ENOVIA Collaboration and Approvals Essentials

3DEXPERIENCE R2017x

3DEXPERIENCE®

About this course

Course objectives

Upon completion of this course you will be able to:

- Illustrate the structure of ENOVIA Business Process Services
- Create and manage your folders
- Create workflows
- Identify and manage your assigned tasks
- Subscribe to various objects and events
- Report and resolve issues in objects
- Create, track and organize your documents

Target audience

3DEXPERIENCE platform Users

Prerequisites

Students attending this course should have completed the Gateway to the 3DEXPERIENCE Platform course.

8 hours

Environment Requirements

Based on a combination of videos, theory and simulations, this course can be taken in self-paced learning mode. It is self-sufficient.

If you want to practice, you will find a master project at the end of the course. In order to play it, you must have access to a software installation and an environment that includes:

- The **3D**EXPERIENCE R2017x platform

- An **Environment Setup Package** (previously called "data package") containing specific data files needed to run the exercises and set your own environment. This Environment Setup Package is available in Companion Learning Space. It must be imported onto the server by either a system administrator and/or an instructor.

Warning:

- This course does not contain any **3D**EXPERIENCE installation file.
- **Environment Setup Packages** are not usable when using a Cloud environment.

For complete information about the course environment, please refer to the detailed step document.

If you have any questions on how to access your environment, please contact your assigned support team. You may also contact your education provider using the information on the **Contact Us** page on **Companion Learning Space (Help > Contact Us** menu**)**.

Conventions Used in the Course (1/3)

The following typographic conventions are used in this course:

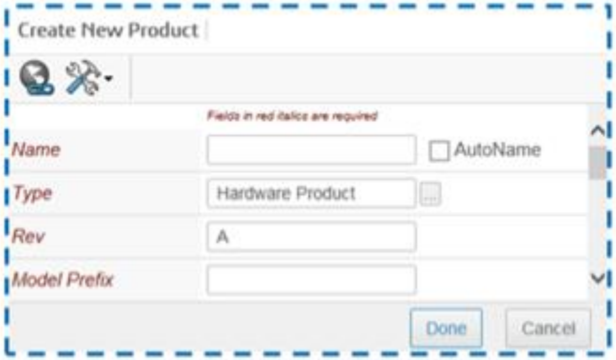
- **Bold text** within a sentence denotes the name of a tool, icon, window, dialog box, button or option.
- *Italic text* within a sentence is used to denote the name of a tree item or a data file, or to apply emphasis on a key word.
- Numerical lists are used in sequential lists, such as the steps of an exercise procedure.
- Lower-case alphabetical sub-lists are typically used in the sub-steps of an exercise procedure.
- Text enclosed in these < > brackets represents the name of the keyboard key that must be pressed.
- Text enclosed in these [ ] brackets corresponds to the text that must be typed into the text field of a dialog box or prompt.

Example:

Use the following steps to create a new product in ENOVIA:

1. In the top bar, select **Add > Product Line > Create Product….**

2. Create a new product.
   a. Select the **AutoName** check box.



   b. Type [New] as the **Model Prefix**.

   c. Click **Done**.

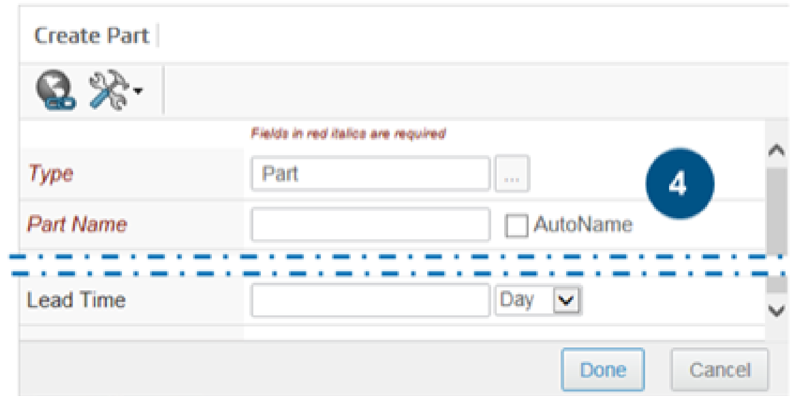
3. Press <Ctrl> + <S> to save the document.

Conventions Used in the Course (2/3)

- 1 identifies an area or a group of objects in an image that is associated with an instruction in a sequential list or an exercise procedure.
- A identifies a specific entity in an image that is associated with the corresponding text in a sequential list or an exercise procedure.
- Upper-case alphabetical lists are used for items that are non-sequential, such as options or definitions.
- at the top right corner of a slide indicates that the slide contains animations. Click anywhere in the contents area of the slide to view the animations.

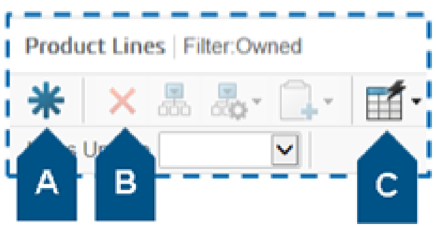
Examples:

4. Select the options as shown and click **OK.**



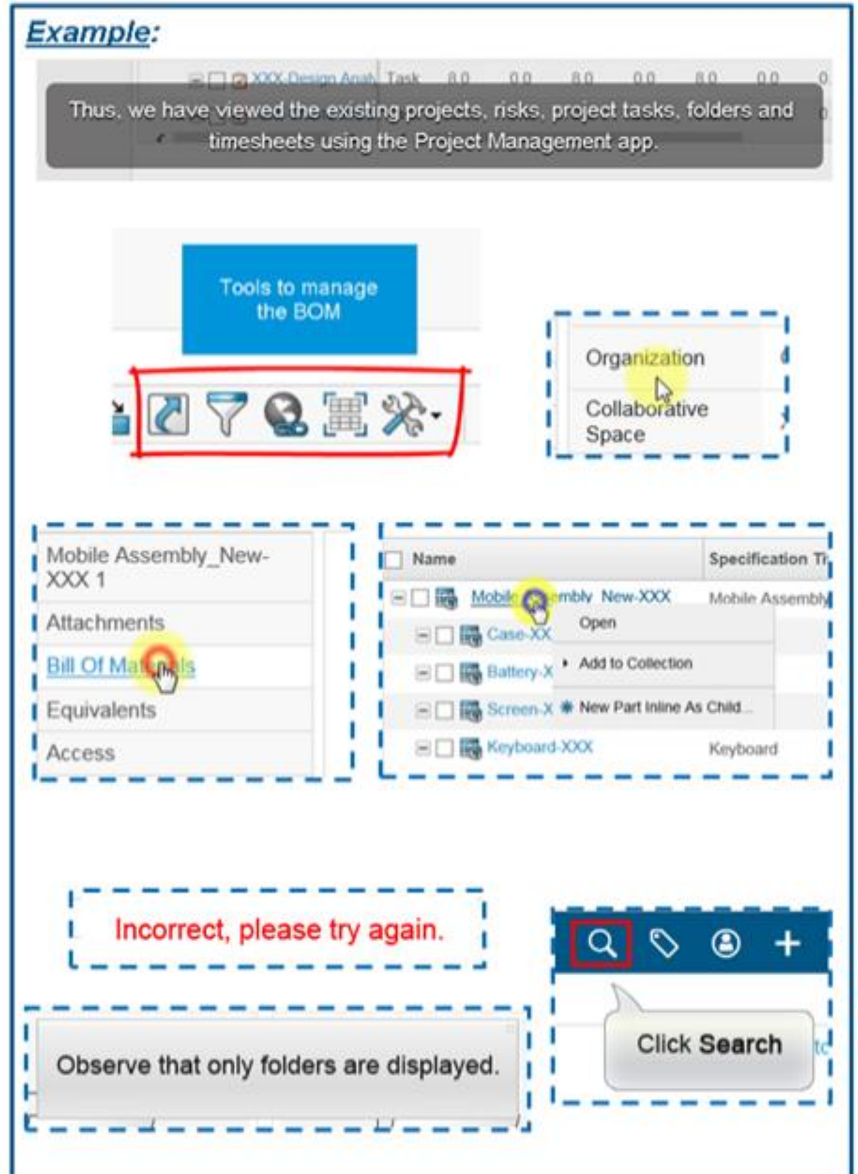
You perform the following operations:

A. Create
B. Delete
C. Customize



Conventions Used in the Course (3/3)

- All videos have accompanying text:
  - Closed captions for generic and procedural information.
  - Callouts to introduce user interface (UI) elements.
- The videos display the following cursor effects:
  - Pointer movement: Yellow halo
  - Left-click: Red ring
  - Right-click: Blue ring
- All simulations have accompanying text:
  - A gray rectangular box displays information about the action.
  - A beaked gray box displays the actual instruction to be performed.
  - A message with red color text indicates an error in the actions performed.

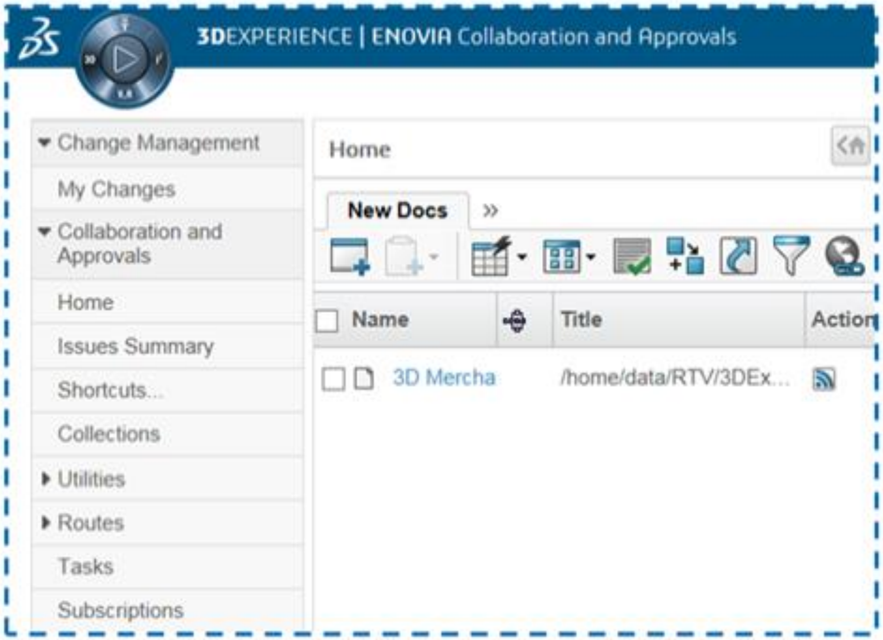


ENOVIA Collaboration and Approvals Essentials

Topics Covered:

- Getting Started with the Collaboration and Approvals App
- Managing the Workspaces
- Working with Routes
- Managing the Assigned Tasks
- Working with Subscriptions
- Managing Issues
- Working with the Common Document Model
- Master Project: ENOVIA Collaboration and Approvals Essentials
- Appendix
- Assessment

Getting Started with the ENOVIA Collaboration and Approvals App

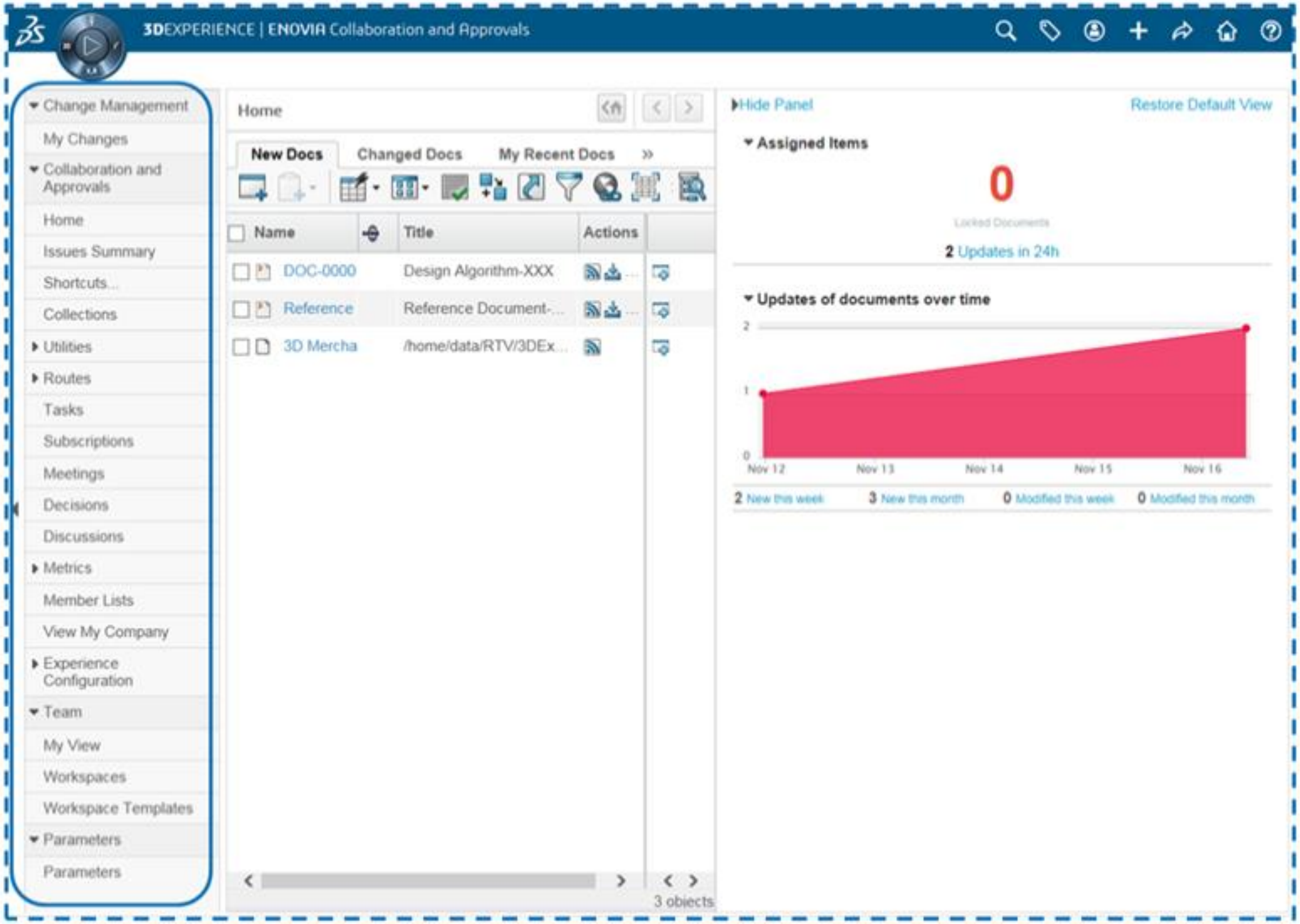


Here are the topics to be covered:

1. **Getting Started with the ENOVIA Collaboration and Approvals App**
2. Managing the Workspaces
3. Working with Routes
4. Managing the Assigned Tasks
5. Working with Subscriptions
6. Managing Issues
7. Working with the Common Document Model

Introduction to the Collaboration and Approvals Menu

The **Collaboration and Approvals** menu consolidates the features of Business Process Services (BPS), which helps you to interact with the user interface and objects for all the apps. You can use this menu to collaborate with other members while maintaining access controls to the content.



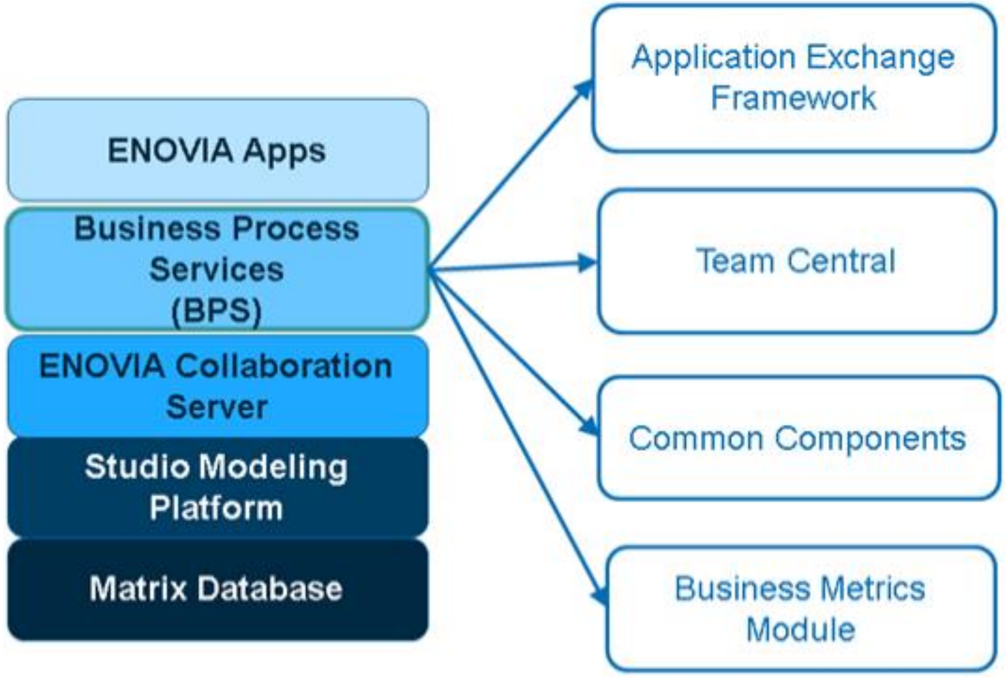
Defining Business Process Services

Business Process Services is an application that provides configurable user interface and schema for all the apps. The BPS creates a framework for the apps allowing internal and external users (such as suppliers) to collaborate while maintaining access controls to content. It also provides a metrics reporting capability to assess the performances based on the product content.

Business Process Services include:

- Programs such as triggers, to execute user tasks and business process logic
- Schema such as routes, discussions and document management, used in multiple apps
- Java Server Pages needed to construct the user interface shared by all the apps

The BPS supports all **3D**EXPERIENCE platform apps, and it must be installed before you install any other app.

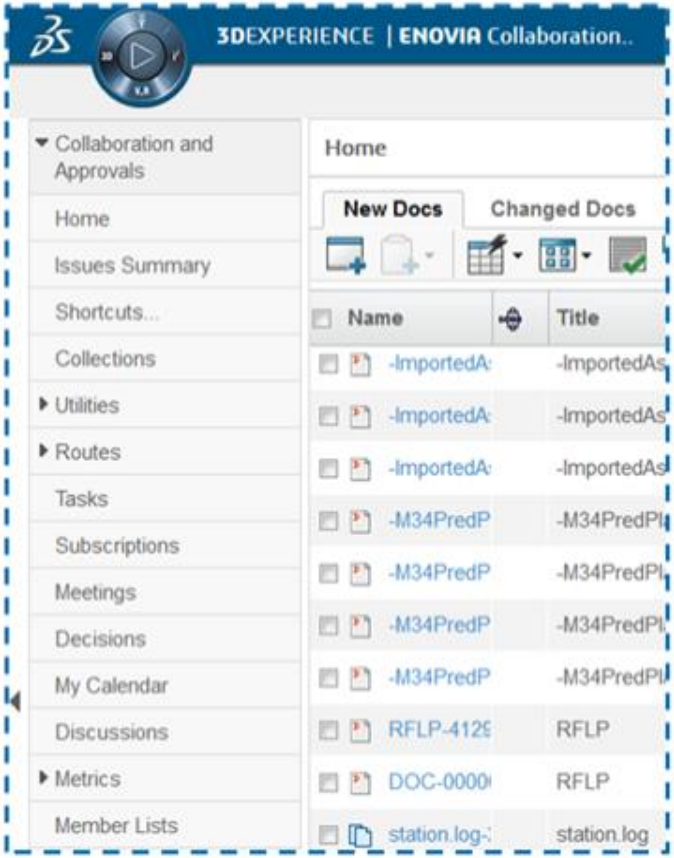


Schematic of the BPS

Collaboration and Approvals: Combining the BPS Components

The BPS consists of the following components:

- **Application Exchange Framework** (AEF) – It provides a configurable user interface and schema for the apps, such as:
  - Search pages
  - Collections
  - Background jobs
- **Common Components** – It provides the features used throughout the apps, such as:
  - Routes and tasks
  - Discussions
  - Subscriptions
  - Issue Management
  - Document Management
- **Team Central** – It provides a secure and structured virtual workplace that enables collaboration among team members located at different geographies.
- **Business Metrics Module** – It generates metric reports based on your business processes.

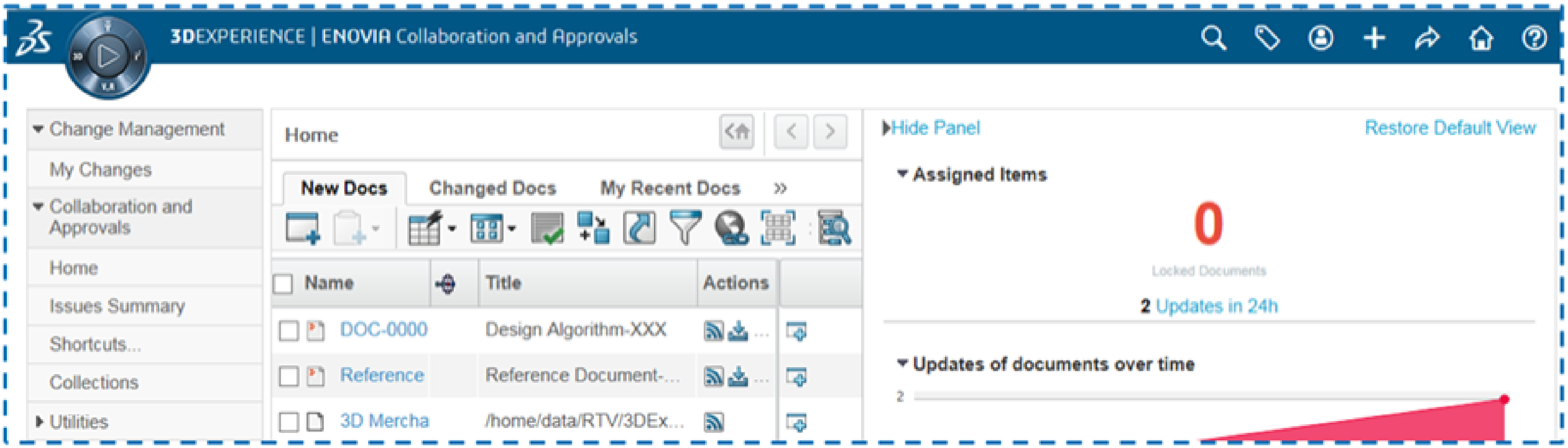


BPS: Application Exchange Framework

The Application Exchange Framework provides configurable user interface, schema and features that are used throughout the apps.

The menus and commands specific to AEF are:

- Top Bar
  - **Me** menu
  - **Help** menu
- Collaboration and Approvals menu
  - **Utilities** menu



Menus and commands specific to the AEF

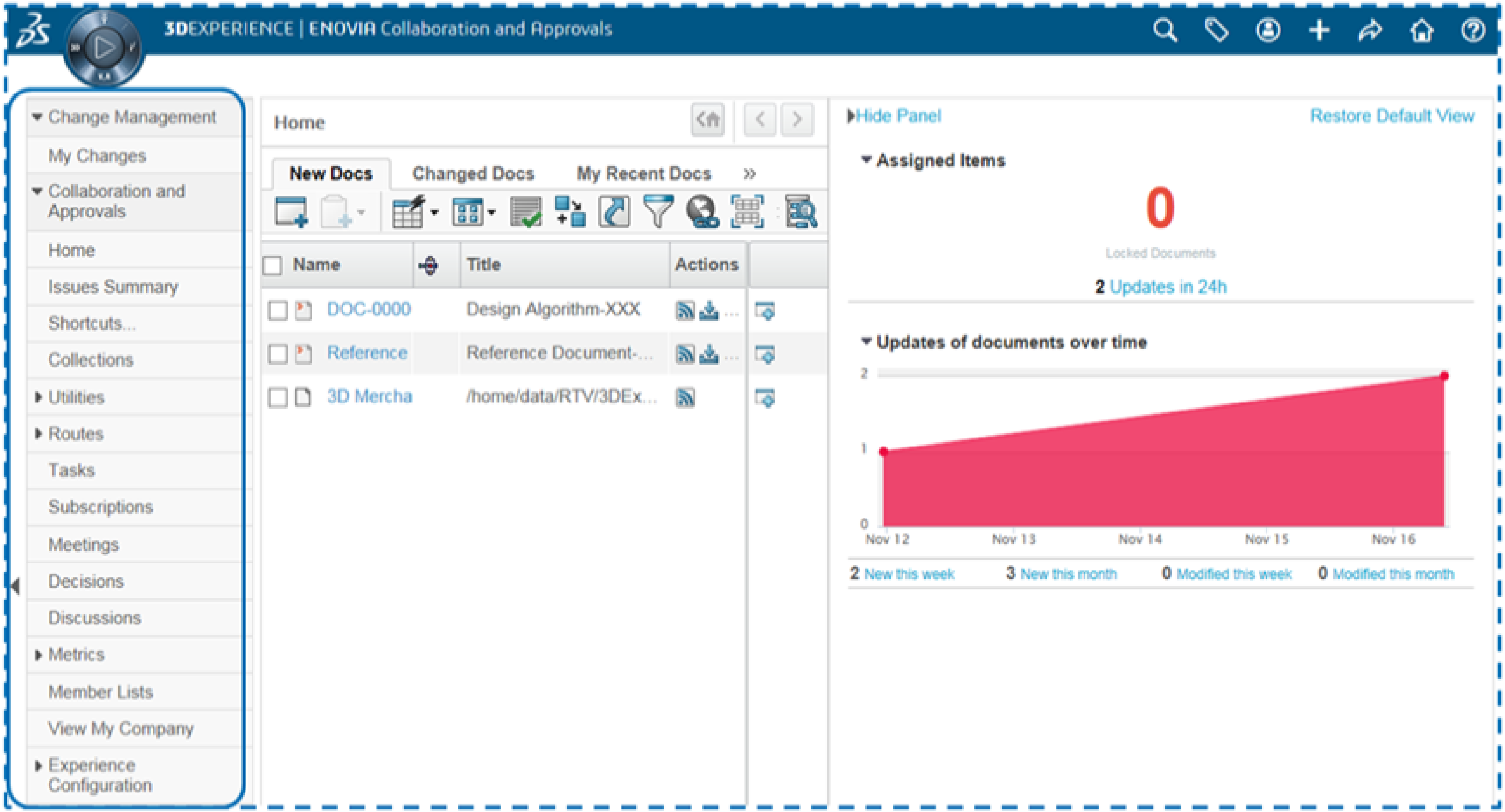
Note:
In this course, we will focus only on the Collaboration and Approvals menu.
The other top bar menus have been discussed in the Gateway to **3D**EXPERIENCE Platform course.

BPS: Common Components

The Common Components provide features that are used throughout the apps, such as *meetings*, *routes*, *discussions*, *document* management and company profiles.

The menus and commands specific to Common Components are:

- **Collaboration and Approvals** menu
- **Add** menu

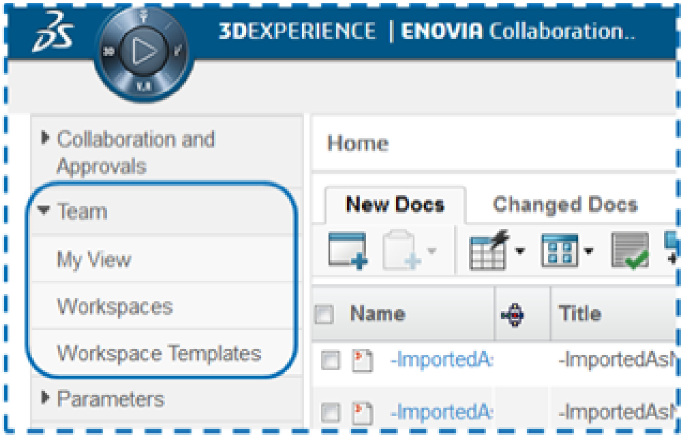


Menus and commands specific to the Common Components

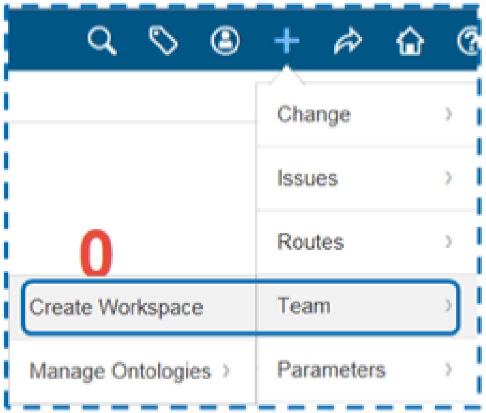
BPS: Team Central

Team Central helps you to collaborate with other members, both inside and outside your company.
The menus and commands specific to Team Central are:

- **Collaboration and Approvals** menu
  - **Team**



- **Add** menu
  - **Team > Create Workspace**



Menu and commands specific to Team Central

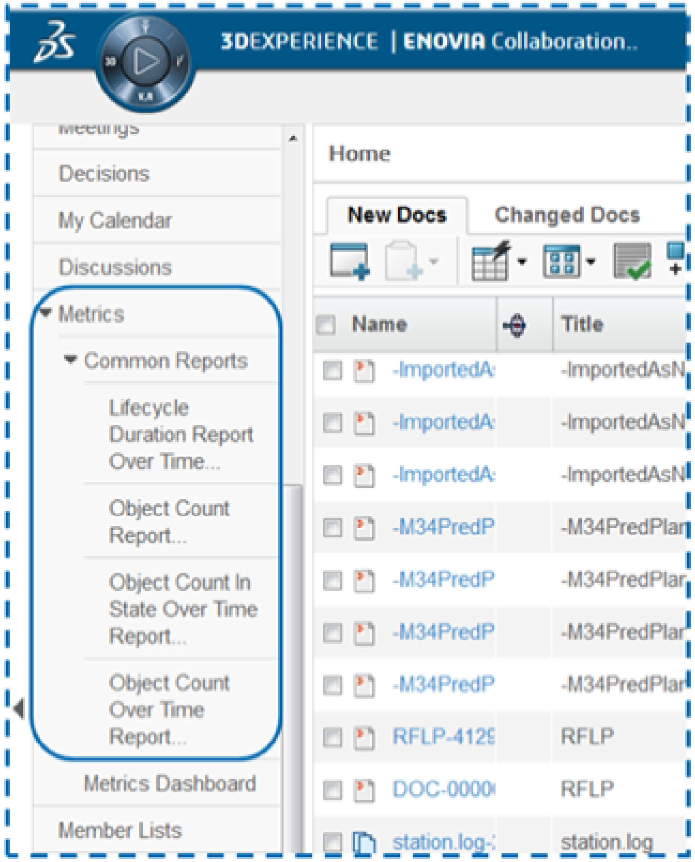
BPS: Business Metrics Module

The Business Metrics module enables you to create reports for assessing the performance of your organization.

You can create the following types of reports:

- Reports based on activities in given time periods that determine the overall performance.
  You can select the formats from several text or graphic alternatives, and set up dashboards to configure and group other reports.

- Reports based on selected time periods, such as weeks, months, quarters or years.



Menu and commands specific to Business Metrics

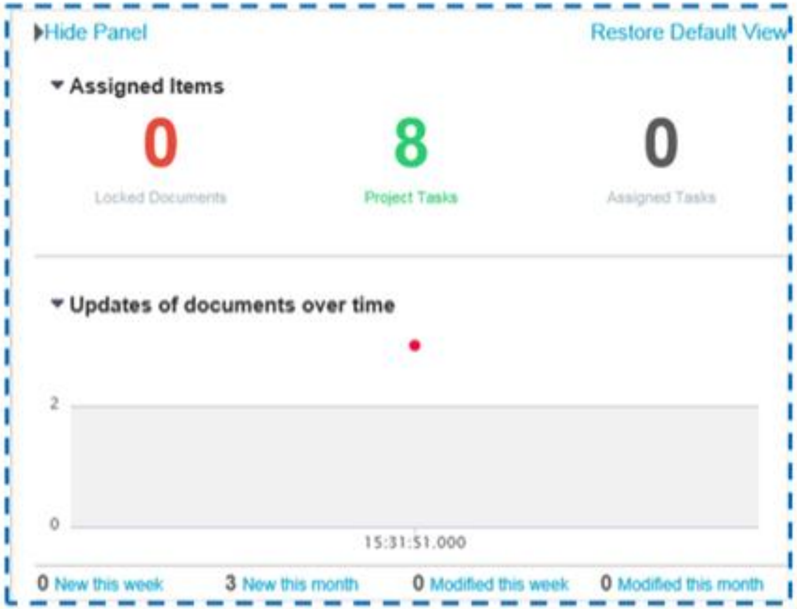
About Home Page (1/2)

The charts on the right side of the home page displays information about the in-process items. To use the charts, you can:

- Click **Hide Panel** or **Restore Default View** to hide or show the panel.
- Hover the mouse over the parts of a chart to view the details about that item.
- Click a counter, date period, or data in a chart to update the list to show items matching that counter or attribute.

Assigned Items:
This section displays the number of items that requires user action. It includes information about the number of **Locked Documents**, **Project Tasks**, **Issues**, **Changes** and **Assigned Tasks**.

Updates of documents over time:
This section displays the number of new and modified documents for the current week and month.

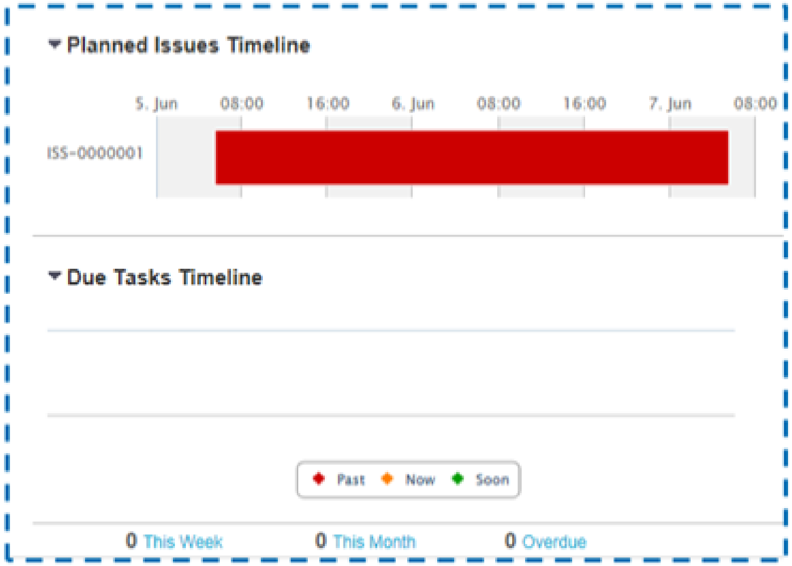


About Home Page (2/2)

Planned Issues Timeline:
This section displays the in-process issues assigned to the user shown on a timeline.

Assigned Changes Pending:
This section displays the engineering changes assigned to the user depicted by status and severity.

Due Tasks Timeline:
This section displays the **Route** tasks assigned to the user which indicates the task's status (late, on-time, or not due). Click an item in the cart to open the route properties page.



Introduction to the Course Scenario

This is a process-based course; here you will learn how to use the **ENOVIA Collaboration and Approvals** app, while you replay a scenario. The scenario is split into small steps forming the lessons of this course. Each lesson is followed by a practice exercise that enables you to complete one step of the scenario. The objectives of each step will be mentioned in advance, which will help you to complete the scenario and understand the processes supported by the app.

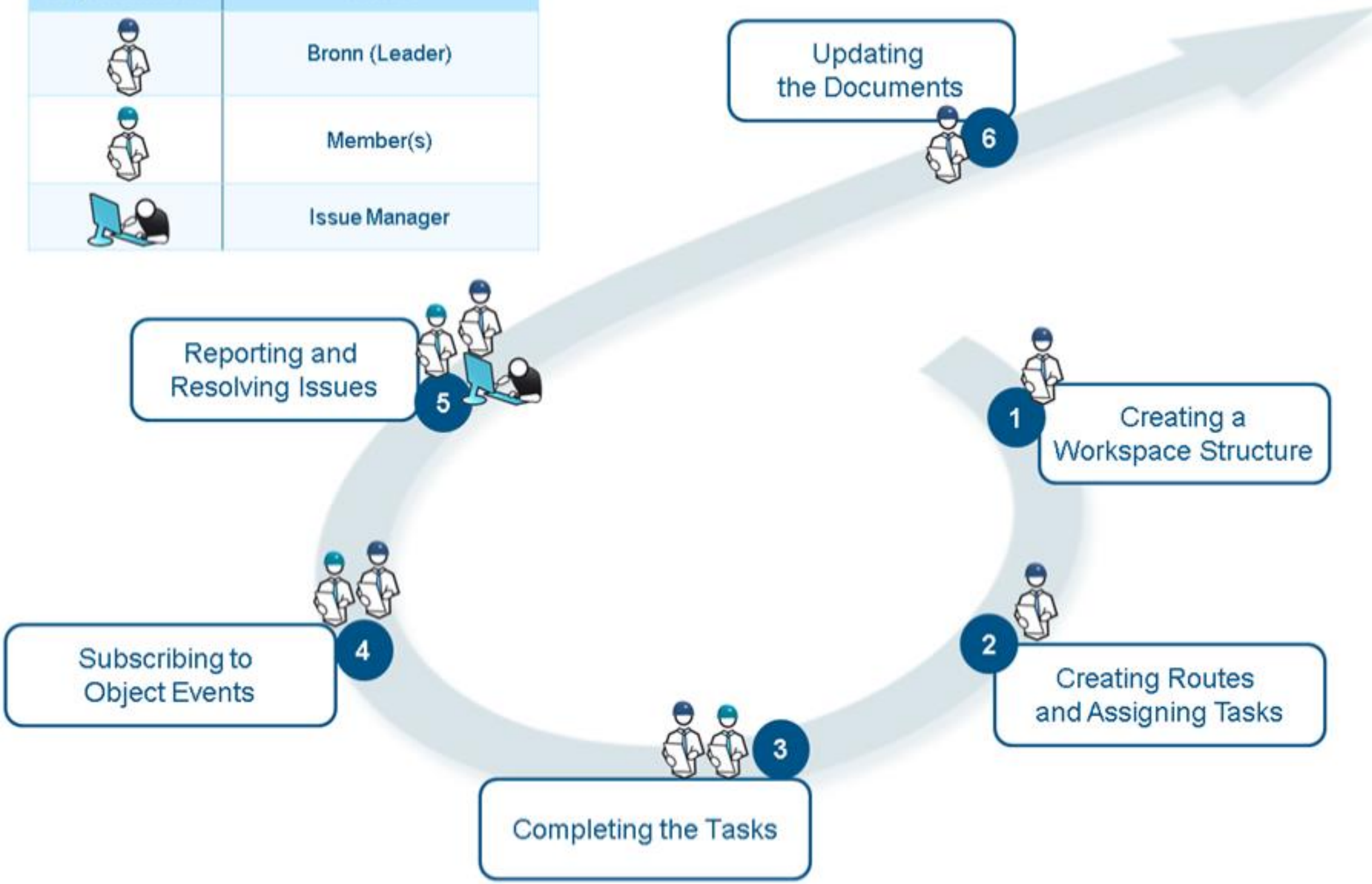
The Scenario

Accidents due to roof fall in underground mines has been a major concern for the coal mining industries. Our company, CoalMiners Co. is taking various initiatives, and *Mine Planning* has come out to be a solution to combat this problem.

Bronn Glover, a Surveyor, will be working with his team in this direction. He will start by creating a designated folder structure to maintain a record of all the surveys (of land or land features). He will add the team members to the folders, so that all of them can access and share the information, while maintaining the data security. To streamline the processes, Bronn will create workflows. The members will work on their tasks and interact with each other through various meetings and discussions. They can also report the ad-hoc problems in their workflow, and track them using various notifications. While all the members work on their tasks, Bronn will ensure that all the documents are in place and updated, before he takes his planning to the next level.

Solution Process

Representation	Profile
	Bronn (Leader)
	Member(s)
	Issue Manager



Mapping the App Terms with the Course Scenario

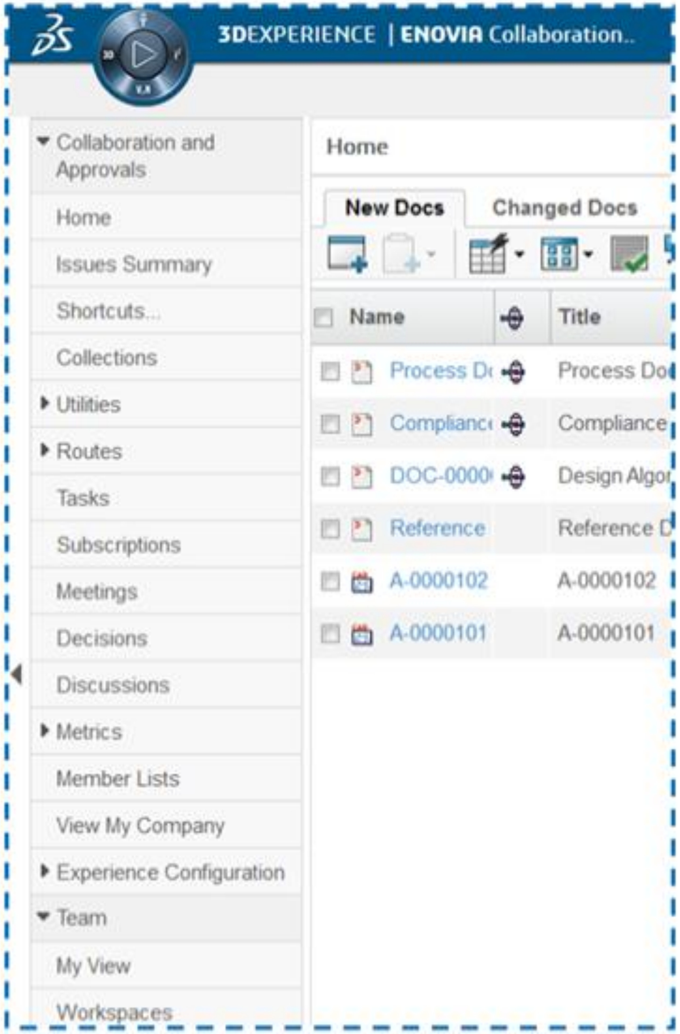
This table will help you to map the terminology of the **ENOVIA Collaboration and Approvals** app with the explanations in the course scenario.

App Term	Explanation as in the Course Scenario
Workspace	Designated folder structure, to which all the members can be added. They can collaborate and share various information while maintaining the data security.
Routes	Workflows to streamline the processes
Subscriptions	Notifications for updates on various objects
Issues	Ad-hoc problems in the workflow
Check In / Check Out / Revision / Versioning	Updating the documents

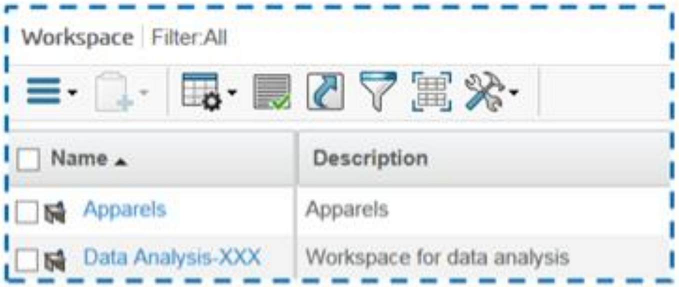
Summary

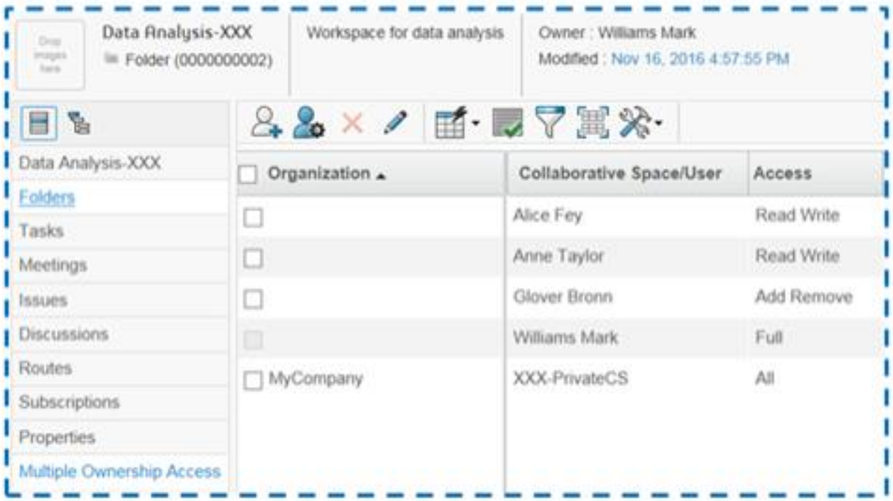
Getting Started with the Collaboration and Approvals App

- The **Collaboration and Approvals** menu consolidates the features of Business Process Services (BPS), which helps you to interact with the user interface and objects for all the apps.
- BPS consists of:
  - **Application Exchange Framework** (AEF)
    - Collections
    - Background jobs
  - **Common Components**
    - Routes and tasks
    - Discussions
    - Subscriptions
    - Issue Management
  - **Team Central** – It provides a secure and structured virtual workplace that enables collaboration among team members located at different geographies.
  - **Business Metrics Module** – It generates metric reports based on your business processes.



Managing the Workspaces





Here are the topics to be covered:

1. *Getting Started with the ENOVIA Collaboration and Approvals App*
2. **Managing the Workspaces**
3. Working with Routes
4. Managing the Assigned Tasks
5. Working with Subscriptions
6. Managing Issues
7. Working with the Common Document Model

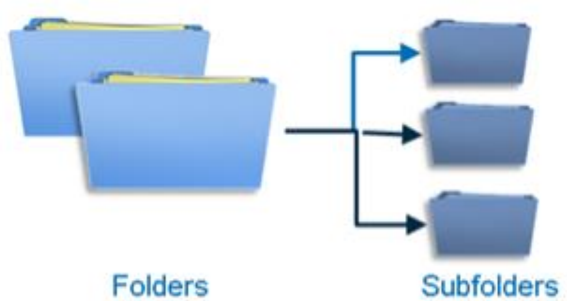
About Workspaces (1/3)

A workspace is a collection of folders and documents that helps you manage the information required to accomplish your business needs. You can assign members for a workspace, who can access its content. The workspace members can collaborate and share information by participating in meetings and discussions, while working on their tasks.

When you create a workspace, you must define its structure by adding the folders and subfolders to it.

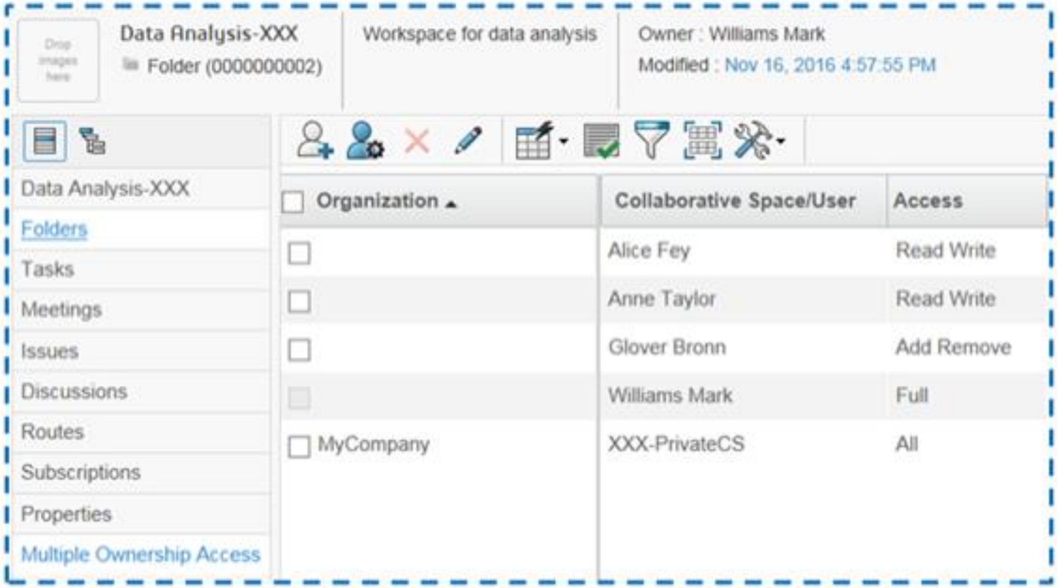
Folders and Sub-Folders

Folders contain documents for particular objects. You may also have predefined folders that can be added to every workspace. You can create custom subfolders within the folders. The workspace members with the appropriate access can view or work with the folder content.

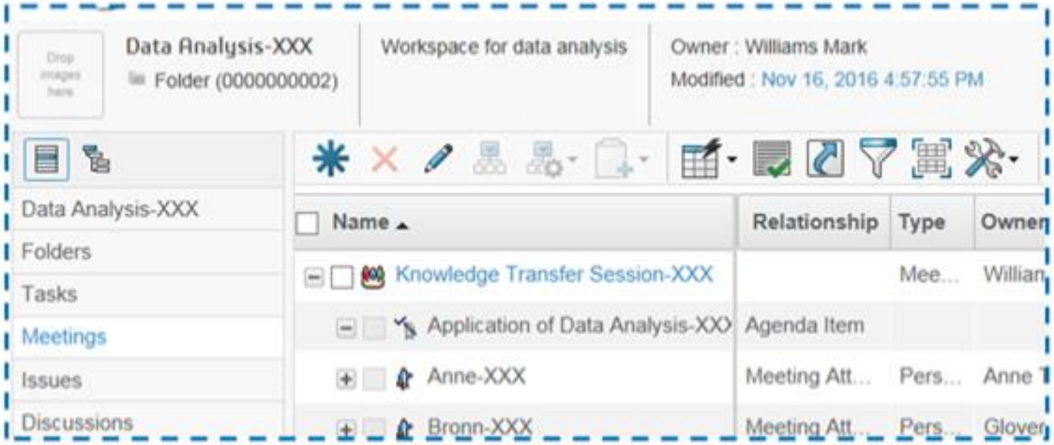


About Workspaces (2/3)

- **Members**
  You can add people from within your organization or any other organization your company collaborates with.
  You can also add a project, a security context or an organization to a workspace. You can designate certain members to be the workspace leads. Leads can add and remove people from the workspace and can assign workspace and default access privileges. They can also add and remove folders.

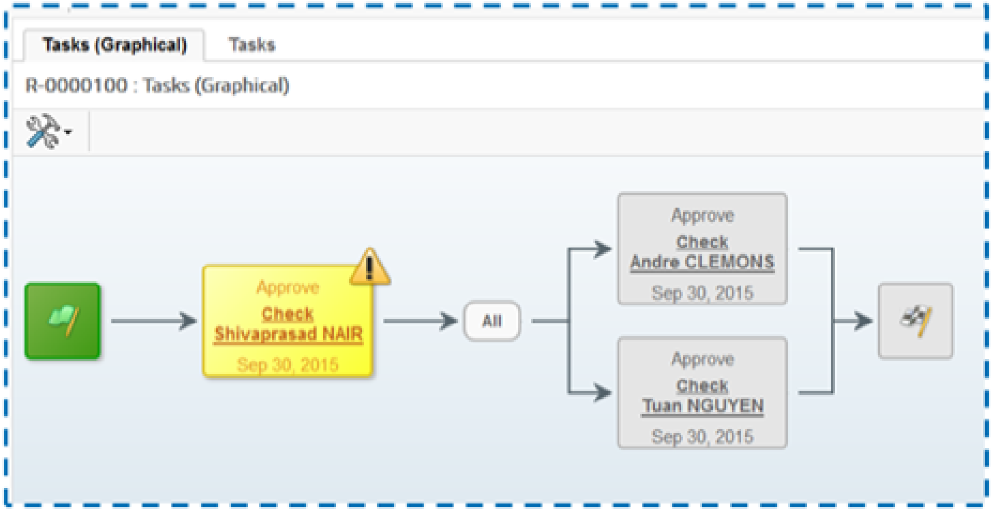


- **Meetings**
  Workspace members can create and manage meetings, including adding attachments, agenda items and attendees.



About Workspaces (3/3)

- **Routes**
  A route is a set of tasks that members of a workspace complete to accomplish a business activity.



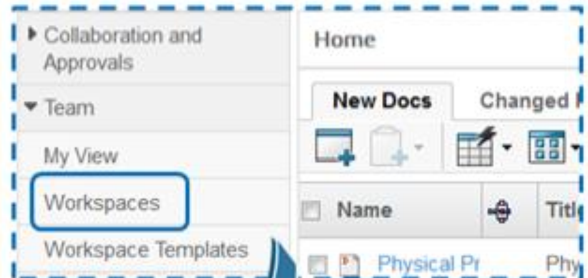
- **Subscriptions**
  Subscriptions enable you to be notified whenever a specific event is performed for a workspace or workspace component. You can subscribe for events like content created, added or modified.

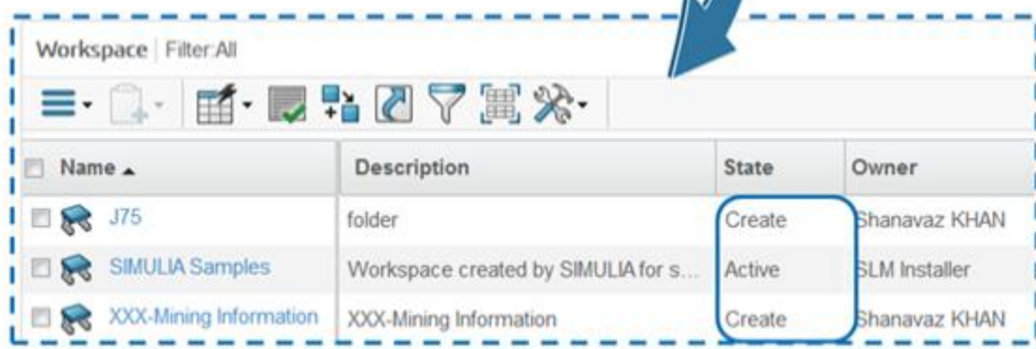
Listing the Workspaces

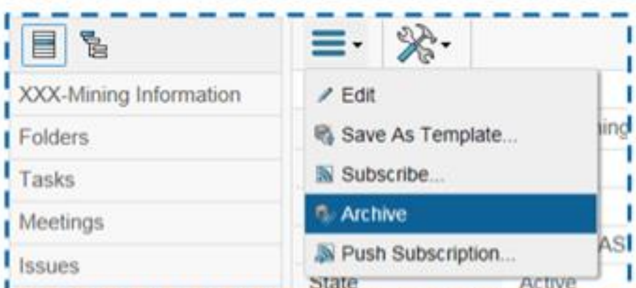
You can view the workspaces only if you own them or you are assigned as one of its members. In the **My Desk** menu, select **Team > Workspaces** to view the list of available workspaces.

The **State** column displays the lifecycle state of the workspace.

- When you create a workspace, it is in the **Create** state.
  - In this state, you can add folders and members, and assign accesses. Only the owner can access a workspace in its **Create** state.
- Before beginning your work, you have to promote it to the **Active** state.
  - All added members can access the workspace only when you promote it to the **Active** state.
- You can further promote it to the **Archive** state:
  - Archiving a workspace removes all members from the access list, so no one except the owner can access it.



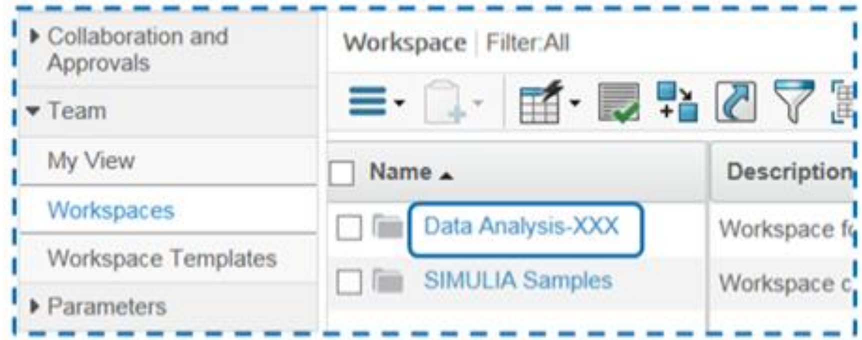


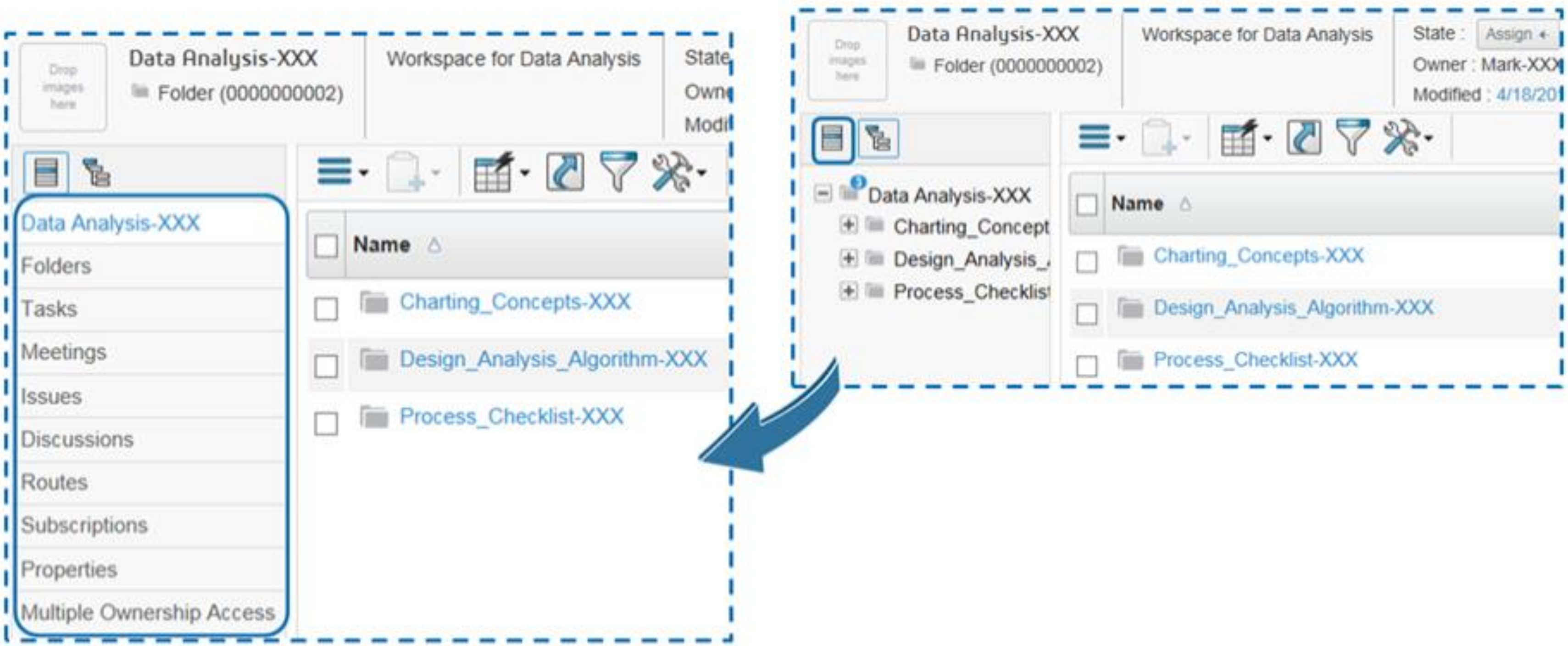


Viewing the Workspace Details

Click the workspace name to view its details. The structure tree shows the folder structure of the workspace.

Using the toggle button, you can view the categories related to the workspace.

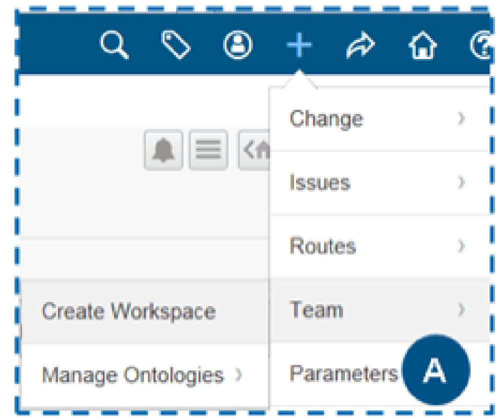




Creating Workspaces

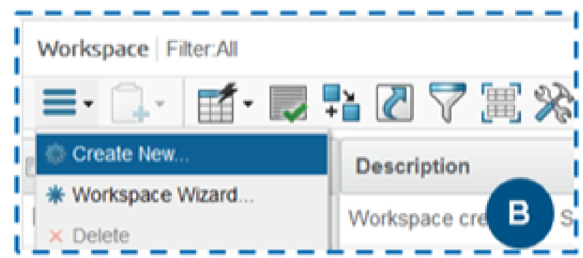
The person who creates a workspace becomes its owner. Owners can perform the following actions on the workspaces:

- Reassign the ownership to other members
- Assign folder accesses to the members
- Archive and reactivate the workspace, edit its properties and push subscriptions for it

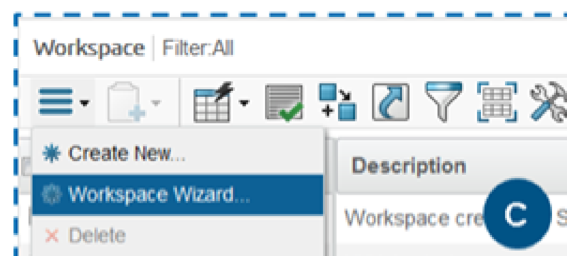


You can create workspaces using any of the three ways:

A. In the top bar, select **Add > Team > Create Workspace**.



B. In the **Workspace** page, select **Actions > Create New...**.

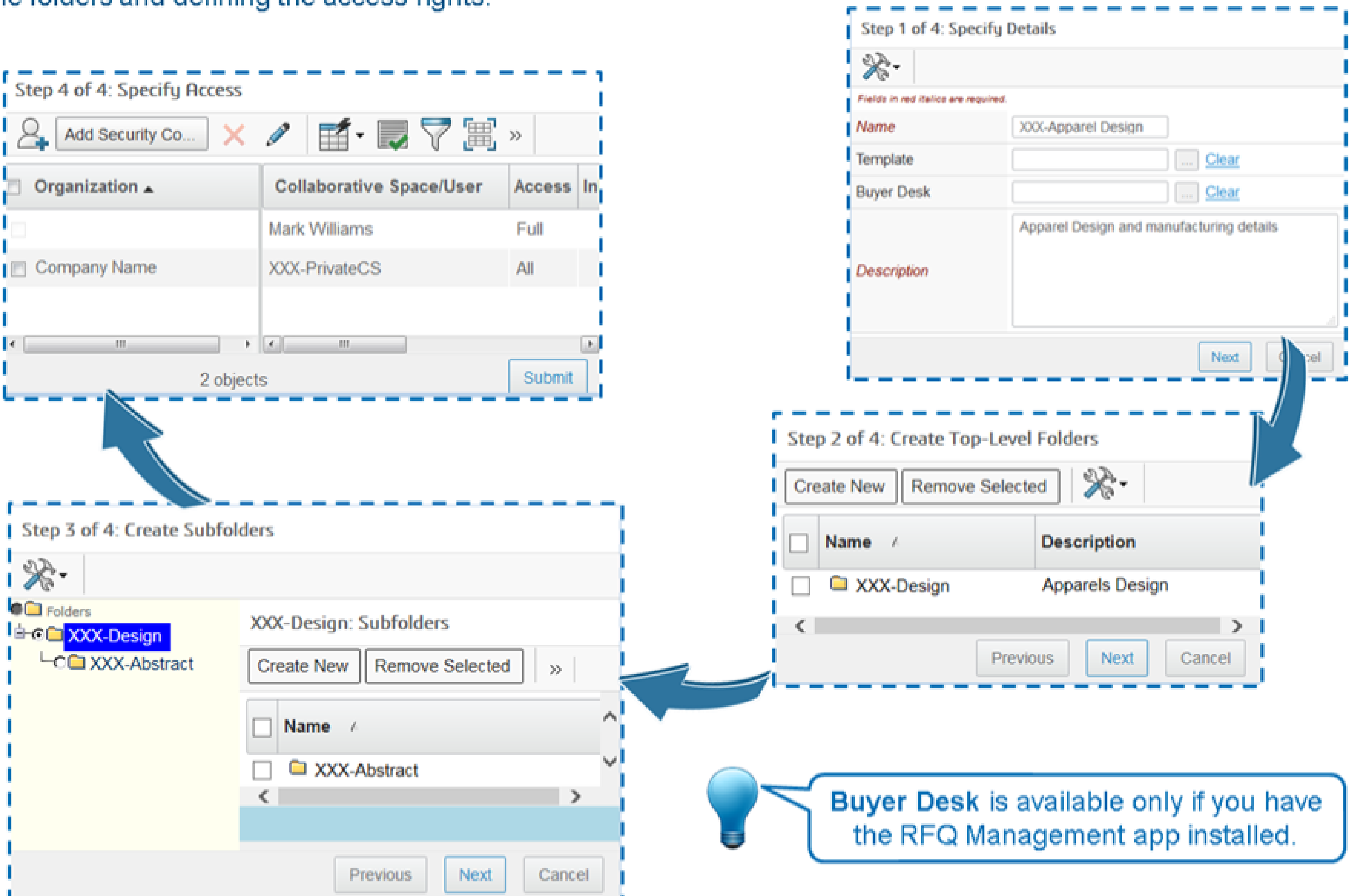


C. In the **Workspace** page, select **Actions > Workspace Wizard...**.

Creating workspaces using the wizard helps you to create all the workspace components at the same time.

Creating Workspaces Using the Wizard

You can use the wizard for specifying the basic information of the workspace, creating its folders, adding members to the folders and defining the access rights.

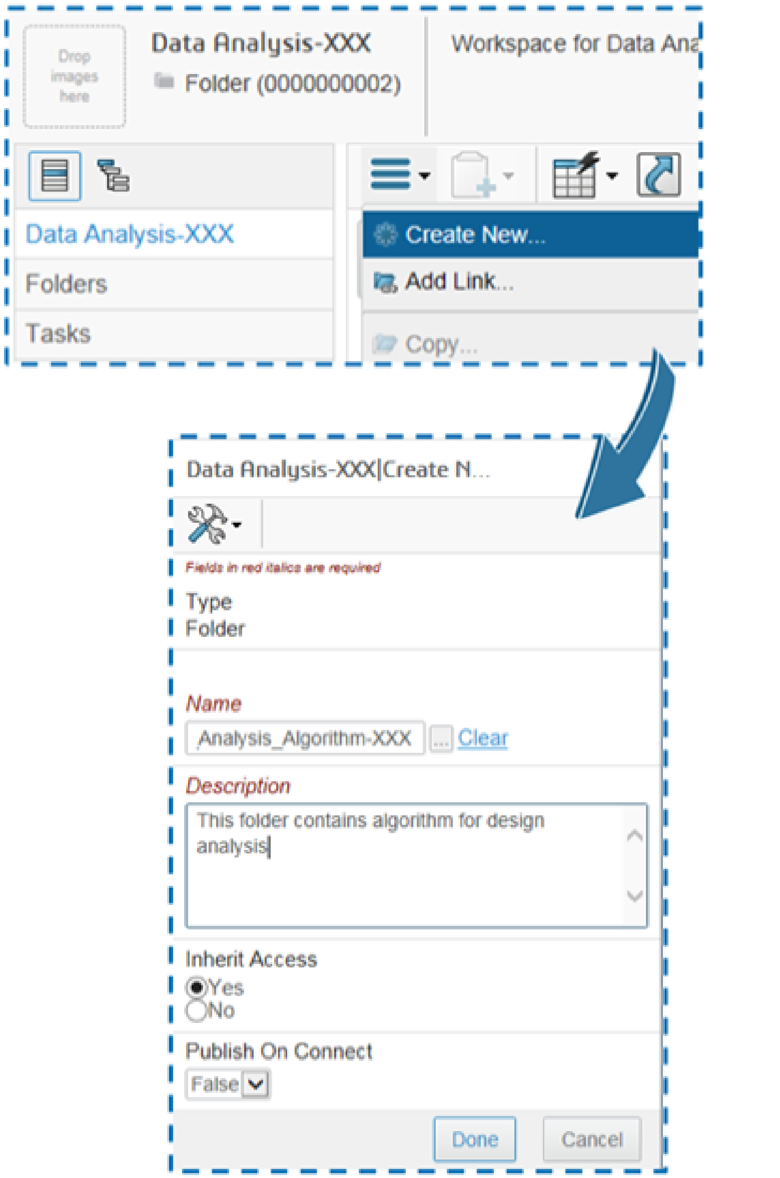


Buyer Desk is available only if you have the RFQ Management app installed.

Creating Folders

You can create new folders using the **Actions** menu on a workspace's **Folders** page. You can also create sub-folders within a folder to further group the documents.

If you want to derive the access rights of a folder from its workspace, select **Yes** for **Inherit Access**.



Benefits of Folders

Folders help you to:

- Control the access to project documents
- Lock a document that is checked out for editing
- Track the document revisions and versions
- Track each person who revises the file
- View the document history

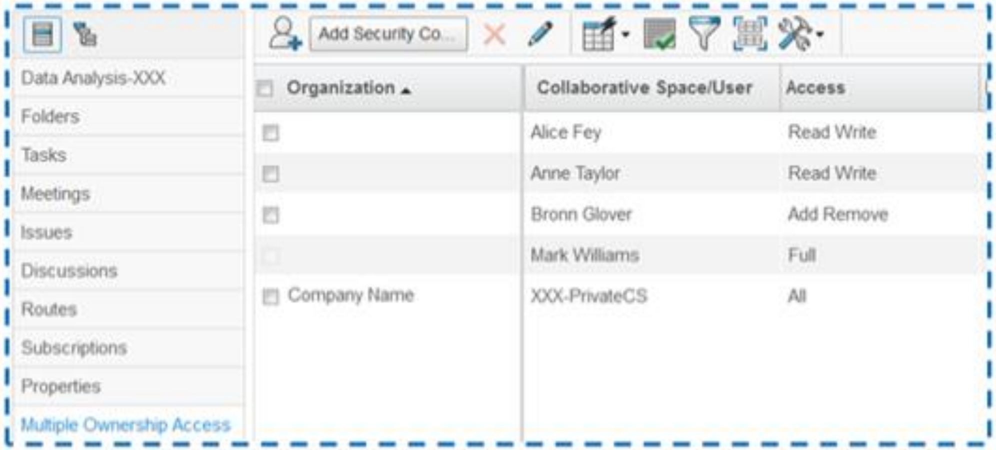
Defining Access Rights for Folders

You can use the **Multiple Ownership Access** page of folders to control the access rights for individual members. By default, the folders have an inherited access from the workspace. You can change the accesses using the **Enable Edit** icon.

You can grant the following access rights to members:

- **Basic**- When you add a new member to the folder, the default access assigned to the member is **Basic**.
- **Read** - Members can view the folder properties, participate in discussions for it, view the accesses for the folder and checkout documents.
- **Read Write** - Members can perform all the tasks described for the **Read** access, and edit basic information for the folder.
- **Add** - Members can perform all the **Read Write** actions, add content to folders and create sub-folders.
- **Remove** - Members can perform all the **Read Write** actions, remove documents from folders and delete the sub-folders.
- **Add Remove** - Members can perform all the **Add** and **Remove** actions.
- **Full** - Members have the owner access.
- **All** - Members can have all the accesses allowed by their role.

  The security context (**Organization** and **Collaborative Space**) is added by default with the **All** access.



About Workspace Templates

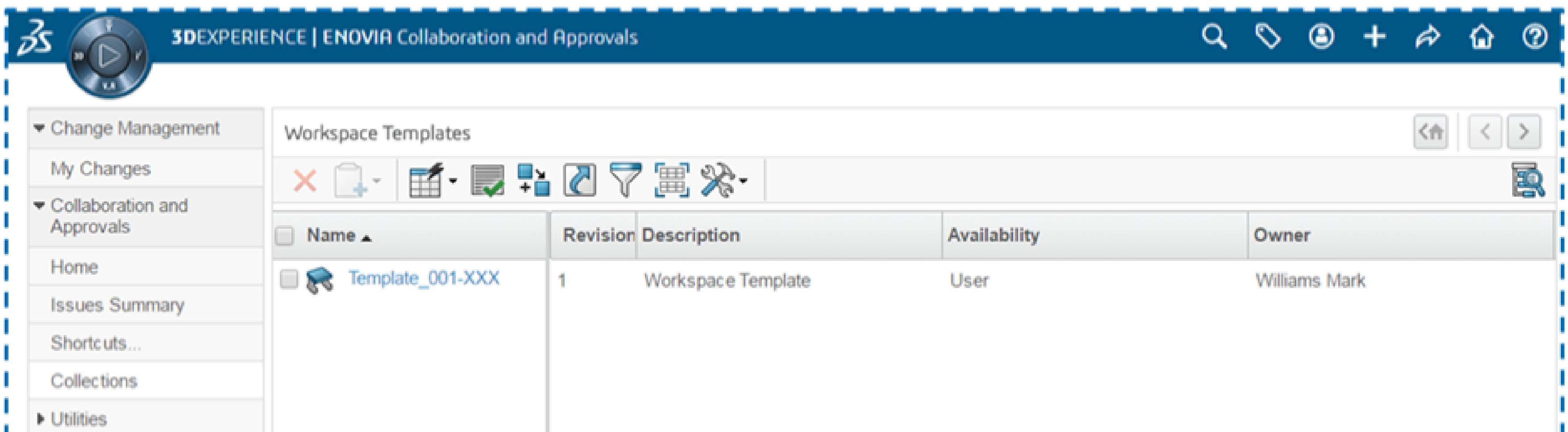
You can use workspace templates to speed up the process of creating a workspace, which is similar to the one you have already created.

A workspace template saves the frequently reused components of a workspace, such as:

- Workspace description
- Workspace members
- Access privileges
- Folder structure

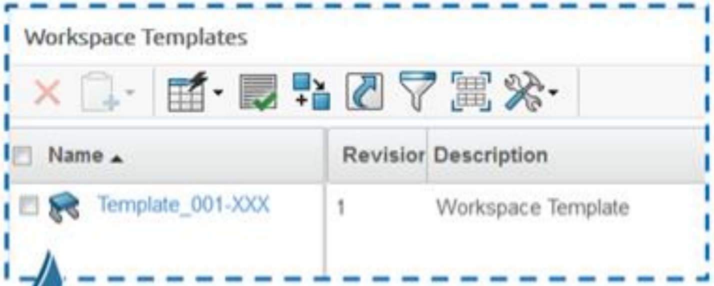
Select **My Desk > Team > Workspace Templates**, to view the available templates.

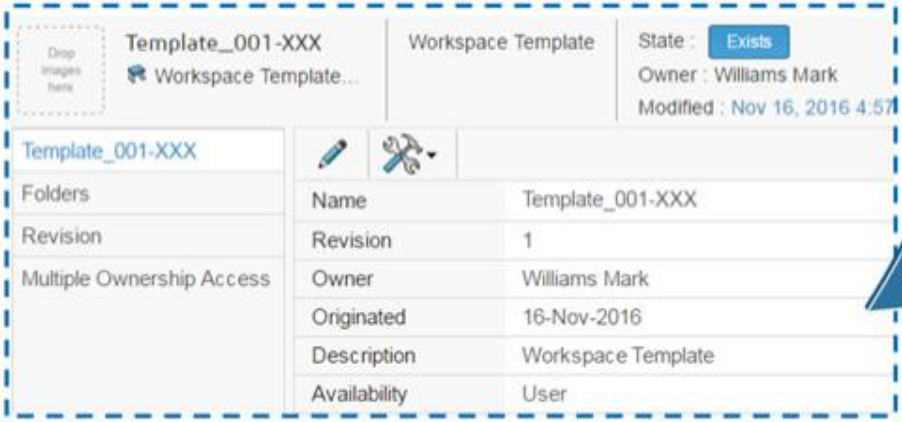
The **Availability** columns shows if the template is available only to the logged in (**User**), or all the workspace members (**Enterprise**).



Viewing the Workspace Template Details (1/2)

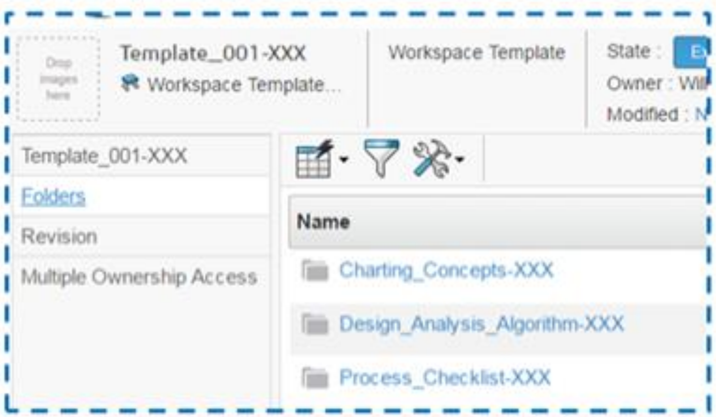
Click the template name to view its basic details. You can edit the **Name**, **Description** and **Availability** of the template using the **Properties** page. This page also shows the highest revision of the template.





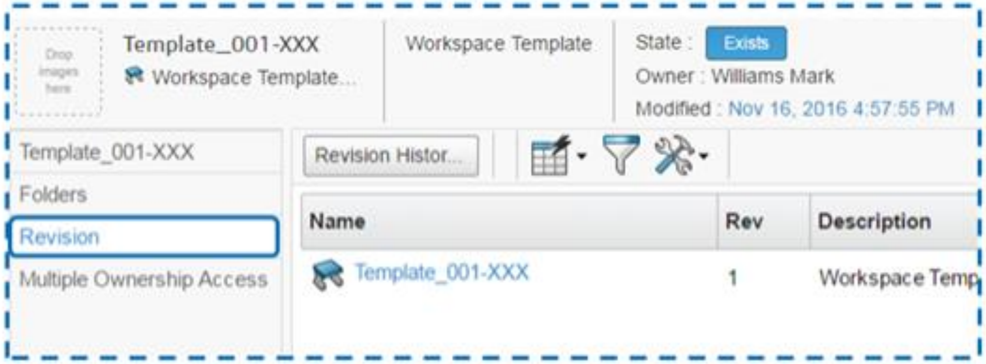
You can use the category tree to browse the template related pages.

- The **Folders** page for a workspace template lists the folders that will be created in any workspace, based on this template.

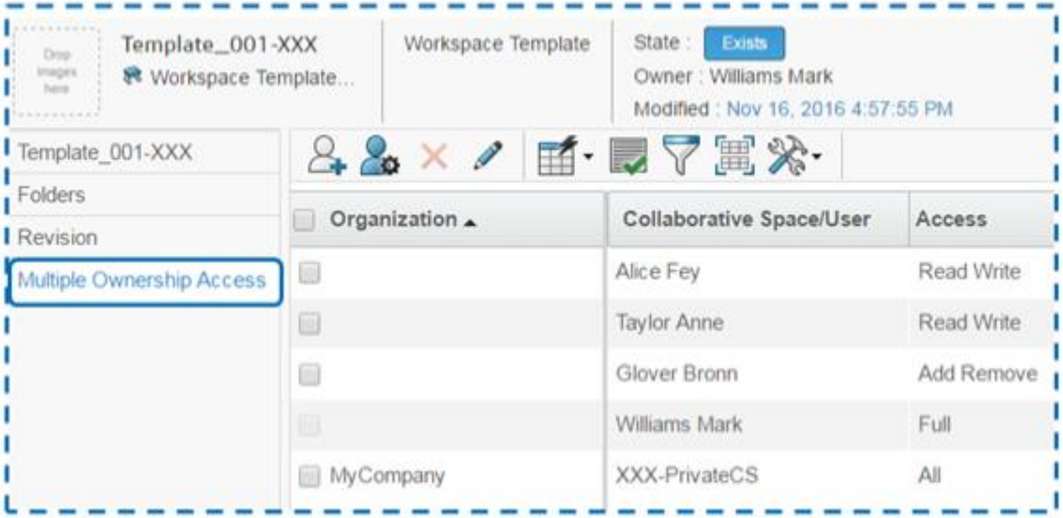


Viewing the Workspace Template Details (2/2)

- The **Revision** page for a workspace template lists all the revisions of the workspace template.



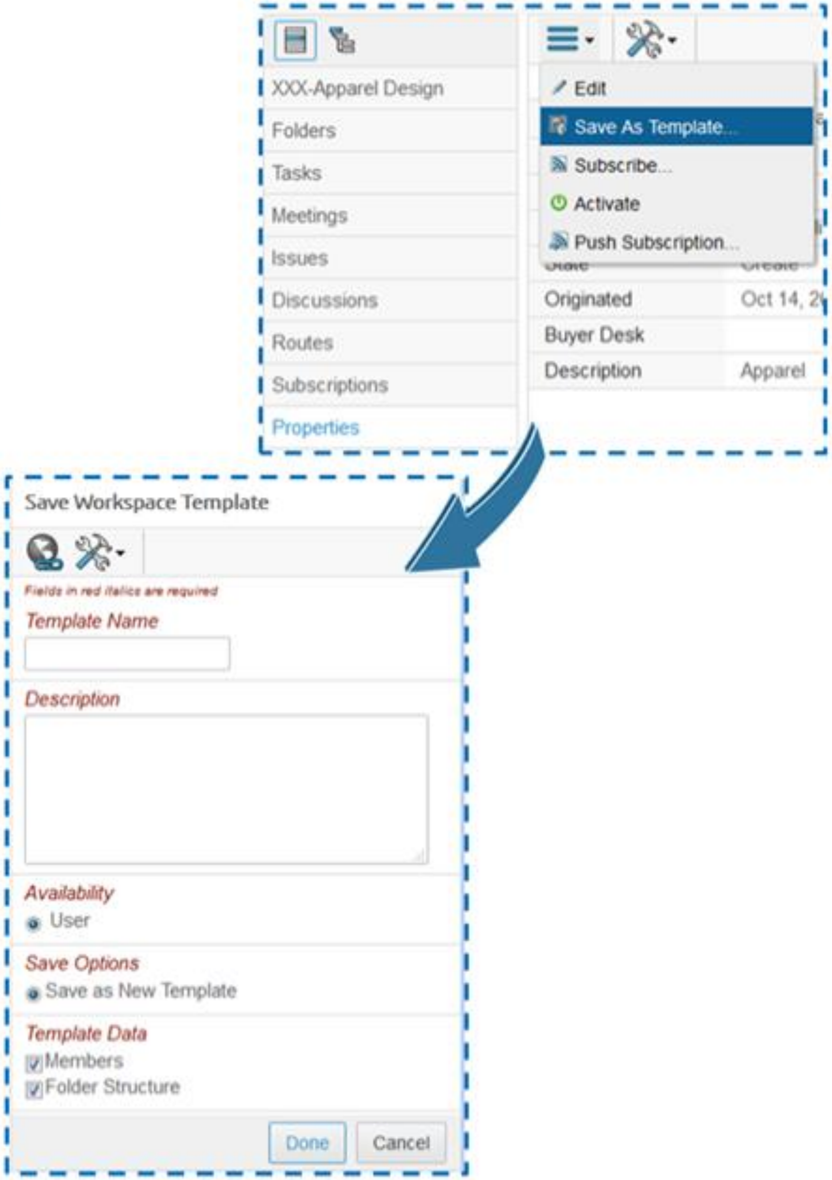
- The **Multiple Ownership Access** page shows the members assigned to the workspace and their access types. You can also add members and edit the accesses using this page.



Creating Workspace Templates

To create a workspace template, save an existing workspace as a template.

- You can select the type of **Availability** of the template as a user-level or enterprise-level.
  - **User**: The template is available only to you and from within the current workspace.
  - **Enterprise**: This option is available only if you are designated as a Company Representative. Choose this option if you want the template to be available for all workspace members.
- If the workspace was already based on a template that you created, you can choose one of these **Save Options**:
  - **Save as New Template**: A new template will be created.
  - **Revise Template**: The workspace will be saved as a new revision of the template from which it was created.
- Choose the components from the original workspace to include in the template:
  - **Members**
  - **Folder Structure**

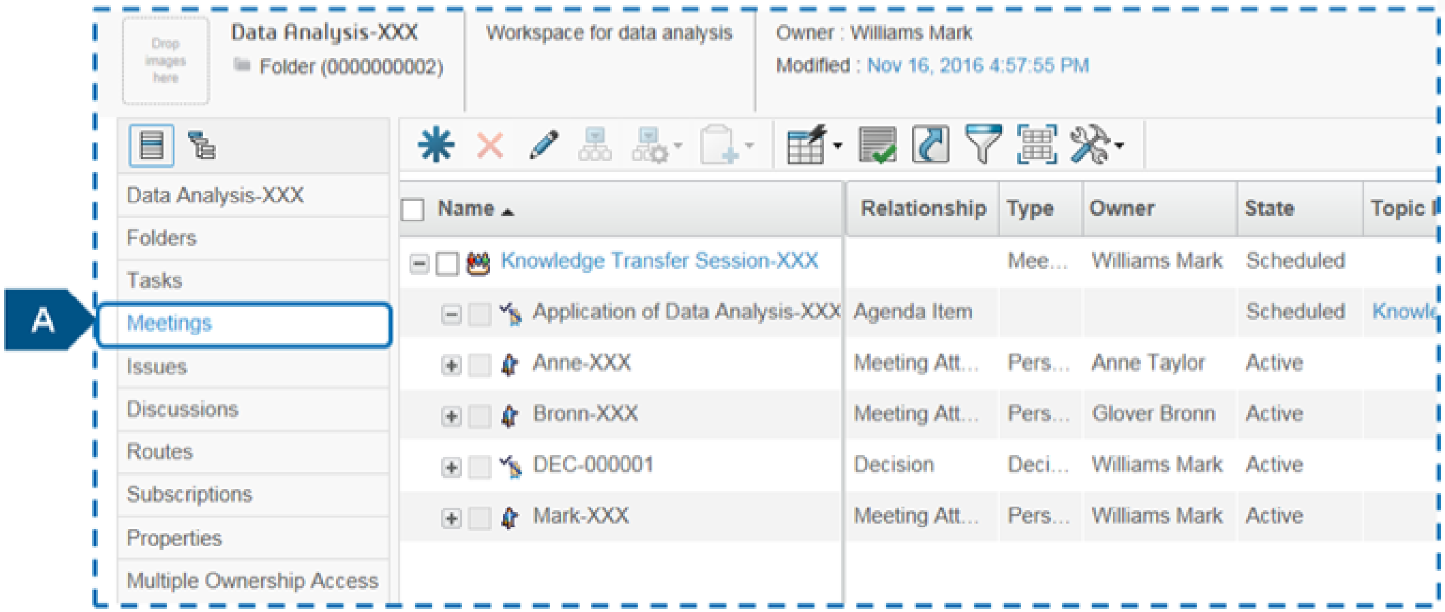


About Meetings (1/2)

You can create and manage meetings as part of your team collaboration.

