

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 **3DEXPERIENCE 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 **3DEXPERIENCE** 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)

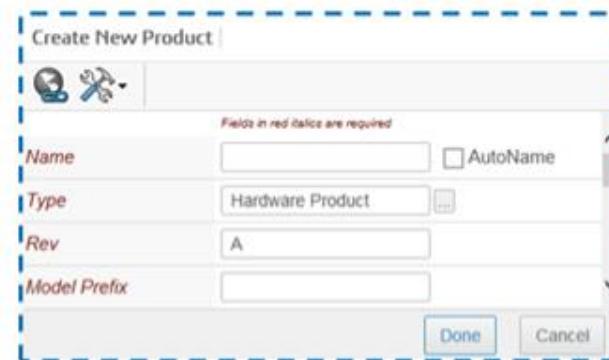
The following typographic conventions are used in this course:

- ▶ **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.



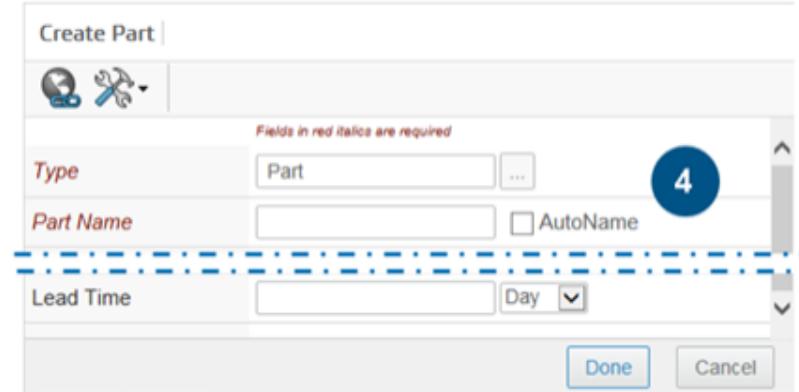
- b. Type [New] as the **Model Prefix**.
- c. Click **Done**.
3. Press <Ctrl> + <S> to save the document.

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.

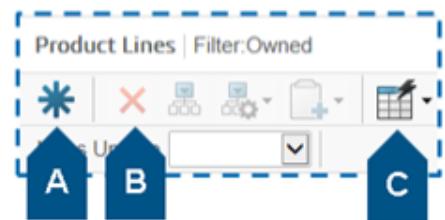
Examples:

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



You perform the following operations:

- A. Create
- B. Delete
- C. Customize



Creating a Change Request (2/2)



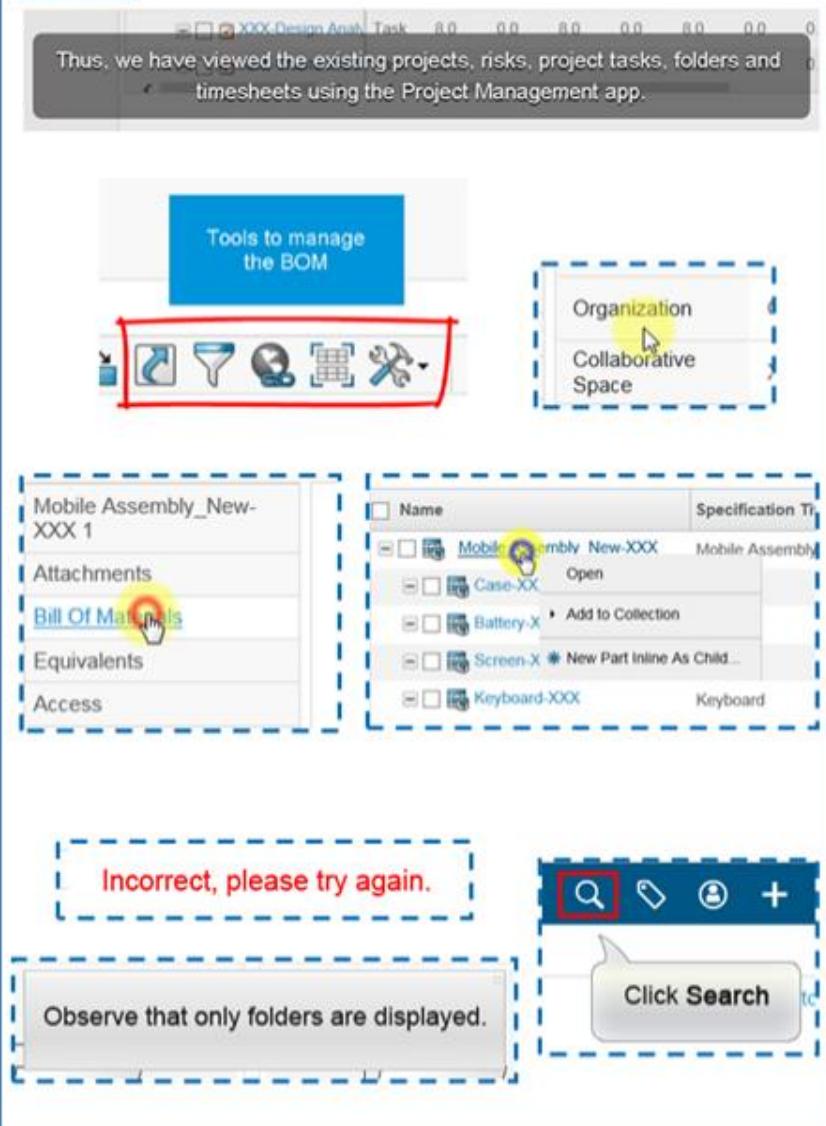
Conventions Used in the Course (3/3)

- ▶ 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.

Example:



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

The screenshot shows the 3DEXPERIENCE | ENOVIA Collaboration and Approvals application. The top navigation bar includes the 3DEXPERIENCE logo, a play button icon, and the title "3DEXPERIENCE | ENOVIA Collaboration and Approvals". The left sidebar menu contains the following items:

- Change Management
 - My Changes
- Collaboration and Approvals
 - Home
 - Issues Summary
 - Shortcuts...
 - Collections
- Utilities
- Routes
- Tasks
- Subscriptions

The main content area is titled "Home" and features a "New Docs" section with various document creation icons. Below this is a table listing documents, with one entry visible:

Name	Title	Action
3D Mercha	/home/data/RTV/3DE...	

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.

The screenshot displays the 3DEXPERIENCE | ENOVIA Collaboration and Approvals application. The interface is organized into several sections:

- Header:** Features the 3DEXPERIENCE logo, the title "3DEXPERIENCE | ENOVIA Collaboration and Approvals", and a set of global navigation icons (Search, Refresh, User, Plus, Home, Help).
- Left Navigation Panel:** A vertical sidebar with a blue rounded rectangle highlighting the "Collaboration and Approvals" section under "Change Management". Other sections include "Home", "Issues Summary", "Shortcuts...", "Collections", "Utilities", "Routes", "Tasks", "Subscriptions", "Meetings", "Decisions", "Discussions", "Metrics", "Member Lists", "View My Company", "Experience Configuration", "Team", "My View", "Workspaces", "Workspace Templates", and "Parameters".
- Central Dashboard:** This area contains:
 - A "New Docs" tab and a grid of document cards. One card is visible: "DOC-0000" titled "Design Algorithm-XXX".
 - A "Changed Docs" tab and a grid of document cards. One card is visible: "Reference" titled "Reference Document-...".
 - A "My Recent Docs" tab and a grid of document cards. One card is visible: "3D Mercha" with the path "/home/data/RTV/3DEx...".
- Right Side Panel:** Contains:
 - "Assigned Items": Shows 0 locked documents and 2 updates in 24h.
 - "Updates of documents over time": A chart showing document updates from Nov 12 to Nov 16. The chart shows a steady increase from 1 update on Nov 12 to 2 updates on Nov 16.
 - Summary statistics: 2 New this week, 3 New this month, 0 Modified this week, 0 Modified this month.

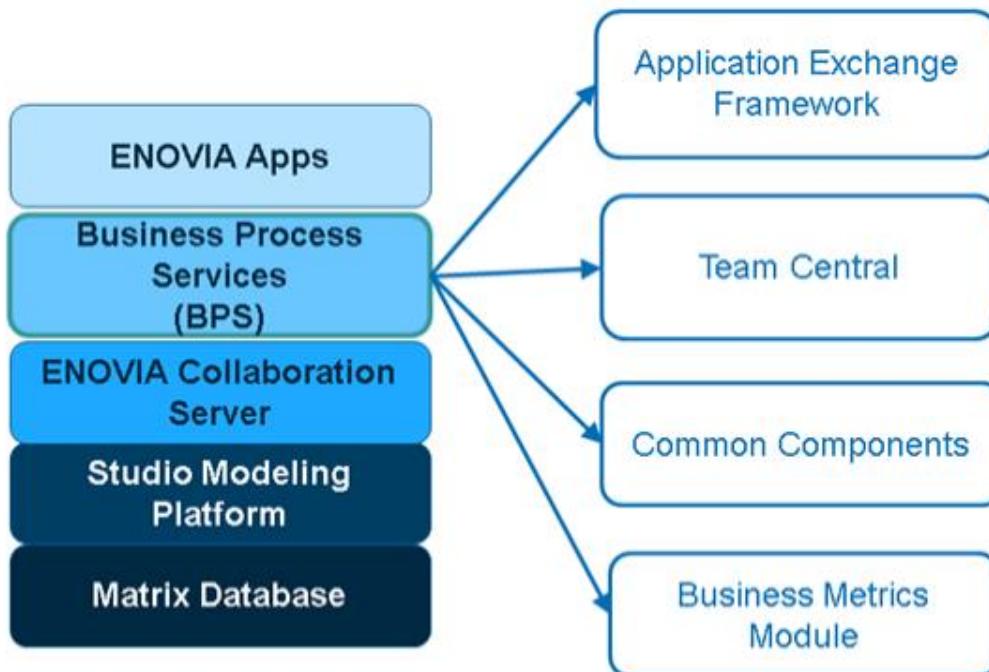
Defining Business Process Services

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 **3DEXPERIENCE** 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.

The screenshot shows the 3DEXPERIENCE | ENOVIA Collaboration.. interface. At the top, there's a navigation bar with a play button icon and the text "3DEXPERIENCE | ENOVIA Collaboration..". Below the navigation bar is a sidebar on the left containing a tree view of components: "Collaboration and Approvals" (expanded), "Home", "Issues Summary", "Shortcuts...", "Collections", "Utilities", "Routes", "Tasks", "Subscriptions", "Meetings", "Decisions", "My Calendar", "Discussions", "Metrics", and "Member Lists". To the right of the sidebar is the main content area titled "Home". It features two buttons: "New Docs" and "Changed Docs". Below these buttons is a table with columns for "Name", "Title", and file icons. The table lists several documents: "-ImportedA:", "-ImportedAs:", "-ImportedAs:", "-ImportedAs:", "-M34PredP", "-M34PredP", "-M34PredP", "-M34PredP", "RFLP-4129", "DOC-00001", and "station.log:". The last row shows "station.log:" and "station.log".

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

The screenshot shows the 3DEXPERIENCE | ENOVIA Collaboration and Approvals application. At the top is a navigation bar with icons for search, refresh, security, and help. On the left is a sidebar with a tree view of available modules: Change Management (My Changes), Collaboration and Approvals (Home, Issues Summary, Shortcuts..., Collections), and Utilities. The main area is titled "Home" and contains tabs for "New Docs", "Changed Docs", and "My Recent Docs". Below these tabs is a grid of document cards. One card for "DOC-0000" is visible, titled "Design Algorithm-XXX". Another card for "Reference" is also visible. To the right of the main content area are two panels: "Assigned Items" (showing 0 items) and "Updates of documents over time" (showing 2 updates in 24h). The overall interface is clean and modern, utilizing the AEF framework for its layout and components.

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 3DEXPERIENCE 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

The screenshot shows the 3DEXPERIENCE | ENOVIA Collaboration and Approvals application. A vertical sidebar on the left contains a navigation menu with several items under the 'Collaboration and Approvals' section, which is highlighted with a blue border. The main area displays a 'Home' dashboard with sections for 'New Docs', 'Changed Docs', and 'My Recent Docs'. It also includes a table of documents, a summary of 'Assigned Items' (0), and a chart showing 'Updates of documents over time' from Nov 12 to Nov 16. The bottom of the screen has a footer bar with various icons.

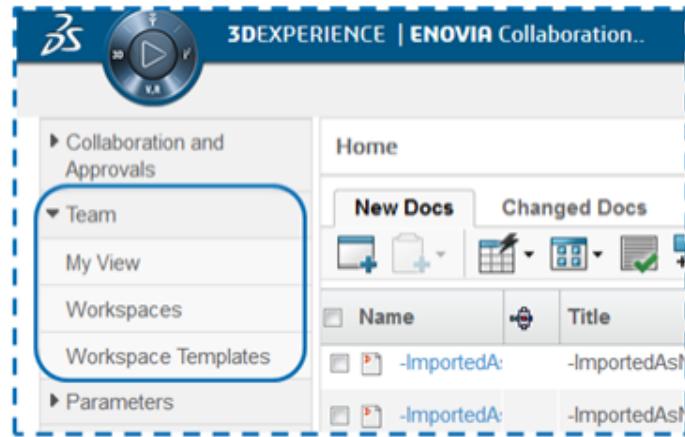
Menus and commands specific to the Common Components

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:

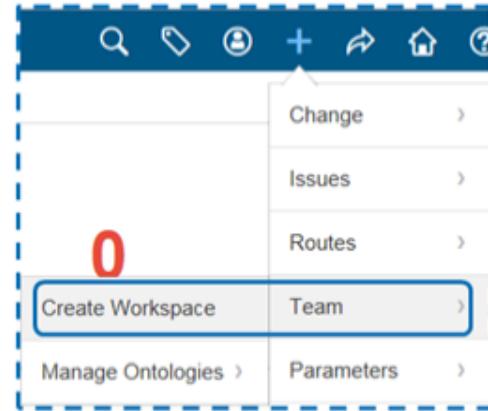
► **Collaboration and Approvals menu**

- Team



► **Add menu**

- Team > Create Workspace



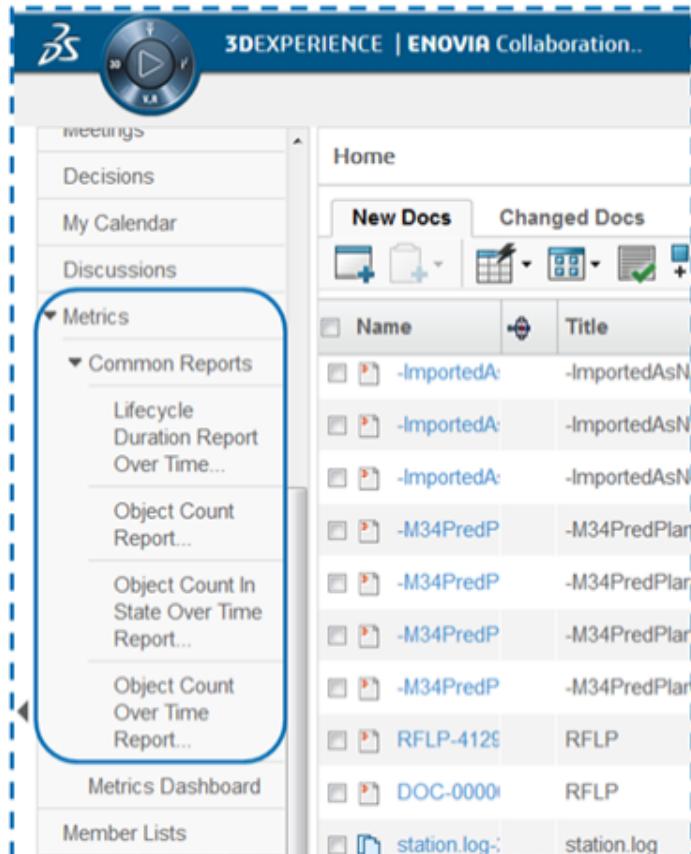
Menu and commands specific to Team Central

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:

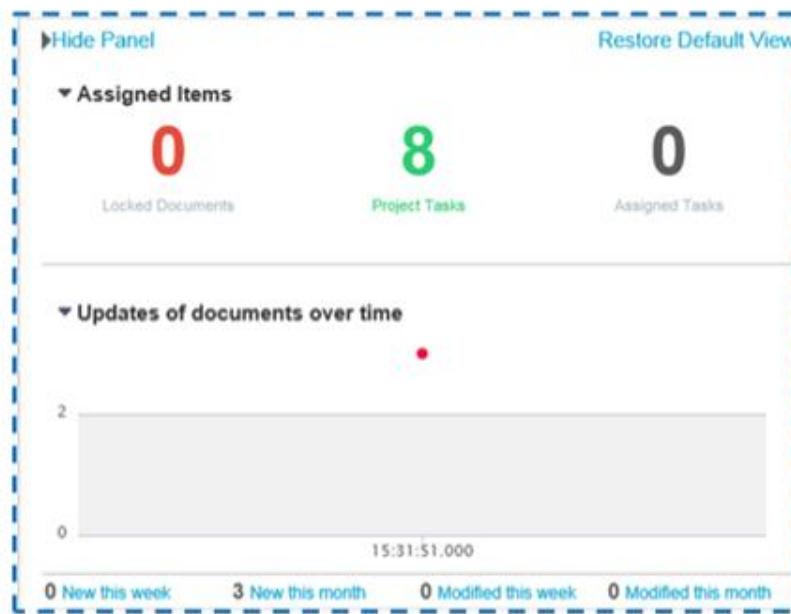
- ▶ Click **Hide Panel** or **Restore Default View** to hide or show the panel.
- ▶ Hover the mouse over the parts of a chart to view the details about that item.
- ▶ Click a counter, date period, or data in a chart to update the list to show items matching that counter or attribute.

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:

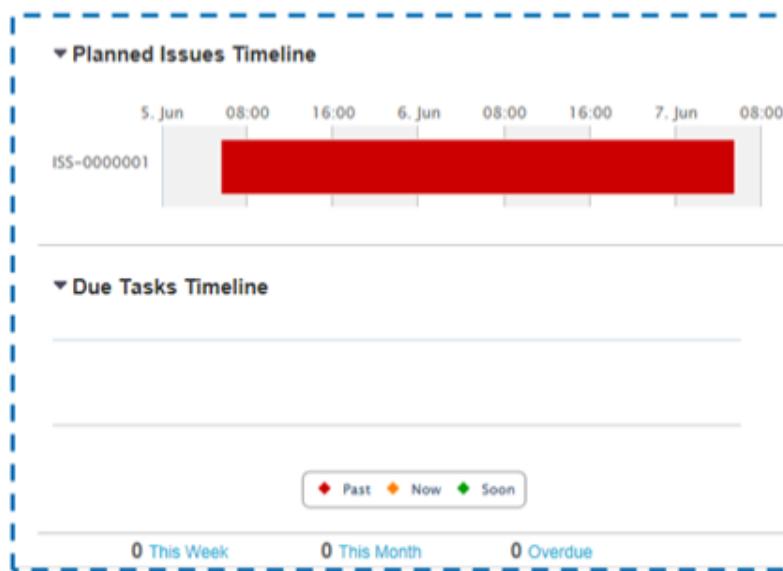
This section displays the in-process issues assigned to the user shown on a timeline.

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

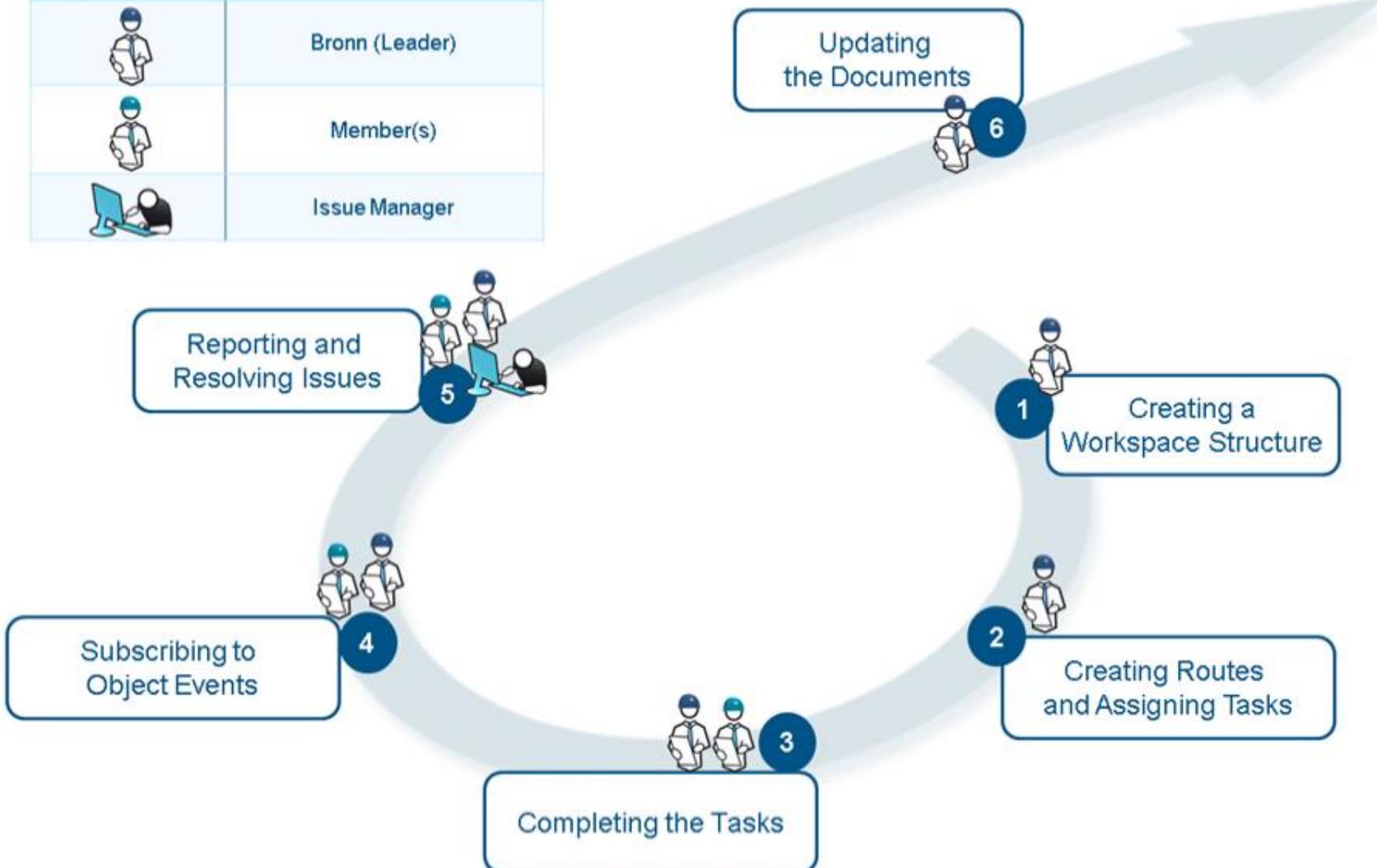
Accidents due to roof fall in underground mines has been a major concern for the coal mining industries. Our company, CoalMiners Co. is taking various initiatives, and *Mine Planning* has come out to be a solution to combat this problem.

