of Materials	Name .	Description	Estimated Cost	Prototype Cost	Tool Type	Cvi
Access		Description	Lotinatou cost	Theorype cost	loor type	c),
Specs & Documents						
Related Parts						
Collaboration						
Multiple Ownership Access						
CMS Information						
IHS Information						
Tool Parts						
Referenced By						

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.

0000000552 Creat	e Tool Part		
🗟 🔆 -			
	Fields in red italics are required		
Туре	Tool Parts	Policy	Generic
AutoName Series	Tool Part Number 🖌	Number of Parts	1
			Done Cancel

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*

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

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Ado	l Existing							
Ê	· D -	🖉 🏹 🔮 🔆 -						
	10011						^	•
	10012							
	148000	additional handling frames (rfq3374-20)	Assembly Line	n/a	Audi/Methode	n/a		
	2982	painting jig	Production Tools	n/a	Ford	02982		
	2983	painting jig	Production Tools	n/a	Ford	02983		
	Name 🛆	Description	Tool Type	Number of Cavities	Customer Property	Project Code	Remarks	
	2995	button - 52695	Production Tools	2	Ford	02995		
	2996	button - 52980 + 81 + 82	Production Tools	3	Ford	02996		
			Production				~	1
.∢ P	age 1 🗸	of 52 🕨 🔳 🗉					Submit	

7

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

OK Cancel

Edit Details: user can enter or update tool information

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\star 💠 🔚 🗶 📑 - Mass Update	••• ••• ••• •• •• •• ••	7 () ☆•				(Save Reset
Name	Description	Usage Location	F/N	Estimated Cost	Prototype Cost	Tool Type	Cycle time (secs
🗌 👪 🔕 Temp-10031	cap	, Malta	1	100000	15000		~
🗌 🐻 🔕 Temp-10032	plunger	Malta	2	55000	-	Assembly	/ Line
						D and D	
						Lab Jigs	
						Productio	on Tools
						Prototype	e Tools
						Samples	for re sale

Step 4 (Components definition) Select command Summary Matrix Components

Table contains all components defined for all variants

RFQ000005-01	4	>	📑 - 📄 📲	7 Ⅲ ⅔ -			
Folders		Nam		Description	Switch Window lift	Switch Color white	Switch color black
Variants				Securit			
Sales Options			000000555	Index	Х	Х	Х
Estimated Volumes			000000556	Button	Х	х	Х
Lifecycle			000000557	PCB	Х	Х	Х
Members			000000558	Spring	Х	х	Х
Activities Estimation			B52106-05	HOUSING			Х
Assignment View			B52106-06	HOUSING			Х
Summary Matrix Components							

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

000000555 A Bill Of Materials	^	\star 🖶 🚘 🗶 🔔 - Mass Update		然 罵 7 []	- Reset
Access		Name .	Description	Estimated Cost	Prototype Cost
Specs & Documents				r	r
Related Parts		3370	housing	15000	
Collaboration					
Multiple Ownership Access					

Repeat this task for each component

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

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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

RFQ-000003-01	🗙 📑 🔊 🖍 🙏	× 職・ I () 7 () () () () () () () () (
Folders	Mass Update	Jass Update								
Variants	Namo	Description	Usage Location	Parts Connected	E/N	Estimated Cost	Prototype Cost	Tool Type	Cycle time Iser	
Estimated Volumes	name -	Pescipion	o sage cocation	rans connected	17/14	L'stimated Cost	r tototype cost	roor type	cycle tille (sec	
Lifeayde	3370	HOUSING - 800050	Malta	57039-02, 000		-	_	_	_	
Members	👪 🔕 Temp-10031	сар	Malta	00000394		100000	15000	Assemb	r	
Activities Estimation	Temp-10032	plunger	Malta	00000394		55000		Assemb	r	
Summary Matrix Components										
Tooling Cost Breakdown										

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).