There are two ways of accessing the **Meetings** page.

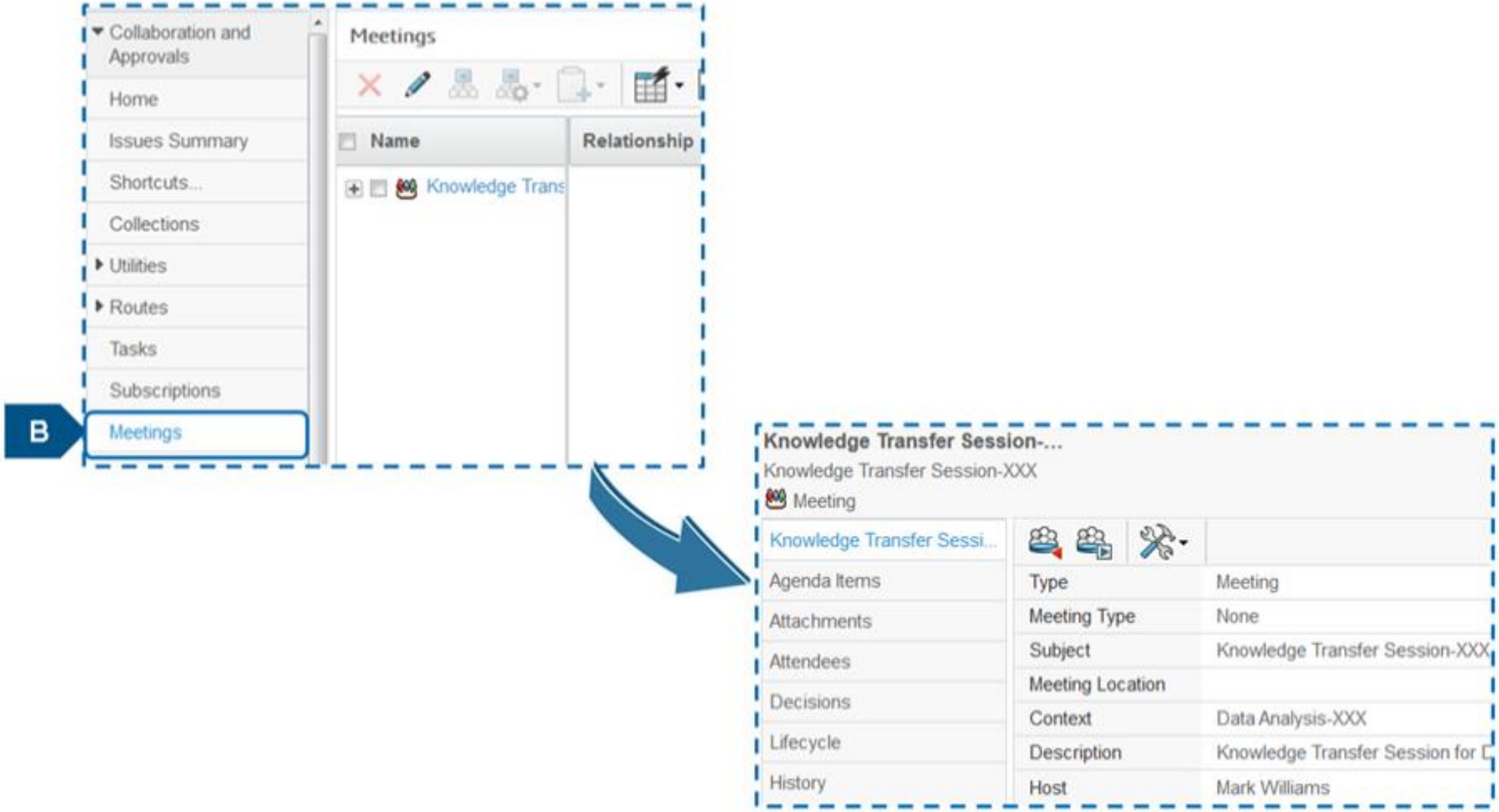
A. Select **Meetings** in a workspace's category tree, if you want to view the meetings specific to the workspace.



About Meetings (2/2)

B. In the **My Desk** menu, select **Collaboration and Approvals > Meetings**, to view all the meetings scheduled by you.

The **Relationship** column displays the objects that are related to the meeting. You can add agenda items, attendees and decisions to a meeting.



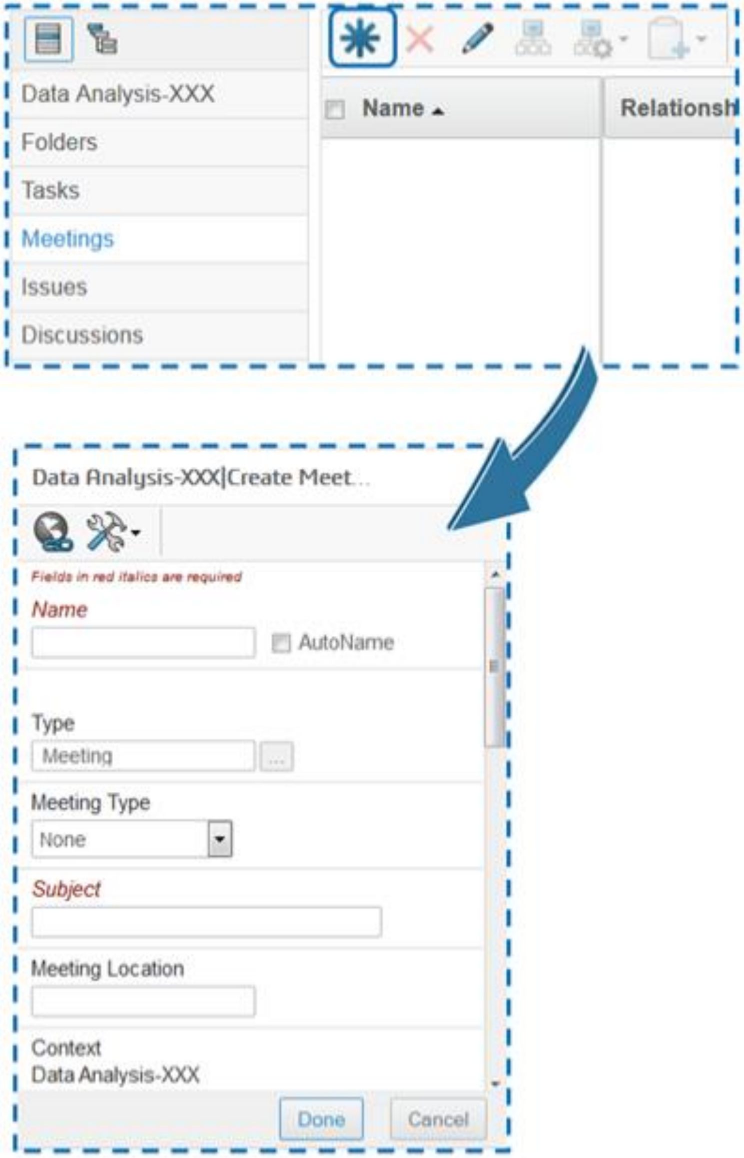
Creating a Meeting

In a workspace's **Meetings** page, click **Create New**.

In the **Create Meeting** dialog box, you can select the defined meeting type (created by the system administrator).

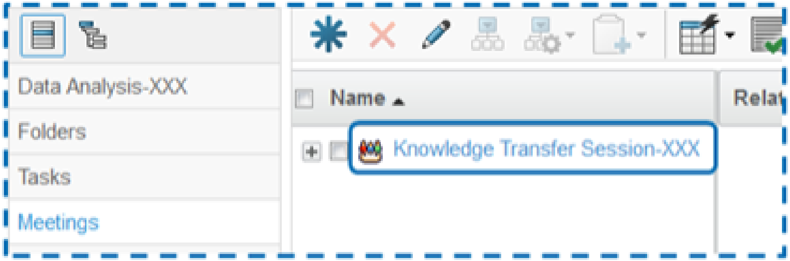
In case you do not select a specific type, the default **Meeting** will be selected.

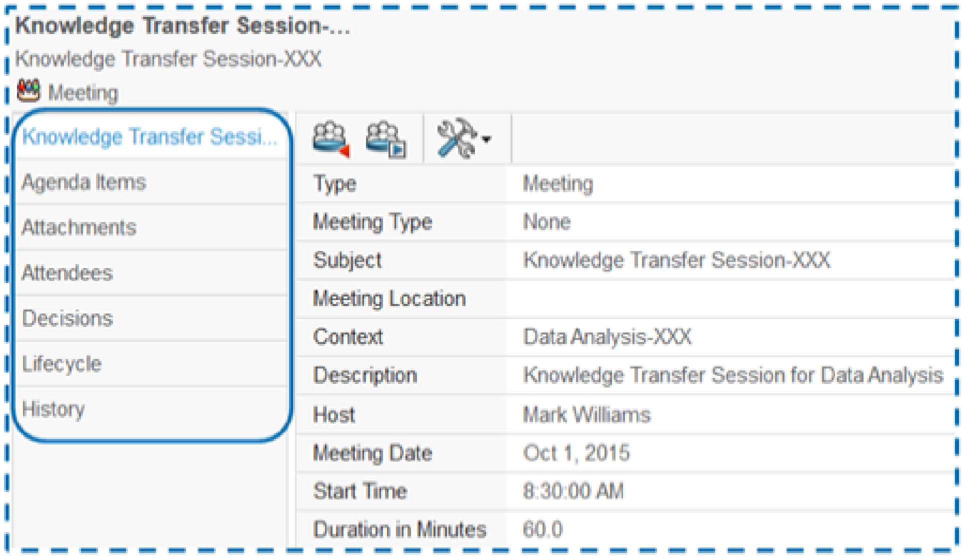
You must specify the mandatory details of the meeting (i.e. the fields displayed in red) and click **Done** to create the meeting.



Defining the Agenda and Attendees (1/3)

When you click a meeting's name, its properties are displayed. You can use the category tree to view and edit information related to the meeting's agenda and attendees.

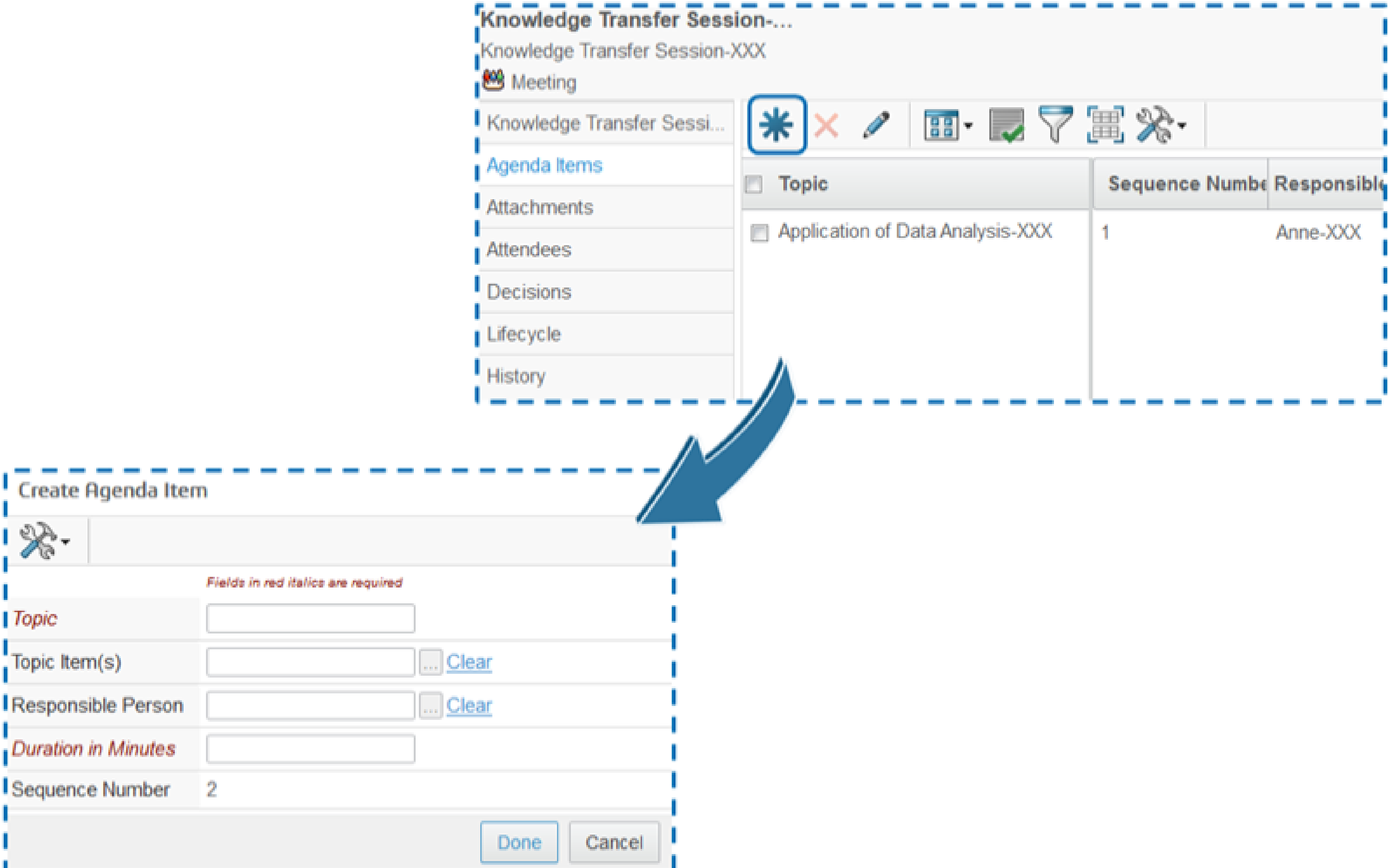




Defining the Agenda and Attendees (2/3)

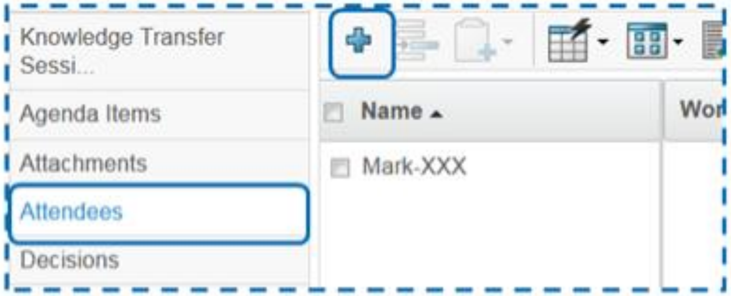
You can list the topics for the meeting and assign members for them, using the **Agenda Items**.

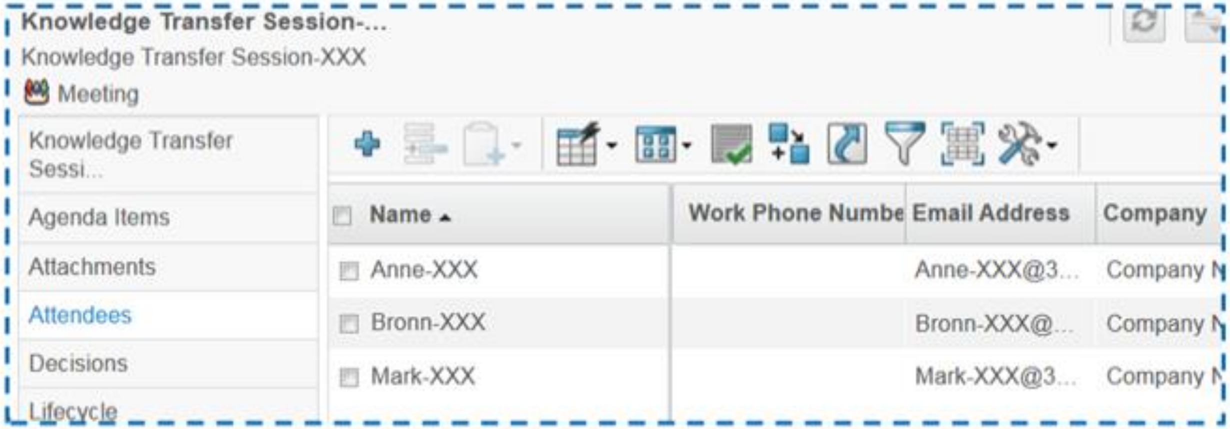
While creating a new agenda, you can select the **Topic Item(s)** and the **Responsible Person** from a pre-defined list.



Defining the Agenda and Attendees (3/3)

In the **Attendees** page, you can view the members who will attend the meeting. You can also add or remove attendees.



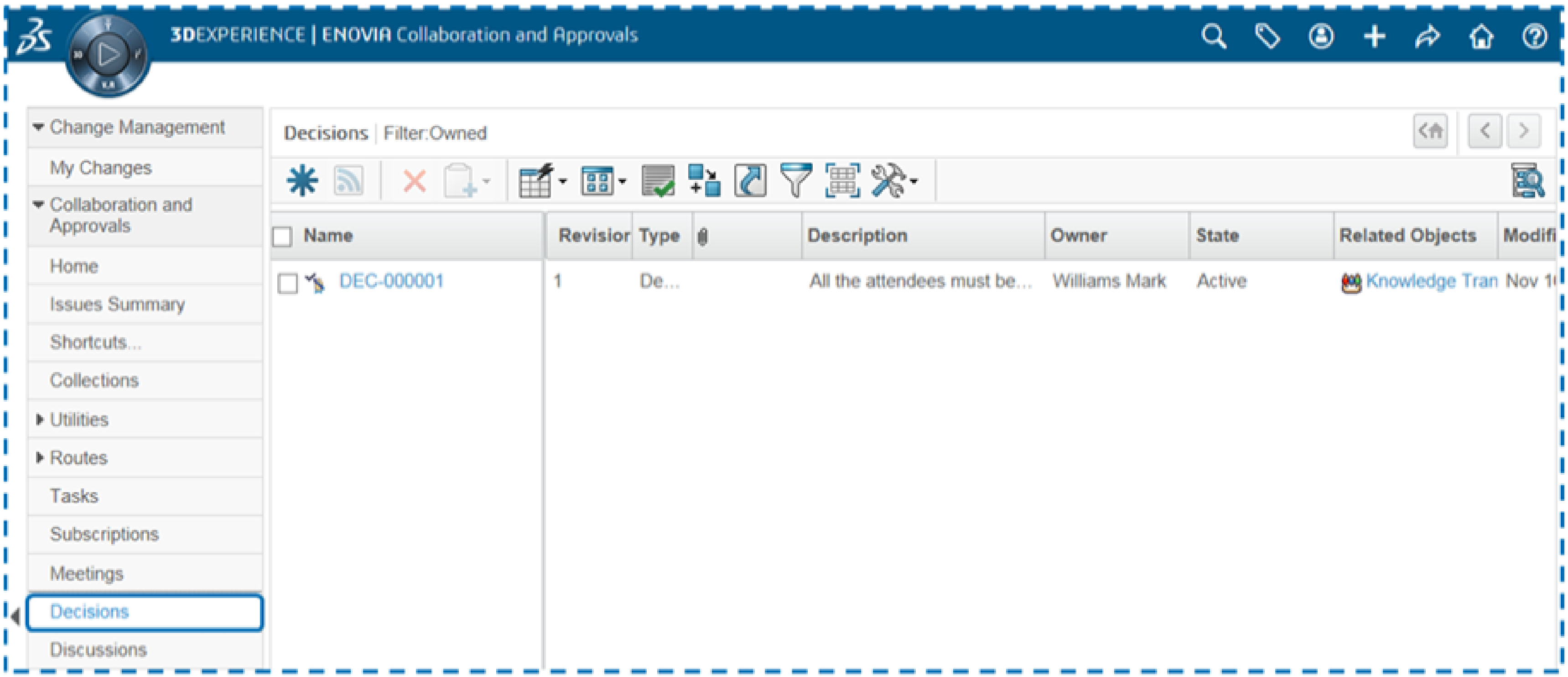


About Decisions (1/2)

You can save and track decisions taken during a specific meeting or for the app specific objects.
You can view the **Decisions** page in either of the two ways:

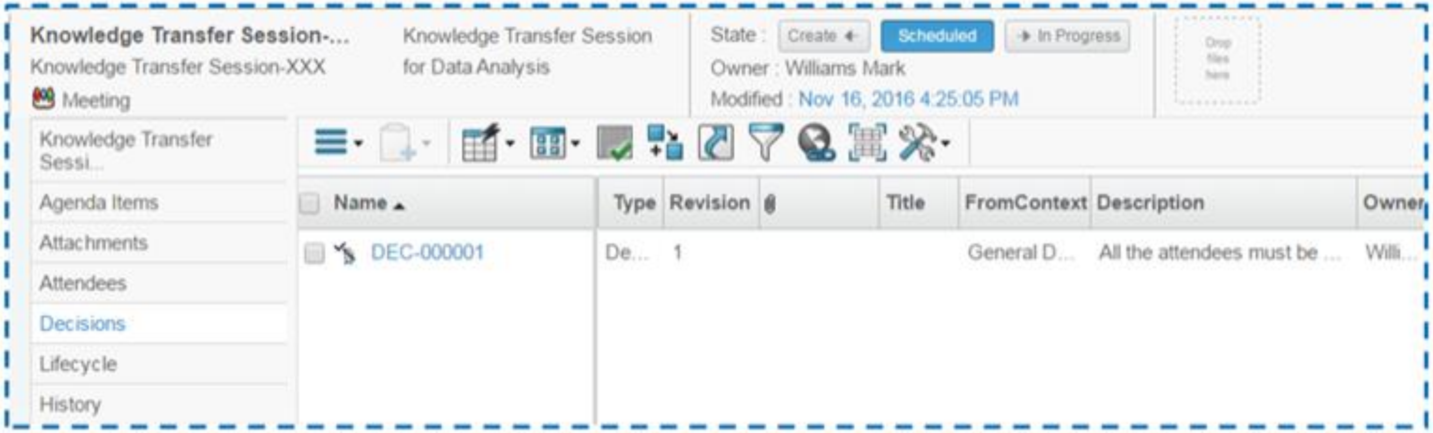
A. In the **My Desk** menu, select **Collaboration and Approvals > Decisions** to view all the decisions on one page.

The **Related Objects** column displays the object for which, the decision has been taken.



About Decisions (2/2)

B. In a meeting's category tree, select **Decisions**, to view the context specific decisions.



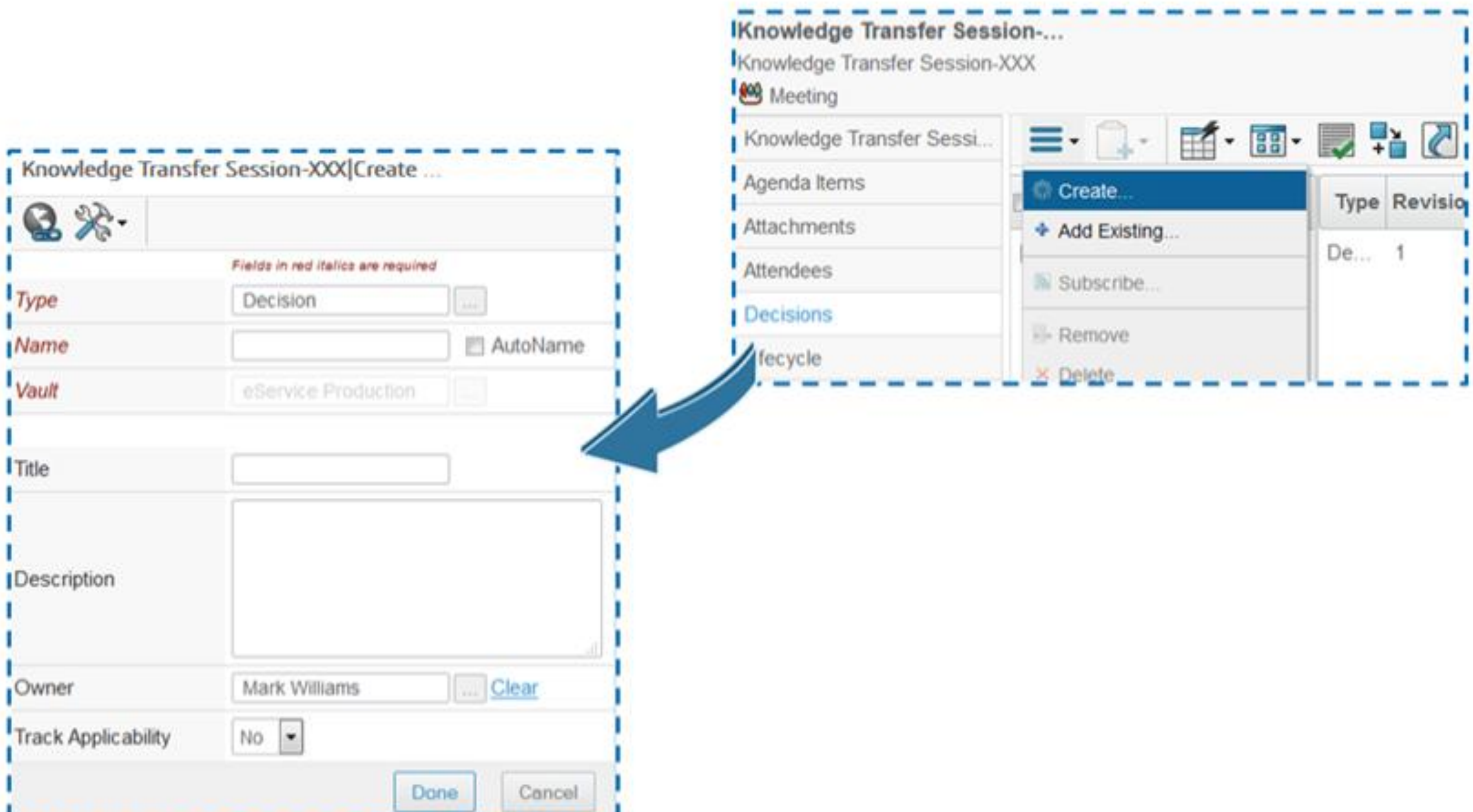
Adding Decisions (1/2)

There are two ways of adding decisions.

A. In the **Decisions** page, Select **Actions** > **Create...**.

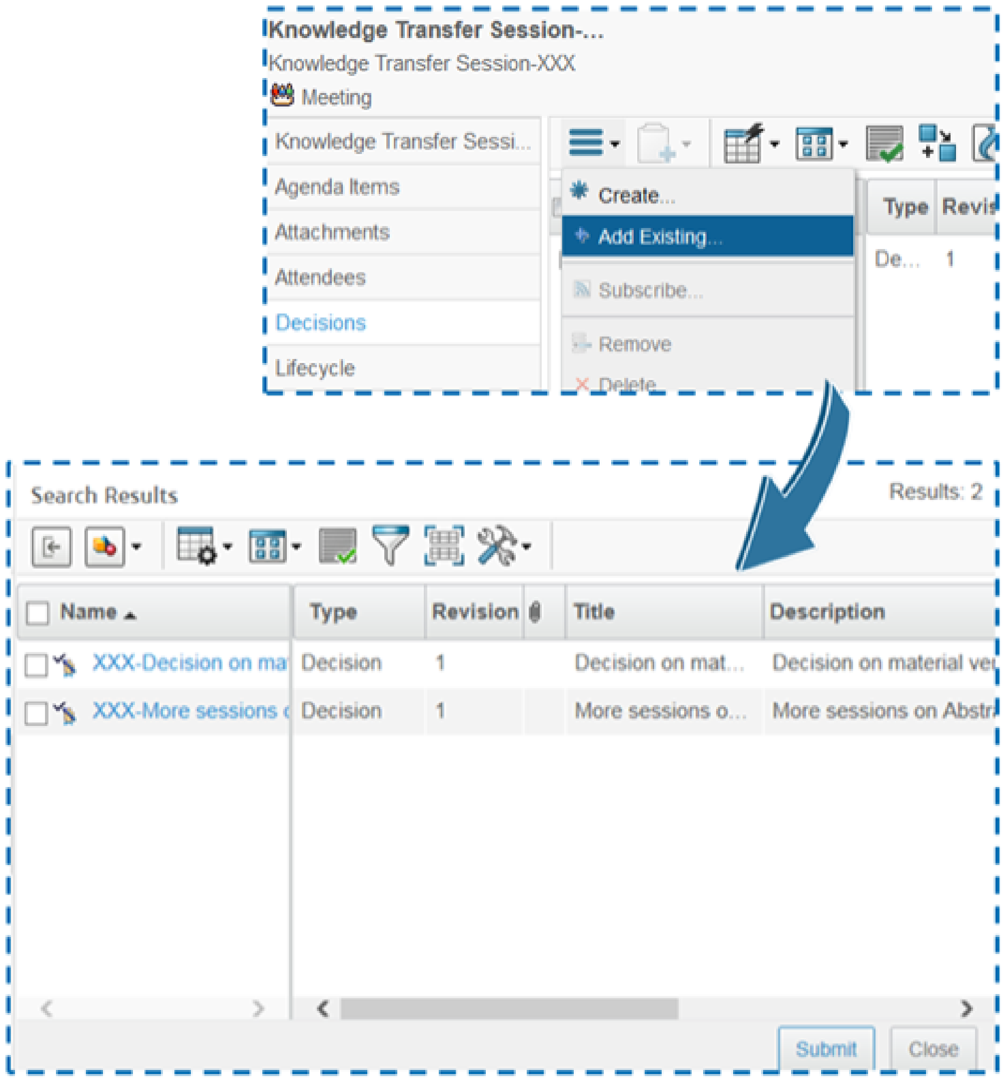
You must specify the mandatory details required to create the decision.

Using this method, you can create standalone decisions and reuse it in the app specific contexts (discussed in the next page).



Adding Decisions (2/2)

B. Navigate to an object's **Decisions** page; you can use the **Actions** menu to create new decisions or add the existing ones.

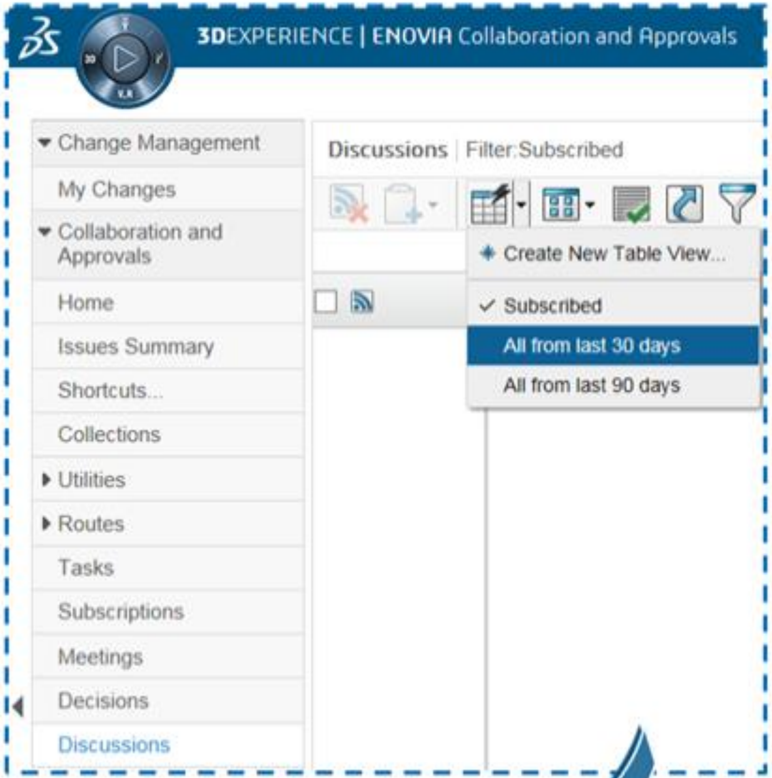


About Discussions (1/2)

In a workspace, you can start a discussion between all the members. You can also attach documents related to the discussion. When you create a new discussion, the system automatically subscribes you to that discussion. If anyone replies to the discussion, you receive a notification.

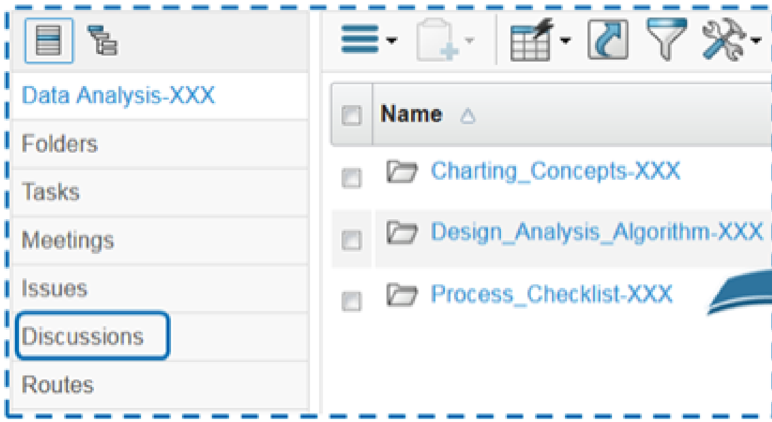
In the **My Desk** menu, select **Collaboration and Approvals > Discussions** to view the discussion created or subscribed by you.

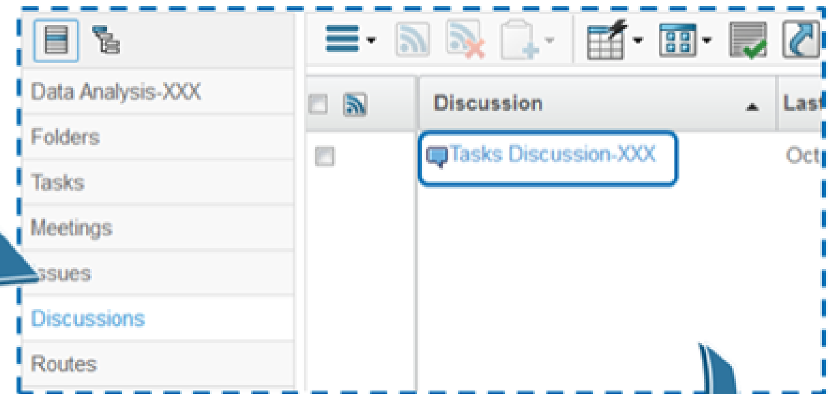
Use the filter on the page toolbar to select a filter option.



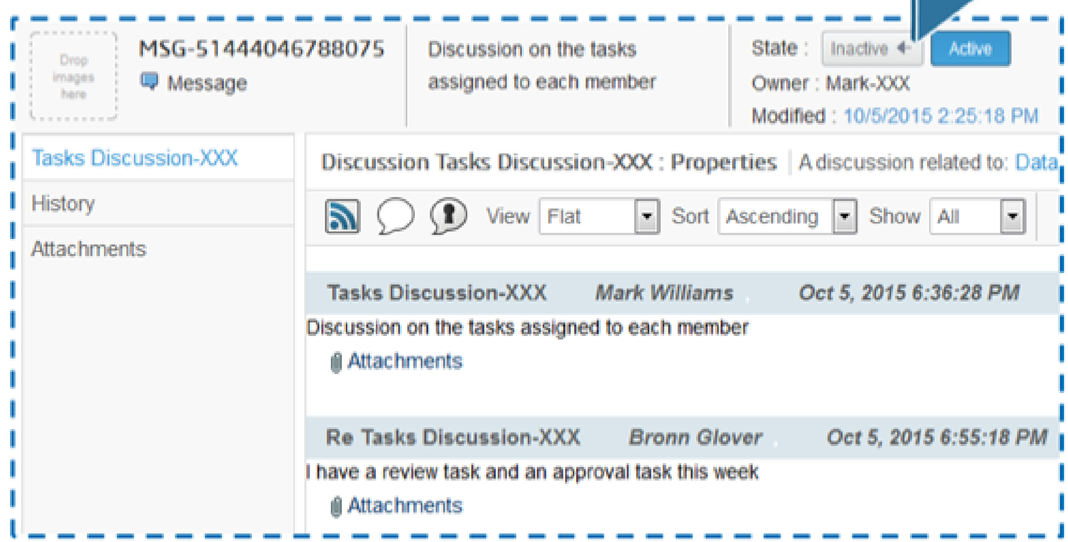
About Discussions (2/2)

You can also use a workspace's category tree, to view its **Discussions** page.



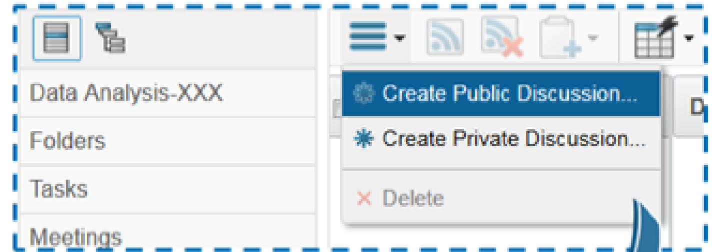


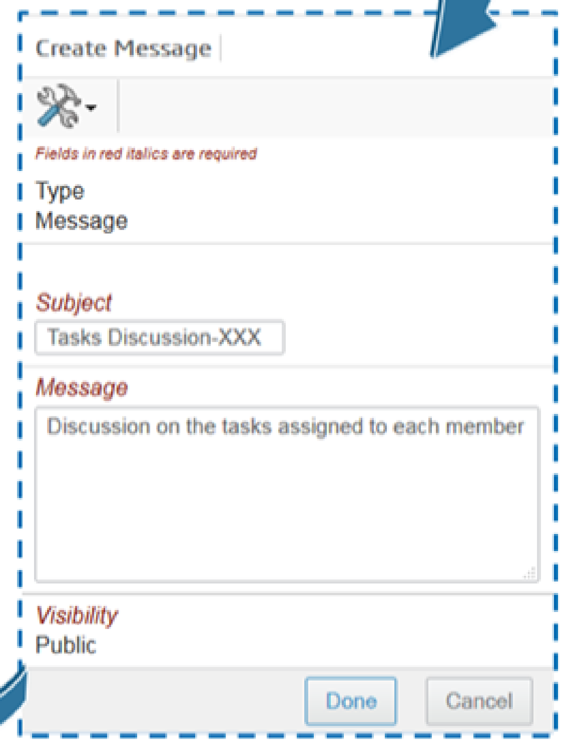
Click the discussion name to view its **Properties** page. You can view the discussion thread on this page, as well as reply to it.

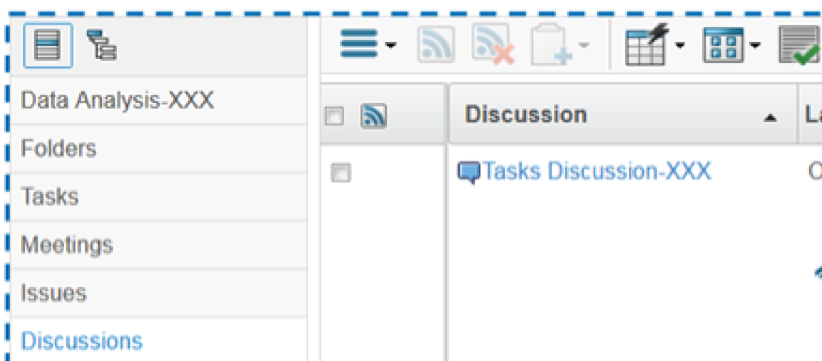


Creating Discussions

In the **Discussions** page, select **Actions > Create Public Discussion….**

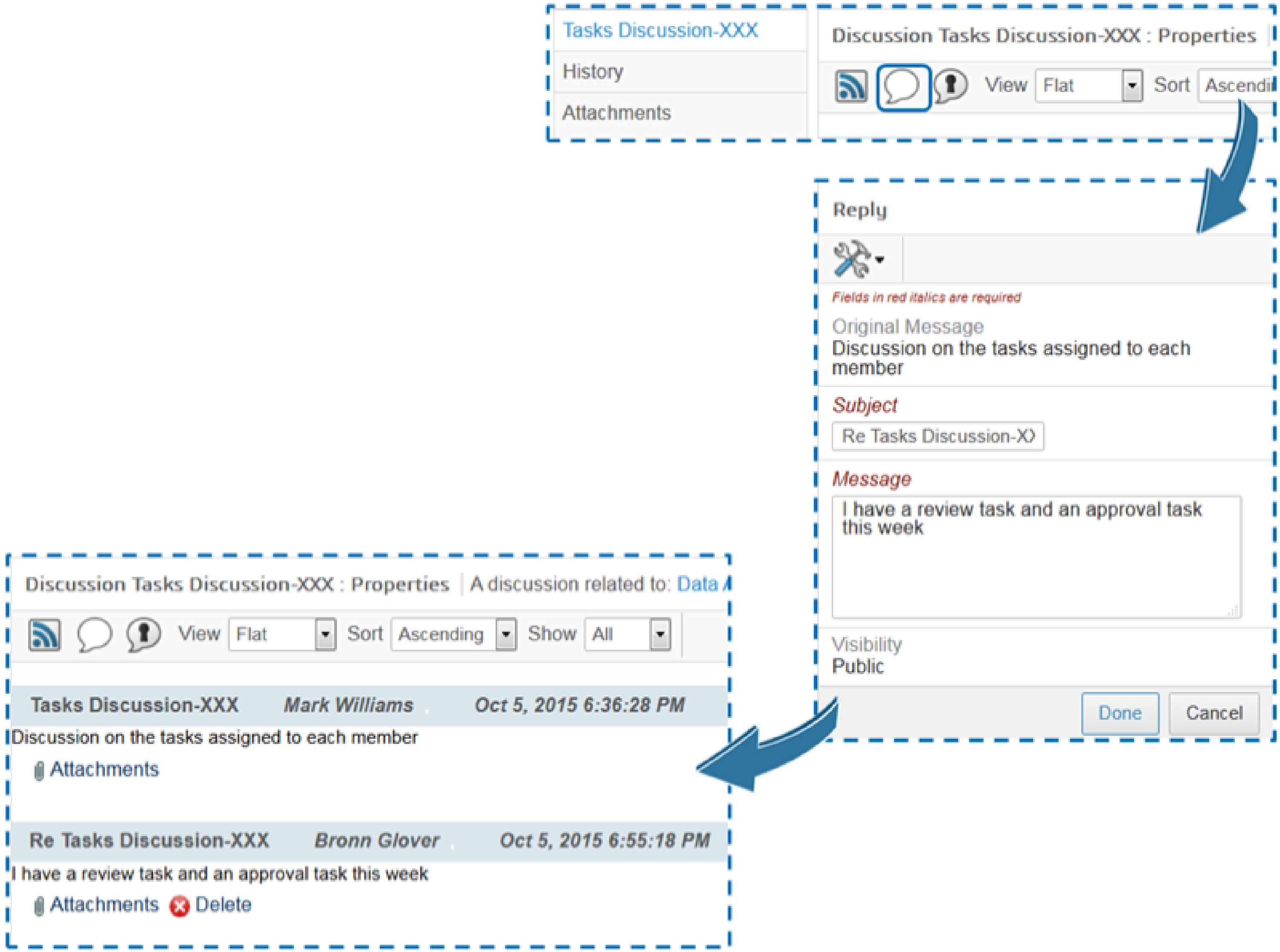






Replying to a Discussion Thread

You can reply to the messages in a discussion that you have access to, using the reply button.

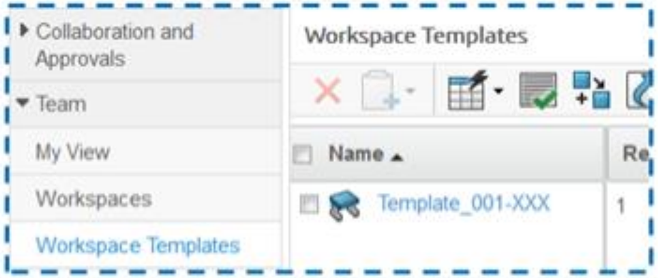


Summary

Managing the Workspaces (1/2)

- A workspace is a collection of folders and documents that helps you manage all the information required to accomplish your business needs. Workspaces consist of the following components:
  - Folders
  - Members
  - Routes
  - Meetings
  - Subscriptions

- You can use workspace templates to speed up the process of creating a workspace, which is similar to one you have already created.



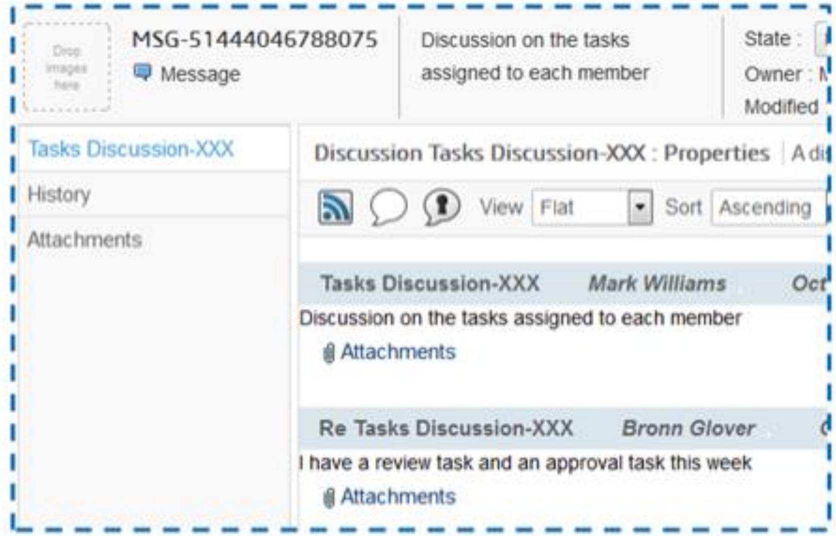
Summary

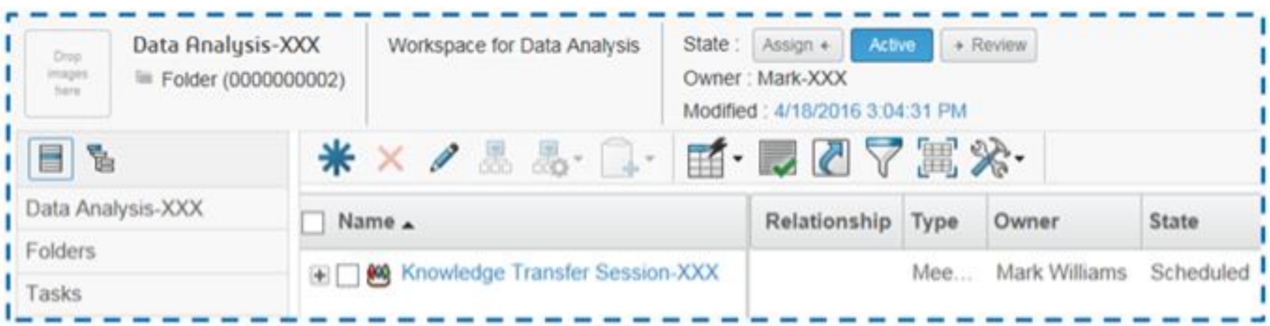
Managing the Workspaces (2/2)

- A folder contains a set of documents and files related to a particular workspace. You can create sub-folders within a folder to further group the documents. Folders maintain a single lifecycle state called Exists.

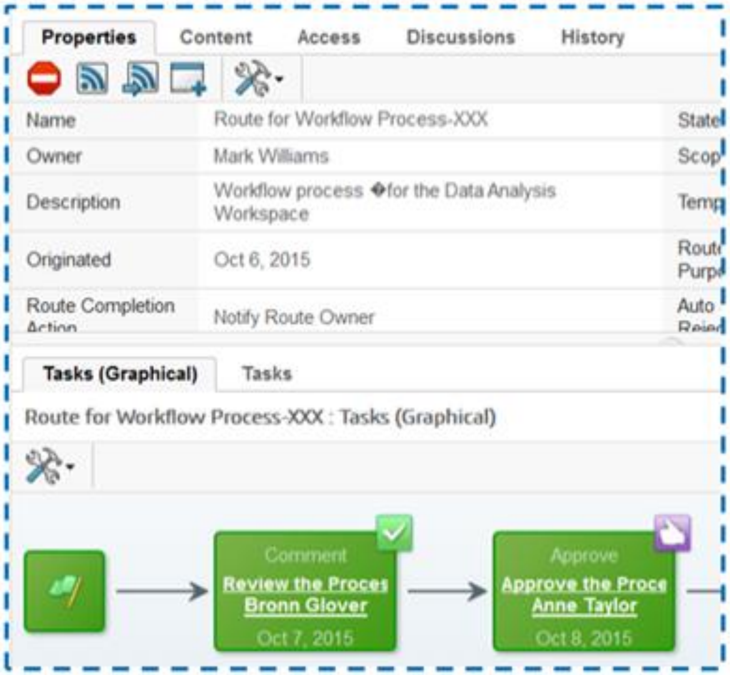
- You can save and track decisions taken during a specific meeting or decisions taken for the app specific objects.

- In a workspace, you can start a discussion between all the members. You can also attach documents related to the discussion. When you create a new discussion, the system automatically subscribes you to that discussion. If anyone replies to the discussion, you receive a notification.





Working with Routes



Here are the topics to be covered:

1. *Getting Started with the ENOVIA Collaboration and Approvals App*
2. *Managing the Workspaces*
3. **Working with Routes**
4. Managing the Assigned Tasks
5. Working with Subscriptions
6. Managing Issues
7. Working with the Common Document Model

About Routes (1/2)

When you work on a project (a set of assignments), the members are expected to access the project, perform their assigned tasks and complete them. When a member completes a task, the next members in the project's chain must be informed before they start working on their tasks. You can set up a workflow process for this, using routes.

You can create a route for a list of tasks and assign the members to complete them. The assignees receive their tasks along with instructions that informs them about their actions.

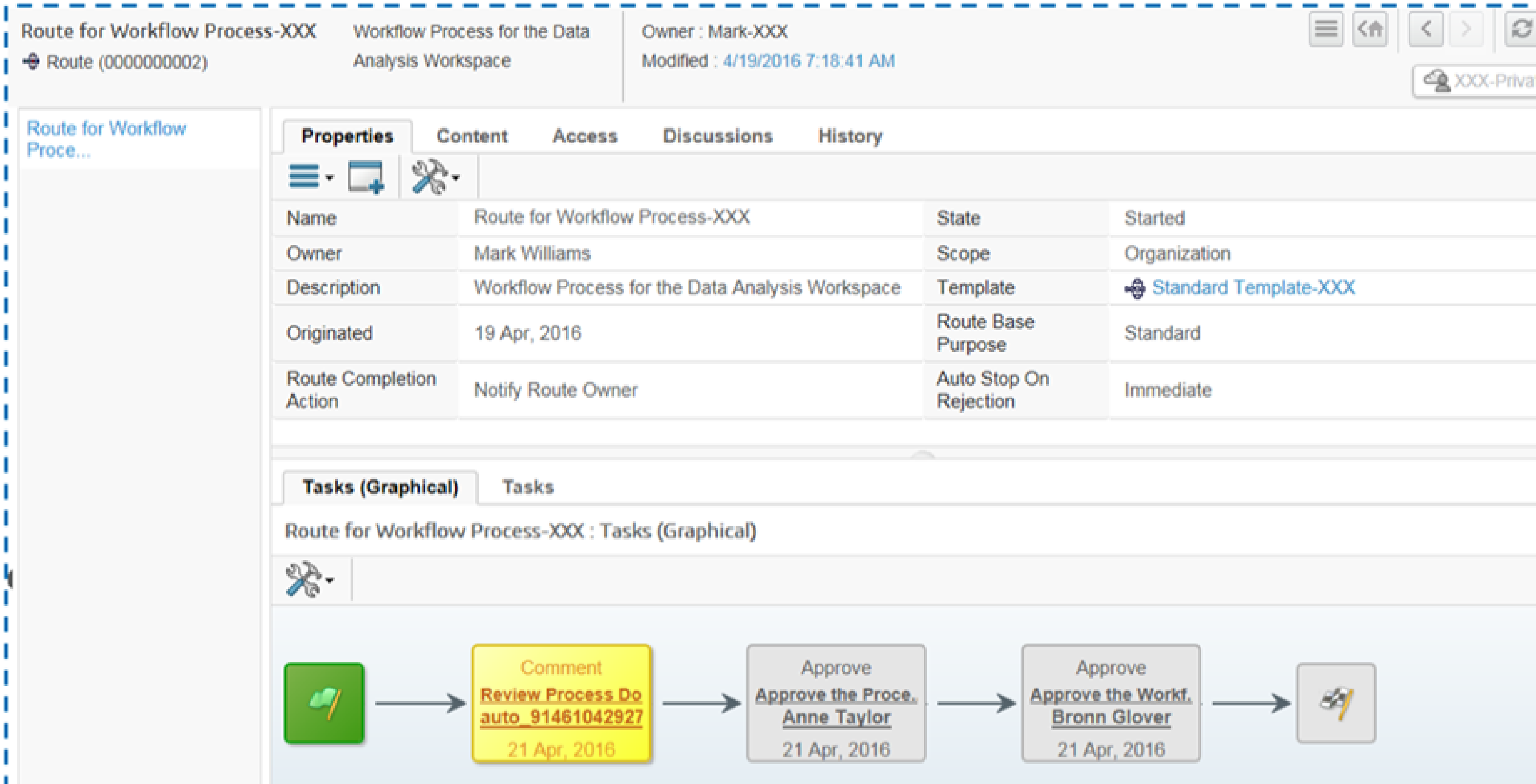
For example, a route can define who needs to review, modify or approve an object before it can be promoted to the next state in its lifecycle.

You can assign multiple members for a task, and specify the order in which they must complete it. You can also assign the members who must be notified about the task, however, need not take any action on it.

Note:
You can view the tasks assigned to you in a route using **My Desk > Collaboration and Approvals > Tasks**.
You will learn more about tasks in the next topic.

About Routes (2/2)

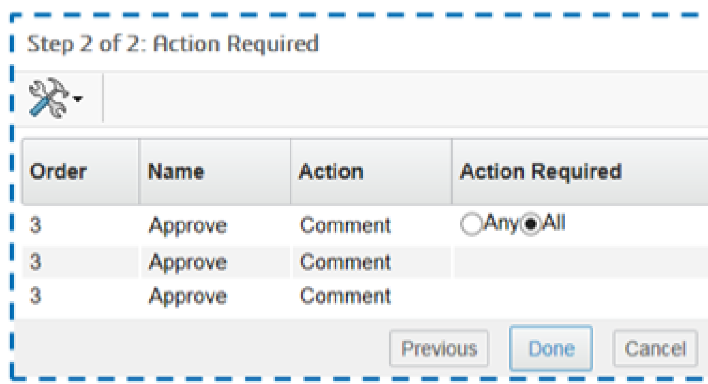
You can add content to a route, define its access rights, start a discussion, create and edit its tasks. These details help the route members to complete their assigned tasks.



Functioning of a Route

Tasks can be sequential or parallel, and more than one task can be active in a route. When the route creator starts a route, the system activates all tasks of order number 1 and notifies the assignees for each task. If the assignee is a group or role, one member of the group or role must accept the responsibility for the task. The assignees complete the task as defined in the route, and mark them as **Complete**. The system then activates task for the next person in the route and so on.

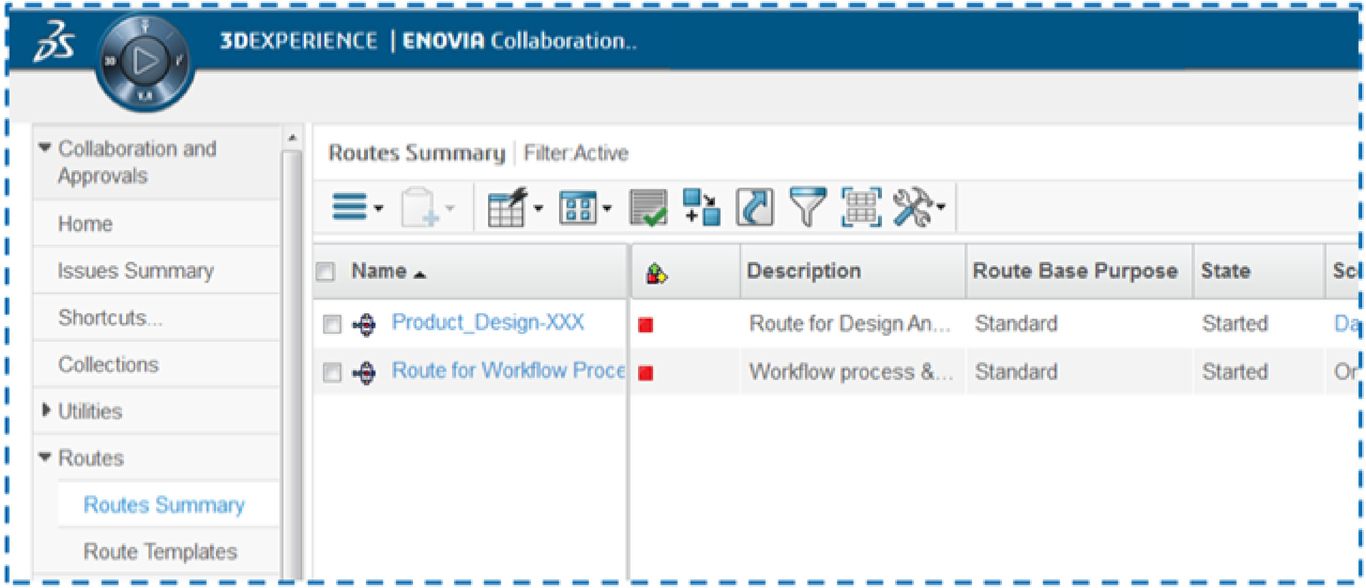
If more than one task is active at once, then you can specify whether only one task needs to be complete or they all must be complete before the next set of tasks become active.



Viewing the Routes Page

In the **My Desk** menu, select **Collaboration and Approvals > Routes > Routes Summary** to view the list of routes.

This page displays the routes that are either assigned to you or created by you.



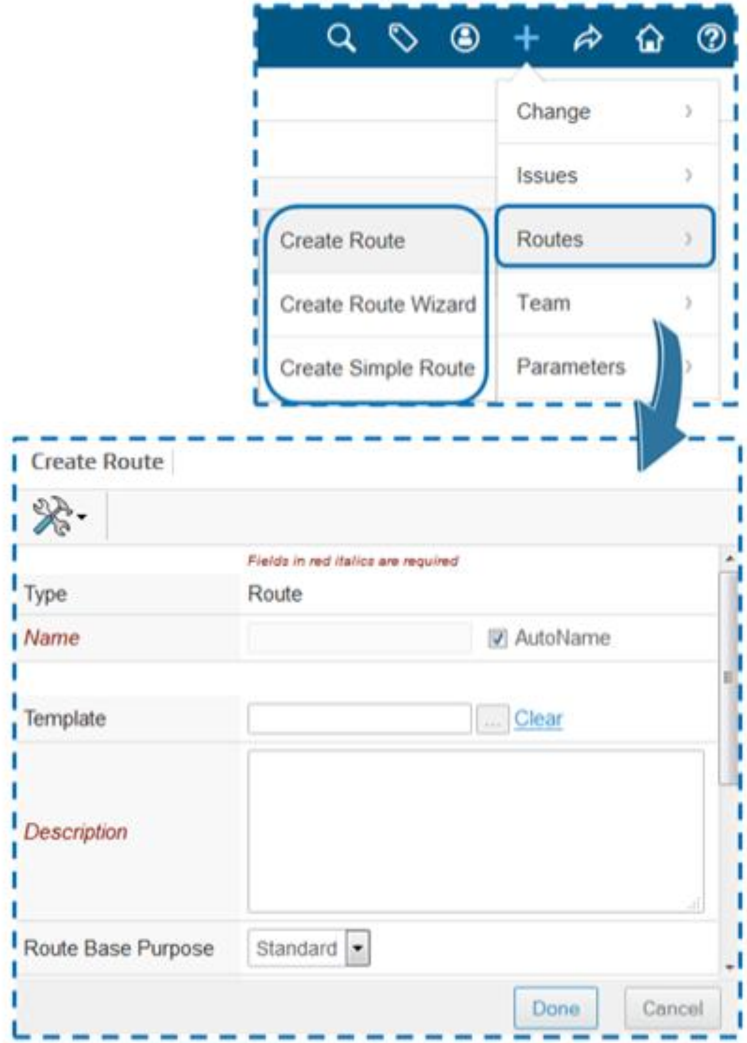
Creating Routes (1/3)

There are three ways of creating a route. You can use the **Actions > Routes** menu and:

- Select the **Create Route** command, which will create a route without route tasks and it will not be started. In this method the route tasks will be added to the route later.

- Select the **Create Route Wizard** command, which will create a route and define all of its components. At the end of the wizard, you can choose to start the route immediately or wait to start the route.

- Select the **Create Simple Route** command, which will create a route, assign members and create tasks. All the tasks will be at the same level.



If you create a route within the context of an object, that object automatically becomes the route content. You can also create additional content for the route.

Creating Routes (2/3)

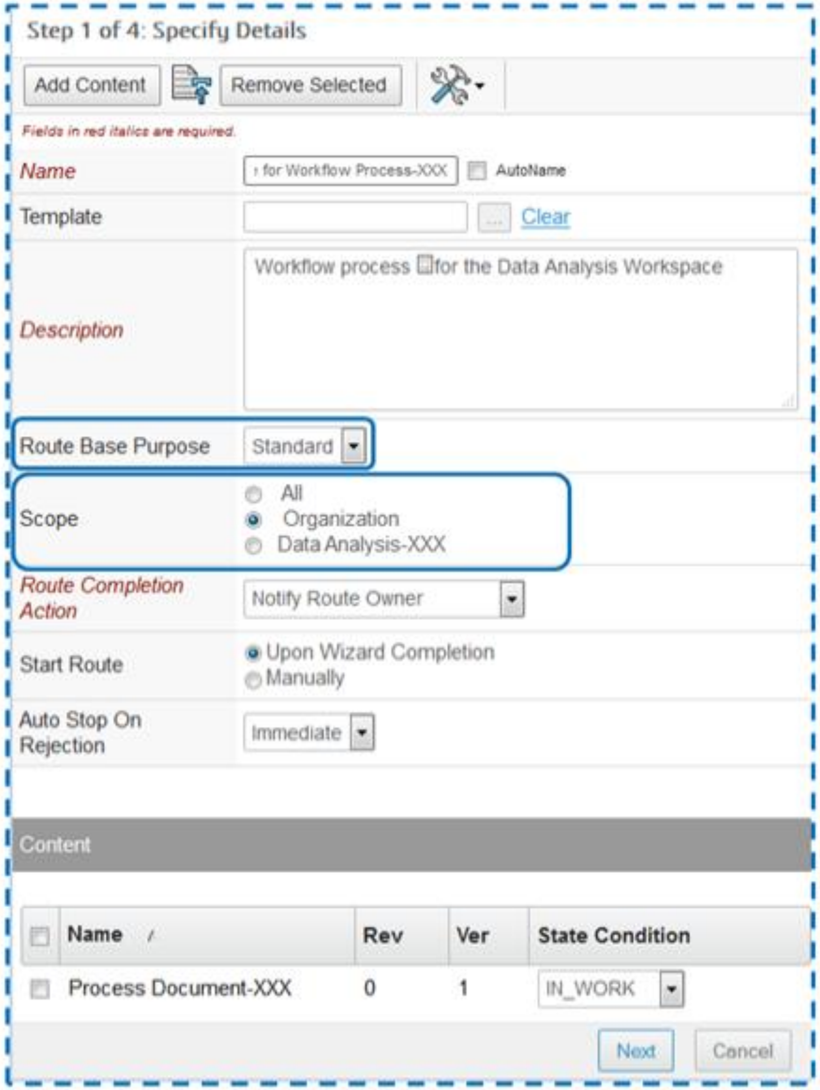
When creating a route, you need to specify the purpose of the route in terms of the route task actions.

The **Route Base Purpose** gives you three options to choose from:

- **Review**: All route tasks require the assignee's comments; the route task action will only have the **Comment** option.
- **Approval**: All route tasks require the assignee's approval; the route task action will only have the **Approve** option.
- **Standard** (the default option): The route task action provides the following options: **Approve**, **Comment**, and **Notify Only**.

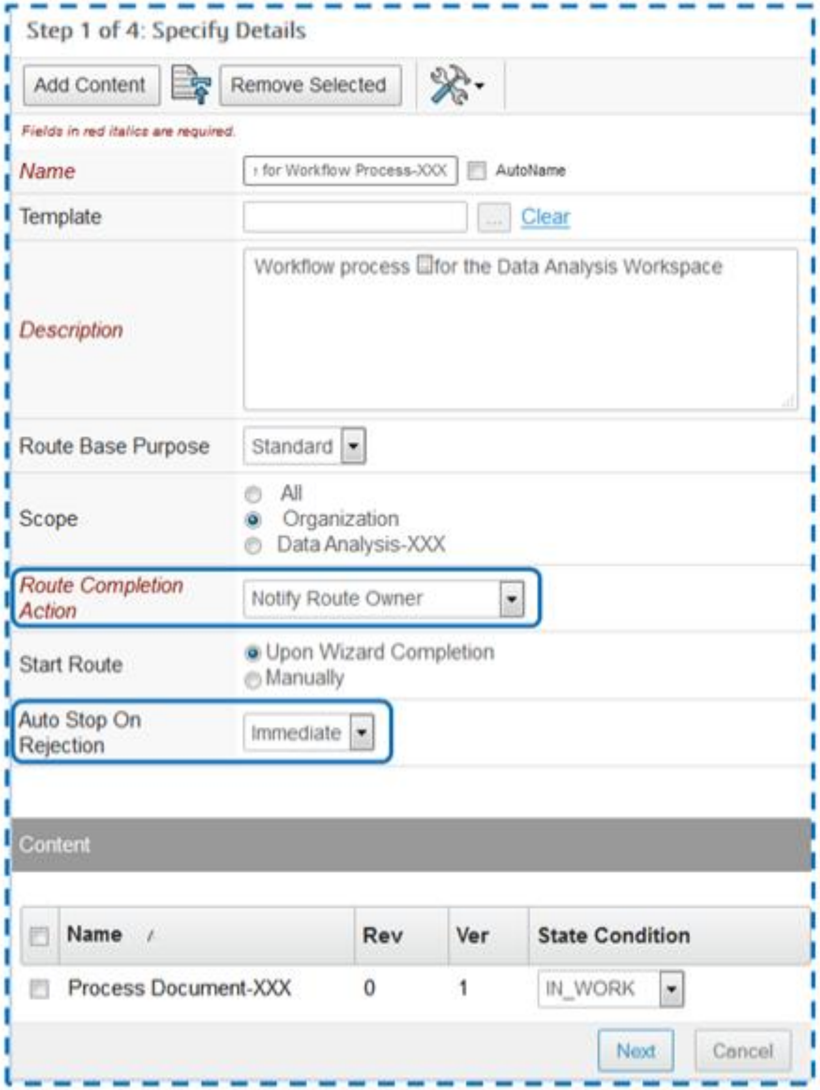
The **Scope** relates to the range of users that you can add as members. There are four options:

- **All**: You can add any user as a route member.
- **Organization**: You can add users only from your organization as a route member.
- You can also add a workspace or its folders as a scope.



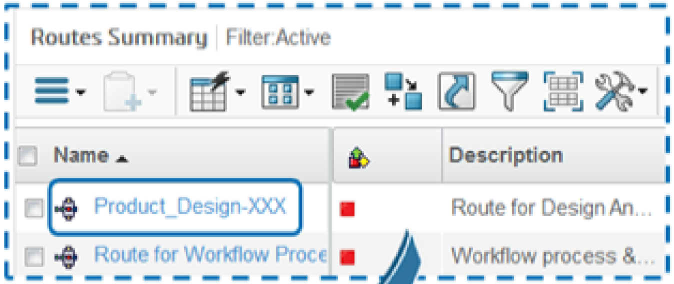
Creating Routes (3/3)

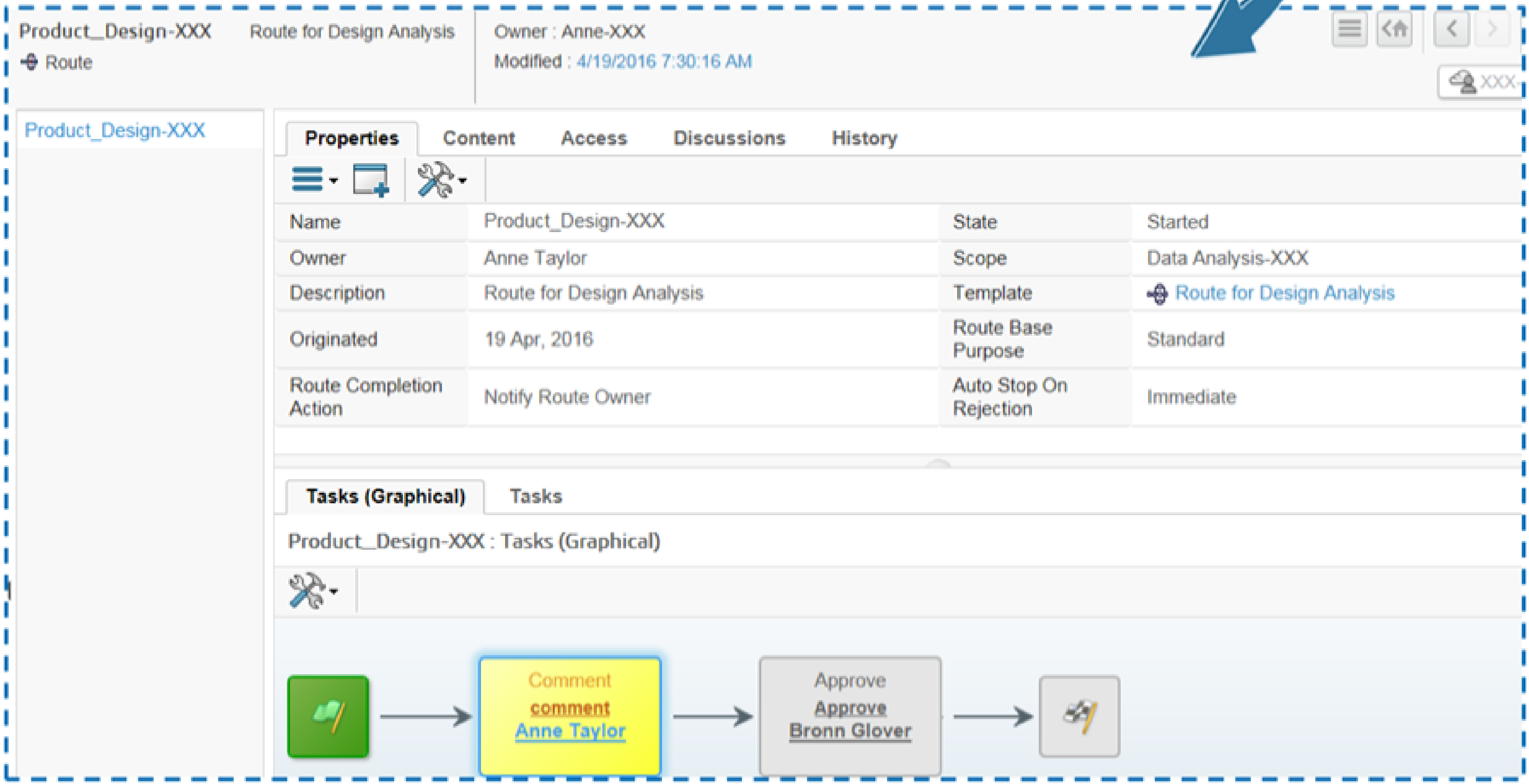
- **Route Completion Action**: The action to be performed when the route is completed. Available options are:
  - **Promote Connected Object**: It promotes the connected object.
  - **Notify Route Owner**: It notifies the owner that the route can be promoted.
- **Auto Stop On Rejection**: Actions to be performed when a route task is rejected. Available options are:
  - **Immediate**: It immediately stops the route.
  - **Deferred**: It waits for all the same level tasks to be completed before the route stops.



Viewing a Route's Details

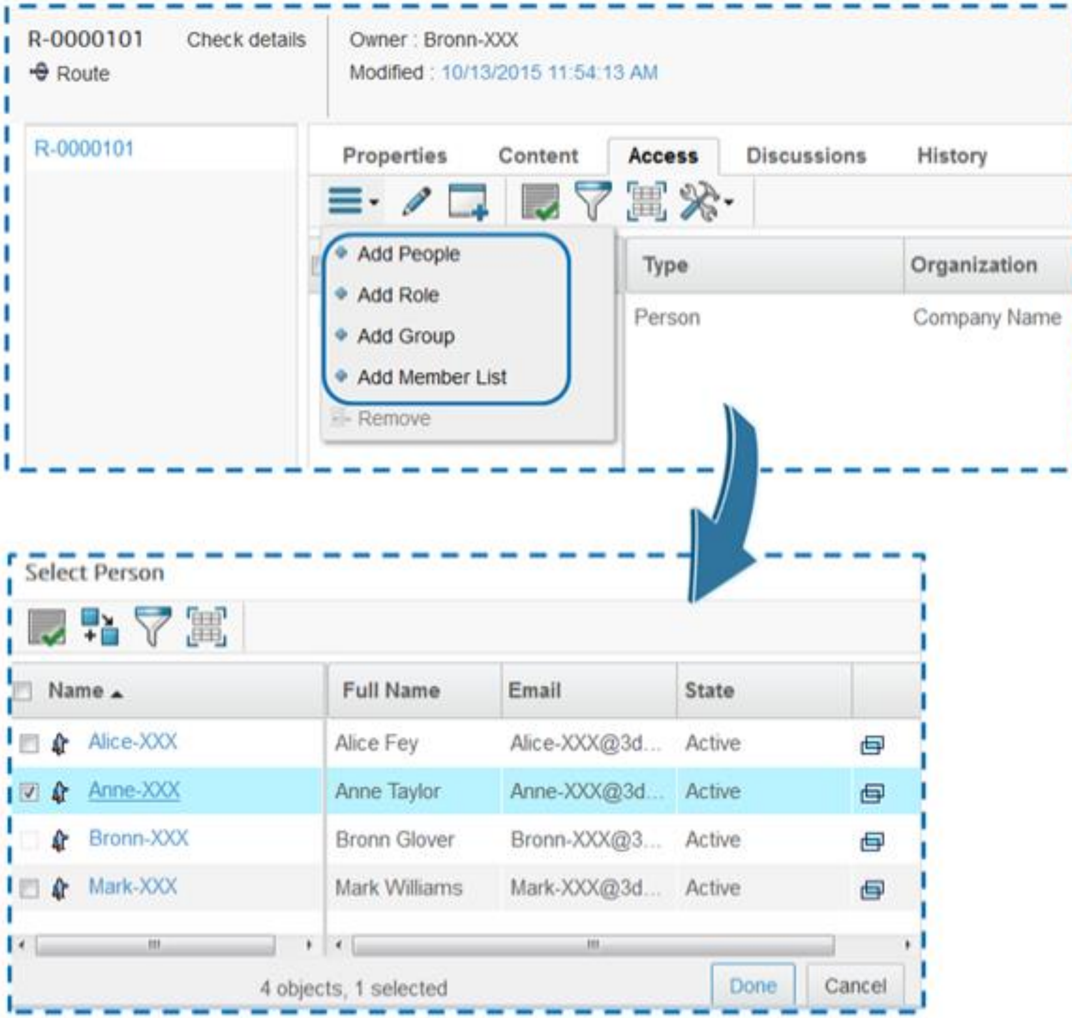
Click the route's name to view its **Properties** page.
You can use the page tabs to view the other details of the route.





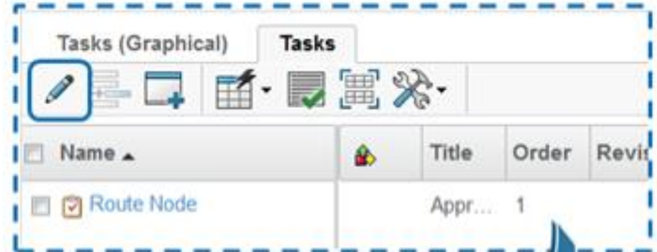
Adding Members to a Route

In the route's **Access** page, use the **Actions** menu to add members, roles or groups that are required to complete the route.



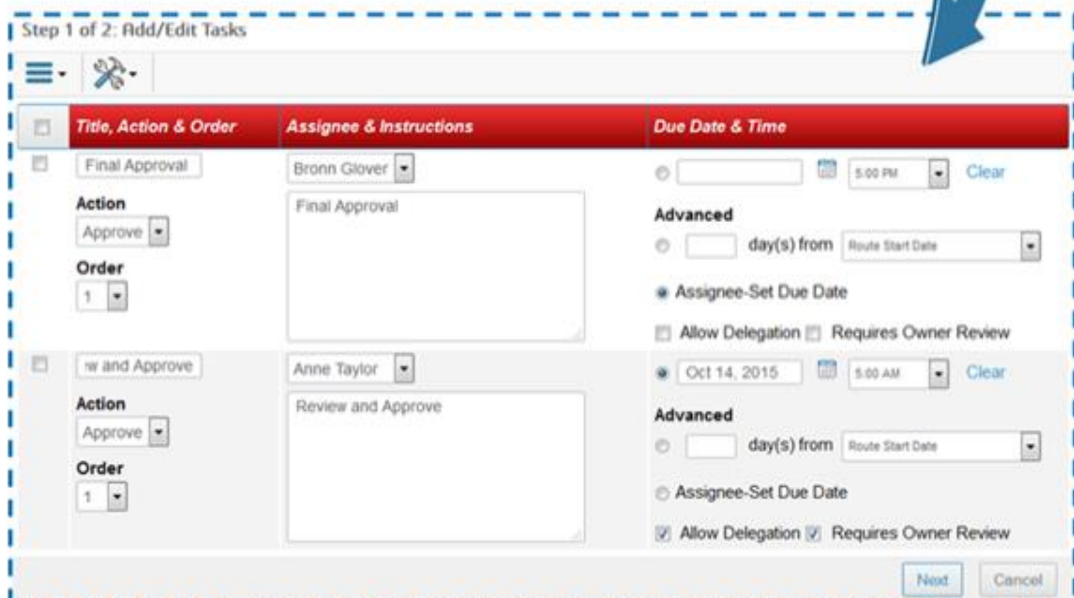
Adding Tasks to a Route (1/2)

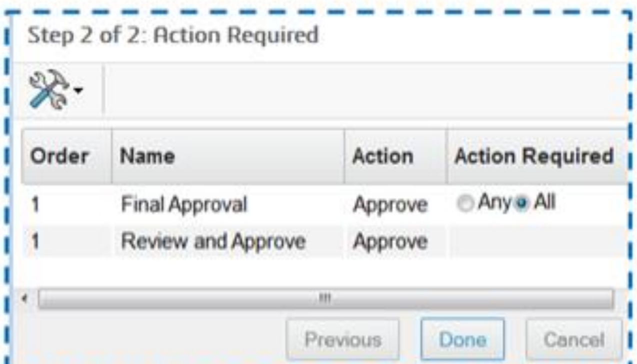
In the route's **Properties** page, click the **Tasks** tab. Click **Edit All** to define the tasks and the required actions for the route members.



You can select the **Allow Delegation** check box, so that the selected assignees can delegate their tasks to other members.

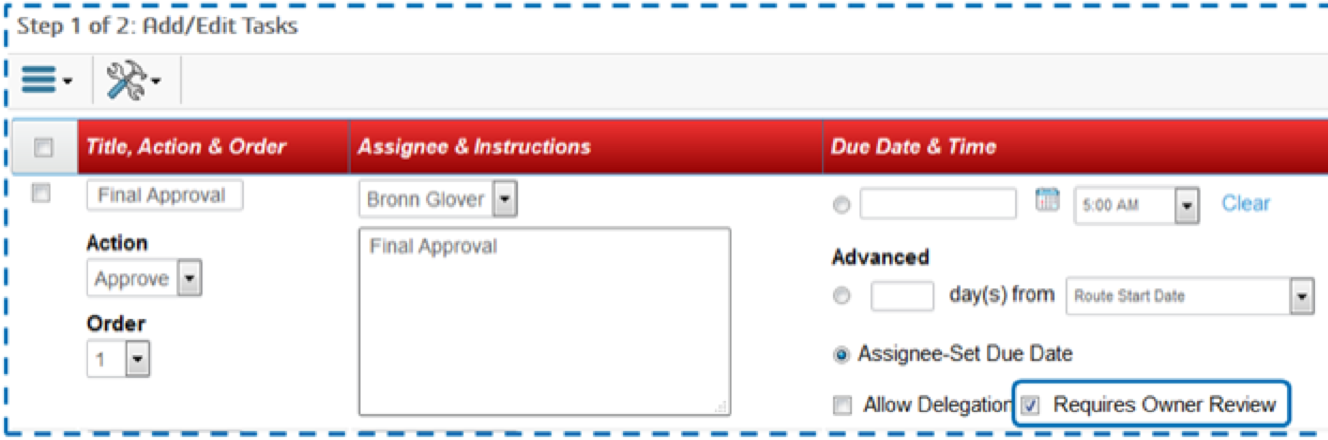
The **Assignee-Set Due Date** options enables the task assignees to specify a due date. If no due date is entered, the system does not display a status for the task.

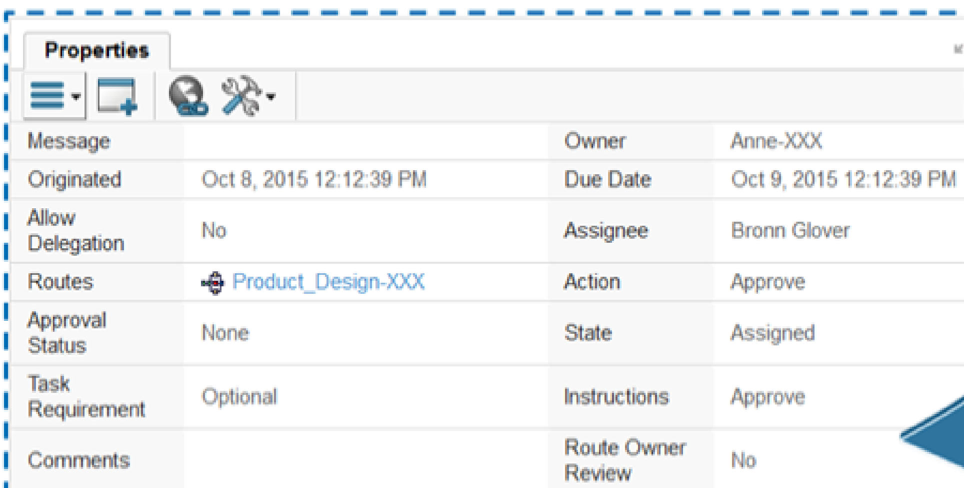


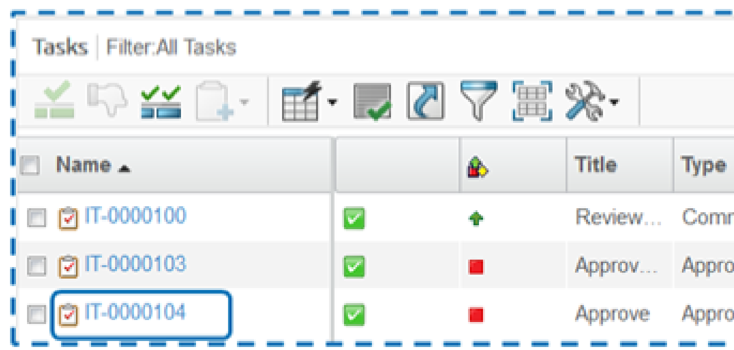


Adding Tasks to a Route (2/2)

If you select the **Requires Owner Review** option, the next task will be available to its assignee, only after the owner has reviewed and promoted the task.







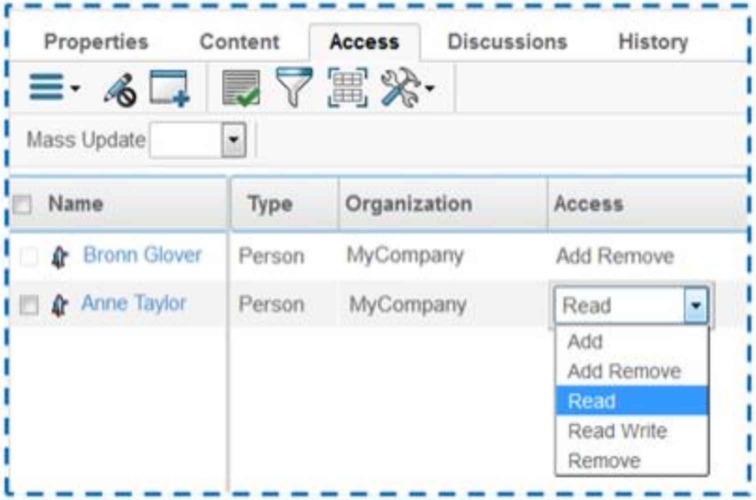
Use the filter as **View > Active**, to view these kind of tasks.

Defining Access Rights for the Routes

You can define the access rights to a route while adding the route members.

You can assign the following route task access privileges (these will be applied only to the route and not to the route's content):

- **Add:** Members have the permission to read the content and upload files for the route.
- **Add Remove:** Members have the access rights defined to add and remove the route content.
- **Read** (default): Every person, group and role included in the route is assigned at least the read access for the route. The members can view the category list and the **Properties** page for the route, including all the route tasks, history and accesses for the route, and can also subscribe to the route. The members can also view and download the route content.