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

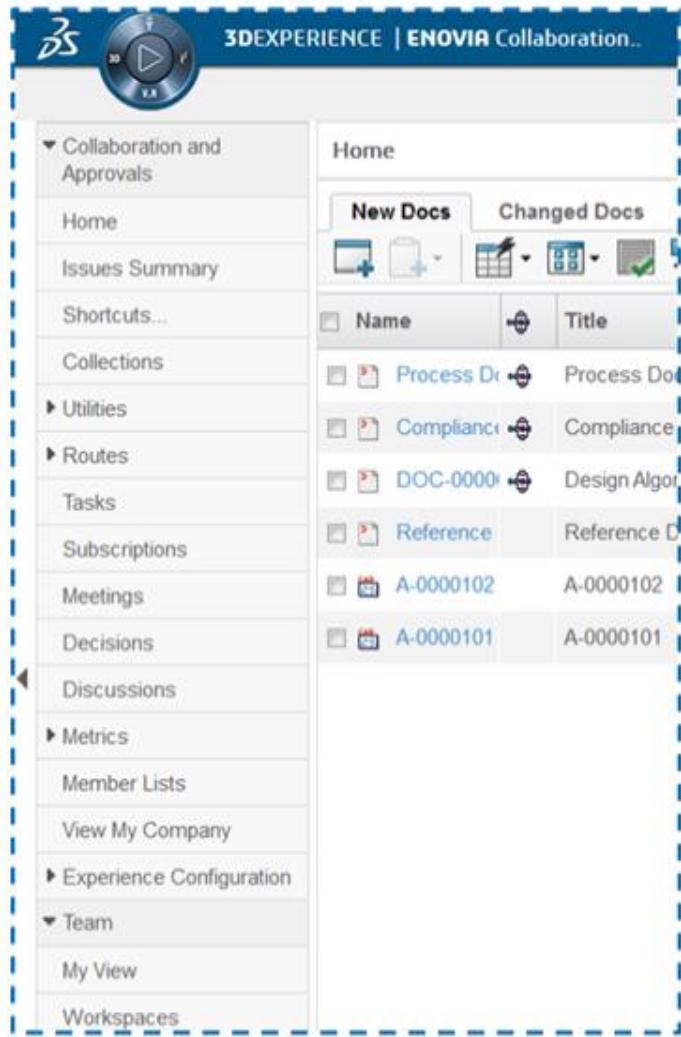
This table will help you to map the terminology of the **ENOVIA Collaboration and Approvals** app with the explanations in the course scenario.

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

The screenshot shows the ENOVIA Collaboration and Approvals App interface. At the top, there is a toolbar with various icons. Below it is a table with columns for Name and Description. Two entries are listed: 'Apparels' and 'Data Analysis-XXX'. The 'Data Analysis-XXX' entry has a detailed view below it, showing its name, description, owner (Williams Mark), and modification date (Nov 16, 2016 4:57:55 PM). A sidebar on the left lists categories like Folders, Tasks, Meetings, etc.

Name	Description
Apparels	Apparels
Data Analysis-XXX	Workspace for data analysis

Data Analysis-XXX

Workspace for data analysis
Owner : Williams Mark
Modified : Nov 16, 2016 4:57:55 PM

Organization	Collaborative Space/User	Access
	Alice Fey	Read Write
	Anne Taylor	Read Write
	Glover Bronn	Add Remove
	Williams Mark	Full
MyCompany	XXX-PrivateCS	All

Folders

- Tasks
- Meetings
- Issues
- Discussions
- Routes
- Subscriptions
- Properties
- Multiple Ownership Access

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

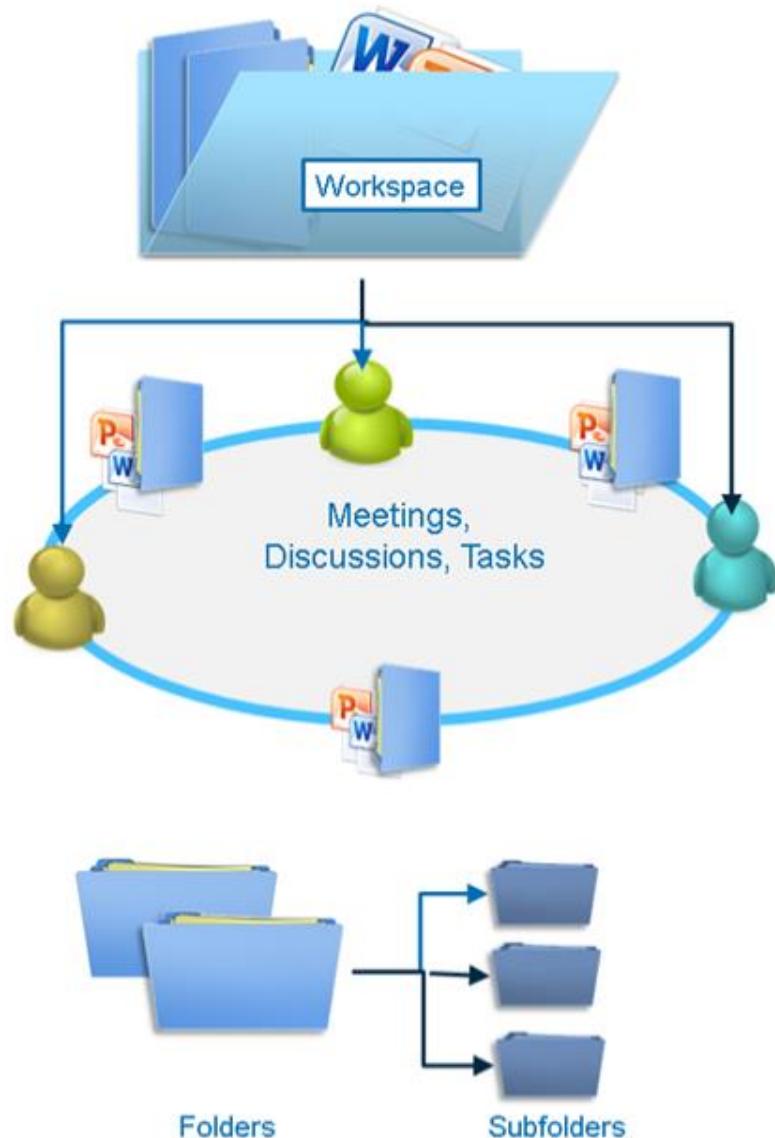
About Workspaces (1/3)

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.

The screenshot shows a workspace titled "Data Analysis-XXX" which is a "Workspace for data analysis". The workspace is owned by "Williams Mark" and was modified on "Nov 16, 2016 4:57:55 PM". The interface includes a sidebar with options like Folders, Tasks, Meetings, Issues, Discussions, Routes, Subscriptions, Properties, and Multiple Ownership Access. The main area displays a list of members and their access levels:

Organization	Collaborative Space/User	Access
	Alice Fey	Read Write
	Anne Taylor	Read Write
	Glover Bronn	Add Remove
	Williams Mark	Full
MyCompany	XXX-PrivateCS	All

► Meetings

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

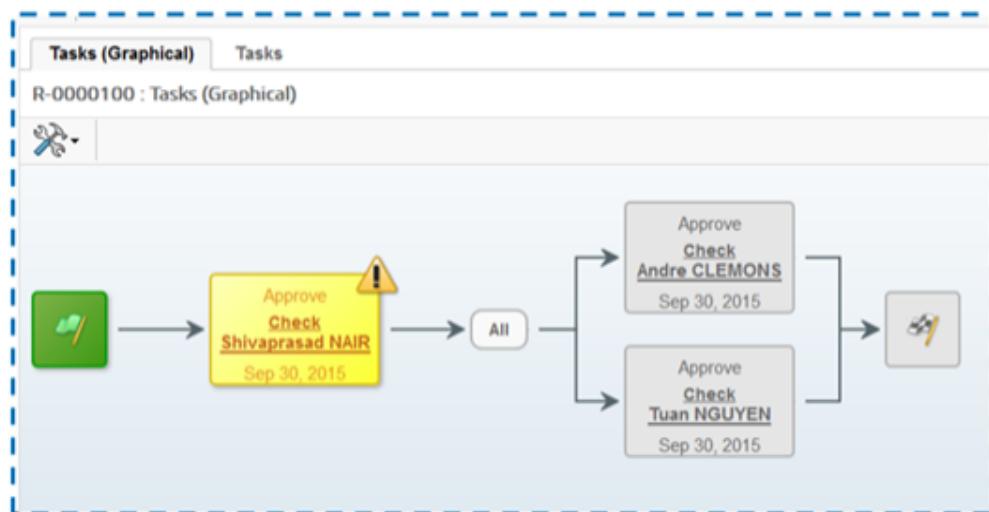
The screenshot shows a workspace titled "Data Analysis-XXX" which is a "Workspace for data analysis". The workspace is owned by "Williams Mark" and was modified on "Nov 16, 2016 4:57:55 PM". The interface includes a sidebar with options like Folders, Tasks, Meetings, Issues, and Discussions. The main area displays a list of meetings and agenda items:

Name	Relationship	Type	Owner
Knowledge Transfer Session-XXX	Mee...	Willian...	
Application of Data Analysis-XXX	Agenda Item		
Anne-XXX	Meeting Att...	Pers...	Anne T...
Bronn-XXX	Meeting Att...	Pers...	Glover...

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.

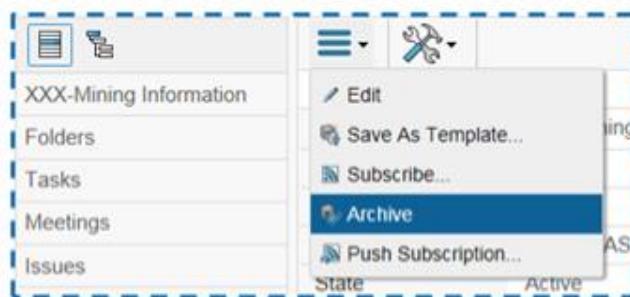


Listing the Workspaces

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.



A screenshot of the SIMULIA software interface showing the 'Workspaces' list. The list includes:

Name	Description	State	Owner
J75	folder	Create	Shanavaz KHAN
SIMULIA Samples	Workspace created by SIMULIA for s...	Active	SLM Installer
XXX-Mining Information	XXX-Mining Information	Create	Shanavaz KHAN

A large blue arrow points from the 'Archive' menu item in the first screenshot to the 'Active' state of the 'XXX-Mining Information' workspace in the second screenshot.

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.

The screenshot shows the workspace details interface. On the left, there is a sidebar with a 'Drop images here' placeholder and a list of categories: Folders, Tasks, Meetings, Issues, Discussions, Routes, Subscriptions, Properties, and Multiple Ownership Access. A blue arrow points from this sidebar to the main workspace details area. The main area displays the workspace name 'Data Analysis-XXX' and its description 'Workspace for Data Analysis'. It includes a toolbar with various icons and a table for managing workspace details. Below this, a structure tree shows the folder hierarchy: 'Data Analysis-XXX' contains 'Charting_Concepts-XXX', 'Design_Analysis_Algorithm-XXX', and 'Process_Checklist-XXX'.

The screenshot shows the workspace details interface. On the left, there is a sidebar with a 'Drop images here' placeholder and a list of categories: Collaboration and Approvals, Team, My View, Workspaces, Workspace Templates, and Parameters. A blue arrow points from this sidebar to the main workspace details area. The main area displays a list of workspaces under 'Workspaces'. One workspace, 'Data Analysis-XXX', is selected and highlighted with a blue border. The right side of the screen shows a detailed view of the selected workspace, including its state (Assign +), owner (Mark-XX), and last modified date (4/18/20). It also shows a toolbar and a table for managing workspace details.

The screenshot shows the workspace details interface. On the left, there is a sidebar with a 'Drop images here' placeholder and a list of categories: Folders, Tasks, Meetings, Issues, Discussions, Routes, Subscriptions, Properties, and Multiple Ownership Access. A blue arrow points from this sidebar to the main workspace details area. The main area displays the workspace name 'Data Analysis-XXX' and its description 'Workspace for Data Analysis'. It includes a toolbar with various icons and a table for managing workspace details. Below this, a structure tree shows the folder hierarchy: 'Data Analysis-XXX' contains 'Charting_Concepts-XXX', 'Design_Analysis_Algorithm-XXX', and 'Process_Checklist-XXX'. The right side of the screen shows a detailed view of the selected workspace, including its state (Assign +), owner (Mark-XX), and last modified date (4/18/20). It also shows a toolbar and a table for managing workspace details.

Creating Workspaces

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

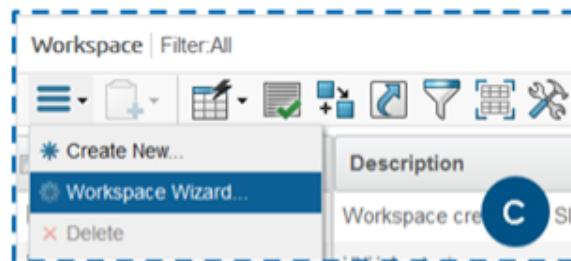
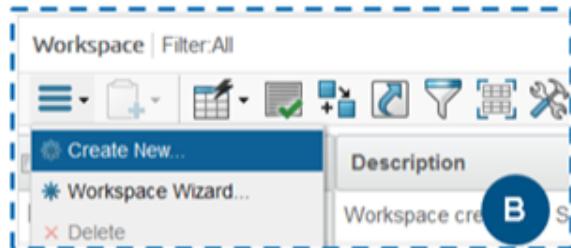
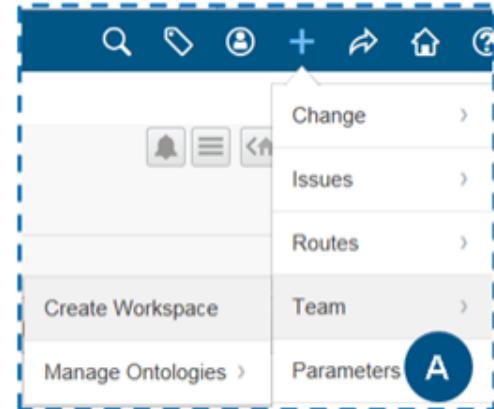
- ▶ Reassign the ownership to other members
- ▶ Assign folder accesses to the members
- ▶ Archive and reactivate the workspace, edit its properties and push subscriptions for it

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.

Step 4 of 4: Specify Access

The screenshot shows a table titled "Collaborative Space/User" with columns for Organization, Collaborative Space/User, Access, and In. There are two rows: one for "Mark Williams" with "Full" access and another for "XXX-PrivateCS" with "All" access. A toolbar above the table includes icons for adding security, deleting, editing, filtering, and navigating. A message at the bottom says "2 objects". A "Submit" button is at the bottom right.

Step 3 of 4: Create Subfolders

The screenshot shows a tree view of folders under "XXX-Design": "XXX-Design" (selected) and "XXX-Abstract". A toolbar above the tree includes "Create New" and "Remove Selected" buttons. A message at the bottom says "1 object". A "Next" button is at the bottom right.

Step 1 of 4: Specify Details

The screenshot shows workspace details: Name (XXX-Apparel Design), Template (XXX-Template), Buyer Desk (Buyer Desk), and Description (Apparel Design and manufacturing details). A "Next" button is at the bottom right.

Step 2 of 4: Create Top-Level Folders

The screenshot shows a list of top-level folders: "XXX-Design" (selected) with a description "Apparels Design". A toolbar above the list includes "Create New" and "Remove Selected" buttons. A message at the bottom says "1 object". A "Next" button is at the bottom right.

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

Creating Folders

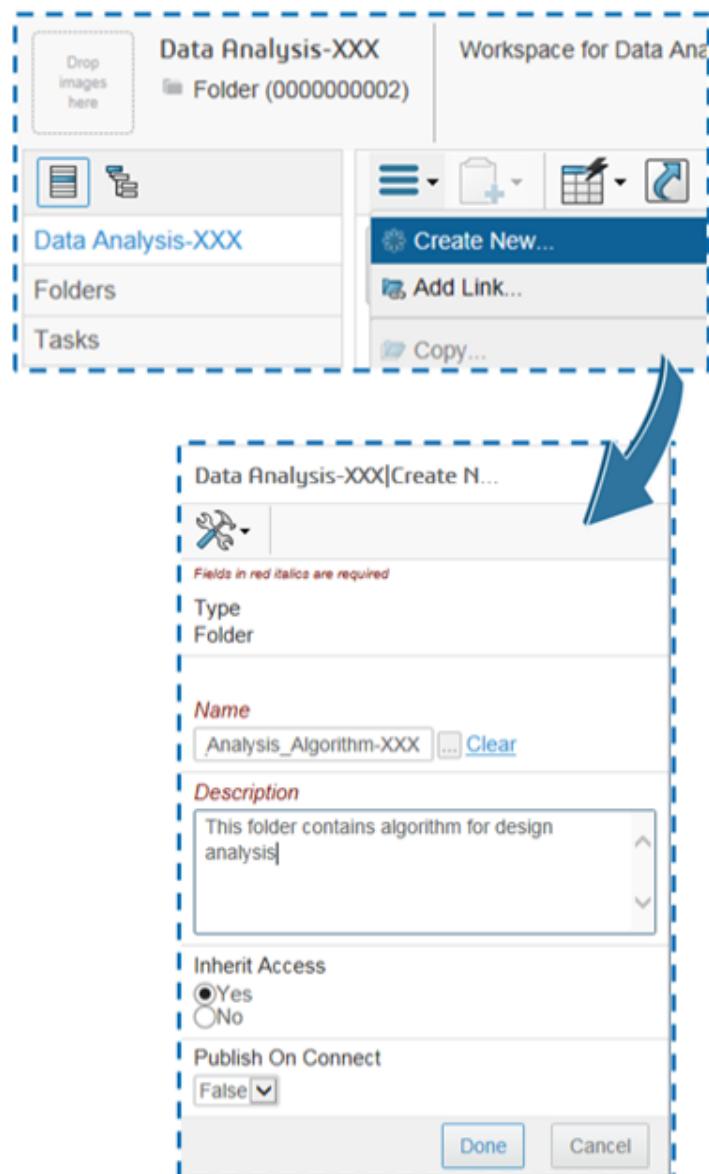
You can create new folders using the **Actions** menu on a workspace's **Folders** page. You can also create sub-folders within a folder to further group the documents.

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.

The screenshot shows a user interface for managing folder access. On the left, there's a sidebar with links like Data Analysis-XXX, Folders, Tasks, Meetings, Issues, Discussions, Routes, Subscriptions, Properties, and Multiple Ownership Access. The main area has a title bar with icons for Add Security Co..., Delete, Edit, Filter, and More. Below this is a table with three columns: Organization, Collaborative Space/User, and Access. The table lists five entries: Alice Fey (ReadWrite), Anne Taylor (ReadWrite), Bronn Glover (Add Remove), Mark Williams (Full), and Company Name (All). A dashed blue border surrounds the entire interface.

Organization	Collaborative Space/User	Access
	Alice Fey	ReadWrite
	Anne Taylor	ReadWrite
	Bronn Glover	Add Remove
	Mark Williams	Full
Company Name	XXX-PrivateCS	All

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

The screenshot shows the 3DEXPERIENCE | ENOVIA Collaboration and Approvals application. The left sidebar contains navigation links for Change Management (My Changes), Collaboration and Approvals (Home, Issues Summary, Shortcuts..., Collections, Utilities), and Utilities. The main area is titled "Workspace Templates" and displays a table with the following data:

Name	Revision	Description	Availability	Owner
Template_001-XXX	1	Workspace Template	User	Williams Mark

The table includes icons for each row and column header. The "Availability" column indicates that the template is only available to the user who created it.

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.

The screenshot shows two views of a workspace template named 'Template_001-XXX'. On the left, a summary card displays the template's name, state ('Exists'), owner ('Williams Mark'), and modification date ('Nov 16, 2016 4:57'). Below this is a detailed table with columns for Name, Revision, Owner, Originated, Description, and Availability. On the right, a 'Workspace Templates' list shows the same template entry. A large blue arrow points from the template name in the summary card to the 'Properties' page on the right.

Template_001-XXX		Workspace Template	State : Exists	
Drop Images here	Workspace Template...		Owner : Williams Mark	Modified : Nov 16, 2016 4:57
Template_001-XXX			Name	Template_001-XXX
Folders		Revision	Revision	1
Multiple Ownership Access		Owner	Owner	Williams Mark
		Originated	Originated	16-Nov-2016
		Description	Description	Workspace Template
		Availability	Availability	User

Name	Revisor	Description
Template_001-XXX	1	Workspace 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.

The screenshot shows the 'Folders' page for the workspace template 'Template_001-XXX'. It displays a list of three folder entries: 'Charting_Concepts-XXX', 'Design_Analysis_Algorithm-XXX', and 'Process_Checklist-XXX'. Each entry is represented by a small folder icon and a folder name.

Template_001-XXX	Workspace Template	State : Exists	
Drop Images here	Workspace Template...	Owner : Williams Mark	Modified : Nov 16, 2016 4:57
Template_001-XXX			Name
Folders			Charting_Concepts-XXX
Revision			Design_Analysis_Algorithm-XXX
Multiple Ownership Access			Process_Checklist-XXX

Viewing the Workspace Template Details (2/2)

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

This screenshot shows the 'Revision' page for a workspace template named 'Template_001-XXX'. The top right corner displays the template's state as 'Exists', owner as 'Williams Mark', and modification date as 'Nov 16, 2016 4:57:55 PM'. Below this, there are buttons for 'Revision Histor...', a calendar icon, a funnel icon, and a wrench icon. A table below lists the revision details:

Name	Rev	Description
Template_001-XXX	1	Workspace Temp

- 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.

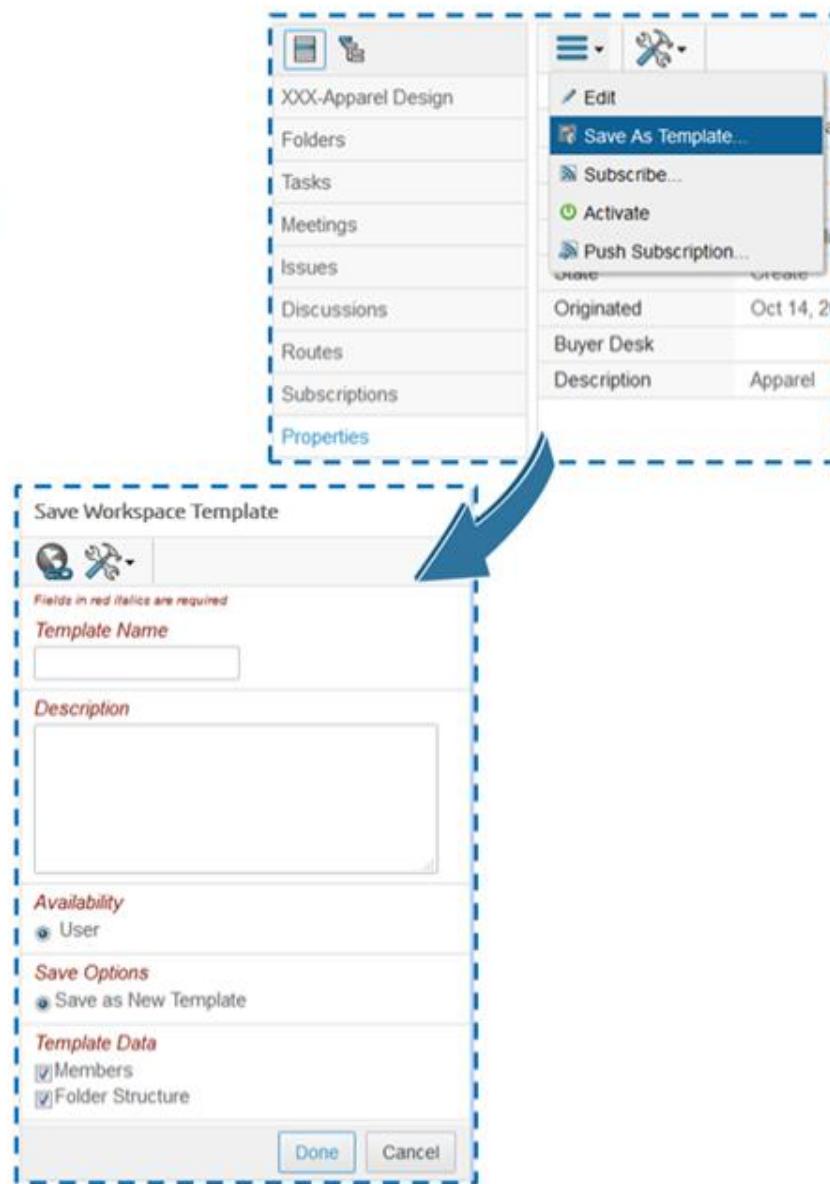
This screenshot shows the 'Multiple Ownership Access' page for the same workspace template. The top right corner shows the state as 'Exists', owner as 'Williams Mark', and modification date as 'Nov 16, 2016 4:57:55 PM'. Below this, there are icons for adding a user, organization settings, and deleting a user. A table lists the access details:

Organization	Collaborative Space/User	Access
	Alice Fey	Read Write
	Taylor Anne	Read Write
	Glover Bronn	Add Remove
	Williams Mark	Full
MyCompany	XXX-PrivateCS	All

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.