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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, s	elect hyperlink	related to TFG	C or Modularity	checklists

 Collaboration and Approvals 	Tasks Approval Tasks	Proje	ects l	ssues /	Approval Issue	s My (Calendar	
Home Change	Tasks Filter:Assigned Tasks							
Management User	🖉 📮 🛄 🗸 🐻 🖬	-] 🛃 🖣	7 🔛 🛛	E 🔆 -			
Home Engineering User			011- D		0-	C+-+-	N/ C l-+-	Destat
Home Project User			Slip Days	휜	2	State	% Complete	Project
Home	Change in led colour	Ŷ	8	0	0	Review	100	2000166 Mig 20002000
Issues Summary	Tool design reviews		3	0	0	Review	100	Tool1
Shortcuts								
Collections	(TFC)	r	0	0	0	Review	100	RFQ000001-01
Tasks	Tweaking of resistance	Ŷ	0	0	0	Review	100	20000166 Might Water State Sta
Subscriptions	BOM Concept		0	0	0	Assign		RFQ000005-01



TFC		
Assignees	Checklists Deliverables	
Issues		m- 📃 🛛 🏹 🗮 🗞-
Collaboration		
Dependencies	Name	Description A Yes/No
Properties	E TFC	
Risks	+ → 🗋 🗎 CH-0000002	RFQ PACKAGE CONSID
Routes & Approvals		TECHNICAL CONSIDERA
Images		
Activities Estimation		

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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.

TFC								
Assignees	Checklists	eliverables						
Issues			🔊 🖂 🖽 🖏	8-				
Collaboration				3				
Dependencies			1	I		1	1	Sa I
Properties	Name	Description 🔺	Yes/No	Response		Risk Mitigation	Rating Justification	Complete
Risks	🗏 🗌 🗭 TFC							
Routes & Approvals	Ē → 🗌 🗋 CH-	RFQ PACKAGE CONSID						
Images	Ē → 🗌 🔞 (^r Are the drawings and asso	Yes	5	5	٢	٢	
Activities Estimation	Ē → 🗌 🗞 (Are the resources availabl	Yes	5	5	٣	,	
Multiple Ownership Access	Ē → 🗌 🖄 (Have program milestones	Yes	5	5	r	٢	
	r → 🗌 🗞 (" Is product adequately defi	Yes	5 1 ^	5	٣	٢	
	r → 🗌 🔯 CH-	TECHNICAL CONSIDERA		2				
	r 🗕 🗕 🗋 🤇	Business Processes And		4				
	r → □ (:	Are any specific concessi	Yes	5	5	٢	٢	
	- → □ [Are specified field and/or p…	Yes	4	4	r	7	
	1	1						

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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 co	mpleted.	
Constraints			

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

 Collaboration and Approvals 	Tasks Approval Tasks	Proj	ects	ssues	Approval Issue	es My	Calendar		
Home Change Management User	Tasks Filter:Assigned Tasks	-	5 🔊	7 😪 1	≣ % -				
Home Engineering User	Nama		Slip Dow			State	% Complete	Drojost	
Home Project User			Shp Days	빈	2	State	% complete	Floject	
Home	Change in led colour	Ŷ	8	0	0	Review	100	2000166 Mig CN	1
Issues Summary	Tool design reviews	\mathbf{A}	3	0	0	Review	100	Tool1	0
Shortcuts			-						
Collections		Ŷ	0	0	0	Review	100	RFQ000001-01	1
Tasks	Tweaking of resistance	1	0	0	0	Review	100	CN 0000166	[
Subscriptions	EL BOM Concept		0	0	0	Accian		PE000005.01	r
Meetings	ET BOW Concept		U	0	U	Assign			
My Calendar	BOM Concept		0	0	0	Review	50	RFQ000004-01	C
Decisions	Lab Testing and Equipment		0	0	0	Assign		RFQ000004-01	[
Discussions	Modification of PCB size/desig		0	0	0	Assign		2000166 Michael Contract Contr	[
			~	~	~		· · · · · · · · · · · · · · · · · · ·		

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).

	BOM Concept	Close Load Estimation Actions - Edit - Type				
	Assignees					
	Issues	✓ Name	Туре	ld 🔺	Dependency	
	Collaboration	BOM Concept	Task		1	
	Deliverables					
1	Dependencies					

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