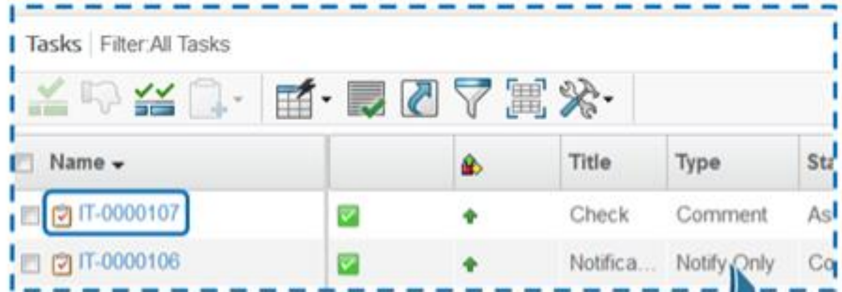


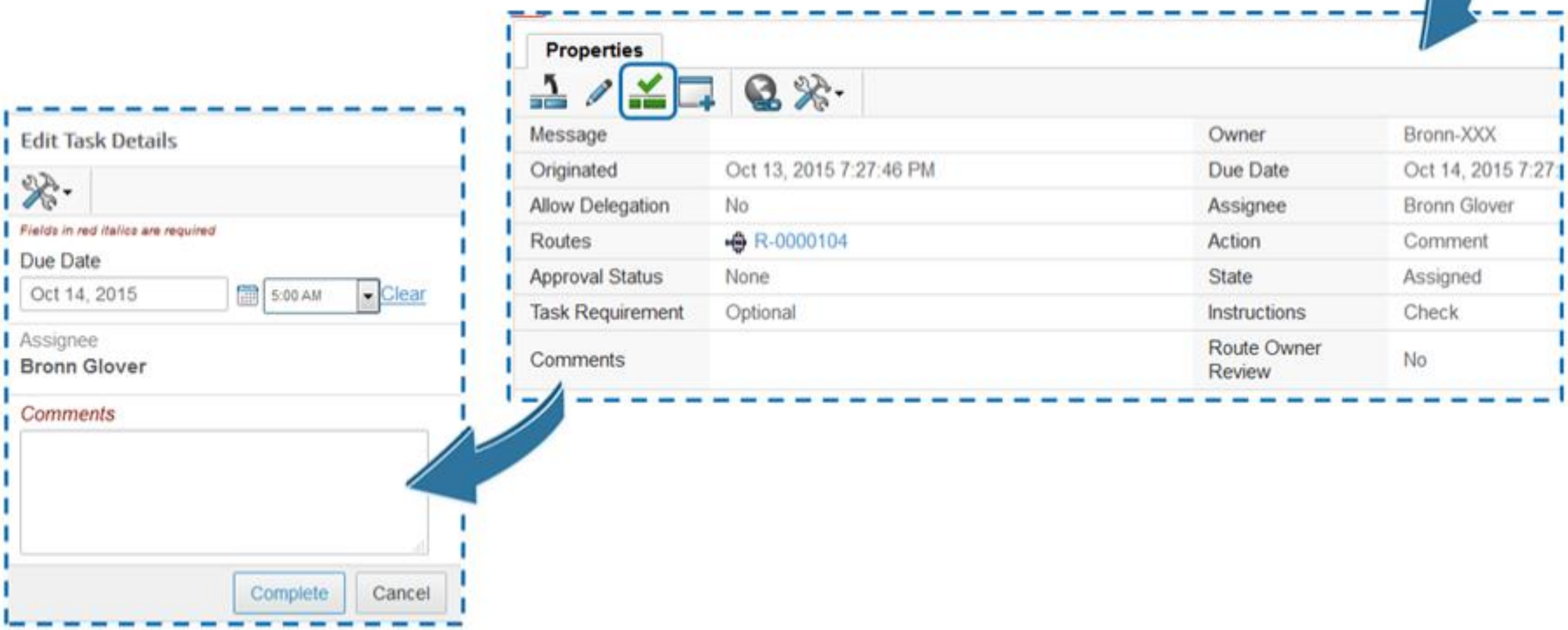
- **Read Write:** Members have the permission to read, modify and add content to the route.
- **Remove:** Members have the permission to read, write and remove content from the route.

Completing the Route Tasks (1/3)

When a route starts, the task notification is automatically sent to the first person on the route.

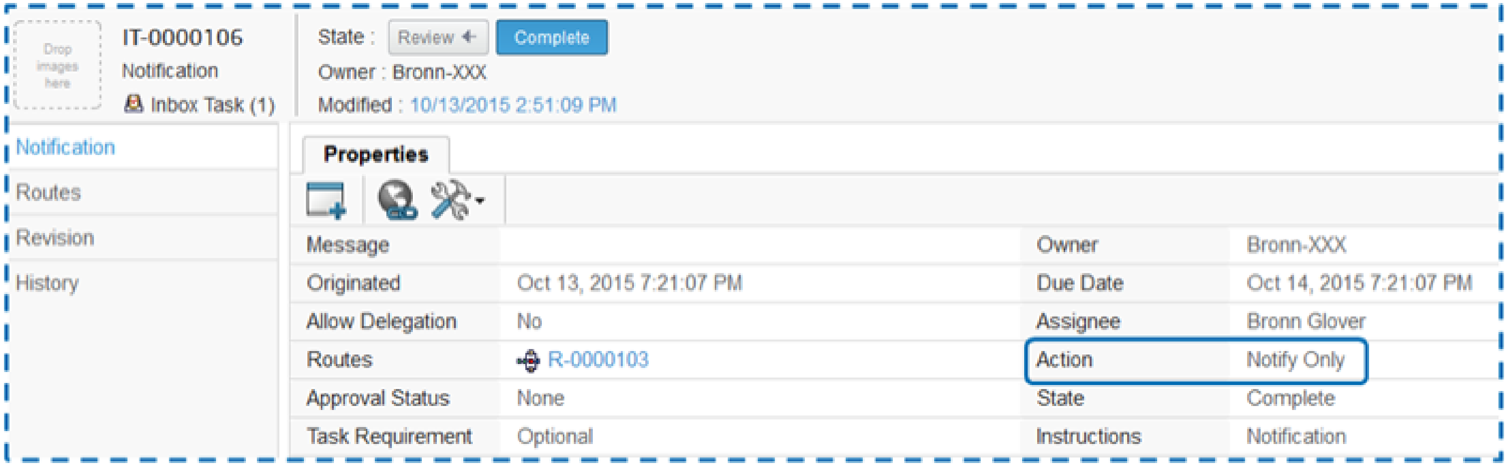
- For route tasks that have the **Action** field set to **Comment**, you must complete them by clicking the **Complete** button in the page toolbar and adding your remark in the **Comments** field.

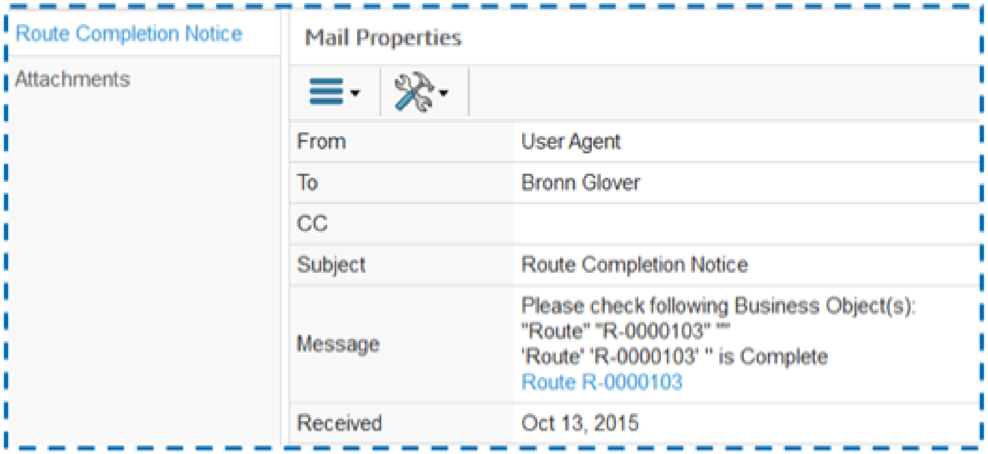




Completing the Route Tasks (2/3)

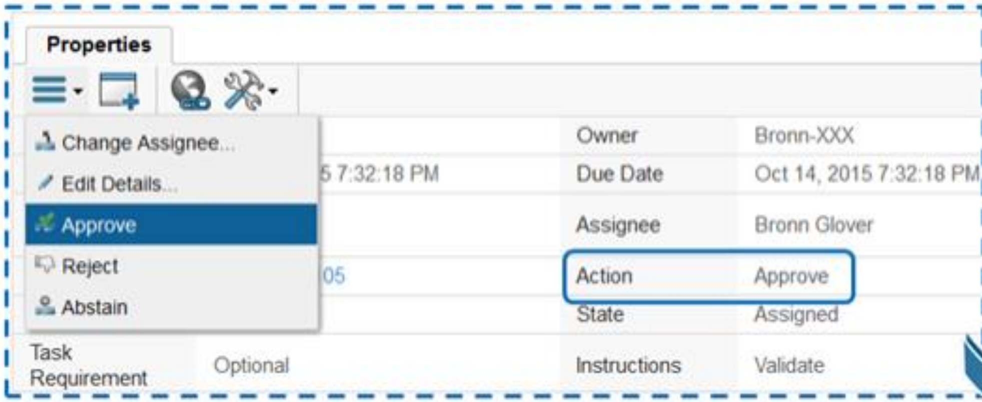
- For route tasks that have the **Action** field set to *Notify Only*, the assignee will receive an email notification in the *Messages* about the task and route details.

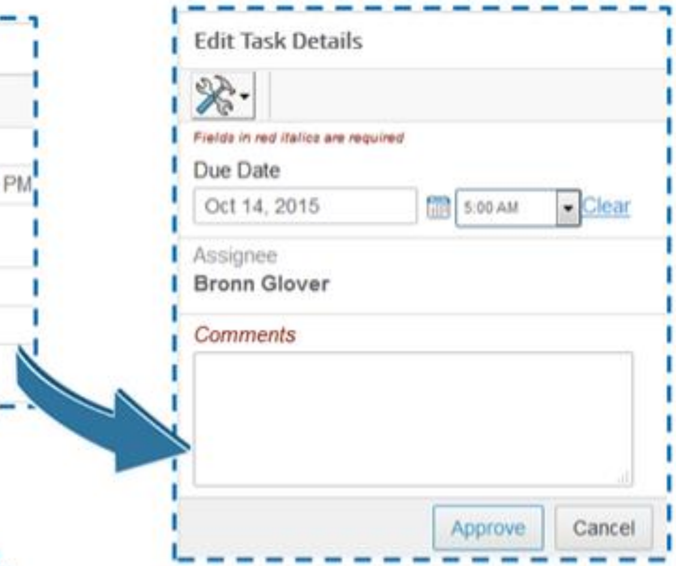




Completing the Route Tasks (3/3)

- For route tasks that have the **Action** field set to *Approve*, you must complete them by selecting the **Approve**, **Reject** or **Abstain** option in the page toolbar, and adding your remark in the **Comments** field.





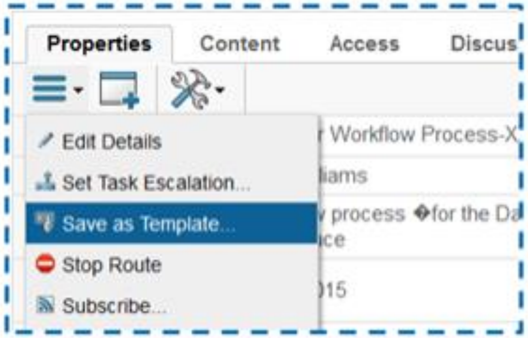
- The route will be stalled, till a particular route task is completed,

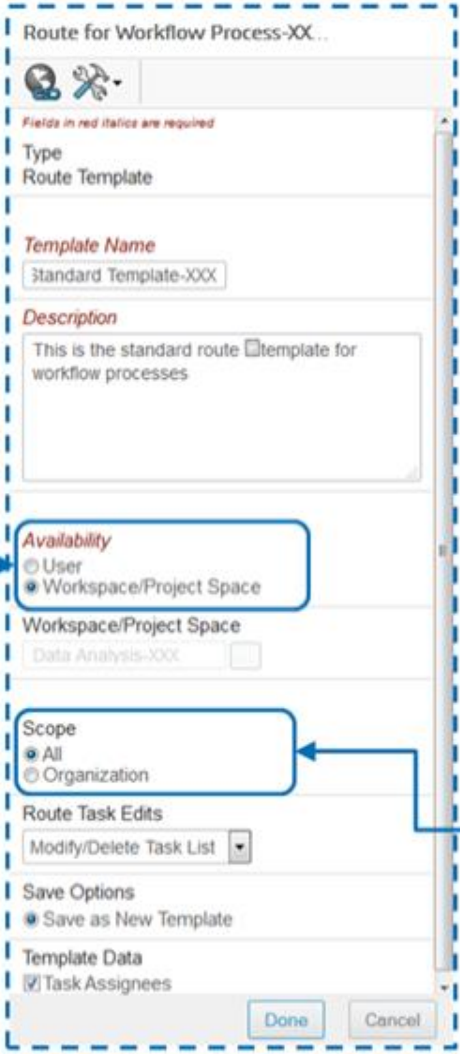
- As and when a member of the route completes the assigned route task, the subsequent route task is sent to the next member. If a member rejects a route task, the route stops and a notification is sent to the owner of the route, who can resume the route.

- If you abstain a route, it indicates that you decline from approving the information you have been requested to approve. If you complete a task by choosing **Abstain** for the **Approval Status**, the system continues the route normally.

Creating Route Templates (1/2)

You can create route templates and use them for creating routes with predefined tasks, assignees and other details. In the route's **Properties** page, select **Actions > Save as Template** to create a route template.





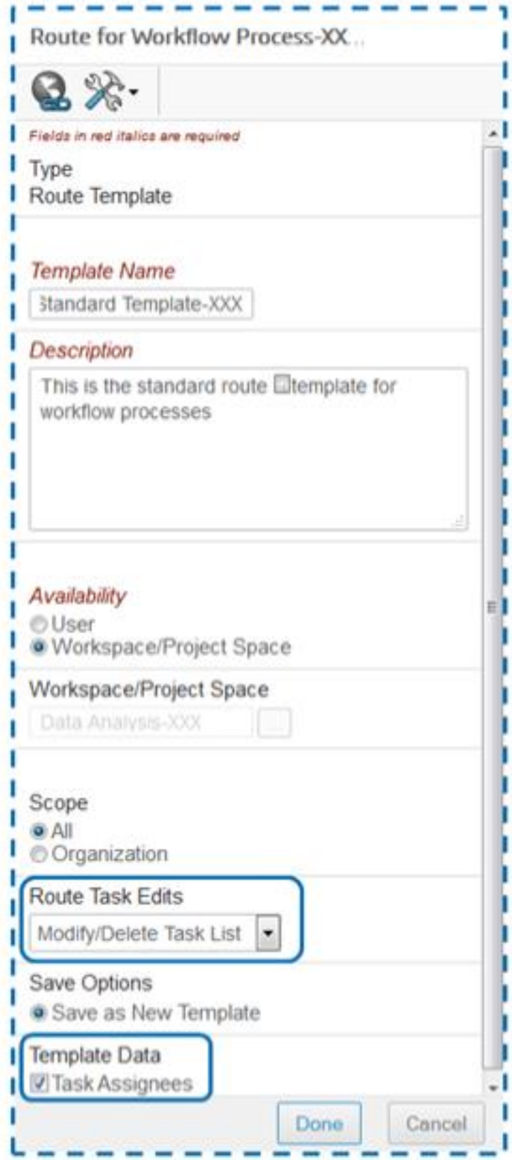
Identifies who can use the template.

Identifies whom you can add as route members.

Creating Route Templates (2/2)

- **Route Task Edits**: Defines the editing rights of the task list:
  - **Modify/Delete Task List**: Route owners can modify and delete any task, and add new tasks.
  - **Extend Task List**: Route owners must use the exact task list, and can append more tasks to it. They can also modify the tasks added by them.
  - **Modify Task List**: Route owners can change the information for template tasks, except the task name. The route owners can also add and modify new tasks.
  - **Maintain Exact Task List**: Route owners must use the exact task list. However, they can change the other details, including the task assignees.

- **Template Data**: Defines how the tasks can be assigned. If the **Task Assignees** check box is selected, any route created using this template will have the tasks assigned to the same users as that of the template. Otherwise the tasks will remain unassigned.

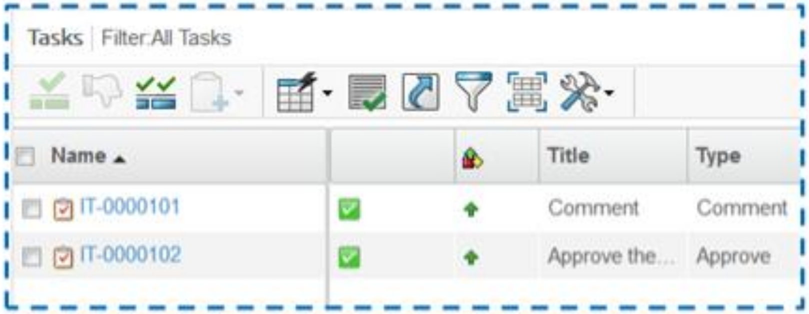


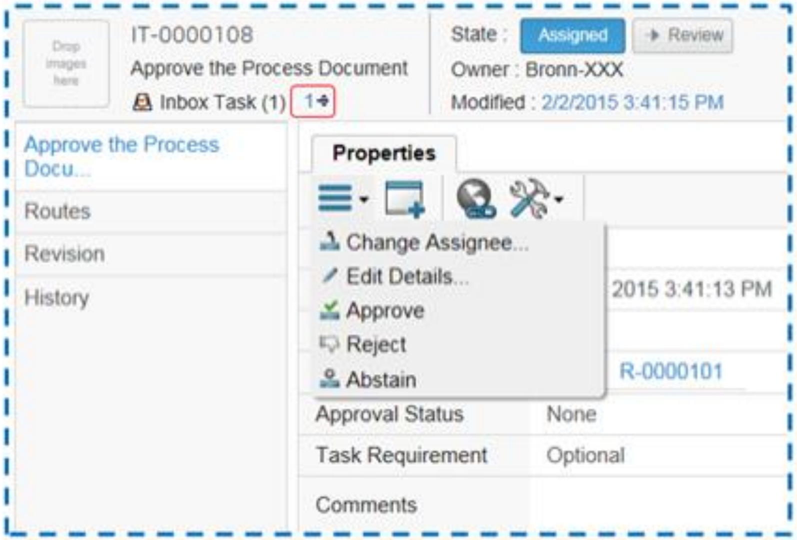
Summary

Working with Routes

- You can create a route for a list of tasks and assign the members to complete them. The assignees receive their tasks along with instructions that informs them about their actions.
- Tasks can be sequential or parallel, and more than one task can be active in a route.
- You can define the access rights to a route while adding the route members.
- As and when a member of the route completes the assigned route task, the subsequent route task is sent to the next member. If a member rejects a route task, the route stops and a notification is sent to the owner of the route, who has the privilege to ignore the rejection and resume the route.
- You can create route templates and use them for creating routes with predefined tasks, assignees and other details.

Managing the Assigned Tasks





Here are the topics to be covered:

1. *Getting Started with the ENOVIA Collaboration and Approvals App*
2. *Managing the Workspaces*
3. *Working with Routes*
4. **Managing the Assigned Tasks**
5. Working with Subscriptions
6. Managing Issues
7. Working with the Common Document Model

About Tasks (1/2)

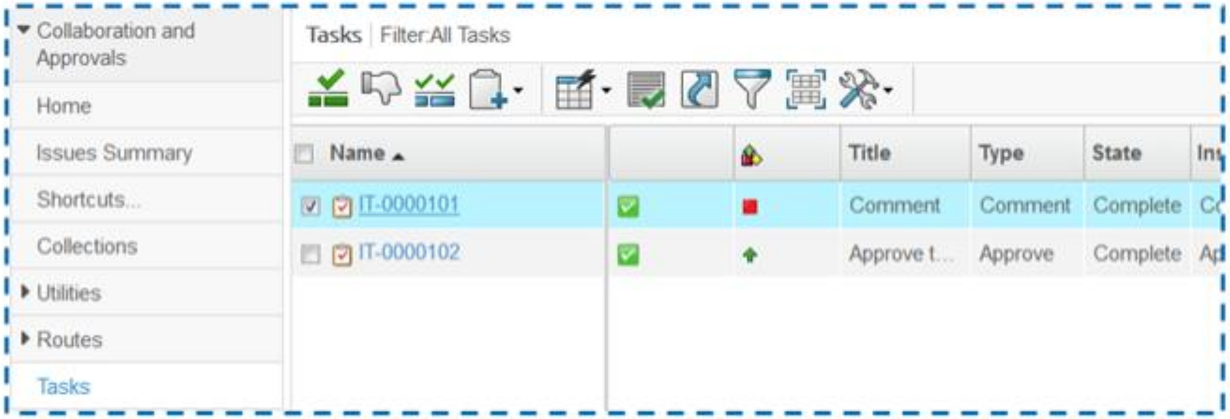
A task is an activity that you complete within a defined period of time. Tasks assigned to you can belong to a route or a work breakdown structure. You can complete the tasks assigned to you or delegate them to another user.

In the **My Desk** menu, select **Collaboration and Approvals > Tasks** to view the tasks assigned to you.

This page displays two types of tasks:

- **Inbox Tasks**: These tasks are assigned to you in a route. A new task assigned in a route will not be listed until the earlier tasks are done.

- **Project Tasks**: These tasks are required to complete a project. As a project member, you are assigned to the scheduled tasks by your Project Lead. These tasks are created in the **ENOVIA Project Management** app.



Note: In this course, we will discuss the inbox tasks only.

About Tasks (2/2)

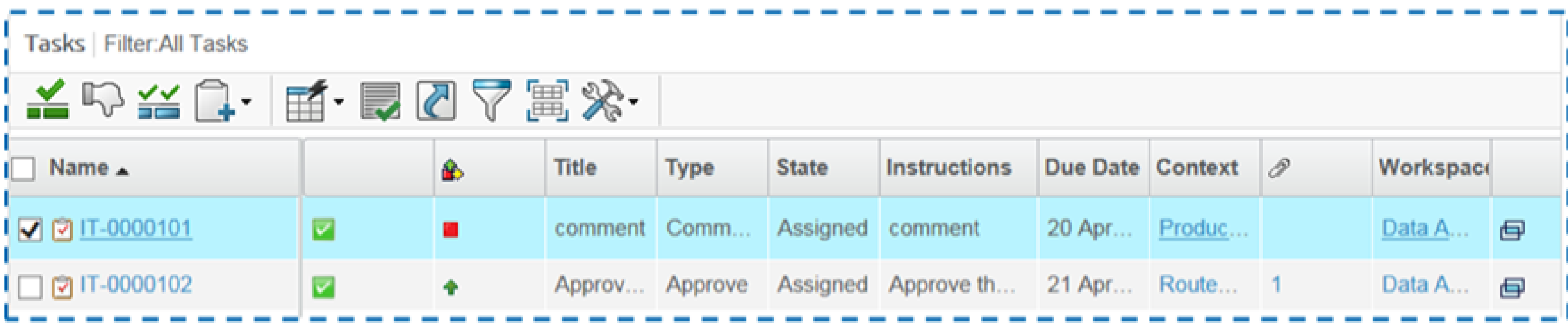
- The icons in the **Status** column show whether the task is on schedule or not.
  - While a green color icon indicates that the task is complete, yellow icon indicates that the task is not complete and the current date is up to 5 days later than the task's estimated finish date. A red icon means that the task is not complete and the current date is more than 5 days behind schedule. No icon indicates the task is on schedule.

- **Instructions** column indicates the instructions the task creator wrote for you.

- **Context** is the related object for a task. For route tasks, it displays the connected route object, and for schedule tasks it is the project.

- **Attachments** column displays the number of attachments for the task. All versions of files checked into the context object are counted.

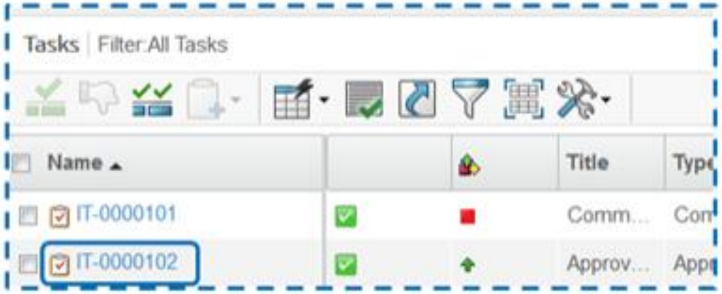
- **Workspace** column displays the workspace folder connected to the task. If the task is created from an app other than **Team Central**, there will be no workspace folder.

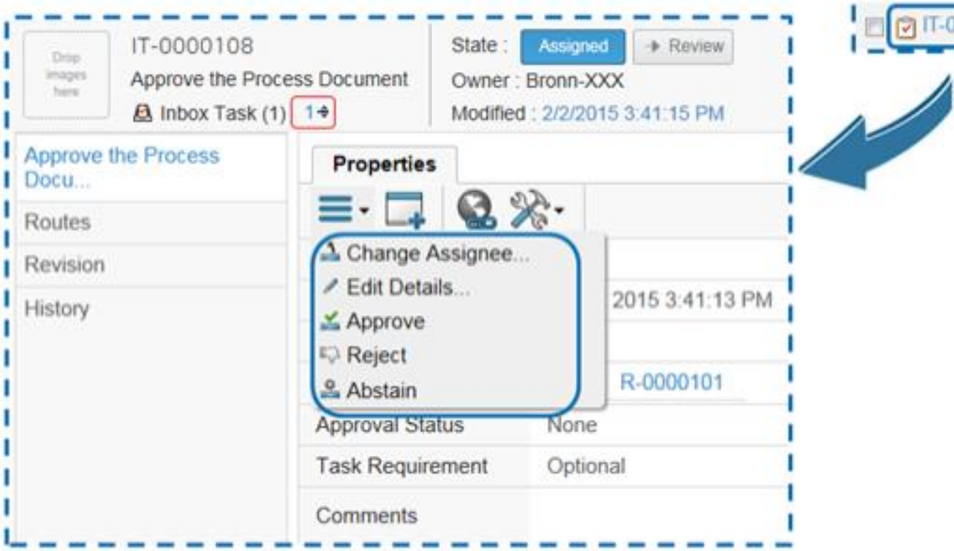


Viewing the Details of Inbox Tasks (1/3)

In the **Tasks** page, click a route task's name to view its **Properties** page. Using the **Properties** page you can view the details about a task, and use the **Actions** menu for:

- Changing the task assignee
- Edit the task details
- Approve, reject or abstain the task

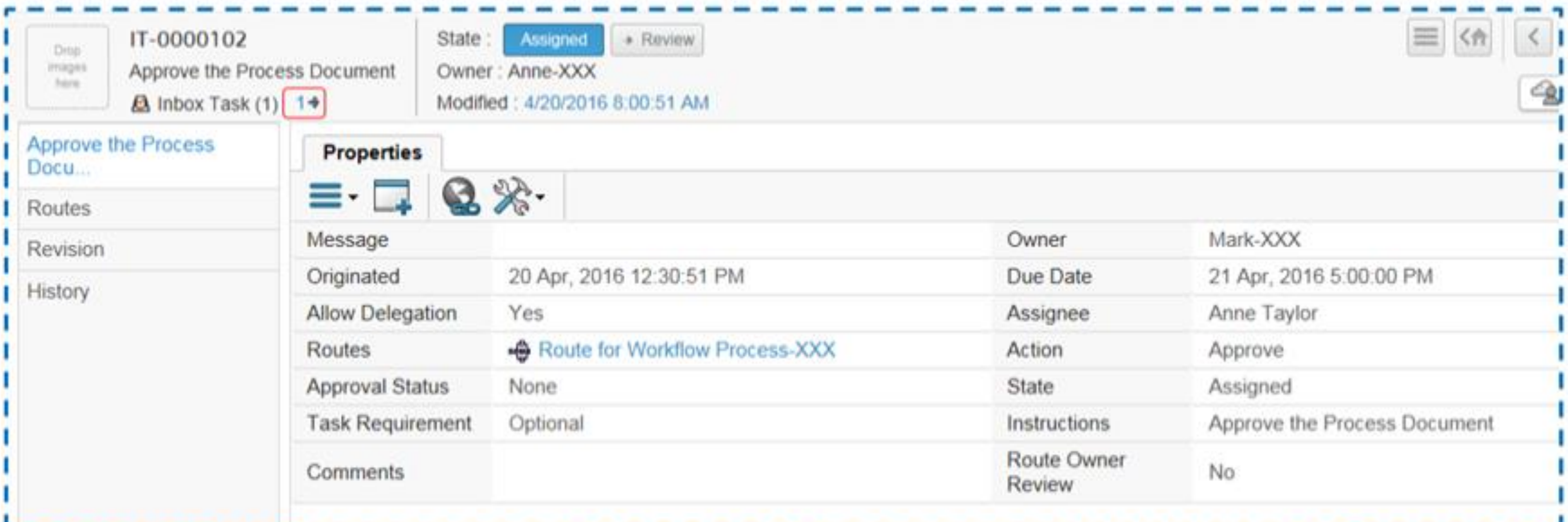




Note:
Change Assignee and **Edit Details** options are available only for the route owners.

Viewing the Details of Inbox Tasks (2/3)

- **Due Date**
  - The date and time by which, you have to complete the task. If you do not complete the task by this date, the task is marked as late.
  - If the route owner sets the task due/time by specifying the number of days following the route start date and the route is not yet started, the field indicates the number of days following the route start.
- **Allow Delegation** - If **Yes**, the assignee can delegate the task to another person.
- **Routes** - Name of the route that contains the task. To see details about the route, click its name.
- **Action** - The action that the assignee should perform to complete the task. It can be **Approve**, **Comment**, or **Notify Only**. If the action is to approve, you must specify an approval comment to complete the task. All actions except **Notify Only** require a comment to complete the tasks.



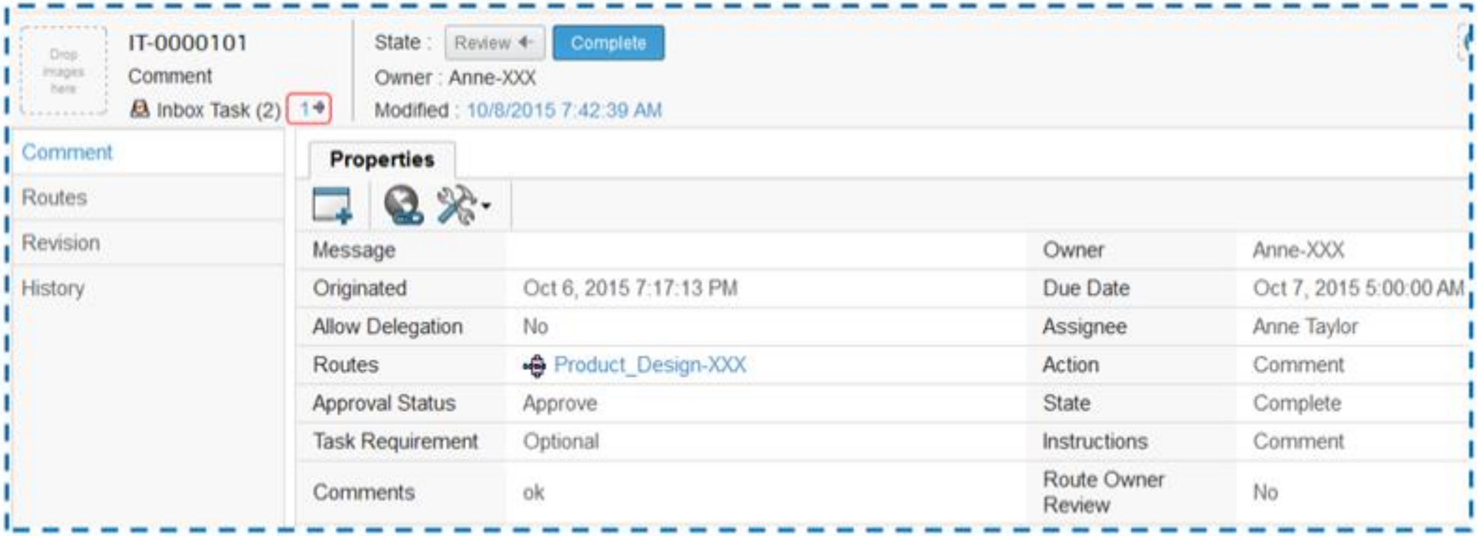
Viewing the Details of Inbox Tasks (3/3)

Approval Status

- It displays the approval status specified by a task assignee. It can be **Approve**, **Reject**, or **Abstain**. If the assignee specifies the status as **Approve** or **Abstain** and completes the task, the route continues as normal, and next task is active after completion of the current tasks. If the **Reject** option is selected, the route is stopped, and new tasks cannot be activated for the route. The route owner receives a notification about the rejection.

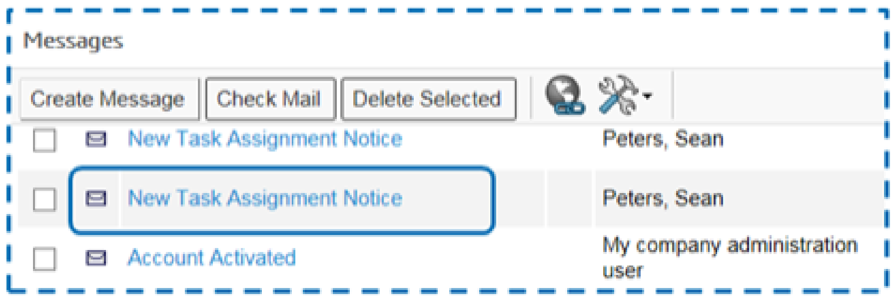
State

- For task assignees, the state can be **Assigned** or **Complete**. For a task owners, it can be **Pending**, **Assigned**, **Review** or **Complete**.



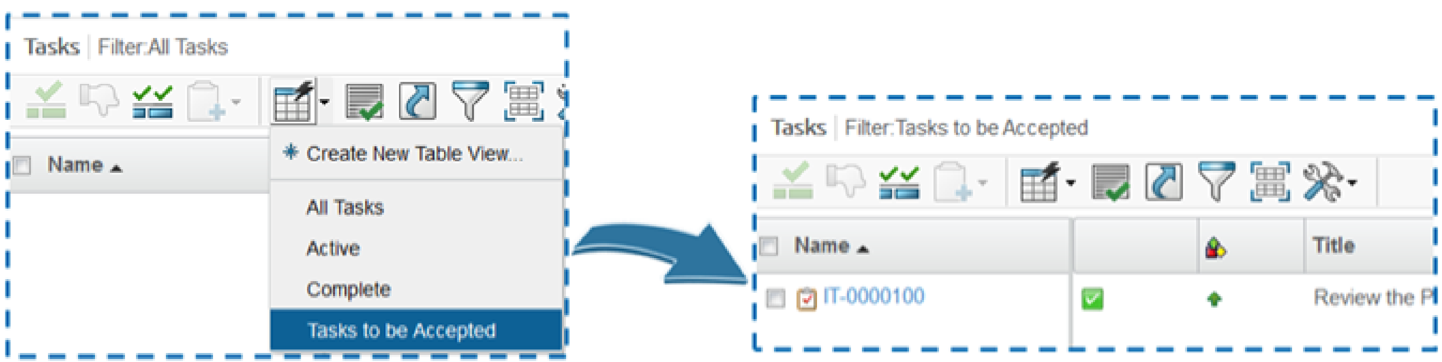
Accepting the Tasks (1/2)

When the route owner assigns a task to a group or role, the system notifies the respective members of that group or role.



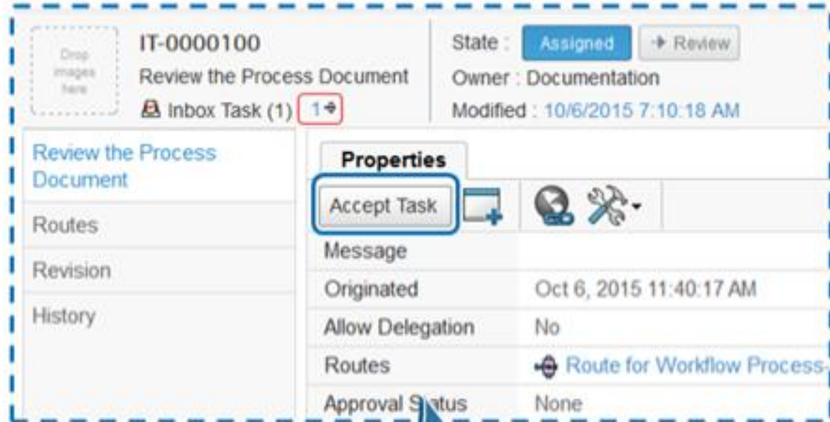
- One of the recipients must accept the task, before working on it. The first person who accepts the task becomes the new assignee and no one else can complete the task (unless the assignee delegates it to some other member).

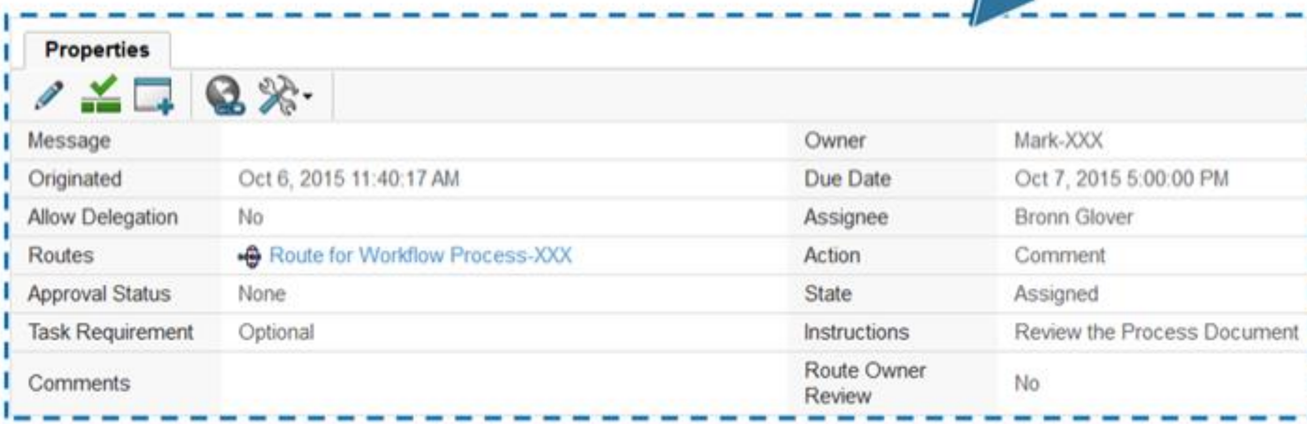
- In the **Tasks** page, use the **View** filter to display the tasks to be accepted.



Accepting the Tasks (2/2)

- In the task's **Properties** page, click **Accept Task**.
- After you accept, you can work on the task and complete it.
- You can also create sub-routes to complete your assigned tasks.

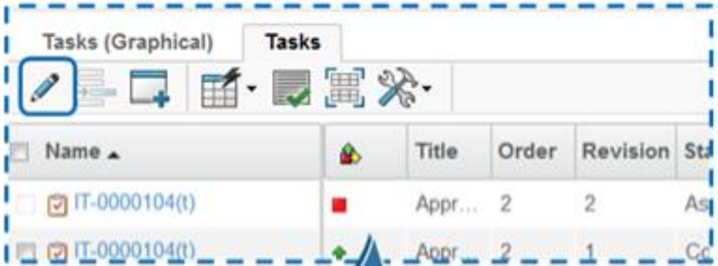


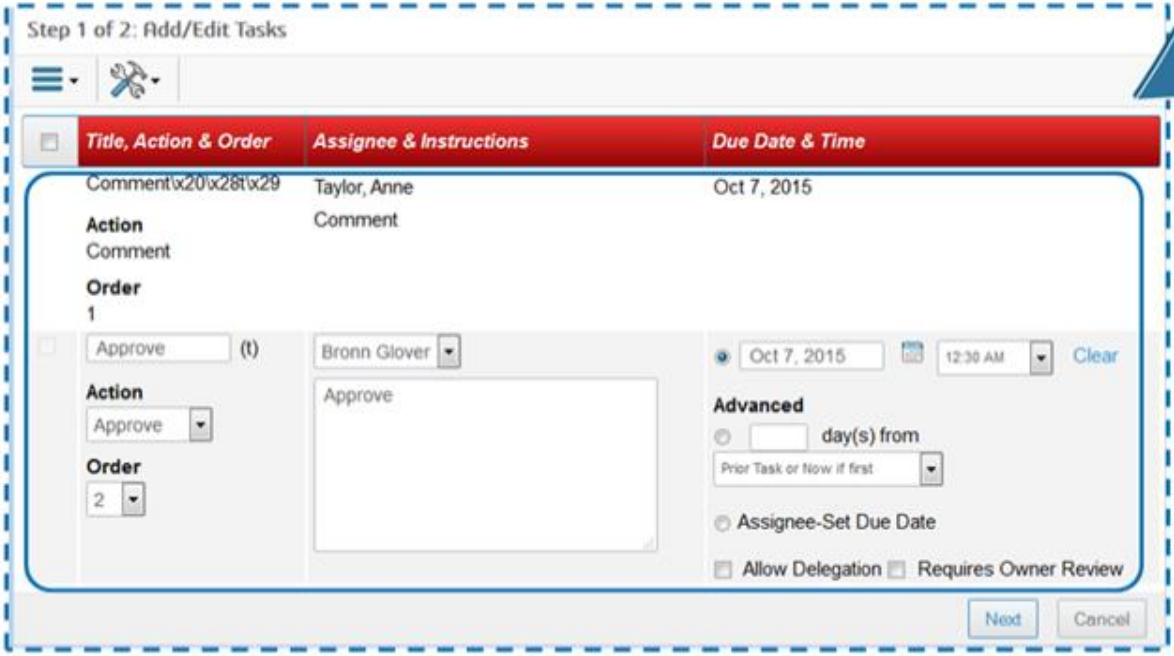


Completing the Tasks (1/2)

- The steps to complete a task, depend on the actions and instructions specified by the route owner. You must follow the instructions for the task and then mark it as complete.

- If the task owner or a task assignee creates sub-routes for the task, the sub-routes must be complete before completing the task.



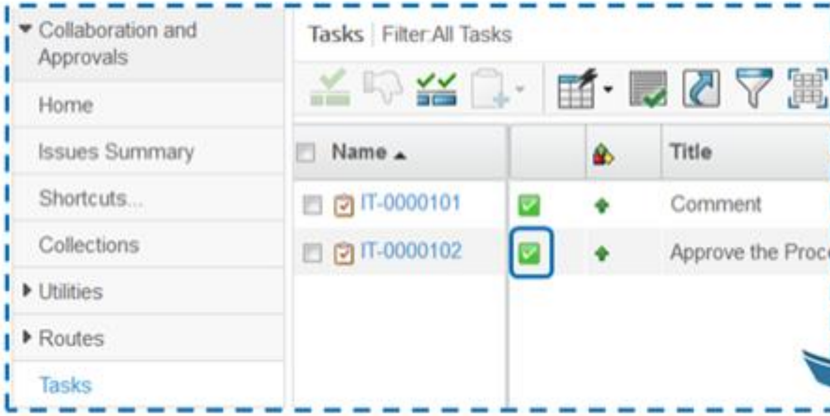


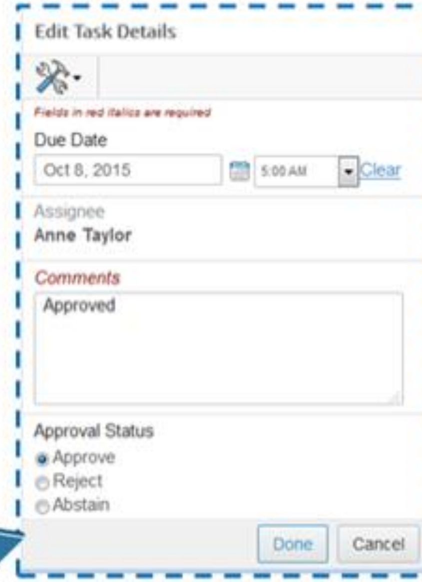
Note:
The Root Node(t) denotes that the task comes from a route template.

Completing the Tasks (2/2)

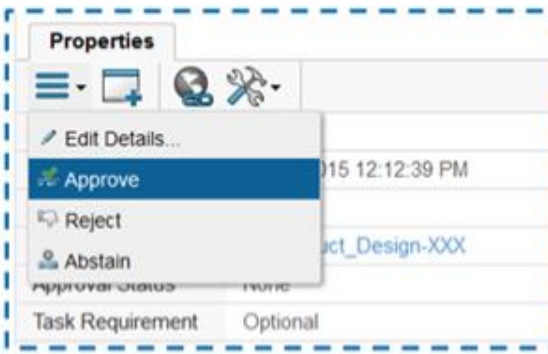
You can use either of the two ways to complete your tasks.

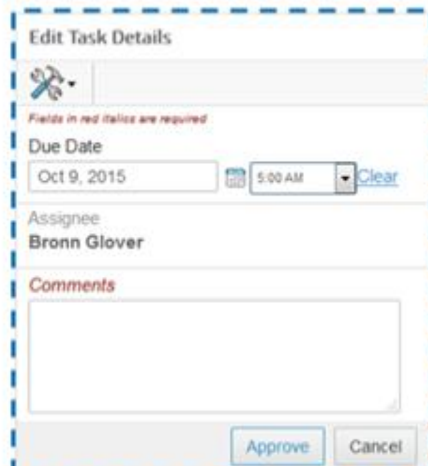
A. In the **Tasks** page, select the task and click **Complete**.





B. If you have instructions to approve a task; in the task's **Properties** page, select **Actions > Approve** to complete the task.

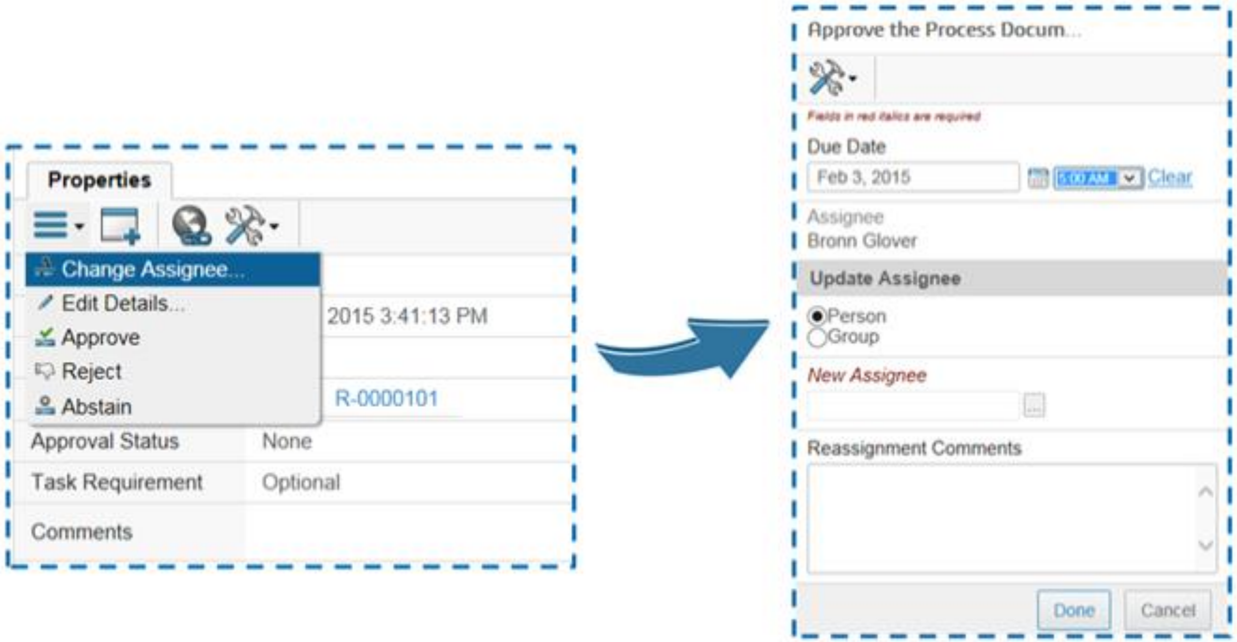




Reassigning the Tasks to Other Members

A route owner can reassign any active task to another person or group. An assignee who has the permission to delegate the task can also reassign it to another member.

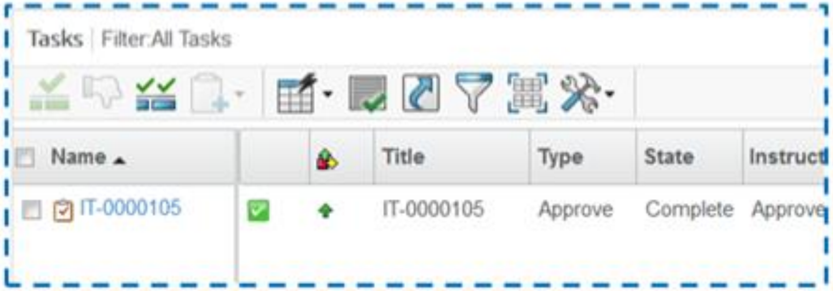
- The assignee inherits all the accesses that you grant for the route and its content, and receives the task notifications sent by the system.
- The reassigned accesses are removed once the route is completed.
- The original assignee's access to the route and content is restored after the route is complete.
- If you reassign a task for which you have created sub-routes, you remain the owner of the sub-routes. The new task assignee cannot complete the task until sub-routes are complete.



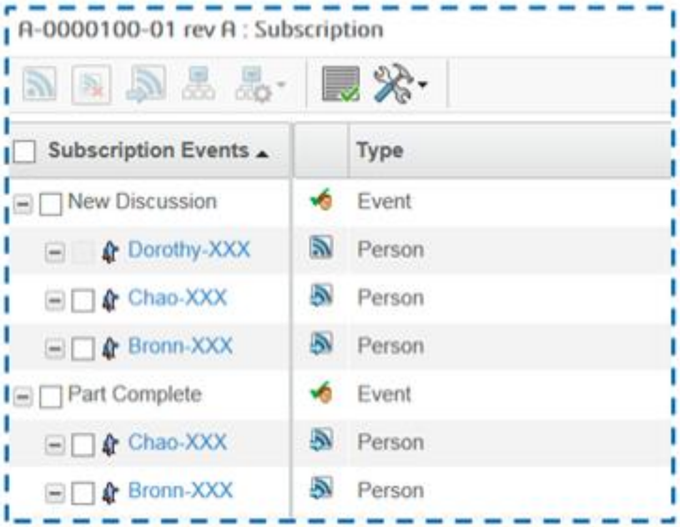
Summary

Managing the Assigned Tasks

- A task is an activity that you complete within a defined period of time or by a deadline. Tasks assigned to you can belong to a route or a schedule. You can complete the tasks assigned to you or delegate them to another user.
- You can complete or reject only the inbox tasks.
- The steps to complete a task, depends on the actions and instructions specified by the route owner. You must follow the instructions for the task and then mark the task as complete.
- A route owner can reassign any active task to another person or group. An assignee who has the permission to delegate the task can also re-assign it to another member.



Working with Subscriptions



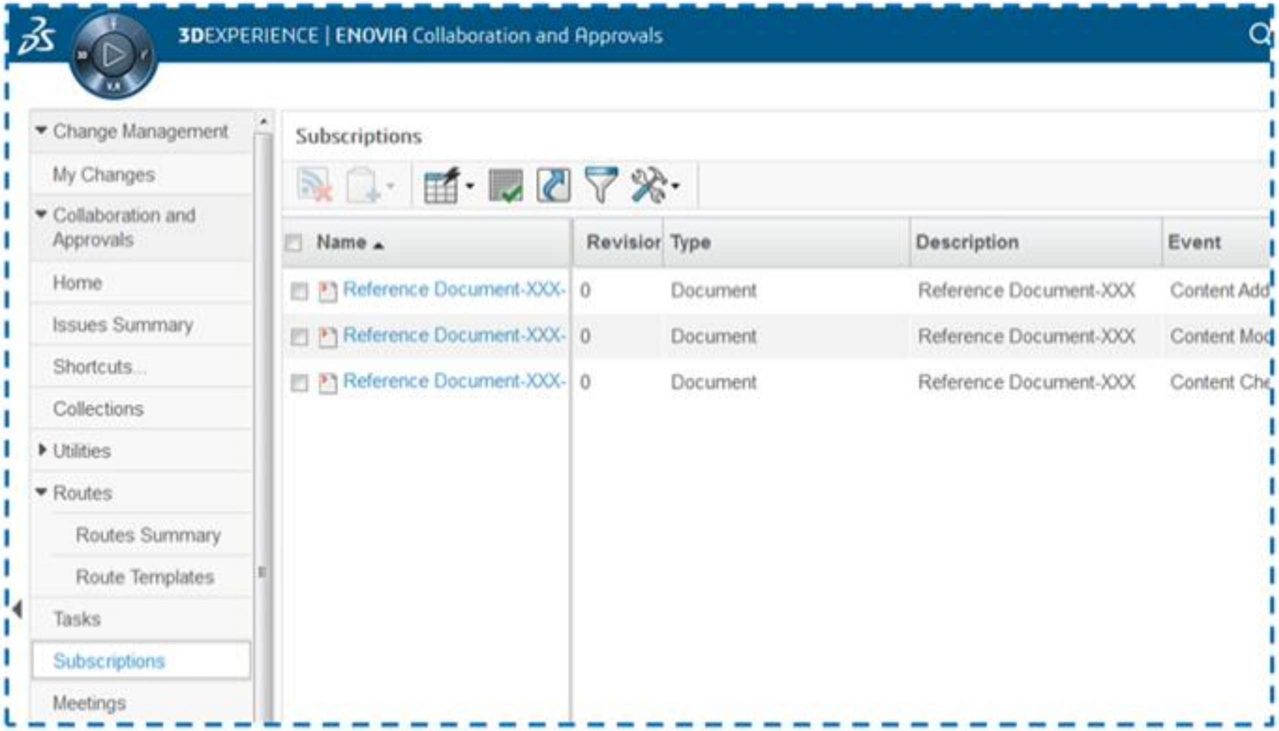
Here are the topics to be covered:

1. *Getting Started with the ENOVIA Collaboration and Approvals App*
2. *Managing the Workspaces*
3. *Working with Routes*
4. *Managing the Assigned Tasks*
5. **Working with Subscriptions**
6. Managing Issues
7. Working with the Common Document Model

About Subscriptions

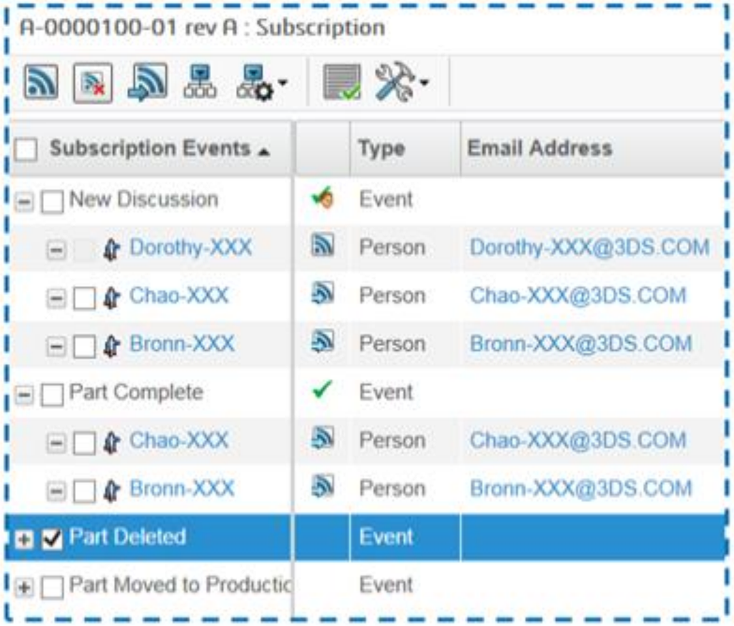
You can subscribe for updates in documents, discussions, routes and issues using the Subscriptions functionality. Depending upon the installed apps, you can subscribe to their corresponding objects.

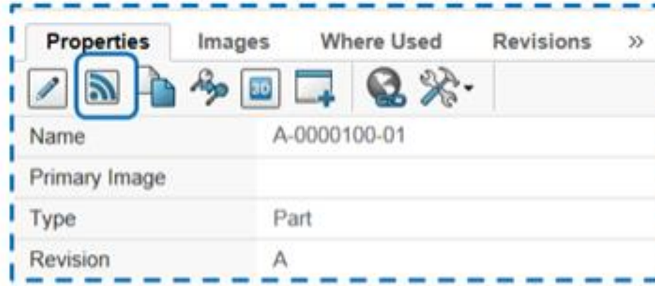
- In the **My Desk** menu, select **Collaboration and Approvals > Subscriptions** to access the **Subscriptions** page. You can view the existing subscriptions on this page.
- The **Type** column displays the type of objects for which you have subscribed.
- The **Event** column displays the type of event for which you want to be notified.



Subscribing to Object Events

Subscribing to an object allows you to receive notification about the selected events for that object. You can subscribe to events, un-subscribe from the events and push subscriptions to other members using the **Subscriptions** page.





Icon	Description
	Subscriptions exist for this event, but you are not subscribed.
	You are subscribed to this event (others might also be subscribed).
	You have subscribed yourself to an event.
	You have pushed the subscription to a person.

Icons on the subscription page

Note:
The **Subscription** page depends upon the type of object.

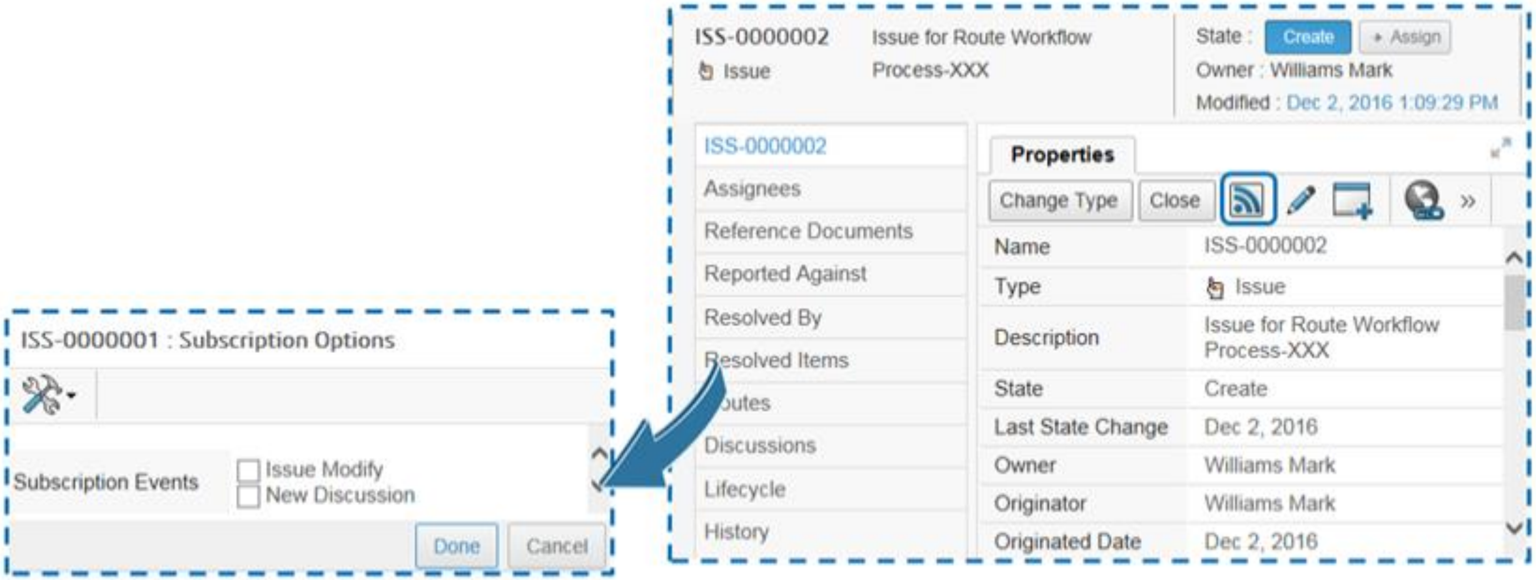
Selecting the Subscription Events for Routes

You can select the subscription options, for which you want to be notified. The table below, explains the events for a route that you can subscribe to. Subscriptions cannot be made for the routes in the **Complete** state.

Event	Notification Sent When
Route Started	A route is started
Content Added	A route member or the route owner adds content to the route. This does not include updated versions of files already in the route.
Content Removed	A route member or the route owner removes content from the route
Task Completed	A route member completes a task
Route Completed	The route has completed all its tasks
New Discussion	Someone creates a discussion for the route

Selecting the Subscription Events for Issues

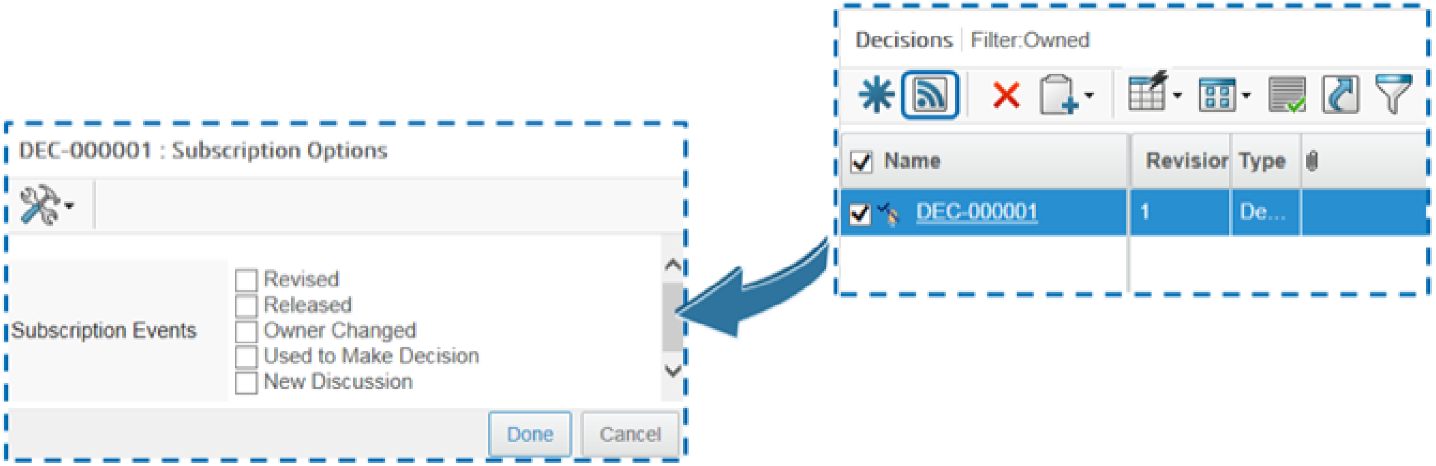
You can subscribe to an issue, to be notified when anyone makes a change to the issue. The **Subscribers** field on the issue's **Properties** page lists the people who have subscribed to the specific issue.



Event	Notification Sent When
Issue Modify	A change is made to the issue.
New Discussion	Someone creates a new discussion for the issue.

Selecting the Subscription Events for Decisions

Subscribing to a decision allows you to receive notification about the selected events for the decision.

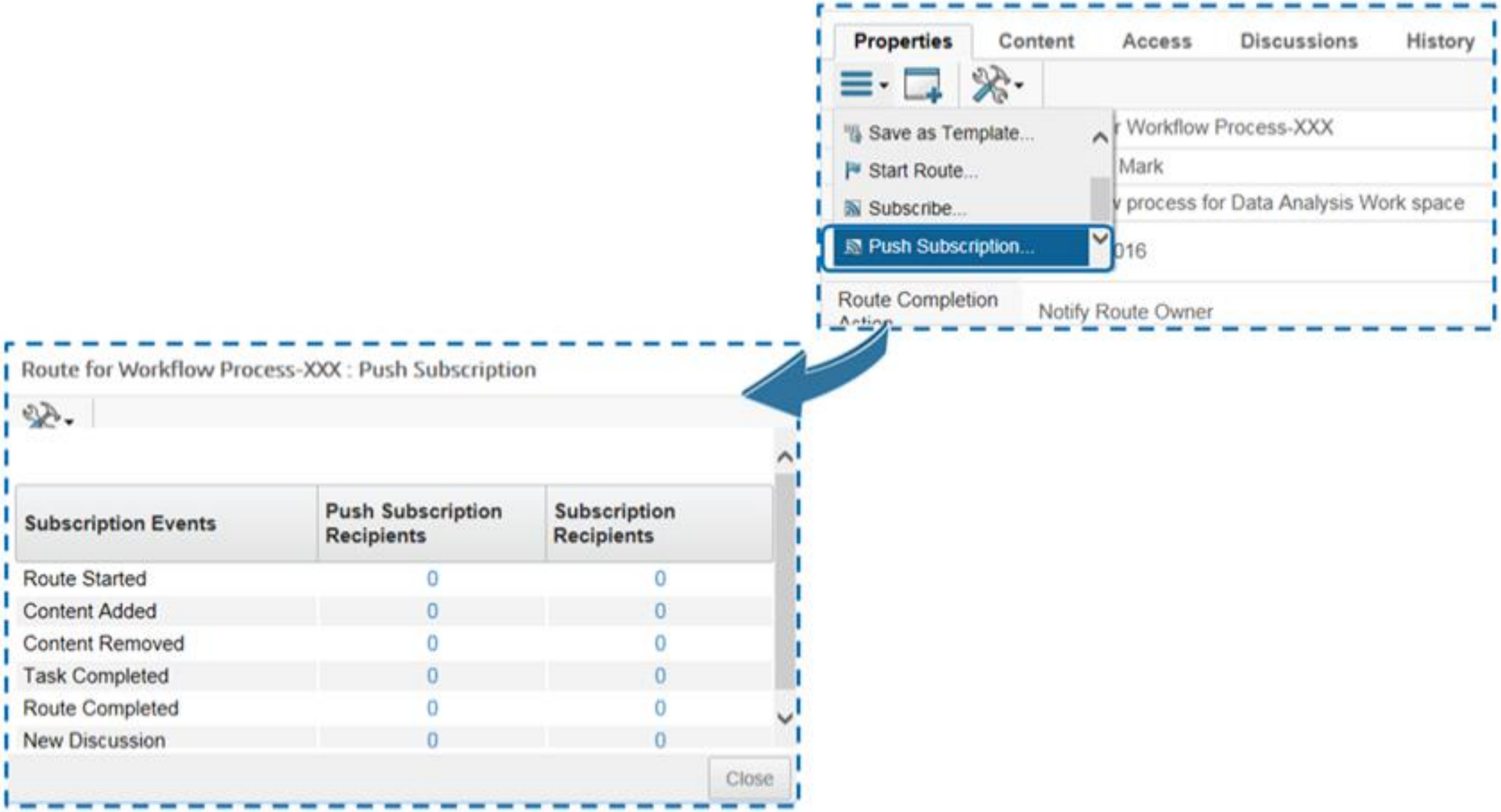


Event	Notification Sent When
Revised	A new revision of a decision is created.
Released	A decision is promoted to the Release state.
Owner Changed	The owner of the decision is changed.
Used to Make Decision	The decision is attached to an object that it relates to.
New Discussion	A discussion related to the decision was created.
Revised	A new revision of a decision is created.

Pushing Subscriptions to Members

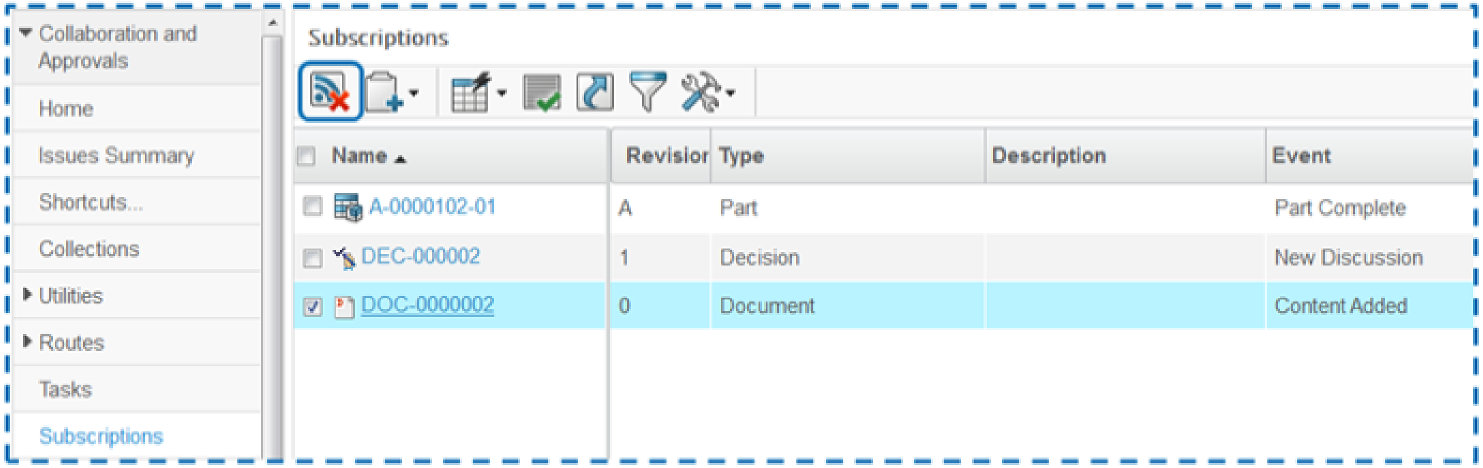
You can push a subscription for some objects to other members, who will receive notifications about the events.

Typically, supervisors push subscriptions to the people who report to them. However, any user with an Employee role can push subscriptions for an object to other members. You cannot push subscriptions to a role.



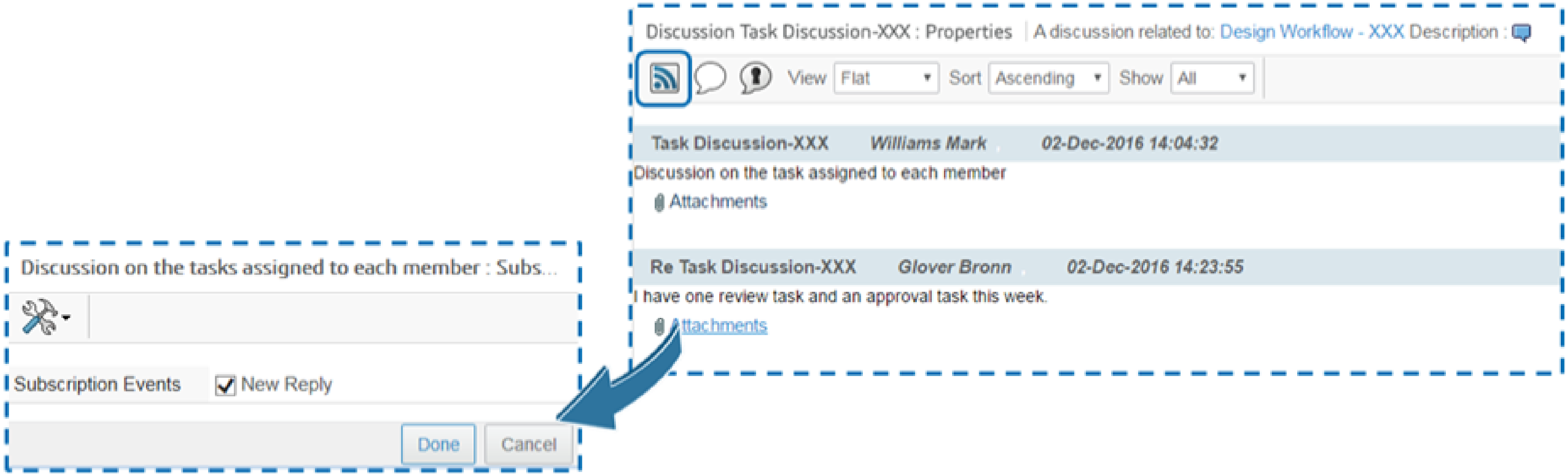
Unsubscribing from Object Events

If you do not want to get updates on particular events, you can select those events on the **Subscriptions** page, and un-subscribe from them.



Replying to a Subscription Notification (1/4)

You can use the **Discussions** page to reply to the subscriptions.
In the discussion's **Properties** page, click **Subscribe** to get updates on the discussion.



After you have subscribed yourself; whenever anyone replies to the message thread, you can view and reply the message using any of the three pages (explained in succeeding slides):

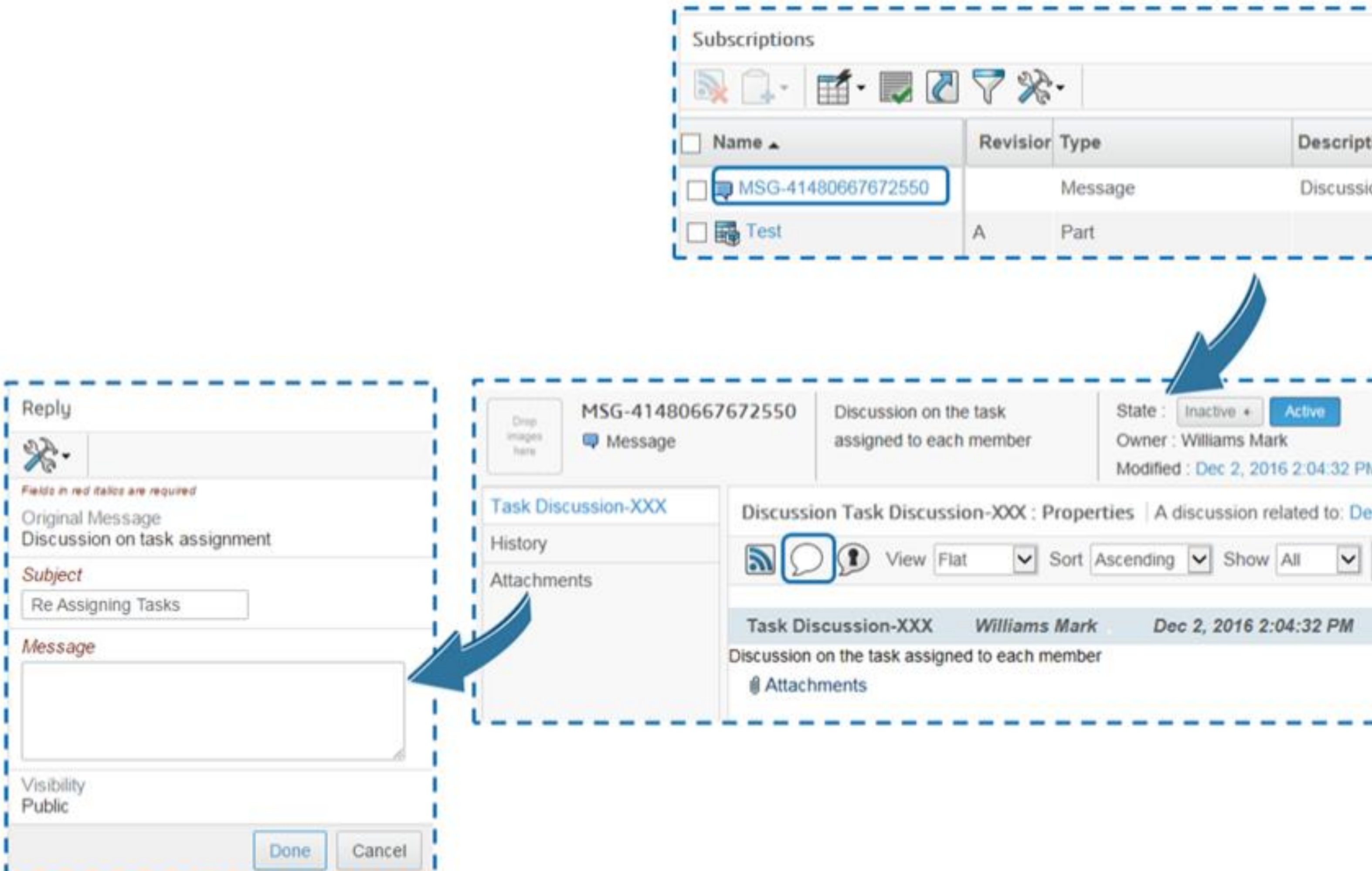
A. **Subscriptions**

B. **Discussions**

C. **Messages**

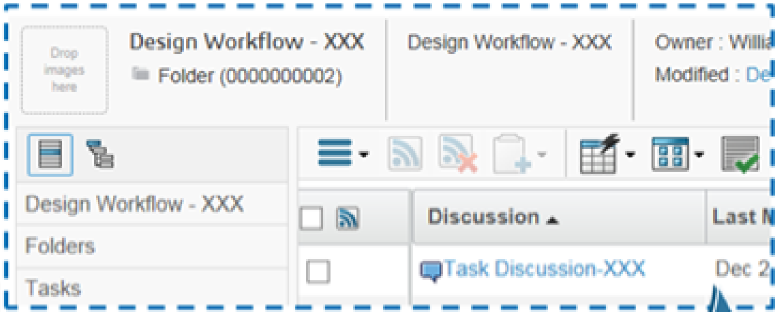
Replying to a Subscription Notification (2/4)

A. On the **Subscriptions** page, click the message name to view the discussion's **Properties** page. You can use the **Public Reply** or **Private Reply** options for replying to the message/discussion thread.

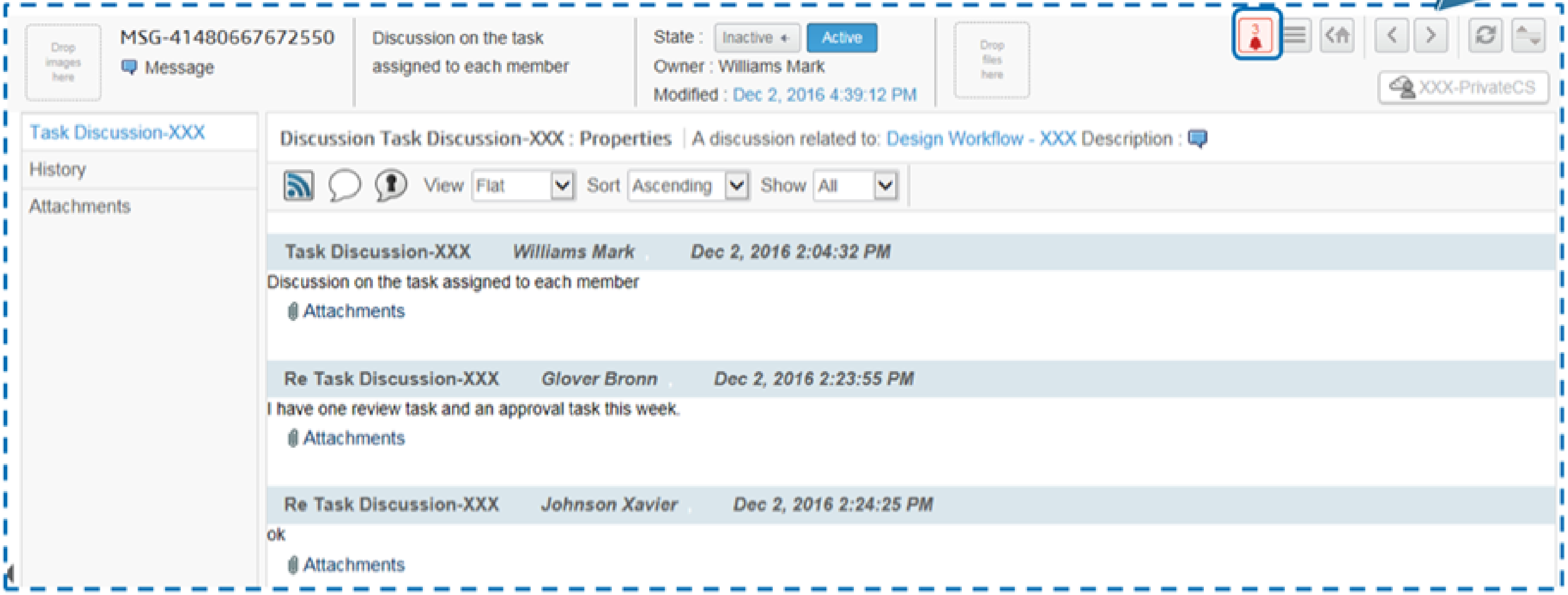


Replying to a Subscription Notification (3/4)

B. On the **Discussions** page, click the discussion name to open its **Properties** page.

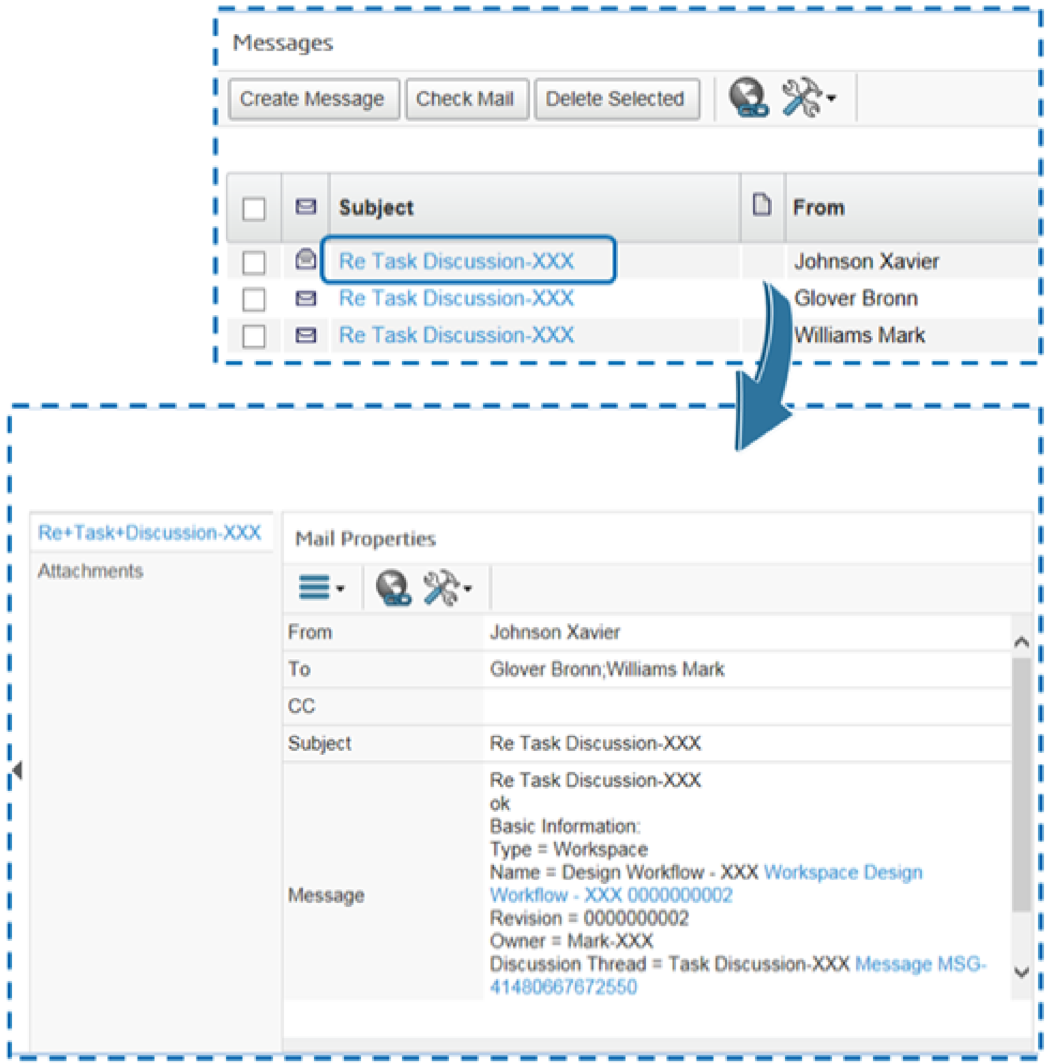


C. On the page header, click the Icon mail.



Replying to a Subscription Notification (4/4)

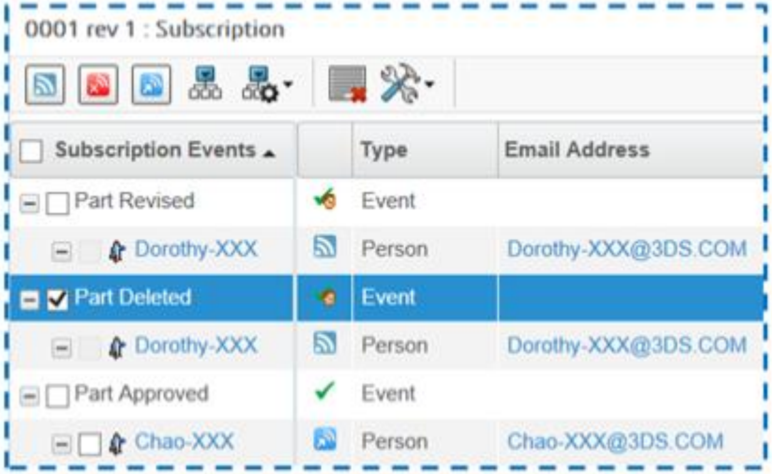
D. On the **Messages** page, click the subject name to view the **Mail Properties**.



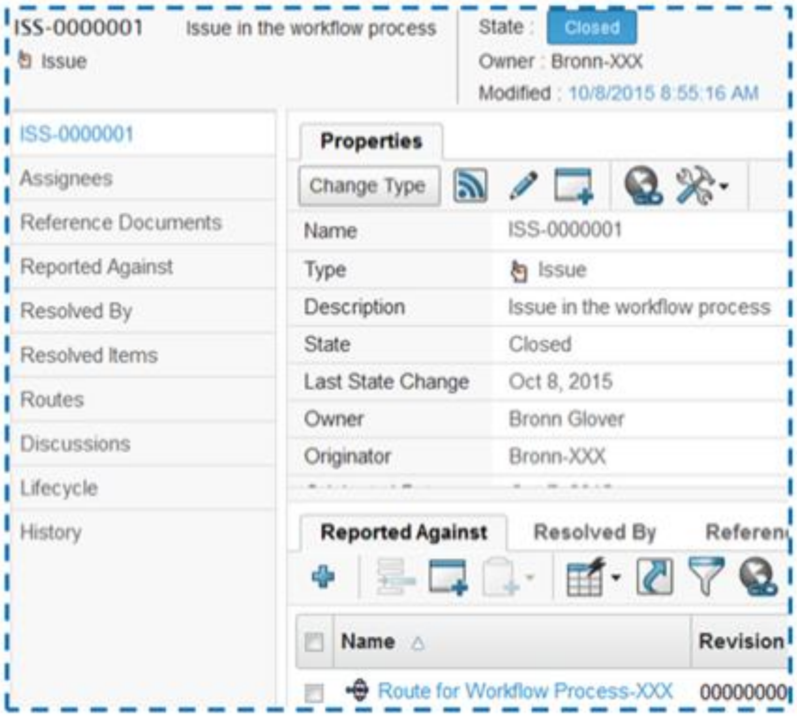
Summary

Working with Subscriptions

- You can subscribe for updates in documents, discussions, routes and issues using the **Subscriptions** functionality. Depending upon the installed apps, you can subscribe to their corresponding objects.
- You can subscribe to events, un-subscribe from the events and push subscriptions to other members using this page.
- You can push a subscription for some objects to other members, who will receive notifications about the events.
- If you do not want to get updates on particular events, you can select those events from the **Subscriptions** page and un-subscribe them.
- You can use discussions to reply for the subscriptions.