The screenshot shows a workspace titled "Data Analysis-XXX" with a dashed blue border. Inside, there's a sidebar with categories: Data Analysis-XXX, Folders, Tasks, **Meetings** (highlighted with a blue arrow labeled 'A'), Issues, Discussions, Routes, Subscriptions, Properties, and Multiple Ownership Access. The main area displays meeting details for "Knowledge Transfer Session-XXX". A table lists five agenda items:

Name	Relationship	Type	Owner	State	Topic
Knowledge Transfer Session-XXX	Mee...	Williams Mark	Scheduled		Knowledge Transfer
Application of Data Analysis-XXX	Agenda Item		Scheduled		Data Analysis
Anne-XXX	Meeting Att...	Pers...	Anne Taylor	Active	
Bronn-XXX	Meeting Att...	Pers...	Glover Bronn	Active	
DEC-000001	Decision	Deci...	Williams Mark	Active	
Mark-XXX	Meeting Att...	Pers...	Williams Mark	Active	

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.

The screenshot shows the 'Meetings' interface within the 'Collaboration and Approvals' module. A blue arrow labeled 'B' points from the 'Meetings' item in the left sidebar to the 'Relationship' column in the main grid. The grid has columns for 'Name' and 'Relationship'. One row shows a meeting titled 'Knowledge Transfer Session-XXX' with a 'Meeting' icon. A large blue arrow points from this row to a detailed view of the meeting's properties on the right.

Name	Relationship
Knowledge Transfer Session-XXX	Meeting

Knowledge Transfer Session-XXX

Knowledge Transfer Session-XXX	Meeting
Agenda Items	Type
Attachments	Meeting Type
Attendees	Subject
Decisions	Meeting Location
Lifecycle	Context
History	Description
	Host

Meeting Properties:

- Knowledge Transfer Session-XXX
- Type: Meeting
- Meeting Type: None
- Subject: Knowledge Transfer Session-XXX
- Meeting Location:
- Context: Data Analysis-XXX
- Description: Knowledge Transfer Session for C...
- Host: Mark Williams

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.

The screenshot shows the 'Create Meeting' dialog box overlaid on a workspace interface. The workspace sidebar on the left lists 'Data Analysis-XXX', 'Folders', 'Tasks', 'Meetings' (which is bolded), 'Issues', and 'Discussions'. The main workspace area has a 'Name' column and a 'Relationships' column. A large blue arrow points from the top workspace area down to the 'Create Meeting' dialog box.

Data Analysis-XXX|Create Meet...

Fields in red italics are required

Name AutoName

Type Meeting

Meeting Type None

Subject

Meeting Location

Context
Data Analysis-XXX

Done **Cancel**

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.

The screenshot displays a software interface for managing meetings. At the top, a category tree shows 'Data Analysis-XXX' expanded, with 'Folders', 'Tasks', and 'Meetings' listed under it. A blue box highlights the 'Meetings' item. To the right is a toolbar with various icons for creating and modifying items. Below the category tree, a list shows a single meeting entry: 'Knowledge Transfer Session-XXX'. This entry is also highlighted with a blue box. A large blue arrow points from the category tree area down towards the detailed meeting properties dialog. The dialog itself is titled 'Knowledge Transfer Session-...' and contains the following details:

Knowledge Transfer Session-...	
Knowledge Transfer Session-XXX	
Meeting	
Knowledge Transfer Session-XXX	
Agenda Items	Type: Meeting
Attachments	Meeting Type: None
Attendees	Subject: Knowledge Transfer Session-XXX
Decisions	Meeting Location
Lifecycle	Context: Data Analysis-XXX
History	Description: Knowledge Transfer Session for Data Analysis
	Host: Mark Williams
	Meeting Date: Oct 1, 2015
	Start Time: 8:30:00 AM
	Duration in Minutes: 60.0

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.

The screenshot shows two windows related to agenda item creation. The top window is titled 'Knowledge Transfer Session-...' and displays a list of agenda items for a meeting. The bottom window is titled 'Create Agenda Item' and is used to add new agenda items.

Knowledge Transfer Session-...

Knowledge Transfer Session-XXX
Meeting

Agenda Items

Topic	Sequence Number	Responsible Person
Application of Data Analysis-XXX	1	Anne-XXX

Attachments
Attendees
Decisions
Lifecycle
History

Create Agenda Item

Fields in red italics are required

Topic: [Clear](#)

Topic Item(s): [Clear](#)

Responsible Person: [Clear](#)

Duration in Minutes:

Sequence Number: 2

Buttons: Done, Cancel

A large blue arrow points from the 'Create Agenda Item' dialog box towards the 'Agenda Items' list in the top window.

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.

The screenshot shows the 'Knowledge Transfer Session-XXX' page with a dashed blue border. At the top, there's a toolbar with icons for creating new items, saving, deleting, and filtering. Below the toolbar is a table with columns: Name, Work Phone Number, Email Address, and Company. Three rows are listed: Anne-XXX, Bronn-XXX, and Mark-XXX. A large blue arrow points from the 'Attendees' section of the main page down to this table.

Name	Work Phone Number	Email Address	Company
Anne-XXX		Anne-XXX@3...	Company N
Bronn-XXX		Bronn-XXX@...	Company N
Mark-XXX		Mark-XXX@3...	Company N

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.

The screenshot shows the 3DEXPERIENCE | ENOVIA Collaboration and Approvals application. The left sidebar contains a navigation menu with sections like Change Management, Collaboration and Approvals, Utilities, Routes, Tasks, Subscriptions, Meetings, Decisions (which is selected and highlighted), and Discussions. The main area is titled "Decisions | Filter:Owned". It features a toolbar with various icons for creating, deleting, filtering, and modifying decisions. A table lists a single decision entry:

Name	Reviser	Type	Description	Owner	State	Related Objects	Modified
DEC-000001	1	De...	All the attendees must be...	Williams Mark	Active	Knowledge Tran Nov 1	

About Decisions (2/2)

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

The screenshot shows a software application window with a title bar "Knowledge Transfer Session-XXX" and a subtitle "Knowledge Transfer Session for Data Analysis". The top right corner displays the state as "Scheduled", owner as "Williams Mark", and modification date as "Nov 16, 2016 4:25:05 PM". A "Drop files here" area is also visible.

The left sidebar contains a navigation tree with the following items:

- Meeting (selected)
- Knowledge Transfer Sessi...
- Agenda Items
- Attachments
- Attendees
- Decisions
- Lifecycle
- History

The main content area features a toolbar with various icons for file operations like create, save, print, and search. Below the toolbar is a table with the following columns: Name, Type, Revision, Title, FromContext, Description, and Owner. One decision item is listed:

Name	Type	Revision	Title	FromContext	Description	Owner
DEC-000001	De...	1	General D...	All the attendees must be ...	Willi...	

Adding Decisions (1/2)

There are two ways of adding decisions.

- 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).

The screenshot illustrates the process of creating a decision. On the left, a modal dialog titled 'Knowledge Transfer Session-XXX|Create' is displayed, containing fields for Type (Decision), Name, Vault (eService Production), Title, Description, Owner (Mark Williams), and Track Applicability (No). A blue arrow points from the 'Decisions' button in the dialog to the 'Decisions' section on the right. On the right, a list of decisions is shown under the heading 'Knowledge Transfer Session-XXX'. The list includes 'Knowledge Transfer Session-XXX' (Meeting), 'Knowledge Transfer Sessi...', 'Agenda Items', 'Attachments', 'Attendees', and 'Decisions'. The 'Decisions' section has a sub-menu with options: Create..., Add Existing..., Subscribe..., Recycle, Remove, and Delete. The 'Create...' option is highlighted with a blue background.

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.

The screenshot shows the Oracle APEX interface for managing decisions. At the top, a dashed box encloses the object navigation bar for 'Knowledge Transfer Session-XXX'. Below it, another dashed box encloses the 'Decisions' page. The 'Actions' menu is open, showing options like 'Create...', 'Add Existing...', 'Subscribe...', 'Remove', and 'Delete'. A large blue arrow points from the 'Add Existing...' option down to the 'Search Results' table. The table has columns for Name, Type, Revision, Title, and Description. It lists two items: 'XXX-Decision on material' and 'XXX-More sessions on Abstract'. The bottom right corner of the interface has 'Submit' and 'Close' buttons.

Name	Type	Revision	Title	Description
XXX-Decision on material	Decision	1	Decision on material	Decision on material version
XXX-More sessions on Abstract	Decision	1	More sessions on Abstract	More sessions on Abstract

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.

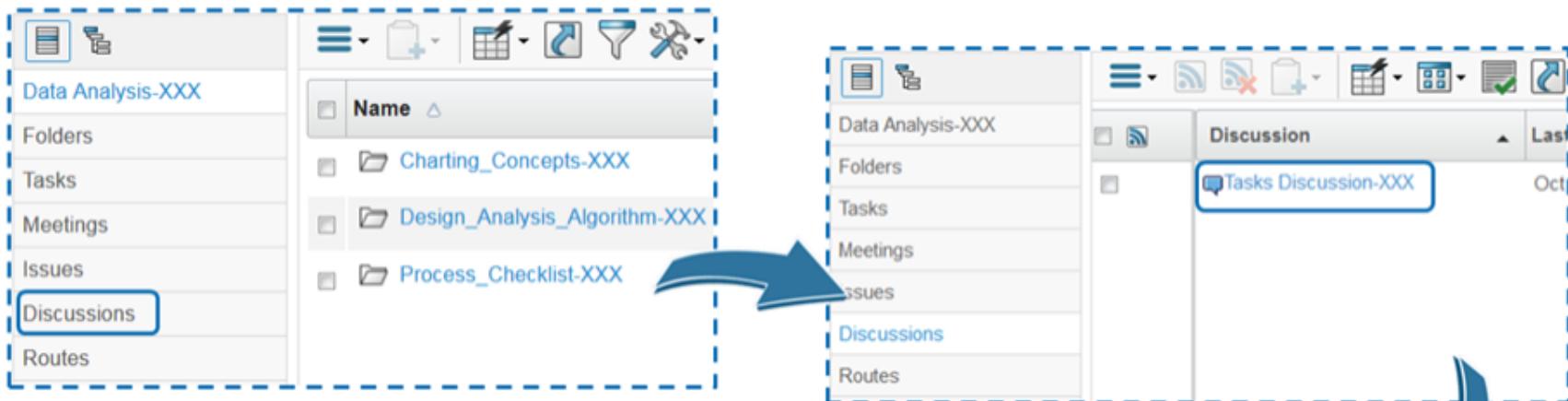
Use the filter on the page toolbar to select a filter option.

The screenshot shows the 'Discussions' section of the 3DEXPERIENCE platform. The sidebar on the left lists various collaboration options like Change Management, Collaboration and Approvals, and Discussions. The main area displays a table of discussions, with a single row visible: 'Tasks Discussion-XXX' posted on Oct 5, 2015, by Mark Williams, which is public. The page toolbar at the top includes icons for search, filters, and other collaboration tools. A blue arrow highlights the 'All from last 30 days' filter option in the sidebar's dropdown menu, which corresponds to the filter icon on the page toolbar.

This screenshot shows a detailed view of the 'Discussions' table. It has columns for Name, Type, and a header row with filters. The table contains one row for a discussion titled 'Tasks Discussion-XXX' posted by Mark Williams on Oct 5, 2015, which is public. The page toolbar at the top includes icons for search, filters, and other collaboration tools. A blue arrow highlights the 'All from last 30 days' filter icon on the page toolbar, which corresponds to the filter icon in the table header.

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.

This screenshot shows the "Tasks Discussion-XXX" Properties page. The top section displays the discussion details:

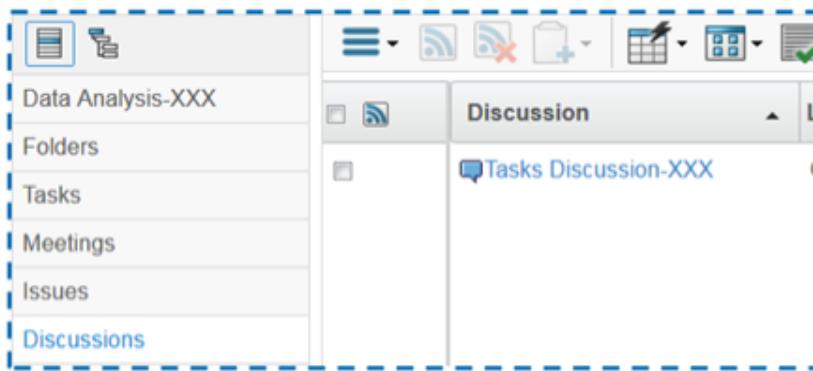
- Discussion ID: MSG-51444046788075
- Subject: Discussion on the tasks assigned to each member
- State: Inactive (button) → Active (button)
- Owner: Mark-XXX
- Modified: 10/5/2015 2:25:18 PM

The bottom section shows the discussion thread:

- Discussion:** Tasks Discussion-XXX : Properties | A discussion related to: Data Analysis-XXX
- Participants:** Mark Williams (Oct 5, 2015 6:36:28 PM)
Discussion on the tasks assigned to each member
Attachments
- Reply:** Re Tasks Discussion-XXX : Bronn Glover (Oct 5, 2015 6:55:18 PM)
I have a review task and an approval task this week
Attachments

Creating Discussions

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



The screenshot shows the 'Create Message' dialog box. It has sections for 'Type' (Message), 'Subject' (Tasks Discussion-XXX), 'Message' (Discussion on the tasks assigned to each member), and 'Visibility' (Public). At the bottom are 'Done' and 'Cancel' buttons. A large blue arrow points from the 'Discussions' page towards this dialog box.

Data Analysis-XXX
Folders
Tasks
Meetings
Issues
Discussions

Create Public Discussion...
Create Private Discussion...
Delete

Create Message

Type
Message

Subject
Tasks Discussion-XXX

Message
Discussion on the tasks assigned to each member

Visibility
Public

Done Cancel

Replying to a Discussion Thread

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

The diagram illustrates the process of replying to a discussion thread across three panels:

- Left Panel (Discussion History):** Shows a list of discussions with their titles, authors, and dates. The first item is "Tasks Discussion-XXX" by "Mark Williams" on "Oct 5, 2015 6:36:28 PM". Below it is a reply message from "Bronn Glover" on "Oct 5, 2015 6:55:18 PM" stating: "I have a review task and an approval task this week".
- Top Right Panel (Properties and Reply Form):** Shows the "Discussion Tasks Discussion-XXX : Properties" screen. It includes a "Reply" section with a "Reply" button, a note about required fields, and the original message content. The subject is set to "Re Tasks Discussion-X".
- Bottom Right Panel (Message Content):** Shows the message content being composed: "I have a review task and an approval task this week".

Blue arrows indicate the flow from the original message in the history to the reply form, and from the reply form to the message content.

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)

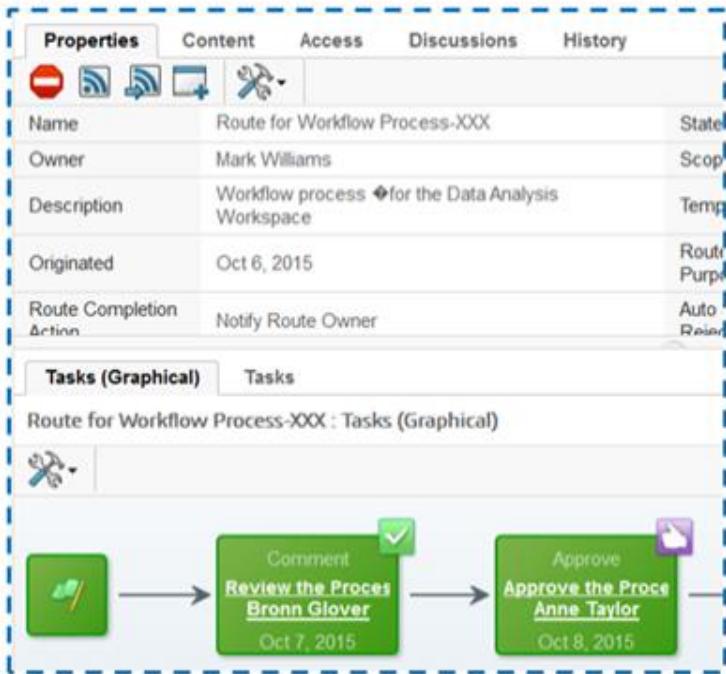
- ▶ A folder contains a set of documents and files related to a particular workspace. You can create sub-folders within a folder to further group the documents. Folders maintain a single lifecycle state called Exists.
- ▶ You can save and track decisions taken during a specific meeting or decisions taken 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.

The screenshot shows a workspace discussion interface. At the top, there's a message card for 'MSG-51444046788075' with a 'Message' button. Below it is a section for 'Tasks Discussion-XXX' with tabs for 'History' and 'Attachments'. To the right, a list of discussions is shown:

- Discussion Tasks Discussion-XXX : Properties** by **Mark Williams** on **Oct 12**.
Discussion on the tasks assigned to each member
@ Attachments
- Re Tasks Discussion-XXX** by **Bronn Glover** on **Oct 12**.
I have a review task and an approval task this week
@ Attachments

The screenshot shows a workspace management interface. At the top, there's a folder named 'Data Analysis-XXX' containing a 'Folder (0000000002)'. Below it is a navigation bar with icons for Home, Create, Search, Filter, Sort, and Refresh. To the right, workspace details are shown: State: Active, Owner: Mark-XXX, Modified: 4/18/2016 3:04:31 PM. Below this is a list of 'Knowledge Transfer Session-XXX' items with columns for Name, Relationship, Type, Owner, and State. The first item is 'Knowledge Transfer Session-XXX' by 'Mark Williams' with a 'Scheduled' status.

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.

Route for Workflow Process-XXX Workflow Process for the Data Analysis Workspace Owner : Mark-XXX
Route (0000000002) Modified : 4/19/2016 7:18:41 AM

Route for Workflow Proce... XXX-Private

Properties		Content	Access	Discussions	History
Name	Route for Workflow Process-XXX			State	Started
Owner	Mark Williams			Scope	Organization
Description	Workflow Process for the Data Analysis Workspace			Template	Standard Template-XXX
Originated	19 Apr, 2016			Route Base Purpose	Standard
Route Completion Action	Notify Route Owner			Auto Stop On Rejection	Immediate

Tasks (Graphical) Tasks

Route for Workflow Process-XXX : Tasks (Graphical)

```
graph LR; A(( )) --> B[Comment Review Process Do auto_91461042927 21 Apr, 2016]; B --> C[Approve Approve the Proc. Anne Taylor 21 Apr, 2016]; C --> D[Approve Approve the Workf. Bronn Glover 21 Apr, 2016]; D --> E(( ));
```

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.

Step 2 of 2: Action Required

Order	Name	Action	Action Required
3	Approve	Comment	<input type="radio"/> Any <input checked="" type="radio"/> All
3	Approve	Comment	
3	Approve	Comment	

Previous Done Cancel

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.

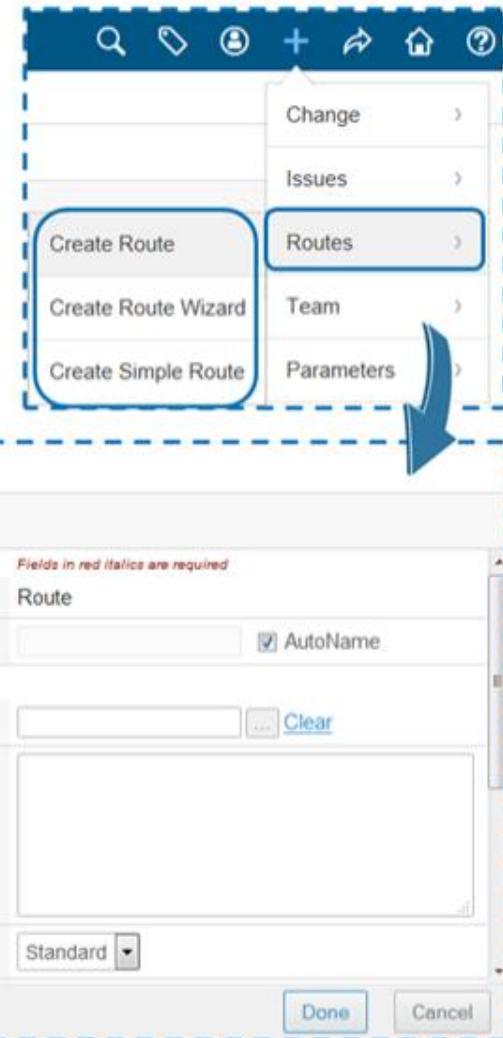
The screenshot shows the 3DEXPERIENCE | ENOVIA Collaboration software interface. The top navigation bar includes the DS logo, a play button icon, and the text "3DEXPERIENCE | ENOVIA Collaboration..". On the left, a vertical sidebar menu is open under the "Collaboration and Approvals" section, showing options like Home, Issues Summary, Shortcuts..., Collections, Utilities, and Routes (with "Routes Summary" selected). The main content area is titled "Routes Summary | Filter:Active". It features a toolbar with icons for sorting, filtering, and other operations. Below the toolbar is a table with columns: Name, Description, Route Base Purpose, State, and Sc. Two rows are visible in the table:

Name	Description	Route Base Purpose	State	Sc
Product_Design-XXX	Route for Design An...	Standard	Started	Da
Route for Workflow Proce	Workflow process &...	Standard	Started	Or

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.

Step 1 of 4: Specify Details

Add Content Remove Selected

Fields in red *italics* are required.

Name *for Workflow Process-XXX* AutoName

Template [Clear](#)

Description *Workflow process for the Data Analysis Workspace*

Route Base Purpose **Standard**

Scope All Organization Data Analysis-XXX

Route Completion Action **Notify Route Owner**

Start Route Upon Wizard Completion Manually

Auto Stop On Rejection **Immediate**

Content

Name	Rev	Ver	State Condition
Process Document-XXX	0	1	IN_WORK

Next **Cancel**

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.

Step 1 of 4: Specify Details

Add Content Remove Selected

Fields in red *italics* are required.

Name *for Workflow Process-XXX* AutoName

Template [Clear](#)

Description Workflow process *for the Data Analysis Workspace*

Route Base Purpose Standard

All Organization Data Analysis-XXX

Scope

Route Completion Action Notify Route Owner

Start Route Upon Wizard Completion
Manually

Auto Stop On Rejection Immediate

Content

<input type="checkbox"/>	Name	Rev	Ver	State Condition
<input type="checkbox"/>	Process Document-XXX	0	1	IN_WORK

[Next](#) [Cancel](#)

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.

The screenshot illustrates the process of viewing a route's details. At the top, a 'Routes Summary' table shows two routes: 'Product_Design-XXX' and 'Route for Workflow Proc...'. A large blue arrow points from the 'Product_Design-XXX' row to the detailed view below. The detailed view includes:

- Route Summary:** Shows 'Product_Design-XXX' as the route name, 'Route for Design Analysis' as the description, 'Anne-XXX' as the owner, and the modification date '4/19/2016 7:30:16 AM'.
- Properties Tab:** Contains a table with route properties:

Name	Product_Design-XXX	State	Started
Owner	Anne Taylor	Scope	Data Analysis-XXX
Description	Route for Design Analysis	Template	Route for Design Analysis
Originated	19 Apr, 2016	Route Base Purpose	Standard
Route Completion Action	Notify Route Owner	Auto Stop On Rejection	Immediate
- Tasks (Graphical) Tab:** Displays a graphical workflow diagram with four states connected by arrows:
 - Green square icon (Comment) → Yellow square icon (comment Anne Taylor)
 - Yellow square icon (comment Anne Taylor) → Grey square icon (Approve)
 - Grey square icon (Approve) → Blue square icon (Finalize)

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.

The screenshot shows the 'Access' tab selected on the route's configuration page. A context menu is open, with the 'Add People' option highlighted. A large blue arrow points from this menu item down to a 'Select Person' dialog box.