Managing Issues



Here are the topics to be covered:

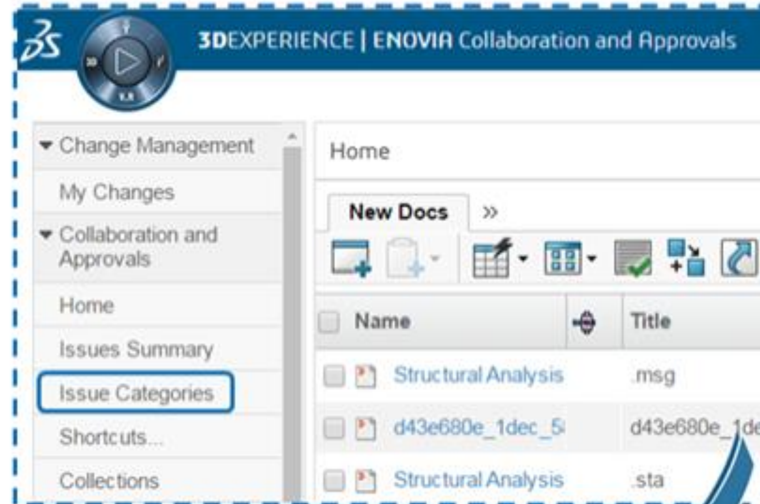
1. *Getting Started with the ENOVIA Collaboration and Approvals App*
2. *Managing the Workspaces*
3. *Working with Routes*
4. *Managing the Assigned Tasks*
5. *Working with Subscriptions*
6. **Managing Issues**
7. Working with the Common Document Model

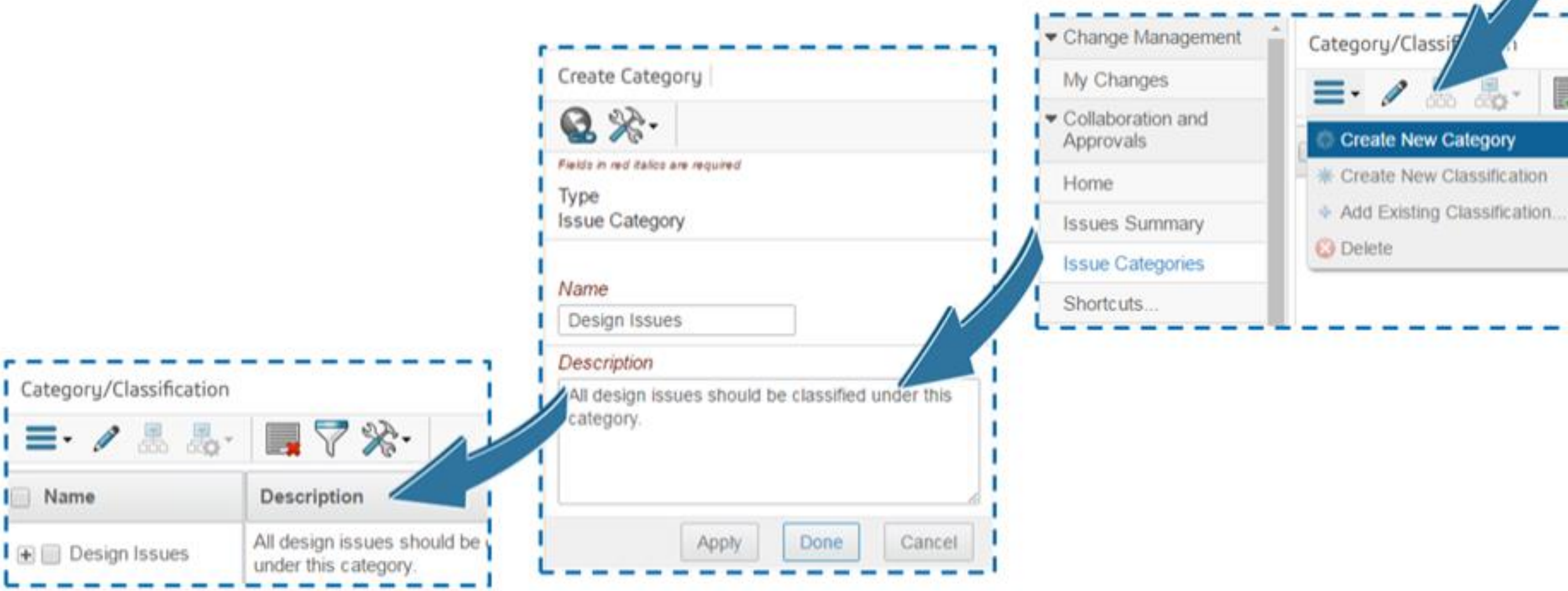
About Issues (1/5)

You can create and manage categories and classifications for your organization.

Issue Category and **Issue Classification** can be used effectively in organizing/grouping issues by functional or technical categories.

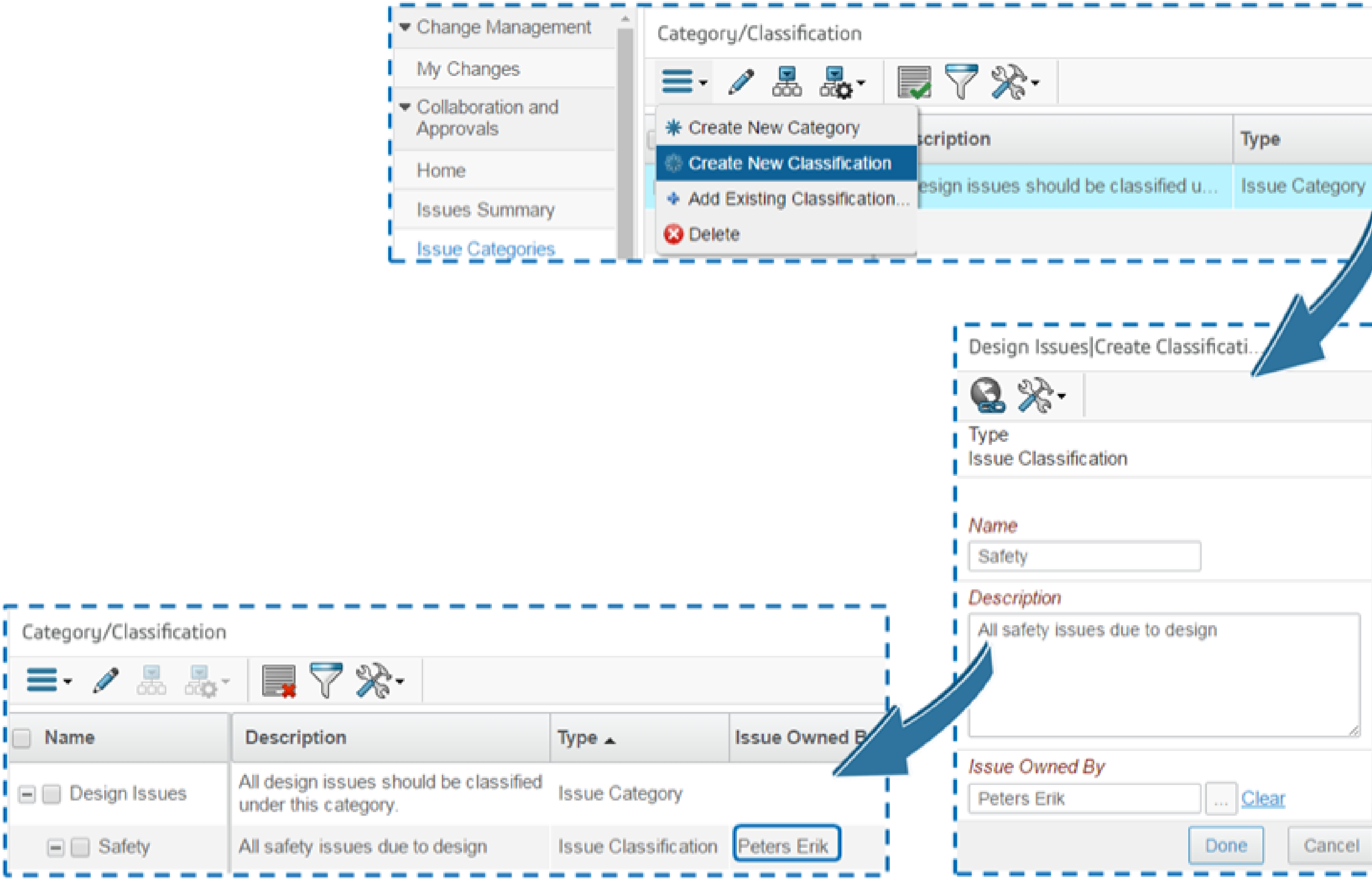
Only a person in the role of an *Owner* can create an issue category.





About Issues (2/5)

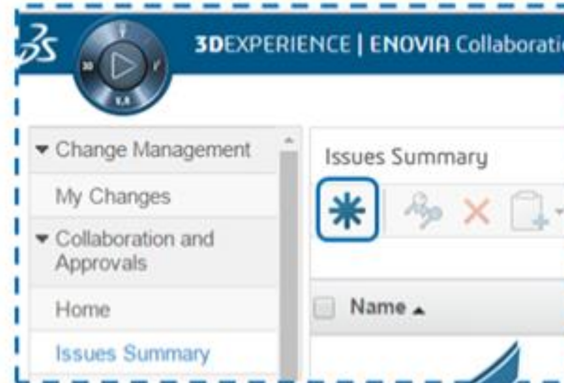
You can create a new classification object for an issue category.

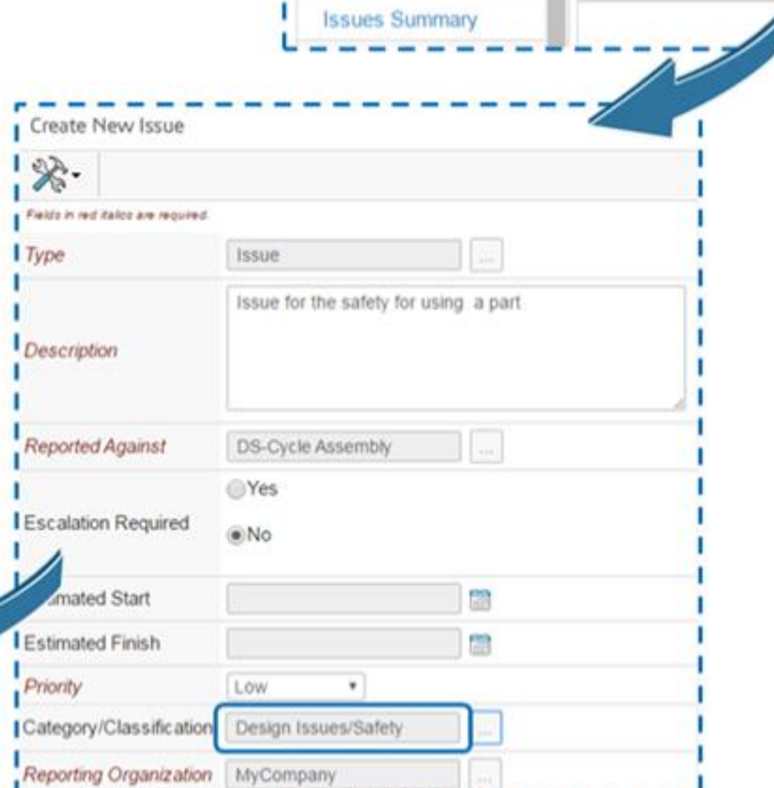


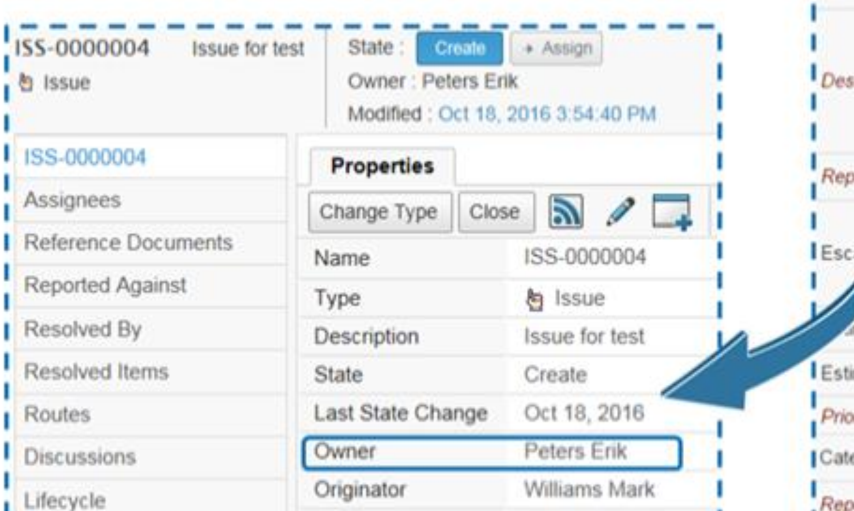
About Issues (3/5)

If you create an issue with a particular issue category/classification (owned by another user), then the owner of the issue becomes the owner of the issue category/classification.

For example, if you log in as Mark and create an issue by selecting the classification object owned by Erik, then the owner of the issue is changed to Erik.



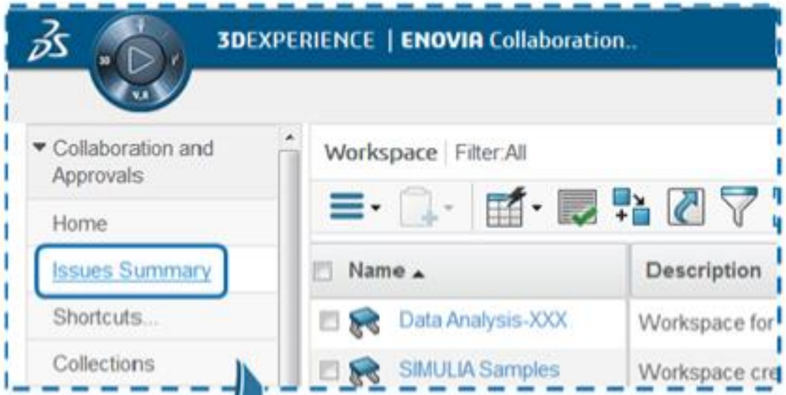


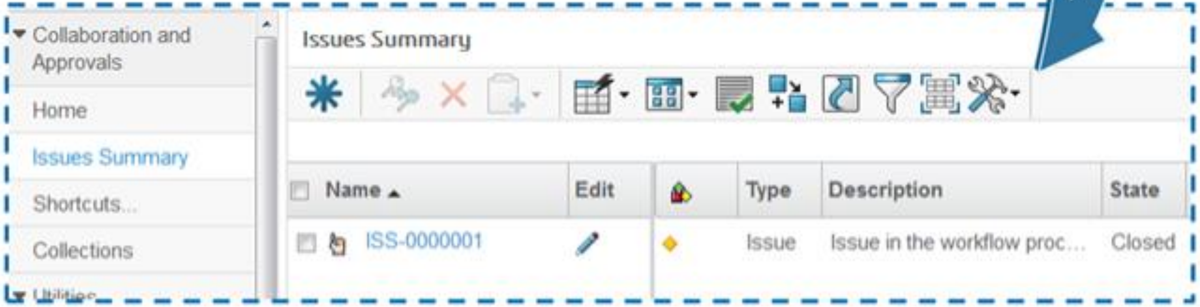


About Issues (4/5)

You can create, track and resolve various problems in the objects using issues.

- You can report issues against documents, routes, route tasks, parts, products and workspaces.
- In the **My Desk** menu, select **Collaboration and Approvals > Issues Summary** to view the issues. You can view the issues that are either created by you or assigned to you.
- The person who creates an issue becomes its originator. An originator can assign the issue's ownership only to an Issue Manager.

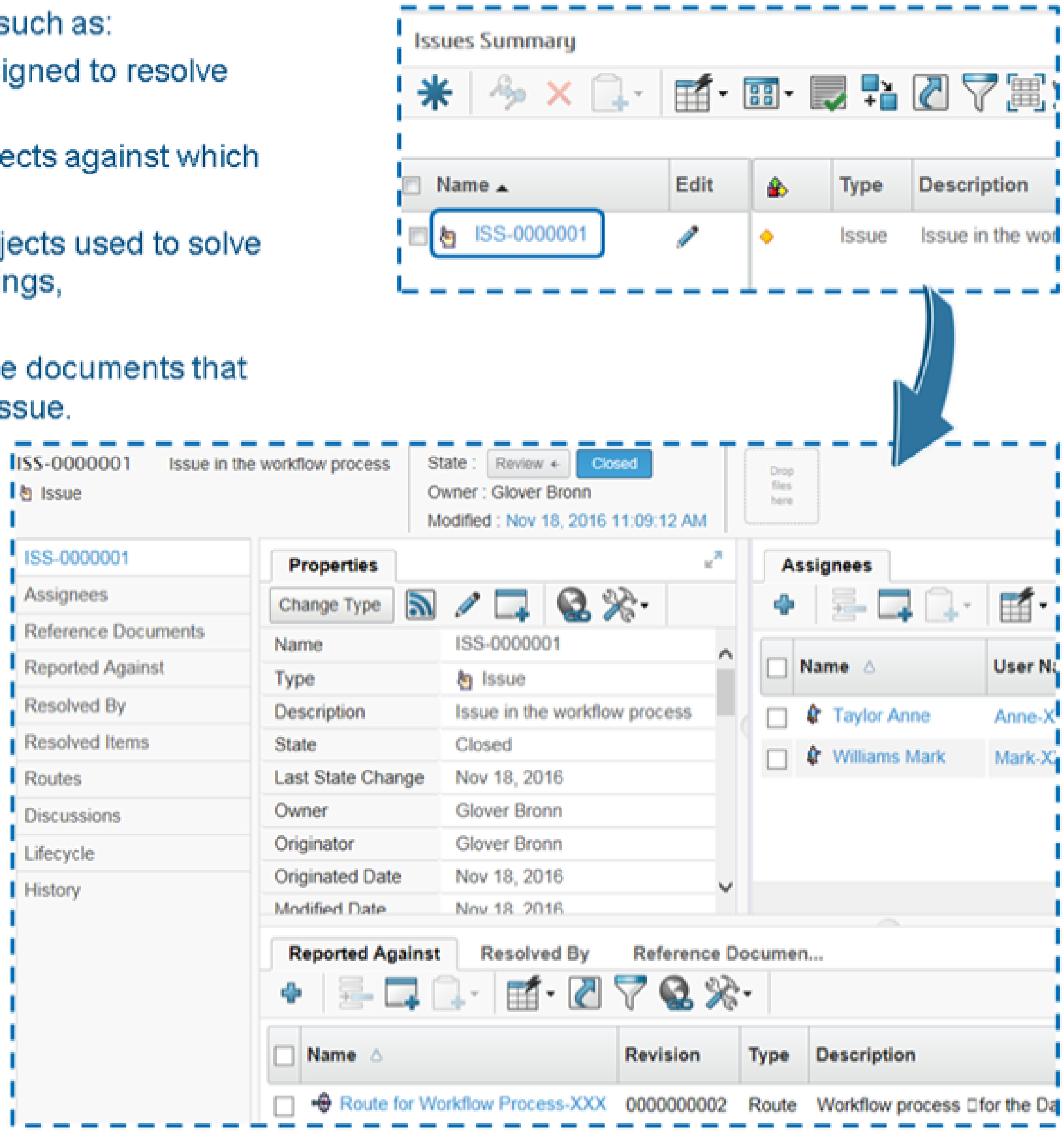




About Issues (5/5)

Click the issue name to view its details, such as:

- **Assignees**: Displays the people assigned to resolve the issue.
- **Reported Against**: Displays the objects against which the issue is reported.
- **Resolved By**: Displays the list of objects used to solve the issue, such as documents, drawings, changes or defects.
- **Reference Documents**: Displays the documents that provide additional details about the issue.



Lifecycle of an Issue

An issue has the following lifecycle states:

- **Create**: In this state, an originator can change the issue ownership and assign it to an Issue Manager. The Issue Manager specifies its estimated start and end dates, and promotes it to the **Assign** state.

- **Assign**: In this state, the Issue Manager assigns members to resolve the issue. Optionally, the owner of the issue can also complete the issue earlier than an assignee (if a resolution plan exists). Members get notified as soon as they are added as assignees. You cannot change the estimated start and finish dates in this state. The issue owner or the assignee can promote the issue to the **Active** state.

- **Active**: In this state, the *Actual Start Date* is automatically populated with the system date. The issue is now considered started and assignee can work on the issue.

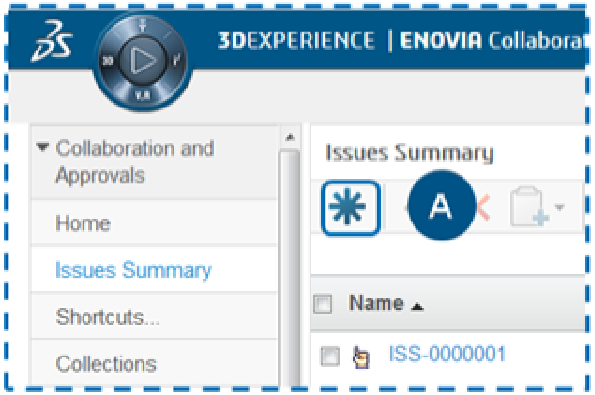
- **Review**: In this state, the owner or assignee can send the issue for review and approval, using the routing for approval process. Once approved, the issue is promoted to the **Closed** state either automatically through a route or manually (by owner or assignee).

- **Closed**: In this state, the *Actual End Date* is automatically populated with the system date. The issue is now considered closed. Upon closure of the issue the Originator is notified that the issue has been closed.

Creating a New Issue (1/2)

There are two ways of creating a new issue for an object.

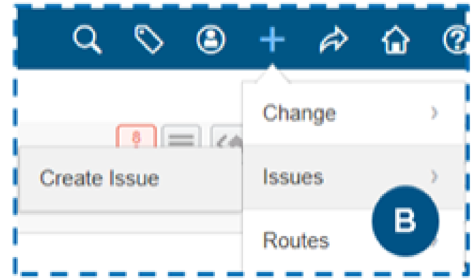
A. Using the Issues Summary Page
In the page toolbar, click the **Create New** icon.

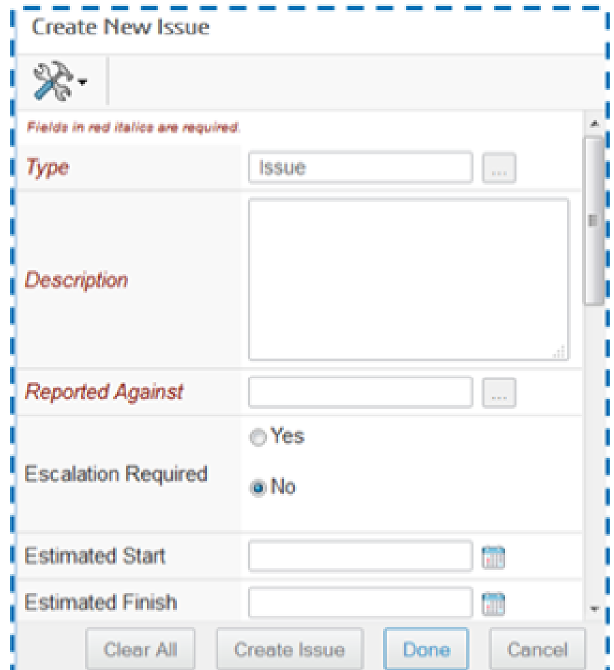


You must provide the following information for creating an issue.

- **Description**: A brief text explaining the issue.
- **Reported Against**: The object for which you want to create the issue.
- **Escalation Required**: If the issue requires an upper management support, select **Yes**.
- **Estimated Start/Finish**: The dates on which the issue is expected to begin or end.

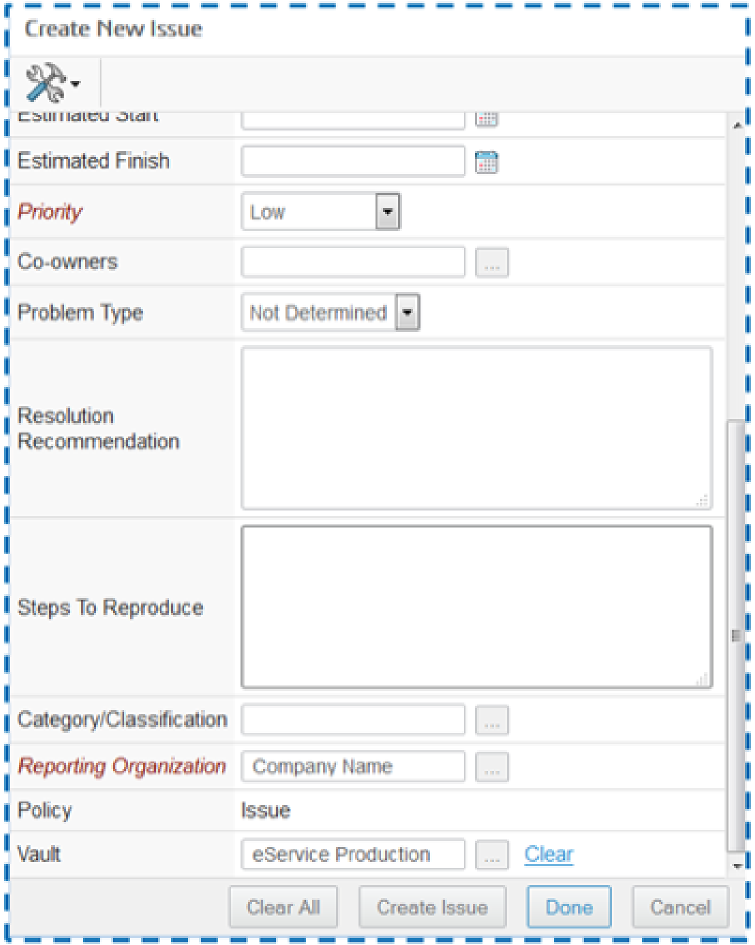
B. Using the Add Menu
In the top bar select **Add > Issues > Create Issue…**.





Creating a New Issue (2/2)

- **Priority**: Indicates the relative importance of the issue, when the issue was created or modified. Default values are **Pre-assigned**, **Medium**, **Low**, **High** or **Urgent**.
- **Co-owners**: One or more persons responsible for the issue.
- **Problem Type**: The type of problem related to the issue; whether it is **Defect, License**, **Installation** or **Performance**.
- **Resolution Recommendation**: Suggestion for resolving the issue.
- **Steps to Reproduce**: Procedure for reproducing the problem causing the issue.
- **Category/Classification**: This is defined by an organization to support the business processes.
- **Reporting Organization**: The organization which is reporting the issue.

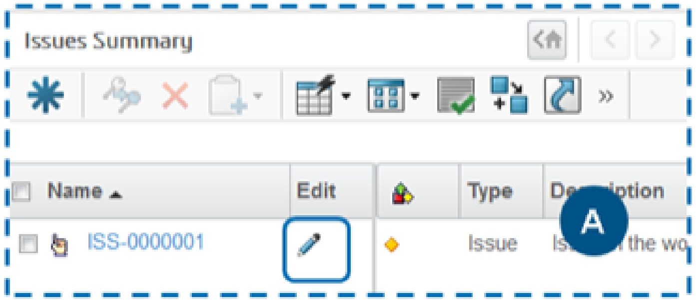


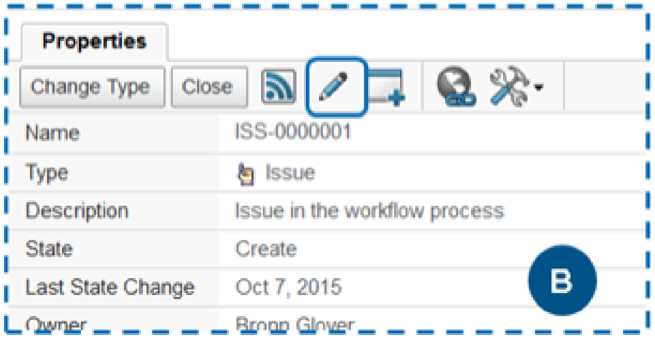
Editing an Issue (1/2)

You can edit information about an issue in either of the two ways:

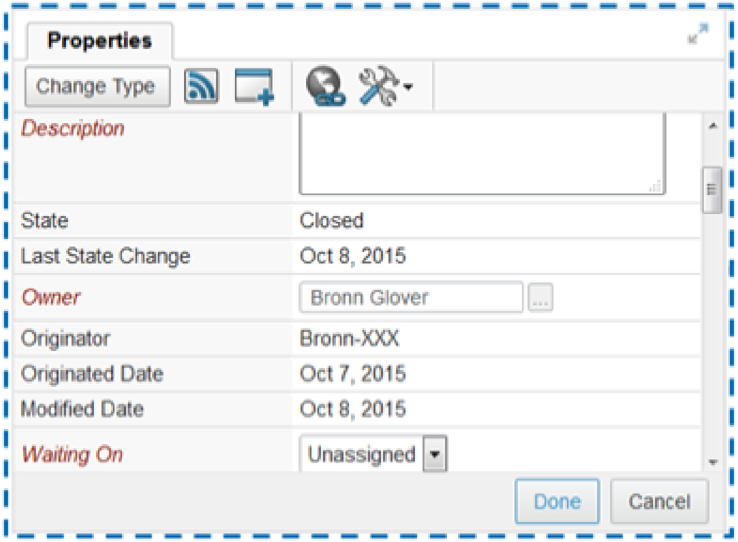
A. Using the **Issues Summary** page

B. Using an issue's **Properties** page



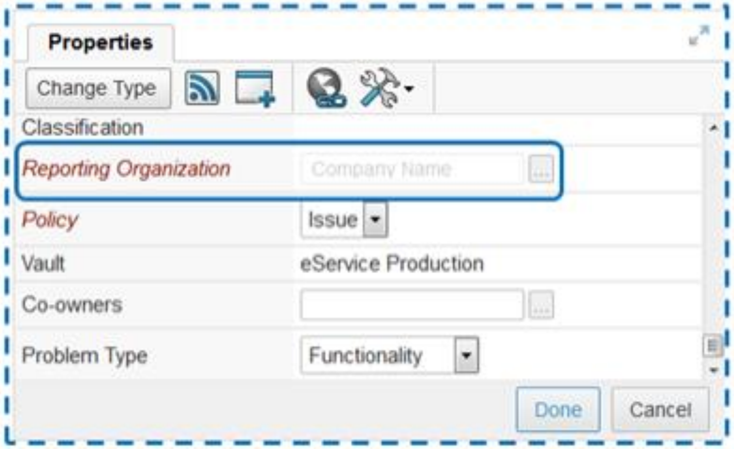


- You can modify the ownership, dates, description and priority.
- **Waiting On** indicates the next person to respond to the issue.

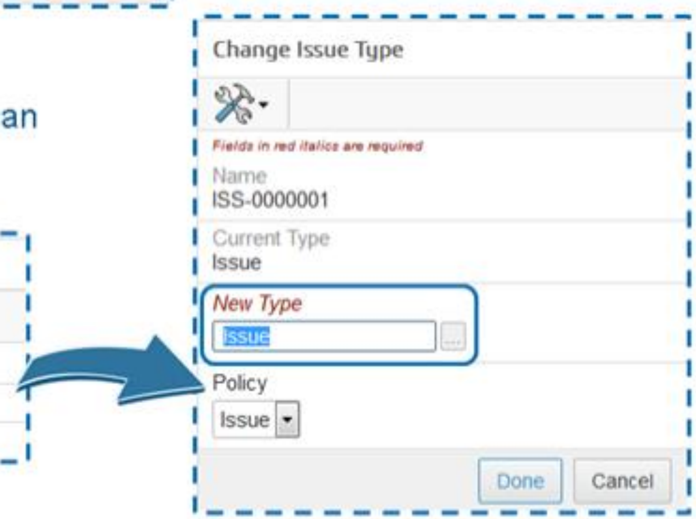


Editing an Issue (2/2)

- Only an Analyst who owns the issue can change the **Responsible Organization**.



- If another type is defined for the issues, an Issue Manager can re-classify it by changing its type.



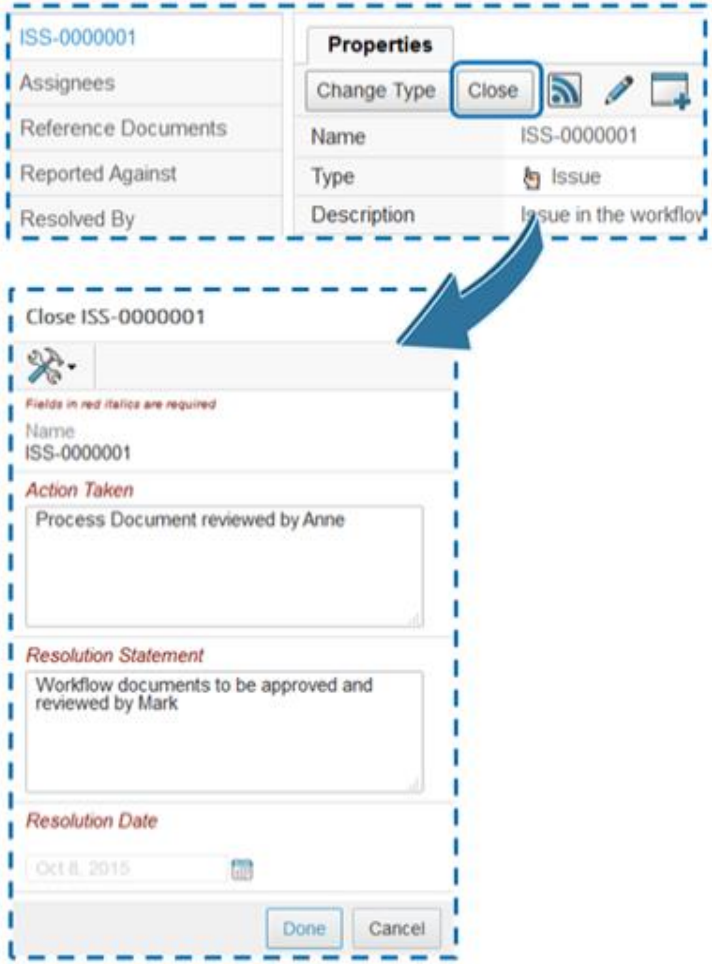
Note:
An Analyst is equivalent to an Issue Manager. This role is assigned to a person belonging to an external company, who is responsible for the resolution of the issues.

Resolving an Issue

A simple issue can be resolved by a phone call to the customer, or may require a change in a design. Complex issues can be escalated to upper management to further analyze the problem and propose a solution.

To resolve or close an issue, the Issue Manager must specify the following resolution statements:

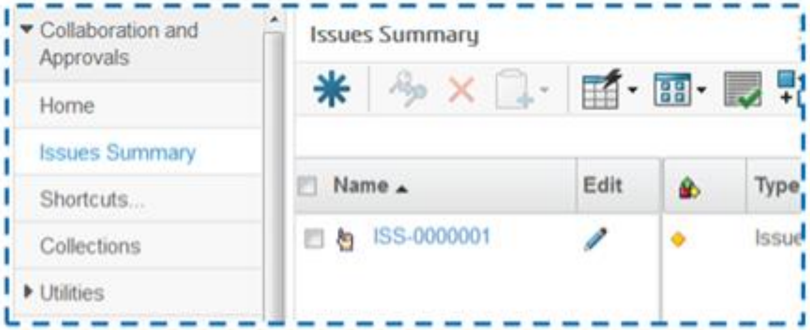
- **Action Taken**: A brief explanation of the steps or processes to resolve the issue.
- **Resolution Statement**: A description about the issue resolution.
- After the assignees have fixed the issue, the Issue Manager closes the issue.



Summary

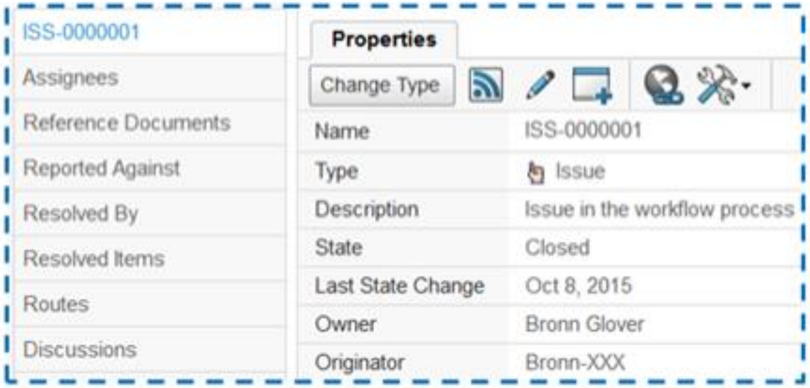
Managing Issues

- You can report issues against any object such as documents, routes, route tasks, parts, products and workspaces.

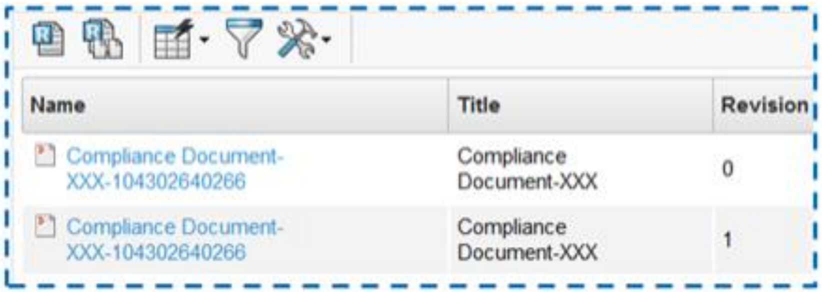


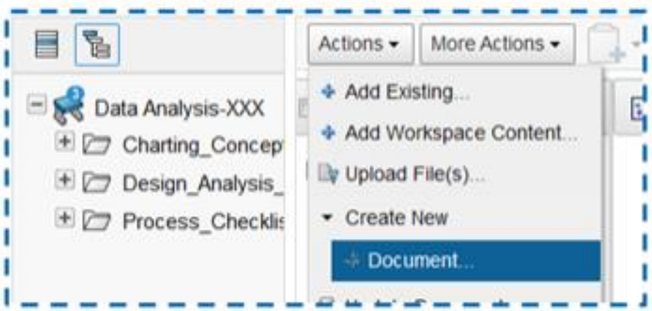
- The person who creates an issue becomes its originator. An originator can assign the issue's ownership to an Issue Manager.

- A simple issue can be resolved by a phone call to the customer, or may require a change in a design. Complex issues can be escalated to upper management to further analyze the problem and propose a solution.



Working with the Common Document Model





Here are the topics to be covered:

1. *Getting Started with the ENOVIA Collaboration and Approvals App*
2. *Managing the Workspaces*
3. *Working with Routes*
4. *Managing the Assigned Tasks*
5. *Working with Subscriptions*
6. *Managing Issues*
7. **Working with the Common Document Model**

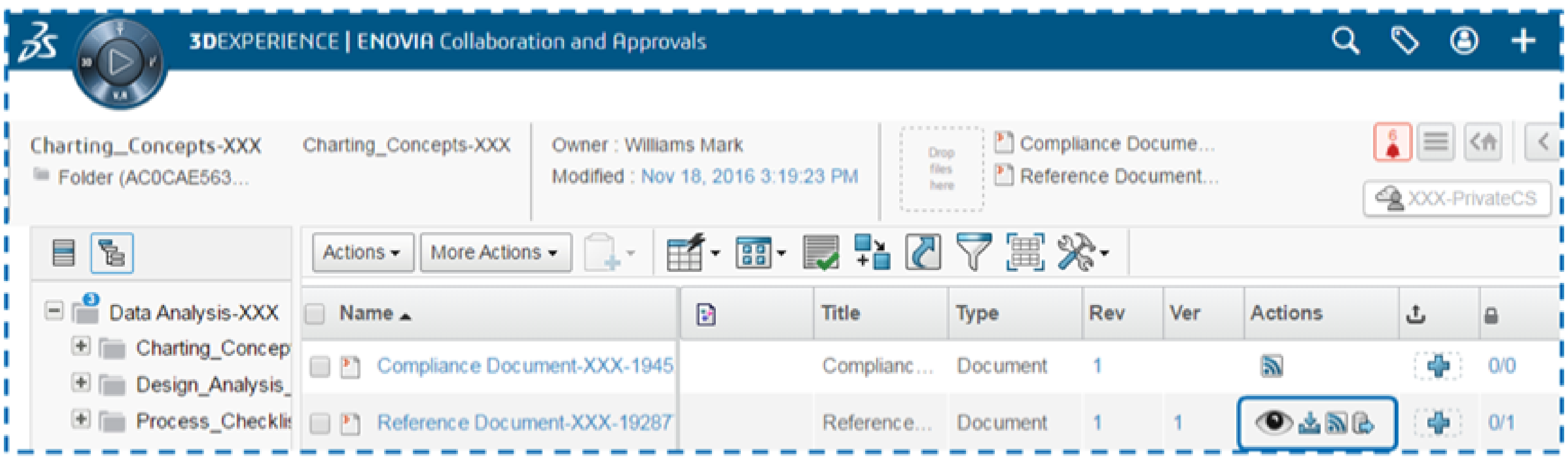
About the Common Document Model

The Common Document Model (CDM) enables you to manage documents and files, and share them with other members across different apps.

You can perform the following operations on the documents using the CDM:

- Create documents
- Check in and check out documents and files
- Subscribe to documents
- Create revisions and versions of documents
- Delete documents

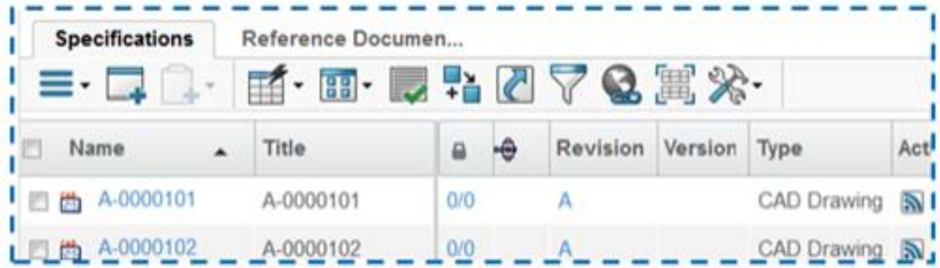
You can either use the **Actions** menu or the icons in the **Actions** column to perform the above mentioned operations.

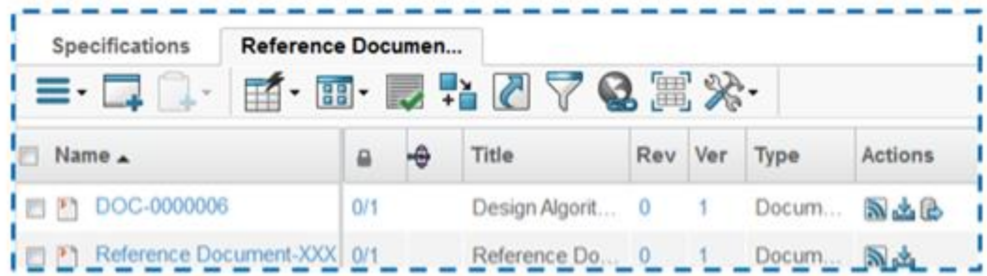


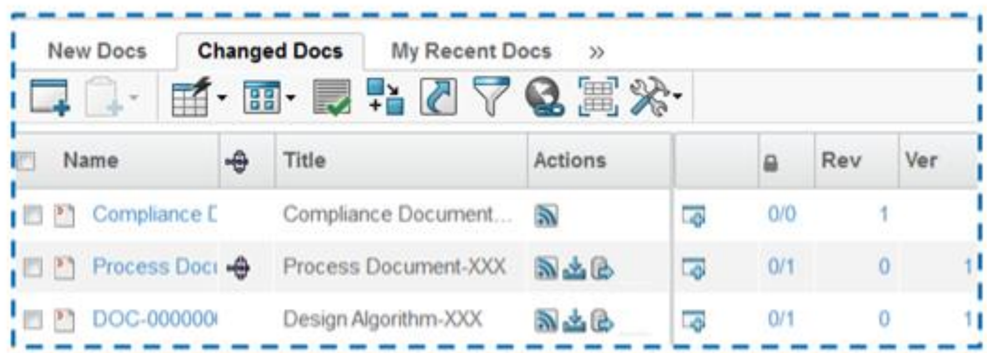
About Documents

Objects can have content in the form of documents and files associated with them. Documents serve as a container object for files. You can create documents and upload files to them. Depending on the context object, you can access the **Documents** page using any of these categories:

- Reference Documents
- Attachments
- Specifications
- Deliverables
- Supporting Documents
- Standard Content
- Documents



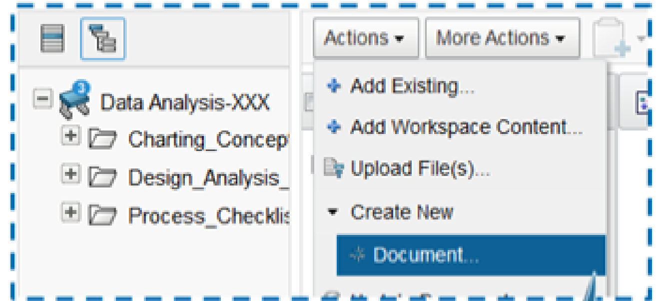


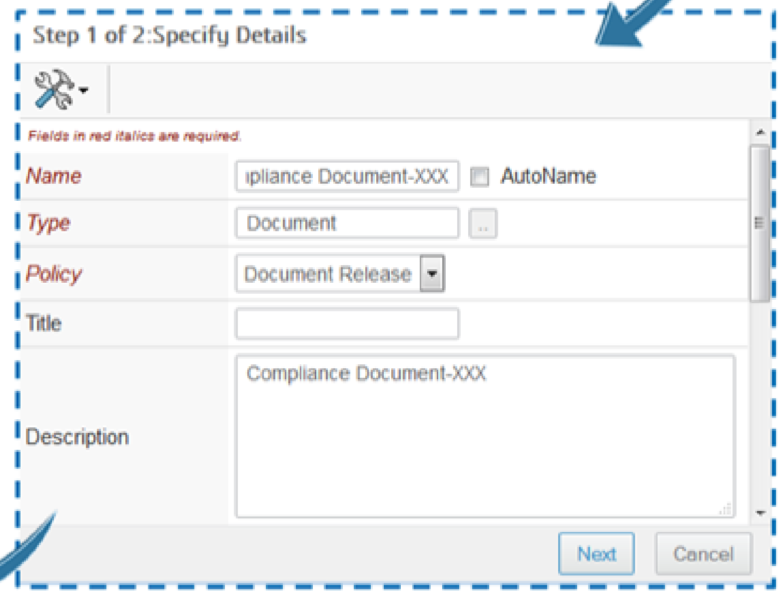


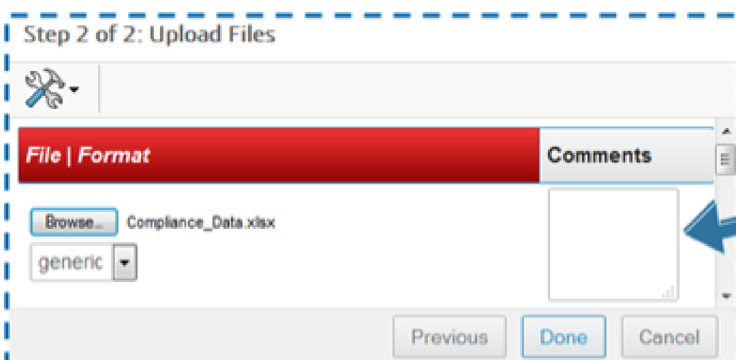
Creating Documents

Documents are the objects that belong to the *CDM* and can be created using the *Common Component Wizard.*

In the **Documents** page, select
Actions > Create New > Document….

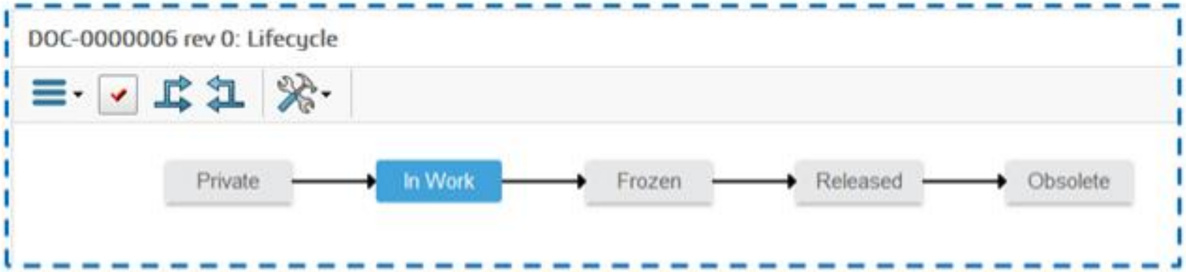






Lifecycle of a Document

A common document has five lifecycle states that are defined in the Document Release policy.



- **Private**: In this state, a document is accessible only to its owner. The document can be accessed by other members once the owner promotes it to the **In Work** state.
- **In Work**: In this state, you can modify the document or create its new revision. The owner can either demote the document to the **Private** state, or promote it to the next state.
- **Frozen**: In this state, the document is in the review process for approval. You can demote and promote the document between the **In Work** and **Frozen** states without creating new versions.
- **Released**: In this state, the document is available for production and delivery. A released document cannot be deleted or demoted. When the document is no longer used, its owner promotes it to the **Obsolete** state.
- **Obsolete**: In this state, the document is no longer used and must not be used in projects. You cannot promote, demote or delete it. However, you can create a new revision of the document.

Performing Check In and Check Out Operations

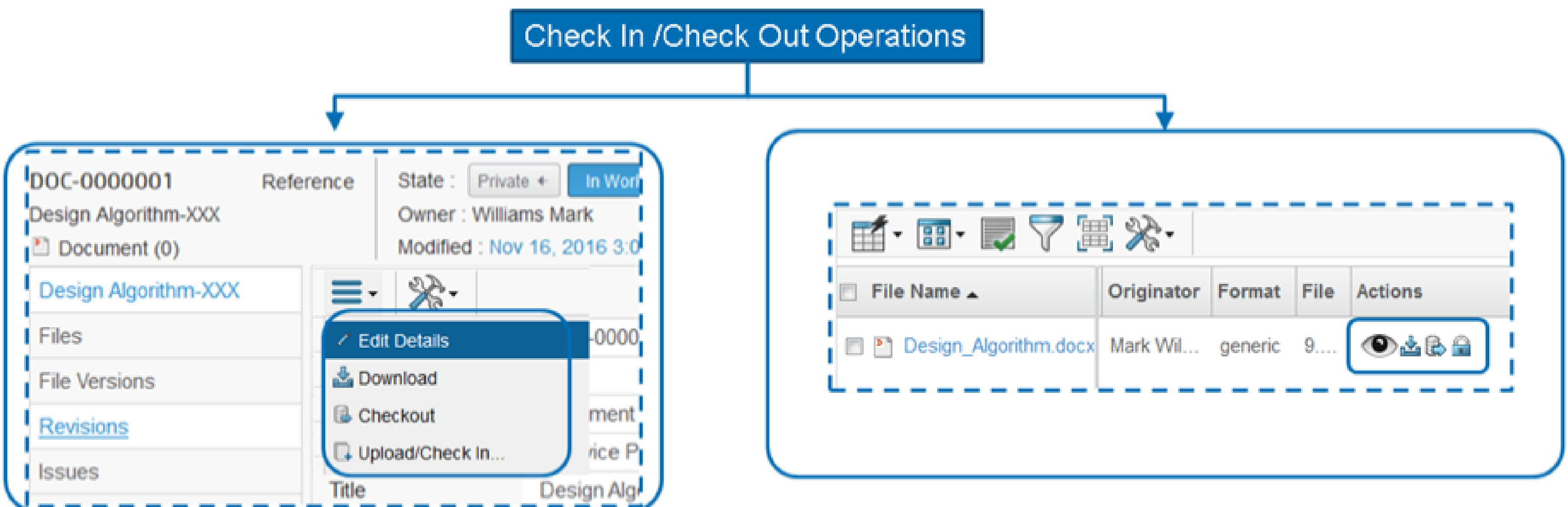
About Upload/Check In

You can use the *Upload/Check In* functionality to upload files from your computer to the database. When you check in an edited file, its new version is automatically created. The system thus, keeps a track of all the checked-in versions.

About Checkout

You can use the *Checkout* functionality to download a file from the database to your computer. When you check out a file, the document is locked. Locking of the file helps you to work independently without letting the file to be modified by any other user.

You can use either of the two ways to check in or check out a file from a document;



In the **Actions** menu, use the **Chekout** or **Upload/Check In...** commands

In the **Actions** column, use the **Chekout** or **Check In** icons

About Revising a Document

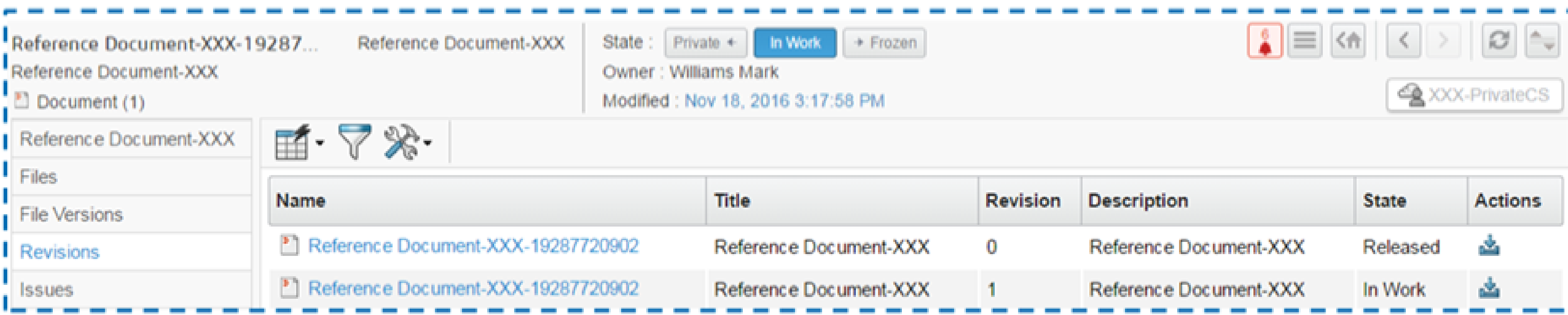
Changes cannot be made to a document after it is released. If you want to modify a released document, you must create a new revision of the existing document. You can then make the changes in the new revised document, which will be in the **Create** state.

Prerequisites for Document Revision

To revise a document object, the following conditions are required:

- The document must be in the **Released** state.
- The user must have the revise access in the current state of the document.

If all the above checks are true, then both the **Revise** and **Revise with Files** options are available in the **Revisions** page.



Revising a Document (1/3)

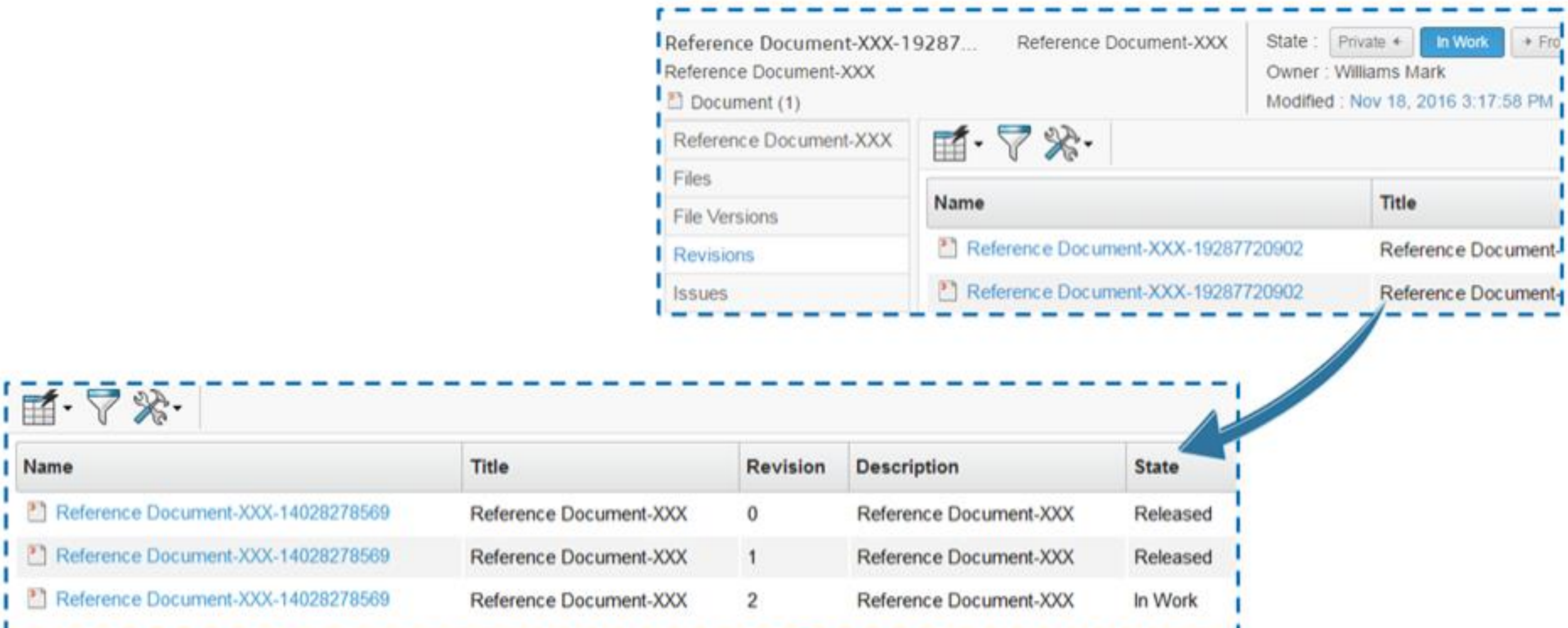
There are two ways of revising a document; revising without files and revising with files, as explained below.

A. Revise a document without its files

Using **Revise**, you can create a new revision of a document without the files that are attached to it. This action is only available if the selected document is the latest revision in the sequence.

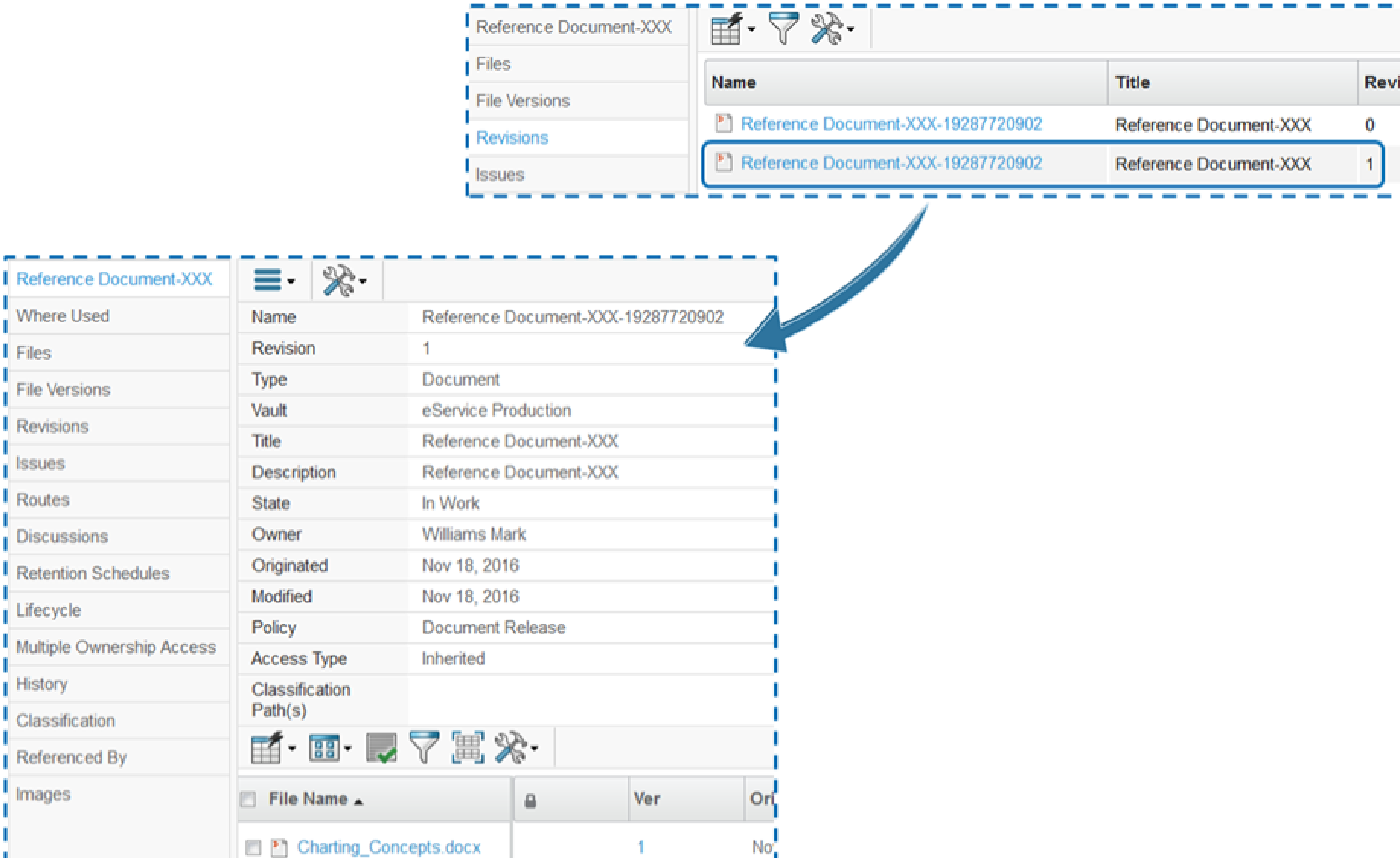
- Navigate to a **Released** document, and click **Revise** in the page toolbar.

  Observe that the **Revision** is updated.
  You can keep a track and view all the revised documents, as shown below.



Revising a Document (2/3)

If you click the document with the latest revision, you will find that no file is attached to the document after it is revised.



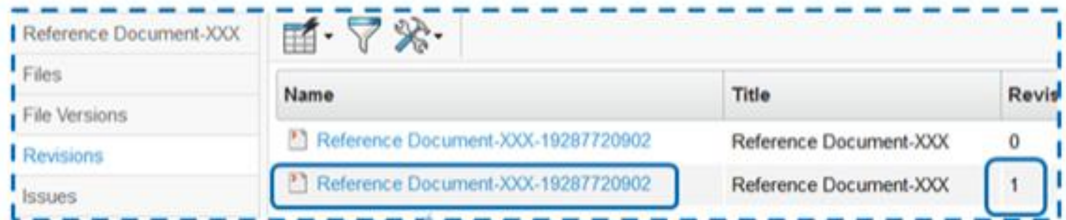
Revising a Document (3/3)

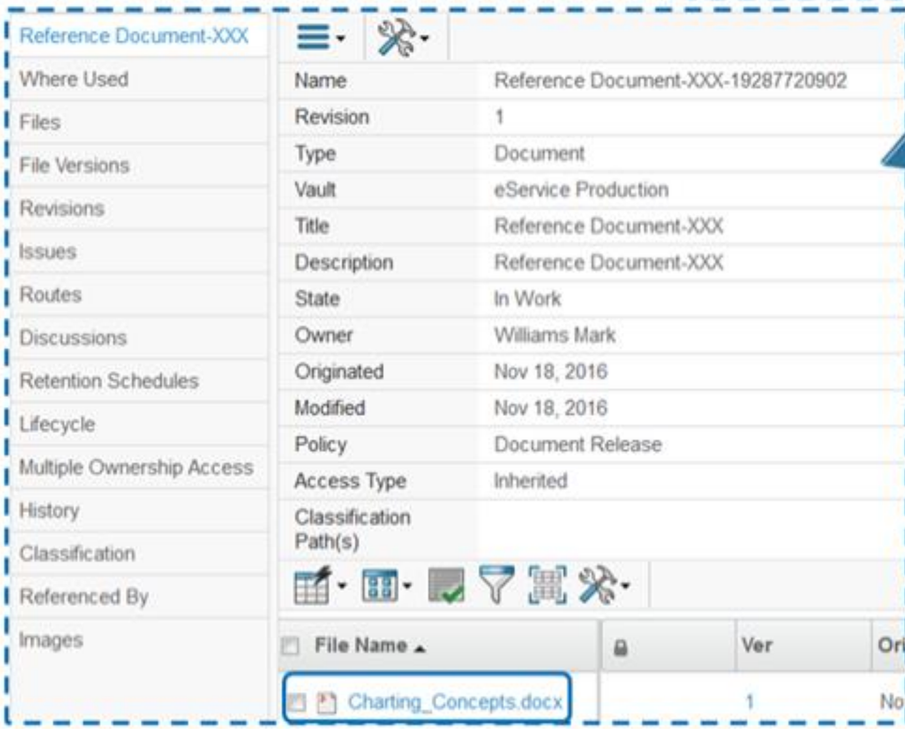
B. Revise a document with its files

Using **Revise With Files**, you can create a revision of the document with the files that are attached to it. This option is available only if the selected document is the latest revision in the sequence.

- Navigate to a released document's **Revisions** page.
- In the page toolbar, click **Revise with Files....**

  Observe that the **Revision** is updated.



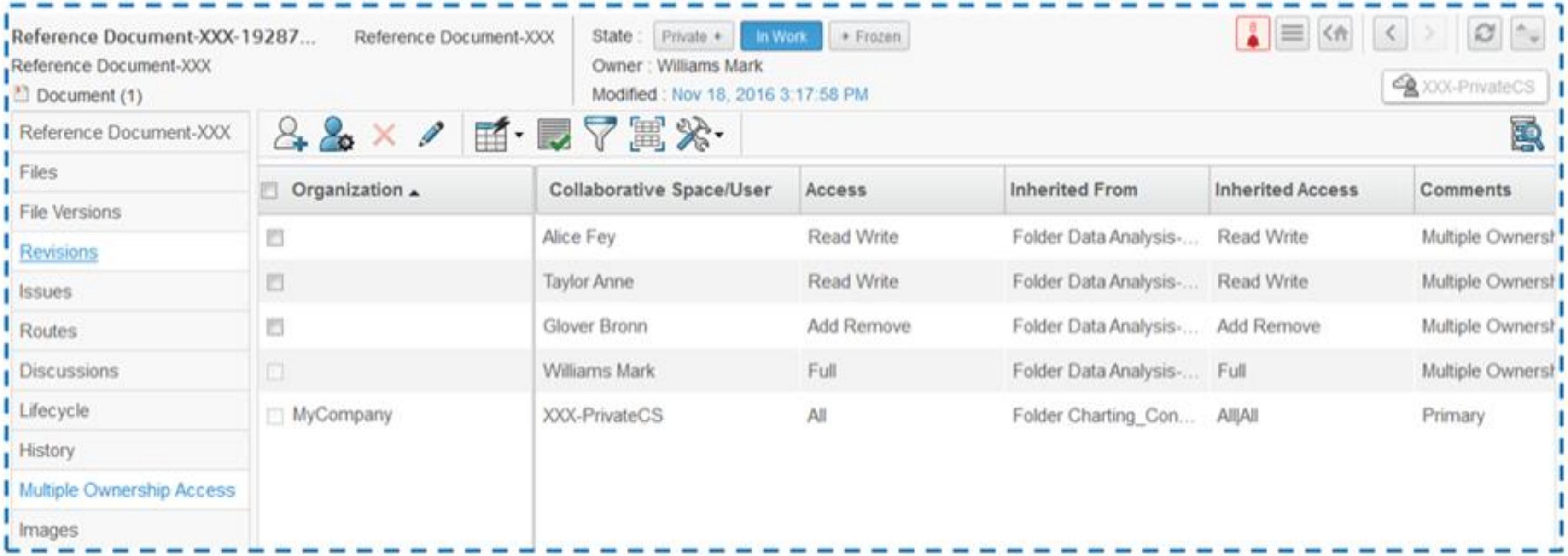


Defining Access Rights for Documents

You have already learned about defining access rights for folders. Similarly, you can define the access rights for the documents.

By default, the access defined for a folder is automatically assigned to its documents.

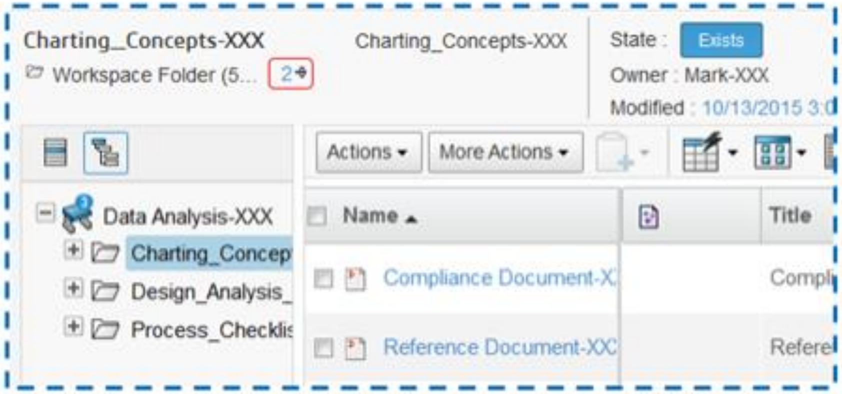
You can also individually add members or security contexts to assign access to a document.



Summary

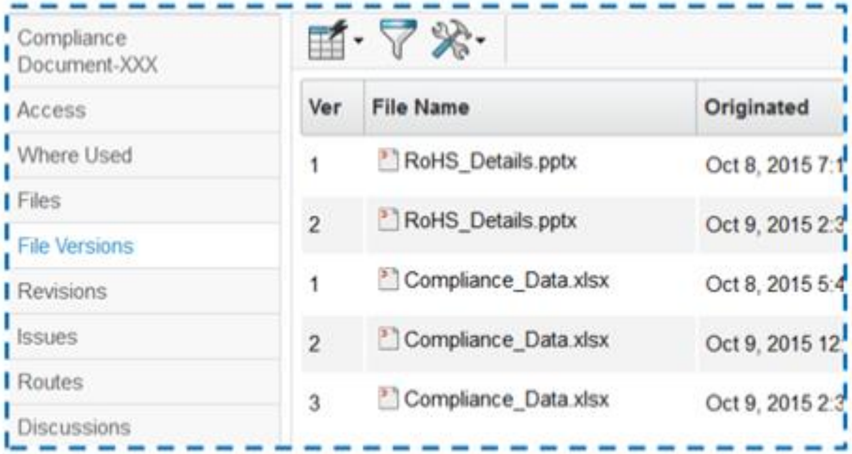
Working with the Common Document Model

- The Common Document Model (CDM) enables you to manage documents and files, and share them with other members across different apps.



- Objects can have content in the form of documents and files associated with them. Documents serve as a container object for files. You can create documents and upload files in them.

- If you want to modify a released document, you must create a new revision of the existing document. You can then make the changes in the new revised document, which will be in the **In Work** state.



- You can define the access rights for the documents. By default, the access level defined for a folder is automatically assigned to the documents added to the folder.

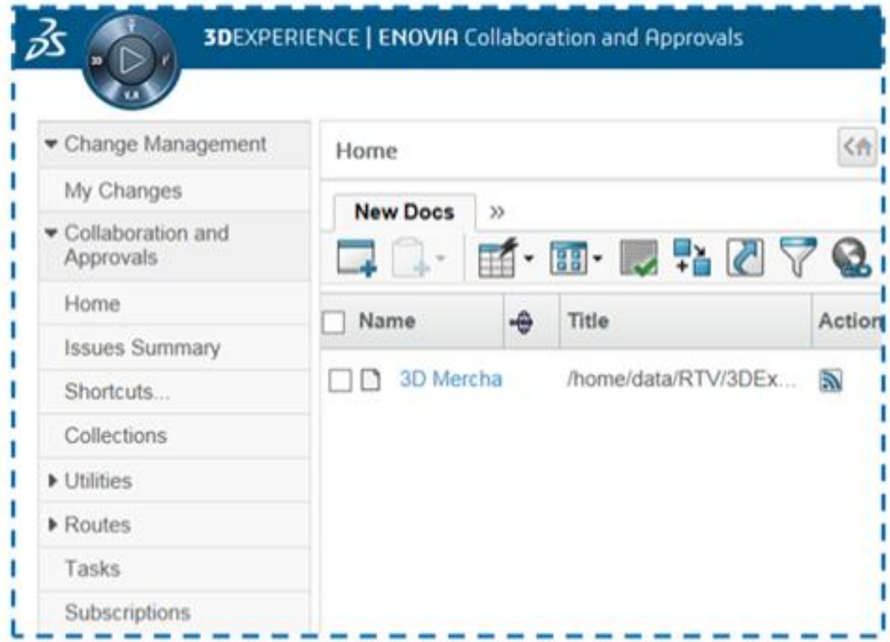
- You can also individually assign members to access the documents. You can add members or security contexts to assign access to a document.

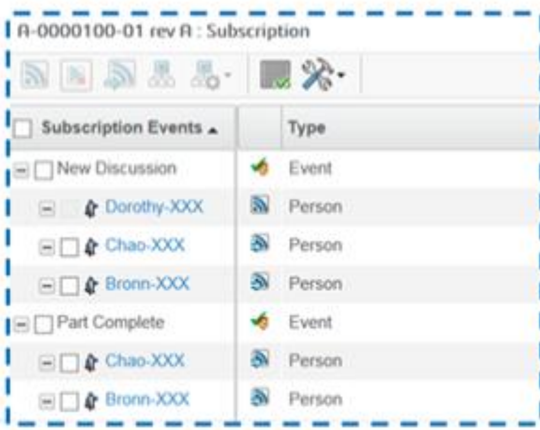
Master Project: ENOVIA Collaboration and Approvals Essentials

The objective of this master project is to get started with **ENOVIA Collaboration and Approvals** App.

Upon completion of this course, you will be able to:

1. Create and manage your folders
2. Create workflows
3. Identify and manage your assigned tasks
4. Subscribe to various objects and events
5. Report and resolve issues in objects
6. Create, track and organize your documents





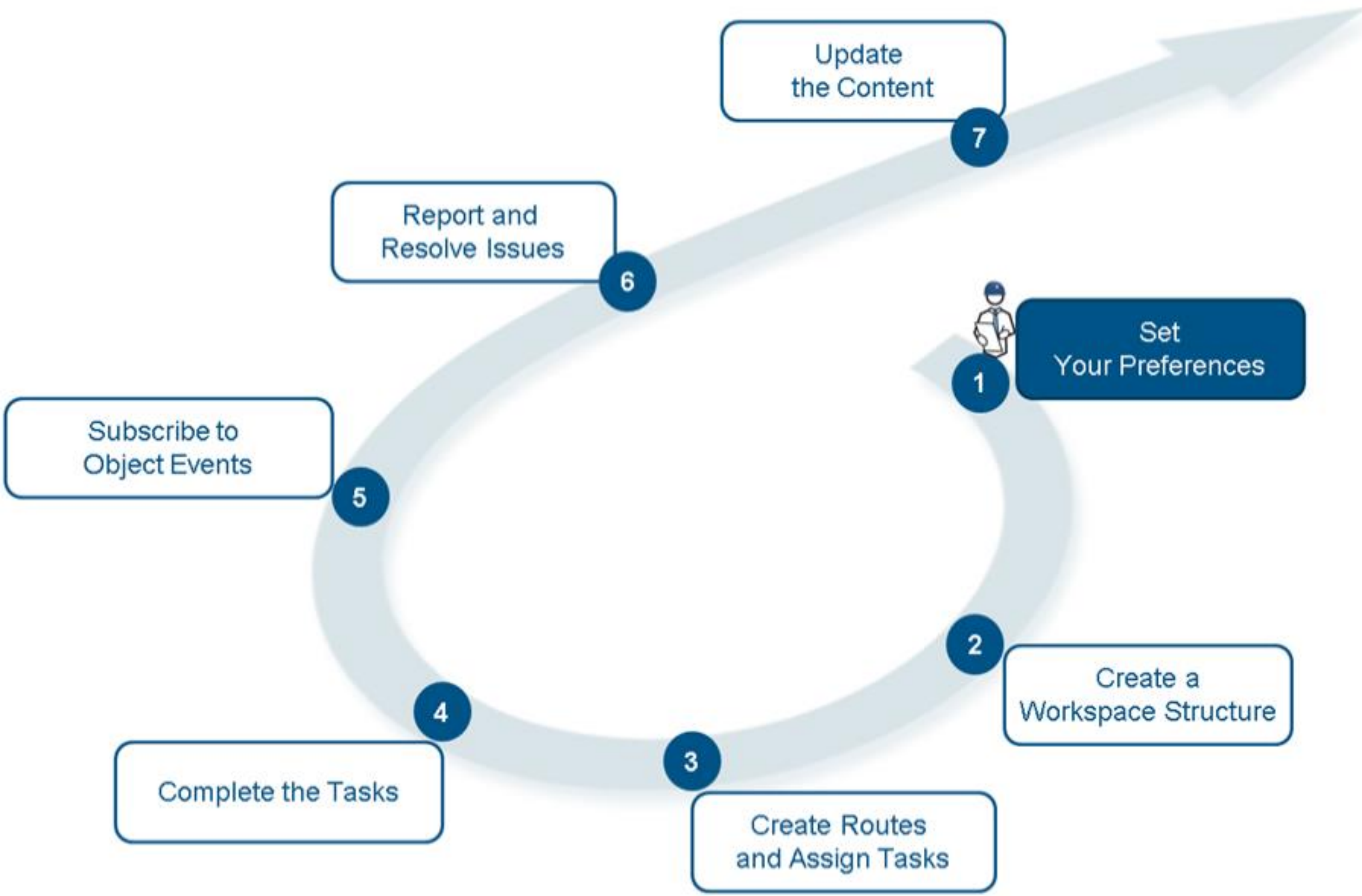
4 hours

Exercise: Set Your Preferences

You will log in as Mark, and set your preferences. You will save the frequently-used app as your favorite, change your security context (without logging out of the application), and set your home page.

20 minutes

Exercise Progression



Download the Course Data

To replay the exercises of this course, you need to download the data provided with the course.

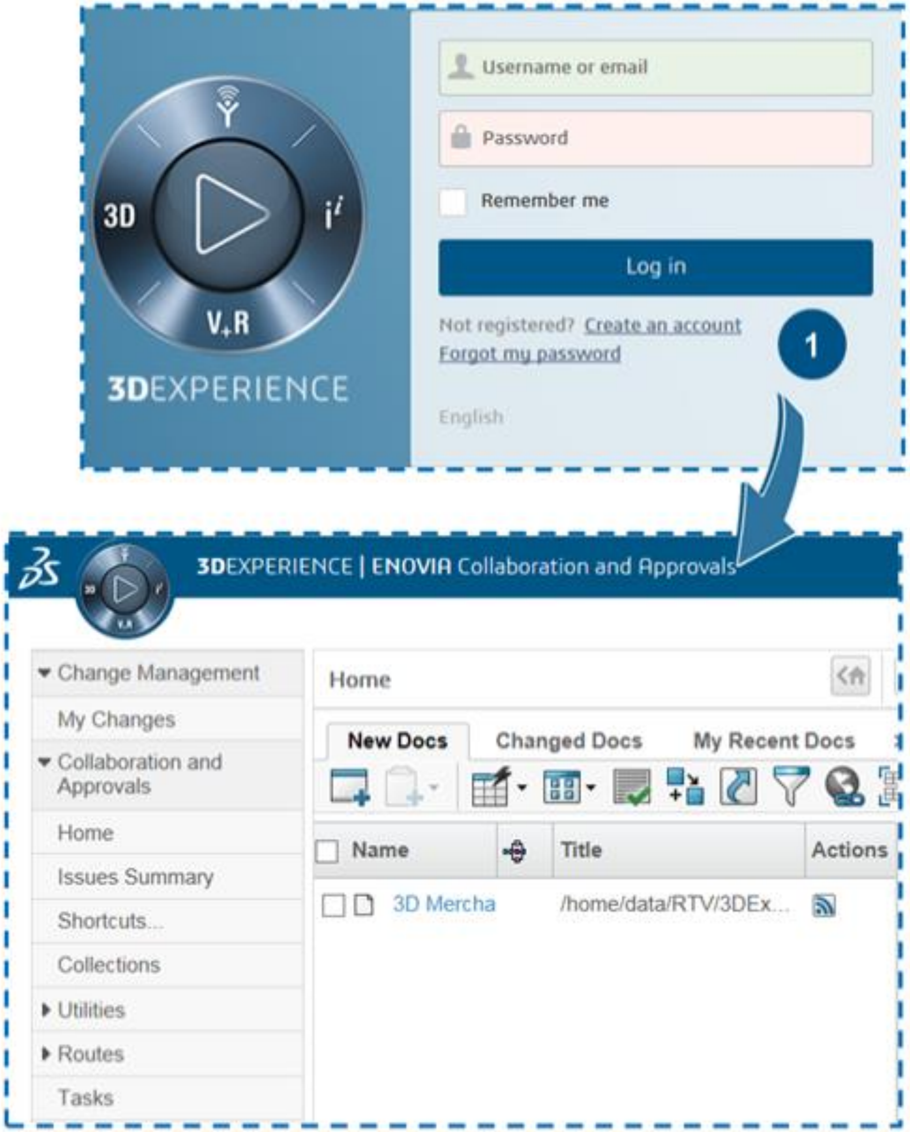
- Download the *BUPS_R2017x_Data.zip* file to your local folder.
- Extract the contents using the **Extract All** option. The extracted file will contain the **BUPS_R2017x_Data** folder.
- Copy the **BUPS_R2017x_Data** folder and paste it in the **C:** drive. This folder contains various dummy documents that you will require while replaying the scenario. Whenever you are asked to attach a document and/or import a file while replaying a step, you will find it in this folder.

Log In to the 3DEXPERIENCE Platform

1. Log in to the **3D**EXPERIENCE platform with the following credentials:

   a. **Username or email**: [Mark-XXX]

   b. **Password**: [Mark-XXX]



Save Your Favorite App

You can save the app that you use most, using the following steps:

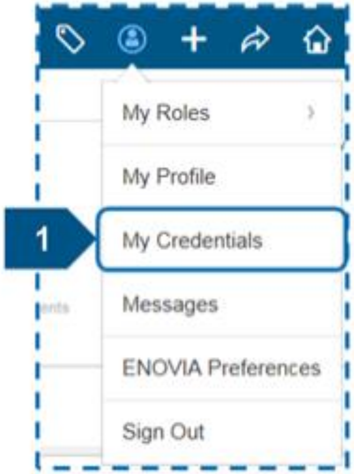
1. In the **Compass**, click **My Social And Collaborative Apps**.

2. Expand the **My Social And Collaborative Apps** menu.

3. Drag and drop the **ENOVIA Collaboration and Approval** app to **My Favorite Apps** menu.

Check Your Credentials

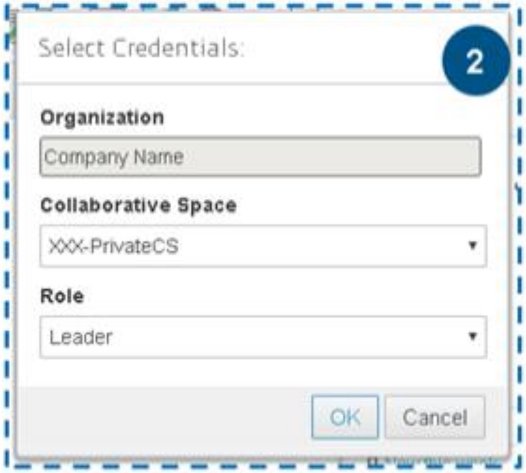
1. In the top bar, select **Me > My Credentials**.



2. Specify the following set of values for the security context, and click **OK**:

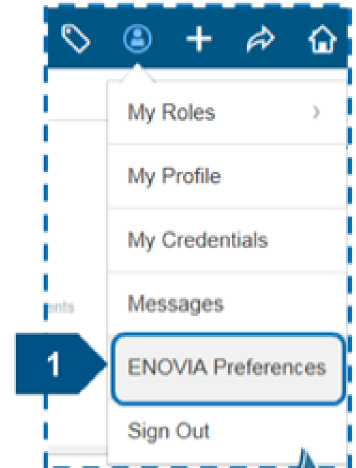
   a. **Collaborative Space**: **XXX-PrivateCS**

   b. **Role**: **Leader**

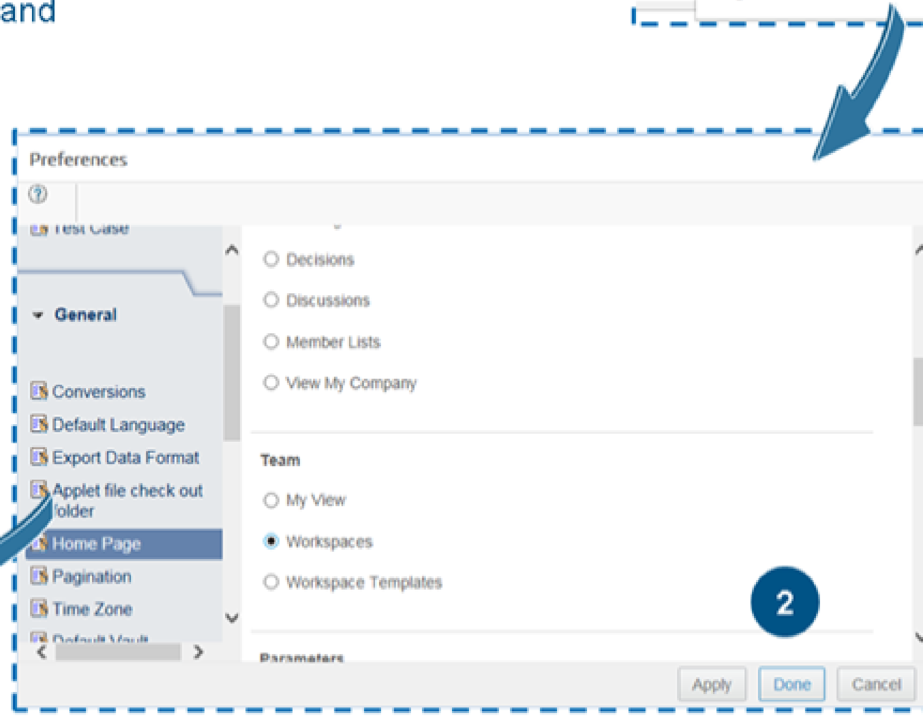


Set Your Home Page

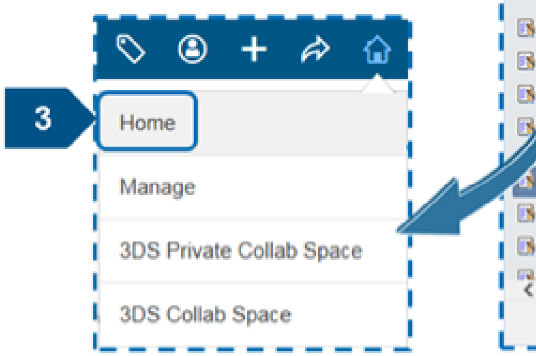
1. In the top bar, select **Me > ENOVIA Preferences**.



2. In the left panel, select **General > Home Page**. Then, select **Workspaces** as your home page, and click **Done**.

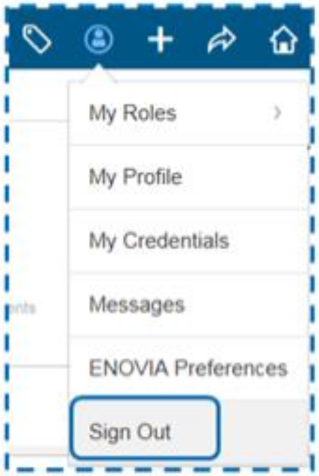


3. In the top bar, select **Home > Home**, to view your selected home page.



Log Out of the 3DEXPERIENCE Platform

In the top bar, select **Me > Sign Out**.



Recap: Set Your Preferences

In this exercise, you have:

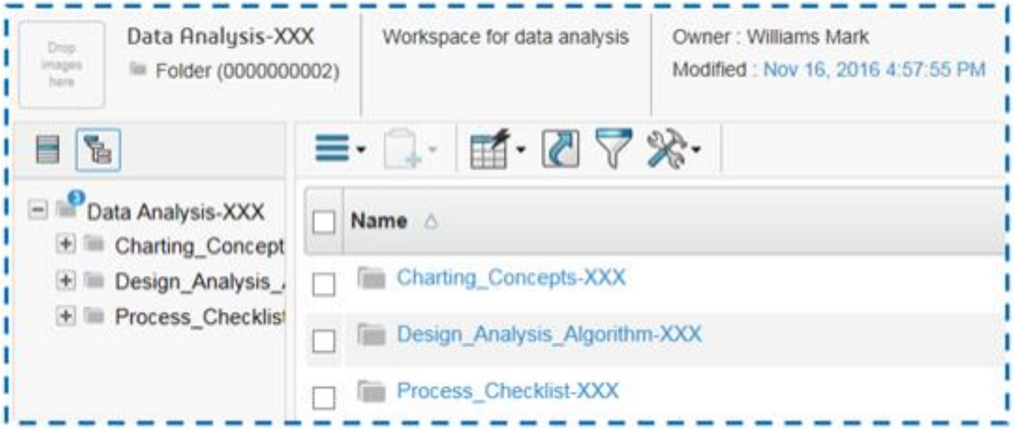
- ✓ Saved your favorite app
- ✓ Checked your credentials
- ✓ Set your home page

Exercise: Create a Workspace Structure

You will log in as Mark, and create a workspace structure. You will assign members to the workspace, and create its folders, meetings and discussions.

By the end of this exercise you will be able to:

1. Create a workspace
2. Add folders and members to the workspace
3. Create a meeting and add an agenda items
4. Add attendees for the meeting
5. Add a decision to the meeting
6. Create a discussion thread about the workspaces
7. Save the workspace as a template



45 minutes

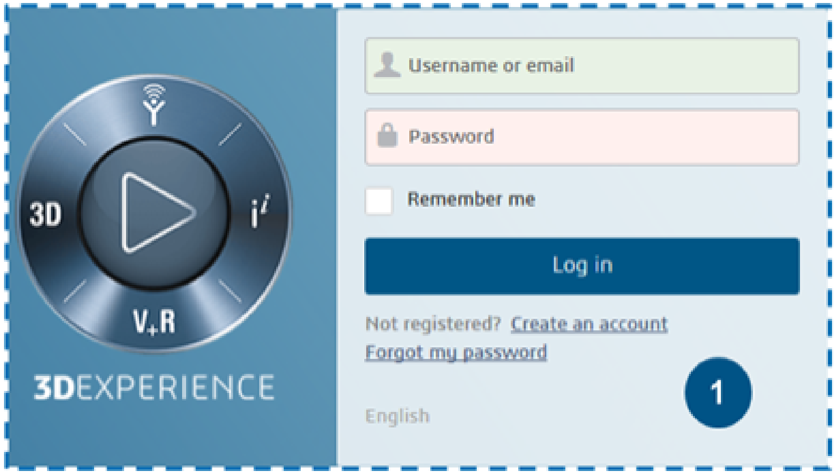
Exercise Progression

Create a Workspace (1/2)

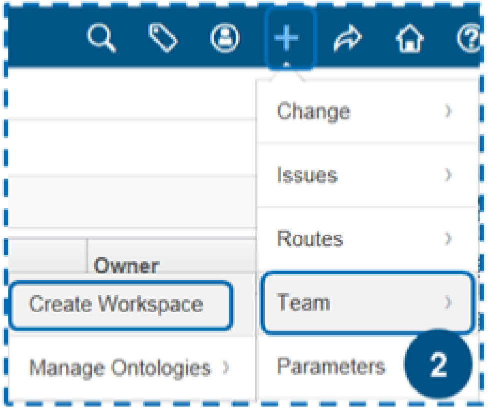
1. Log in to the **3D**EXPERIENCE platform with the following credentials:

    a. **Username or email**: [Mark-XXX]

    b. **Password**: [Mark-XXX]



2. In the top bar, select **Add > Team > Create Workspace**.

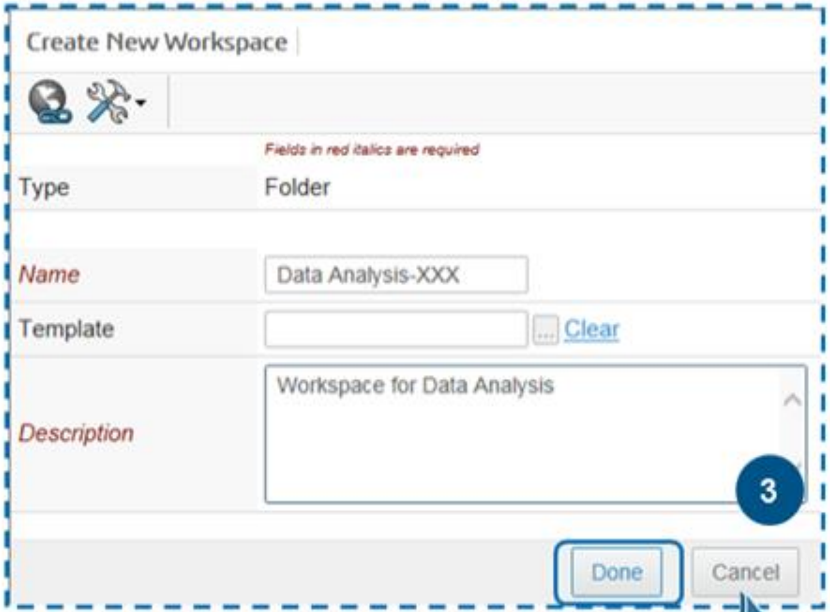


Create a Workspace (2/2)

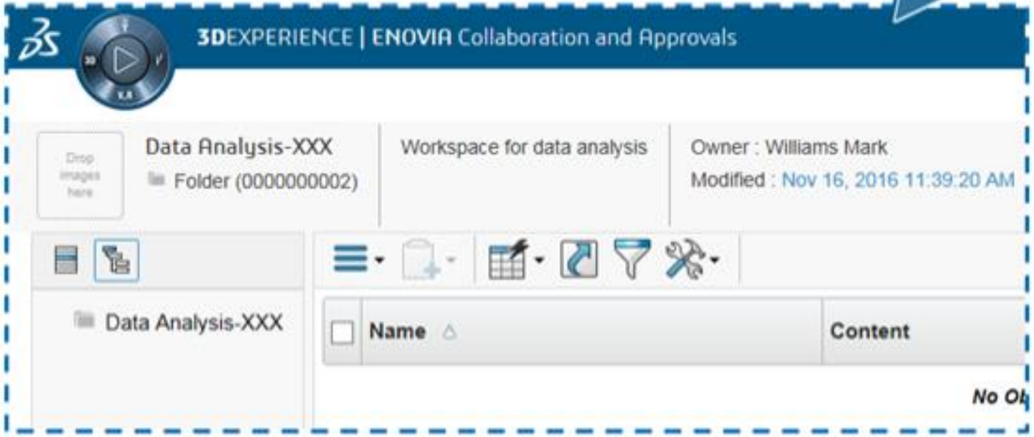
3. Specify the following details and click **Done**:

   a. **Name**: [Data Analysis-XXX]

   b. **Description**: [Workspace for data analysis]



By default the workspace is in the **Create** state.

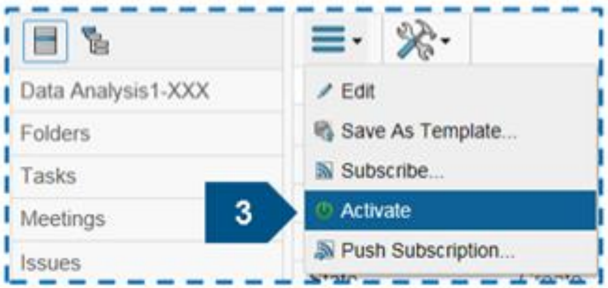


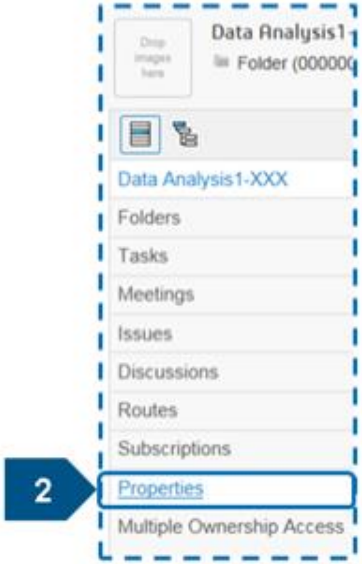
Promote the Workspace to an Active State (1/2)

1. Click the **Categories** icon.

2. In the category tree, select **Properties**.

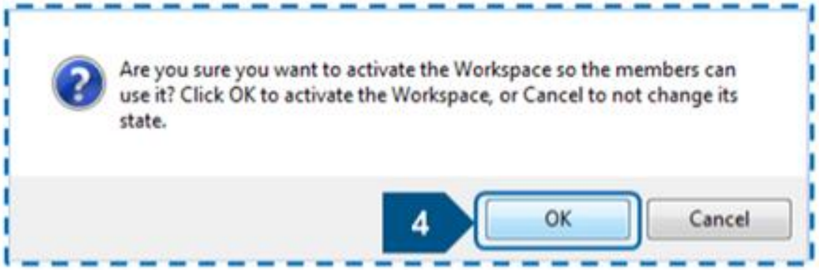
3. In the page toolbar, select **Actions > Activate**.



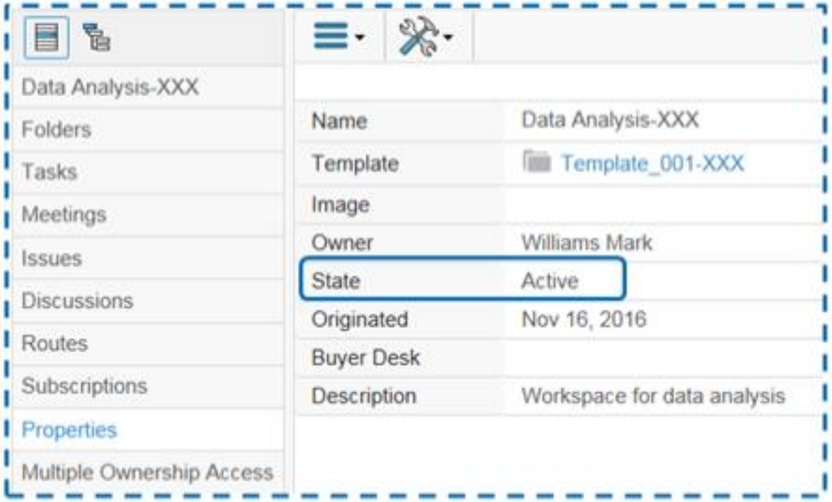


Promote the Workspace to an Active State (2/2)

4. Click **OK**.

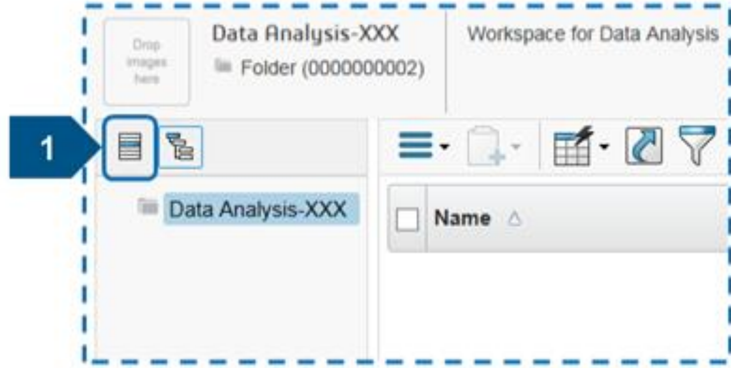


Observe that the workspace is promoted to the **Active** state.

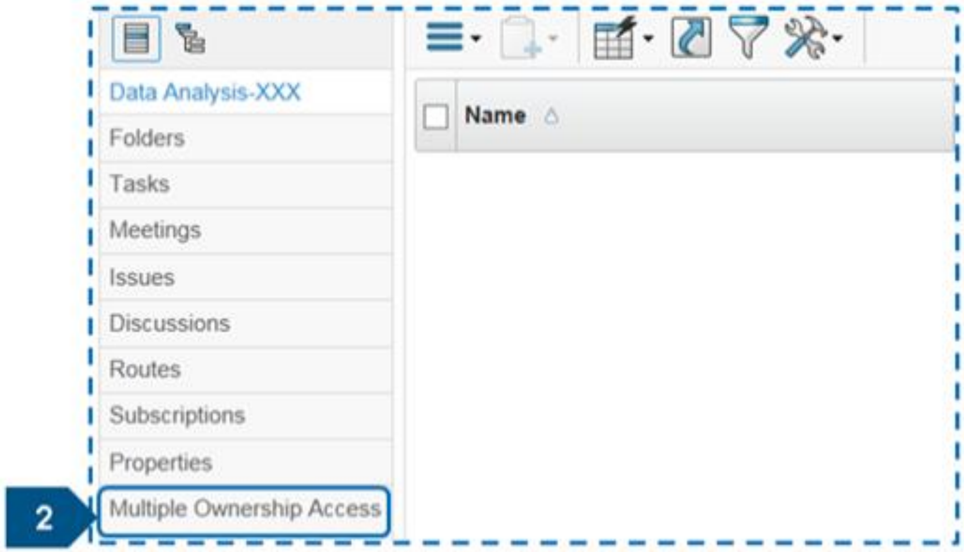


Add Members to the Workspace (1/5)

1. Click the **Categories** icon.

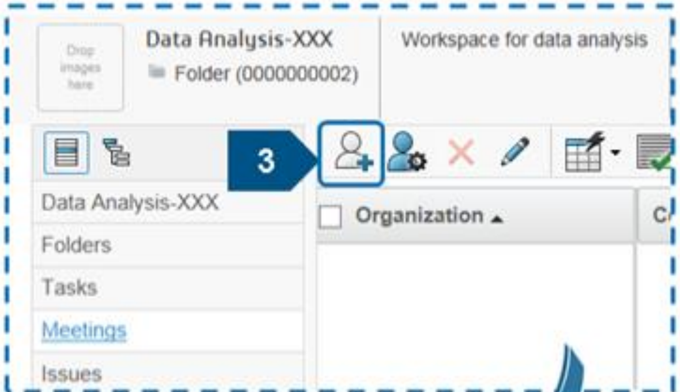


2. In the category tree, select **Multiple Ownership Access**.

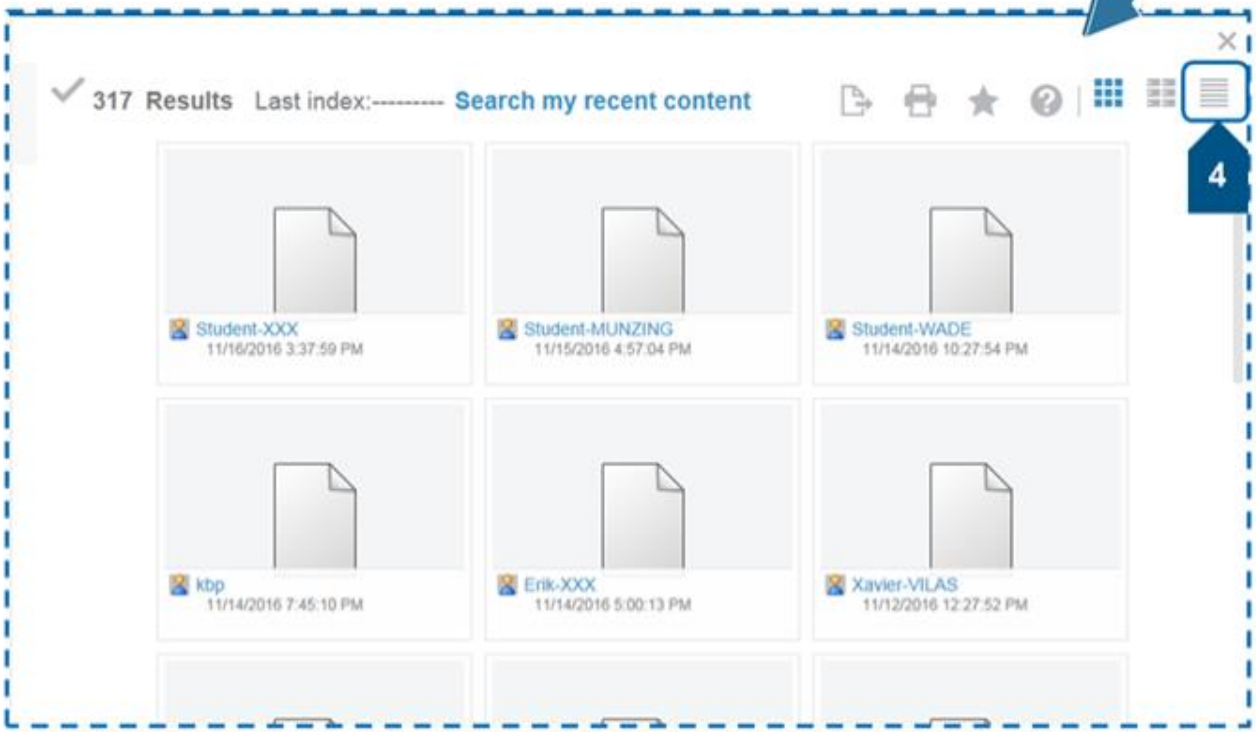


Add Members to the Workspace (2/5)

3. In the page toolbar, click the **Add Member** icon.

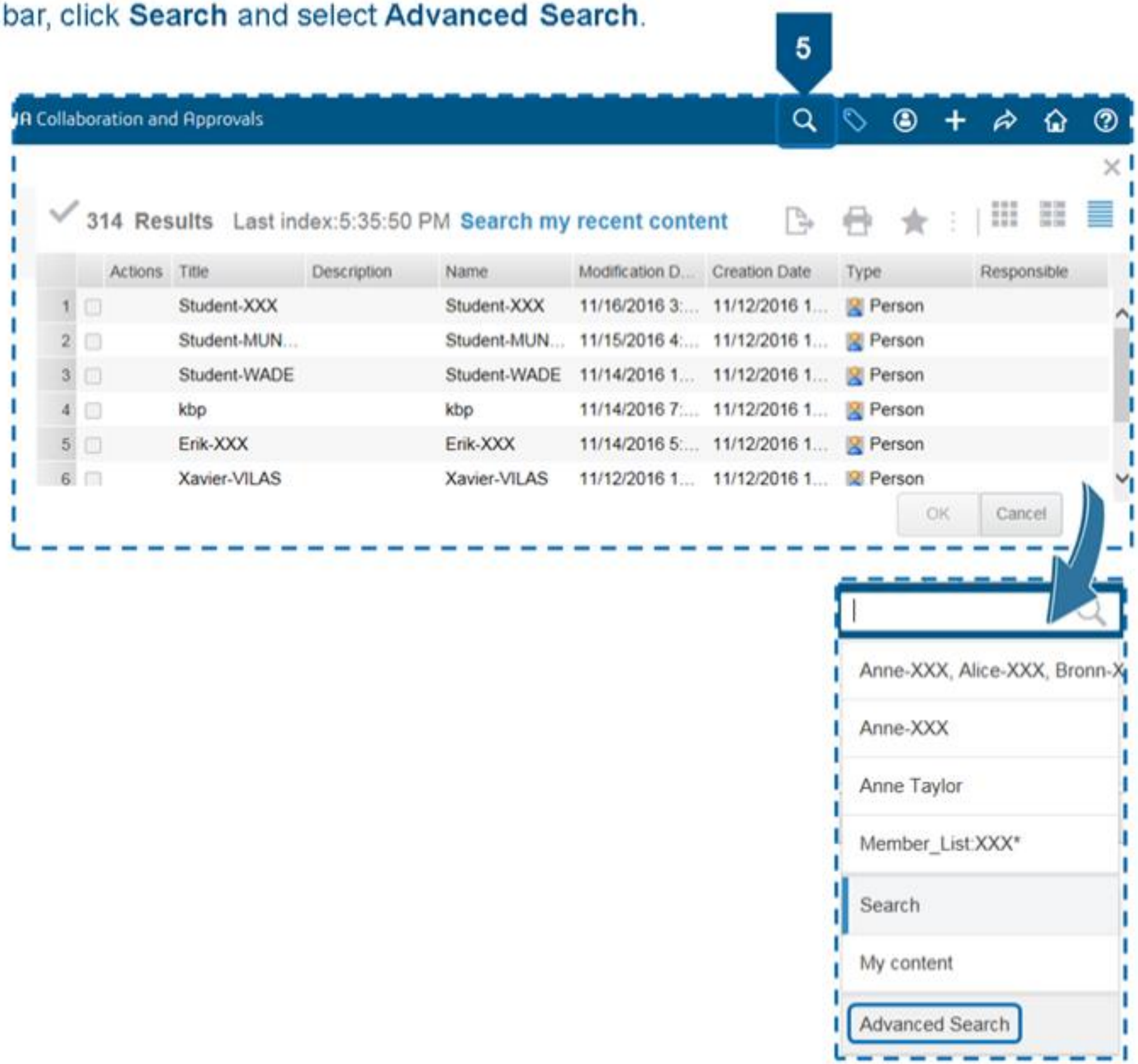


4. Click the icon to change the view to **Data Grid View**.



Add Members to the Workspace (3/5)

5. In the top bar, click **Search** and select **Advanced Search**.



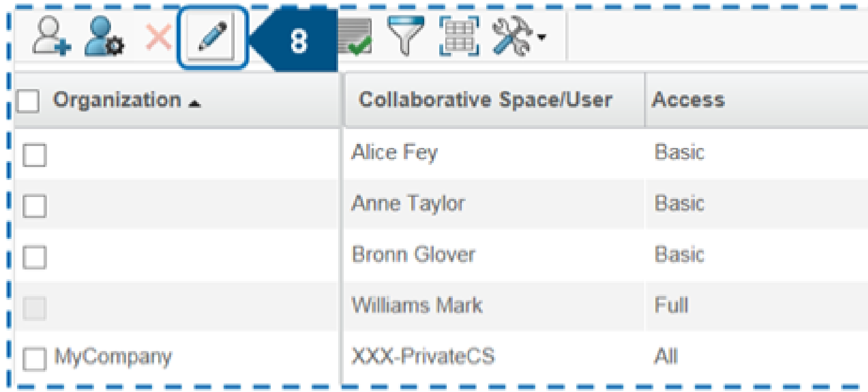
Add Members to the Workspace (4/5)

6. In the **Full Text Field**, enter [*XXX*] and click **Search**.

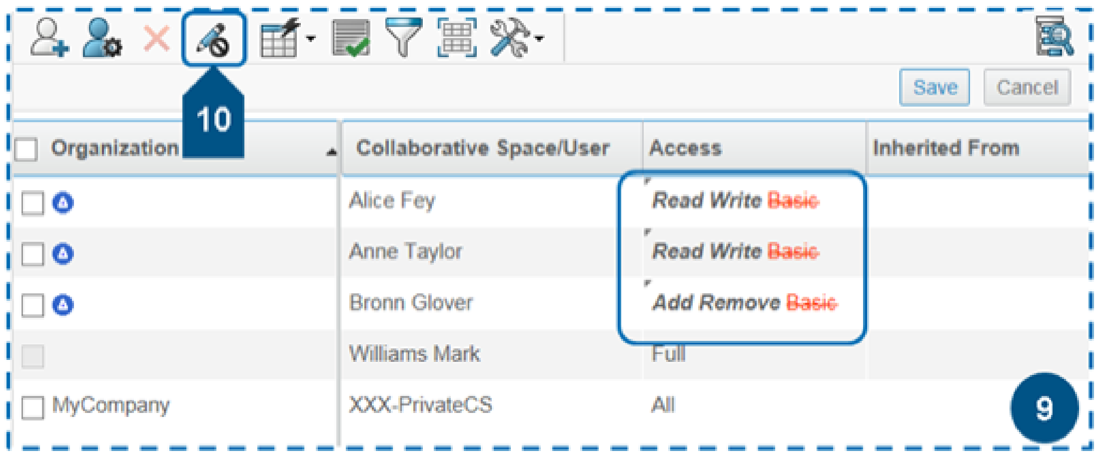
7. Select the persons as shown and click **OK**.

Add Members to the Workspace (5/5)

8. In the page toolbar, click **Enable Edit** to modify the member accesses.



9. Edit the accesses as shown and save the changes.

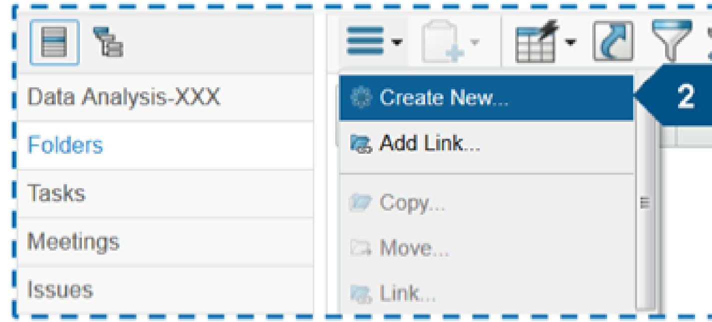


10. Exit the edit mode using the **Disable Edit** button.

Add Folders to the Workspace (1/2)

1. In the category tree, select **Folders**.

2. In the page toolbar, select **Actions > Create New…**.

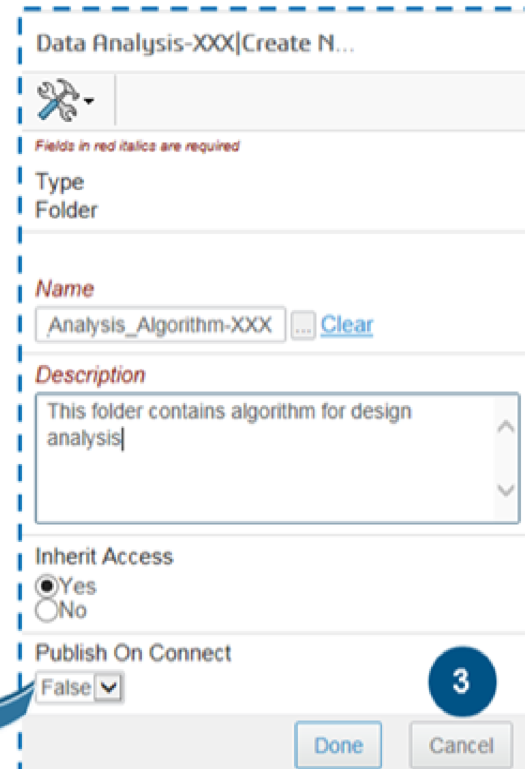


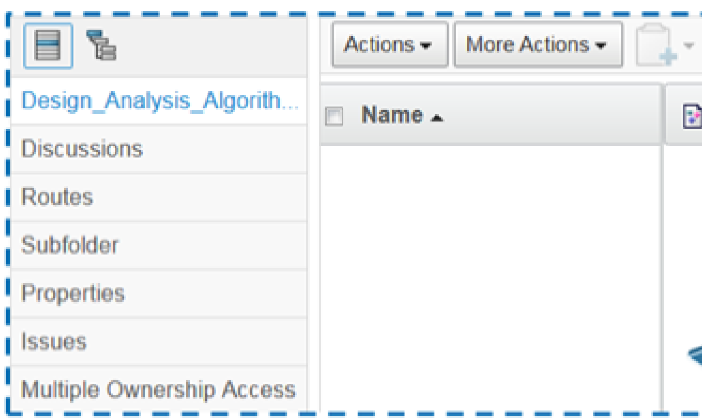
3. Specify the following details, and click **Done**:

   a. **Name**: [Design_Analysis_Algorithm-XXX]

   b. **Description**: [This folder contains the algorithm for design analysis]

   c. **Inherit Access**: **Yes**

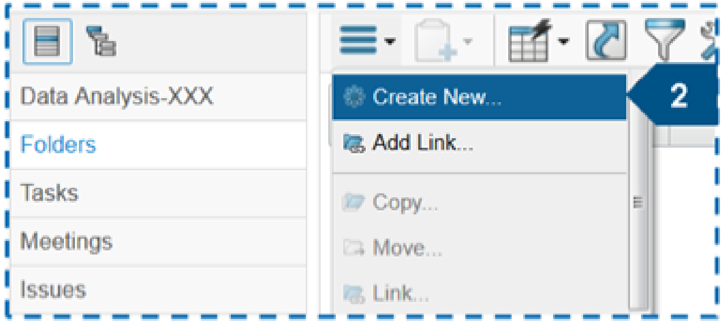




Add Folders to the Workspace (1/2)

1. In the category tree, select **Folders**.

2. In the page toolbar, select **Actions > Create New…**.

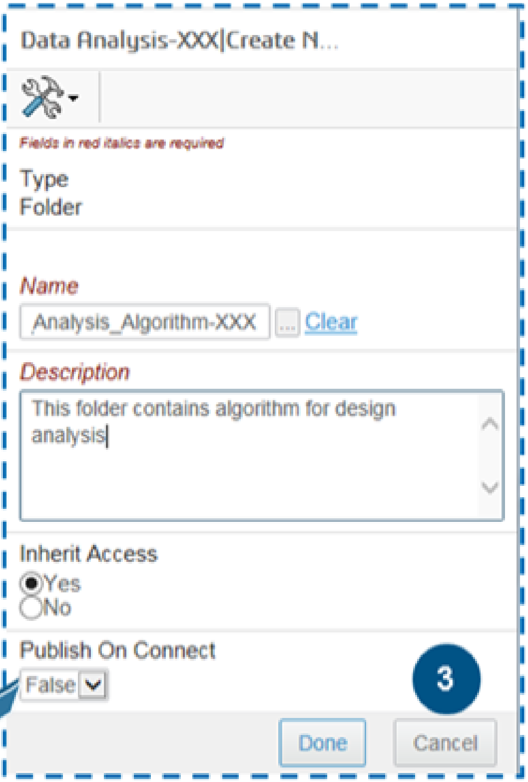


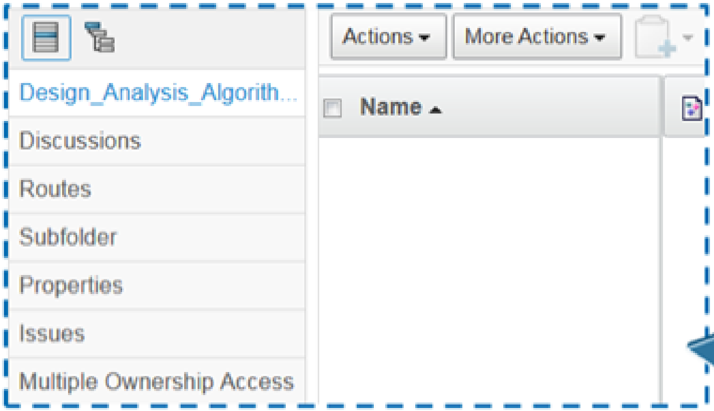
3. Specify the following details, and click **Done**:

   a. **Name**: [Design_Analysis_Algorithm-XXX]

   b. **Description**: [This folder contains the algorithm for design analysis]

   c. **Inherit Access**: **Yes**



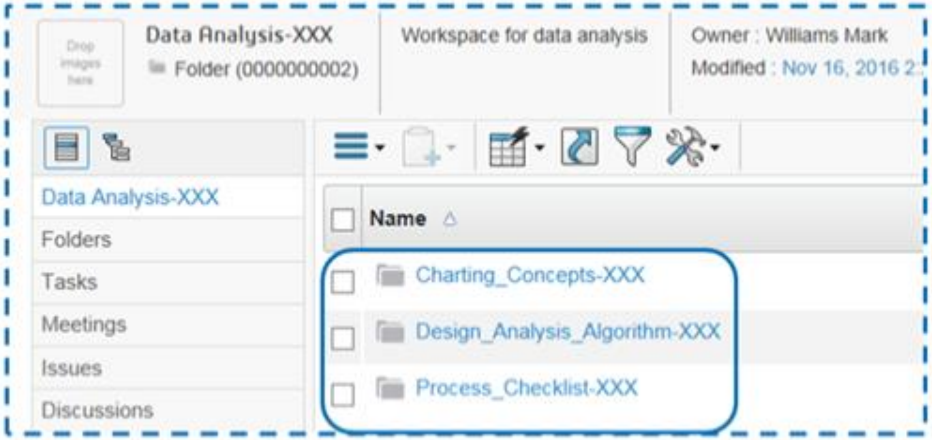


Add Folders to the Workspace (2/2)

4. Click **Back** to navigate to the **Data Analysis-XXX** workspace's **Folders** page.

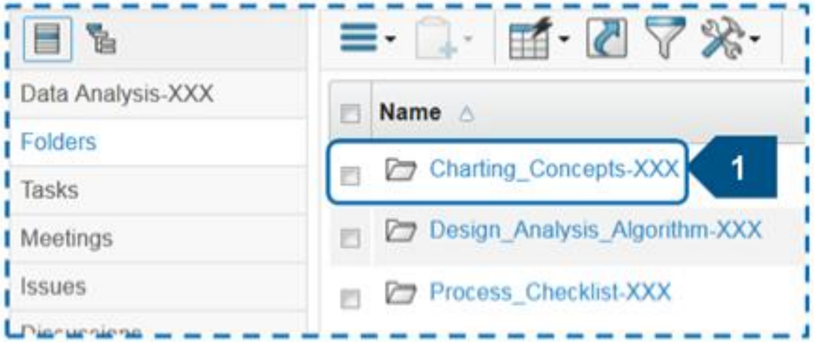
5. Add two more folders with the following details:
   a. Folder 1:
      i. **Name** and **Description**: [Process_Checklist-XXX]
      ii. **Inherit Access**: **Yes**

   b. Folder 2:
      i. **Name** and **Description**: [Charting_Concepts-XXX]
      ii. **Inherit Access**: **Yes**

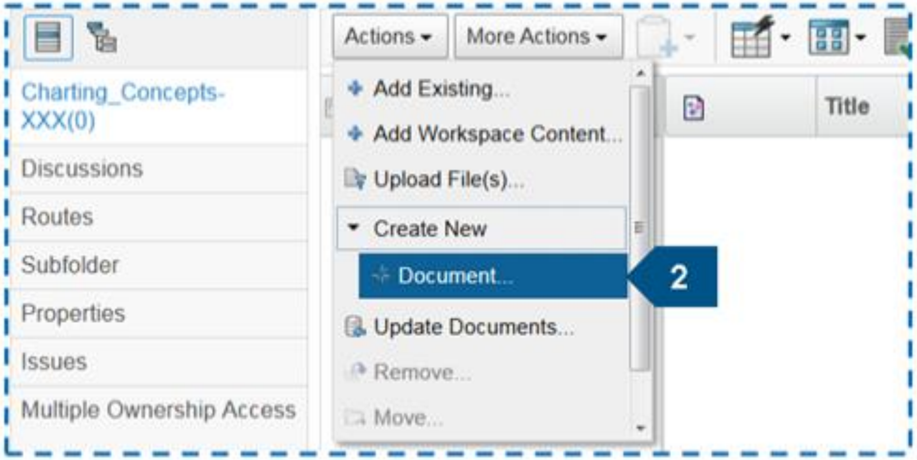


Add Content to Folders (1/4)

1. Click the **Charting_Concepts-XXX** folder.

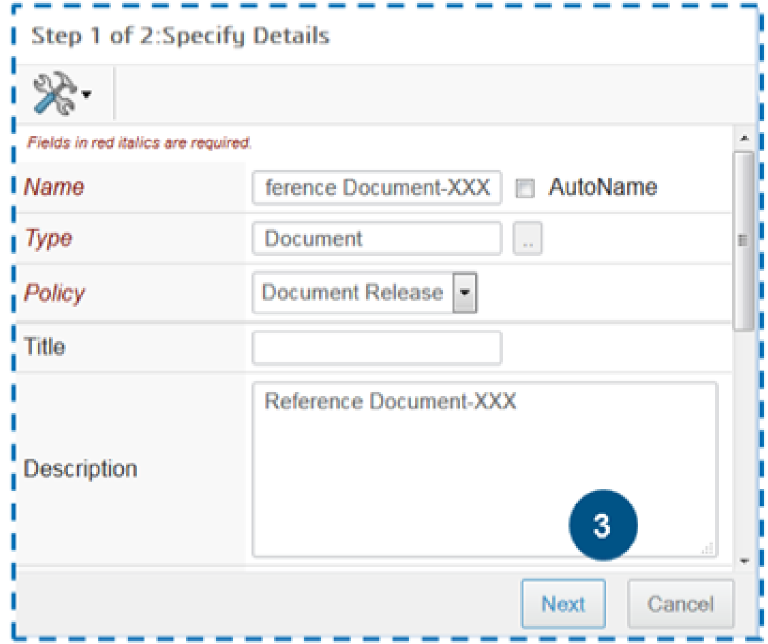


2. In the page toolbar, select **Actions > Create New > Document…**.

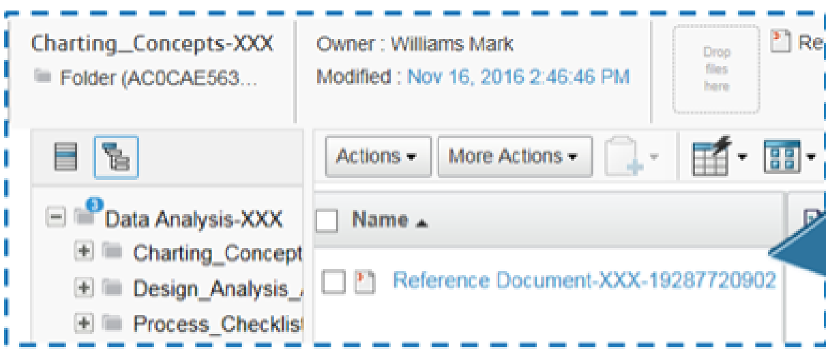


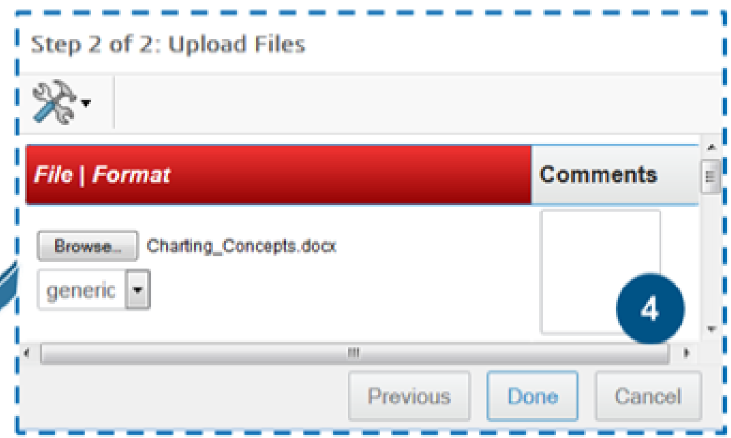
Add Content to Folders (2/4)

3. Specify the following details and click **Next**.
   a. **Name** and **Description**:
      [Reference Document-XXX]



4. Upload the file *Charting_Concepts* from the location *C:\ BUPS_R2017x_Data*, and click **Done**.

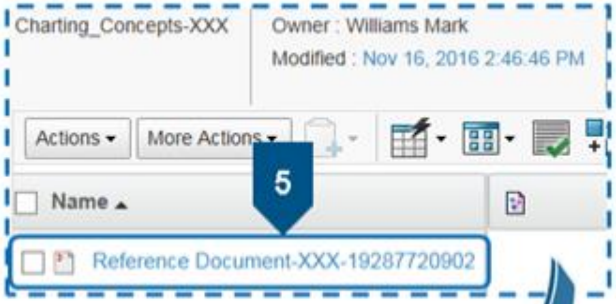




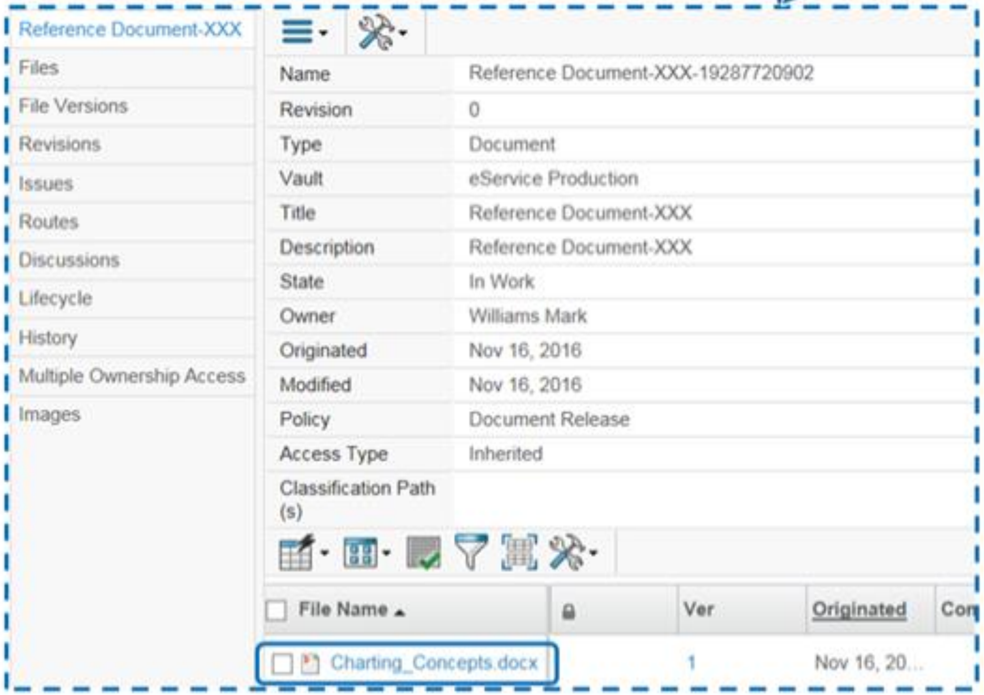
Add Content to Folders (3/4)

5. Click the document name to view the file that you uploaded.

   Observe that the file is attached to the document.

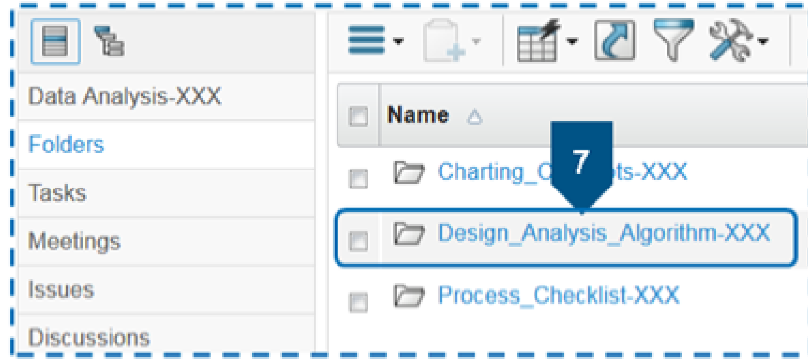


6. Navigate to the **Folders** page of the workspace.

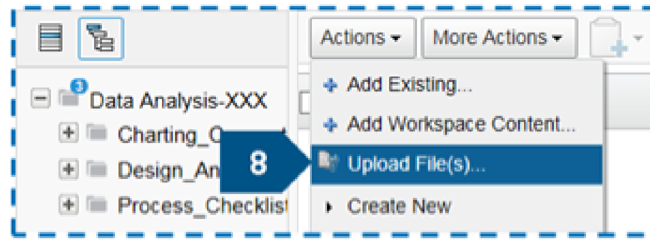


Add Content to Folders (4/4)

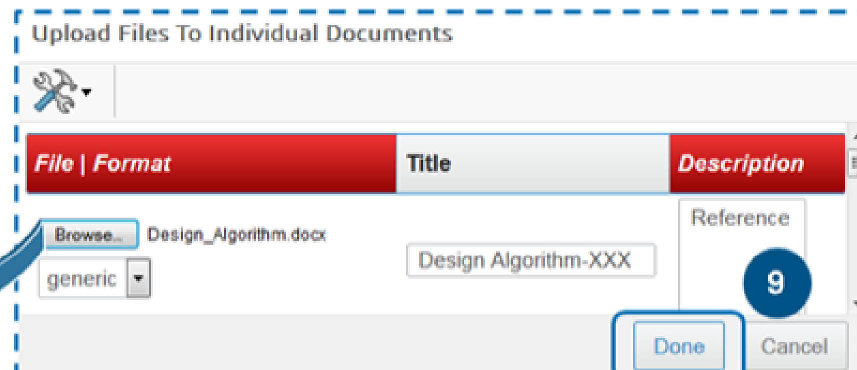
7. Click the **Design_Analysis_Algorithm-XXX** folder.

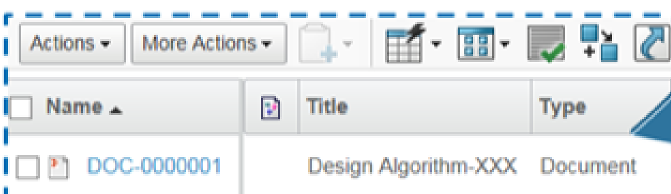


8. In the page toolbar, select **Actions > Upload File(s)**….



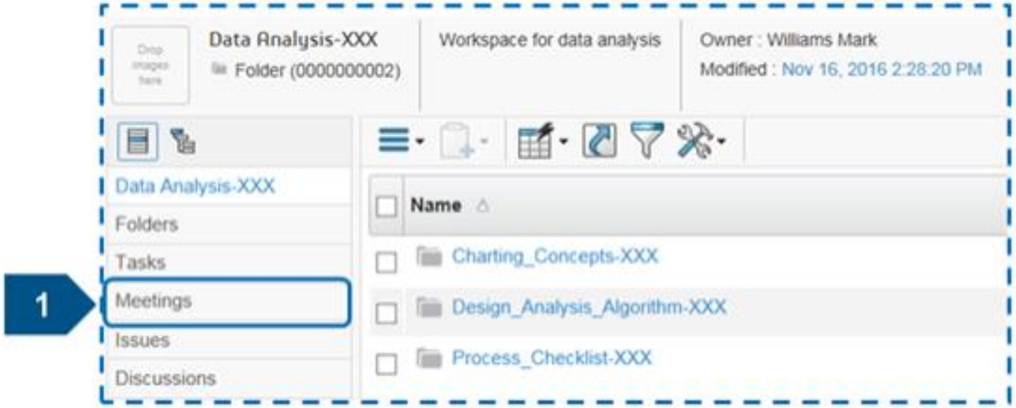
9. Upload the *Design_Algorithm.docx* file from the location *C:\BUPS_R2017x_Data*. Specify the following details, and click **Done**:
   a. **Title**: [Design Algorithm-XXX]
   b. **Description**: [Reference]



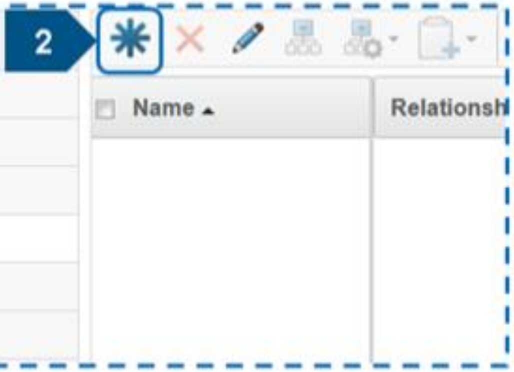


Create a Meeting (1/2)

1. Navigate to the **Meetings** page of the **Data Analysis-XXX** workspace.



2. In the page toolbar, click **Create New**.



Create a Meeting (2/2)

3. Specify the following details, and click **Done**.

   a. **Name**: [Knowledge Transfer Session-XXX]

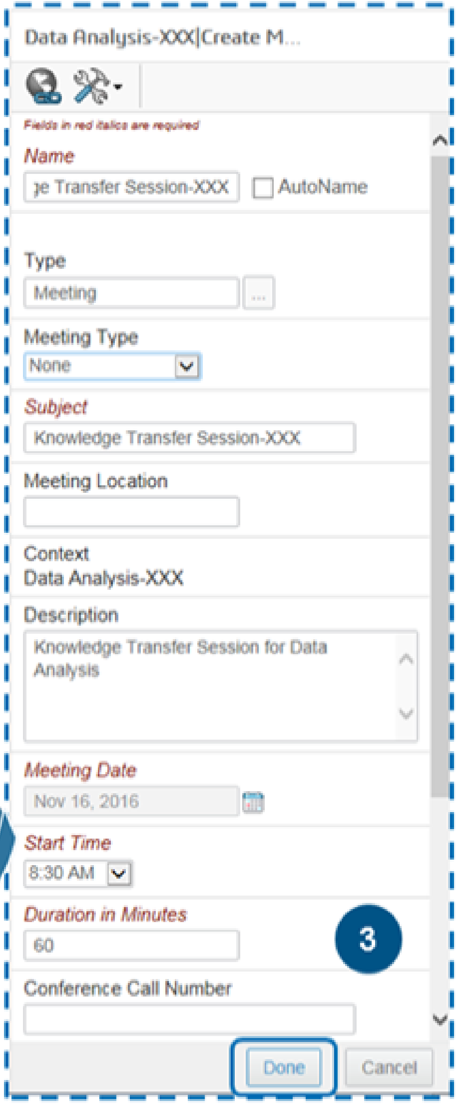
   b. **Subject**: [Knowledge Transfer Session-XXX]

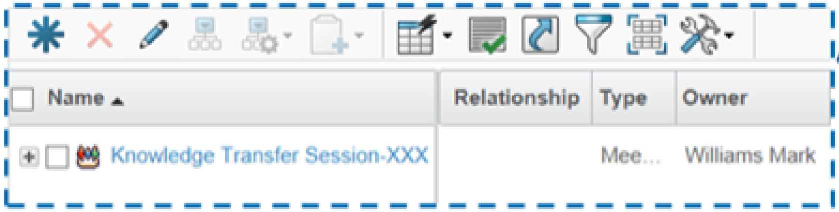
   c. **Description**: [Knowledge Transfer Session for Data Analysis]

   d. **Meeting Date**: (Specify today's date)

   e. **Start Time**: (Specify a time after four hours from now)

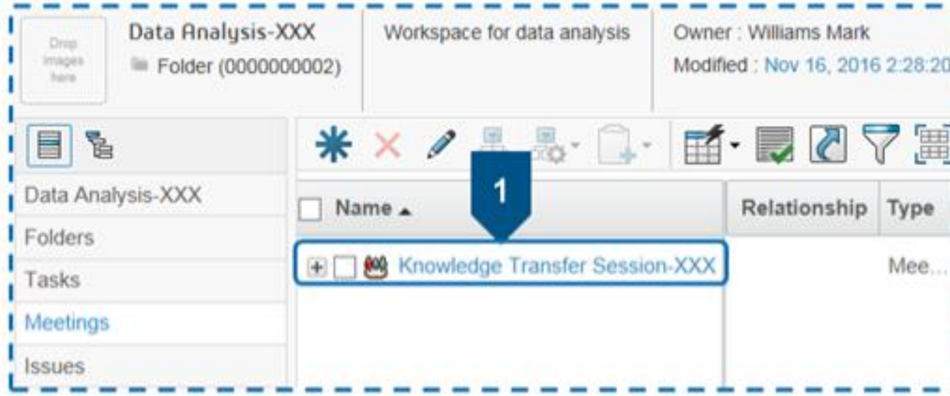
   f. **Duration In Minutes**: [60]



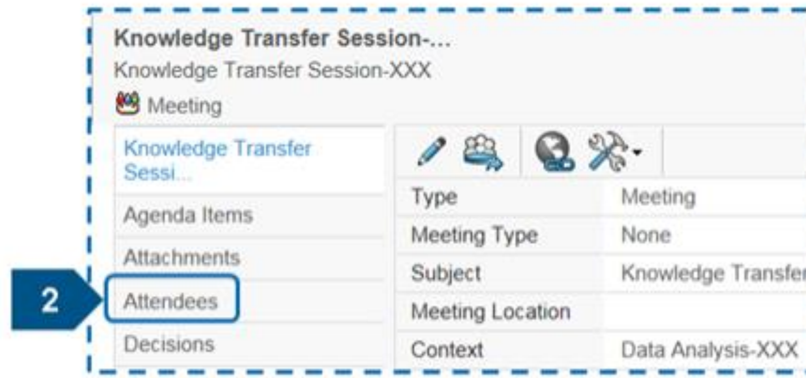


Add Attendees to the Meeting (1/2)

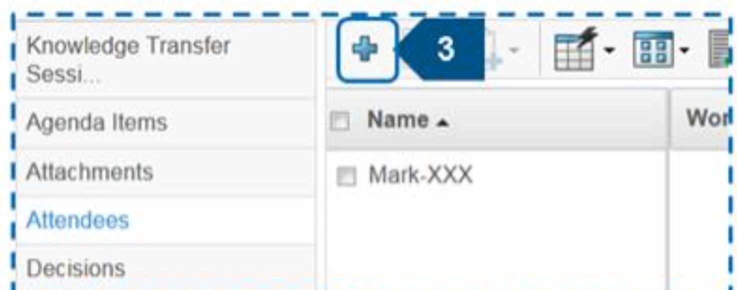
1. Click the meeting's name.



2. In the category tree, select **Attendees**.



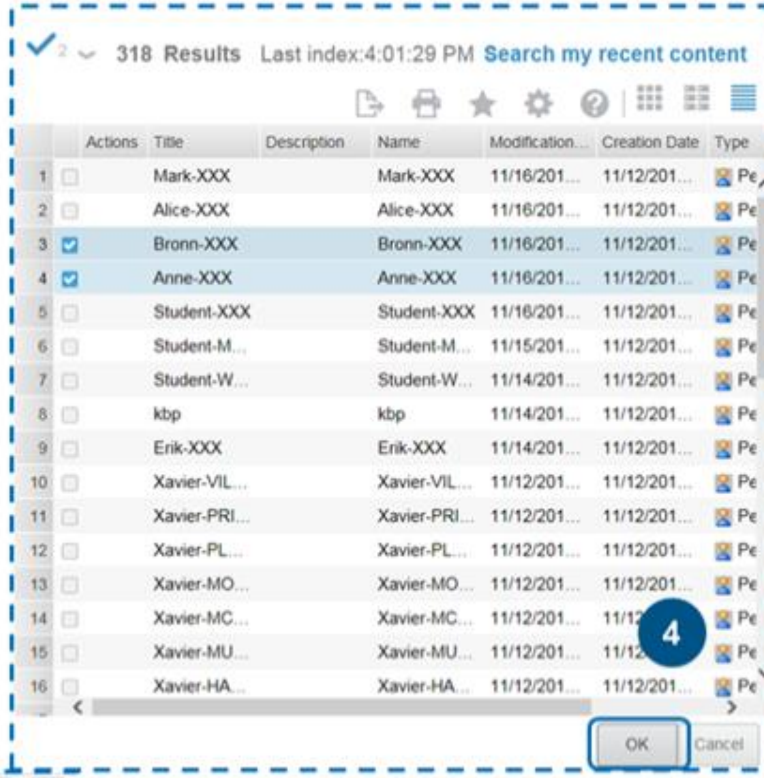
3. In the page toolbar, select **Add Attendee**.

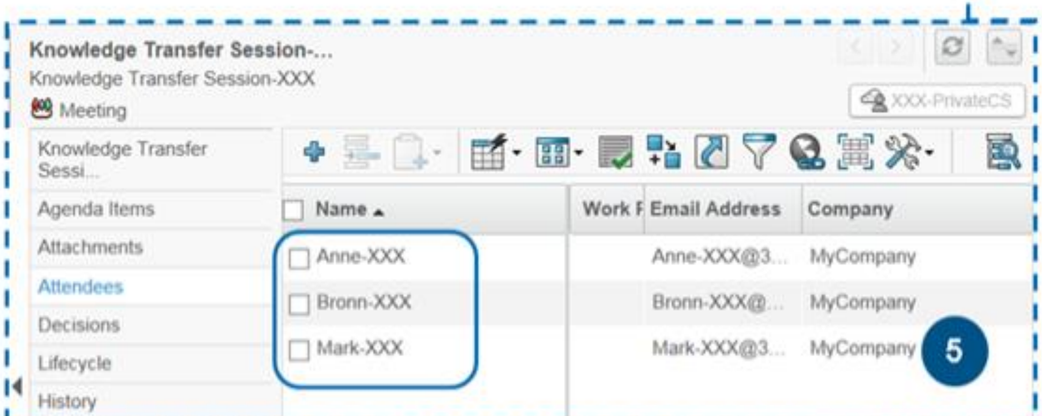


Add Attendees to the Meeting (2/2)

4. Search and select the persons as shown and Click **OK**.

5. Close the dialog box and refresh the page.

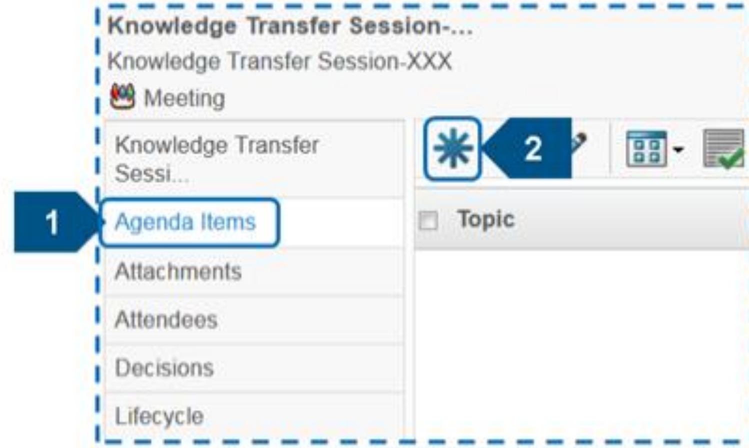




Add an Agenda Item for the Meeting

1. In the category tree, select **Agenda Items**.

2. In the page toolbar, click **Create New Agenda Item**.

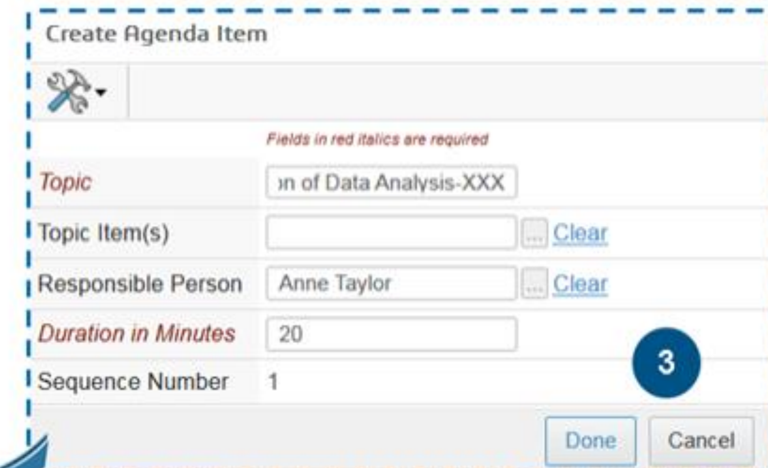


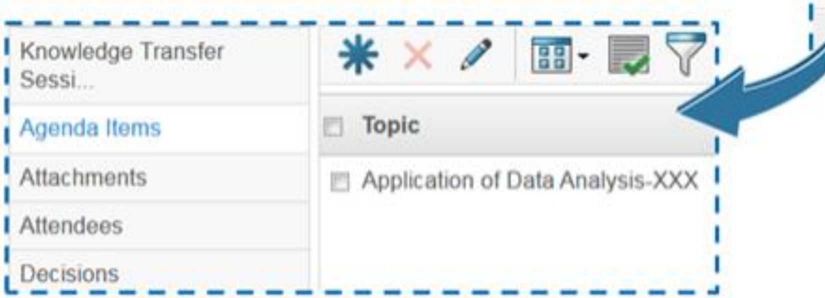
3. Specify the following details, and click **Done**:

   a. **Topic**: [Application of Data Analysis-XXX]

   b. **Responsible Person**: **Anne XXX**

   c. **Duration in Minutes**: [20]

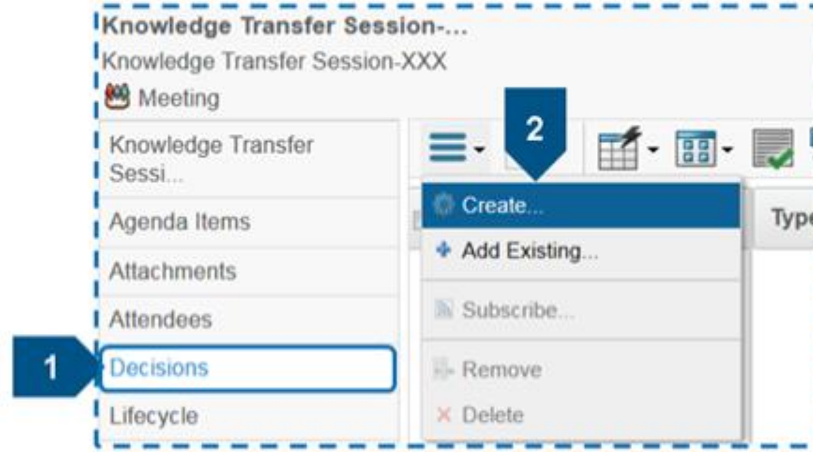




Create a Decision for the Meeting

1. In the category tree, select **Decisions**.

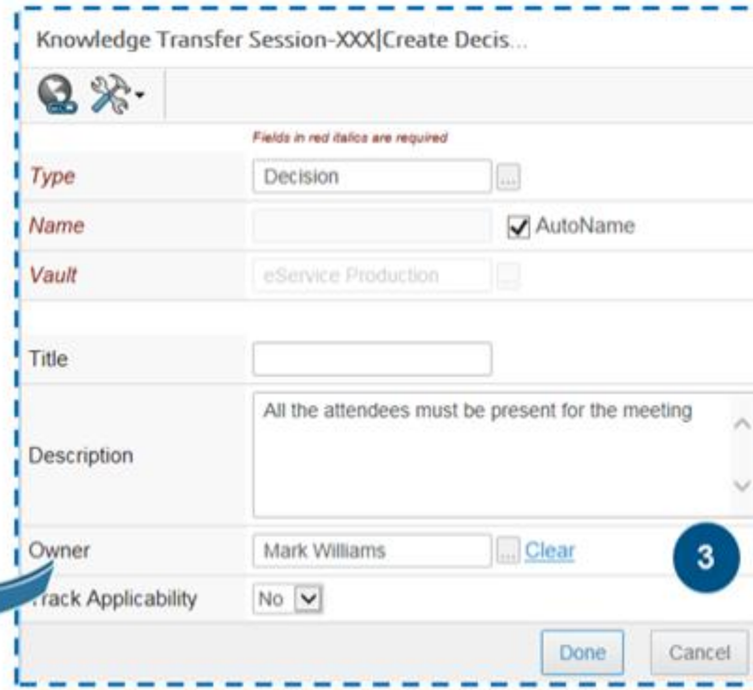
2. In the page toolbar, select **Actions > Create…**.

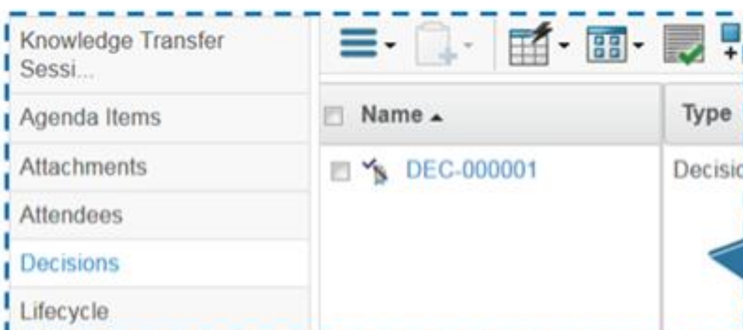


3. Specify the following details, and click **Done**:

   a. **Name**: Select the **AutoName** check box.

   b. **Description**: [All the attendees must be present for the meeting]

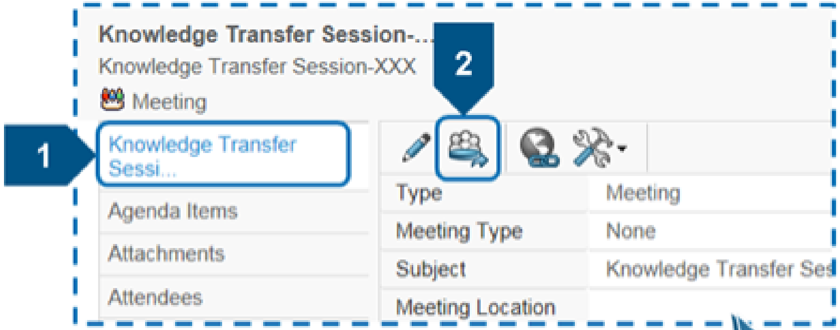




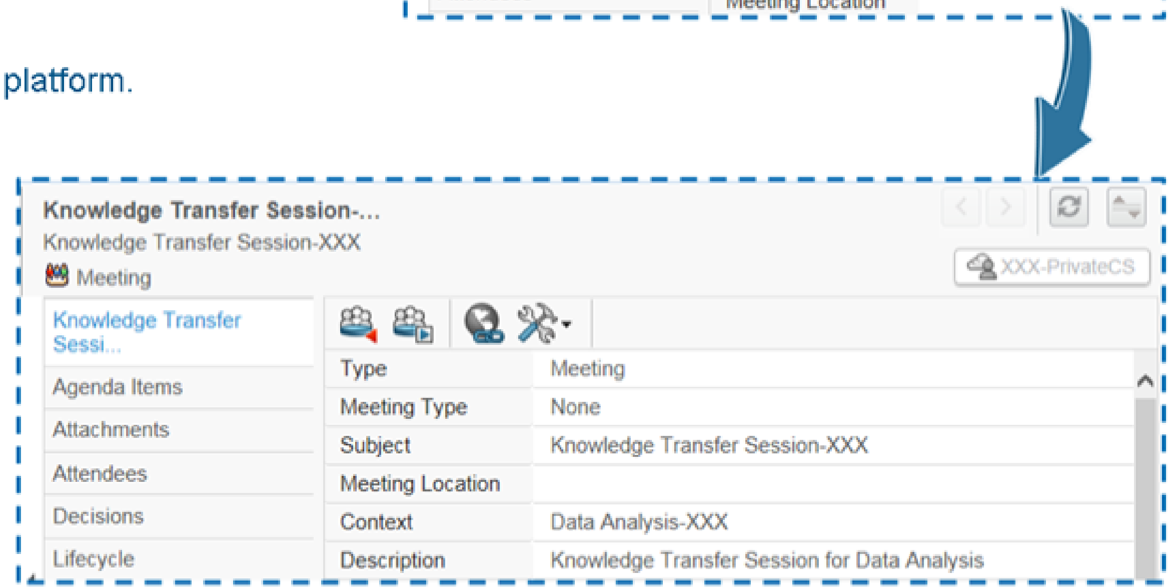
Send Invitation for the Meeting

1. In the category tree, select **Knowledge Transfer Session-XXX**.

2. In the page toolbar, click **Send Invitations**.



3. Log out of the **3D**EXPERIENCE platform.



View the Meeting Invitation Using the My Desk Menu (1/2)

1. Log in to the **3D**EXPERIENCE platform with the following credentials:

   a. **Username or email**: [Bronn-XXX]

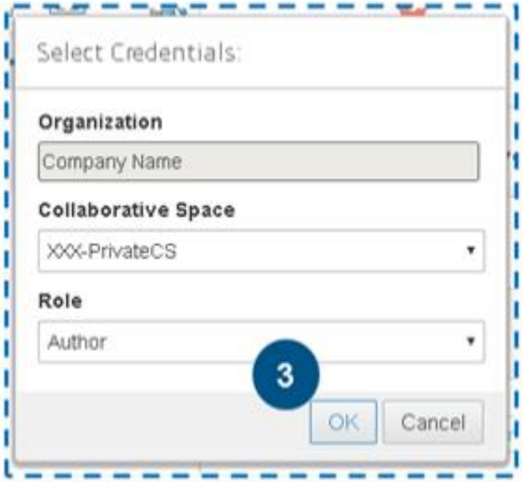
   b. **Password**: [Bronn-XXX]

2. In a top bar, select **Me** > **My Credentials**.

3. Select the following credentials, and click **OK**:

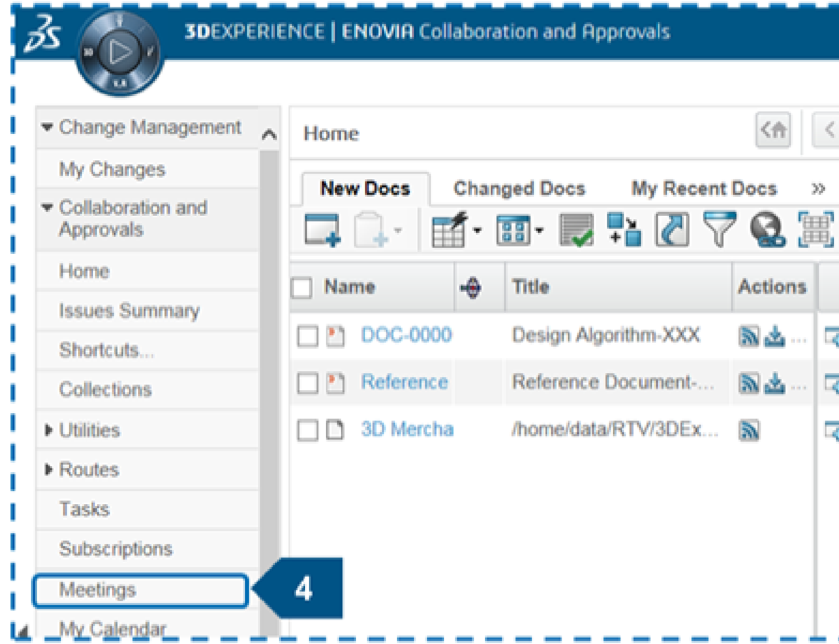
   a. **Collaborative Space**: **XXX-PrivateCS**

   b. **Role**: **Author**

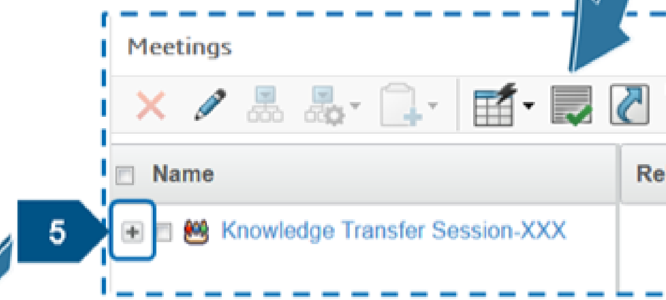


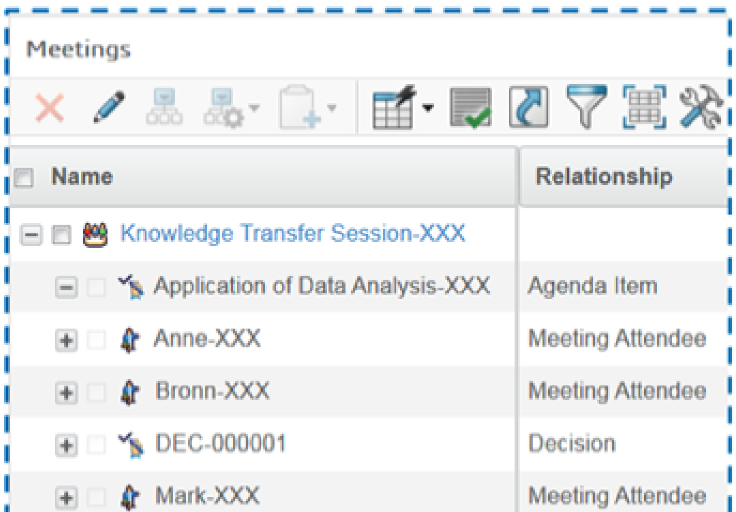
View the Meeting Invitation Using the My Desk Menu (2/2)

4. In the **My Desk** menu, select **Collaboration and Approvals > Meetings**.



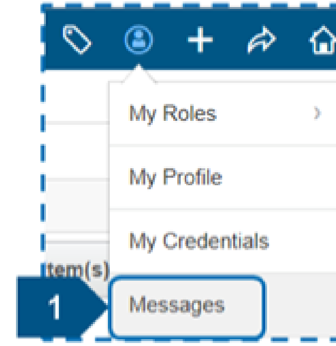
5. Expand the **Knowledge Transfer Session-XXX** meeting to view its agenda item, decision and attendees.



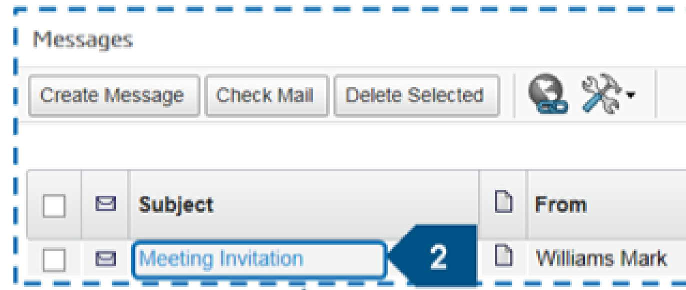


View the Meeting Invitation Using the Me Menu

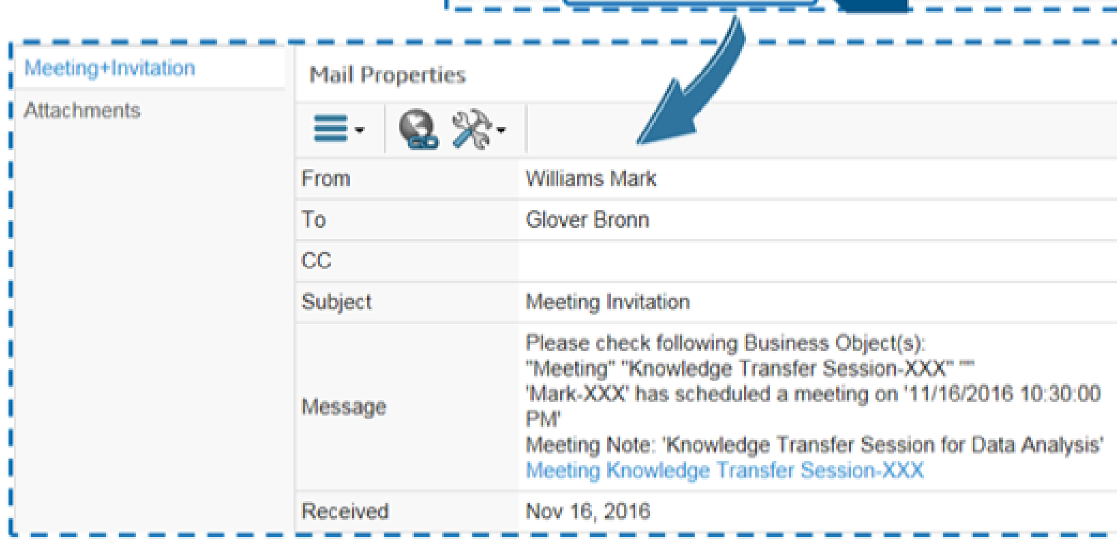
1. In the top bar, select **Me > Messages**.



2. Click the **Meeting Invitation** to view its details.



3. Close the window, and log out of the **3D**EXPERIENCE platform.

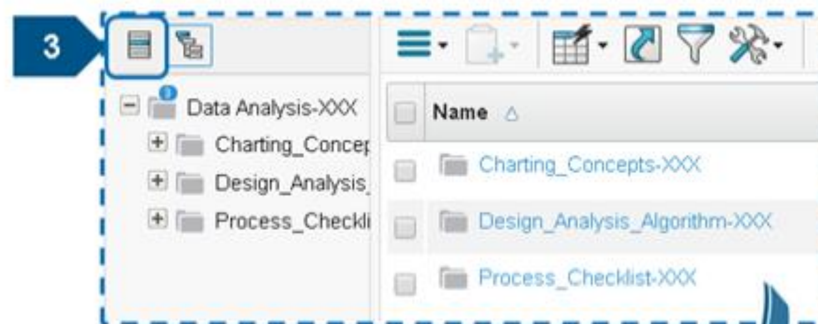


Create a Discussion for the Workspace (1/2)

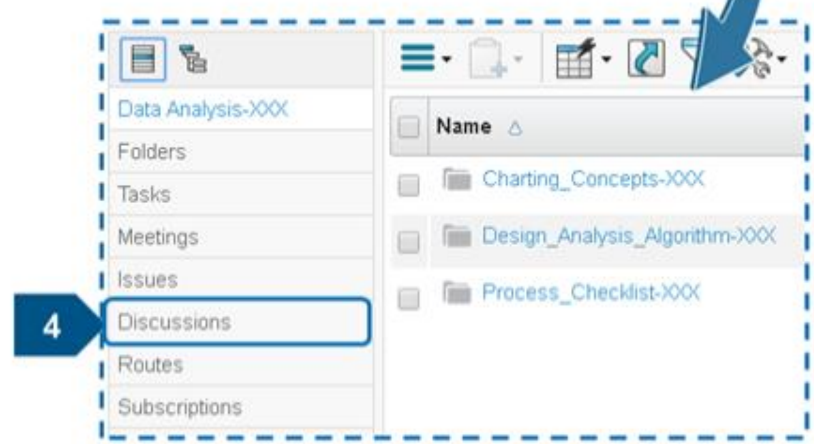
1. Log in to the **3D**EXPERIENCE platform with the following credentials:
    a. **Username or email**: [Mark-XXX]
    b. **Password**: [Mark-XXX]

2. Navigate to the **Data Analysis-XXX** workspace.

3. Select the **Categories** icon.



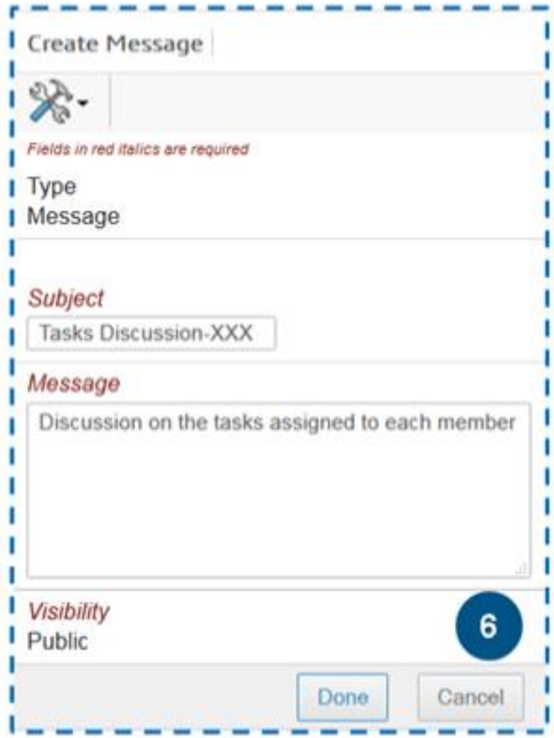
4. In the category tree, select **Discussions**.



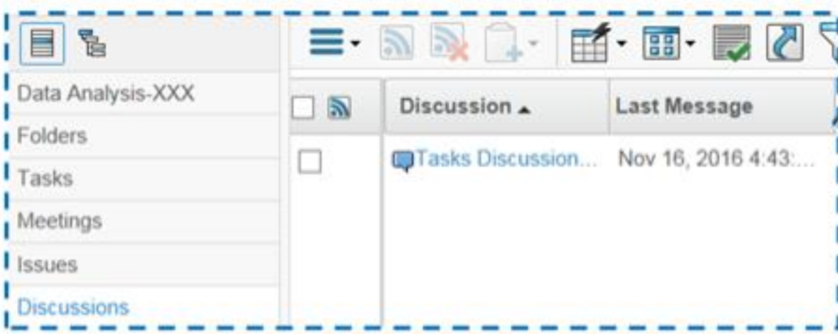
Create a Discussion for the Workspace (2/2)

5. In the page toolbar, select **Actions > Create Public Discussion...**.

6. Specify the following details and click **Done**:
   a. **Subject**: [Tasks Discussion-XXX]
   b. **Message**: [Discussion on the tasks assigned to each member]

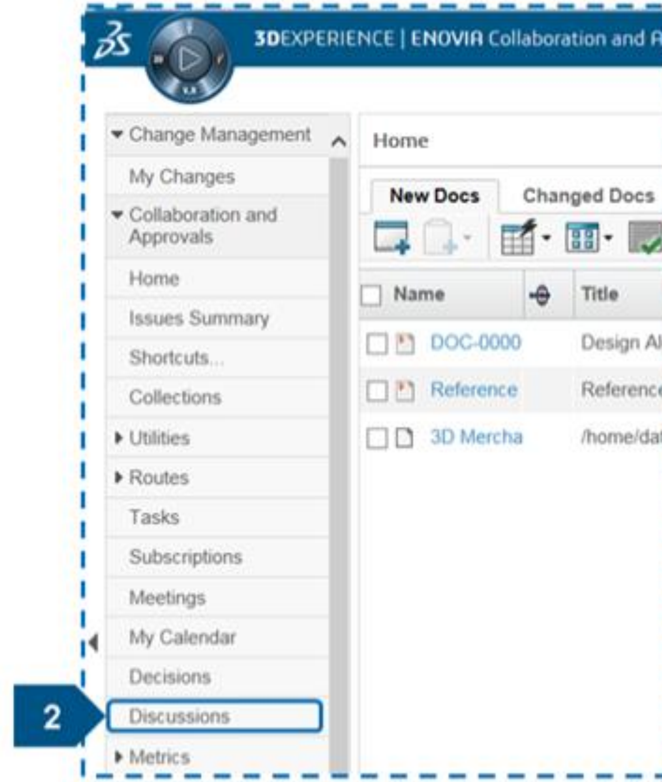


7. Log out of the **3D**EXPERIENCE platform.



Reply to the Discussion (1/2)

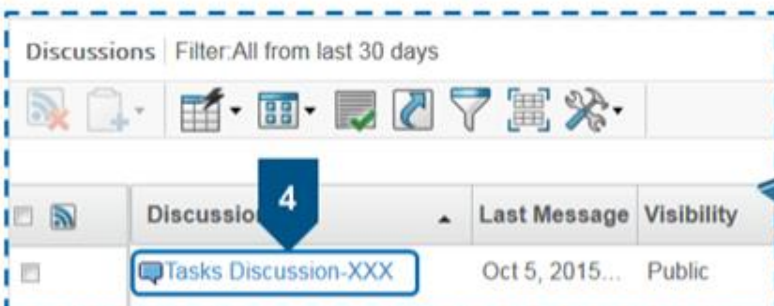
1. Log in to the **3D**EXPERIENCE platform with the following credentials:
   a. **Username or email**: [Bronn-XXX]
   b. **Password**: [Bronn-XXX]

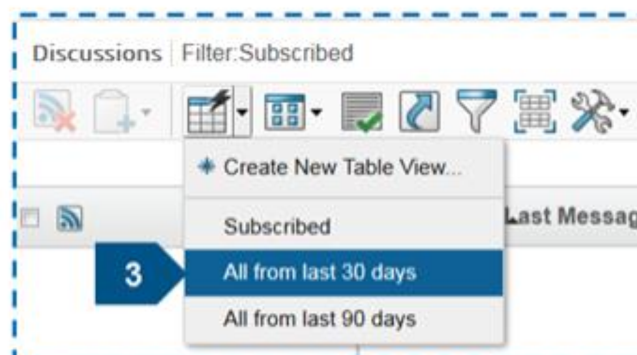


2. In the **My Desk** menu, select **Collaboration and Approvals > Discussions**.

3. In the page toolbar, select **View > All from last 30 days** filter option to display the ongoing discussion.

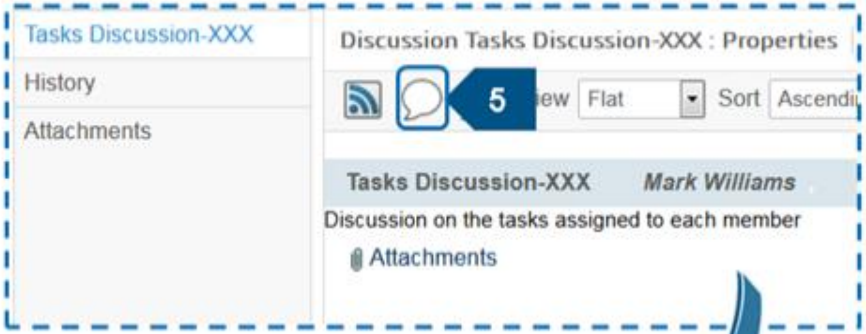
4. Click **Task Discussion-XXX** to reply to the thread.