Route Details:
R-0000101 Check details
Route

Owner: Bronn-XXX
Modified: 10/13/2015 11:54:13 AM

Access Tab Options:
Properties Content Access Discussions History

Select Person Dialog:

Name	Full Name	Email	State	Action
Alice-XXX	Alice Fey	Alice-XXX@3d...	Active	[Edit]
<input checked="" type="checkbox"/> Anne-XXX	Anne Taylor	Anne-XXX@3d...	Active	[Edit]
Bronn-XXX	Bronn Glover	Bronn-XXX@3...	Active	[Edit]
Mark-XXX	Mark Williams	Mark-XXX@3d...	Active	[Edit]

4 objects, 1 selected

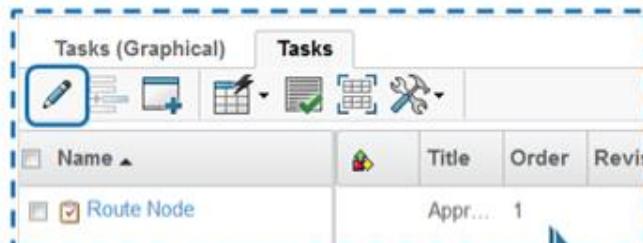
Done Cancel

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.



Step 1 of 2: Add/Edit Tasks

	Title, Action & Order	Assignee & Instructions	Due Date & Time
<input type="checkbox"/>	Final Approval Action: Approve Order: 1	Bronn Glover Final Approval	<input checked="" type="radio"/> 5:00 PM Clear <input type="radio"/> day(s) from Route Start Date <input checked="" type="radio"/> Assignee-Set Due Date <input type="checkbox"/> Allow Delegation <input type="checkbox"/> Requires Owner Review <input checked="" type="radio"/> Oct 14, 2015 <input type="radio"/> 5:00 AM Clear <input type="radio"/> day(s) from Route Start Date <input checked="" type="radio"/> Assignee-Set Due Date <input checked="" type="checkbox"/> Allow Delegation <input checked="" type="checkbox"/> Requires Owner Review
<input type="checkbox"/>	Review and Approve Action: Approve Order: 1	Anne Taylor Review and Approve	

Step 2 of 2: Action Required

Order	Name	Action	Action Required
1	Final Approval	Approve	<input type="radio"/> Any <input checked="" type="radio"/> All
1	Review and Approve	Approve	

Next Cancel

Step 2 of 2: Action Required

Order	Name	Action	Action Required
1	Final Approval	Approve	<input type="radio"/> Any <input checked="" type="radio"/> All
1	Review and Approve	Approve	

Previous Done Cancel

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.

Step 1 of 2: Add/Edit Tasks

Title, Action & Order	Assignee & Instructions	Due Date & Time
<input type="checkbox"/> Final Approval Action: Approve Order: 1	Bronn Glover Final Approval	<input type="radio"/> <input type="text"/> <input type="button" value="5:00 AM"/> <input type="button" value="Clear"/>
Advanced <input type="radio"/> <input type="text"/> day(s) from <input type="button" value="Route Start Date"/> <input checked="" type="radio"/> Assignee-Set Due Date <input type="checkbox"/> Allow Delegation <input checked="" type="checkbox"/> Requires Owner Review		

Properties

Message		Owner	Anne-XXX
Originated	Oct 8, 2015 12:12:39 PM	Due Date	Oct 9, 2015 12:12:39 PM
Allow Delegation	No	Assignee	Bronn Glover
Routes	Product_Design-XXX	Action	Approve
Approval Status	None	State	Assigned
Task Requirement	Optional	Instructions	Approve
Comments		Route Owner Review	No

Tasks | Filter: All Tasks

Name			Title	Type
IT-0000100	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Review...	Comm
IT-0000103	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approv...	Approv
IT-0000104	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approve	Approv



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.

Name	Type	Organization	Access
Bronn Glover	Person	MyCompany	Add Remove
Anne Taylor	Person	MyCompany	<ul style="list-style-type: none">ReadAddAdd RemoveReadRead WriteRemove

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.

The screenshot illustrates the Oracle Service Cloud interface for managing route tasks. At the top, a dashed box encloses the 'Tasks' list view, which shows two tasks: 'IT-0000107' and 'IT-0000106'. Task 'IT-0000107' is selected, indicated by a blue border around its row. A large blue arrow points from the 'Comments' field in the 'Edit Task Details' dialog down to the selected task in the list view. The 'Edit Task Details' dialog is also enclosed in a dashed box and contains fields for 'Due Date' (set to 'Oct 14, 2015'), 'Assignee' ('Bronn Glover'), and a 'Comments' text area. Below these fields are 'Complete' and 'Cancel' buttons. The 'Properties' tab of the dialog is active, showing task details like 'Originated' (Oct 13, 2015), 'Allow Delegation' (No), and 'Action' (Comment). The 'Comments' section in the properties shows the placeholder 'Route Owner Review' with a 'No' checkbox. The entire interface is framed by a dashed border.

Tasks | Filter: All Tasks

Name		Title	Type	Status
IT-0000107	✓	Check	Comment	Asigned
IT-0000106	✓	Notifica...	Notify Only	Co...

Properties

Message	Owner	Bronn-XXX
Originated	Due Date	Oct 14, 2015 7:27:27
Allow Delegation	Assignee	Bronn Glover
Routes	Action	Comment
Approval Status	State	Assigned
Task Requirement	Instructions	Check
Comments	Route Owner Review	No

Edit Task Details

Fields in red italics are required

Due Date
Oct 14, 2015 5:00 AM Clear

Assignee
Bronn Glover

Comments

Complete Cancel

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.

IT-0000106
Notification
Inbox Task (1)

State : Review → Complete
Owner : Bronn-XXX
Modified : 10/13/2015 2:51:09 PM

Properties

Message	Owner	Bronn-XXX
Originated	Due Date	Oct 14, 2015 7:21:07 PM
Allow Delegation	Assignee	Bronn Glover
Routes	Action	Notify Only
R-0000103	State	Complete
Approval Status	Instructions	Notification
None		
Task Requirement		
Optional		

Route Completion Notice

Attachments

Mail Properties

From	User Agent
To	Bronn Glover
CC	
Subject	Route Completion Notice
Message	Please check following Business Object(s): "Route" "R-0000103" 'Route' 'R-0000103' " is Complete Route R-0000103
Received	Oct 13, 2015



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 diagram illustrates the workflow for completing a route task. On the left, a screenshot of a route task list shows a context menu with options: Change Assignee..., Edit Details..., Approve (selected), Reject, and Abstain. The 'Approve' button is highlighted with a blue selection bar. The task details include: Owner (Bronn-XXX), Due Date (Oct 14, 2015 7:32:18 PM), Assignee (Bronn Glover), Action (Approve), State (Assigned), and Instructions (Validate). A large blue arrow points from the 'Approve' button in the list to the 'Edit Task Details' dialog on the right. The 'Edit Task Details' dialog shows the task information: Due Date (Oct 14, 2015), Assignee (Bronn Glover), and a Comments field. At the bottom are 'Approve' and 'Cancel' buttons.

- 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.

The screenshot shows the 'Properties' page of a route named 'Workflow Process-X'. The 'Save as Template...' option is highlighted with a blue arrow. A large blue arrow points from the 'Properties' page to the 'Route for Workflow Process-XX...' dialog. Inside the dialog, a callout box points to the 'Availability' section, which includes 'User' and 'Workspace/Project Space' options, with 'Workspace/Project Space' selected. Another callout box points to the 'Scope' section, which includes 'All' and 'Organization' options, with 'All' selected. The 'Template Data' section at the bottom has 'Task Assignees' checked. Buttons for 'Done' and 'Cancel' are at the bottom right.

Identifies who can use the template.

Route for Workflow Process-XX...

Type: Route Template

Template Name: Standard Template-XXX

Description: This is the standard route template for workflow processes

Availability:

User

Workspace/Project Space

Workspace/Project Space: Data Analysis-XXX

Scope:

All

Organization

Route Task Edits: Modify/Delete Task List

Save Options:

Save as New Template

Template Data:

Task Assignees

Done Cancel

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.

Route for Workflow Process-XX ..

Fields in red *italics* are required

Type
Route Template

Template Name
Standard Template-XXX

Description
This is the standard route template for workflow processes

Availability
 User
 Workspace/Project Space

Workspace/Project Space
Data Analysis-XXX

Scope
 All
 Organization

Route Task Edits
 Modify/Delete Task List

Save Options
 Save as New Template

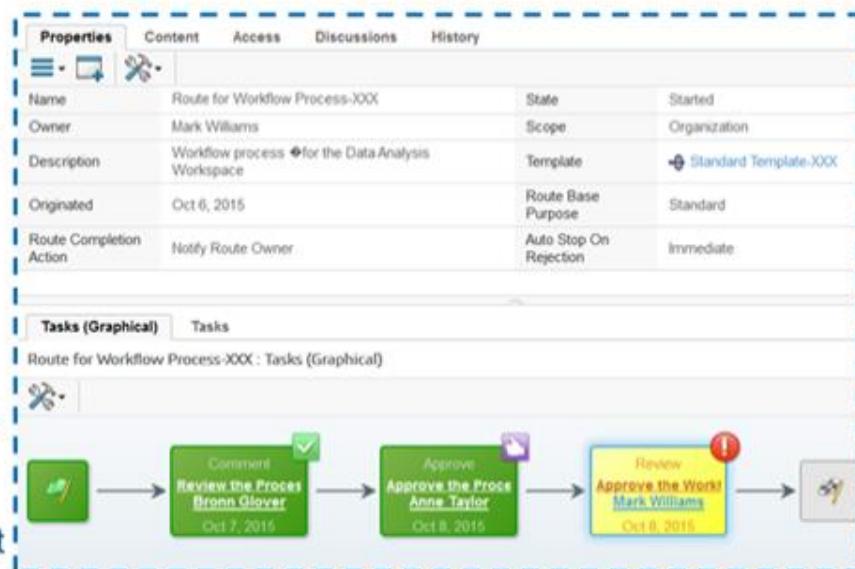
Template Data
 Task Assignees

Done **Cancel**

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

The screenshot shows the ENOVIA Collaboration and Approvals App interface. At the top, there is a toolbar with various icons for tasks like filter, search, and edit. Below the toolbar is a table titled 'Tasks | Filter: All Tasks' showing two rows of data:

Name		Title	Type
IT-0000101	<input checked="" type="checkbox"/>	Comment	Comment
IT-0000102	<input checked="" type="checkbox"/>	Approve the...	Approve

Below the table, a specific task is selected: 'IT-0000108 Approve the Process Document'. The task details are shown: State: Assigned, Review button, Owner: Bronn-XXX, Modified: 2/2/2015 3:41:15 PM. A dropdown menu labeled 'Properties' is open, listing options: Change Assignee..., Edit Details..., Approve, Reject, Abstain. Underneath the properties, the task status is listed as Approval Status: None and Task Requirement: Optional.

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.

The screenshot shows the ENOVIA Collaboration and Approvals interface. On the left, there is a navigation sidebar with the following items:

- Collaboration and Approvals
- Home
- Issues Summary
- Shortcuts...
- Collections
- Utilities
- Routes
- Tasks

The main area is titled "Tasks | Filter: All Tasks". It features a toolbar with various icons for managing tasks. Below the toolbar is a table with the following columns:

Name			Title	Type	State	
IT-0000101	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Comment	Comment	Complete	
IT-0000102	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Approve t...	Approve	Complete	

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.

Tasks Filter:All Tasks											
<input type="checkbox"/>	Name			Title	Type	State	Instructions	Due Date	Context		Workspace
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	IT-0000101			comment	Comm...	Assigned	comment	20 Apr...	Produc...		Data A... 
<input type="checkbox"/> <input checked="" type="checkbox"/>	IT-0000102			Approv...	Approve	Assigned	Approve th...	21 Apr...	Route...	1	Data A... 

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

The screenshot shows the SAP Fiori Tasks application interface. On the left, there is a list of tasks with one task selected: "IT-0000108 Approve the Process Document". The main area displays the "Properties" page for this task. The "Actions" menu, which includes options like "Change Assignee...", "Edit Details...", "Approve", "Reject", and "Abstain", is highlighted with a blue rounded rectangle. A large blue arrow points from the "Properties" page back to the task list on the right.

Tasks Filter: All Tasks				
Name			Title	Type
IT-0000101	✓	✗	Comm...	Com...
IT-0000102	✓	▲	Approv...	App...

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.

Drop images here

IT-0000102
Approve the Process Document
Inbox Task (1) 1+

State : Assigned [+ Review](#)
Owner : Anne-XXX
Modified : 4/20/2016 8:00:51 AM

[Properties](#) [Edit](#) [Delete](#) [Details](#)

Properties	Message	Owner	Mark-XXX
Originated	20 Apr, 2016 12:30:51 PM	Due Date	21 Apr, 2016 5:00:00 PM
Allow Delegation	Yes	Assignee	Anne Taylor
Routes	Route for Workflow Process-XXX	Action	Approve
Approval Status	None	State	Assigned
Task Requirement	Optional	Instructions	Approve the Process Document
Comments		Route Owner Review	No

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

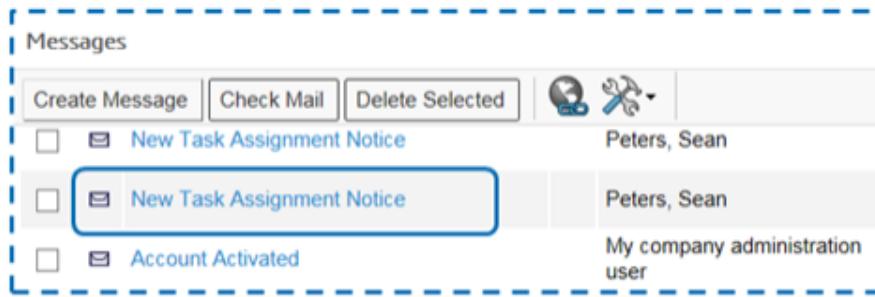
- For task assignees, the state can be **Assigned** or **Complete**. For a task owners, it can be **Pending**, **Assigned**, **Review** or **Complete**.

The screenshot shows the Oracle BPM Worklist interface. A specific task, "IT-0000101", is selected. The top bar displays the task ID, state ("Review"), and a "Complete" button. Below the bar, the task details are shown: Comment, Owner (Anne-XXX), and Modified date (10/8/2015 7:42:39 AM). A red box highlights the "Inbox Task (2)" link, which has a red badge with the number "1". The main area contains a table of properties:

Properties			
	Message	Owner	Anne-XXX
Originated	Oct 6, 2015 7:17:13 PM	Due Date	Oct 7, 2015 5:00:00 AM
Allow Delegation	No	Assignee	Anne Taylor
Routes	Product_Design-XXX	Action	Comment
Approval Status	Approve	State	Complete
Task Requirement	Optional	Instructions	Comment
Comments	ok	Route Owner Review	No

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.

The diagram illustrates the process of filtering tasks. On the left, a screenshot of the 'Tasks | Filter: All Tasks' page shows a dropdown menu with options: 'All Tasks', 'Active', 'Complete', and 'Tasks to be Accepted'. A blue arrow points from this menu to the right screenshot. The right screenshot shows the 'Tasks | Filter: Tasks to be Accepted' page, which displays a single task row:

Name	Title
IT-0000100	Review the P

The task row includes a checkbox, a green checkmark icon, and a blue checkmark icon.

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.

The screenshot shows a task properties page with a dashed blue border. At the top, there is a file upload area labeled "Drop Images here". Below it, the task ID is "IT-0000100" and the subject is "Review the Process Document". The status is "Assigned" with a "Review" button. The owner is "Documentation" and the modified date is "10/6/2015 7:10:18 AM". A red box highlights the "Accept Task" button in the "Properties" section. Other sections include "Review the Process Document", "Routes", "Revision", and "History".

The screenshot shows a task properties page with a dashed blue border. The "Properties" tab is selected, showing various settings: Message, Originated (Oct 6, 2015 11:40:17 AM), Allow Delegation (No), Routes (Route for Workflow Process-XXX), Approval Status (None), Task Requirement (Optional), Comments, Owner (Mark-XXX), Due Date (Oct 7, 2015 5:00:00 PM), Assignee (Bronn Glover), Action (Comment), State (Assigned), Instructions (Review the Process Document), and Route Owner Review (No). A large blue arrow points from the bottom towards the "Accept Task" button in the top right corner of the properties panel.

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.

The screenshot illustrates the Oracle Service Cloud interface for creating and managing tasks. At the top, there's a navigation bar with tabs for 'Tasks (Graphical)' and 'Tasks'. Below the tabs are various icons for creating, deleting, and modifying tasks. A main table lists tasks with columns for Name, Title, Order, Revision, and Status. Two tasks are visible: one for 'IT-0000104(t)' and another for 'IT-0000104(l)'. The task for 'IT-0000104(t)' is currently selected. A large blue arrow points from the bottom-left towards this selected task, indicating the focus of the step. In the foreground, a modal dialog titled 'Step 1 of 2: Add/Edit Tasks' is open. It has three tabs: 'Title, Action & Order', 'Assignee & Instructions', and 'Due Date & Time'. The 'Title, Action & Order' tab is active, showing a 'Comment' entry for Taylor, Anne, an 'Action' dropdown set to 'Comment', an 'Order' of 1, and a second row for an 'Approve' action assigned to Bronn Glover with an order of 2. The 'Assignee & Instructions' tab shows an 'Approve' button. The 'Due Date & Time' tab includes fields for setting a due date (Oct 7, 2015), time (12:30 AM), and advanced options like 'day(s) from' and 'Assignee-Set Due Date'. At the bottom of the modal are 'Next' and 'Cancel' buttons.

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**.

The screenshot shows the 'Tasks' page with a list of tasks. A task titled 'IT-0000102' has its checkbox checked and is highlighted with a blue border. A large blue arrow points from this task to a detailed 'Edit Task Details' dialog box. The dialog box contains fields for 'Due Date' (Oct 8, 2015), 'Assignee' (Anne Taylor), 'Comments' (Approved), and 'Approval Status' (Approve). It also includes 'Done' and 'Cancel' buttons.

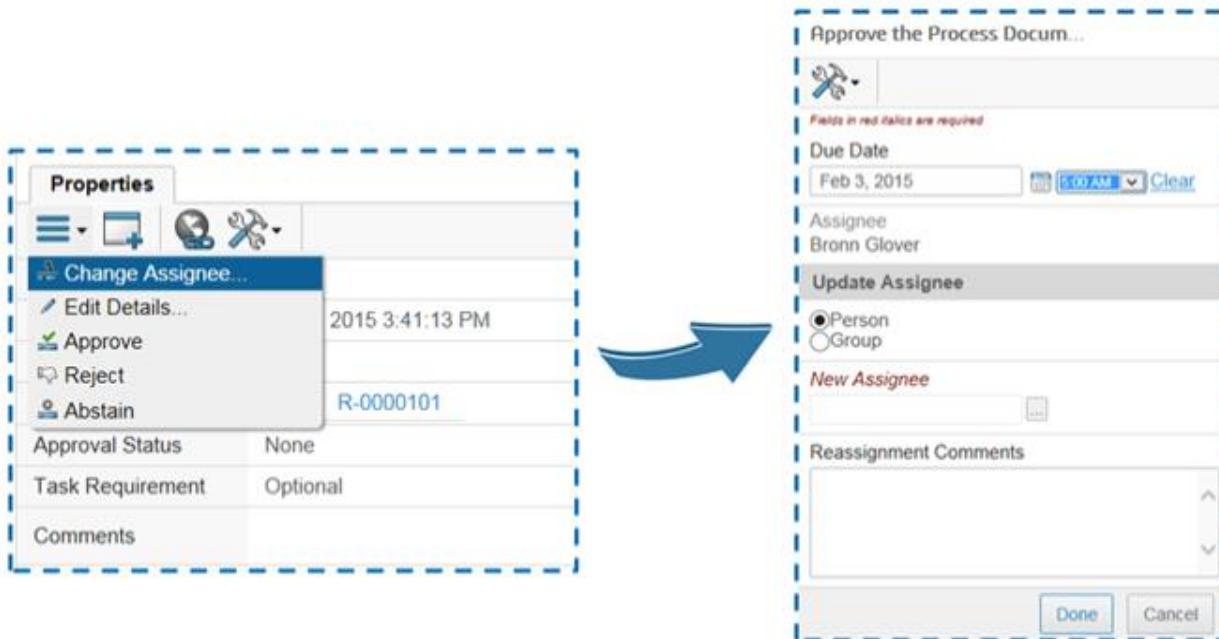
- B. If you have instructions to approve a task; in the task's **Properties** page, select **Actions > Approve** to complete the task.

The screenshot shows the 'Properties' page for a task. A context menu is open, with the 'Approve' option highlighted in blue. A large blue arrow points from this menu to a detailed 'Edit Task Details' dialog box. The dialog box contains fields for 'Due Date' (Oct 9, 2015), 'Assignee' (Bronn Glover), and 'Comments'. It also includes 'Approve' and 'Cancel' buttons.

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.

Tasks Filter: All Tasks						
	Name		Title	Type	State	Instructions
<input checked="" type="checkbox"/>	IT-0000105	<input checked="" type="checkbox"/>	IT-0000105	Approve	Complete	Approve

Working with Subscriptions

The screenshot shows a software interface titled "R-0000100-01 rev A : Subscription". At the top, there is a toolbar with various icons. Below the toolbar is a table with two columns: "Subscription Events" and "Type". The table contains several rows of data:

Subscription Events	Type
New Discussion	Event
Dorothy-XXX	Person
Chao-XXX	Person
Bronn-XXX	Person
Part Complete	Event
Chao-XXX	Person
Bronn-XXX	Person

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.

The screenshot shows the 3DEXPERIENCE | ENOVIA Collaboration and Approvals application. At the top, there is a navigation bar with a logo, the title, and a search icon. On the left, a vertical sidebar menu is open, showing options like Change Management, Collaboration and Approvals, Utilities, Routes, and Subscriptions. The Subscriptions option is highlighted. The main area is titled "Subscriptions" and contains a table with three rows of data. The columns are Name, Revision, Type, Description, and Event. The data rows represent "Reference Document-XXX" with revision 0, categorized as a Document, with descriptions and events related to content additions, modifications, and changes.

Name	Revision	Type	Description	Event
Reference Document-XXX-	0	Document	Reference Document-XXX	Content Add
Reference Document-XXX-	0	Document	Reference Document-XXX	Content Mod
Reference Document-XXX-	0	Document	Reference Document-XXX	Content Chg

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.

A-0000100-01 rev A : Subscription

The screenshot shows a table with columns for 'Subscription Events', 'Type', and 'Email Address'. The 'Subscription Events' column contains checkboxes for various events like 'New Discussion', 'Part Complete', and 'Part Deleted'. The 'Type' column shows event types like 'Event' and 'Person'. The 'Email Address' column lists email addresses corresponding to the subscribers. A blue arrow points from the 'Subscription Events' column towards the bottom right icon table.

Subscription Events	Type	Email Address
<input type="checkbox"/> New Discussion	Event	
<input type="checkbox"/> Dorothy-XXX	Person	Dorothy-XXX@3DS.COM
<input type="checkbox"/> Chao-XXX	Person	Chao-XXX@3DS.COM
<input type="checkbox"/> Bronn-XXX	Person	Bronn-XXX@3DS.COM
<input type="checkbox"/> Part Complete	Event	
<input type="checkbox"/> Chao-XXX	Person	Chao-XXX@3DS.COM
<input type="checkbox"/> Bronn-XXX	Person	Bronn-XXX@3DS.COM
<input checked="" type="checkbox"/> Part Deleted	Event	
<input type="checkbox"/> Part Moved to Product	Event	

Note:

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

The screenshot shows the 'Properties' tab of an object's properties dialog. It displays the name 'A-0000100-01', primary image, type 'Part', and revision 'A'. A blue arrow points from the 'Properties' tab towards the top left icon table.

Properties	Images	Where Used	Revisions	»
Name A-0000100-01	Primary Image	Type Part	Revision A	

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

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.

The screenshot shows the 3DEXPERIENCE interface. On the left, a dialog box titled "Route for Workflow Process-XXX : Subscription Opti..." lists "Subscription Events" with checkboxes for: Route Started, Content Added, Content Removed, Task Completed, Route Completed, and New Discussion. A blue arrow points from this dialog to the "Subscribe..." option in the context menu on the right. The context menu is open over a "Route" card for "Route for Workflow Process-XXX". The menu items are: Save as Template..., Start Route..., **Subscribe...**, Push Subscription..., Route Completion, and Notify Route Owner. The "Subscribe..." item is highlighted with a blue box.

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

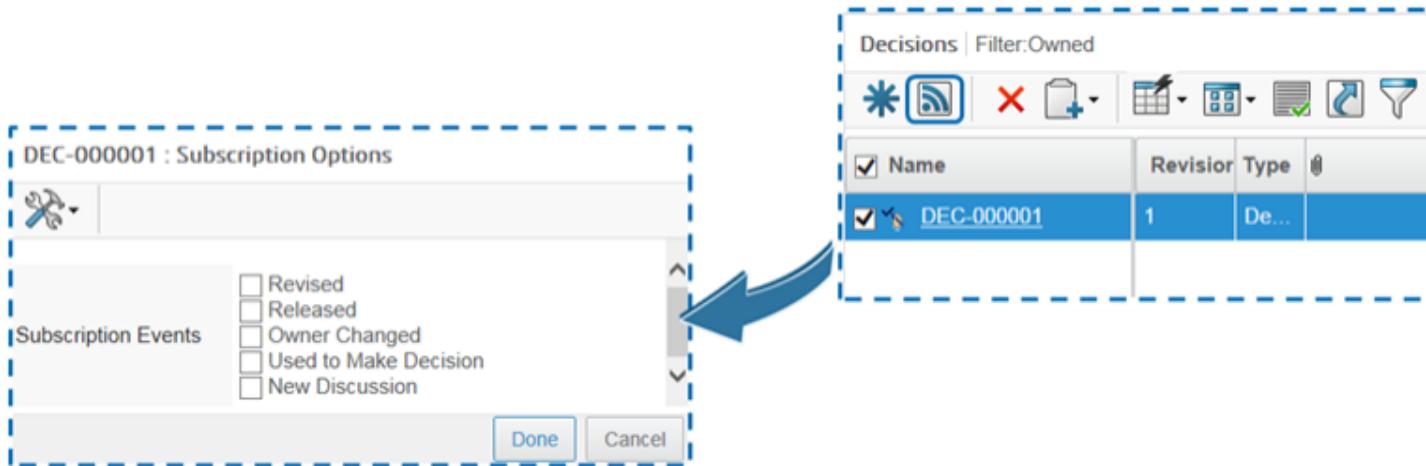
You can subscribe to an issue, to be notified when anyone makes a change to the issue. The **Subscribers** field on the issue's **Properties** page lists the people who have subscribed to the specific issue.

The screenshot illustrates the process of selecting subscription events for an issue. On the left, a 'Subscription Options' dialog box is shown with a dashed border. It contains a title 'ISS-0000001 : Subscription Options' and a section for 'Subscription Events' with two checkboxes: 'Issue Modify' (which is checked) and 'New Discussion'. At the bottom are 'Done' and 'Cancel' buttons. A large blue arrow points from the 'Subscription Options' dialog to the 'Properties' page on the right, which also has a dashed border. The 'Properties' page displays details for 'ISS-0000002' (Issue for Route Workflow Process-XXX). The 'Properties' tab is selected, showing fields like Name (ISS-0000002), Type (Issue), Description (Issue for Route Workflow Process-XXX), and State (Create). Other tabs include Assignees, Reference Documents, Reported Against, Resolved By, Resolved Items, Routes, Discussions, Lifecycle, and History.

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.

The screenshot shows a software interface for managing workflow routes. At the top, there's a navigation bar with tabs: Properties, Content, Access, Discussions, and History. Below the navigation bar is a context menu with several options: Save as Template..., Start Route..., Subscribe..., Push Subscription..., and another Push Subscription... option. The Push Subscription... option is highlighted with a blue box and has a dropdown arrow pointing to the right. Below the context menu, there's a section titled "Route for Workflow Process-XXX : Push Subscription". This section contains a table with three columns: "Subscription Events", "Push Subscription Recipients", and "Subscription Recipients". The table lists six events: Route Started, Content Added, Content Removed, Task Completed, Route Completed, and New Discussion. Each row shows zero recipients for both push and subscription. At the bottom of the dialog box is a "Close" button.

Subscription Events	Push Subscription Recipients	Subscription Recipients
Route Started	0	0
Content Added	0	0
Content Removed	0	0
Task Completed	0	0
Route Completed	0	0
New Discussion	0	0

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.

The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar contains the following items:

- Collaboration and Approvals
- Home
- Issues Summary
- Shortcuts...
- Collections
- Utilities
- Routes
- Tasks
- Subscriptions

The main content area is titled "Subscriptions". It features a toolbar with icons for delete, add, edit, and search. Below the toolbar is a table with the following columns: Name, Revision, Type, Description, and Event. The table contains three rows of data:

Name	Revision	Type	Description	Event
A-0000102-01	A	Part		Part Complete
DEC-000002	1	Decision		New Discussion
DOC-0000002	0	Document		Content Added

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.

The screenshot shows two windows side-by-side. On the right is the 'Discussion Task Discussion-XXX : Properties' window. It displays two messages: 'Task Discussion-XXX' from 'Williams Mark' at '02-Dec-2016 14:04:32' and 'Discussion on the task assigned to each member' with a link to 'Attachments'. Below it is another message 'Re Task Discussion-XXX' from 'Glover Bronn' at '02-Dec-2016 14:23:55' with the text 'I have one review task and an approval task this week.' and a link to 'Attachments'. On the left is the 'Subscription Events' dialog, which has a title 'Discussion on the tasks assigned to each member : Subs...', a toolbar with a wrench icon, and a checkbox 'New Reply' checked. At the bottom are 'Done' and 'Cancel' buttons. A blue arrow points from the 'Done' button in the dialog to the 'Attachments' link in the second message on the properties page.

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)

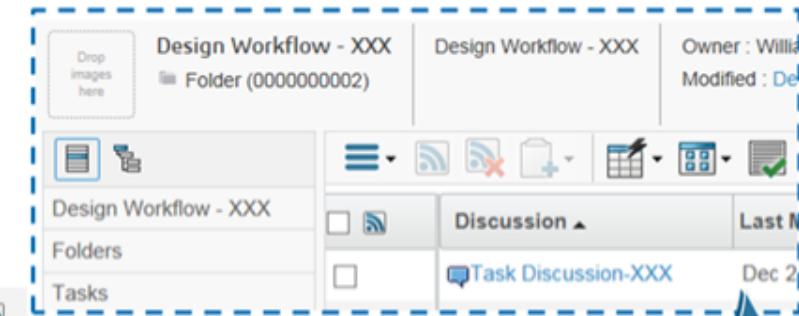
- A. On the **Subscriptions** page, click the message name to view the discussion's **Properties** page. You can use the **Public Reply** or **Private Reply** options for replying to the message/discussion thread.

The screenshot illustrates the workflow for replying to a subscription notification:

- Subscriptions Page:** Shows a list of subscriptions. One subscription, "MSG-41480667672550", is highlighted with a blue border. A large blue arrow points from this row to the "Message" section of the properties dialog.
- Message Properties Dialog:** Displays details for the selected subscription:
 - Message:** MSG-41480667672550
 - Description:** Discussion on the task assigned to each member
 - State:** Inactive (button)
 - Owner:** Williams Mark
 - Modified:** Dec 2, 2016 2:04:32 PM
- Reply Dialog:** A modal window titled "Reply" contains the following fields:
 - Original Message:** Discussion on task assignment
 - Subject:** Re Assigning Tasks
 - Message:** (Empty text area)
 - Visibility:** Public
- Buttons at the bottom of the Reply dialog:** Done and Cancel.

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.

The screenshot shows the 'Task Discussion-XXX : Properties' page. The header includes 'Drop images here', 'MSG-41480667672550', 'Message', 'Discussion on the task assigned to each member', 'State : Inactive Active', 'Owner : Williams Mark', 'Modified : Dec 2, 2016 4:39:12 PM', and another 'Drop files here'. The main content area displays three messages:

- Task Discussion-XXX** **Williams Mark** **Dec 2, 2016 2:04:32 PM**
Discussion on the task assigned to each member
@ Attachments
- Re Task Discussion-XXX** **Glover Bronn** **Dec 2, 2016 2:23:55 PM**
I have one review task and an approval task this week.
@ Attachments
- Re Task Discussion-XXX** **Johnson Xavier** **Dec 2, 2016 2:24:25 PM**
ok
@ Attachments

Replying to a Subscription Notification (4/4)

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

The screenshot illustrates the process of viewing mail properties. At the top, a dashed blue box encloses the 'Messages' interface. This interface includes a toolbar with 'Create Message', 'Check Mail', 'Delete Selected', and other icons. Below the toolbar is a table with columns for 'Subject' and 'From'. Three messages are listed: 'Re Task Discussion-XXX' from 'Johnson Xavier', 'Re Task Discussion-XXX' from 'Glover Bronn', and 'Re Task Discussion-XXX' from 'Williams Mark'. The first message is highlighted with a red box. A large blue arrow points from this highlighted message down to a second dashed blue box at the bottom, which contains the 'Mail Properties' dialog for the selected message.

Messages

	Subject	From
<input type="checkbox"/>	Re Task Discussion-XXX	Johnson Xavier
<input type="checkbox"/>	Re Task Discussion-XXX	Glover Bronn
<input type="checkbox"/>	Re Task Discussion-XXX	Williams Mark

Mail Properties

Re+Task+Discussion-XXX	Attachments
From Johnson Xavier	
To Glover Bronn;Williams Mark	
CC	
Subject Re Task Discussion-XXX	
Message	
Re Task Discussion-XXX ok Basic Information: Type = Workspace Name = Design Workflow - XXX Workspace Design Workflow - XXX 0000000002 Revision = 0000000002 Owner = Mark-XXX Discussion Thread = Task Discussion-XXX Message MSG-41480667672550	

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.

0001 rev 1 : Subscription			
		Type	Email Address
<input type="checkbox"/>	Subscription Events ▾		
<input type="checkbox"/>	Part Revised	Event	
	<input type="checkbox"/> Dorothy-XXX	Person	Dorothy-XXX@3DS.COM
<input checked="" type="checkbox"/>	Part Deleted	Event	
	<input type="checkbox"/> Dorothy-XXX	Person	Dorothy-XXX@3DS.COM
<input type="checkbox"/>	Part Approved	Event	
	<input type="checkbox"/> Chao-XXX	Person	Chao-XXX@3DS.COM

Managing Issues

The screenshot shows the ENOVIA Collaboration and Approvals App interface. At the top, there is a header with the issue ID "ISS-0000001", the title "Issue in the workflow process", and status information: "State : Closed", "Owner : Bronn-XXX", and "Modified : 10/8/2015 8:55:16 AM". Below the header is a sidebar with links: "Issue", "Assignees", "Reference Documents", "Reported Against", "Resolved By", "Resolved Items", "Routes", "Discussions", "Lifecycle", and "History". The main content area is titled "Properties" and contains the following data:

Name	ISS-0000001
Type	Issue
Description	Issue in the workflow process
State	Closed
Last State Change	Oct 8, 2015
Owner	Bronn Glover
Originator	Bronn-XXX

Below the properties table are three buttons: "Reported Against", "Resolved By", and "References". Under "Reported Against", there is a table with columns "Name" and "Revision". One row in the table is visible, showing "Route for Workflow Process-XXX" and "00000000".

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.

The screenshot shows the 3DEXPERIENCE | ENOVIA Collaboration and Approvals interface. On the left, a sidebar menu includes 'Change Management', 'My Changes', 'Collaboration and Approvals', 'Home', 'Issues Summary', 'Issue Categories' (which is selected and highlighted), 'Shortcuts...', and 'Collections'. In the main area, there's a 'New Docs' toolbar with icons for creating documents, and a list of items with columns for 'Name', 'Type', and 'Title'. A context menu is open over one of the items, showing options: 'Create New Category', 'Add Existing Classification...', and 'Delete'. A blue arrow points from the 'Create New Category' option to the 'Create Category' dialog box.

The 'Create Category' dialog box has a title 'Create Category' with icons for globe and wrench. It contains a note: 'Fields in red italics are required.' Below are fields for 'Type' (set to 'Issue Category'), 'Name' (set to 'Design Issues'), and 'Description' (set to 'All design issues should be classified under this category.'). At the bottom are 'Apply', 'Done', and 'Cancel' buttons. A blue arrow points from the 'Description' field in the dialog to the 'Description' field in the 'Category/Classification' table below.

Category/Classification	
Name	Description
Design Issues	All design issues should be under this category.

About Issues (2/5)

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

The screenshot illustrates the process of creating a new classification object for an issue category. It consists of three main sections:

- Left Panel:** A navigation sidebar with a dashed blue border containing links: Change Management, My Changes, Collaboration and Approvals, Home, Issues Summary, and Issue Categories.
- Middle Panel:** A "Category/Classification" table with a dashed blue border. It has columns: Name, Description, Type, and Issue Owned By. Two rows are visible:
 - Design Issues**: Description: "All design issues should be classified under this category.", Type: "Issue Category".
 - Safety**: Description: "All safety issues due to design", Type: "Issue Classification", Issue Owned By: "Peters Erik".
- Right Panel:** A modal dialog titled "Design Issues|Create Classification" with a dashed blue border. It contains fields:
 - Type: "Issue Classification".
 - Name: "Safety".
 - Description: "All safety issues due to design".
 - Issue Owned By: "Peters Erik".
 - Buttons: "Done" and "Cancel".A large blue arrow points from the "Create New Classification" button in the middle panel to the "Name" field in the right panel, indicating the flow of data.

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.

The screenshot shows an issue card for 'ISS-0000004'. The card includes the following details:

- Issue Summary:** ISS-0000004, Issue for test
- Status:** Create
- Owner:** Peters Erik
- Modified:** Oct 18, 2016 3:54:40 PM

Properties:

Name	ISS-0000004
Type	Issue
Description	Issue for the safety for using a part
Reported Against	DS-Cycle Assembly
Escalation Required	<input type="radio"/> Yes <input checked="" type="radio"/> No
Estimated Start	[Empty]
Estimated Finish	[Empty]
Priority	Low
Category/Classification	Design Issues/Safety
Reporting Organization	MyCompany

Assignees: [List of users]

Reference Documents: [List of documents]

Resolved By: [List of users]

Resolved Items: [List of items]

Routes: [List of routes]

Discussions: [List of discussions]

Lifecycle: [List of lifecycle stages]

The screenshot shows the 'Create New Issue' form. The 'Category/Classification' field is highlighted with a blue box and has a blue arrow pointing from the previous screenshot's issue card. The form fields include:

- Type:** Issue
- Description:** Issue for the safety for using a part
- Reported Against:** DS-Cycle Assembly
- Escalation Required:** Yes
- Estimated Start:** [Empty]
- Estimated Finish:** [Empty]
- Priority:** Low
- Category/Classification:** Design Issues/Safety
- Reporting Organization:** MyCompany

The top navigation bar shows the following menu items:

- Change Management
- My Changes
- Collaboration and Approvals
- Home
- Issues Summary

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.

The screenshot displays the 3DEXPERIENCE ENOVIA Collaboration interface. At the top, there is a navigation bar with a play button icon and the text "3DEXPERIENCE | ENOVIA Collaboration..". Below the navigation bar, a sidebar on the left shows a tree structure under "Collaboration and Approvals" with "Issues Summary" highlighted. The main area is titled "Issues Summary" and contains a toolbar with various icons. A table lists an issue entry:

Name	Edit	Type	Description	State
ISS-0000001			Issue in the workflow proc...	Closed

A large blue arrow points from the "Issues Summary" link in the sidebar up towards the main content area, indicating the user's path to this screen.

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.

The screenshot displays the 'Issues Summary' and 'Properties' interface for an issue named 'ISS-0000001'. The 'Issues Summary' pane shows a list of issues, with 'ISS-0000001' selected. The 'Properties' pane provides detailed information about this specific issue, including its state (Closed), owner (Glover Bronn), and modification date (Nov 18, 2016). The 'Assignees' pane lists the assigned users (Taylor Anne and Williams Mark). Below the properties, sections for 'Reported Against', 'Resolved By', and 'Reference Document...' are visible, each with their own respective toolbars and lists.

Issues Summary

Name	Edit	Type	Description
ISS-0000001		Issue	Issue in the workflow process

Properties

Name	ISS-0000001
Type	Issue
Description	Issue in the workflow process
State	Closed
Owner	Glover Bronn
Modified	Nov 18, 2016 11:09:12 AM

Assignees

Name	User Name
Taylor Anne	Anne-X
Williams Mark	Mark-X

Reported Against

Name	Revision	Type	Description
Route for Workflow Process-XXX	0000000002	Route	Workflow process for the Data

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.



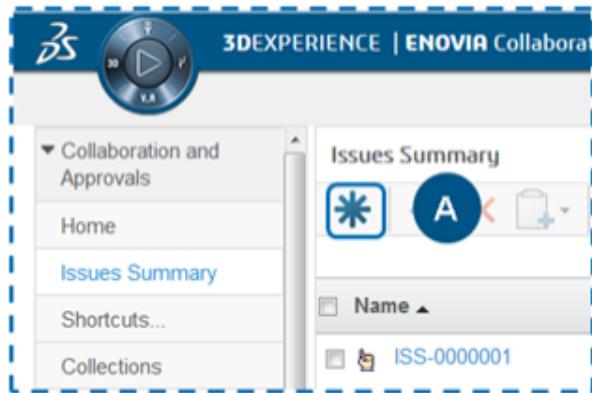
- ▶ **Review:** In this state, the owner or assignee can send the issue for review and approval, using the routing for approval process. Once approved, the issue is promoted to the **Closed** state either automatically through a route or manually (by owner or assignee).
- ▶ **Closed:** In this state,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

A screenshot of the 'Create New Issue' dialog box. At the top, there's a toolbar with icons for search, refresh, and other functions. Below it, a navigation menu shows 'Change' (selected), 'Issues' (highlighted in blue), and 'Routes'. The main area is titled 'Create New Issue' and contains fields for 'Type' (set to 'Issue'), 'Description' (a large text area), 'Reported Against' (a dropdown menu), 'Escalation Required' (radio buttons for 'Yes' and 'No', with 'No' selected), 'Estimated Start' (a date picker), and 'Estimated Finish' (a date picker). At the bottom, there are buttons for 'Clear All', 'Create Issue' (highlighted in blue), 'Done', and 'Cancel'.

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.

Create New Issue

	Estimated Start	<input type="text"/> <input type="button" value="..."/>
Priority	Low	<input type="button" value="..."/>
Co-owners	<input type="text"/> <input type="button" value="..."/>	
Problem Type	Not Determined	<input type="button" value="..."/>
Resolution Recommendation		
Steps To Reproduce		
Category/Classification <input type="text"/> <input type="button" value="..."/>		
Reporting Organization	Company Name	<input type="button" value="..."/>
Policy	Issue	
Vault	eService Production	<input type="button" value="..."/> <input type="button" value="Clear"/>
<input type="button" value="Clear All"/> <input type="button" value="Create Issue"/> <input type="button" value="Done"/> <input type="button" value="Cancel"/>		

Editing an Issue (1/2)

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

A. Using the Issues Summary page

The screenshot shows the 'Issues Summary' page with a list of issues. The first issue in the list has its edit icon highlighted with a blue circle containing the letter 'A'.

Name	Edit	Type	Description
ISS-0000001		Issue	Issue in the workflow process

B. Using an issue's Properties page

The screenshot shows the 'Properties' page for an issue. The edit icon in the toolbar is highlighted with a blue circle containing the letter 'B'.

Properties	
Change Type	
Name	ISS-0000001
Type	Issue
Description	Issue in the workflow process
State	Create
Last State Change	Oct 7, 2015
Owner	Bronn Glover

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

The screenshot shows the 'Properties' page for an issue with modified values. The 'Waiting On' field is set to 'Unassigned'. The bottom right corner features 'Done' and 'Cancel' buttons.

Properties	
Change Type	
Description	<input type="text"/>
State	Closed
Last State Change	Oct 8, 2015
Owner	Bronn Glover
Originator	Bronn-XXX
Originated Date	Oct 7, 2015
Modified Date	Oct 8, 2015
Waiting On	Unassigned

Editing an Issue (2/2)

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

The screenshot shows a 'Properties' dialog box with a dashed border. At the top is a toolbar with icons for Change Type, RSS feed, edit, globe, and wrench. Below it is a 'Classification' section. The 'Reporting Organization' field is highlighted with a blue box and contains the text 'Company Name'. Other fields include 'Policy' set to 'Issue', 'Vault' set to 'eService Production', 'Co-owners' (empty), and 'Problem Type' set to 'Functionality'. At the bottom are 'Done' and 'Cancel' buttons.

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

The diagram illustrates the process of changing an issue type. On the left, a 'Properties' dialog box shows an issue with 'Name' ISS-0000001, 'Type' set to 'Issue', and 'Description' 'Issue in the workflow process'. A blue arrow points from this dialog to a second dialog on the right, titled 'Change Issue Type'. This dialog has a 'New Type' field containing 'ISSUE'. Other fields include 'Name' ISS-0000001, 'Current Type' 'Issue', 'Policy' set to 'Issue', and 'Done' and 'Cancel' buttons at the bottom.

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.

The screenshot shows the Oracle Workflow Issue Manager interface. At the top right, there is a toolbar with icons for Properties, Change Type (set to Close), RSS feed, edit, and delete. Below the toolbar, the issue details are listed in a table:

ISS-0000001
Assignees
Reference Documents
Reported Against
Resolved By

On the right side of the screen, a large blue arrow points from the 'Close' button in the toolbar down to the 'Close ISS-0000001' section. This section contains a cancel icon, a note about required fields, and the issue name.

Below this is the 'Action Taken' section, which contains the text: "Process Document reviewed by Anne".

Further down is the 'Resolution Statement' section, containing the text: "Workflow documents to be approved and reviewed by Mark".

At the bottom, there is a 'Resolution Date' field set to "Oct 8, 2015" and two buttons: "Done" and "Cancel".

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.

The screenshot shows the 'Issues Summary' page. On the left is a navigation bar with links like 'Collaboration and Approvals', 'Home', 'Issues Summary', 'Shortcuts...', 'Collections', and 'Utilities'. The main area displays a table with one row for 'ISS-0000001'. The columns are 'Name' (containing 'ISS-0000001'), 'Edit', and 'Type' (containing 'Issue'). Below the table are standard toolbar icons for creating, deleting, and filtering items.

The screenshot shows the 'Properties' dialog for the issue 'ISS-0000001'. It includes a toolbar with icons for 'Change Type', 'Assignee', 'Reference Documents', 'Reported Against', 'Resolved By', 'Resolved Items', 'Routes', and 'Discussions'. The main panel lists properties with their values:

- Name: ISS-0000001
- Type: Issue
- Description: Issue in the workflow process
- State: Closed
- Last State Change: Oct 8, 2015
- Owner: Bronn Glover
- Originator: Bronn-XXX

Working with the Common Document Model

The screenshot shows the ENOVIA Collaboration and Approvals App interface. At the top, there is a toolbar with icons for file operations. Below it is a table with columns: Name, Title, and Revision. Two documents are listed:

Name	Title	Revision
Compliance Document-XXX-104302640266	Compliance Document-XXX	0
Compliance Document-XXX-104302640266	Compliance Document-XXX	1

At the bottom, there is a sidebar with a tree view showing workspace contents like 'Data Analysis-XXX' and 'Design_Analysis_'. To the right of the sidebar is a context menu with the following options:

- Actions ▾
- More Actions ▾
- ⊕ Add Existing...
- ⊕ Add Workspace Content...
- ⊕ Upload File(s)...
- ⊖ Create New
- ⊕ Document...

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.

The screenshot shows the 3DEXPERIENCE | ENOVIA Collaboration and Approvals interface. At the top, there's a navigation bar with a logo, search, and user icons. Below it, a header bar displays folder details: "Charting_Concepts-XXX", "Owner : Williams Mark", and "Modified : Nov 18, 2016 3:19:23 PM". To the right are buttons for "Drop files here", "Compliance Document...", and "Reference Document...". Further right are icons for notifications (6), list, home, and back/forward. A "XXX-PrivateCS" button is also present. The main area has a toolbar with "Actions", "More Actions", and various document management icons. A table lists documents with columns for Name, Title, Type, Rev, Ver, and Actions. The table shows two rows: "Compliance Document-XXX-1945" (Type: Document, Rev: 1, Ver: 1) and "Reference Document-XXX-19287" (Type: Document, Rev: 1, Ver: 1). The "Actions" column for the first row contains icons for edit, delete, and more. The entire interface is framed by a dashed blue border.