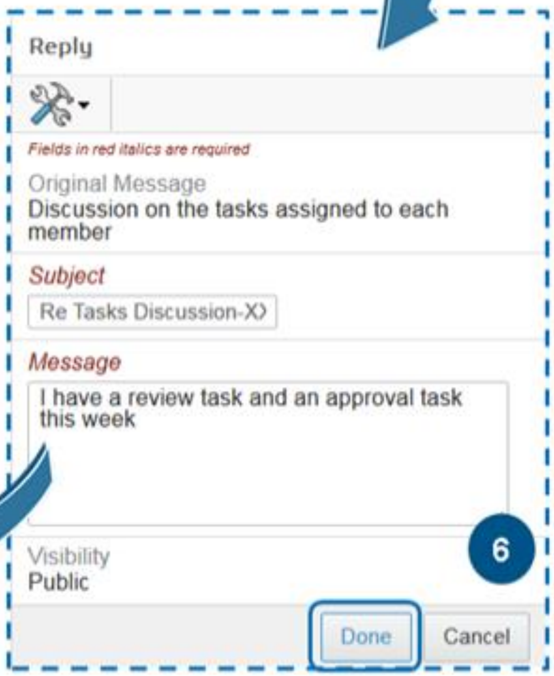


Reply to the Discussion (2/2)

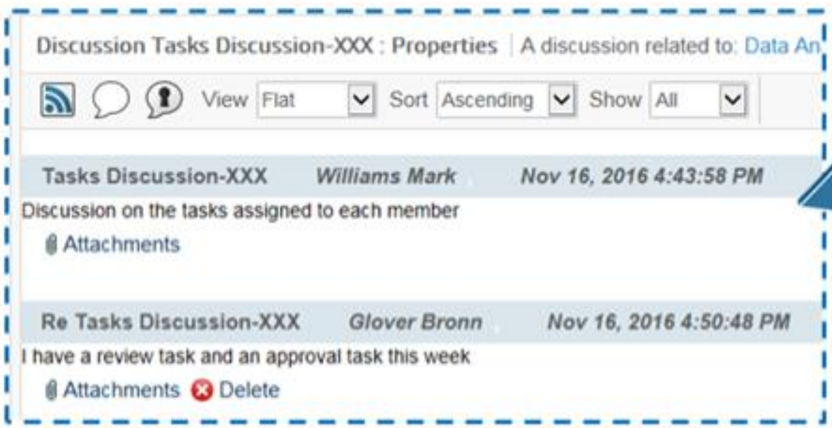
5. In the page toolbar, click **Public Reply**.



6. Specify the following details, and click **Done**:
   a. **Subject**: (Keep the default)
   b. **Message**: [I have a review task and an approval task this week]



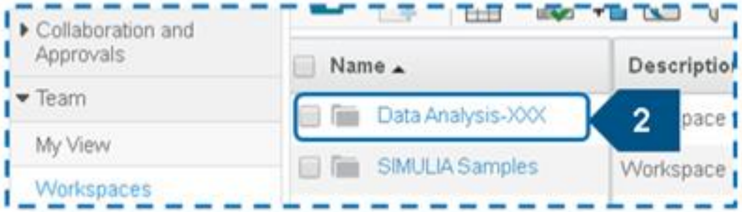
7. Log out of the **3D**EXPERIENCE platform.



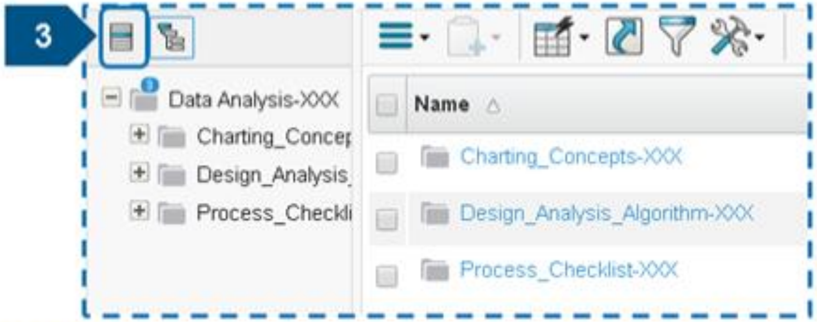
Save the Workspace as a Template (1/2)

1. Log in to the **3D**EXPERIENCE platform with the following credentials:
   a. **Username or email**: [Mark-XXX]
   b. **Password**: [Mark-XXX]

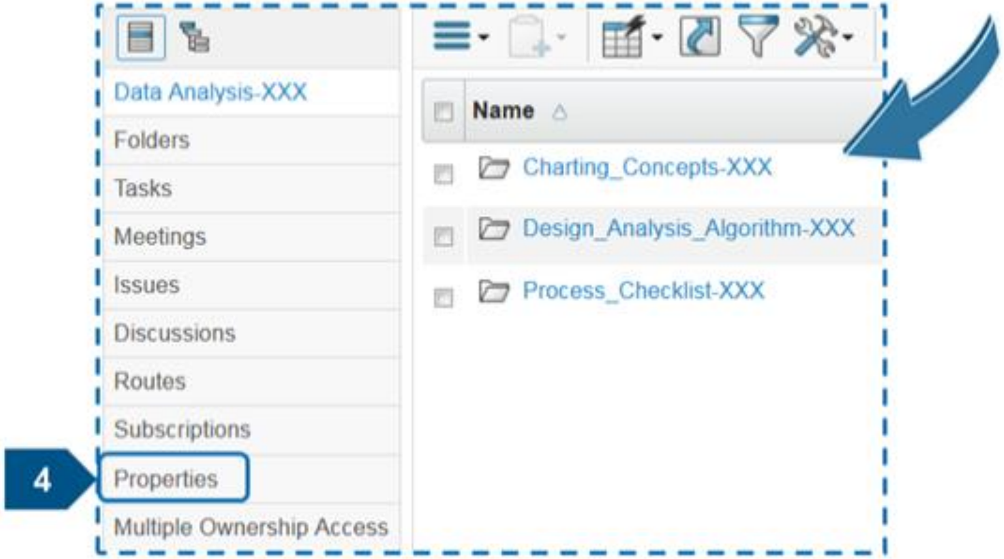
2. Navigate to the **Data Analysis-XXX** workspace.



3. Select the **Categories** icon.

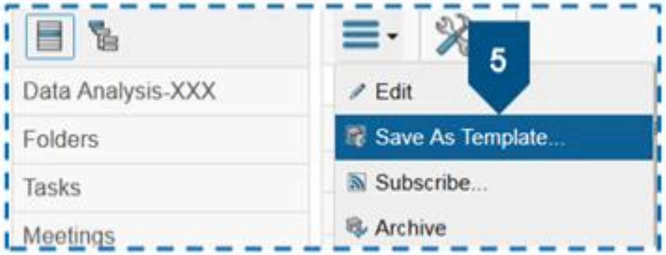


4. In the category tree, select **Properties**.

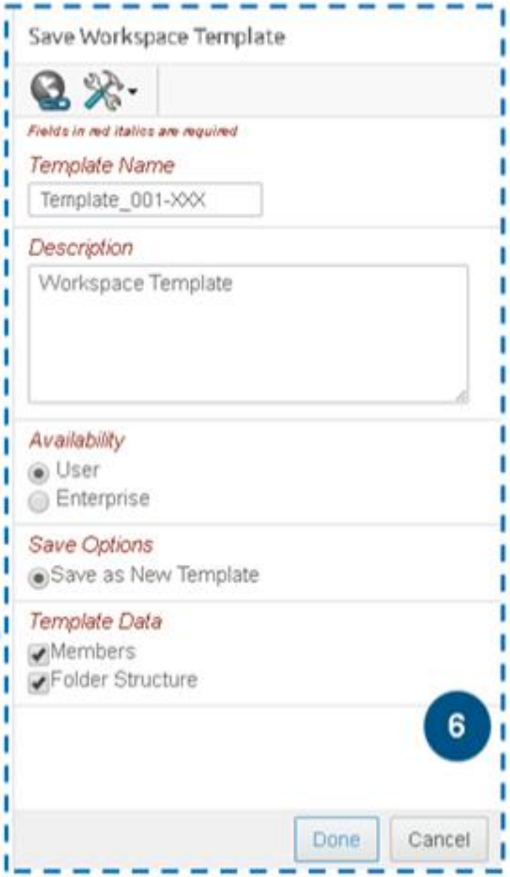


Save the Workspace as a Template (2/2)

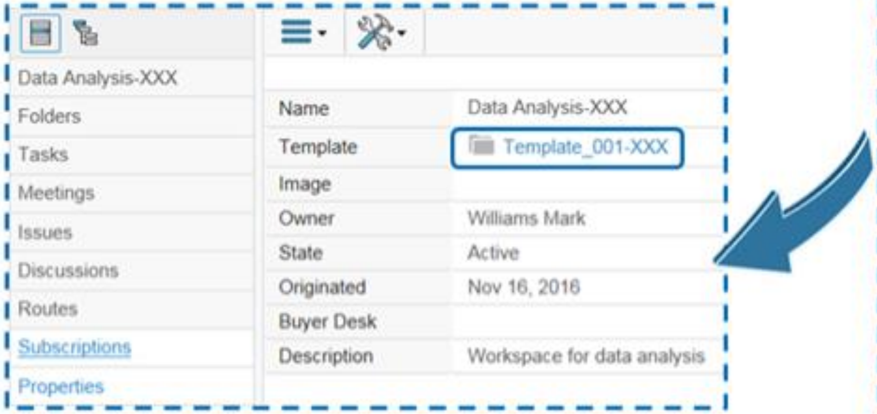
5. In the page toolbar, select **Actions > Save As Template...**.



6. Specify the following details and click **Done**:
   a. **Template Name**: [Template_001-XXX]
   b. **Description**: [Workspace Template]
   c. **Availability**: (Keep the default value)
   d. **Save Options**: (Keep the default value)
   e. **Template Data**: (Keep the default value)



Observe that the workspace automatically gets associated with the new template.



Recap: Create a Workspace Structure

In this exercise, you have:

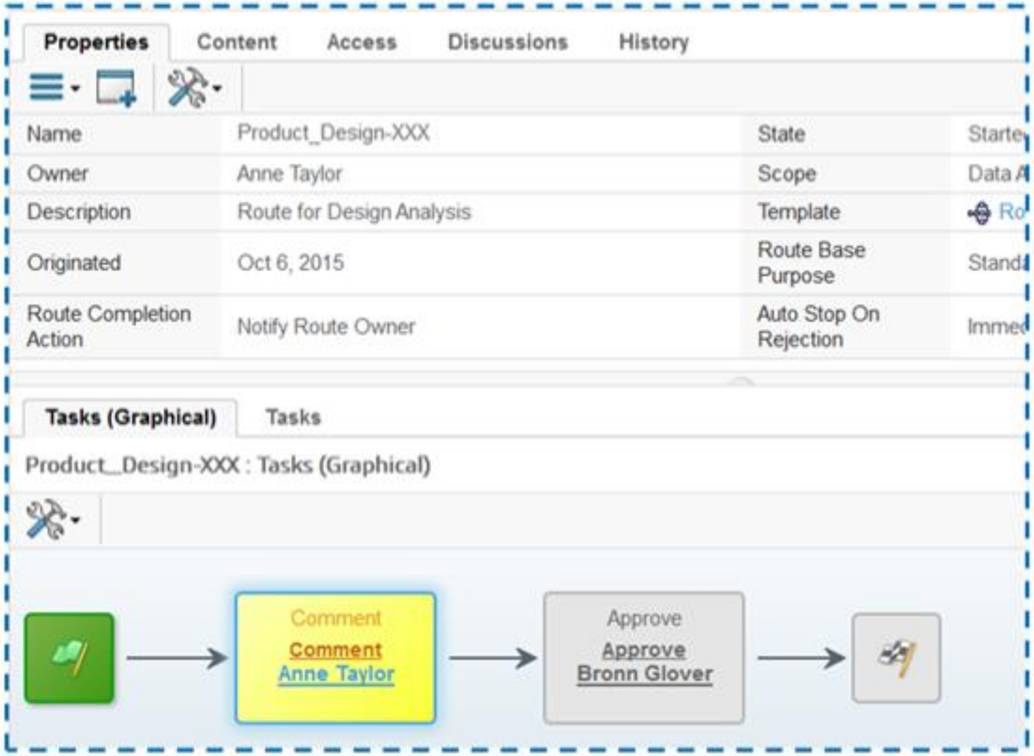
- ✓ Created a workspace
- ✓ Added folders and members to the workspace
- ✓ Created a meeting and added an agenda item
- ✓ Added attendees for the meeting
- ✓ Added a decision to the meeting
- ✓ Created a discussion thread about the workspaces
- ✓ Saved the workspace as a template

Exercise: Create a Workflow using Routes

Now, you will log in as Mark and create routes for the workflow processes. You will add the members and assign them their respective tasks.

By the end of this exercise you will be able to:

1. Create a route using the wizard
2. Save the route as a template
3. Create a new route template



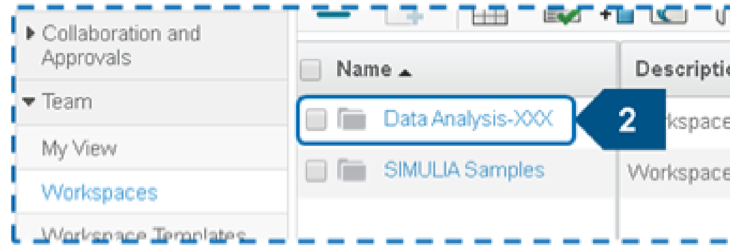
45 minutes

Exercise Progression

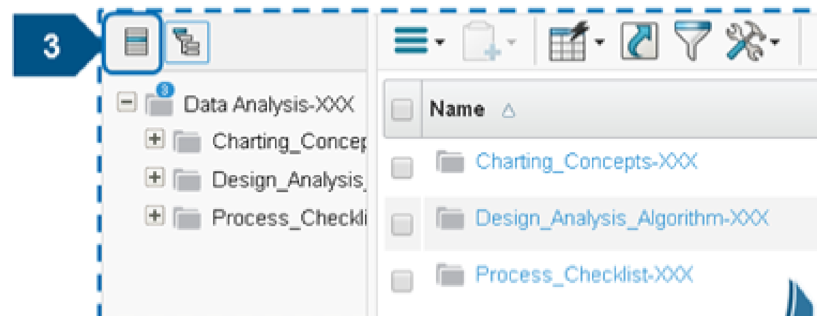
Create a Route (1/8)

1. Ensure that you are logged in as *Mark-XXX*.

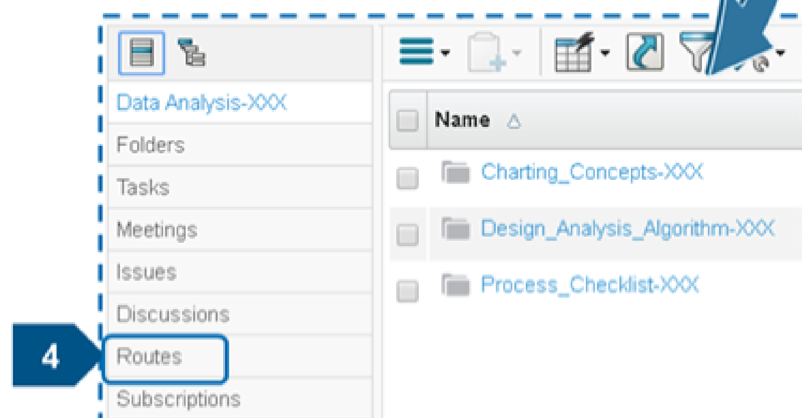
2. Navigate to the **Data Analysis-XXX** workspace.



3. Select the **Categories** icon.



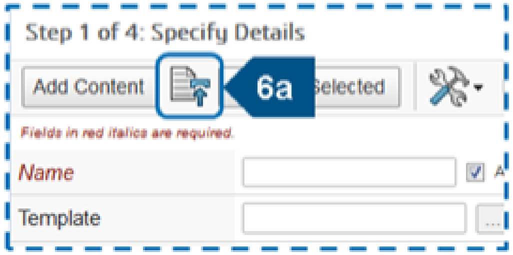
4. In the category tree, select **Routes**.



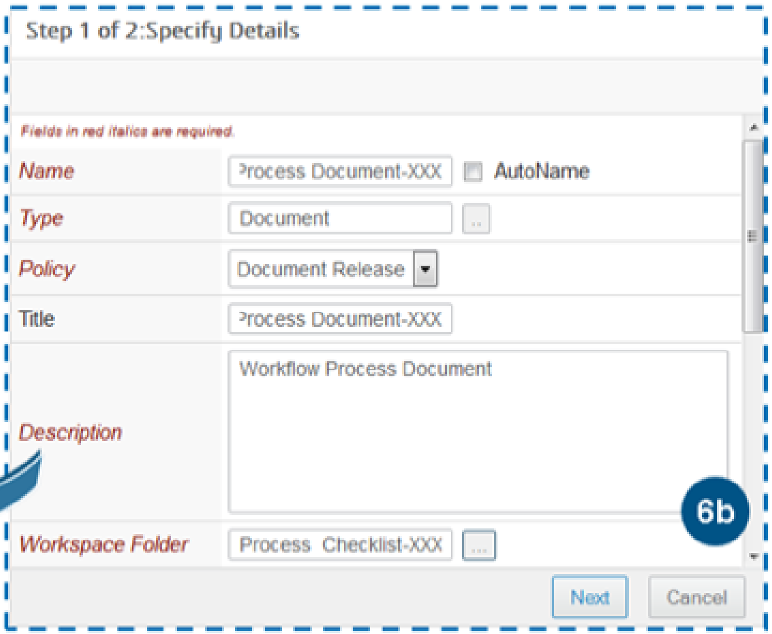
Create a Route (2/8)

5. In the page toolbar, select **Actions > Create Route Wizard…**.

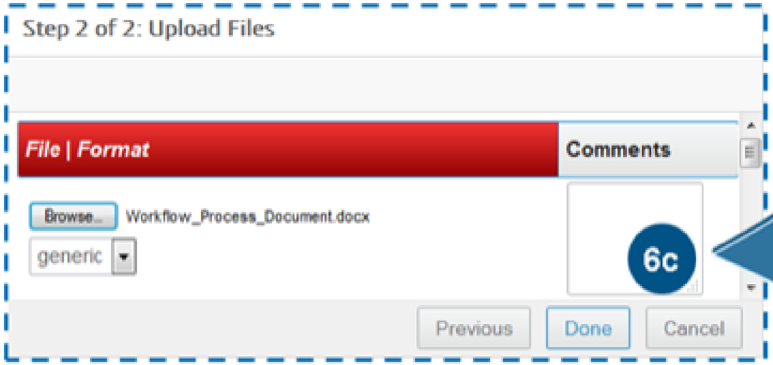
6. Add content to the route.
   a. In the **Specify Details** dialog box, click the **Upload External File** icon.



   b. Specify the document details as shown, and click **Next**.

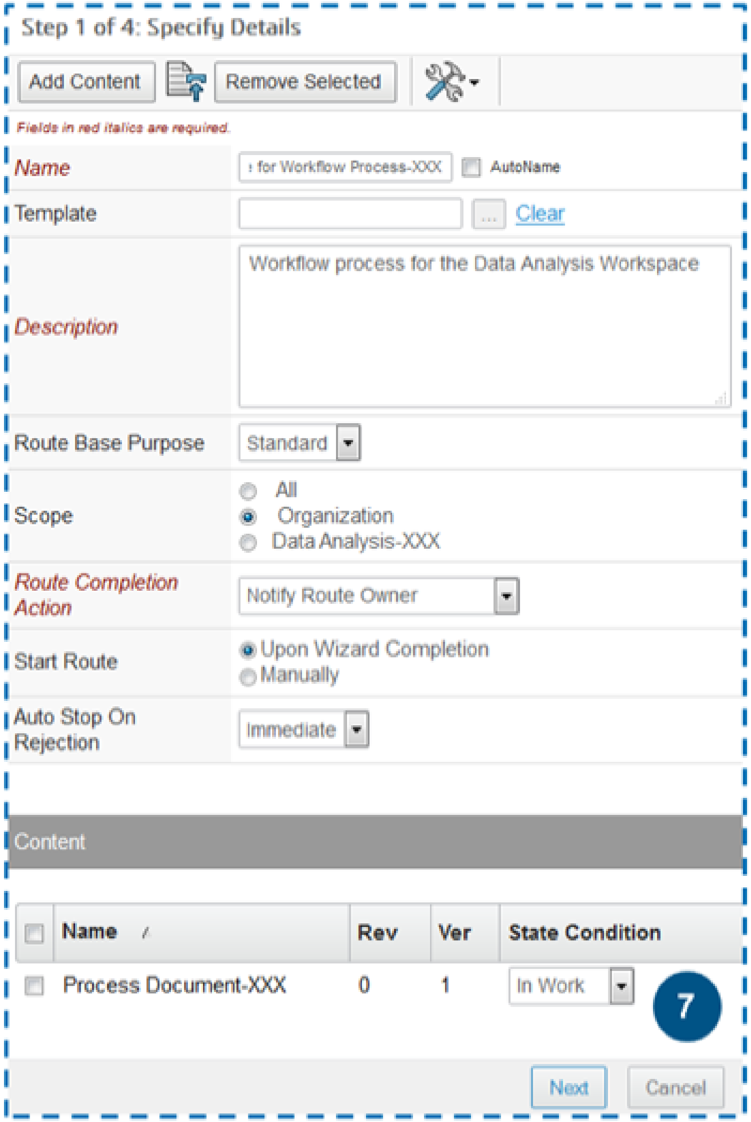


   c. Upload the *Workflow_Process_Document* from the location *C:\BUPS_R2017x_Data*, and click **Done**.



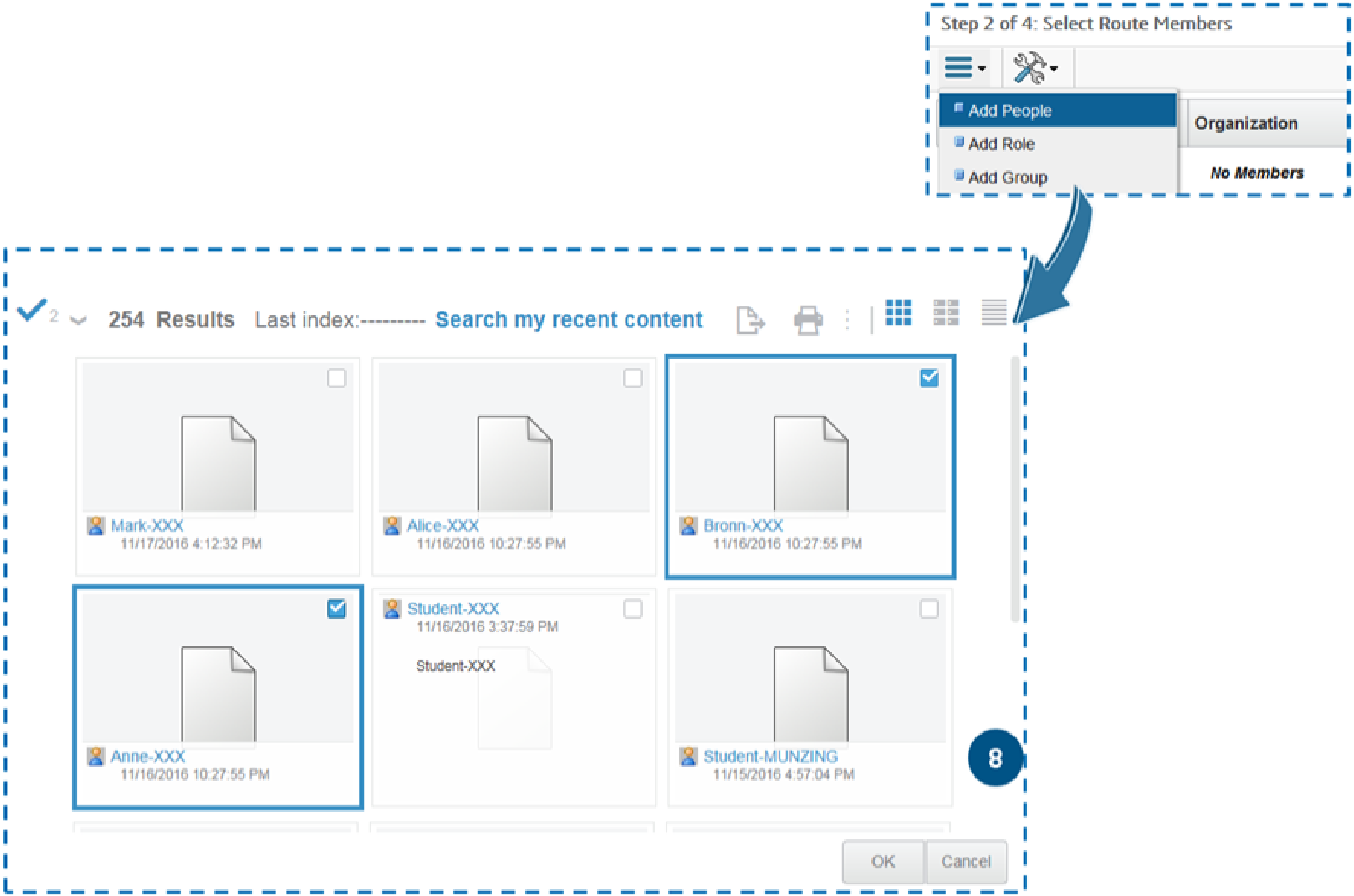
Create a Route (3/8)

7. Specify the following details for the route, and click **Next**.
   a. **Name**: [Route for Workflow Process-XXX]
   b. **Description**: [Workflow process for the Data Analysis Workspace]
   c. **Scope**: **Organization**
   d. **Route Completion Action**: **Notify Route Owner**
   e. **Start Route**: **Upon Wizard Completion**



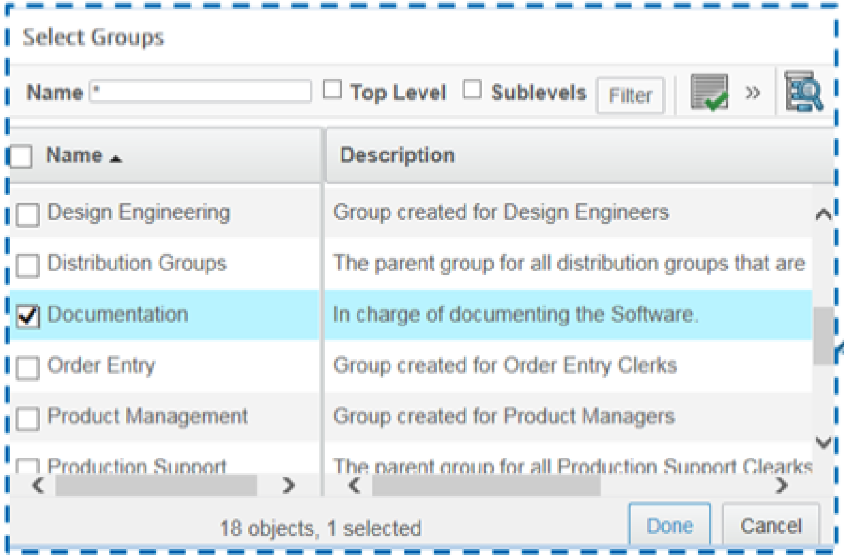
Create a Route (4/8)

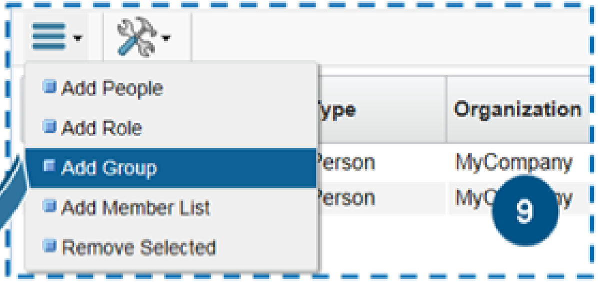
8. In the toolbar, select **Actions > Add People** to add **Bronn-XXX** and **Anne-XXX** as route members.



Create a Route (5/8)

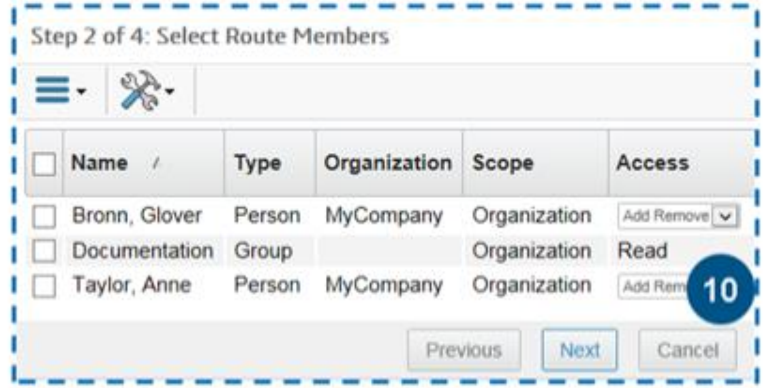
9. Similarly, select **Actions > Add Group** to add the **Documentation** group as a route member.



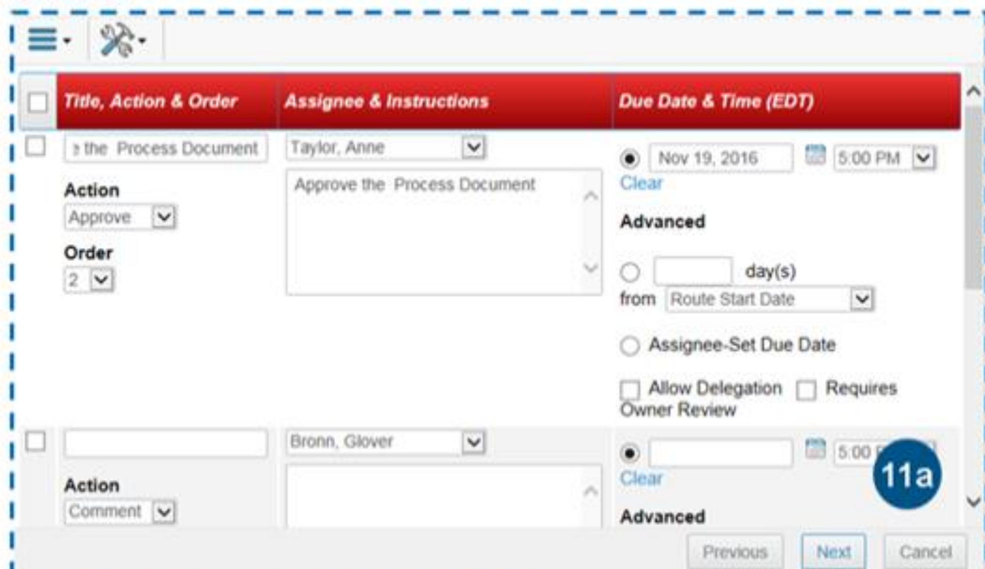


Create a Route (6/8)

10. Edit the accesses as shown, and click **Next**.

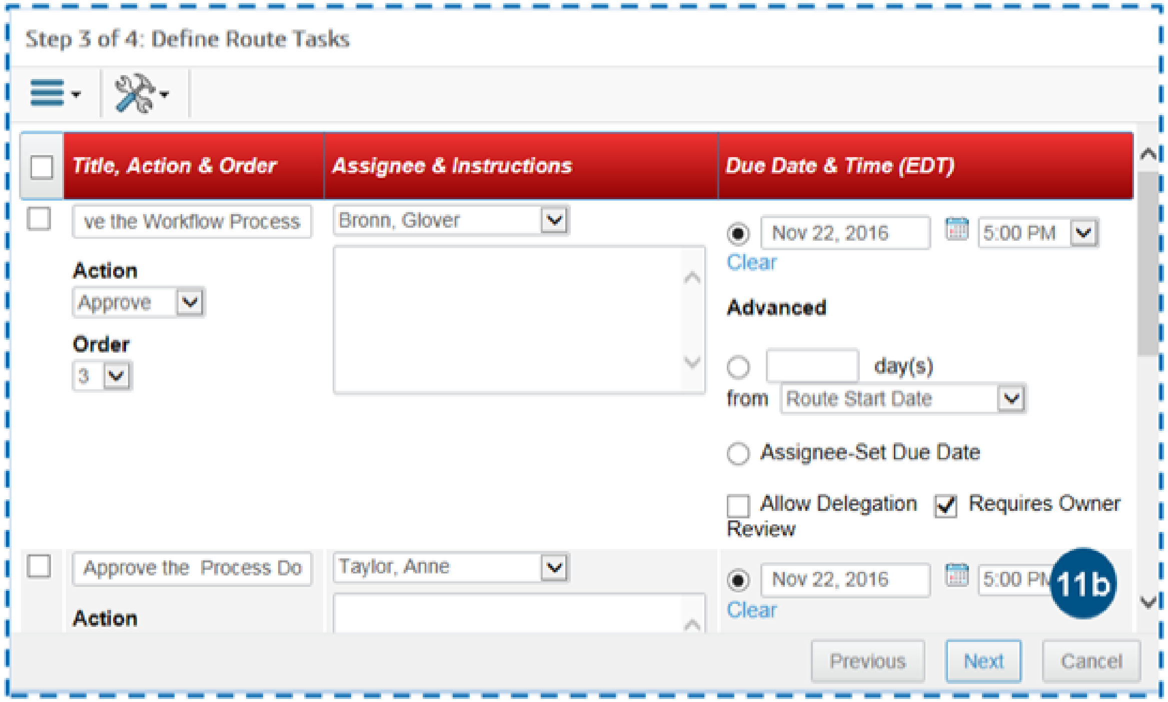


11. Define the following route tasks:
    a. Specify the following details for **Anne**:
        i. **Title** and **Instruction**: [Approve the Process Document]
        ii. **Action**: **Approve**
        iii. **Order**: **2**
        iv. **Due Date and Time**: (Specify a date that comes two days after today's date)
        v. Select the **Allow Delegation** check box
        vi. Keep all other default values



Create a Route (7/8)

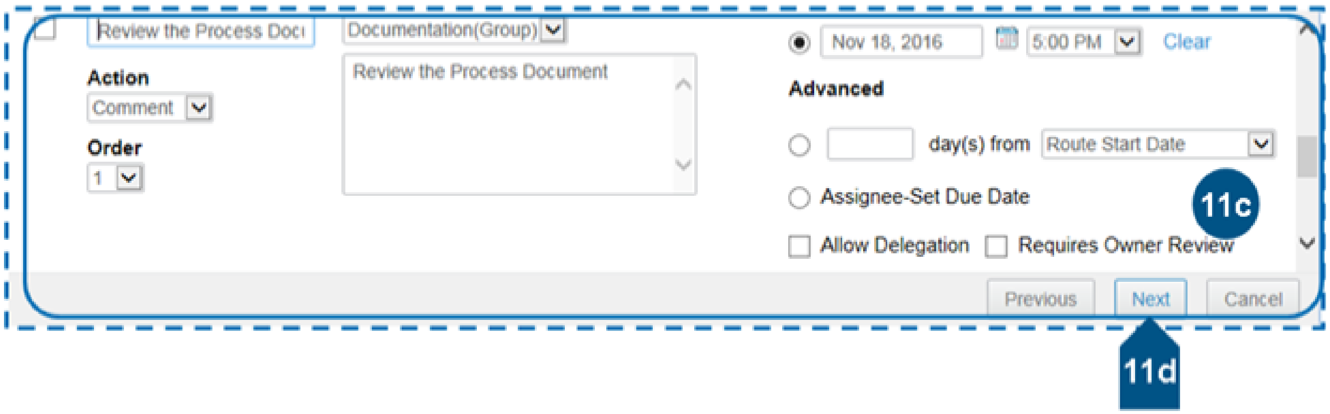
b. Specify the following details for **Bronn**:
   i. **Title** and **Instruction**: [Approve the Workflow Process]
   ii. **Action**: **Approve**
   iii. **Order**: **3**
   iv. **Due Date and Time**: (Specify a date that comes two days after today's date)
   v. Select the **Requires Owner Review** check box



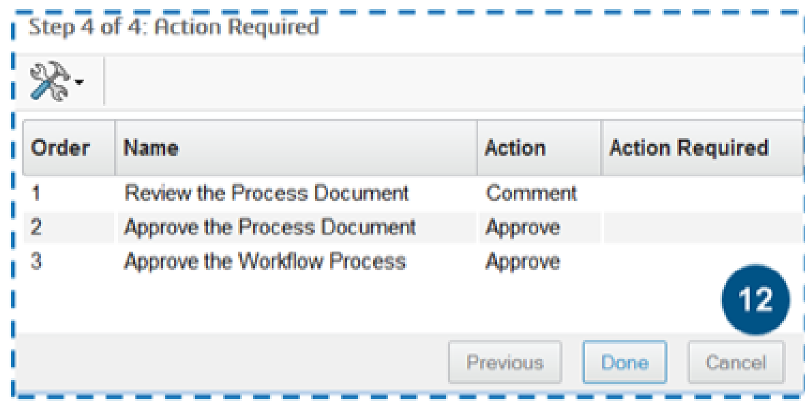
Create a Route (8/8)

c. Specify the following details for the **Documentation** group:
   i. **Title and Instruction**: [Review the Process Document]
   ii. **Action**: **Comment**
   iii. **Due Date and Time**: (Specify the date that comes one day after today's date)
   iv. **Order**: **1**
   v. Keep all other default values

d. Click **Next**.

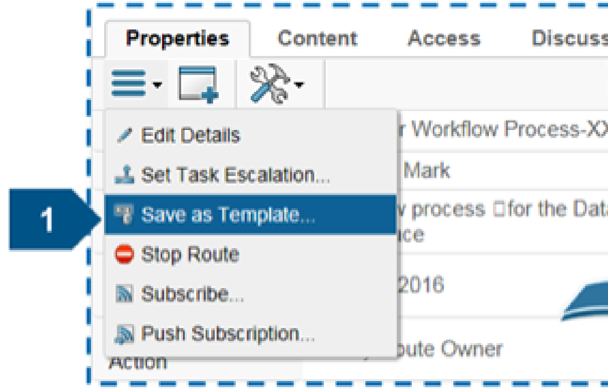


12. Review the required actions, and click **Done**.



Save the Route as a Template (1/2)

1. In the page toolbar, select **Actions > Save as Template...**.



2. Specify the following details and click **Done**:

   a. **Template Name**: [Standard Template-XXX]

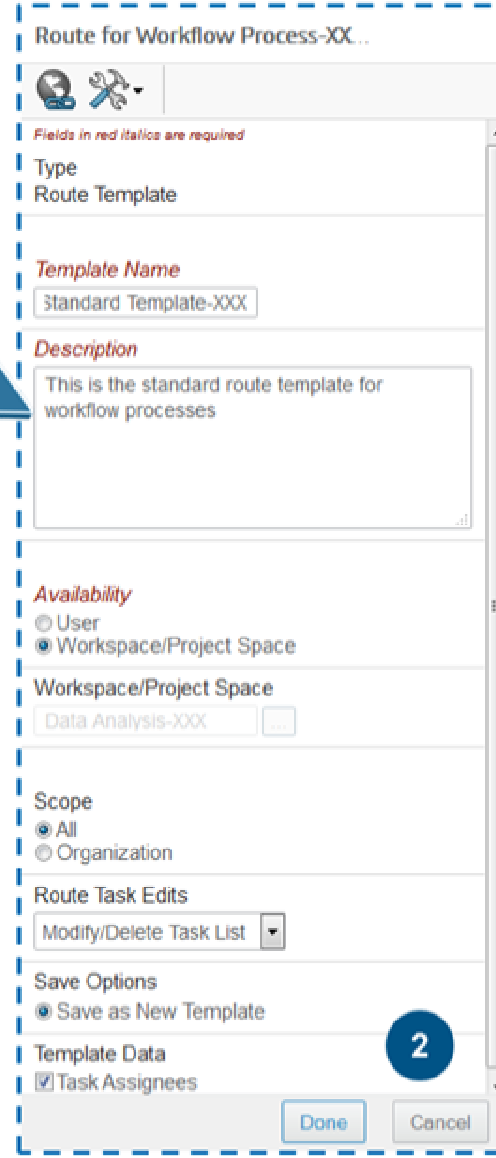
   b. **Description**: [This is the standard route template for workflow processes]

   c. **Availability**: **Workspace/Project Space**

   d. **Workspace/Project Space**: **Data Analysis-XXX**

   e. **Scope**: **All**

   f. **Route Task Edits**: **Modify/Delete Task List**

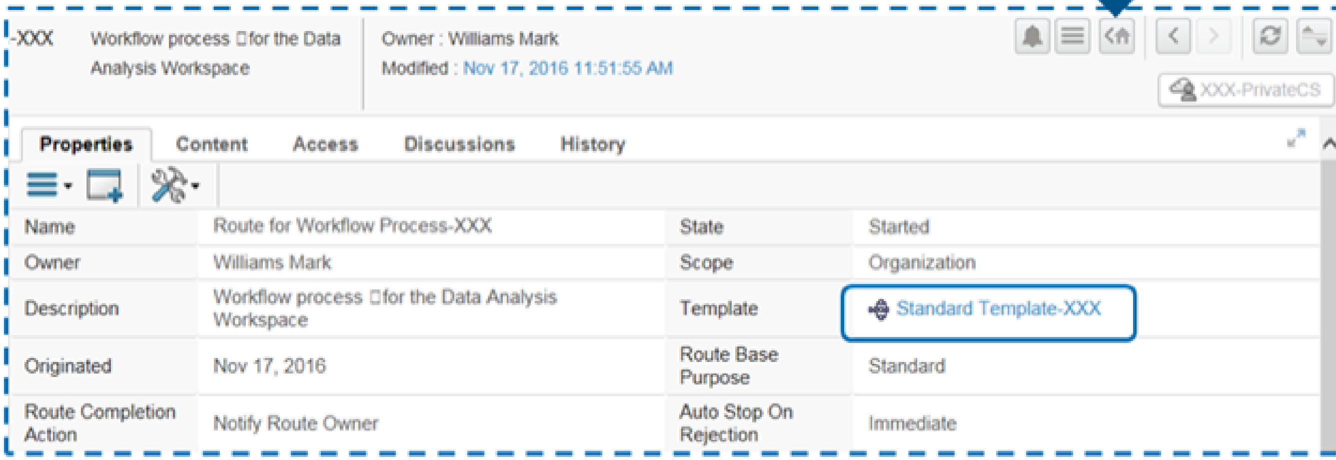


Save the Route as a Template (2/2)

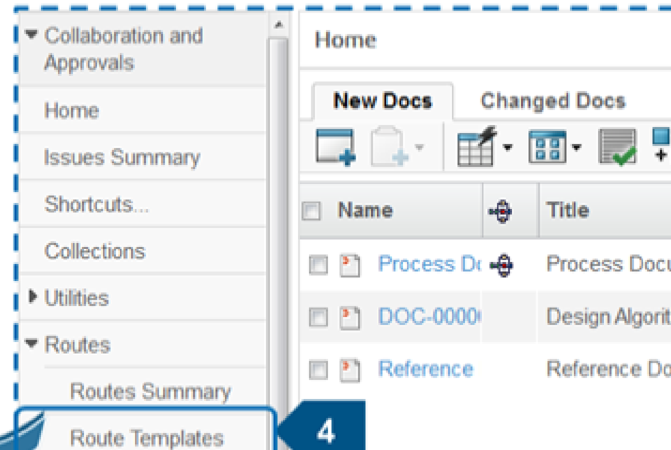
Observe that the existing route automatically gets associated to the new template.

3. In the page header, click the **ENOVIA Collaboration and Approvals Home** icon.

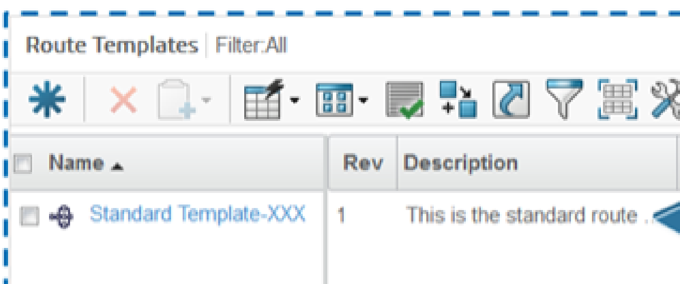
3



4. In the **My Desk** menu, select **Collaboration and Approvals > Routes > Route Template** to view the existing templates.

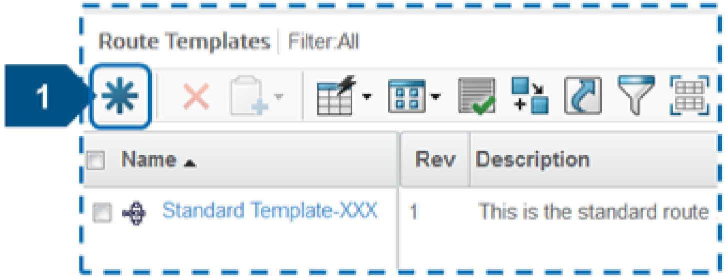


4



Create a New Route Template (1/4)

1. In the **Route Templates** page, click **Create New**.



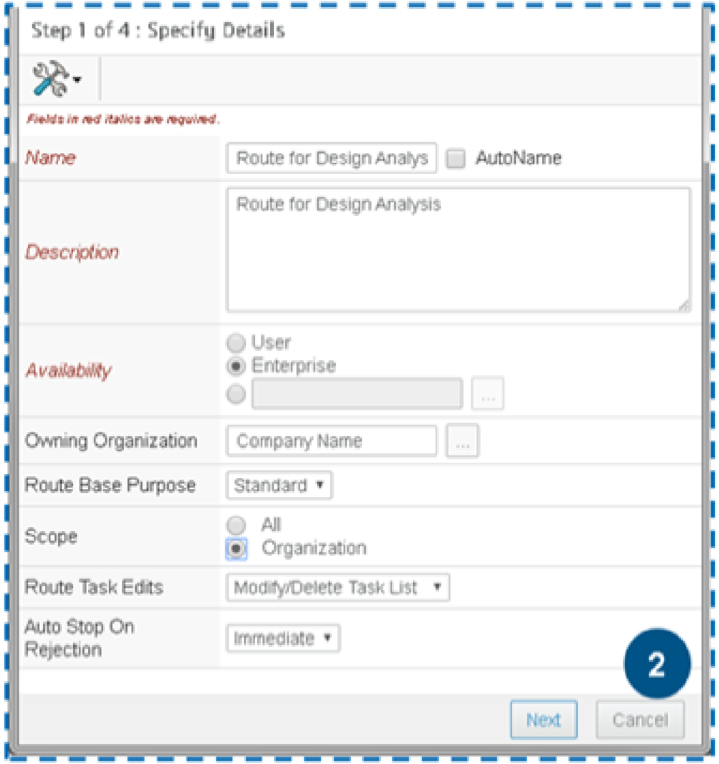
2. Specify the following details, and click **Next**:

   a. **Name**: [Route for Design Analysis-XXX]

   b. **Description**: [Route for Design Analysis]

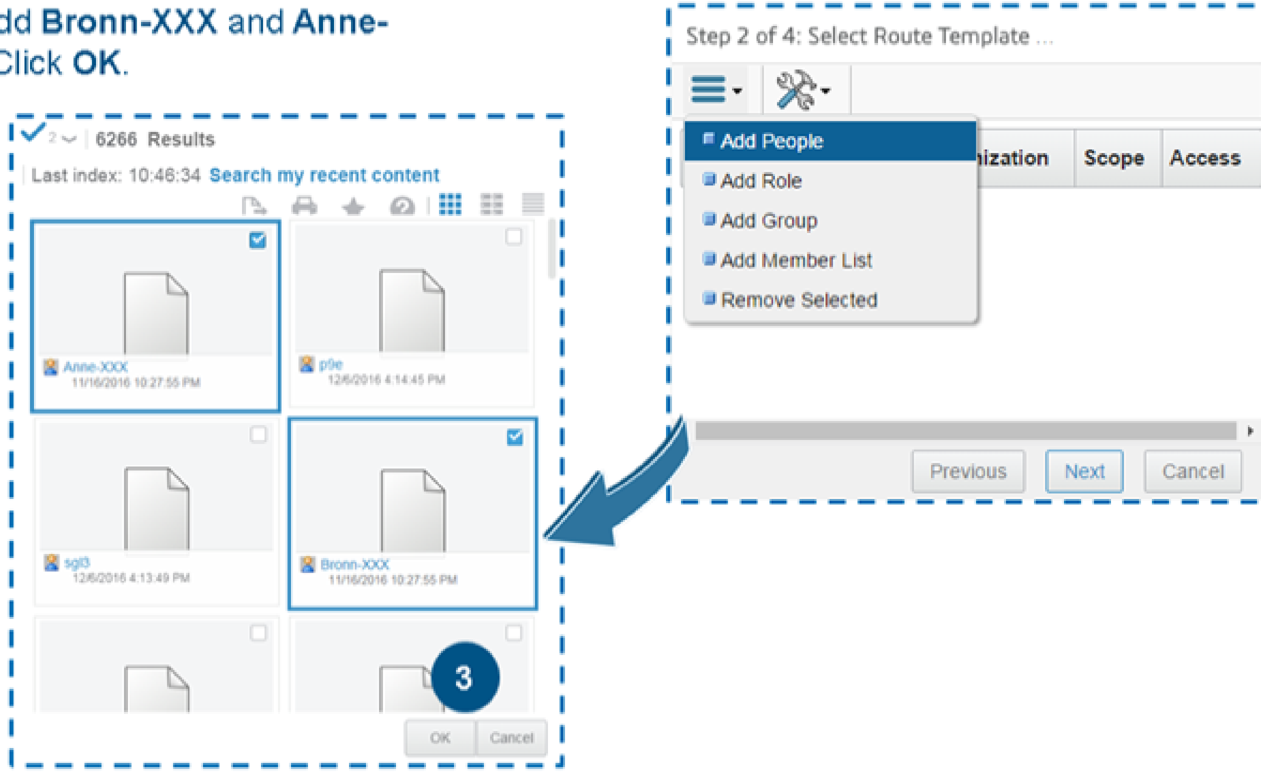
   c. **Availability**: **Enterprise**

   d. **Scope**: **Organization**

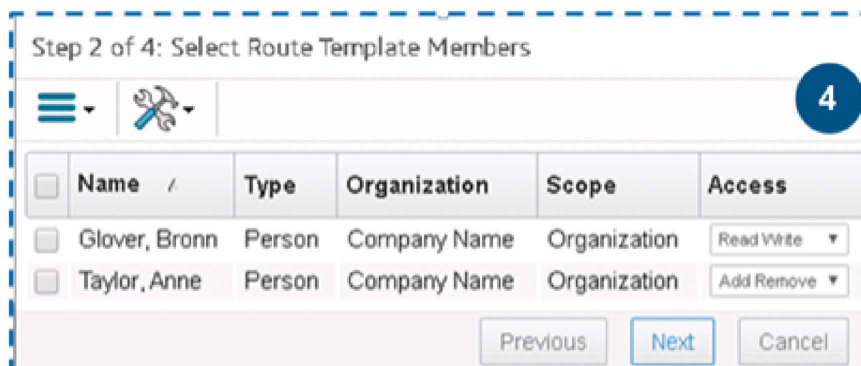


Create a New Route Template (2/4)

3. Click **Add People**, and add **Bronn-XXX** and **Anne-XXX** as route members. Click **OK**.

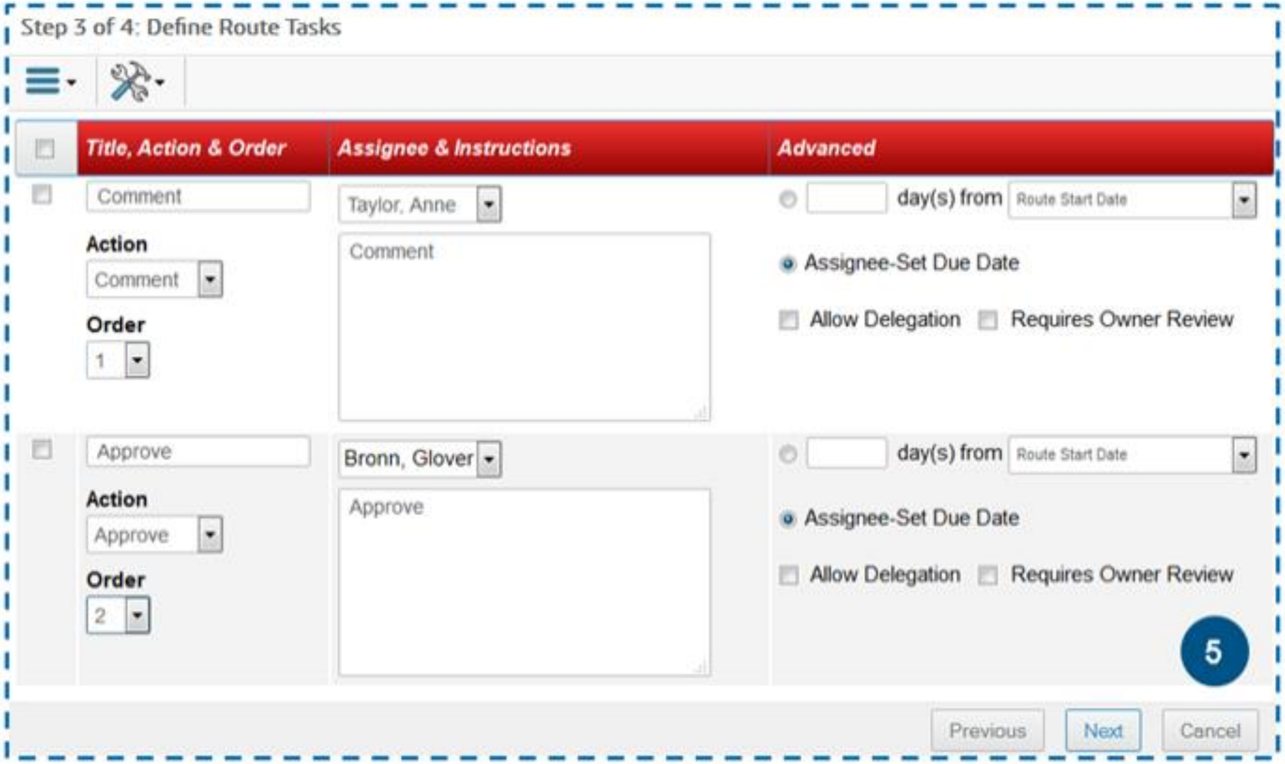


4. Edit the accesses as shown and click **Next**.



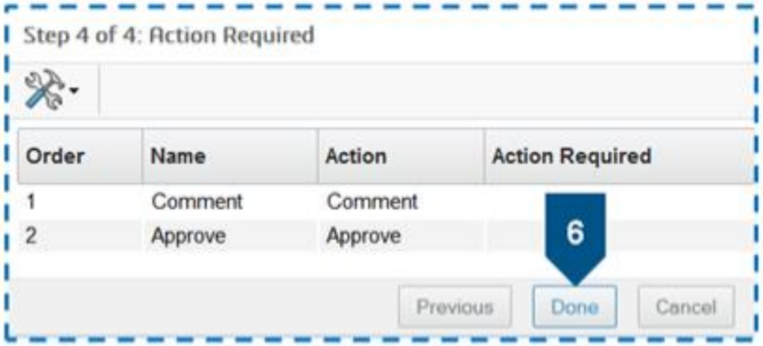
Create a New Route Template (3/4)

5. Define the actions, order, assignees and instructions as shown, and click **Next**.

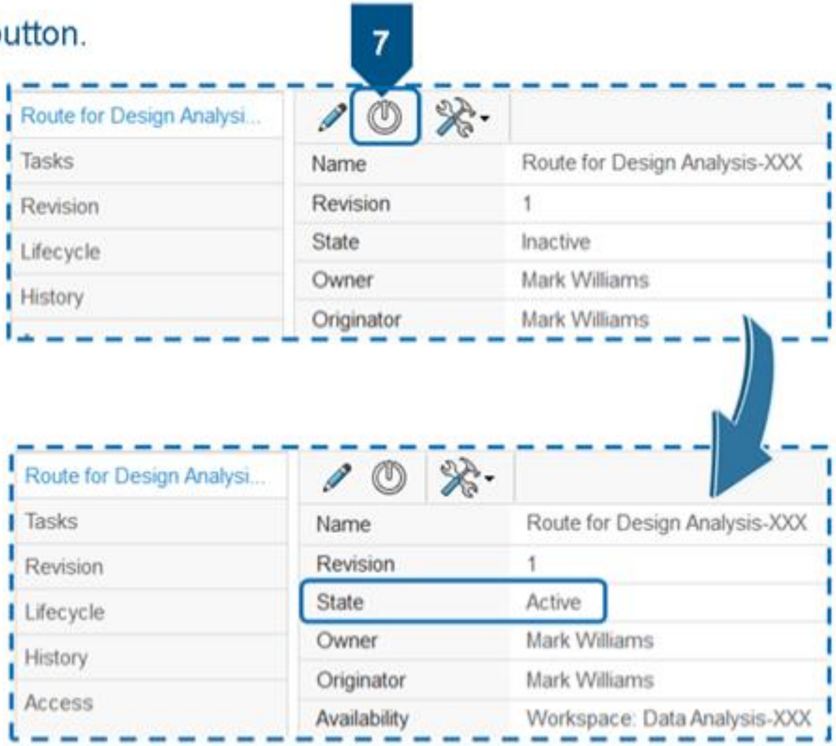


Create a New Route Template (4/4)

6. Click **Done**.



7. In the template's page, click the **Activate/Deactivate** button.



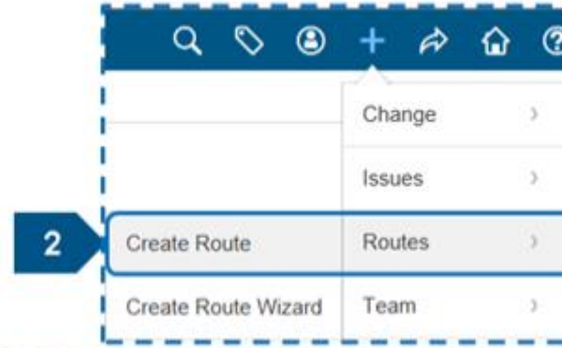
Observe that the template is now in the **Active** state.

8. Log out of **3D**EXPERIENCE platform.

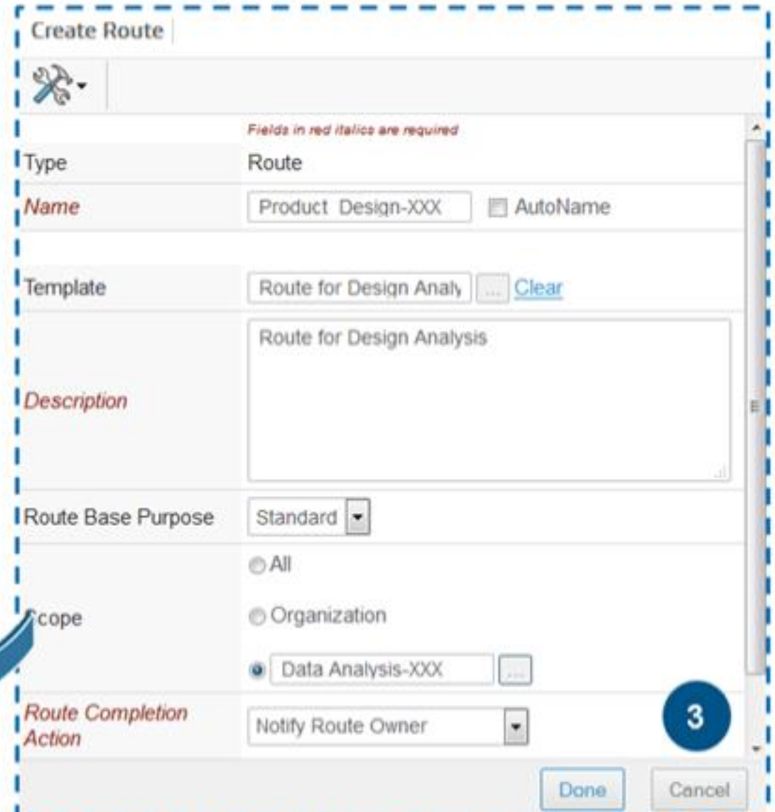
Create a Route using the Template (1/2)

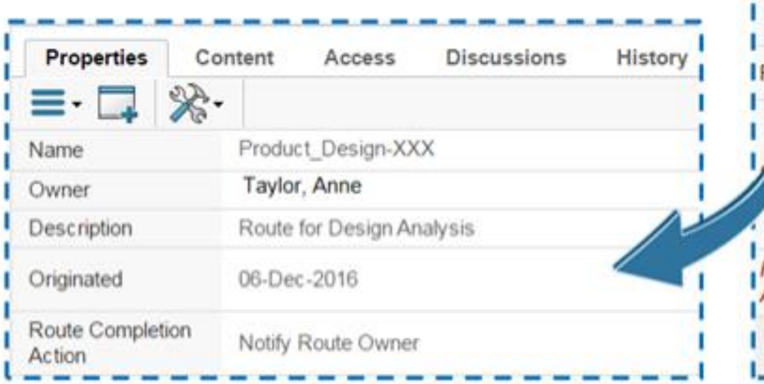
1. Log in to the **3D**EXPERIENCE platform with the following credentials:
   a. **Username or email**: [Anne-XXX]
   b. **Password**: [Anne-XXX]

2. In the top bar, select **Add > Routes > Create Route**.



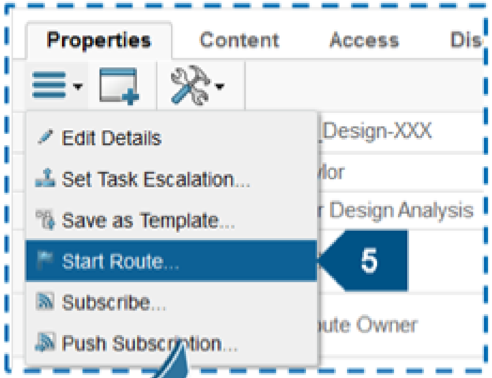
3. Specify the following details, and click **Done**:
   a. **Name**: [Product_Design-XXX]
   b. **Template**: **Route for Design Analysis**
   c. **Description**: Route for design Analysis
   d. **Scope**: Select the **Data Analysis-XXX** workspace



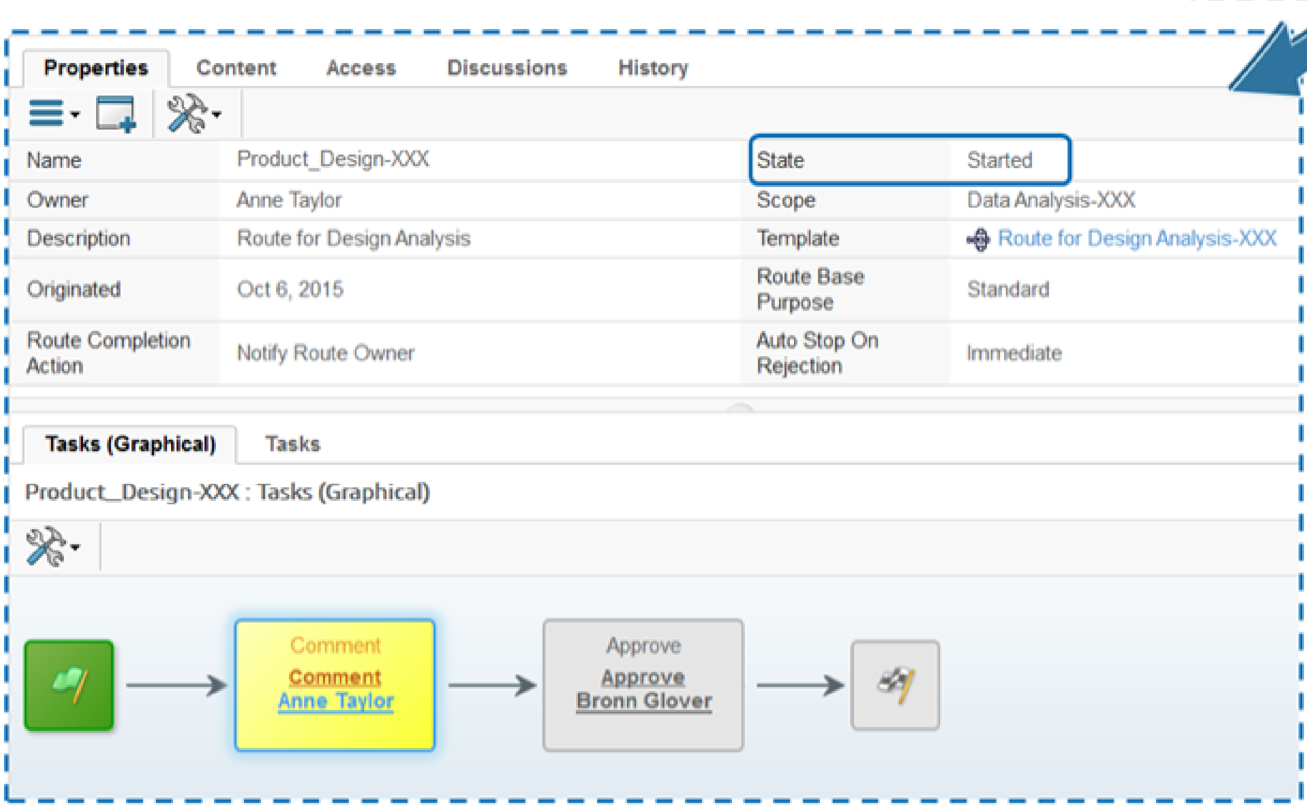


Create a Route using the Template (2/2)

5. In the page toolbar, select **Actions > Start Route…**, and refresh the page.



Observe that the route has started.



Recap: Create a Workflow using Routes

In this exercise, you have:

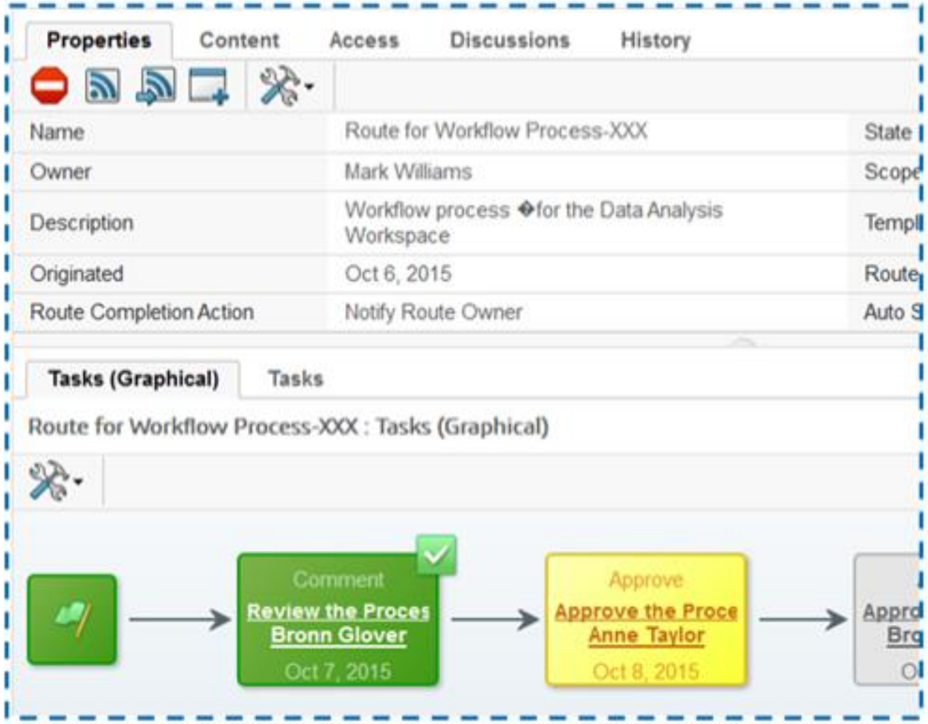
- ✓ Created routes
- ✓ Saved a route as a template
- ✓ Created a new route template

Exercise: Complete the Assigned Tasks

You will log in as a member of the Documentation group to accept the assigned task. Since Bronn is a member of this group, you will first log in as Bronn. Then you will log in as Anne and Mark to complete your assigned tasks.

By the end of this exercise you will be able to:

1. Accept tasks
2. Approve the tasks
3. Abstain and reject tasks
4. Restart a route
5. Complete the tasks

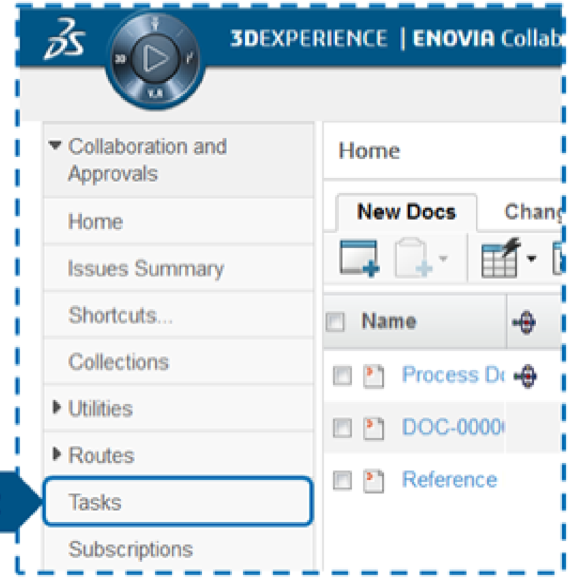


40 minutes

Exercise Progression

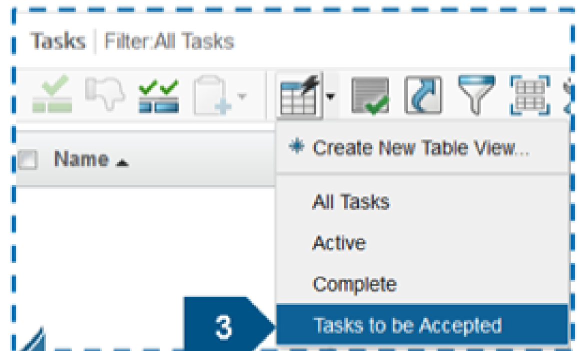
Accept the Task (1/2)

1. Log in to the **3D**EXPERIENCE platform with the following credentials:
   a. **Username or email**: [Bronn-XXX]
   b. **Password**: [Bronn-XXX]

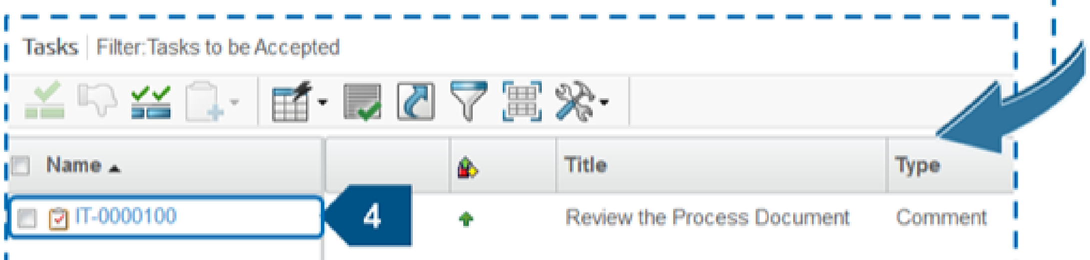


2. In the **My Desk** menu, select **Collaboration and Approvals > Tasks**.

3. In the page toolbar, select **View > Tasks to be Accepted**.

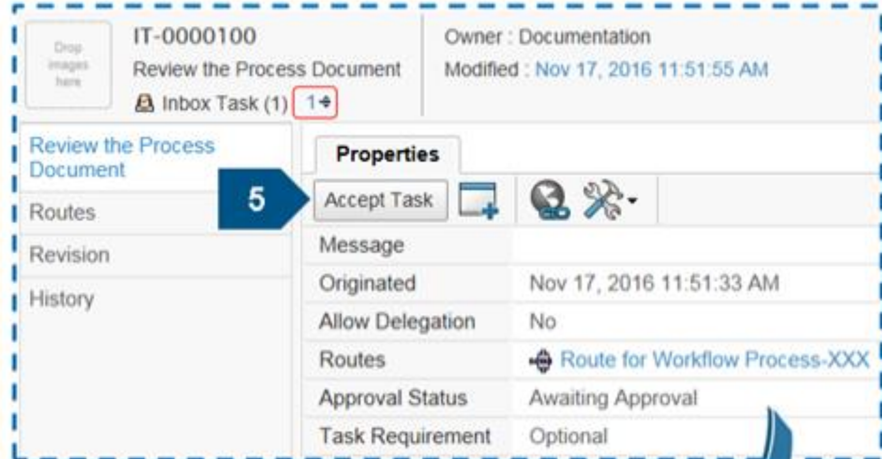


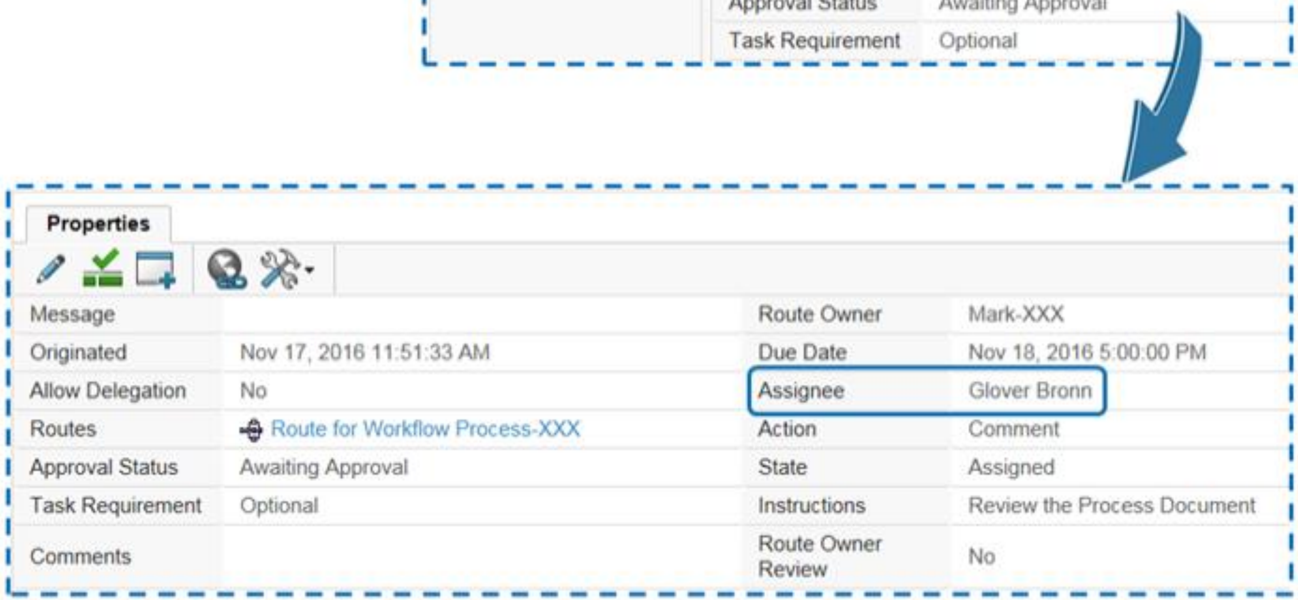
4. Click the task name.



Accept the Task (2/2)

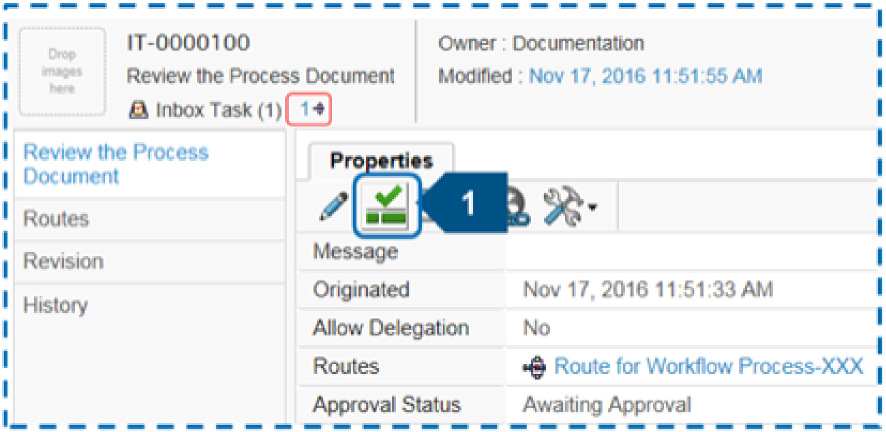
5. In the page toolbar, click **Accept Task**.



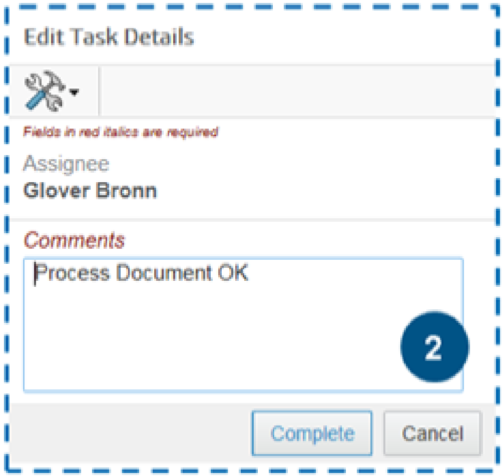


Complete the Task (1/2)

1. In the **Properties** tab (upper channel), click **Complete**.



2. Specify the **Comments** as [Process Document OK], and click **Complete**.

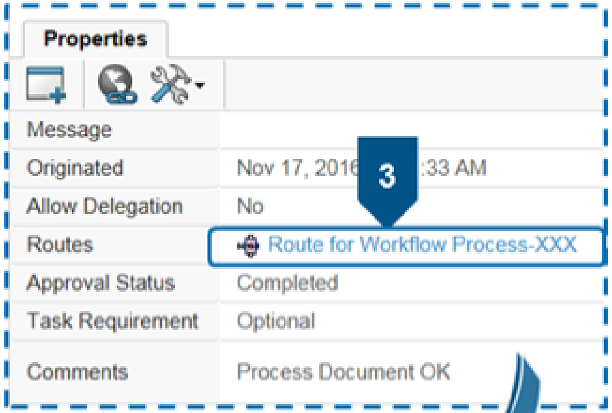


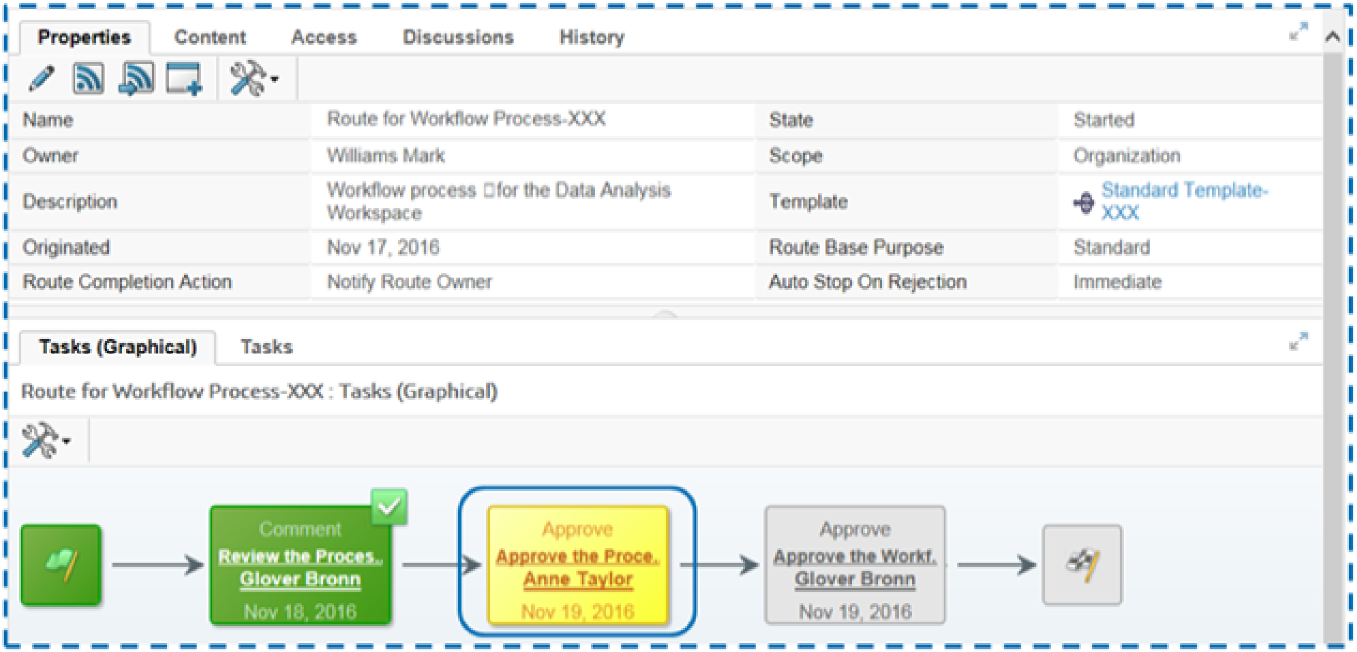
Complete the Task (2/2)

3. Click the route's name to view the next active task in the route.

   Observe that the next active task is assigned to Anne.

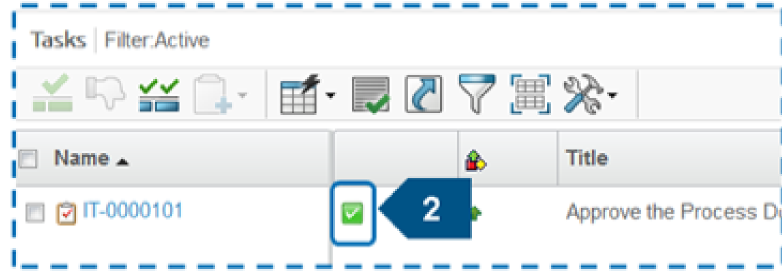
4. Log out of the **3D**EXPERIENCE platform.





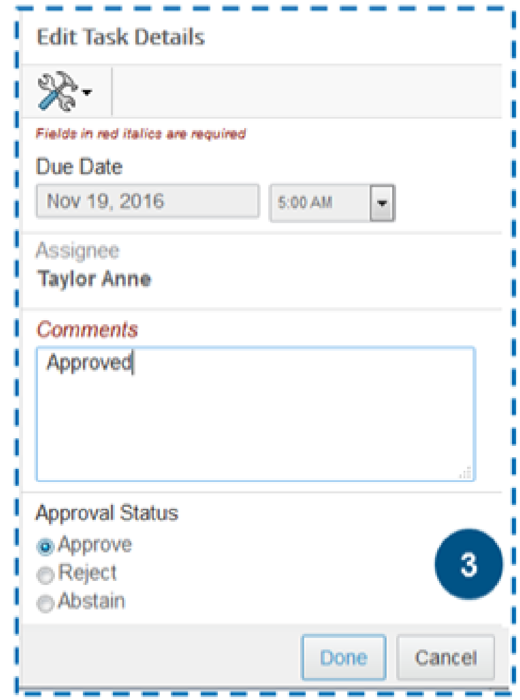
Approve the Tasks (1/2)

1. Log in to the **3D**EXPERIENCE platform with the following credentials:
    a. **Username or email**: [Anne-XXX]
    b. **Password**: [Anne-XXX]



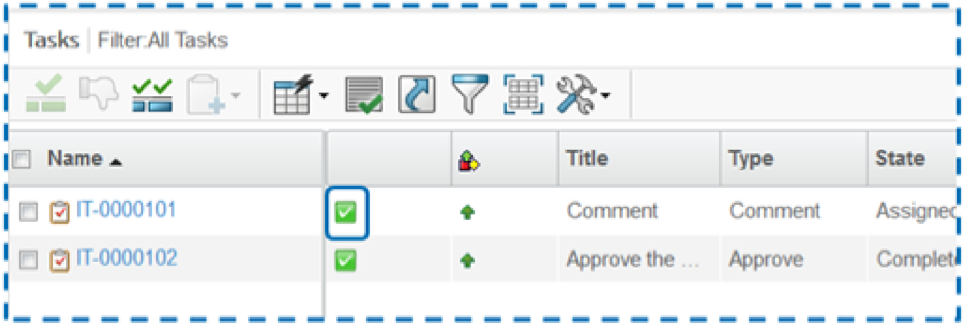
2. Navigate to the **Tasks** page, and click the **Edit Task Details** icon to approve and complete the next task in the route.

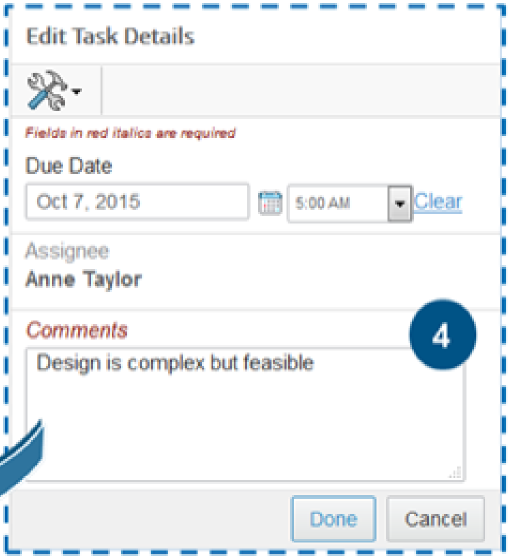
3. Specify the **Comments** as [Approved], and click **Done**.