Name	Title	Type	Rev	Ver	Actions
Compliance Document-XXX-1945	Compliance...	Document	1	1	
Reference Document-XXX-19287	Reference...	Document	1	1	

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

Specifications		Reference Document Management							
		          							
	Name	Title	Lock	Checklist	Revision	Version	Type	Action	
<input checked="" type="checkbox"/>	A-0000101	A-0000101			0/0	A	CAD Drawing		
<input checked="" type="checkbox"/>	A-0000102	A-0000102			0/0	A	CAD Drawing		

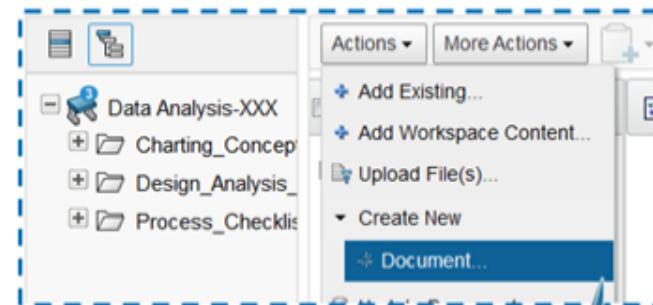
Specifications		Reference Document Management						
Name	Actions	Lock	Version	Title	Rev	Ver	Type	Actions
DOC-0000006	File	0/1	Design Algorit...	0	1	Document	View	Download
Reference Document-XXX	File	0/1	Reference Do...	0	1	Document	View	Download

New Docs		Changed Docs		My Recent Docs		>>			
 		 		 		     			
Name		Title		Actions				Rev	Ver
 Compliance Document		Compliance Document...					0/0	1	
 Process Document		Process Document-XXX	 				0/1	0	1
 DOC-0000001		Design Algorithm-XXX	 				0/1	0	1

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....**



Step 1 of 2: Specify Details

This screenshot shows the first step of the document creation wizard. It includes fields for Name, Type, Policy, Title, and Description. The 'Name' field contains 'Compliance Document-XXX' and has a checked 'AutoName' checkbox. The 'Type' field is set to 'Document'. The 'Policy' field is set to 'Document Release'. The 'Title' and 'Description' fields both contain 'Compliance Document-XXX'. A note at the top states: 'Fields in red italics are required.' There are 'Next' and 'Cancel' buttons at the bottom right.

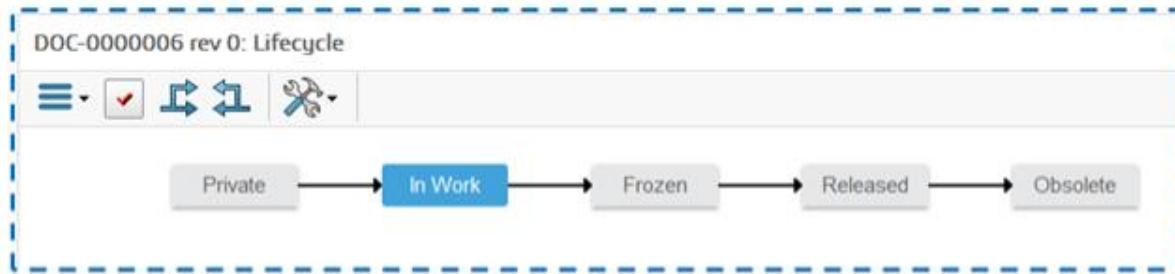
Name	Compliance Document-XXX	AutoName
Type	Document	
Policy	Document Release	
Title	Compliance Document-XXX	
Description	Compliance Document-XXX	

Step 2 of 2: Upload Files

This screenshot shows the second step of the wizard, which involves uploading files. It features a 'File | Format' section with a 'Browse...' button and a file path 'Compliance_Data.xlsx'. Below this is a 'generic' dropdown. At the bottom are 'Previous', 'Done', and 'Cancel' buttons. A blue arrow points from the 'Done' button in this window up towards the 'Step 1' window above.

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

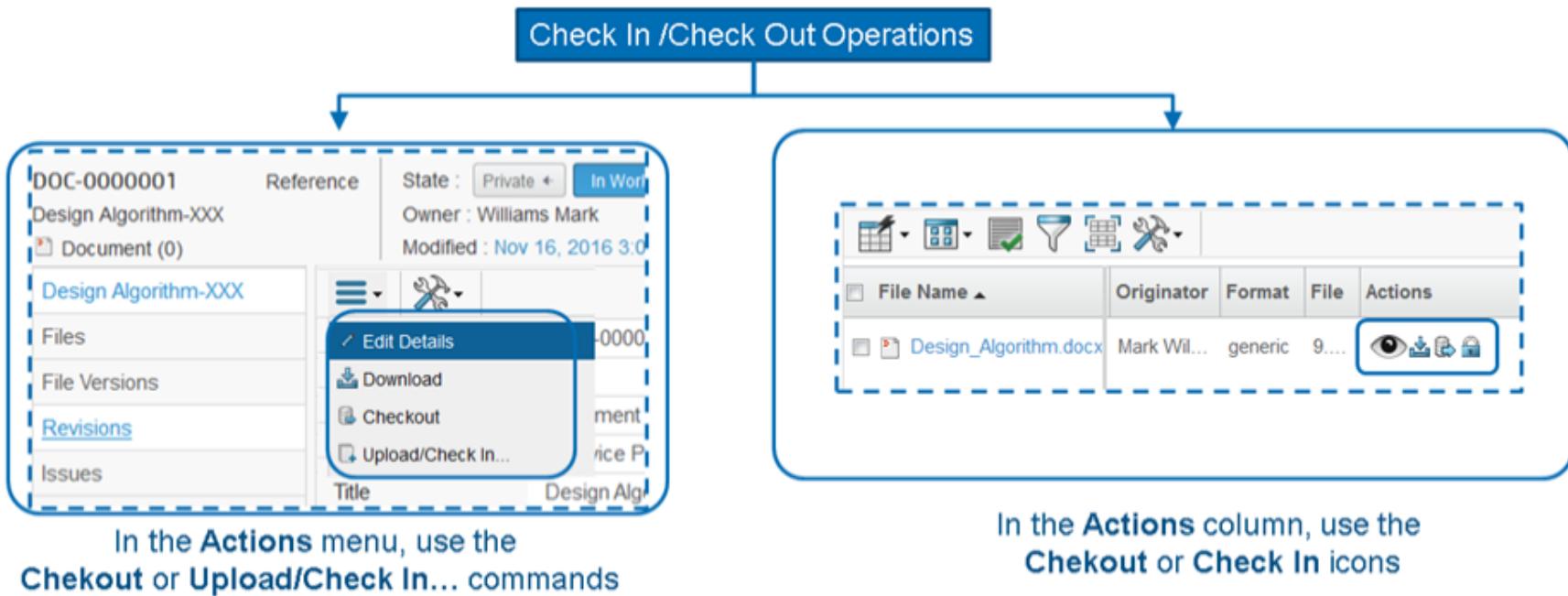
About Upload/Check In

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;



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.

The screenshot shows a software interface for managing document revisions. At the top, there are two document cards: 'Reference Document-XXX-19287...' and 'Reference Document-XXX'. Below them is a summary bar with the following information: State: Private (In Work), Owner: Williams Mark, and Modified: Nov 18, 2016 3:17:58 PM. To the right of the summary bar are several icons for document management. On the left, there is a sidebar with navigation links: Reference Document-XXX, Files, File Versions, Revisions, and Issues. The main area features a table titled 'Revisions' with the following data:

Name	Title	Revision	Description	State	Actions
Reference Document-XXX-19287720902	Reference Document-XXX	0	Reference Document-XXX	Released	
Reference Document-XXX-19287720902	Reference Document-XXX	1	Reference Document-XXX	In Work	

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.

The screenshot shows a software interface for managing documents. On the left, there is a sidebar with options: Reference Document-XXX-19287720902, Reference Document-XXX, Document (1), Reference Document-XXX, Files, File Versions, Revisions, and Issues. The 'Revisions' option is highlighted. On the right, there is a main panel with a header showing 'Reference Document-XXX' and status information: State : Private, In Work, Owner : Williams Mark, Modified : Nov 18, 2016 3:17:58 PM. Below the header is a toolbar with icons for grid, filter, and tools. A table lists 'Name' and 'Title' for two revisions. A blue arrow points from the 'Revisions' option in the sidebar to the 'Revisions' column in the table.

Name	Title
Reference Document-XXX-19287720902	Reference Document-
Reference Document-XXX-19287720902	Reference Document-

The screenshot shows a software interface for managing documents. At the top, there is a toolbar with icons for grid, filter, and tools. Below the toolbar is a table with columns: Name, Title, Revision, Description, and State. The table contains three rows of data. A blue arrow points from the 'State' column in the table to the 'State' field in the header of the main panel in the previous screenshot.

Name	Title	Revision	Description	State
Reference Document-XXX-14028278569	Reference Document-XXX	0	Reference Document-XXX	Released
Reference Document-XXX-14028278569	Reference Document-XXX	1	Reference Document-XXX	Released
Reference Document-XXX-14028278569	Reference Document-XXX	2	Reference Document-XXX	In Work

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.

The screenshot illustrates the process of revising a document. At the top right, a list of revisions for "Reference Document-XXX" is shown, with the most recent revision (version 1) highlighted. A large blue arrow points from this revision entry down to the detailed view of the document's properties at the bottom left. The properties table includes fields like Name, Revision, Type, Title, Description, State, Owner, Originated, Modified, Policy, Access Type, Classification Path(s), and a referenced file list.

Name	Title	Revis
Reference Document-XXX-19287720902	Reference Document-XXX	0
Reference Document-XXX-19287720902	Reference Document-XXX	1

Name	Revision	Type	Vault	Title	Description	State	Owner	Originated	Modified	Policy	Access Type	Classification Path(s)
Reference Document-XXX-19287720902	1	Document	eService Production	Reference Document-XXX	Reference Document-XXX	In Work	Williams Mark	Nov 18, 2016	Nov 18, 2016	Document Release	Inherited	

File Name	Ver	Or
Charting_Concepts.docx	1	No

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.

The screenshot illustrates the 'Revise with Files' process. On the left, a detailed view of a document's properties is shown, including sections like 'Where Used', 'Files', 'File Versions', 'Revisions', 'Issues', 'Routes', 'Discussions', 'Retention Schedules', 'Lifecycle', 'Multiple Ownership Access', 'History', 'Classification', 'Referenced By', and 'Images'. The 'Revisions' section shows two entries: 'Reference Document-XXX-19287720902' (Revision 1) and 'Reference Document-XXX-19287720902' (Revision 0). A blue arrow points from the 'Revised' link in the Revision 1 row to the 'Revise with Files' button in the document's toolbar. The toolbar also includes other buttons for 'Where Used', 'File Versions', 'Revisions', 'Issues', and 'Referenced By'.

Name	Title	Revis
Reference Document-XXX-19287720902	Reference Document-XXX	0
Reference Document-XXX-19287720902	Reference Document-XXX	1

File Name	Ver	Or
Charting_Concepts.docx	1	No

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.

The screenshot shows a software interface for managing document access rights. At the top, there are tabs for 'Reference Document-XXX-19287...' and 'Reference Document-XXX'. Below the tabs, the document details are displayed: State (Private, In Work, * Frozen), Owner (Williams Mark), and Modified (Nov 18, 2016 3:17:58 PM). To the right of these details are various icons for file operations like copy, move, delete, and search. A button labeled 'XXX-PrivateCS' is also present. On the left side, a sidebar lists navigation options: Reference Document-XXX, Files, File Versions, Revisions, Issues, Routes, Discussions, Lifecycle, History, Multiple Ownership Access, and Images. The main area features a table titled 'Access Rights' with columns: Organization, Collaborative Space/User, Access, Inherited From, Inherited Access, and Comments. The table contains several rows of data, with the last row being highlighted in light blue. The data in the table is as follows:

Organization	Collaborative Space/User	Access	Inherited From	Inherited Access	Comments
	Alice Fey	Read Write	Folder Data Analysis-...	Read Write	Multiple Owners!
	Taylor Anne	Read Write	Folder Data Analysis-...	Read Write	Multiple Owners!
	Glover Bronn	Add Remove	Folder Data Analysis-...	Add Remove	Multiple Owners!
	Williams Mark	Full	Folder Data Analysis-...	Full	Multiple Owners!
MyCompany	XXX-PrivateCS	All	Folder Charting_Con...	All All	Primary

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.

Charting_Concepts-XXX

Charting_Concepts-XXX

State : Exists

Owner : Mark-XXX

Modified : 10/13/2015 3:0

Actions More Actions

Name	Title
Compliance Document-XX	Compli
Reference Document-XX	Refere

Ver	File Name	Originated
1	RoHS_Details.pptx	Oct 8, 2015 7:1
2	RoHS_Details.pptx	Oct 9, 2015 2:3
1	Compliance_Data.xlsx	Oct 8, 2015 5:4
2	Compliance_Data.xlsx	Oct 9, 2015 12
3	Compliance_Data.xlsx	Oct 9, 2015 2:3

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

A-0000100-01 rev A : Subscription

Type
Event
Person
Person
Event
Person
Person

3DEXPERIENCE | ENOVIA Collaboration and Approvals

Home

New Docs >

Name Title Action

3D Mercha /home/data/RTV/3DEx...

Change Management

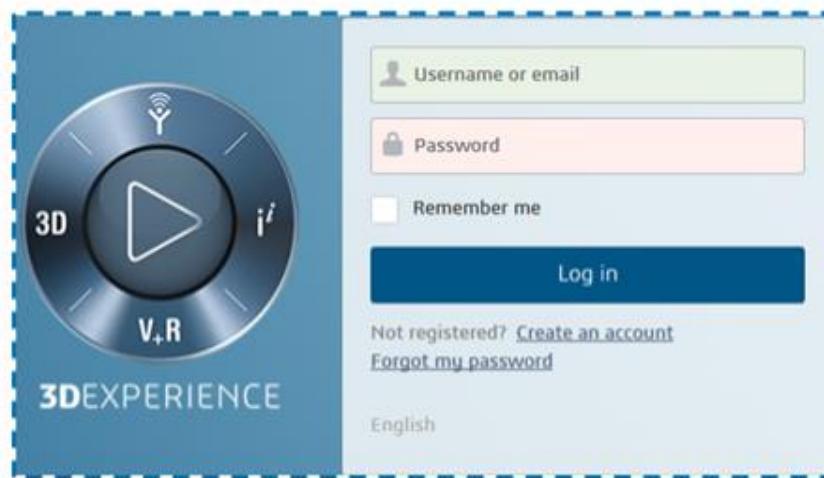
- My Changes
- Collaboration and Approvals
- Home
- Issues Summary
- Shortcuts...
- Collections
- Utilities
- Routes
- Tasks
- Subscriptions



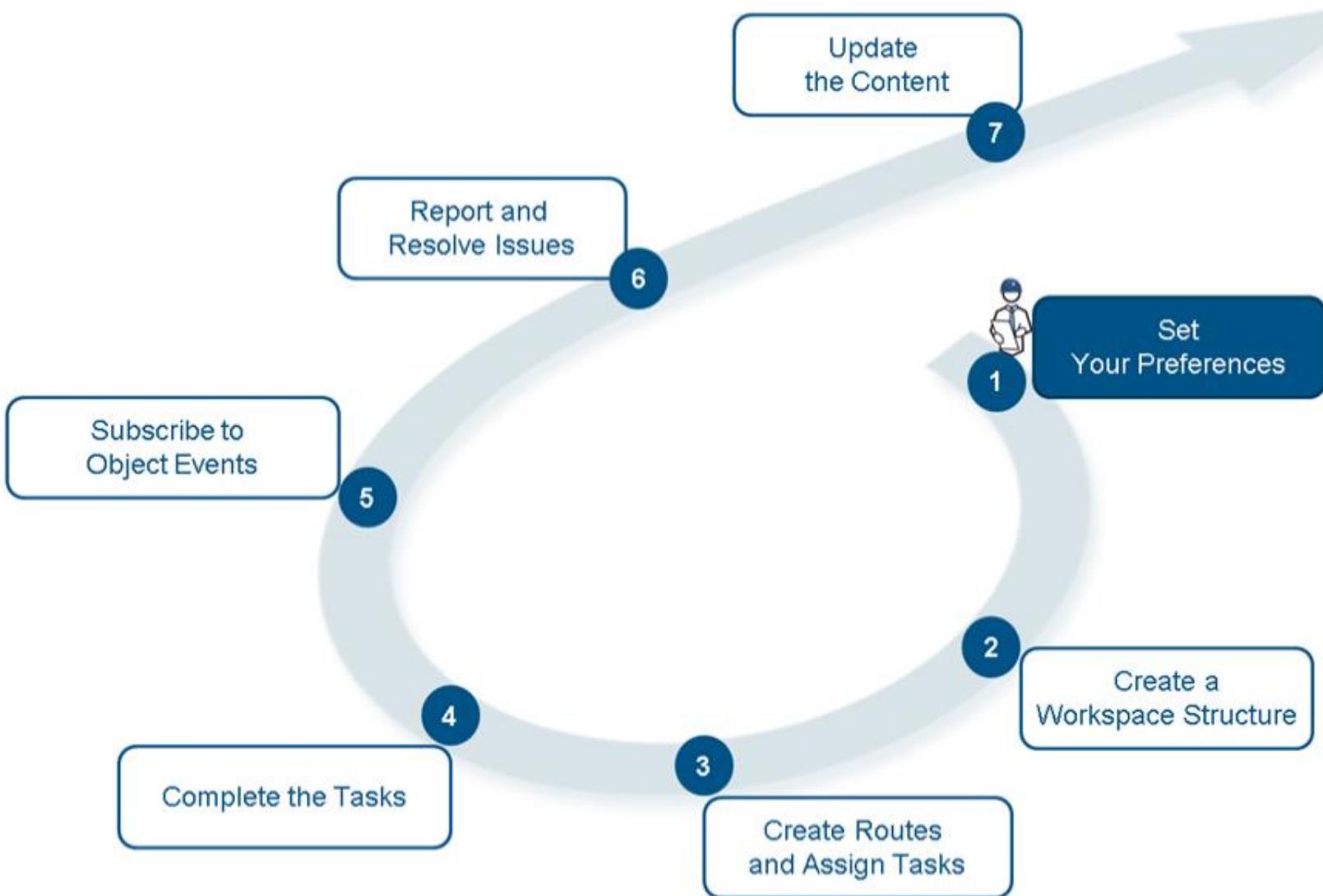
4 hours

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.



Exercise Progression



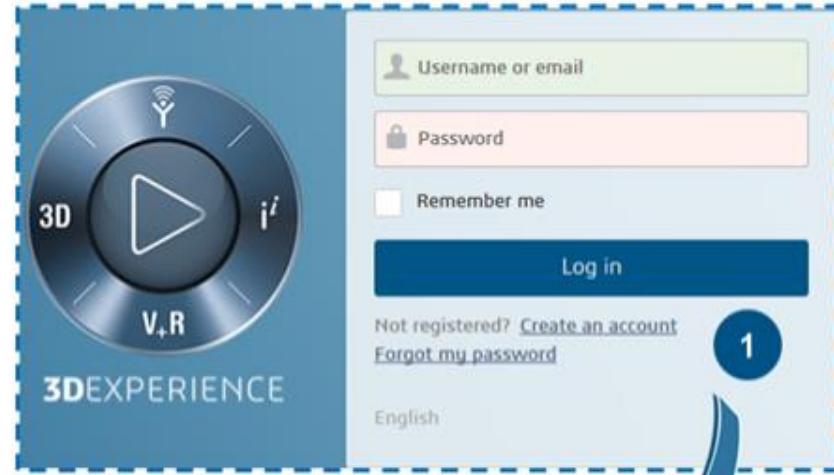
Download the Course Data

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 3DEXPERIENCE platform with the following credentials:
 - a. Username or email: [Mark-XXX]
 - b. Password: [Mark-XXX]



The screenshot shows the 3DEXPERIENCE ENOVIA Collaboration and Approvals interface. At the top, there's a navigation bar with the 3DEXPERIENCE logo, a search bar, and links for 'Home', 'New Docs', 'Changed Docs', and 'My Recent Docs'. On the left is a sidebar with a navigation tree: 'Change Management' (My Changes), 'Collaboration and Approvals' (Home, Issues Summary, Shortcuts...), 'Collections', 'Utilities', 'Routes', and 'Tasks'. The main content area is titled 'Home' and shows a grid of document thumbnails. One thumbnail for a file named '3D Mercha...' is selected. The interface uses a light blue and white color scheme with some dark blue accents for buttons and links.

Save Your Favorite App

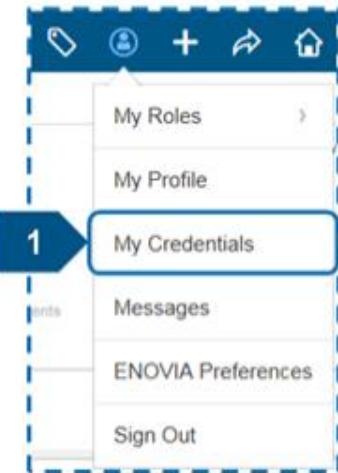
You can save the app that you use most, using the following steps:

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**.



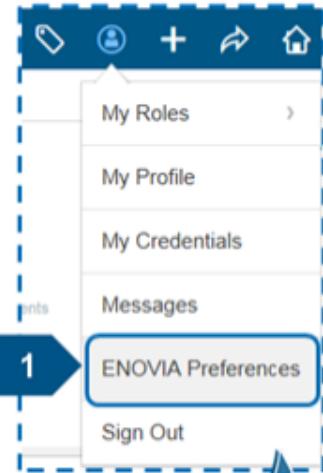
2. Specify the following set of values for the security context, and click **OK**:

- a. **Collaborative Space:** XXX-PrivateCS
- b. **Role:** Leader

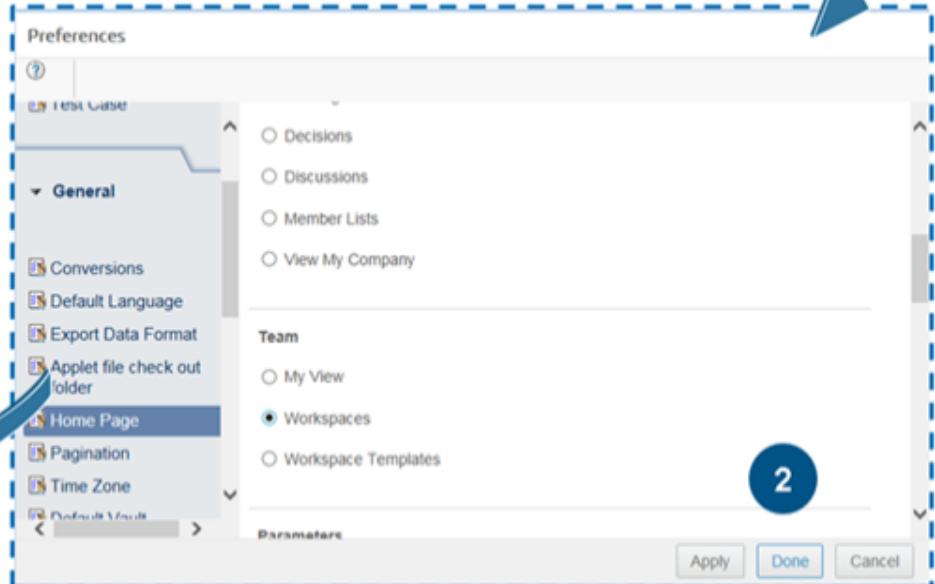
A screenshot of a 'Select Credentials' dialog box. The title bar says 'Select Credentials:' with a blue circle containing the number '2' in the top right corner. The dialog contains three input fields: 'Organization' with a 'Company Name' placeholder, 'Collaborative Space' with a dropdown menu showing 'XXX-PrivateCS', and 'Role' with a dropdown menu showing 'Leader'. At the bottom right of the dialog are two buttons: 'OK' and 'Cancel'.

Set Your Home Page

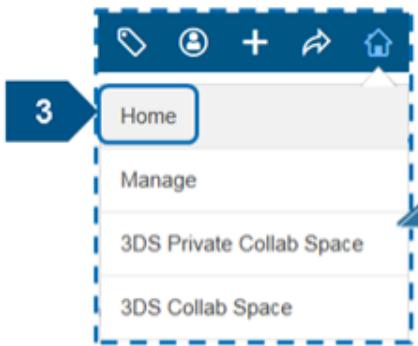
1. In the top bar, select **Me > ENOVIA Preferences**.



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

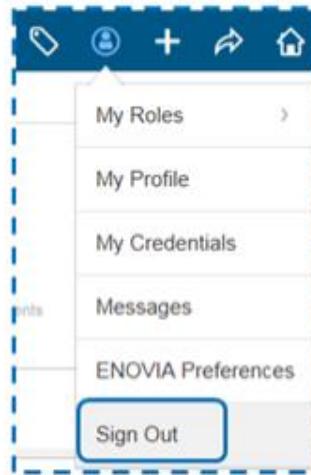


3. In the top bar, select **Home > Home**, to view your selected home page.



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

The screenshot shows a workspace structure interface. At the top, there is a header bar with a dashed border containing the following information:

- A placeholder box labeled "Drop images here".
- The workspace name: "Data Analysis-XXX".
- The workspace description: "Folder (0000000002)".
- The workspace purpose: "Workspace for data analysis".
- The workspace owner: "Owner : Williams Mark".
- The workspace modification date: "Modified : Nov 16, 2016 4:57:55 PM".

Below the header is a toolbar with various icons. The main area displays a tree view of the workspace structure:

- The root folder is "Data Analysis-XXX".
- It contains three subfolders:
 - "Charting_Concept"
 - "Design_Analysis_..." (with an ellipsis)
 - "Process_Checklist..." (with an ellipsis)

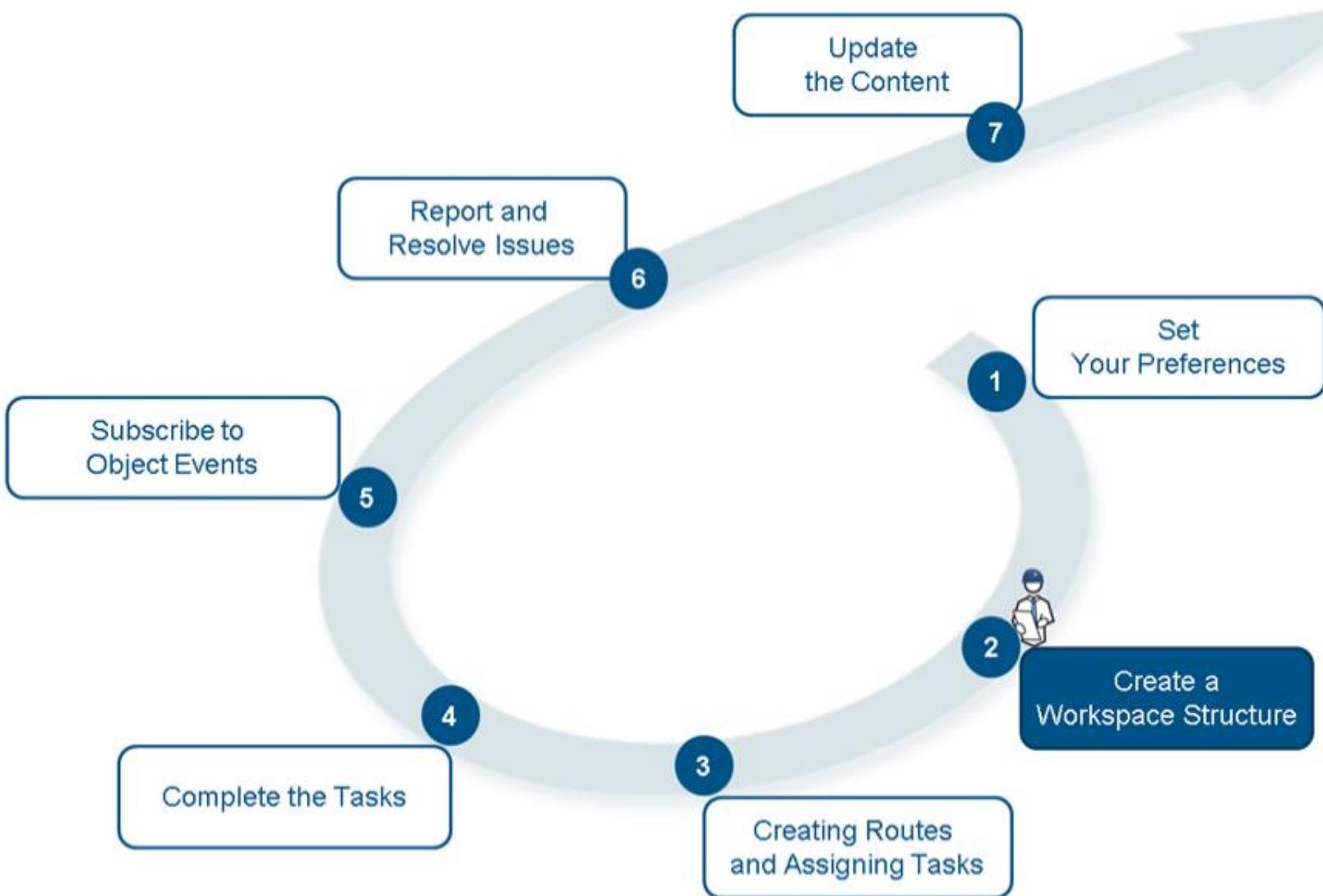
On the right side of the interface, there is a search bar labeled "Name" and a list of results:

- "Charting_Concepts-XXX"
- "Design_Analysis_Algorithm-XXX"
- "Process_Checklist-XXX"



45 minutes

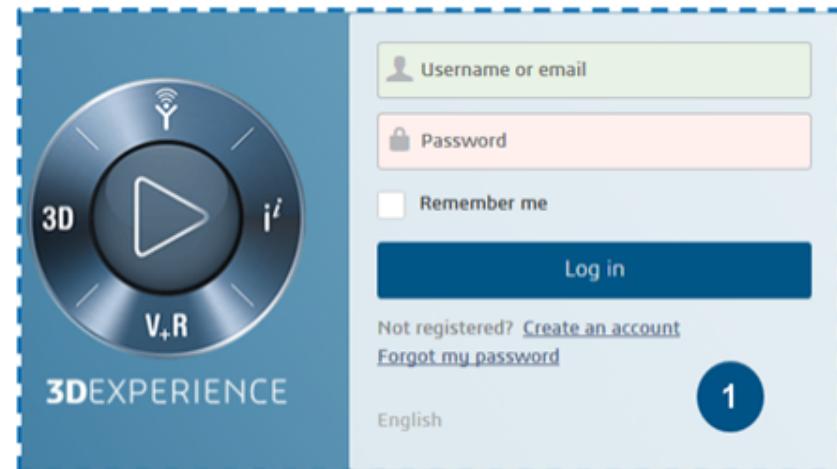
Exercise Progression



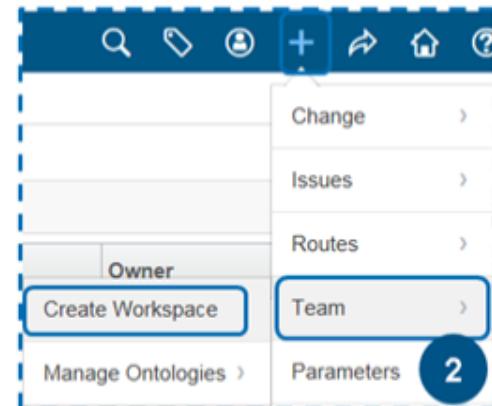
Create a Workspace (1/2)

1. Log in to the 3DEXPERIENCE 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]

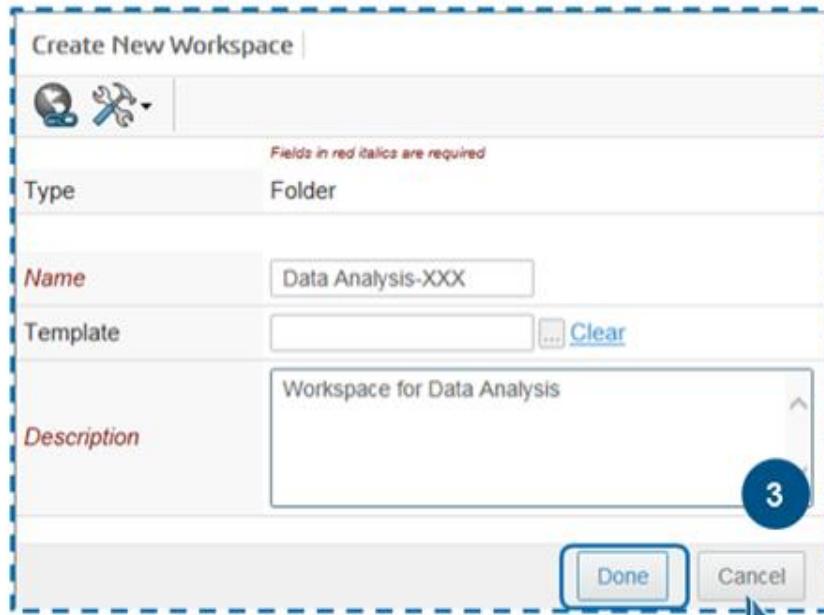
Create New Workspace

Fields in red italics are required

Type	Folder
Name	Data Analysis-XXX
Template	<input type="text"/> Clear
Description	Workspace for Data Analysis

3

Done **Cancel**

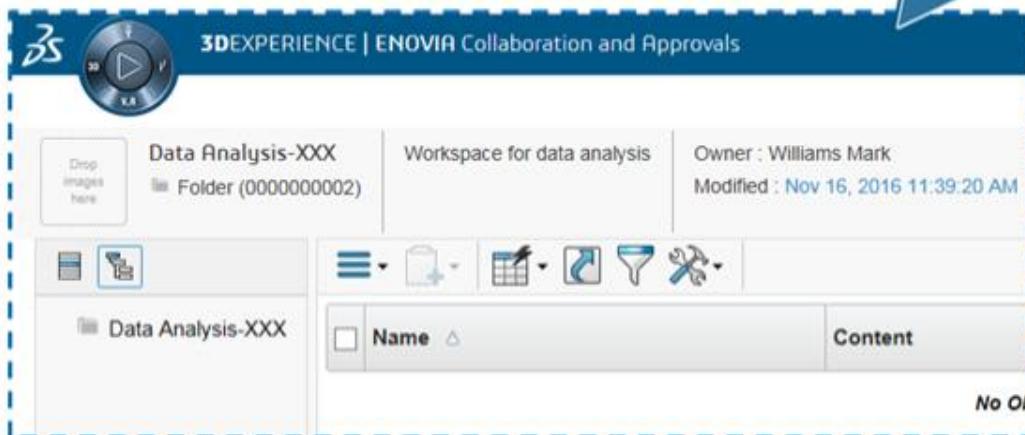


By default the workspace is in the **Create** state.

3DEXPERIENCE | ENOVIA Collaboration and Approvals

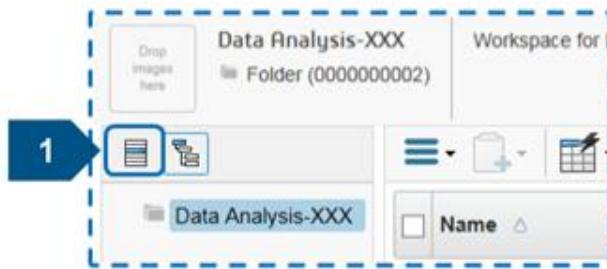
DS

Drop images here	Data Analysis-XXX └ Folder (0000000002)	Workspace for data analysis	Owner : Williams Mark Modified : Nov 16, 2016 11:39:20 AM				
Data Analysis-XXX		Content					
<table border="1"><thead><tr><th>Name</th><th>Content</th></tr></thead><tbody><tr><td>No O</td><td></td></tr></tbody></table>		Name	Content	No O			
Name	Content						
No O							

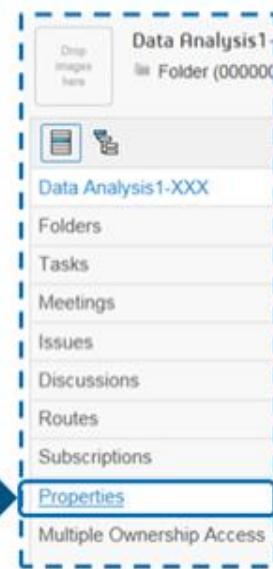


Promote the Workspace to an Active State (1/2)

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.

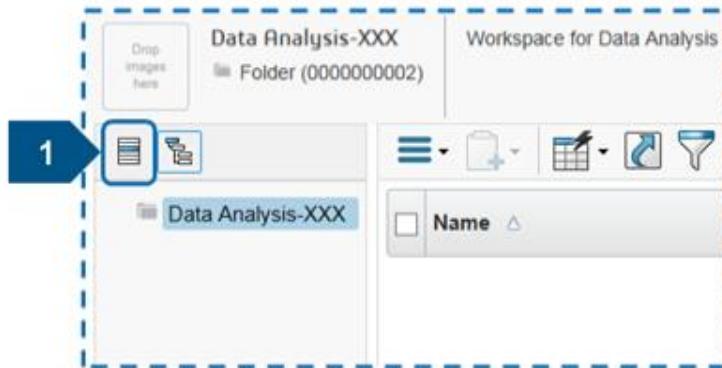
A screenshot of a workspace properties page. On the left, there is a sidebar with various tabs: Data Analysis-XXX, Folders, Tasks, Meetings, Issues, Discussions, Routes, Subscriptions, Properties (which is currently selected), and Multiple Ownership Access. On the right, the workspace details are listed in a table:

Name	Data Analysis-XXX
Template	Template_001-XXX
Image	(empty)
Owner	Williams Mark
State	Active
Originated	Nov 16, 2016
Buyer Desk	(empty)
Description	Workspace for data analysis

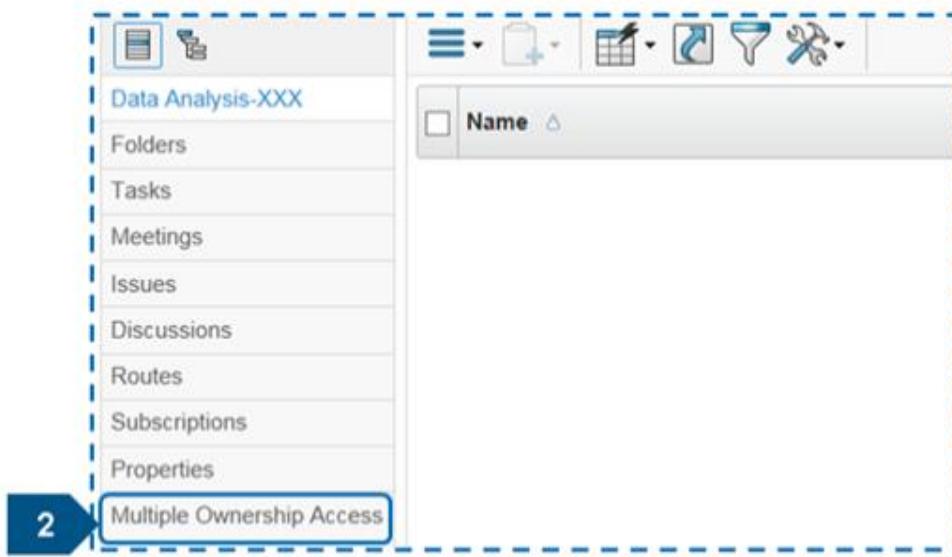
The "State" row is highlighted with a blue border. A large dashed blue rectangle surrounds the entire properties section.

Add Members to the Workspace (1/5)

1. Click the **Categories** icon.

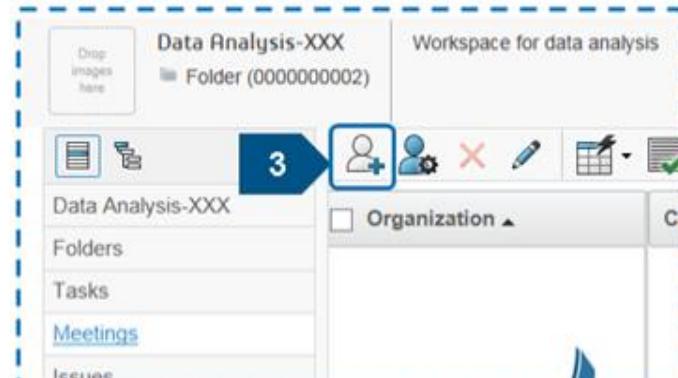


2. In the category tree, select **Multiple Ownership Access**.



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.

The screenshot shows the workspace content area with a dashed blue border. At the top, there is a search bar with a checkmark icon, the text "317 Results Last index:-----", and a "Search my recent content" button. Below the search bar are six cards representing different users or files. Each card has a small profile icon, the user's name, and a timestamp. The cards are arranged in two rows of three. The bottom row is partially visible. To the right of the cards is a toolbar with icons for file operations like copy, print, and star, followed by a "View" icon (highlighted with a blue arrow labeled '4').

User	Last Indexed
Student-XXX	11/16/2016 3:37:59 PM
Student-MUNZING	11/15/2016 4:57:04 PM
Student-WADE	11/14/2016 10:27:54 PM
kbp	11/14/2016 7:45:10 PM
Erik-XXX	11/14/2016 5:00:13 PM
Xavier-VILAS	11/12/2016 12:27:52 PM

Add Members to the Workspace (3/5)

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

The screenshot shows a search interface with a blue header bar. The header contains icons for search, refresh, user profile, and other functions. A large blue arrow points from the number 5 in the list above to the search icon in the header. Below the header is a search results table with 314 entries. The table columns include Actions, Title, Description, Name, Modification Date, Creation Date, Type, and Responsible. The results show various entries like 'Student-XXX', 'Student-MUN...', 'Student-WADE', etc., all categorized as Person. At the bottom right of the search results table are 'OK' and 'Cancel' buttons. To the right of the table is a vertical scroll bar. A large blue arrow points from the bottom of the search results table towards a dropdown menu. This dropdown menu is titled with a search input field containing a placeholder 'Search my recent content'. It lists several suggestions: 'Anne-XXX, Alice-XXX, Bronn-X', 'Anne-XXX', 'Anne Taylor', 'Member_List:XXX*', 'Search', 'My content', and 'Advanced Search'. The 'Advanced Search' option is highlighted with a red box.

	Actions	Title	Description	Name	Modification D...	Creation Date	Type	Responsible
1	<input type="checkbox"/>	Student-XXX		Student-XXX	11/16/2016 3...	11/12/2016 1...	Person	
2	<input type="checkbox"/>	Student-MUN...		Student-MUN...	11/15/2016 4...	11/12/2016 1...	Person	
3	<input type="checkbox"/>	Student-WADE		Student-WADE	11/14/2016 1...	11/12/2016 1...	Person	
4	<input type="checkbox"/>	kbp		kbp	11/14/2016 7...	11/12/2016 1...	Person	
5	<input type="checkbox"/>	Erik-XXX		Erik-XXX	11/14/2016 5...	11/12/2016 1...	Person	
6	<input type="checkbox"/>	Xavier-VILAS		Xavier-VILAS	11/12/2016 1...	11/12/2016 1...	Person	

OK Cancel

Search my recent content

Anne-XXX, Alice-XXX, Bronn-X

Anne-XXX

Anne Taylor

Member_List:XXX*

Search

My content

Advanced Search

Add Members to the Workspace (4/5)

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

6WTags Advanced Search

Full Text Field

"XXX" X |

Data Source

Select a source to list types

Type

No type for selected source

Extension

No subtype for selected type

Title

Enter text

Name

Enter text

Modification Date

From To

More Criteria [3]

Search

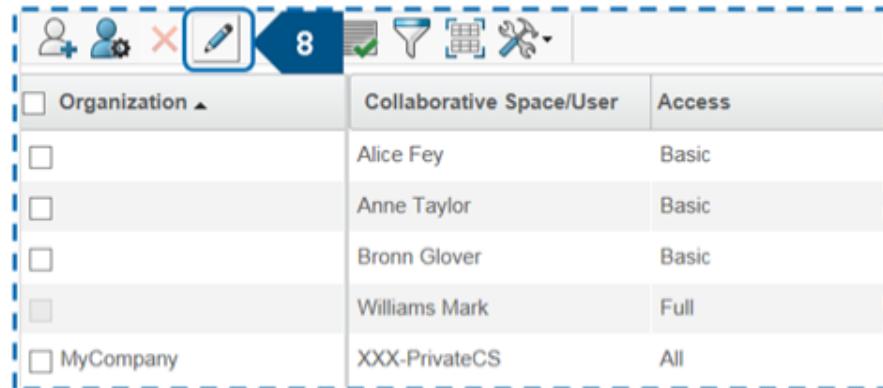
7. Select the persons as shown and click OK.

	Actions	Name	Email Address	Work Phone Number
1	<input type="checkbox"/>	Mark-XXX	Mark-XXX@3DS.COM	
2	<input type="checkbox"/>	Data Analysis-XXX		
3	<input type="checkbox"/>	Student-XXX	XXX@3dp.com	
4	<input type="checkbox"/>	Erik-XXX	Erik-XXX@3DS.COM	
5	<input type="checkbox"/>	Xavier-XXX	Xavier-XXX@3DS.COM	
6	<input type="checkbox"/>	Victor-XXX	Victor-XXX@3DS.COM	
7	<input type="checkbox"/>	Dolores-XXX	Dolores-XXX@3DS.COM	
8	<input checked="" type="checkbox"/>	Anne-XXX	Anne-XXX@3DS.COM	
9	<input type="checkbox"/>	Elise-XXX	Elise-XXX@3DS.COM	
10	<input type="checkbox"/>	Xin-XXX	Xin-XXX@3DS.COM	
11	<input checked="" type="checkbox"/>	Bronn-XXX	Bronn-XXX@3DS.COM	
12	<input checked="" type="checkbox"/>	Alice-XXX	Alice-XXX@3DS.COM	

OK Cancel

Add Members to the Workspace (5/5)

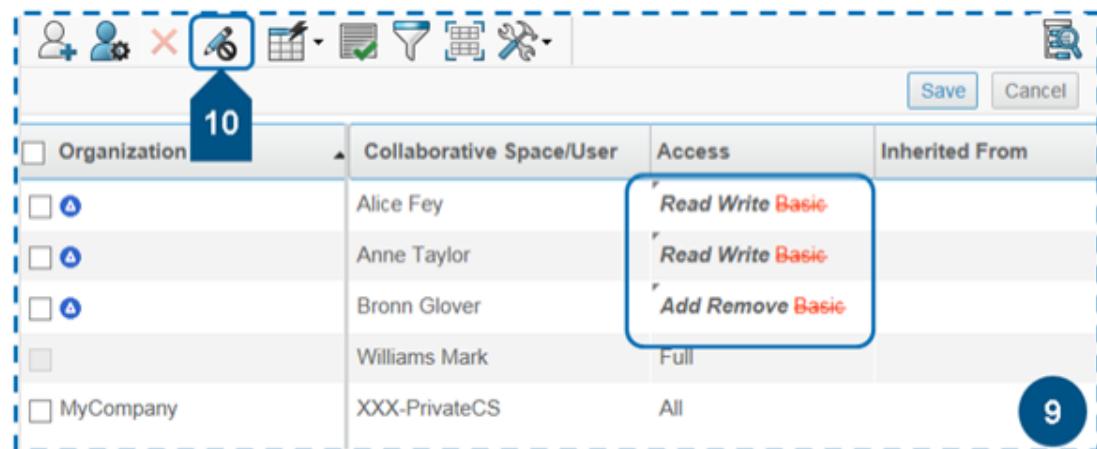
8. In the page toolbar, click **Enable Edit** to modify the member accesses.