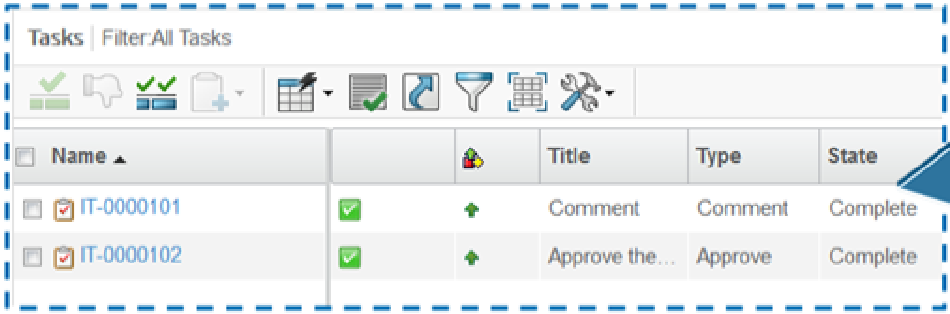


Approve the Tasks (2/2)

4. Similarly, approve the next assigned task.



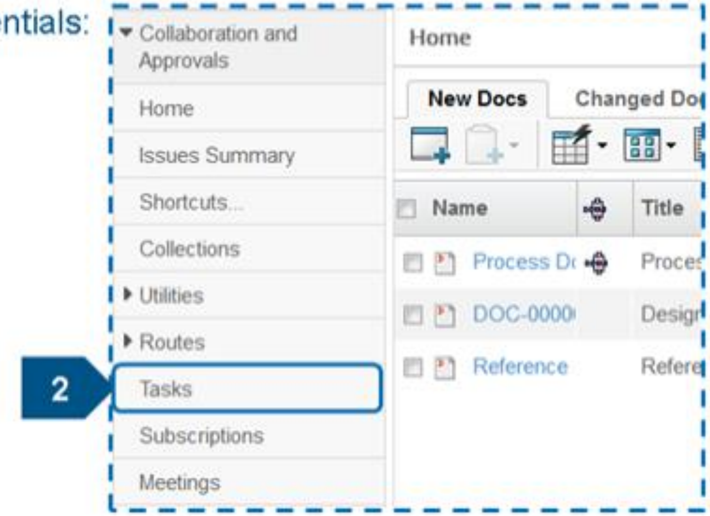




5. Log out of the **3D**EXPERIENCE platform.

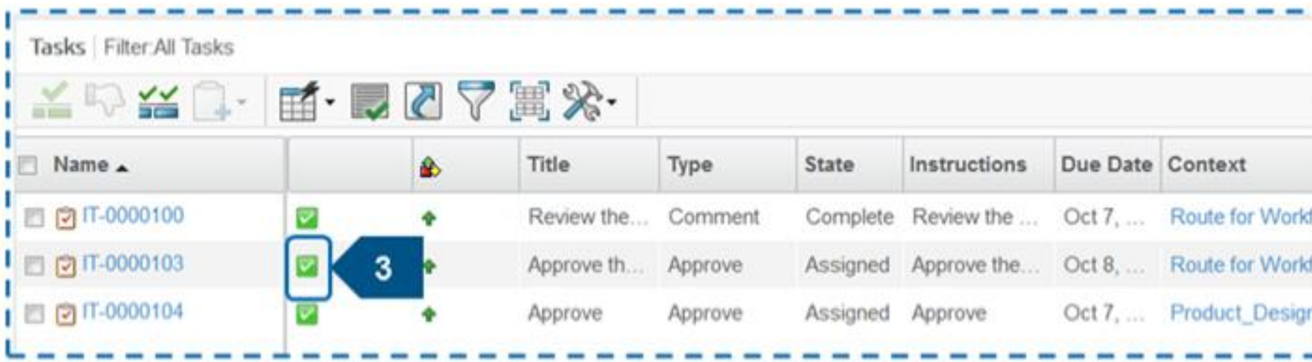
Abstain a Task (1/3)

1. Log in to the **3D**EXPERIENCE platform with the following credentials:
    a. **Username or email**: [Bronn-XXX]
    b. **Password**: [Bronn-XXX]



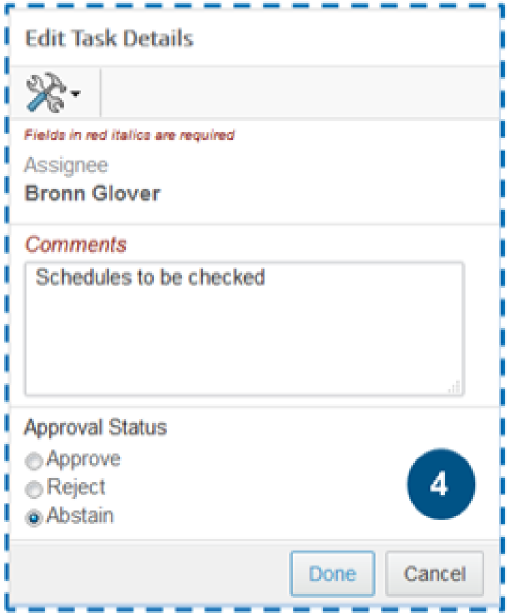
2. Navigate to the **Tasks** page.

3. Click **Edit the Task Details** for the task with the **Context** as **Route for Workflow Process-XXX**.



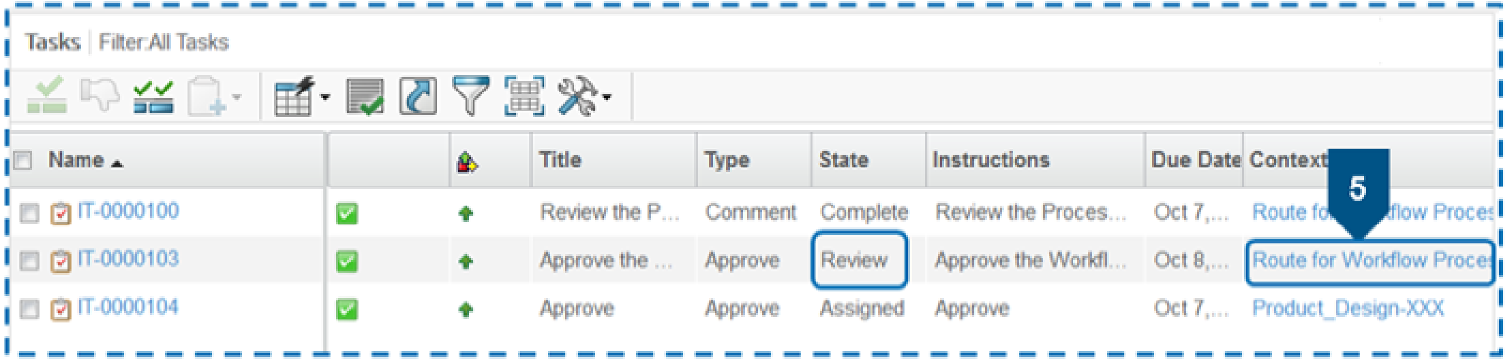
Abstain a Task (2/3)

4. Specify the **Comments** as [Schedules to be checked], and select **Abstain**.



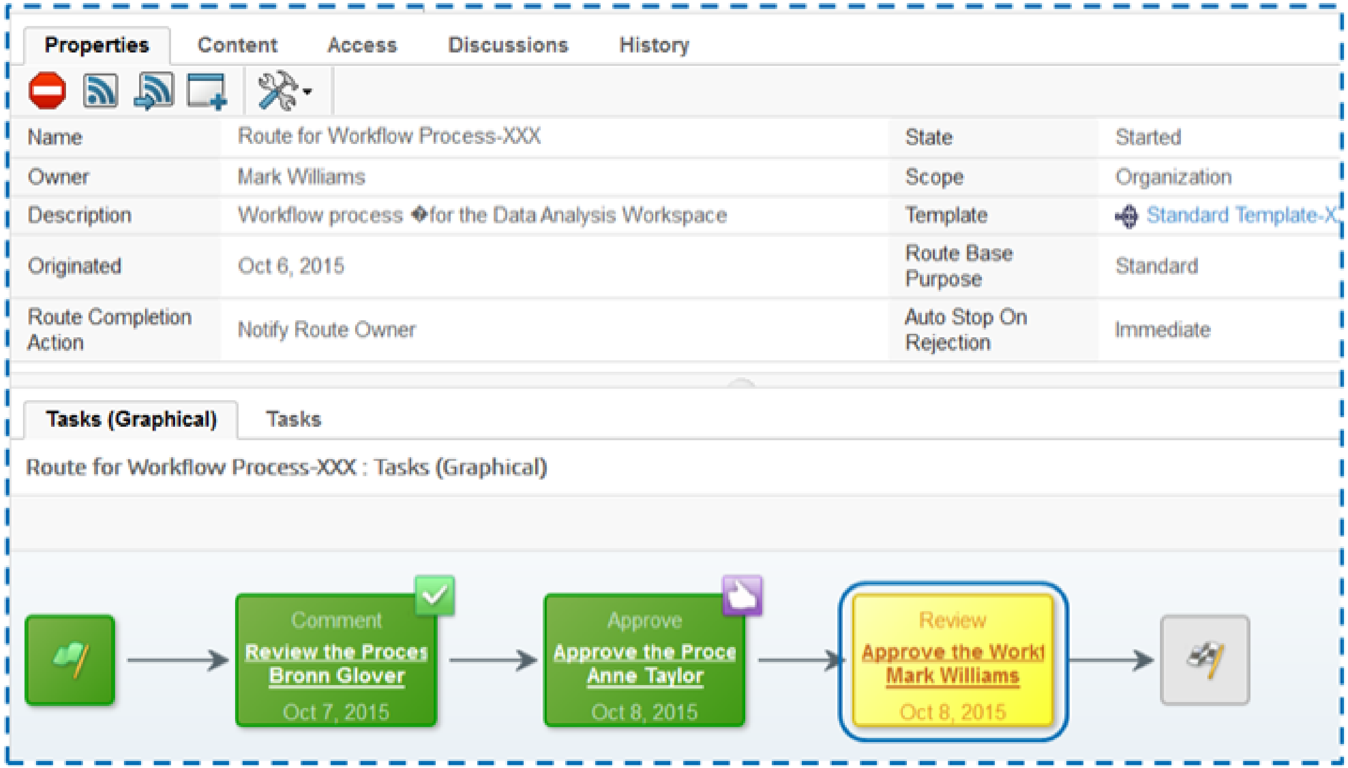
Observe that the task requires the route owner's review.

5. Click the route's name to see the next active task, and the assignee.



Abstain a Task (3/3)

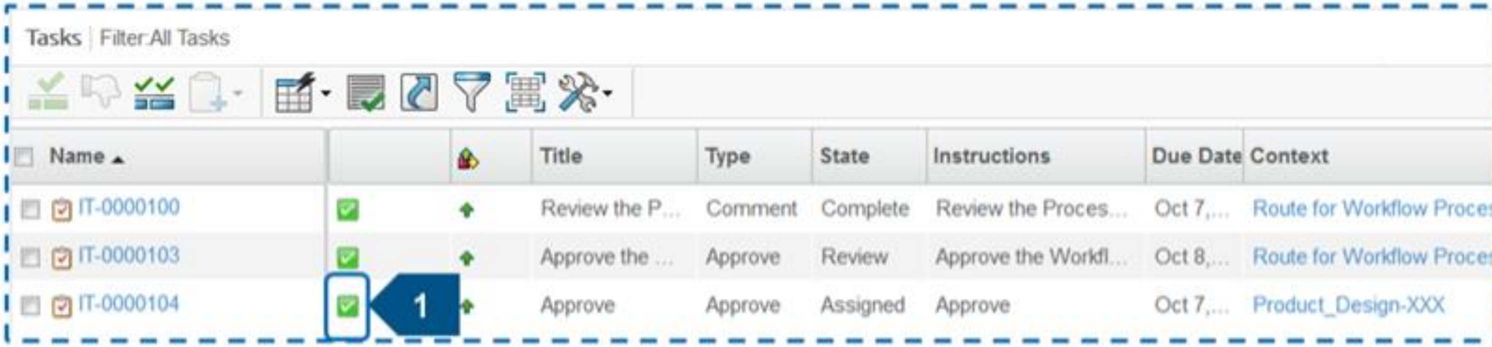
Now, Mark is the next person to work on the task, because this task requires owner's approval.



6. Close the window, and navigate to the **Tasks** page.

Reject a Task (1/2)

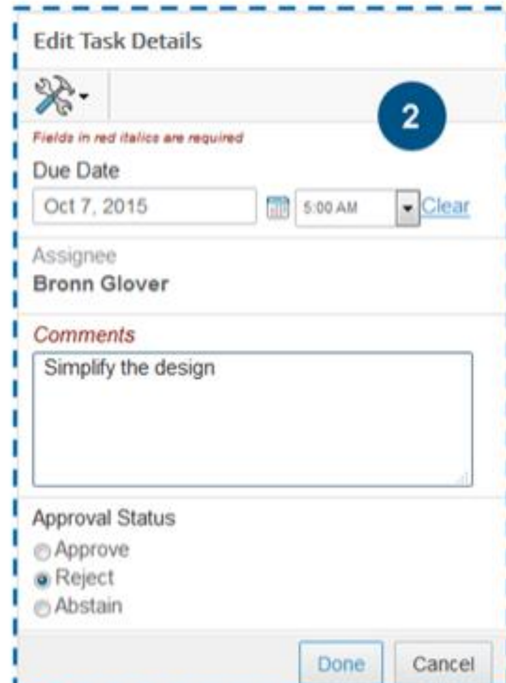
1. Click the task with the **Context** as **Product_Design-XXX**.



2. Select the following details, and click **Done**:

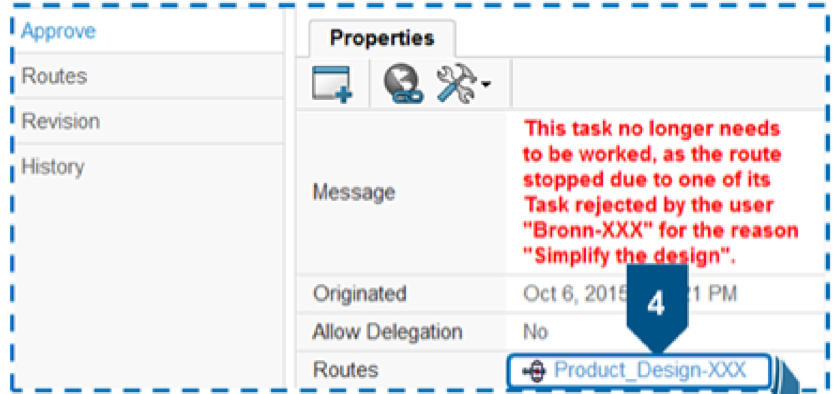
    a. **Comments**: [Simplify the design]

    b. **Approval Status**: **Reject**



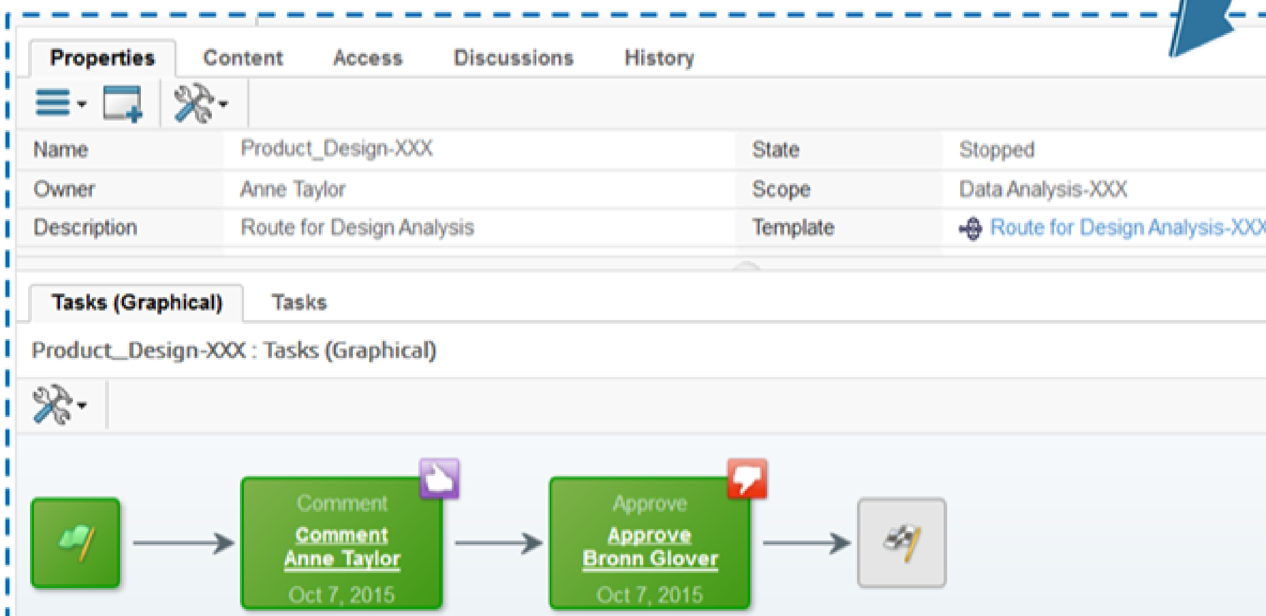
Reject a Task (2/2)

3. Navigate to the task's **Properties** page; and observe the message for the rejected task.



4. Click the route's name to view the details.

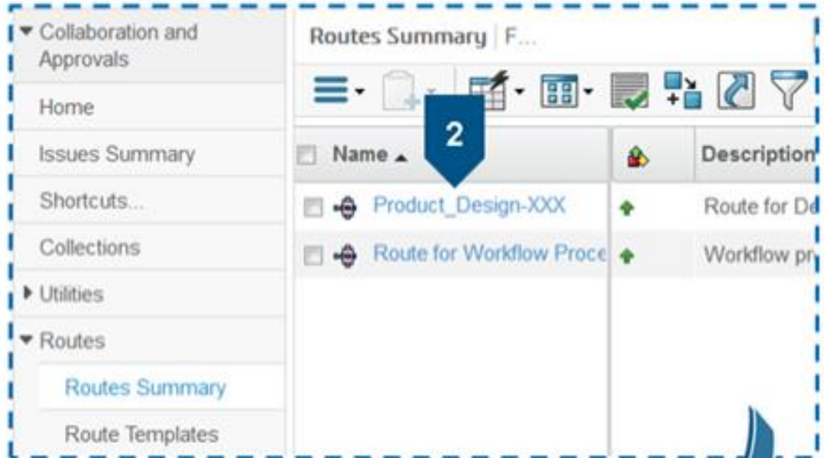
5. Log out of the **3D**EXPERIENCE platform.



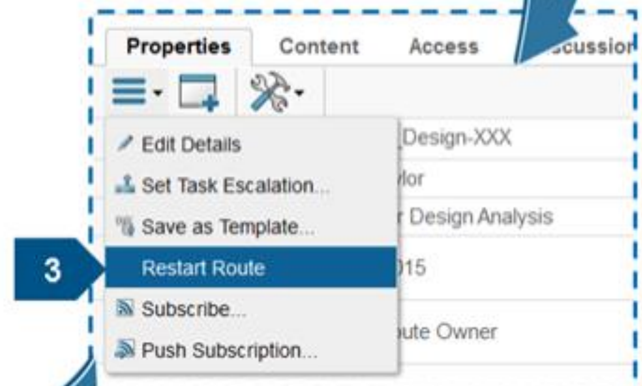
Restart the Route

1. Log in to the **3D**EXPERIENCE platform with the following credentials:
   a. **Username or email**: [Anne-XXX]
   b. **Password**: [Anne-XXX]

2. Navigate to the **Route Summary** page and select the **Product_Design-XXX** route.



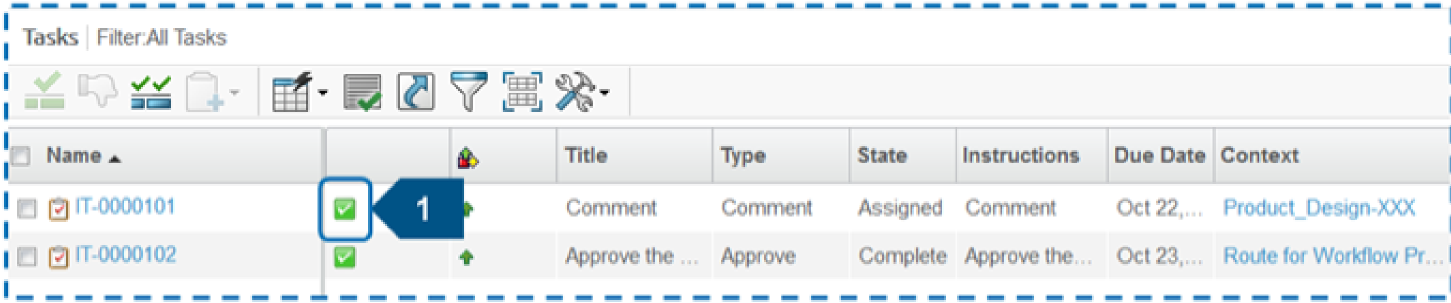
3. Select **Actions > Restart Route**.



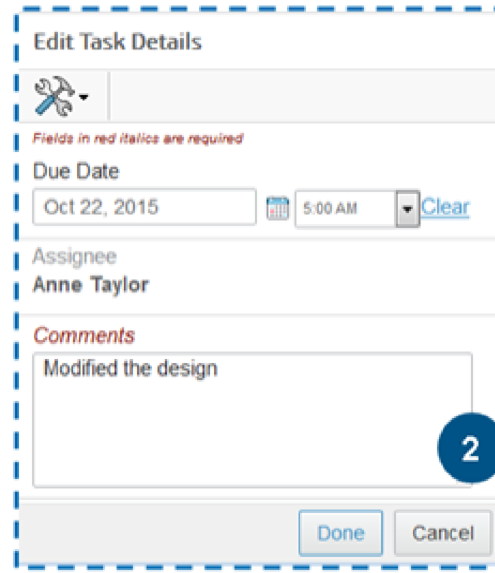
Observe that now the route has started, and the first task awaits Anne's approval comments.

Complete the Route (1/7)

1. Navigate to the **Tasks** page and click the **Edit Task Details** for the newly assigned task.



2. Select the following details, and click **Done**:
   a. **Comments**: [Modified the design]

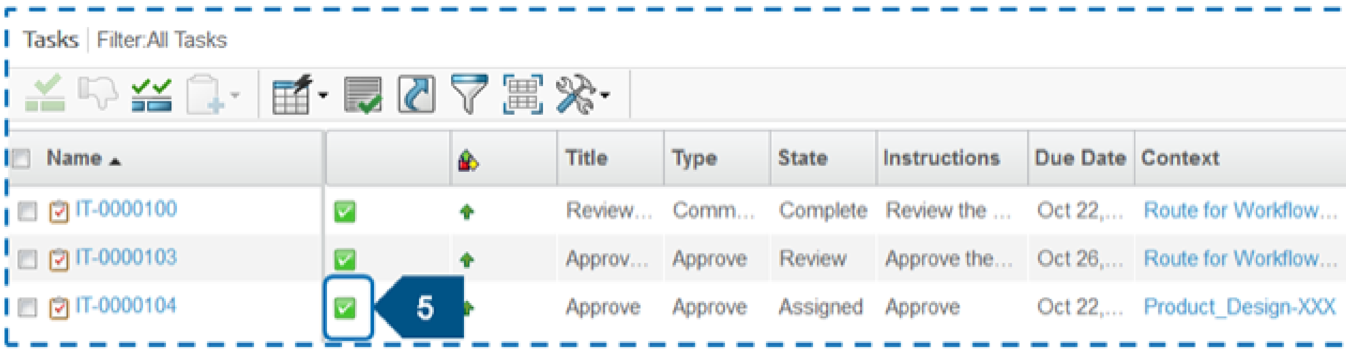


3. Log out of the **3D**EXPERIENCE platform.

Complete the Route (2/7)

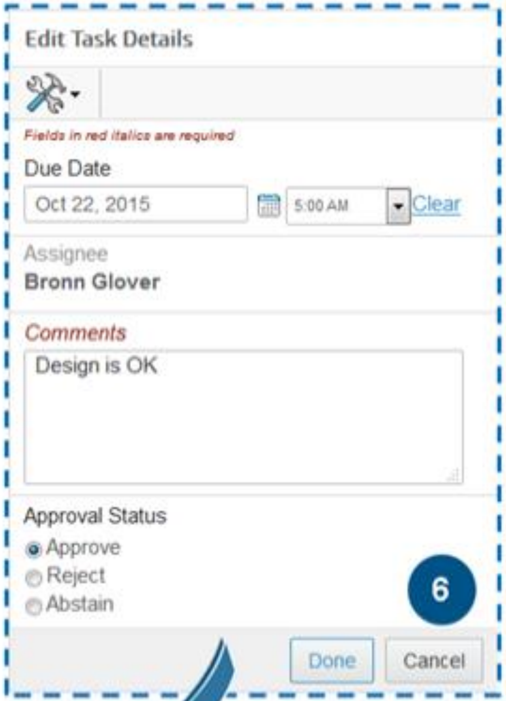
4. Log in to the **3D**EXPERIENCE platform with the following credentials:
    a. **Username or email**: [Bronn-XXX]
    b. **Password**: [Bronn-XXX]

5. Navigate to the **Tasks** page and click the **Edit Task Details** for the newly assigned task.

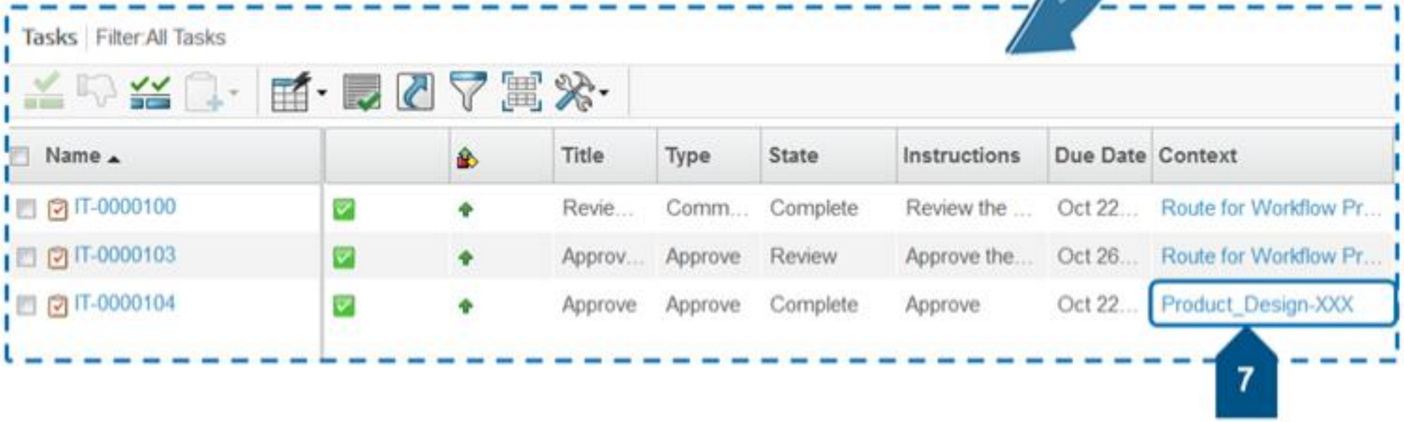


Complete the Route (3/7)

6. Specify the **Comments** as [Design is OK], and click **Done**.

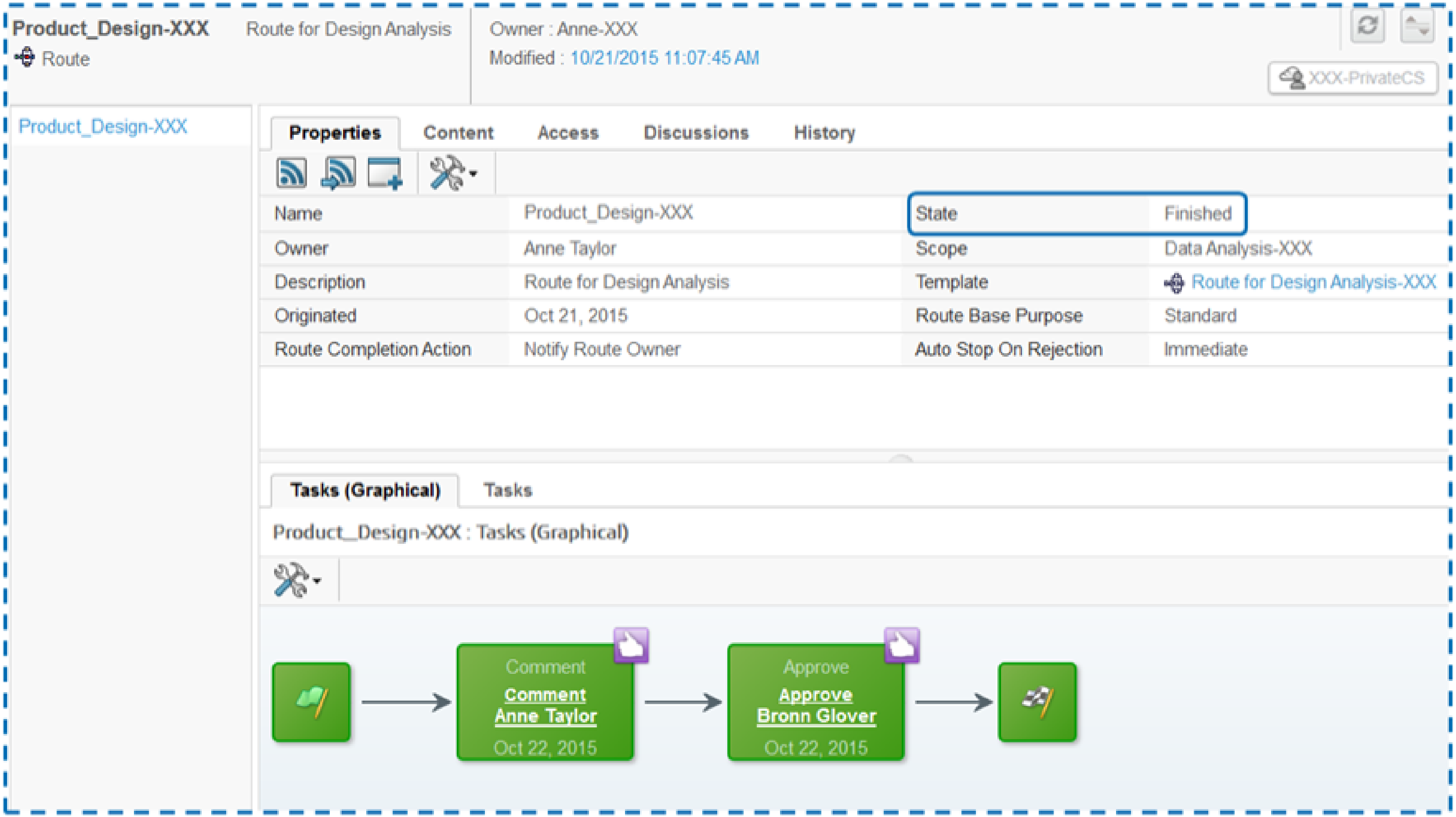


7. Click **Product_Design-XXX**.



Complete the Route (4/7)

Observe that the status is **Finished**; hence, the route is complete now.

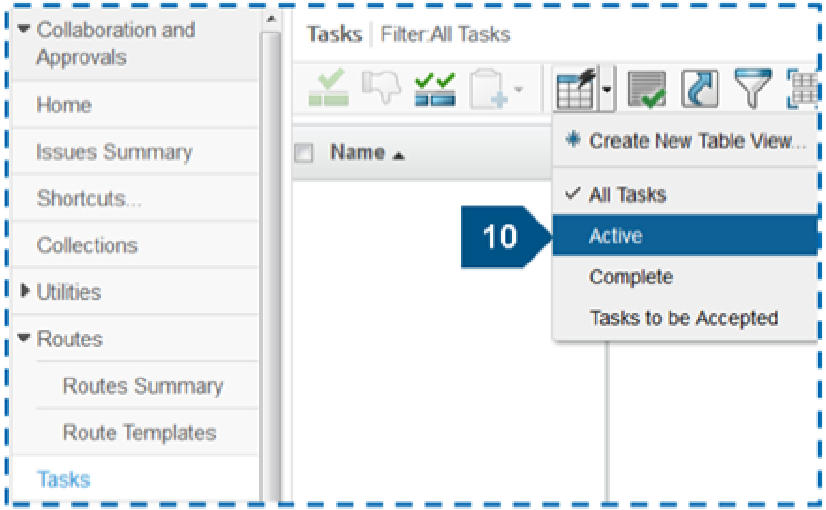


8. Log out of the **3D**EXPERIENCE platform.

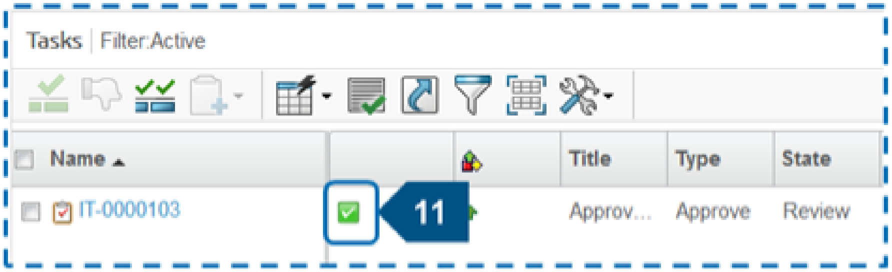
Complete the Route (5/7)

9. Log in to the **3D**EXPERIENCE platform with the following credentials:
    a. **Username or email**: [Mark-XXX]
    b. **Password**: [Mark-XXX]

10. Navigate to the **Tasks** page and select **View > Active**.

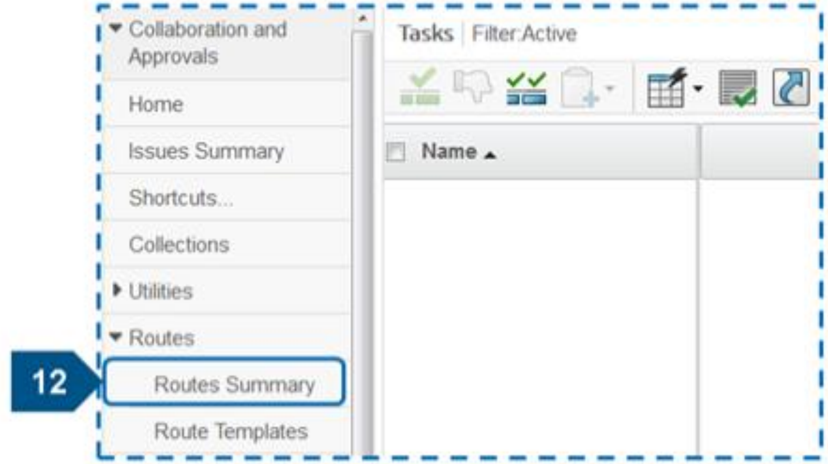


11. Click the **Edit Task Details** icon.

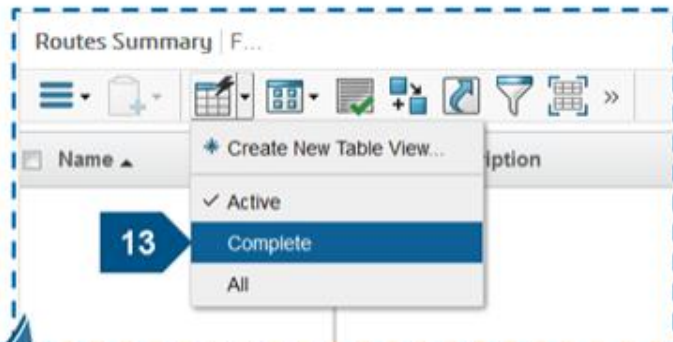


Complete the Route (6/7)

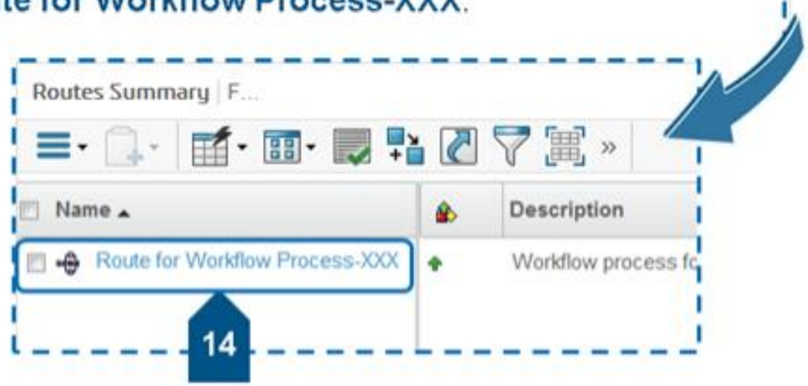
12. Navigate to the **Routes Summary** page.



13. In the page toolbar, select **View > Complete**.

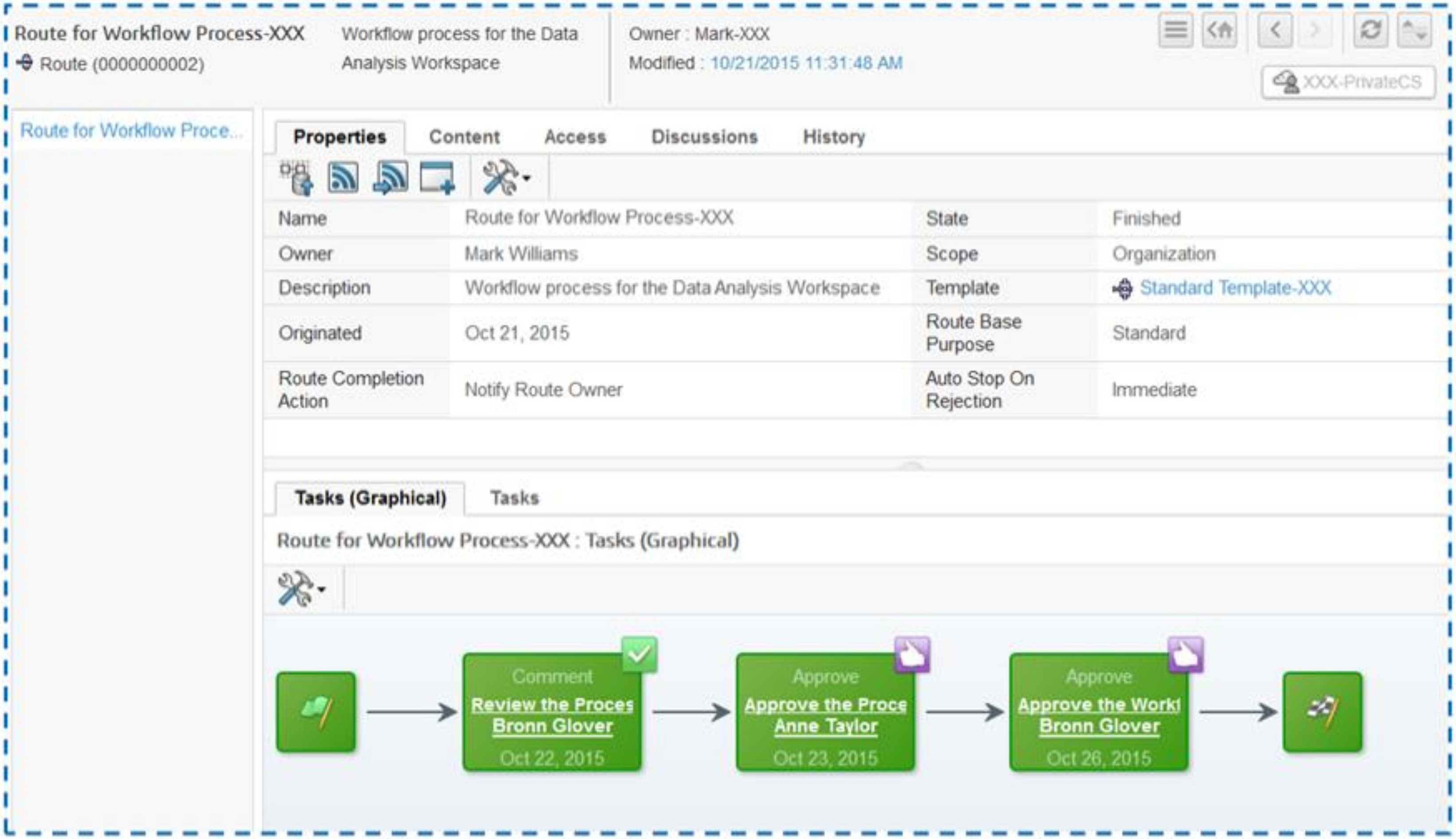


14. Click **Route for Workflow Process-XXX**.



Complete the Route (7/7)

Observe that the route is complete.



Recap: Complete the Assigned Tasks

In this exercise, you have:

- ✓ Accepted tasks
- ✓ Approved the tasks
- ✓ Abstained and rejected tasks
- ✓ Restarted a route
- ✓ Completed the tasks

Exercise: Subscribe to Object Events

You will log in as Mark and push the subscription to Anne. Then, you will log in as Anne, check your subscriptions, and then subscribe yourself to an object event.

By the end of this exercise you will be able to:

1. Push subscriptions to another person
2. Subscribe to object events
3. Check the subscriptions

Reference Document-XXX-125407157883 : Push Subscription

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

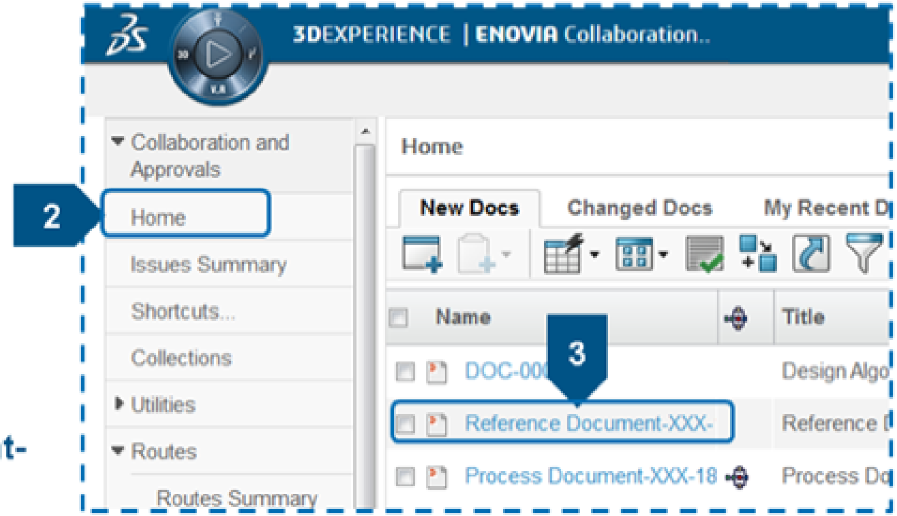
Close

20 minutes

Exercise Progression

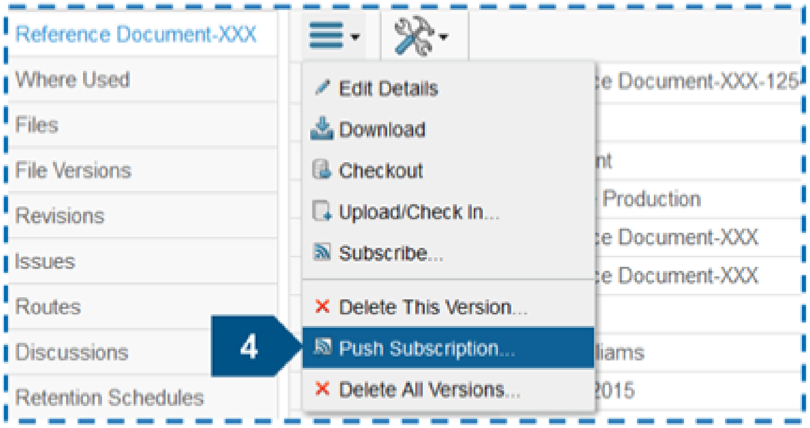
Push Subscriptions (1/4)

1. Log in to the **3D**EXPERIENCE platform with the following credentials:
    a. **Username** or **email**: [Mark-XXX]
    b. **Password**: [Mark-XXX]



2. In the **My Desk** menu, select **Collaboration and Approvals > Home**.

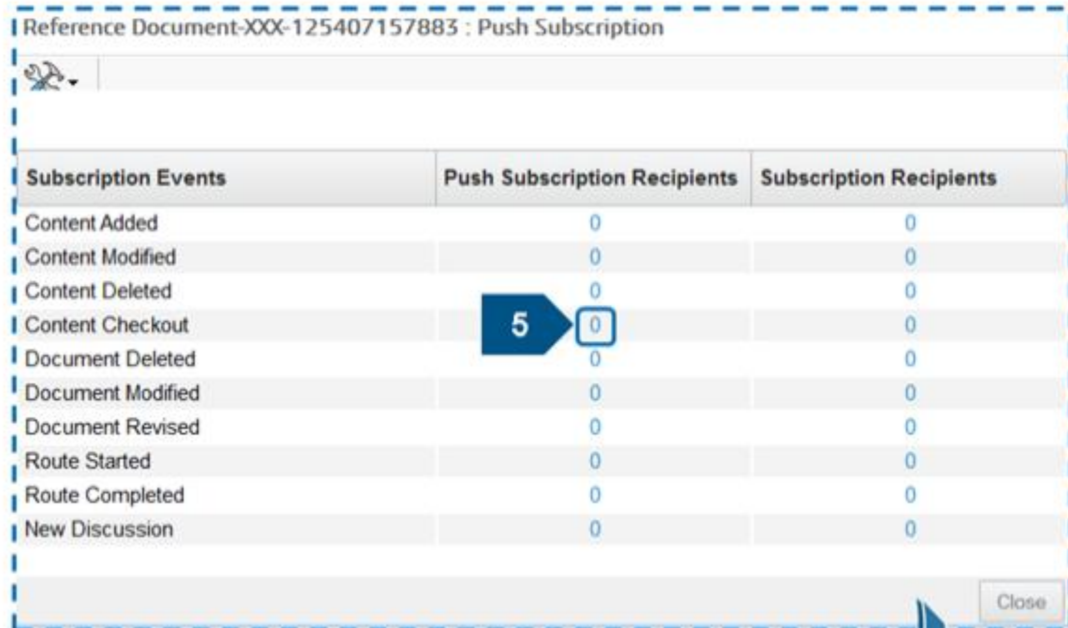
3. In the **New Docs** tab, select **Reference Document-XXX**.



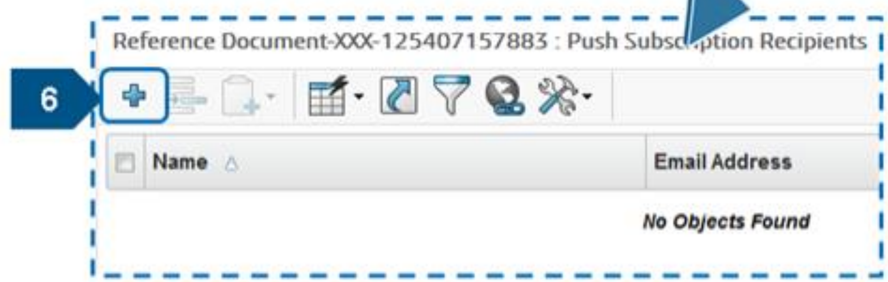
4. In the page toolbar, select **Actions > Push Subscription....**

Push Subscriptions (2/4)

5. Click the **Push Subscription Recipients** link for **Content Checkout**.

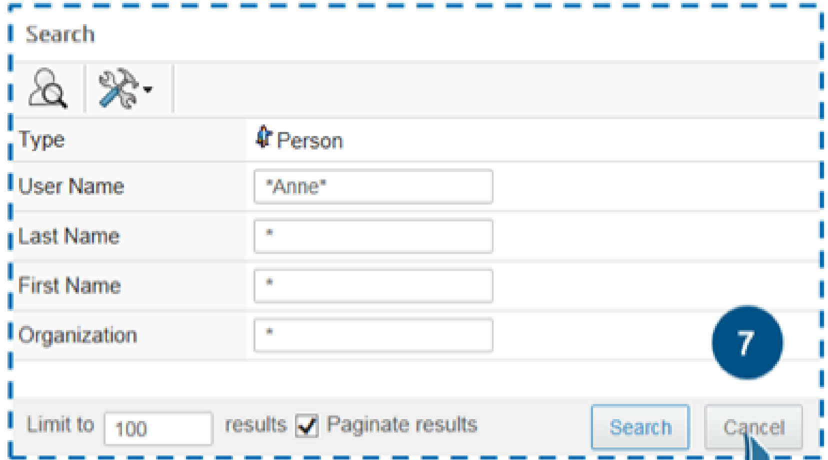


6. Click **Add Recipients** to add the members.

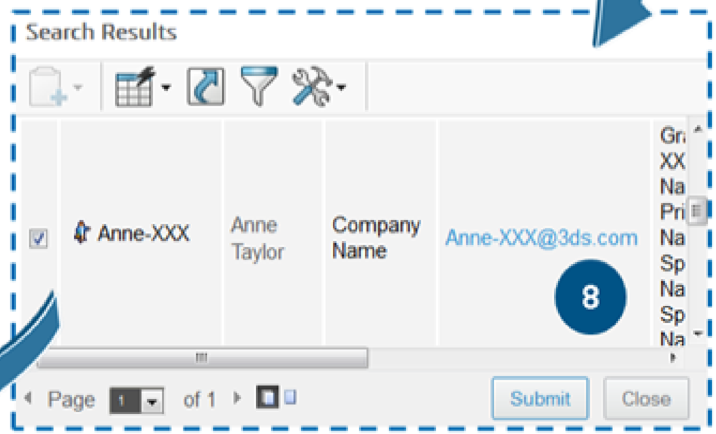


Push Subscriptions (3/4)

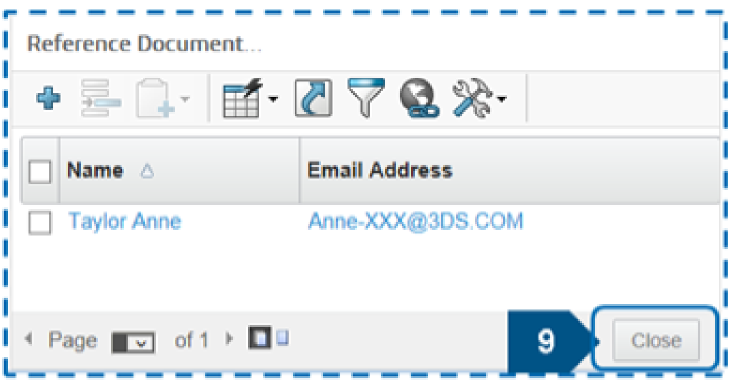
7. Specify the **User Name** as [*Anne*], and click **Search**.



8. Select **Anne-XXX** and click **Submit**.



9. Click **Close**.



Push Subscriptions (4/4)

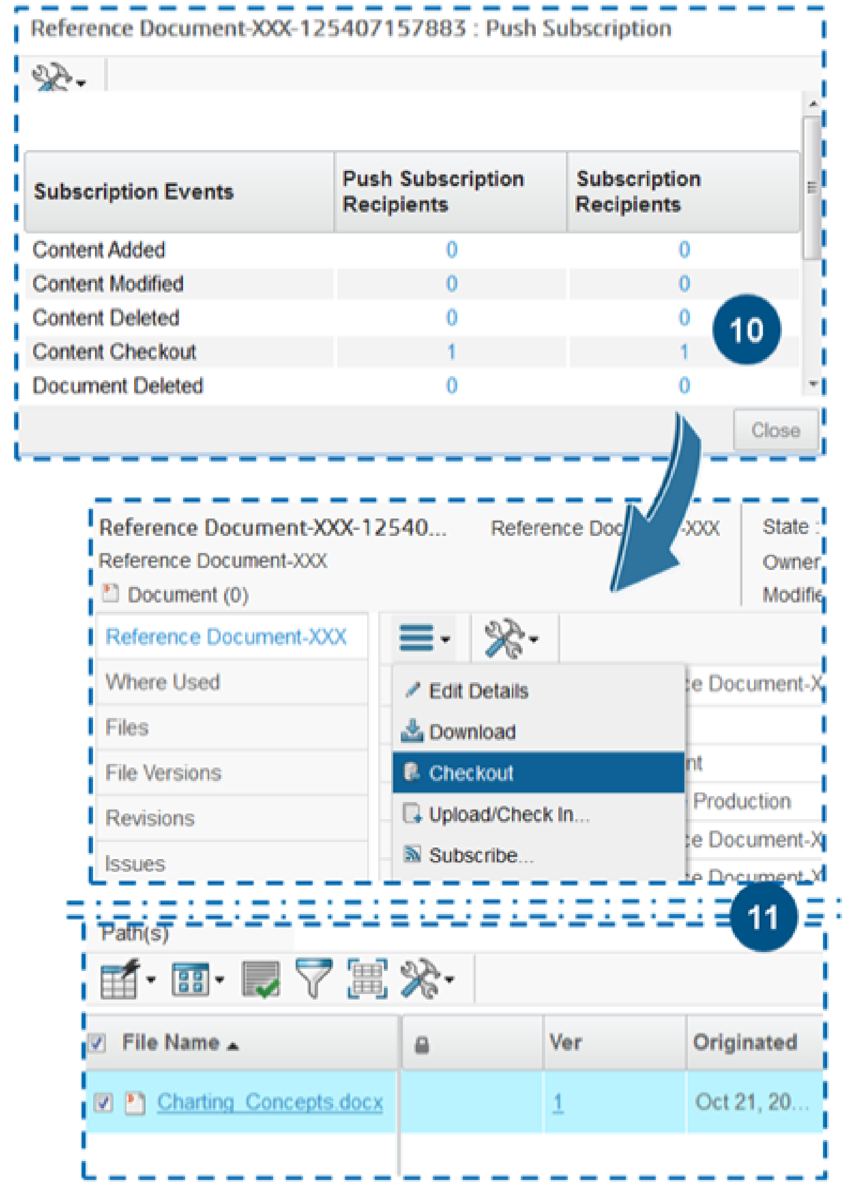
Observe that the recipients have been updated for **Content Checkout**. This means, the recipients will be notified if the content is checked out from the selected document.

10. Click **Close**.

11. Click the **Charting Concepts.docx** check box and select **Actions > Checkout**.

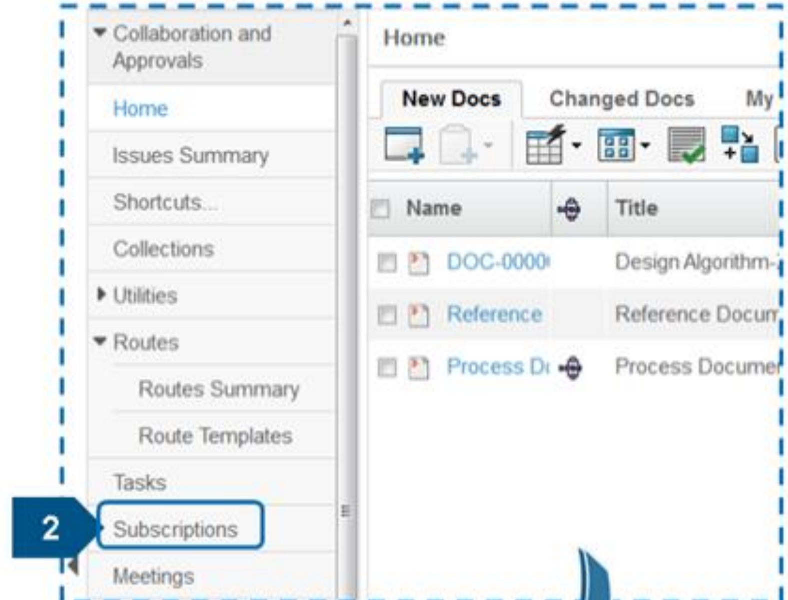
    Save the file on your machine.

12. Log out of the **3D**EXPERIENCE platform.



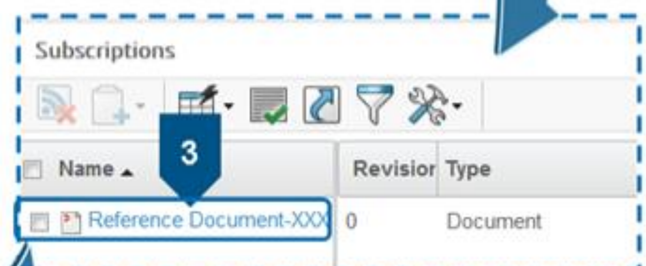
Check for the Updates

1. Log in to the **3D**EXPERIENCE platform with the following credentials:
    a. **Username** or **email**: [Anne-XXX]
    b. **Password**: [Anne-XXX]



2. In the **My Desk** menu, select **Subscriptions**.

   The **Subscriptions** page displays the update for the folder creation event.

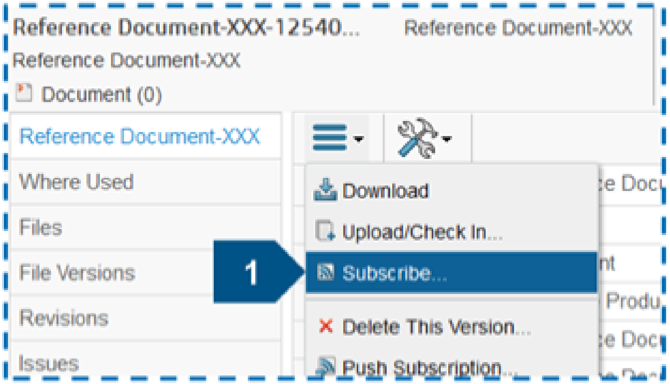


3. Click the **Reference Document-XXX** subscription's name.

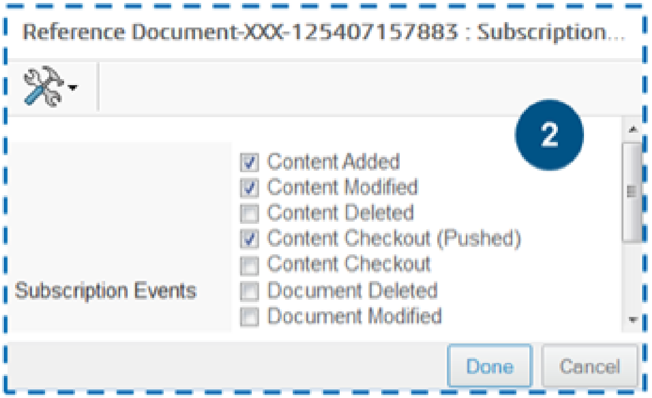
   You can view that the document is checked out.

Subscribe to Object Events

1. In the **Reference Document-XXX** page, select **Actions > Subscribe...**.



2. Select the **Content Added** and **Content Modified** options, and click **Done**.



3. Log out of the **3D**EXPERIENCE platform.

Check In the Updated File

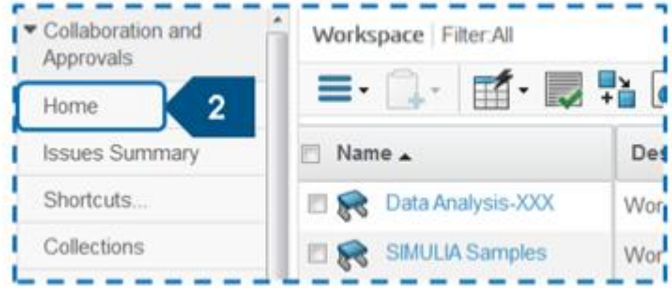
1. Log in to the **3D**EXPERIENCE platform with the following credentials:
    a. **Username** or **email**: [Mark-XXX]
    b. **Password**: [Mark-XXX]

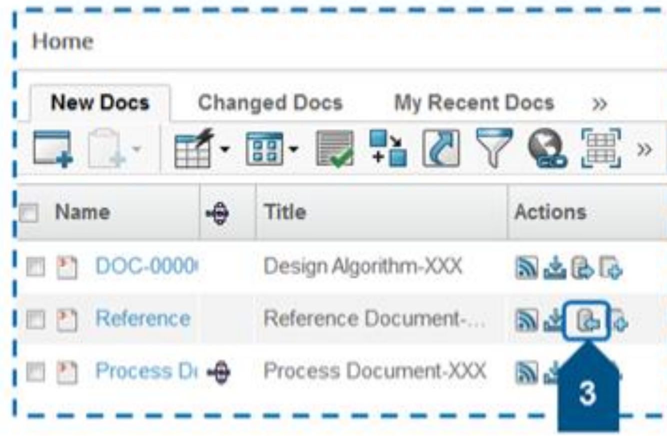
2. In the **My Desk** menu, select **Collaboration and Approvals > Home**.

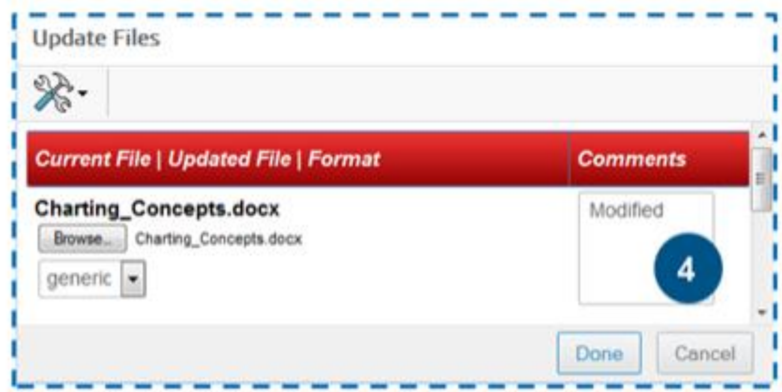
3. In the **Actions** column, select **Checkin**.

4. Browse and select the file we had earlier checked out.

5. Log out of the **3D**EXPERIENCE platform.



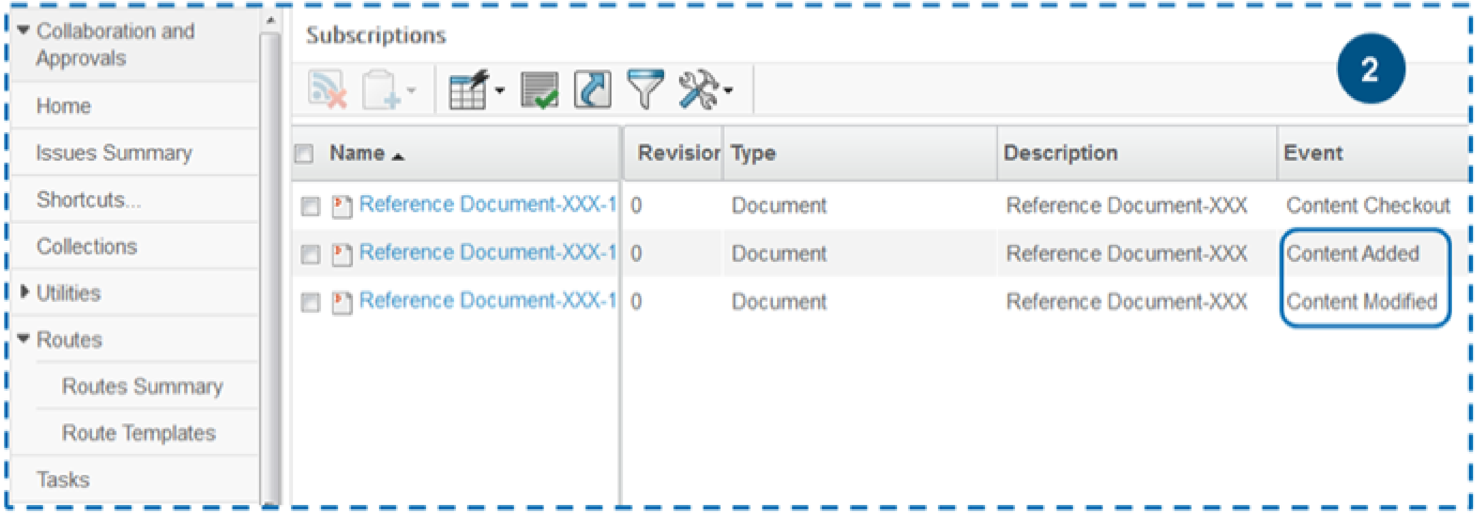




Check the Subscriptions

1. Log in to the **3D**EXPERIENCE platform with the following credentials:
   a. **Username** or **email**: [Anne-XXX]
   b. **Password**: [Anne-XXX]

2. Navigate to the **Subscriptions** page to view the update about the added and modified content.



3. Log out of the **3D**EXPERIENCE platform.

Recap: Subscribe to Object Events

In this exercise, you have:

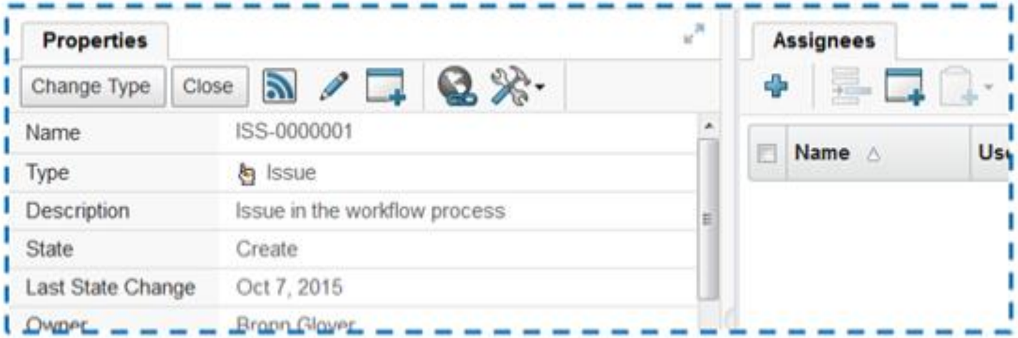
- ✓ Pushed subscriptions to another person
- ✓ Subscribed to object events
- ✓ Checked the subscriptions

Exercise: Create Issues to Report Problems

First, you will log in as Bronn and create an issue for a route. Then you will assign the issue to Anne, who is an Issue Manager. Anne will promote the issue to the assign state, so that the assigned members can start working on it. Bronn and Anne will work on the issue and resolve it. Finally, you will log in as Anne to close the issue.

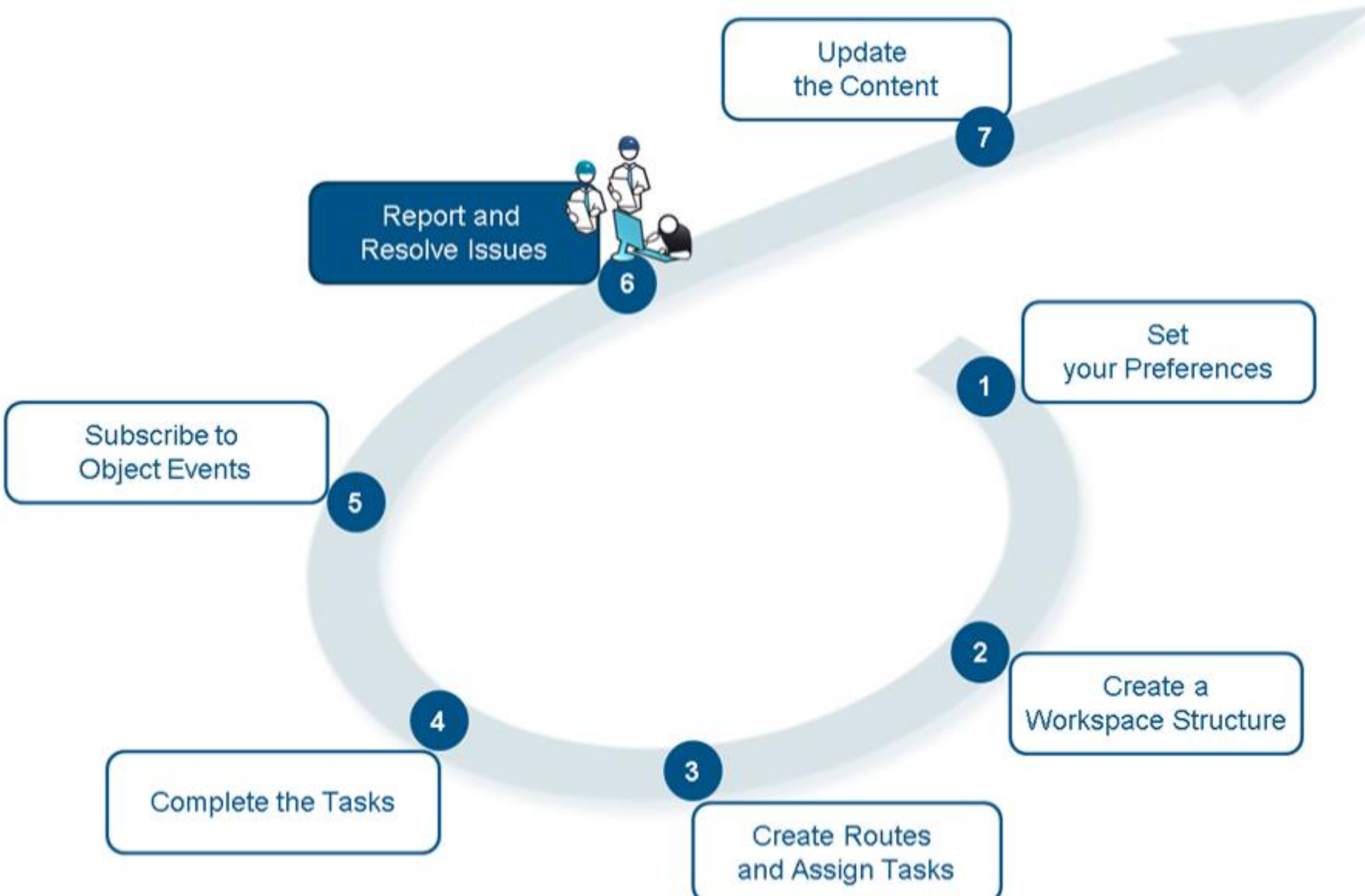
By the end of this exercise you will be able to:

1. Create an Issue Category
2. Create an Issue Classification
3. Create an Issue
4. Add members to resolve the issue
5. Resolve the issue
6. Close the issue



45 minutes

Exercise Progression



Create an Issue (1/4)

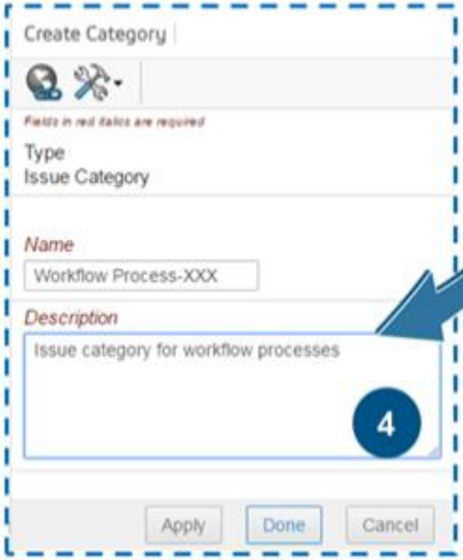
1. Log in to the **3D**EXPERIENCE platform with the following credentials:
   a. **Username or email**: [Xavier-XXX]
   b. **Password**: [Xavier-XXX]

2. Navigate to **Issue Categories** page.

3. Select **Actions** > **Create New Category**.

4. Specify the following details, and click **Done**.
   a. **Name**: [Workflow Process-XXX]

   b. **Description**: Issue category for workflow processes.



Create an Issue (2/4)

5. Select category **Workflow Process-XXX** checkbox.

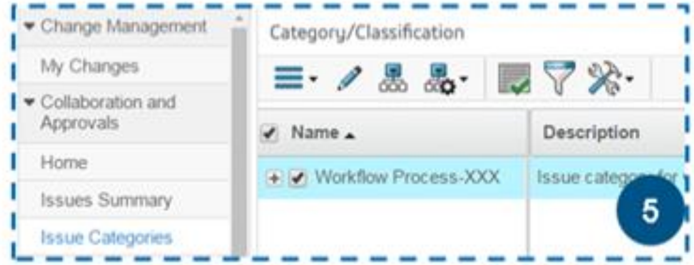
6. Select **Actions** > **Create New Classification**.

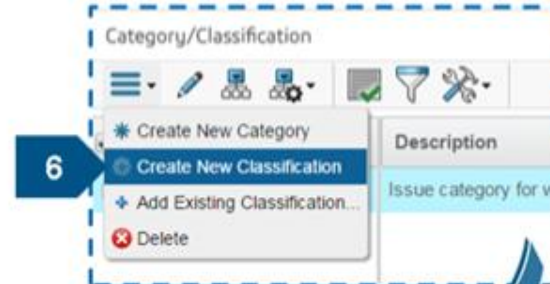
7. Specify the following details, and click **Done**.
   a. **Name**: [Route Workflow-XXX]

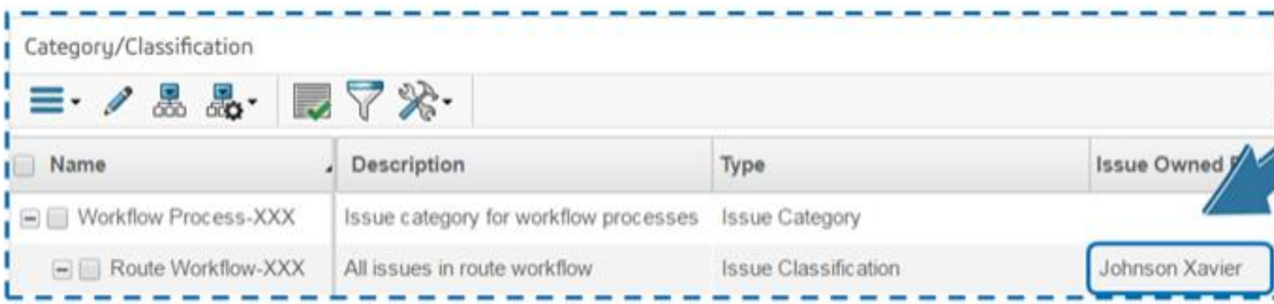
   b. **Description:** All issues in route workflow.

   c. **Issue Owned By** : Xavier-XXX.

8. Log out of the **3D**EXPERIENCE platform.



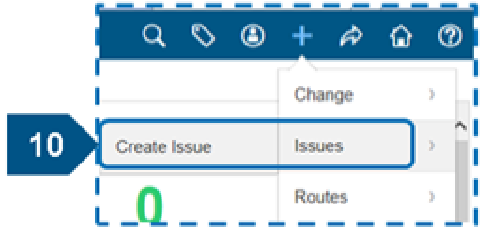




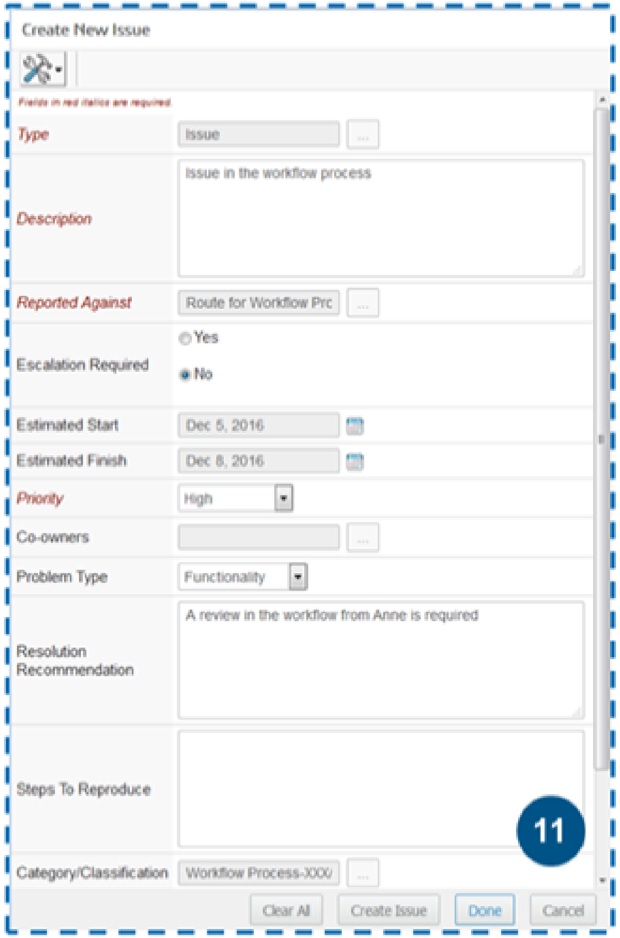
Create an Issue (3/4)

9. Log in to the **3D**EXPERIENCE platform with the following credentials:
    a. **Username or email**: [Bronn-XXX]
    b. **Password**: [Bronn-XXX]

10. In the top bar, select **Add > Issues > Create Issue**.



11. Specify the following details, and click **Done**.
    a. **Description**: [Issue in the workflow process]
    b. **Reported Against**: **Route for Workflow Process-XXX**
    c. **Estimated Start**: (Specify today's date)
    d. **Estimated Finish**: (Specify a date that comes after two days from today)
    e. **Priority**: **High**
    f. **Problem Type**: **Functionality**
    g. **Resolution Recommendation**: [A review in the workflow from Anne is required]
    h. **Category/Classification** : **Route Workflow-XXX**.

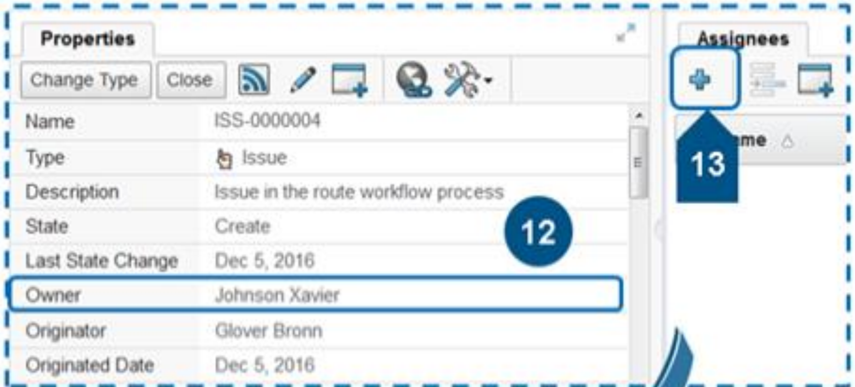


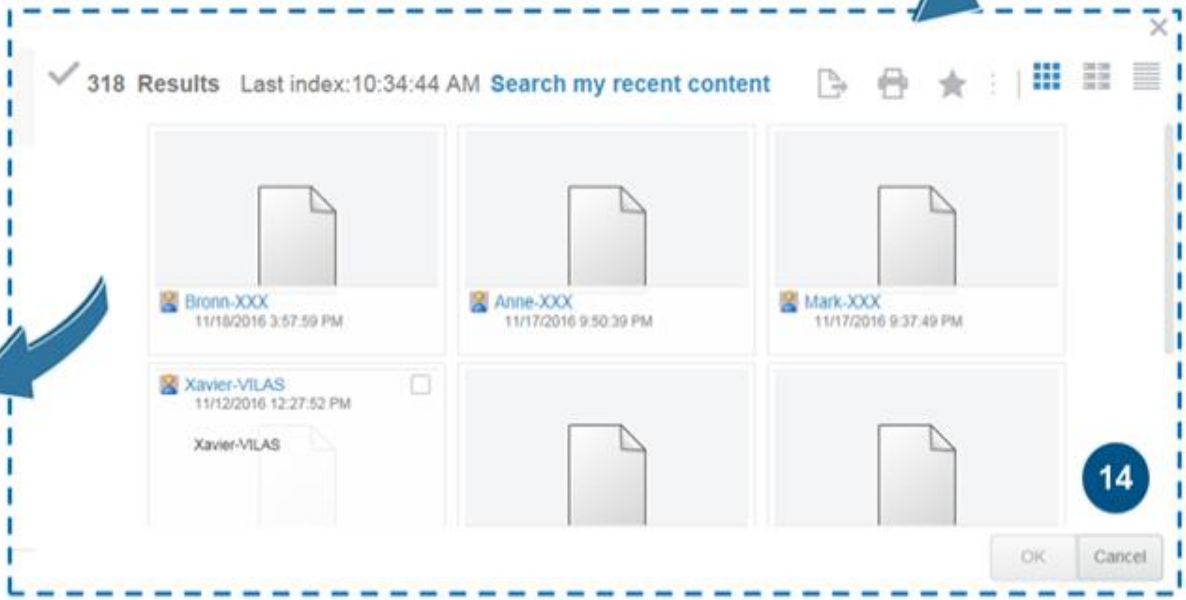
Create an Issue (4/4)

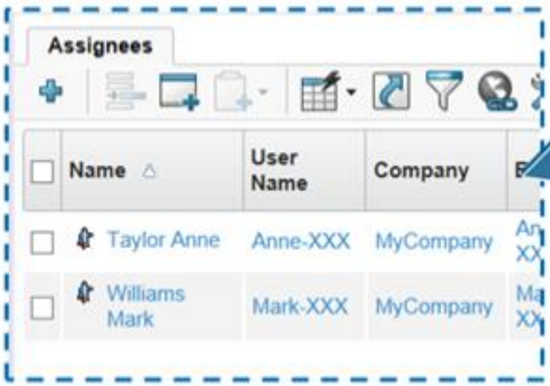
12. As issue category selected is owned by Xavier-XXX, observe that **Owner** of the issue is marked as **Johnson Xavier**.

13. In the **Assignees** tab, click **Add**.

14. Add the members as shown and click **OK**.

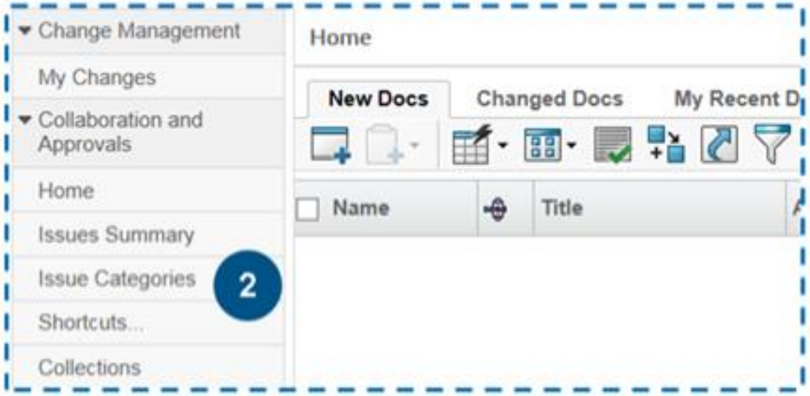






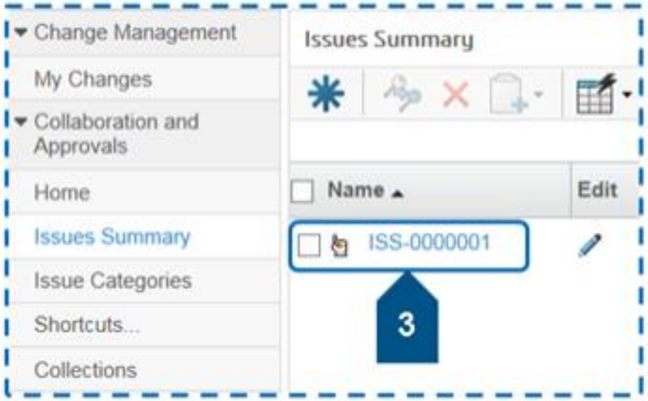
Promote the Issue to the Assign State (1/2)

1. Log in to the **3D**EXPERIENCE platform with the following credentials:
   a. **Username or email**: [Xavier-XXX]
   b. **Password**: [Xavier-XXX]



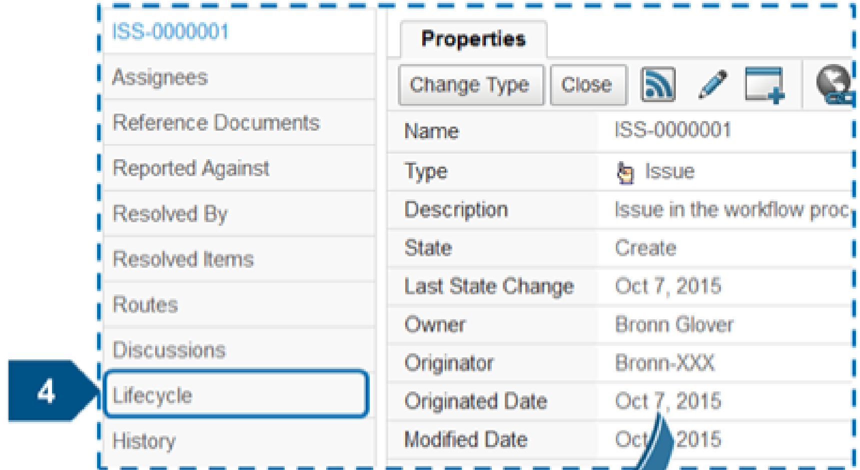
2. Navigate to **Issues Summary** page.

3. Click **ISS-0000001**.

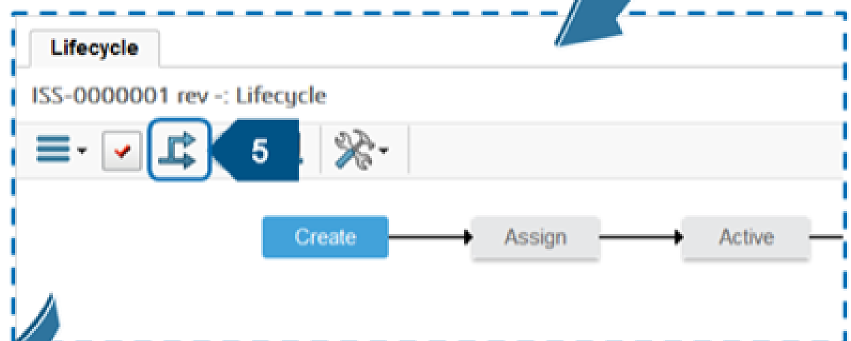


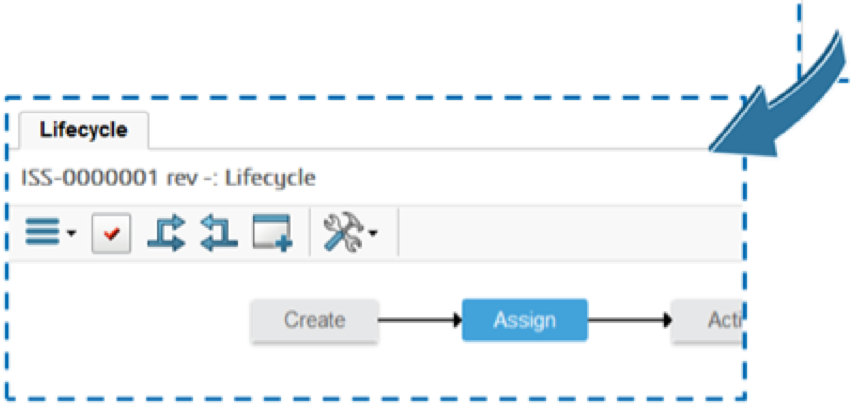
Promote the Issue to the Assign State (2/2)

4. In the category tree, select **Lifecycle**.



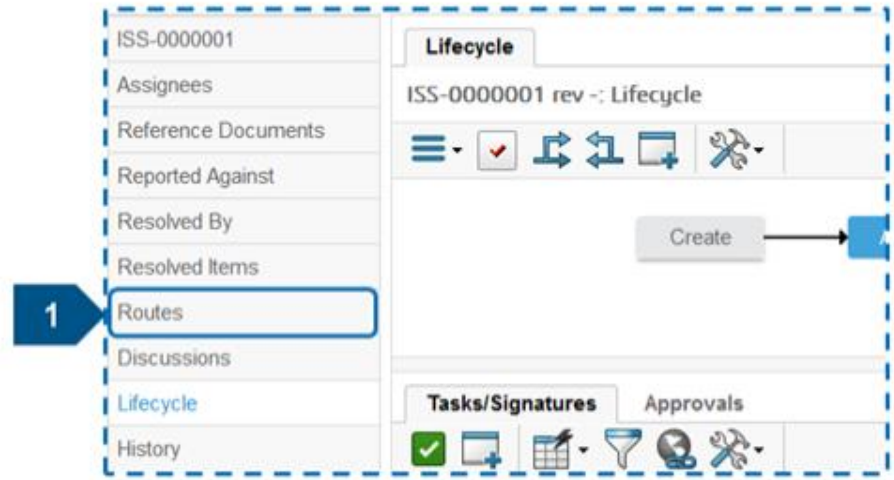
5. Click **Promote**.



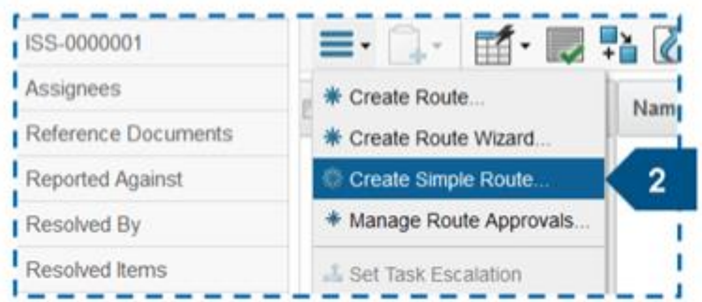


Create a Route to Resolve the Issue (1/2)

1. In the category tree, select **Routes**.



2. Select **Actions > Create Simple Route...**.



Create a Route to Resolve the Issue (2/2)

3. Specify the following details, and click **Done**:
   a. Click **Add Content**, and select the **Process Document-XXX**.

   b. Instruction: [Approve]

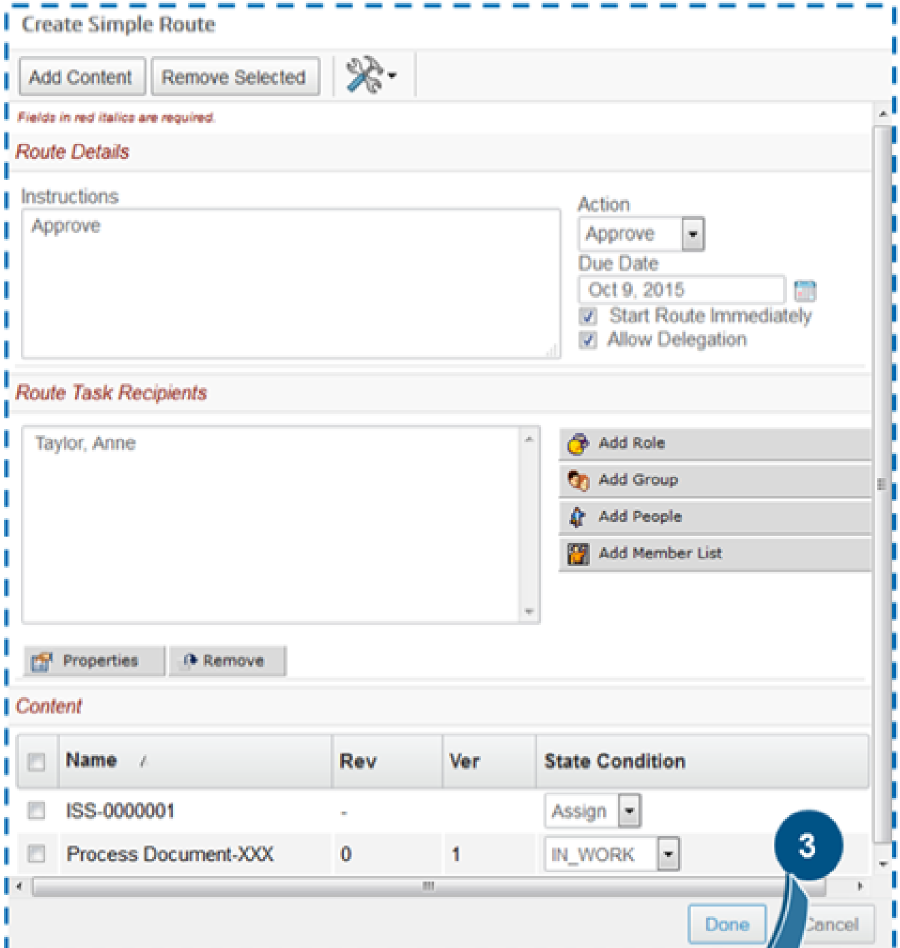
   c. Actions: **Approve**

   d. Due Date: Specify a date that comes two days after today's date.

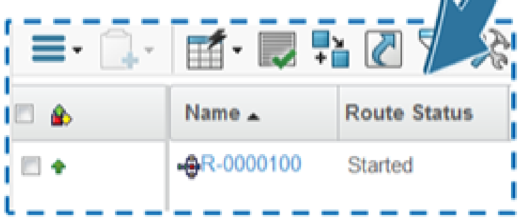
   e. Select the **Start Route Immediately** check box.

   f. Select the **Allow Delegation** check box.

   g. Route Task Recipients: Click **Add People** to add **Anne Taylor** (**Anne-XXX**).



4. Log out of the **3D**EXPERIENCE platform.

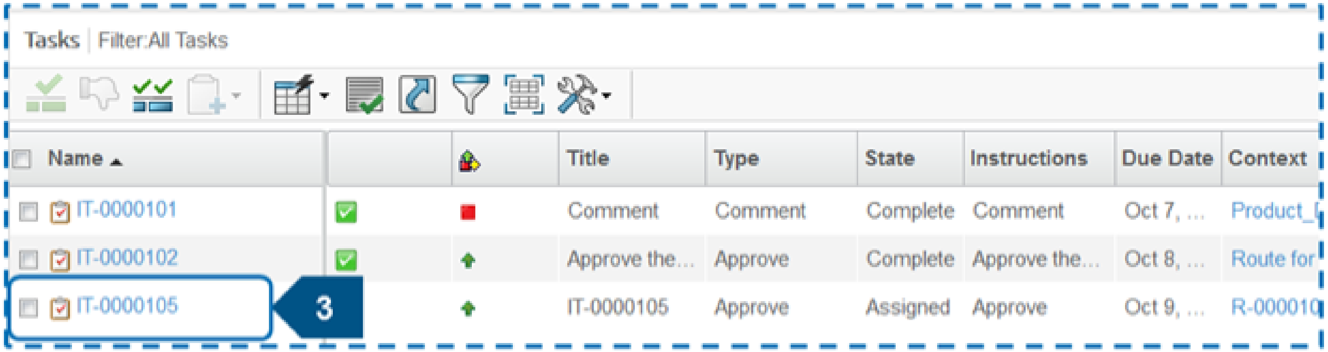


Change the Task Assignee (1/2)

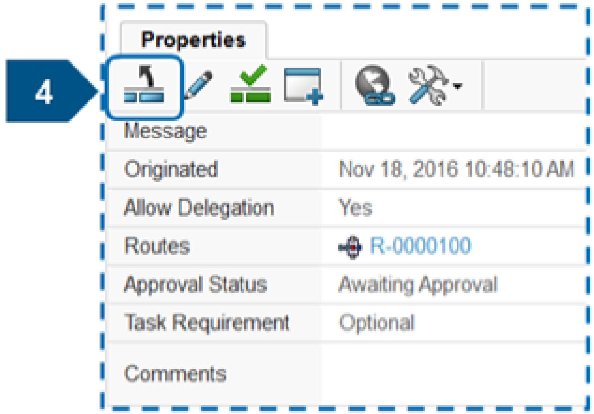
1. Log in to the **3D**EXPERIENCE platform with the following credentials:
   a. **Username** or **email**: [Anne-XXX]
   b. **Password**: [Anne-XXX]

2. Navigate to the **Tasks** page.

3. Click the task name that is in the **Assigned** state.



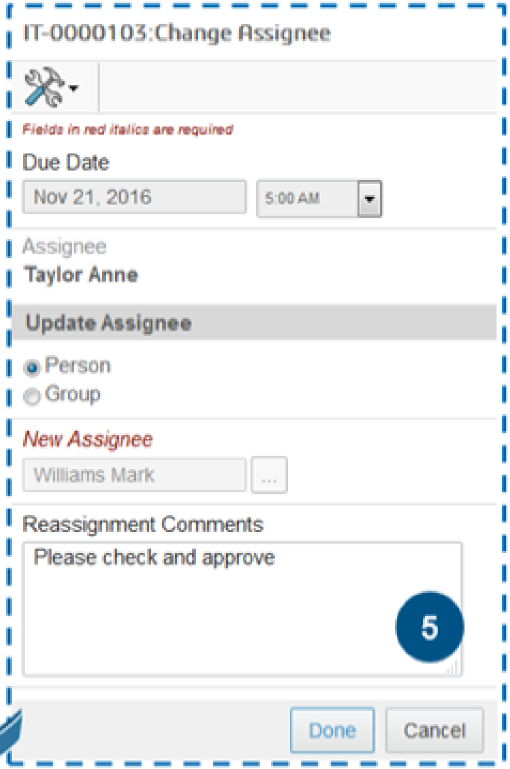
4. In the page toolbar, Click **Change Assignee…**.



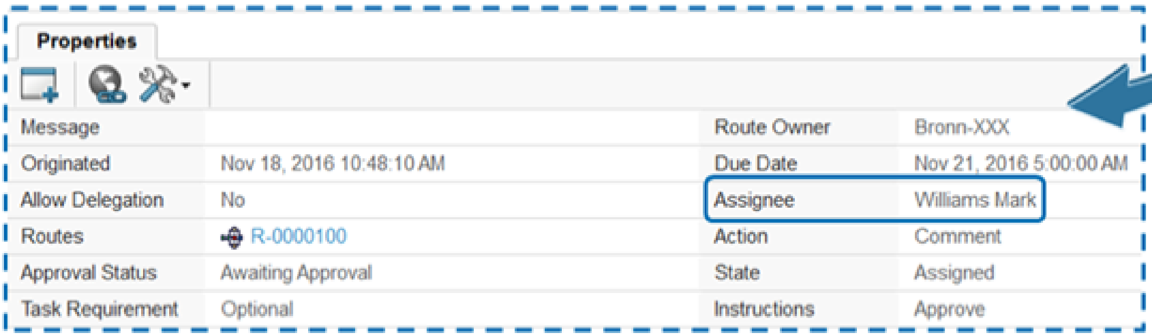
Change the Task Assignee (2/2)

5. Specify the following details, and click **Done**:
   a. **New Assignee**: **Mark-XXX**

   b. **Reassignment Comments**: [Please check and approve]



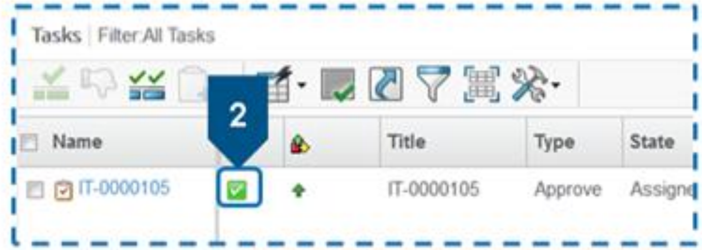
Observe that the Assignee has been updated.



6. Log out of the **3D**EXPERIENCE platform.

Resolve the Issue (1/2)

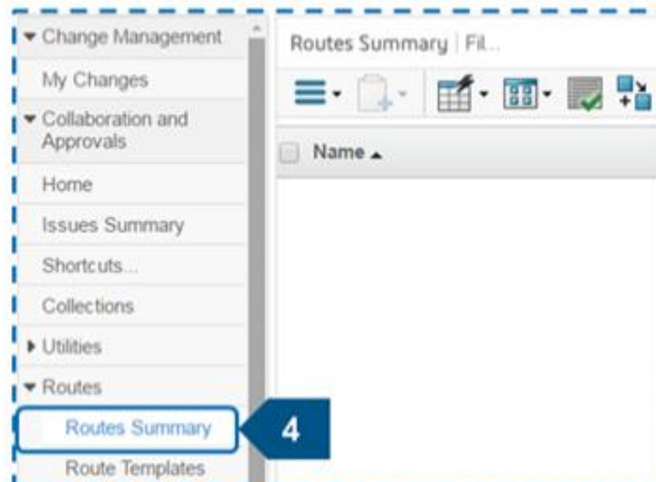
1. Log in to the **3D**EXPERIENCE platform with the following credentials:
   a. **Username or email**: [Mark-XXX]
   b. **Password**: [Mark-XXX]



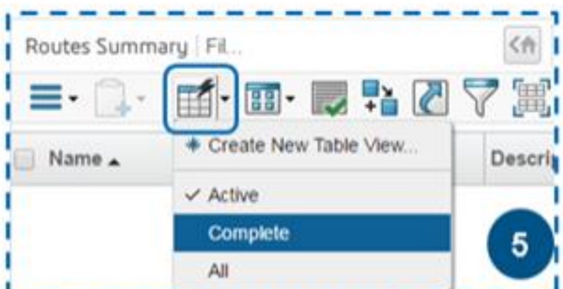
2. Navigate to the **Tasks** page, and click the **Edit Task** icon.

3. Specify the **Comments** as [Approved], and click **Done**.

4. Navigate to **Routes> Routes Summary**.

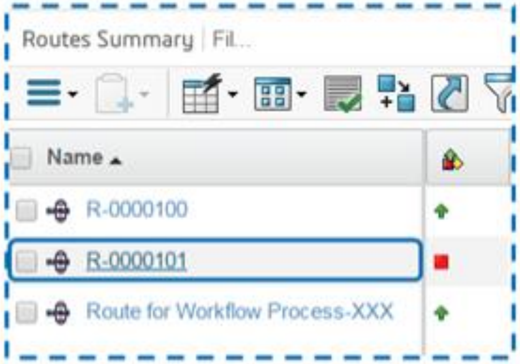


5. In the page toolbar, Click **View** and select **Complete**.

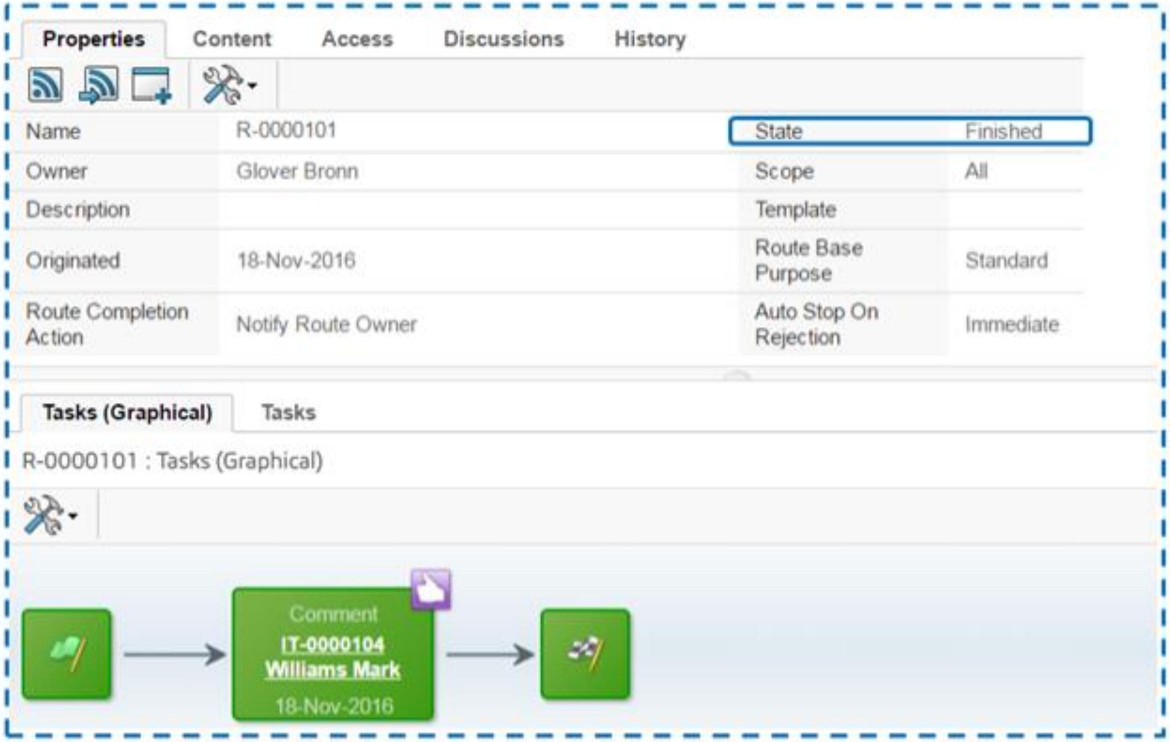


Resolve the Issue (2/2)

6. Click the route name.
   The route is finished, and now Anne must close the issue.



7. Log out of the **3D**EXPERIENCE platform.

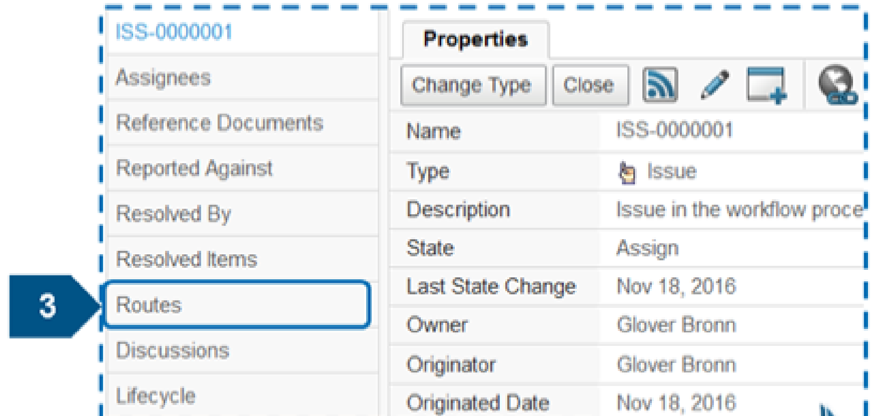


Close the Issue (1/2)

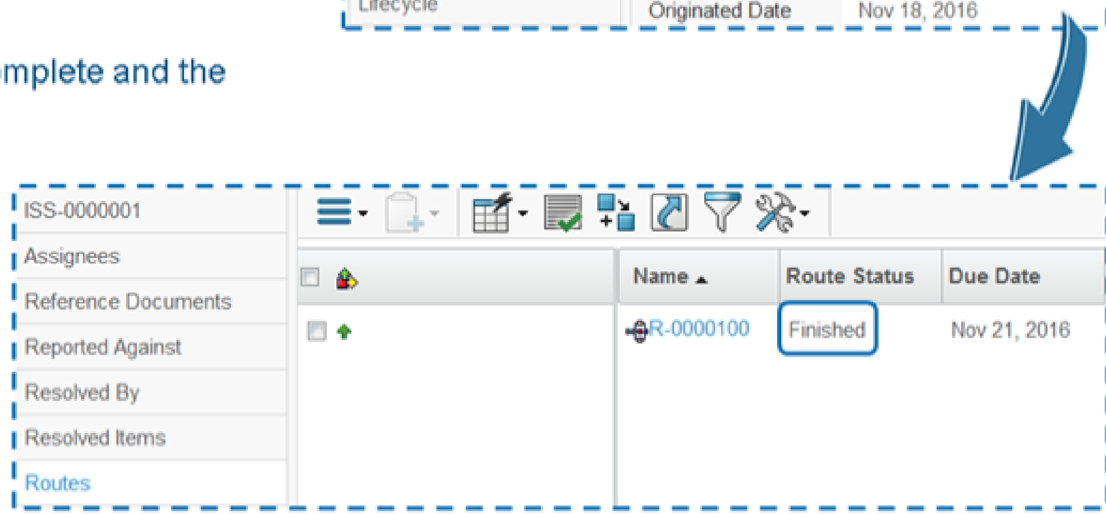
1. Log in to the **3D**EXPERIENCE platform with the following credentials:
    a. **Username or email**: [Anne-XXX]
    b. **Password**: [Anne-XXX]

2. Navigate to the issues page.

3. In the category tree, select **Routes**.



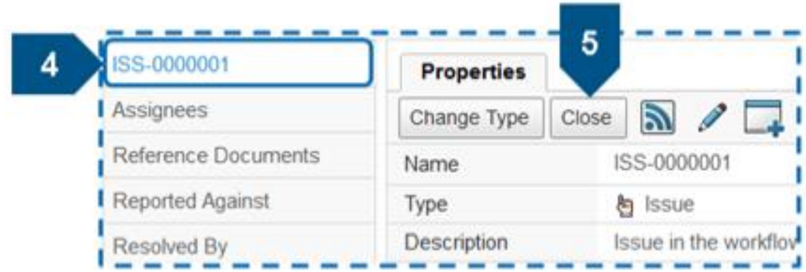
You can observe that the route is complete and the issue can be closed.



Close the Issue (2/2)

4. Navigate to the issue's **Properties** page.

5. In the page toolbar, click **Close**.

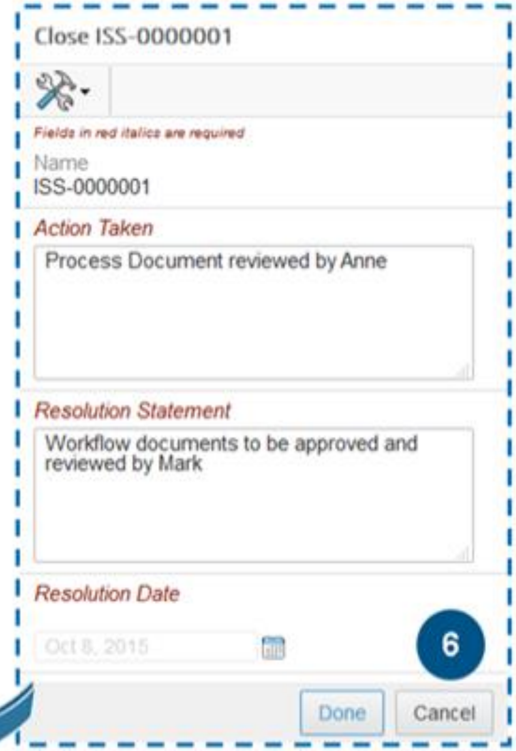


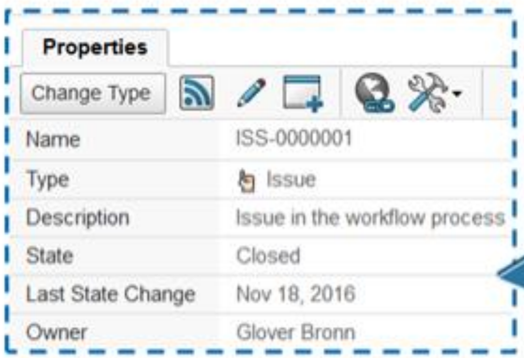
6. Specify the following resolution comments, and click **Done**:

   a. **Action Taken**:[Process Document reviewed by Anne]

   b. **Resolution Statement**:[Workflow documents to be approved and reviewed by Mark]

   c. **Resolution Date**: (Specify today's date)





Recap: Create Issues to Report Problems

In this exercise, you have:

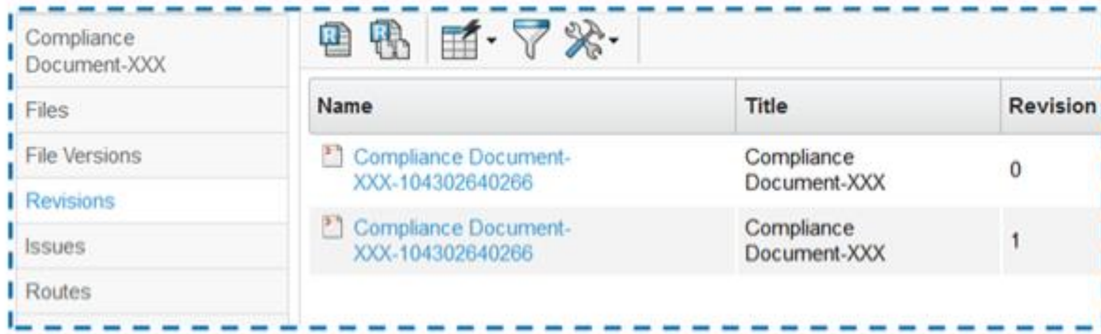
- ✓ Created an Issue Category
- ✓ Created an Issue Classification
- ✓ Created an Issue
- ✓ Added members to resolve the issue
- ✓ Resolved the issue
- ✓ Closed the issue

Exercise: Create and Organize your Content

Here, you will log in as Mark and create some content for your workspace. Then you will upload files, and update them by creating different versions. You will also release documents and then create their new revisions.

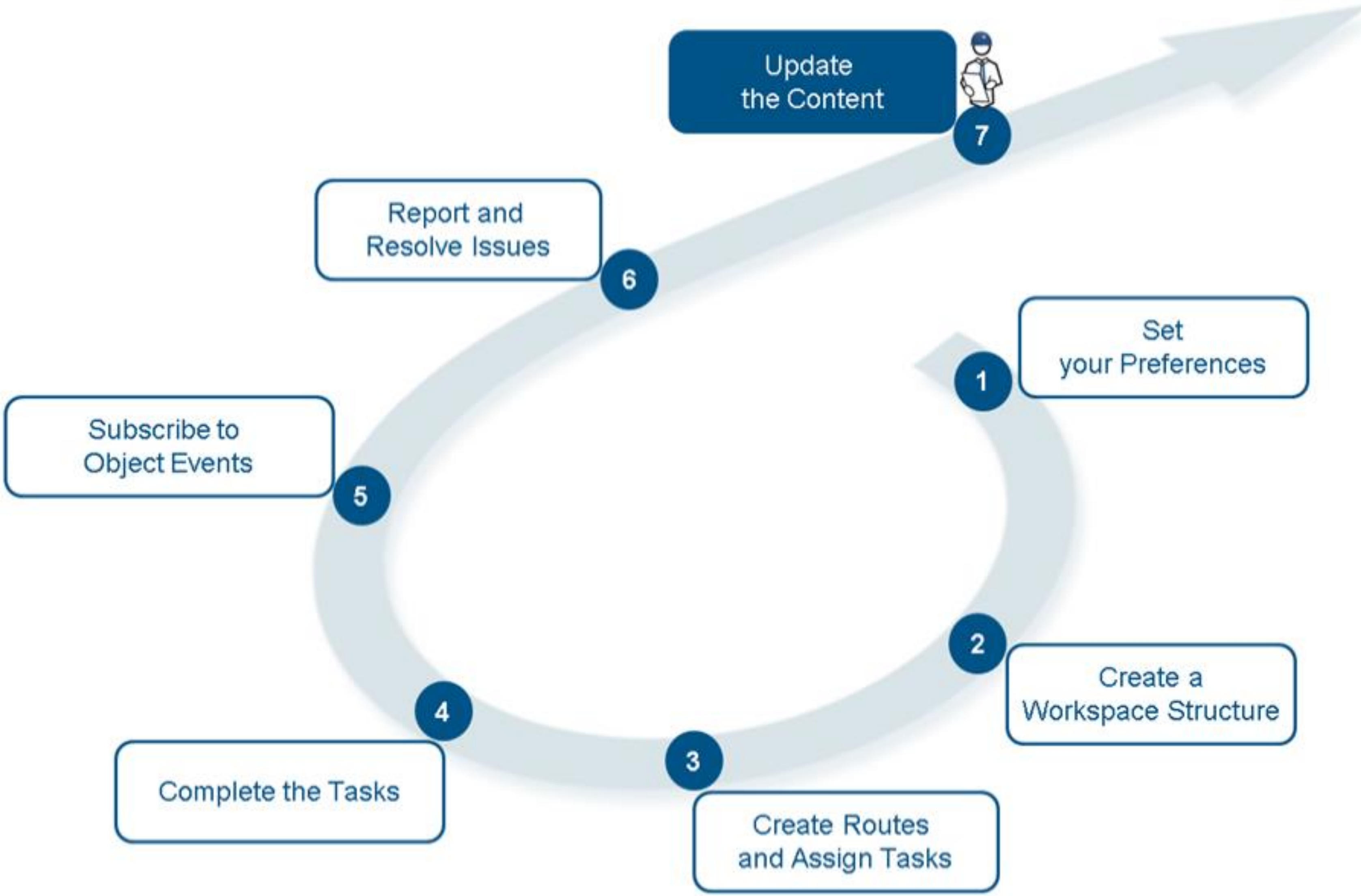
By the end of this exercise you will be able to:

1. Create a new document
2. Upload files to documents
3. Create versions of the files
4. Revise the documents



25 minutes

Exercise Progression

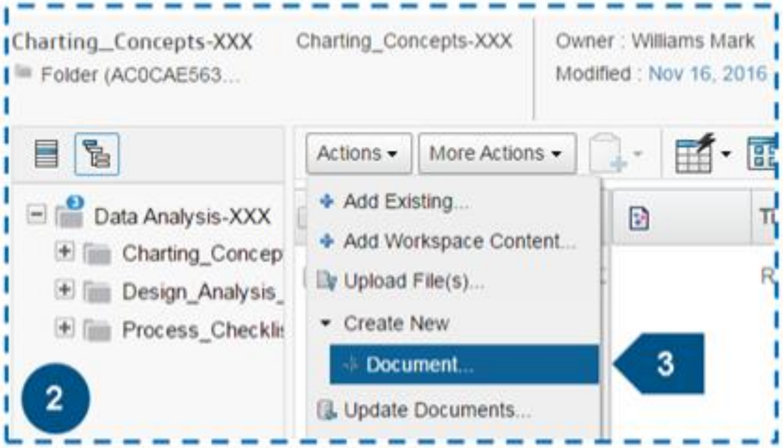


Create a new Document (1/2)

1. Log in to the **3D**EXPERIENCE platform with the following credentials:
    a. **Username or email**: [Mark-XXX]
    b. **Password**: [Mark-XXX]

2. Navigate to the **Charting_Concepts-XXX** folder page.

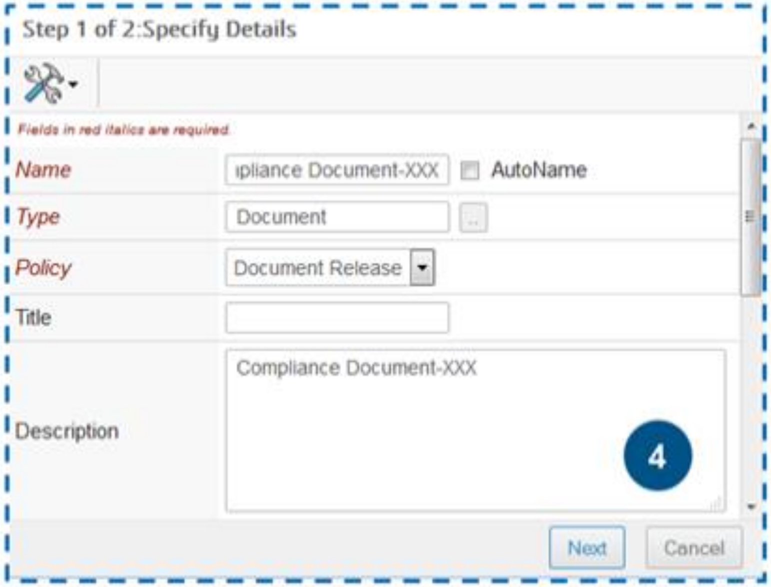
3. In the page toolbar, select **Actions > Create New > Document...**.



4. Specify the following details, and click **Next**:

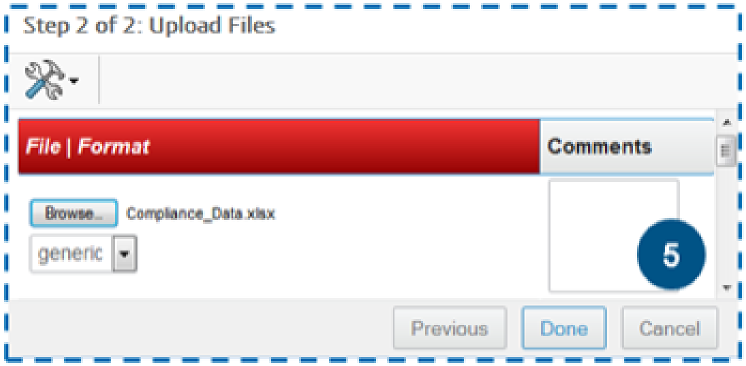
    a. **Name**: [Compliance Document-XXX]

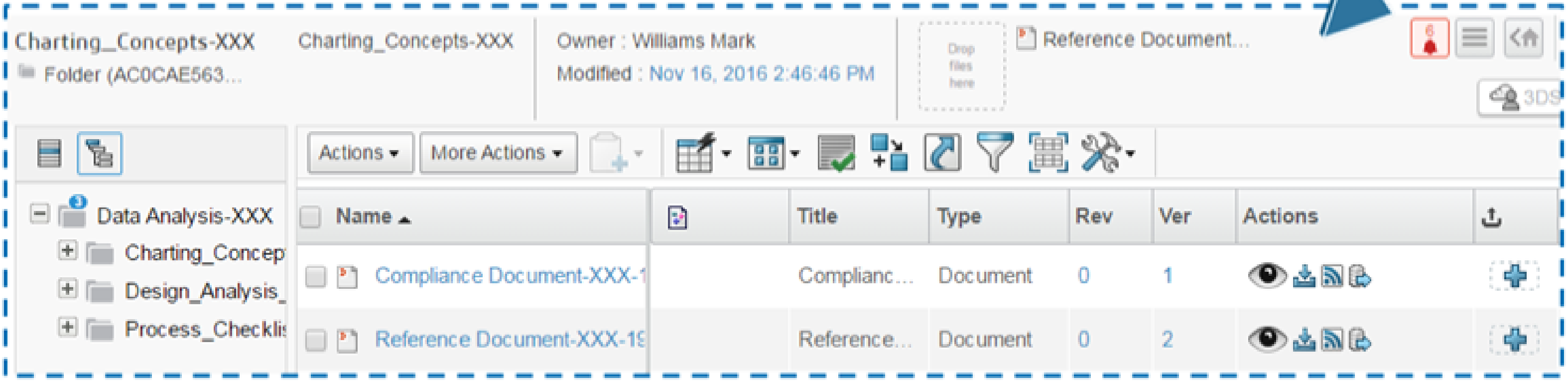
    b. **Description**: [Compliance Document-XXX]



Create a new Document (2/2)

5. Upload the document *Complaince_Data.xlsx* from the location *C:\BUPS_R2017x_Data*, and click **Done**.



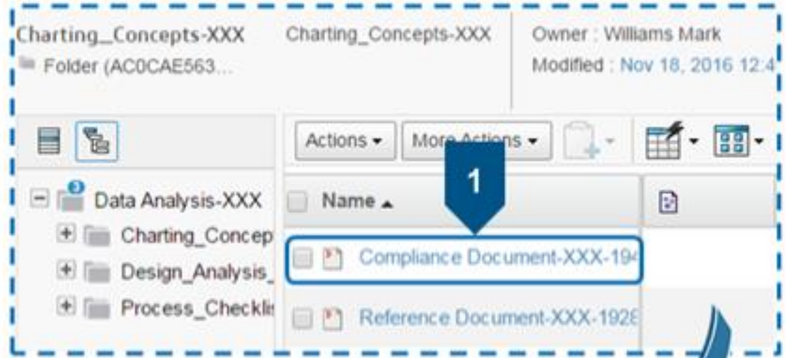


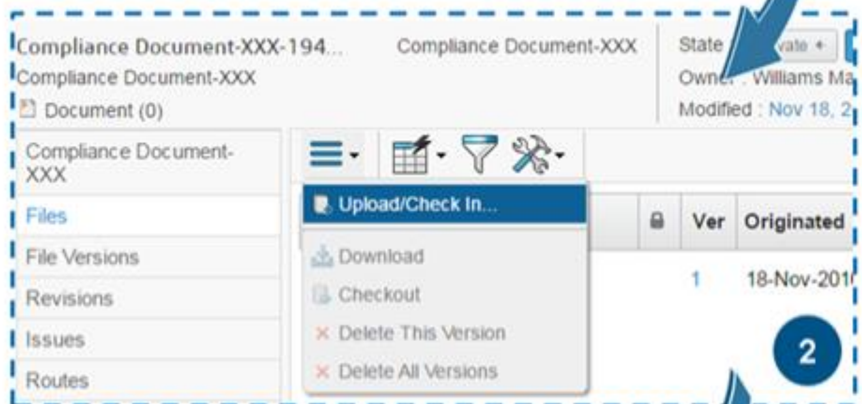
Add Files to the Document

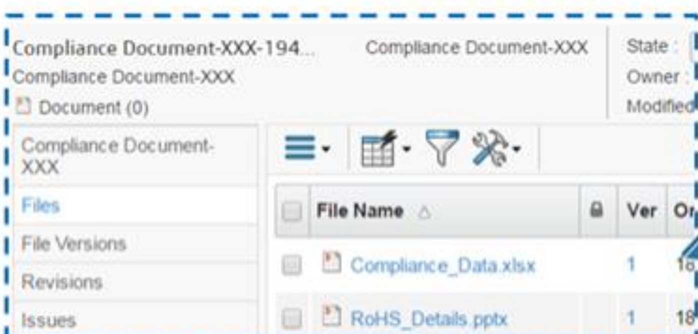
1. In the **Charting_Concepts-XXX** page, click on the name of newly created document.

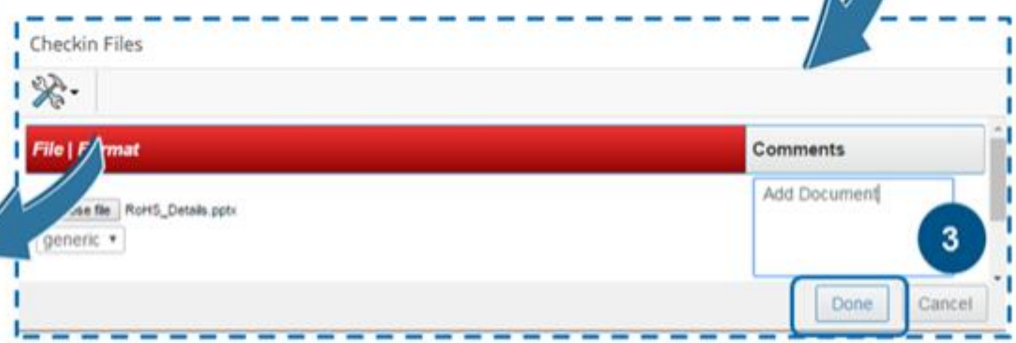
2. In the page toolbar, click **Actions** menu and select **Upload/Check In…**

3. Upload the document *RoHS_Details.pptx* from the location *C:\BUPS_R2017x_Data*, and click **Done**.



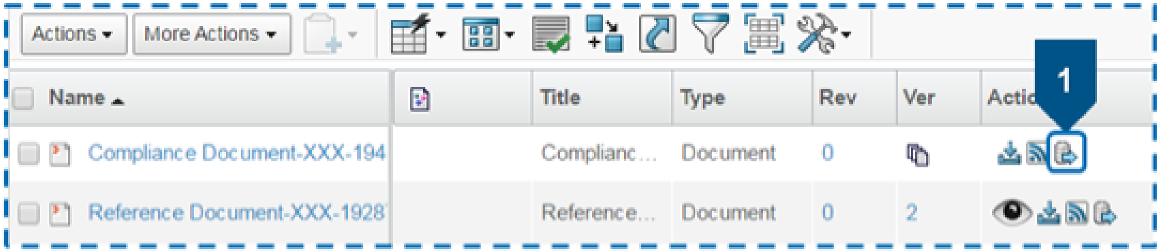






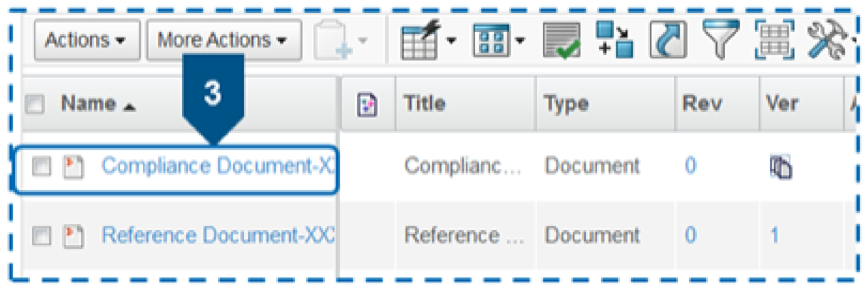
Check Out Files from a Document (1/2)

1. In the **Charting_Concepts-XXX** page, click the **Check Out For Edit** icon for the **Compliance Document**.

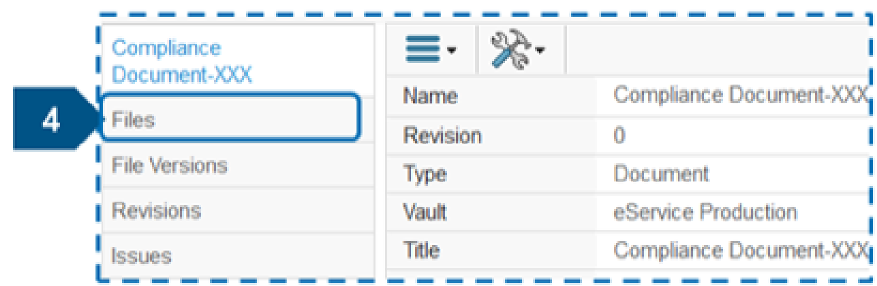


2. Select the **Save As** option and save the document as *Compliance_Documents_XXX1*.
   The document will be saved as a zipped folder.

3. Click **Compliance Document-XXX**.

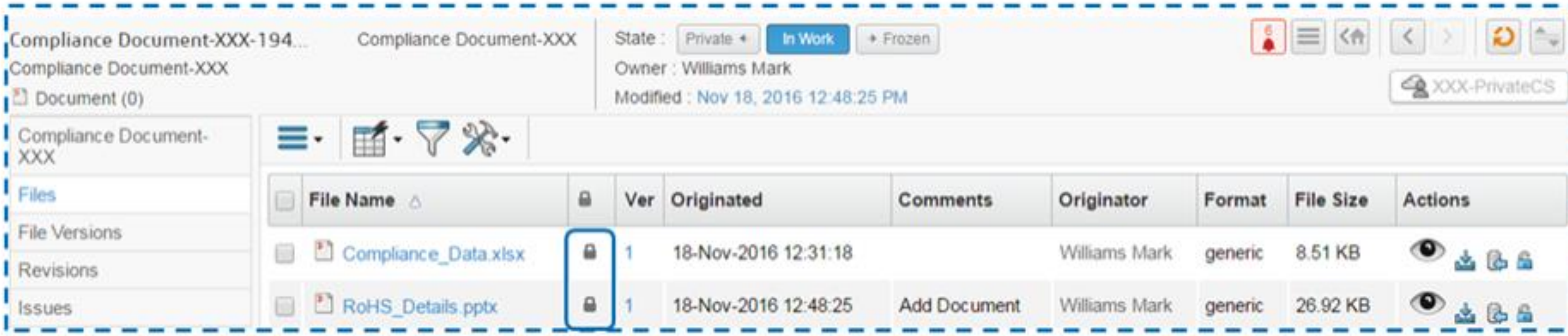


4. In the category tree, select **Files**.



Check Out Files from a Document (2/2)

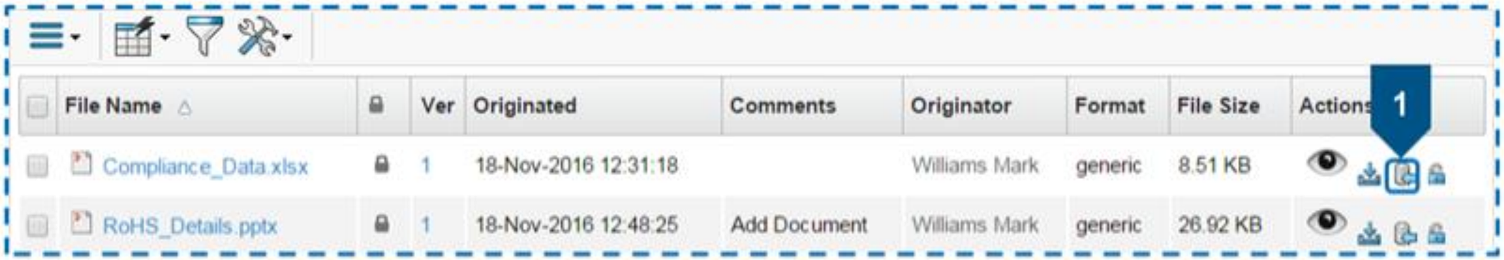
Observe that when the files are checked out, the **Locked Files** icon shows the files that are locked for editing.



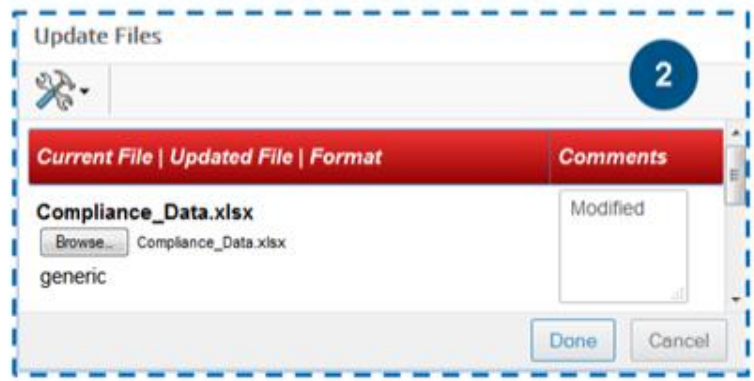
5. Unzip the *Compliance_Documents_XXX1* folder, and make some changes in the files. Save and close it.

Check In the Updated Files (1/2)

1. Click the **Check In** icon for **Compliance_Data.xslx** to upload the updated files.



2. Upload the same edited file that you checked out, and specify the **Comments** as shown. Click **Done**.



Check In the Updated Files (2/2)

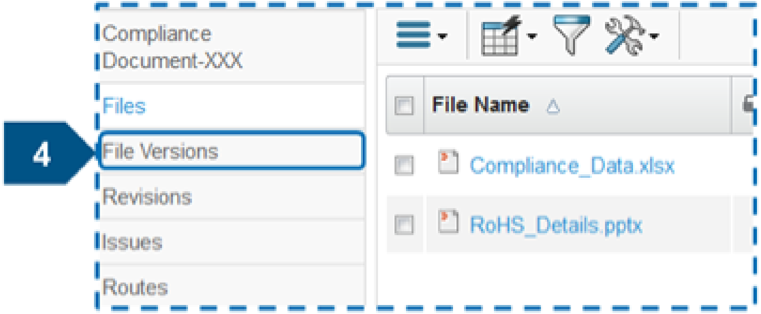
3. Similarly, check in the **RoHS_Details.pptx** file.

File Name		Ver	Originated	Comments	Originator	Format	File Size	Actions
Compliance_Data.xlsx		2	May 24, 2017 5:04:19 PM	Modified	Mark Williams	generic	8.51 KB	
RoHS_Details.pptx		2	May 24, 2017 5:04:33 PM	Modified	Mark Williams	generic	26.92 KB	

3

4. In the category tree, select **File Versions**.

   Observe that the versions are updated.

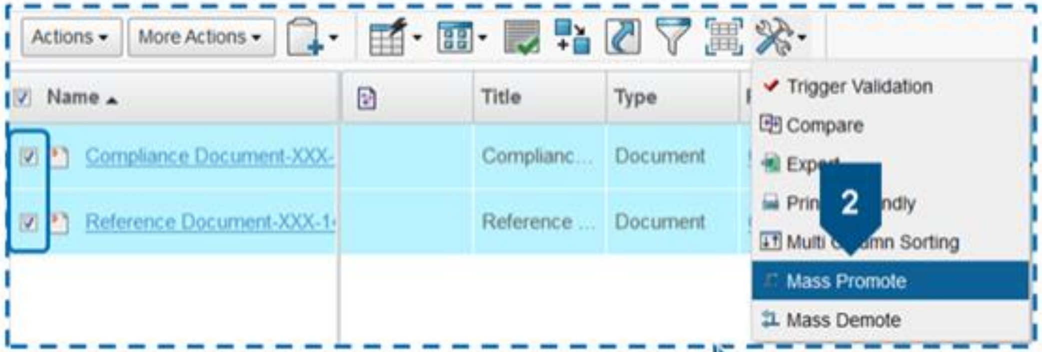


Ver	File Name	Originated	Comments	Owner	Format	File Size	Actions
1	RoHS_Details.pptx	May 24, 2017 5:00:06 PM		Mark Williams	generic	26.92 KB	
2	RoHS_Details.pptx	May 24, 2017 5:04:33 PM	Modified	Mark Williams	generic	26.92 KB	
1	Compliance_Data.xlsx	May 24, 2017 4:59:32 PM		Mark Williams	generic	8.51 KB	
2	Compliance_Data.xlsx	May 24, 2017 5:04:19 PM	Modified	Mark Williams	generic	8.51 KB	

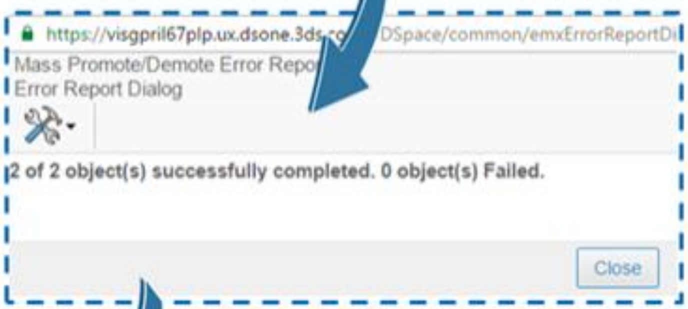
Release the Documents

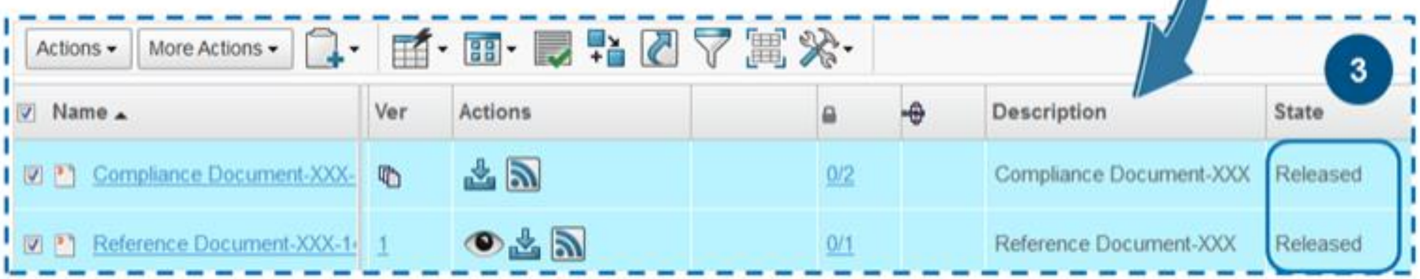
1. In the page header, click **Back**.

2. Select all the documents and select **Tools > Mass Promote**.



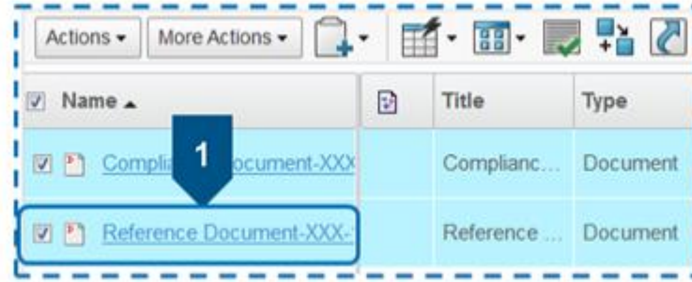
3. Similarly, promote the documents to the **Released** state.



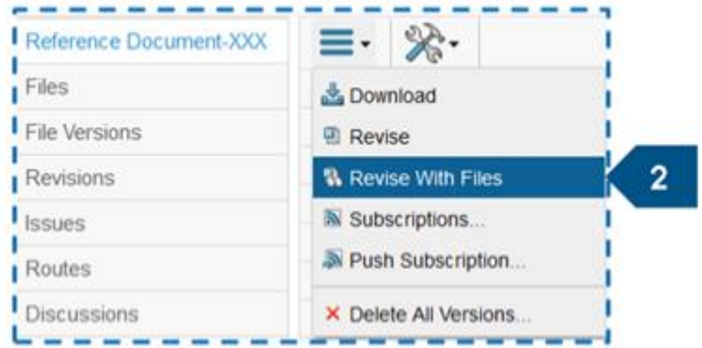


Create a Document Revision with its Files (1/2)

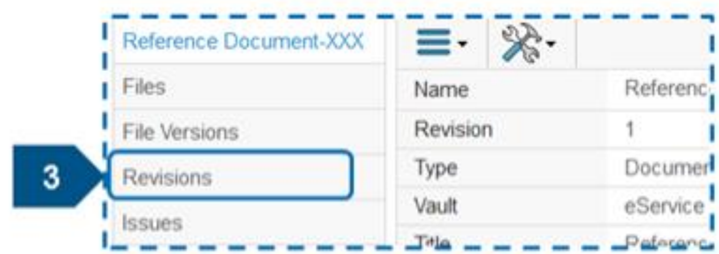
1. Click **Reference Document-XXX**.



2. In the page toolbar, select **Actions > Revise With Files**.



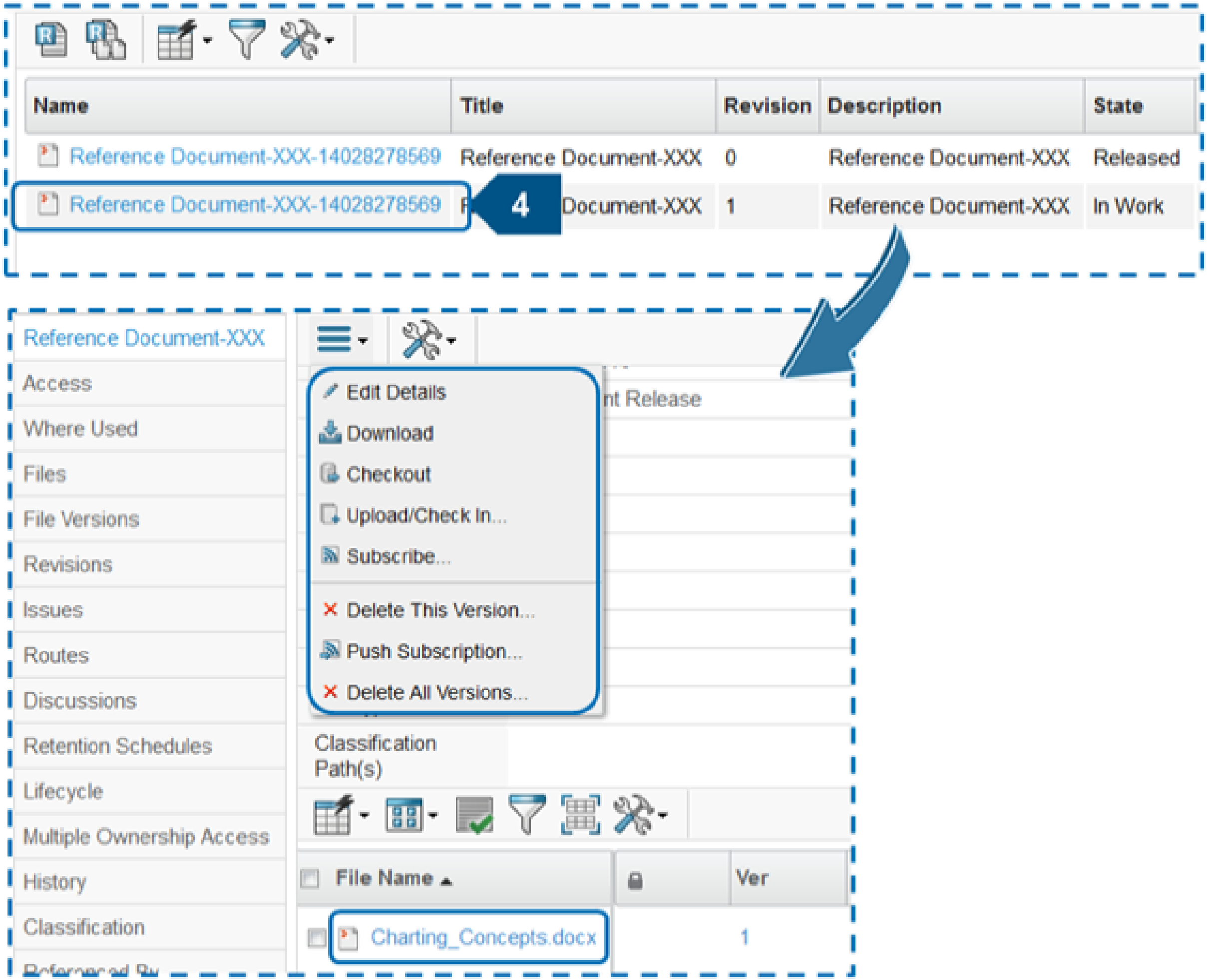
3. In the category tree, select **Revisions** to view the released as well as the revised files.



Create a Document Revision with its Files (2/2)

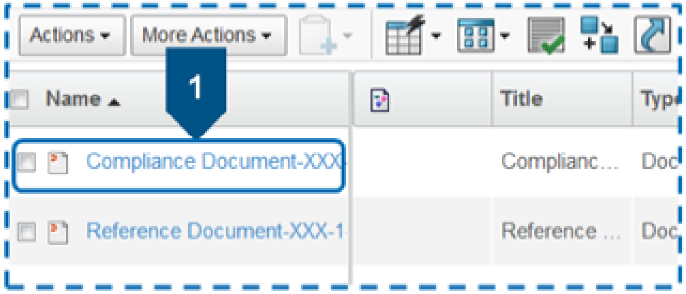
4. Click the document with the new revision (in the **In Work** state).

   Observe that the files are attached after creating the new revision. Also observe, that there is no command for creating revisions for this document, because it is not released yet.

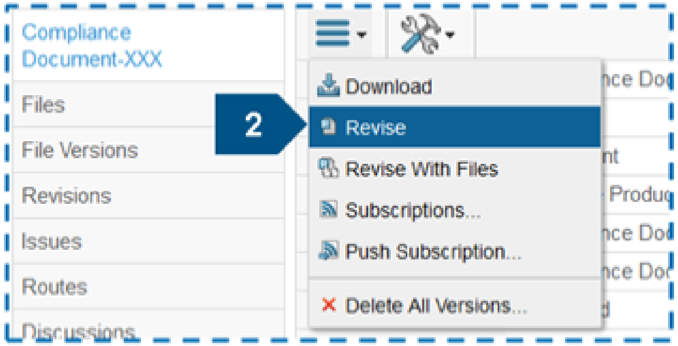


Create a Document Revision without its Files (1/2)

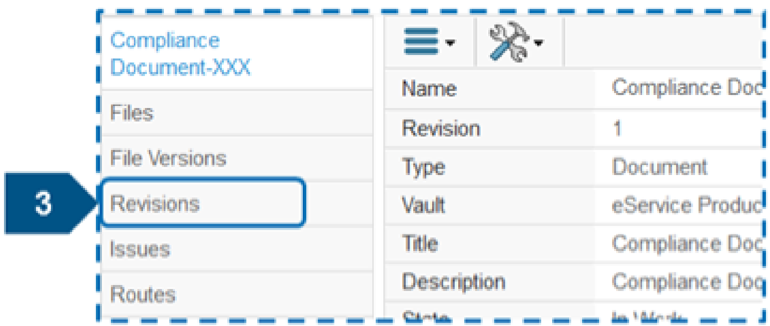
1. Navigate to **Compliance Document-XXX**.



2. In the page toolbar, select **Actions > Revise**.



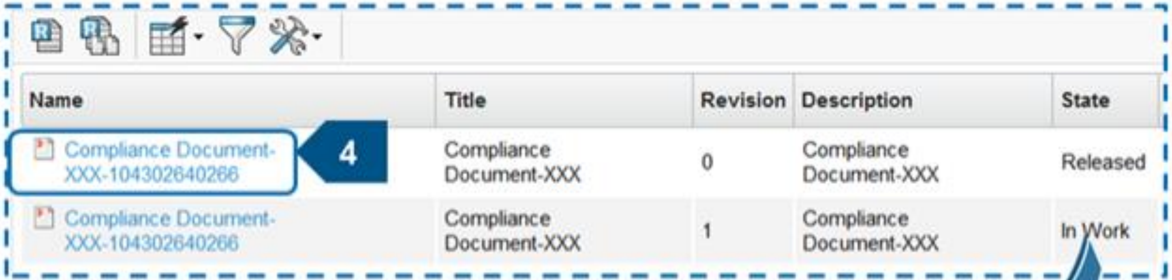
3. In the category tree, select **Revisions** to view the released as well as the revised files.

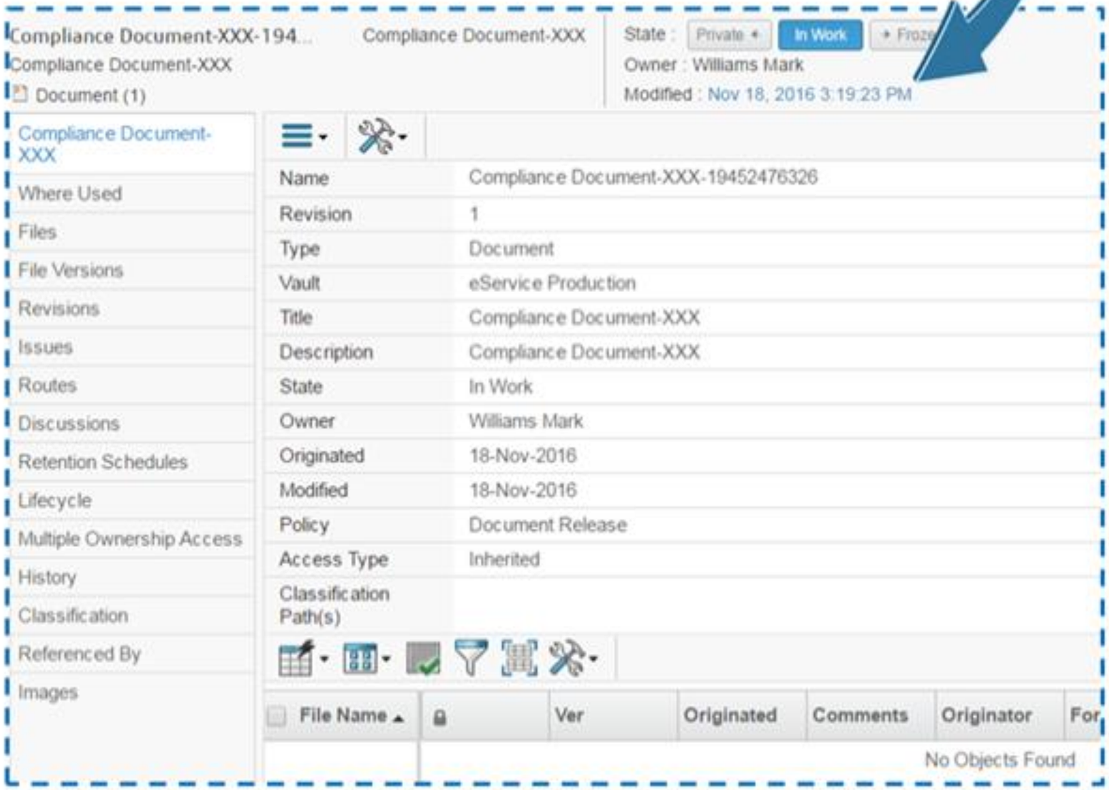


Create a Document Revision without its Files (2/2)

4. Click the document with the new revision(in the **In Work** state).

   Observe that the files are not attached in the new revision.





Recap: Create and Organize your Content

In this exercise, you have:

- ✓ Created a new document
- ✓ Uploaded files to documents
- ✓ Created versions of the files
- ✓ Revised the documents

Appendix

The additional topics mentioned below give an overview of the administrative functionalities of the **Collaboration and Approvals** menu..

Topics Covered:

- People and Organization
  - Company Profile Management
- Utilities
  - Background Jobs
  - Reload Cache
  - MQL

Company Profile Management (1/6)

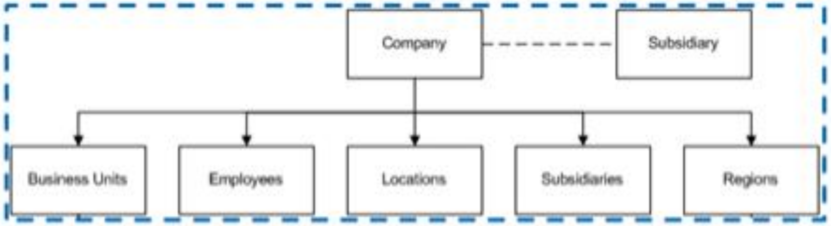
Company Profile Management deals with managing the process flow in a company.

A. Companies

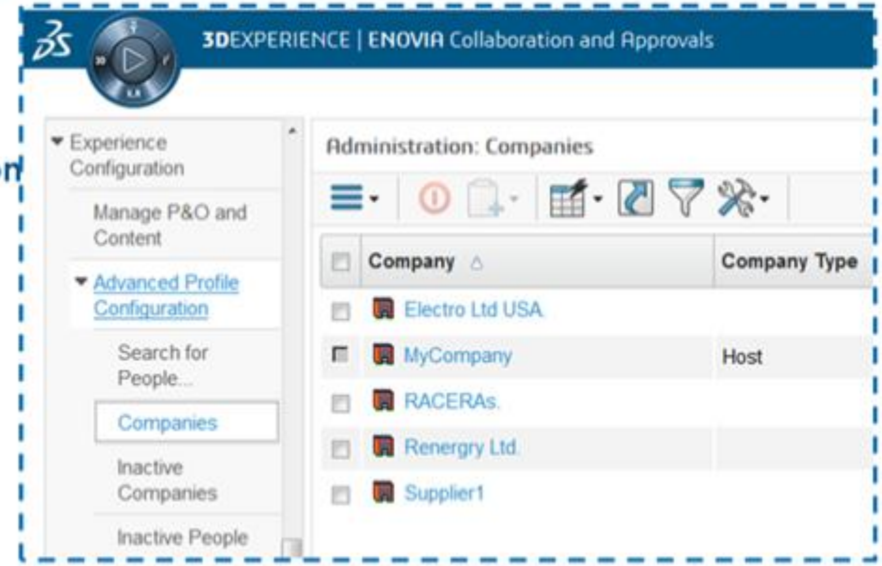
A company is the top level business entity in an organizational structure.

The **Companies** page, lists the companies defined in the database. The user must have the Employee and the Member role to access this page.

To view this page; in the **My Desk** menu, select **Collaborations and Approvals > Experience Configuration > Advanced Profile Configuration > Companies**.



Organizational Structure



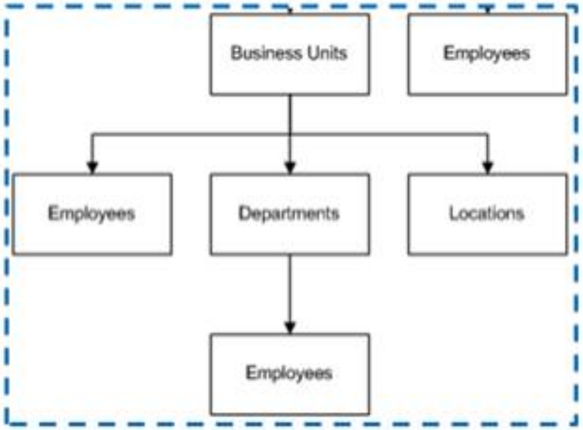
Company Profile Management (2/6)

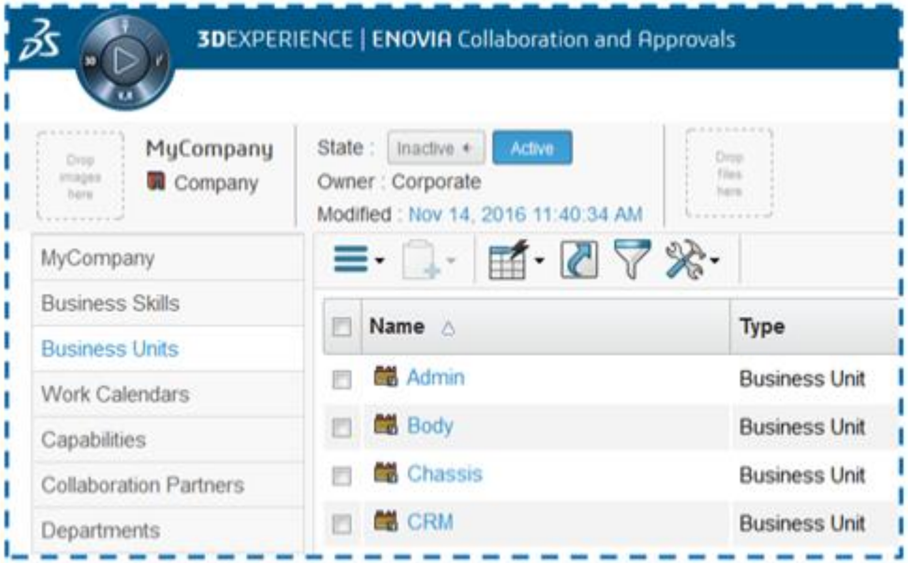
B. Business Units

A business unit is a sub unit of the parent company. A company can have more than one business unit.

The **Business Units** page lets you manage the business units for the company.

To access this page; in the company's category tree, select **Business Units**.



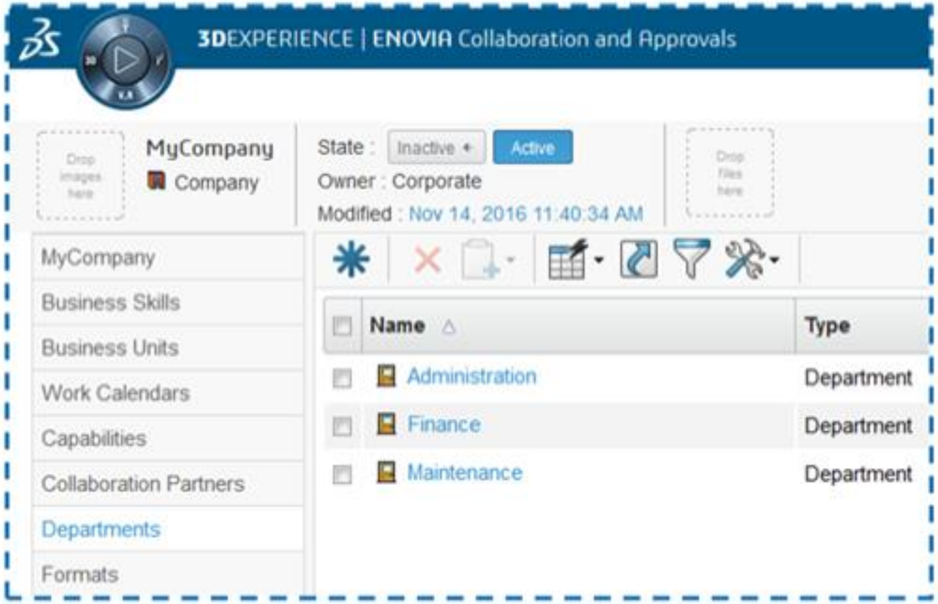


Company Profile Management (3/6)

C. **Departments**
A Department is a sub unit of a business unit.

The **Departments** page lists the basic information about departments for the selected company, or business unit. This page provides access to specific department details. In addition, a department may contain another level of departments (sub-departments).

To access this page; in the company's category tree, select **Departments**.

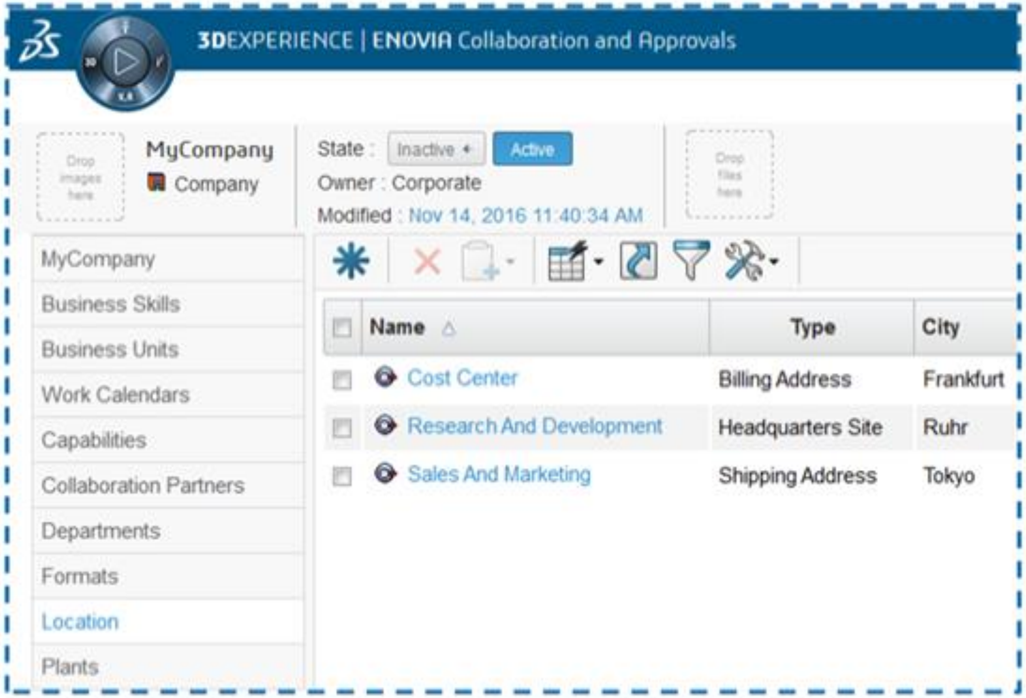


Company Profile Management (4/6)

D. **Location**:
Location is a physical address of the company. There are four types of locations: Headquarters Site, Manufacturing Site, Billing Address, and Shipping Address.

The **Location** page helps you to manage the locations for the company, subsidiary or business unit.

To access this page; in the company's category tree, select **Location**.



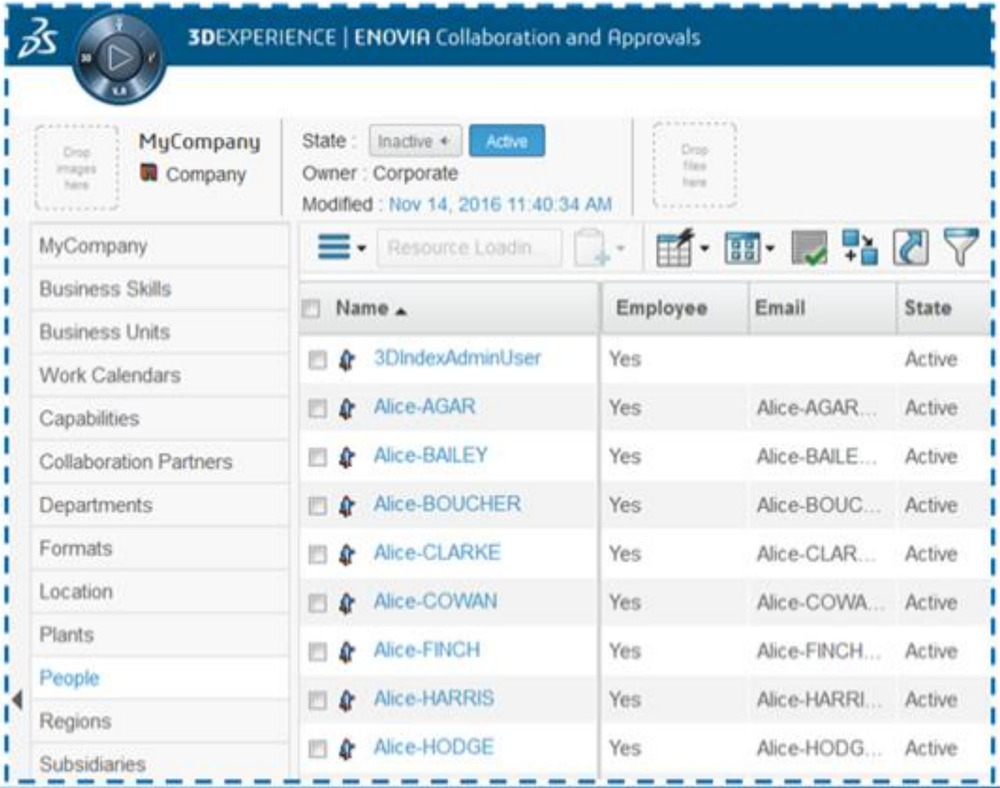
Company Profile Management (5/6)

E. People

People are the employees who work in the company. They may be associated at the company level, or may be assigned to a specific business unit.

The **People** page lists the people in a company, business unit, or department.

To access the page; in the company's category tree, select **People**.



Appendix

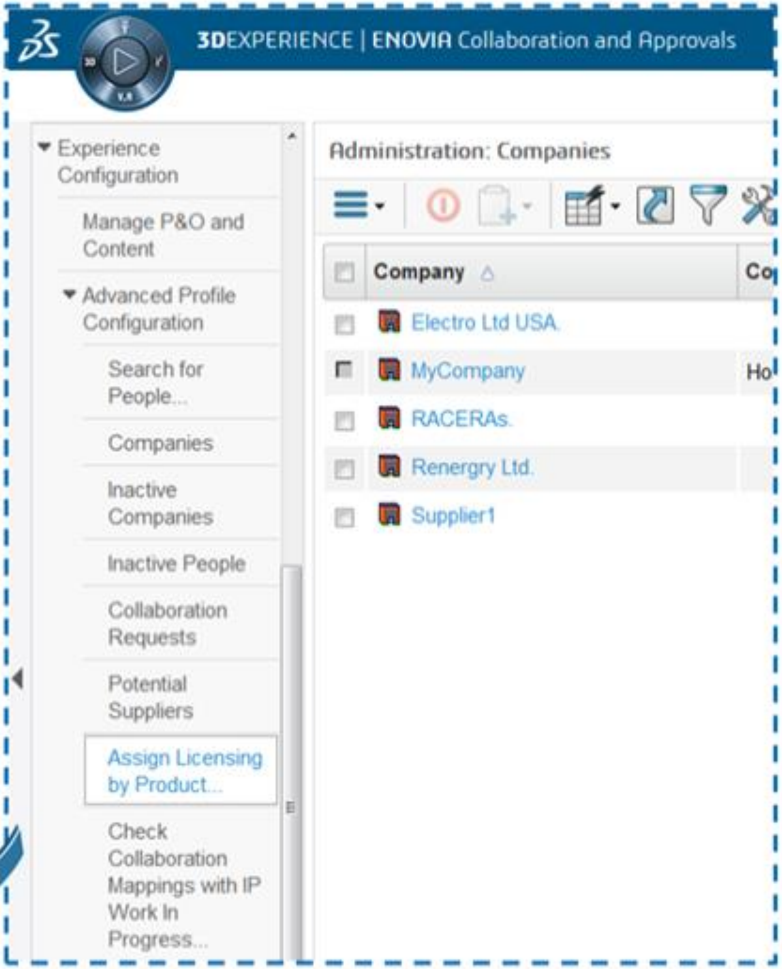
Company Profile Management (6/6)

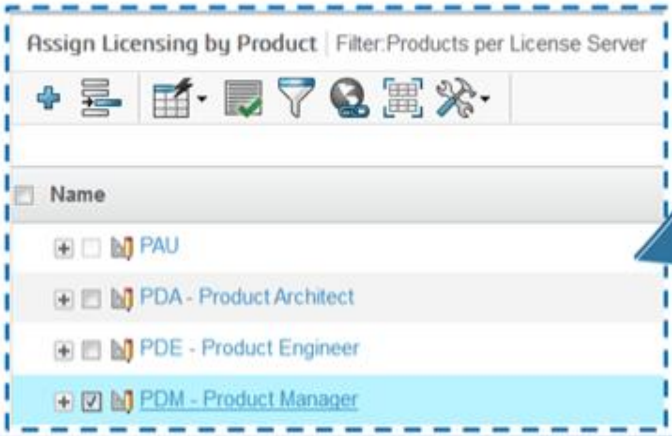
F. **Assigning the Licenses**: Every app has a license that to be assigned to the users. The licenses allow users to use the apps.

Users can view the number of licenses available in the product.

To view the licenses; in the **My Desk** menu, select **Collaborations and Approvals > Experience Configuration > Advanced Profile Configuration > Assign Licensing by Product….**

You can view the number of people assigned to a license.



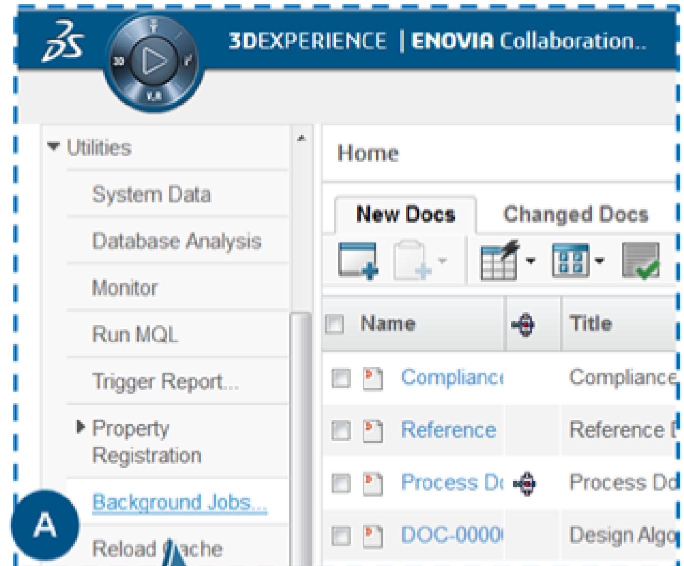


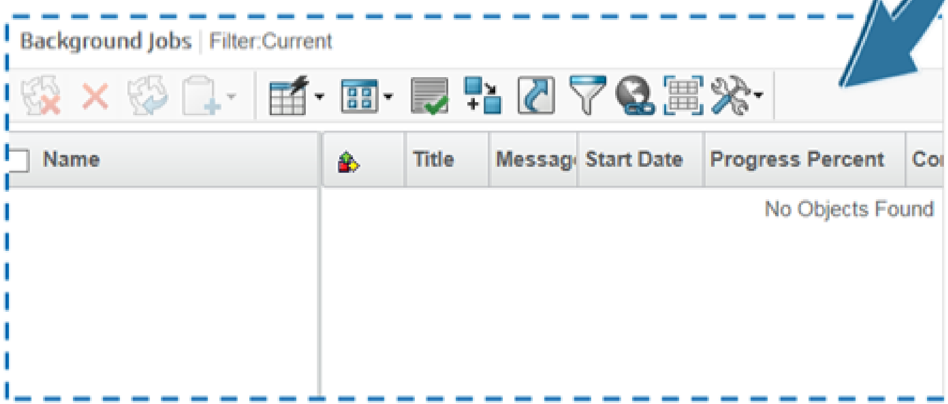
Utilities (1/2)

A. Background Jobs

Background jobs allow you to view the list of jobs (for example, exports and imports) that you initiate. You can check the status of jobs and take further action on jobs that are running or completed.

You can view the list of Background jobs using **Collaboration and Approvals > Utilities > Background Jobs....**

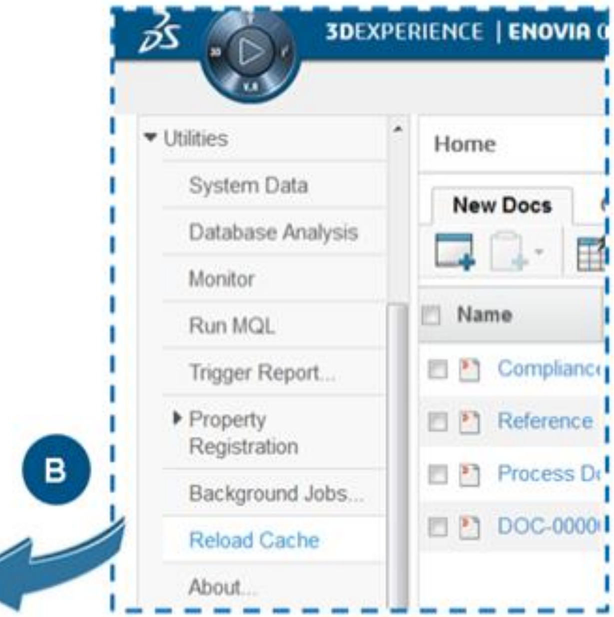




Appendix

Utilities (2/2)

B. **Reload Cache**: The objects modified (by an administrator) inside the Business Modeler or the Matrix Navigator are visible in the user interface only after reloading the cache.
To reload the cache; in the **My Desk** menu, select **Collaboration and Approvals > Utilities > Reload Cache**.



C. **Run MQL**: MQL stands for Matrix Query Language. You can run MQL to do the administrative activities (such as creating or modifying an object) through the ENOVIA UI itself.
To run MQL:

i. In the My Desk menu, select **Collaboration and Approvals > Utilities > Run MQL**.

ii. Enter the query in the MQL Command box.

iii. Click **Run**