A screenshot of a web-based application interface showing a list of members in a workspace. The interface includes a toolbar at the top with various icons, some of which are highlighted with blue boxes and numbered 8 and 10. The main area is a table with columns for 'Collaborative Space/User' and 'Access'. The data rows are:

Collaborative Space/User	Access
Alice Fey	Basic
Anne Taylor	Basic
Bronn Glover	Basic
Williams Mark	Full
MyCompany	All

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



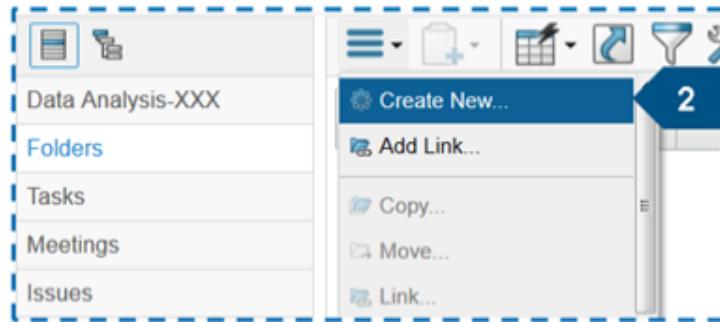
A screenshot of the same workspace member access list, but now in edit mode. The 'Edit' icon in the toolbar is highlighted with a blue box and labeled 10. A callout bubble highlights the 'Access' column for the first three users (Alice Fey, Anne Taylor, Bronn Glover), which now show 'Read Write Basic' instead of 'Basic'. The 'Save' button is visible in the top right corner. The data rows are identical to the previous screenshot.

Collaborative Space/User	Access	Inherited From
Alice Fey	Read Write Basic	
Anne Taylor	Read Write Basic	
Bronn Glover	Read Write Basic	
Williams Mark	Full	
MyCompany	All	

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

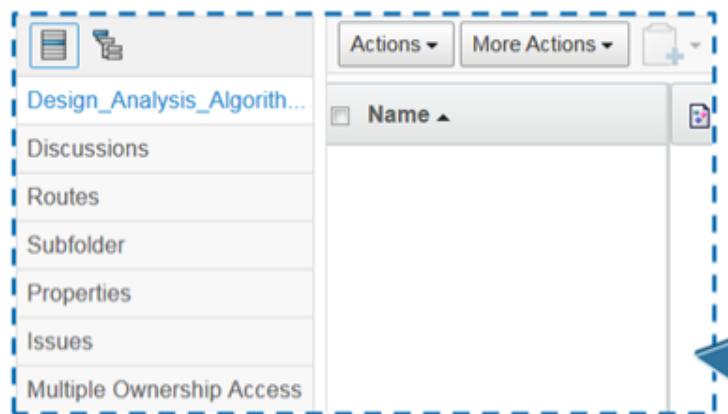
Add Folders to the Workspace (1/2)

1. In the category tree, select **Folders**.
2. In the page toolbar, select **Actions > Create New...**



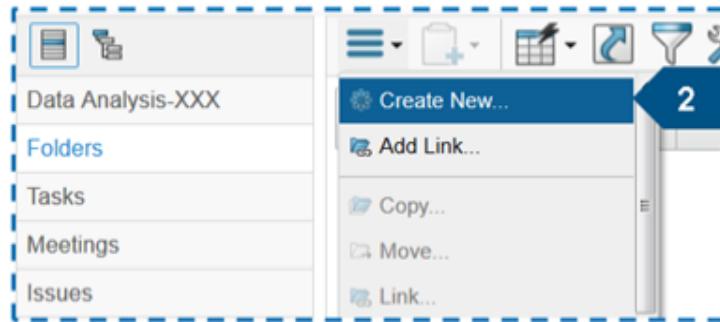
3. Specify the following details, and click **Done**:
 - a. **Name:** [Design_Analysis_Algorithm-XXX]
 - b. **Description:** [This folder contains the algorithm for design analysis]
 - c. **Inherit Access:** Yes

The screenshot shows a 'Create New...' dialog box for a folder named 'Analysis_Algorithm-XXX'. The dialog includes fields for 'Name', 'Description', 'Inherit Access' (set to 'Yes'), and 'Publish On Connect' (set to 'False'). A large blue arrow points from the 'Name' field in the list view on the left to the 'Name' field in the dialog box on the right. A small number '3' is in the bottom right corner of the dialog box.



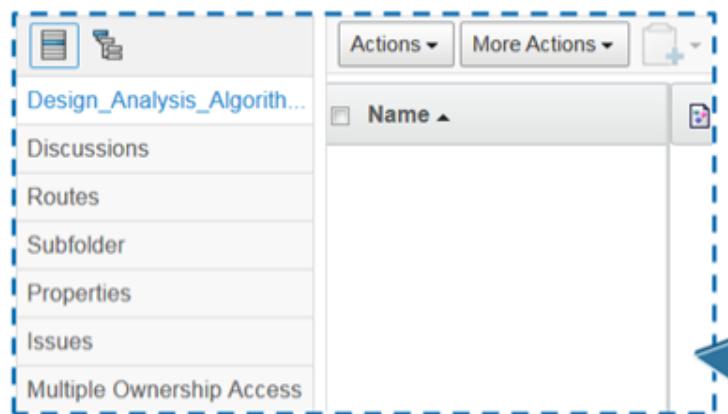
Add Folders to the Workspace (1/2)

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

The screenshot shows a 'Create New...' dialog for a folder named 'Analysis_Algorithm-XXX'. The dialog includes fields for 'Name', 'Description', 'Inherit Access' (set to 'Yes'), and 'Publish On Connect' (set to 'False'). A large blue arrow points from the 'Name' field in the list view on the left to the 'Name' field in the dialog box on the right. A small number '3' is in the bottom right corner of the dialog.



Add Folders to the Workspace (2/2)

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



- Add two more folders with the following details:

- Folder 1:

- Name and Description: [Process_Checklist-XXX]
- Inherit Access: Yes

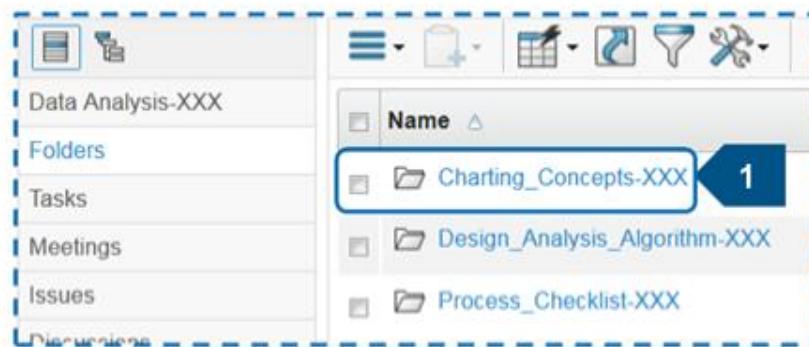
- Folder 2:

- Name and Description: [Charting_Concepts-XXX]
- Inherit Access: Yes

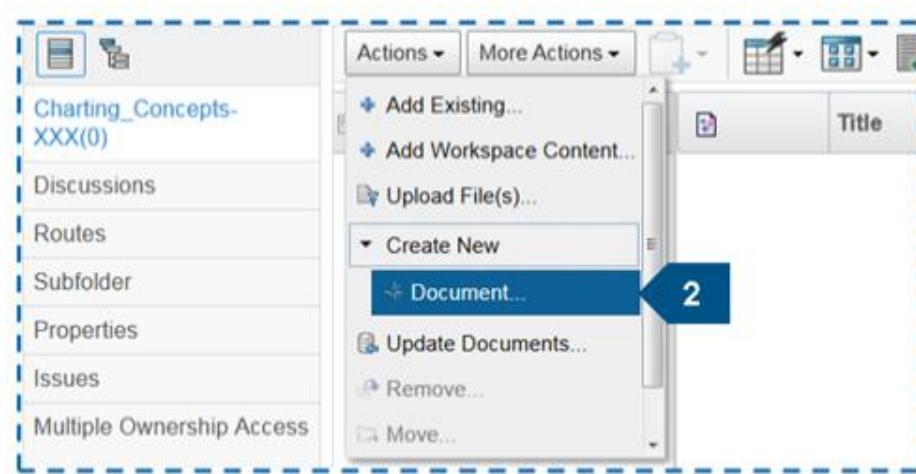
A screenshot of the Data Analysis-XXX workspace interface. The top header shows the workspace name, owner (Williams Mark), and creation date (Nov 16, 2016). On the left, there's a sidebar with 'Drop images here' and links for Folders, Tasks, Meetings, Issues, and Discussions. The main area has tabs for Folders, Tasks, Meetings, Issues, and Discussions. Under the Folders tab, a list shows three new folders: 'Charting_Concepts-XXX', 'Design_Analysis_Algorithm-XXX', and 'Process_Checklist-XXX'. The 'Process_Checklist-XXX' folder is highlighted with a red rounded rectangle.

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]

Step 1 of 2:Specify Details



Fields in red *italics* are required.

Name

ference Document-XXX AutoName

Type

Document

Policy

Document Release

Title

Reference Document-XXX

Description

3

Next

Cancel

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

Charting_Concepts-XXX

Folder (AC0CAE563...)

Owner : Williams Mark

Modified : Nov 16, 2016 2:46:46 PM

Drop files here

Re



- Data Analysis-XXX
- + Charting_Concept
- + Design_Analysis_
- + Process_Checklist

Actions

More Actions



Name

Reference Document-XXX-19287720902

Step 2 of 2: Upload Files



File | Format

Comments

Browse... Charting_Concepts.docx

generic

4

Previous

Done

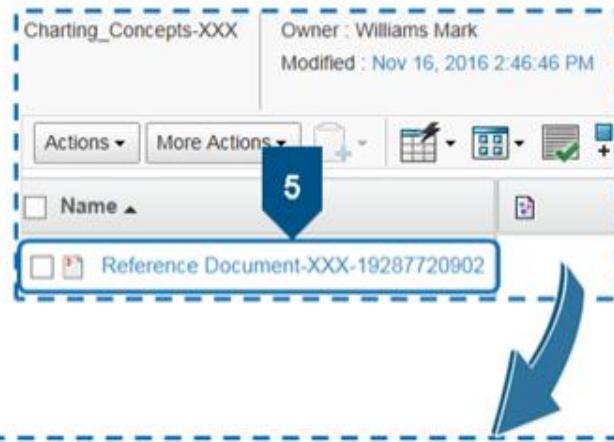
Cancel

Add Content to Folders (3/4)

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

Observe that the file is attached to the document.

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



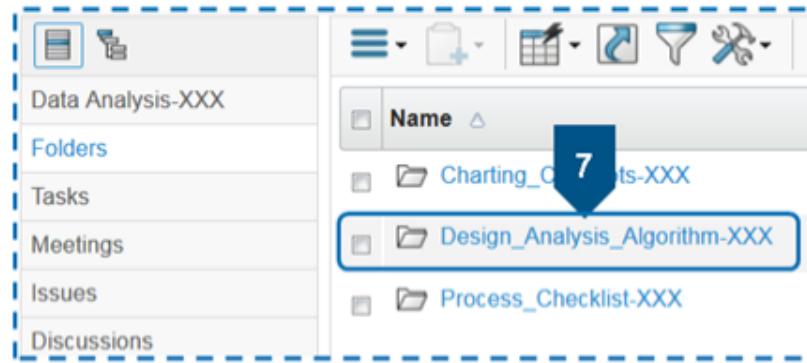
A screenshot of the workspace showing the details for the document 'Reference Document-XXX-19287720902'. The left sidebar lists navigation options: Files, File Versions, Revisions, Issues, Routes, Discussions, Lifecycle, History, Multiple Ownership Access, and Images. The main area displays the document's properties in a table:

Name	Reference Document-XXX-19287720902
Revision	0
Type	Document
Vault	eService Production
Title	Reference Document-XXX
Description	Reference Document-XXX
State	In Work
Owner	Williams Mark
Originated	Nov 16, 2016
Modified	Nov 16, 2016
Policy	Document Release
Access Type	Inherited
Classification Path (s)	

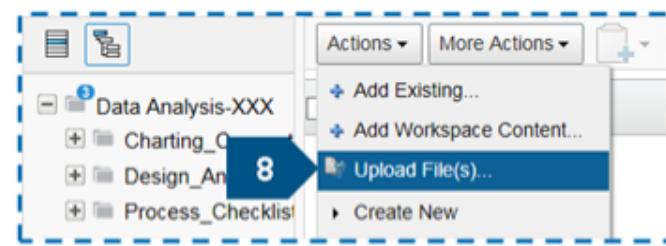
Below the properties table is another toolbar with various icons. At the bottom, there's a table with columns: File Name, Ver, Originated, and Com. The first row of this table shows the file name 'Charting_Concepts.docx', version 1, originated on Nov 16, 2016, and a partially visible 'Com' column.

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:

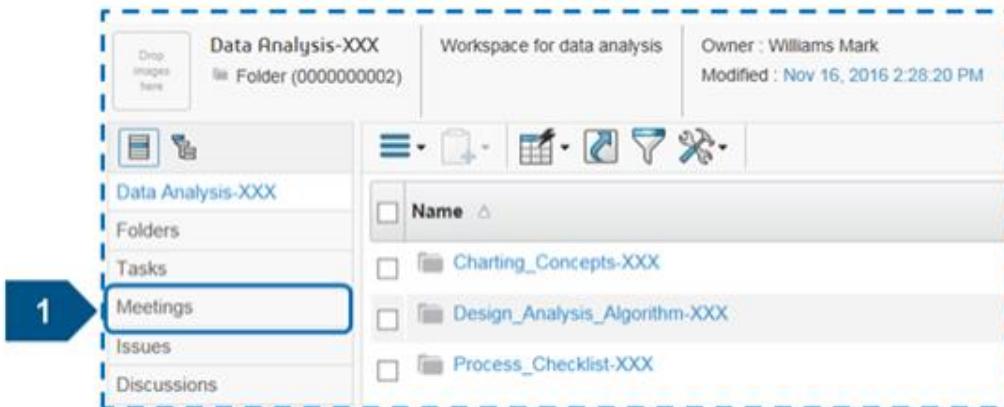
- Title: [Design Algorithm-XXX]
- Description: [Reference]

The screenshot shows the 'Upload Files To Individual Documents' dialog box. It contains a table with a single row for 'Design_Algorithm.docx'. The 'Title' column is set to 'Design Algorithm-XXX' and the 'Description' column is set to 'Reference'. At the bottom right, there are 'Done' and 'Cancel' buttons, with a blue arrow labeled '9' pointing to the 'Done' button.

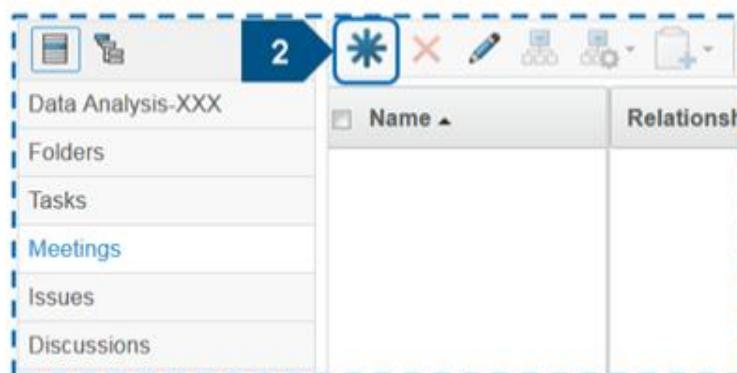
File Format	Title	Description
Browse... Design_Algorithm.docx generic	Design Algorithm-XXX	Reference

Create a Meeting (1/2)

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



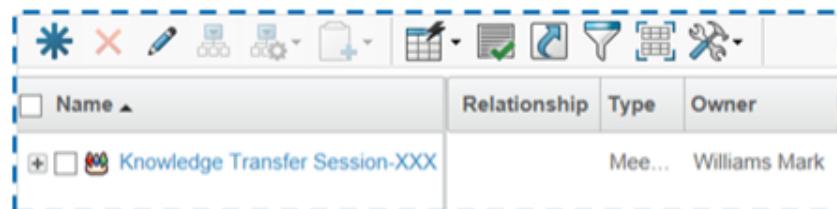
2. In the page toolbar, click **Create New**.



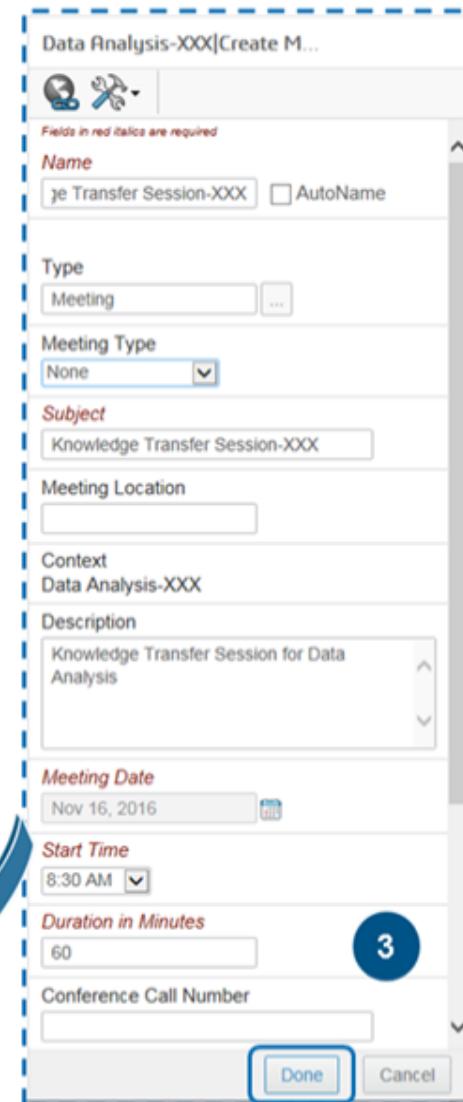
Create a Meeting (2/2)

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]



The screenshot shows the Dynamics CRM ribbon toolbar at the top of a form. A dashed blue box highlights the 'New' button (represented by a blue asterisk icon). Below the toolbar is a table with four columns: 'Name', 'Relationship', 'Type', and 'Owner'. The 'Name' column contains the value 'Knowledge Transfer Session-XXX'. The 'Type' column shows 'Meeting'. The 'Owner' column shows 'Williams Mark'.



The screenshot shows the 'Data Analysis-XXX|Create M...' dialog box. It contains fields for Name, Type, Meeting Type, Subject, Meeting Location, Context, Description, Meeting Date, Start Time, Duration in Minutes, Conference Call Number, and two buttons at the bottom: 'Done' and 'Cancel'. A large blue arrow points from the 'Done' button in the dialog box towards the 'New' button on the ribbon toolbar. A blue circle with the number '3' is located in the bottom right corner of the dialog box area.

Add Attendees to the Meeting (1/2)

1. Click the meeting's name.

The screenshot shows a workspace interface with a dashed blue border. Inside, there is a sidebar on the left with categories: Data Analysis-XXX (highlighted), Folders, Tasks, Meetings (selected), and Issues. The main area displays the title 'Data Analysis-XXX', a folder icon, and the text 'Workspace for data analysis'. On the right, there is a toolbar with various icons and a table header for 'Name', 'Relationship', and 'Type'. A blue arrow labeled '1' points to the meeting name 'Knowledge Transfer Session-XXX' in the table.

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

The screenshot shows a detailed view of the 'Knowledge Transfer Session-XXX' meeting. It includes sections for 'Knowledge Transfer Session...', 'Meeting', 'Agenda Items', 'Attachments', and 'Decisions'. A blue arrow labeled '2' points to the 'Attendees' tab, which is highlighted with a red border. To the right, there is a properties panel with fields like Type (Meeting), Meeting Type (None), Subject (Knowledge Transfer), Meeting Location, and Context (Data Analysis-XXX).

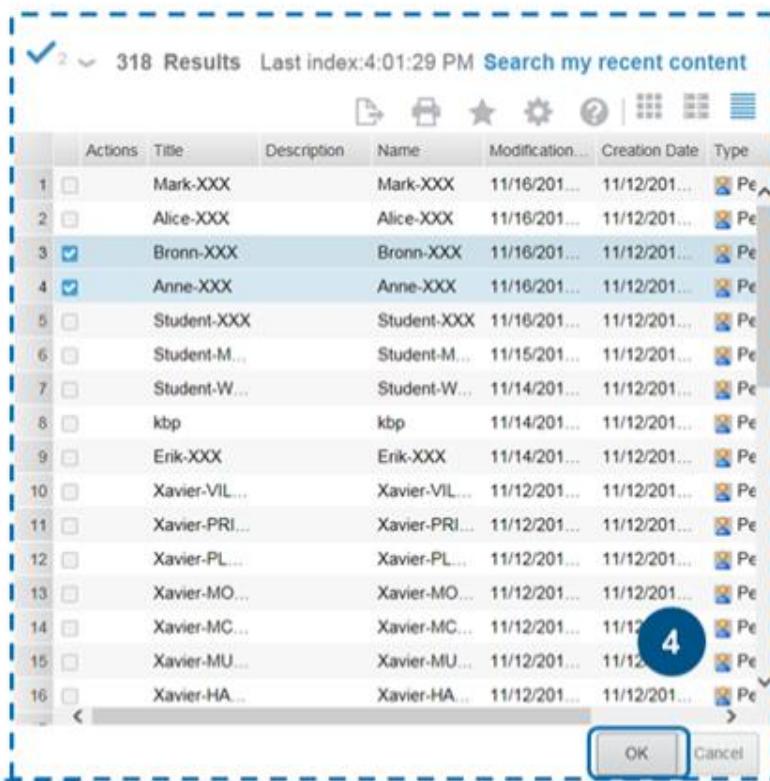
3. In the page toolbar, select **Add Attendee**.

The screenshot shows the workspace interface again with a dashed blue border. The sidebar on the left has 'Attendees' selected. The main area features a table with columns for 'Name' and 'Work'. A blue arrow labeled '3' points to the 'Add' button (a blue plus sign) in the toolbar above the table. The table currently shows one row for 'Mark-XXX'.

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.



Knowledge Transfer Session-...

Knowledge Transfer Session-XXX

Meeting

Knowledge Transfer Sess...

Agenda Items

Attachments

Attendees

Decisions

Lifecycle

History

	Name	Work Email Address	Company
<input type="checkbox"/>	Anne-XXX	Anne-XXX@3...	MyCompany
<input type="checkbox"/>	Bronn-XXX	Bronn-XXX@...	MyCompany
<input type="checkbox"/>	Mark-XXX	Mark-XXX@3...	MyCompany

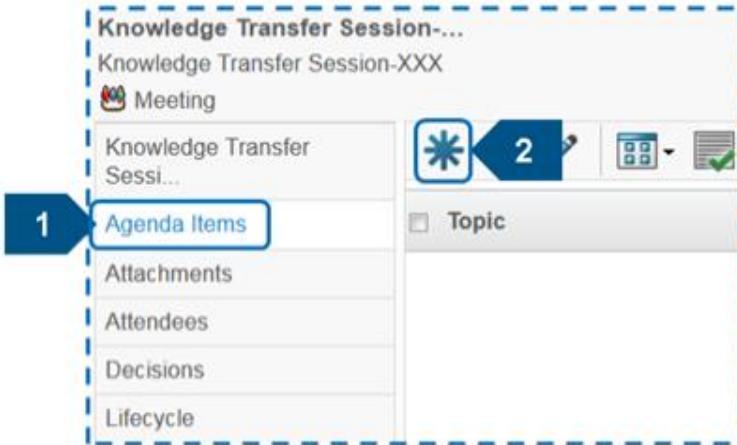
OK Cancel

Add an Agenda Item for the Meeting

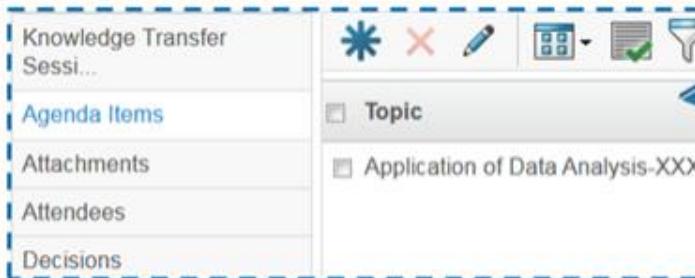
1. In the category tree, select **Agenda Items**.
2. In the page toolbar, click **Create New Agenda Item**.

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]

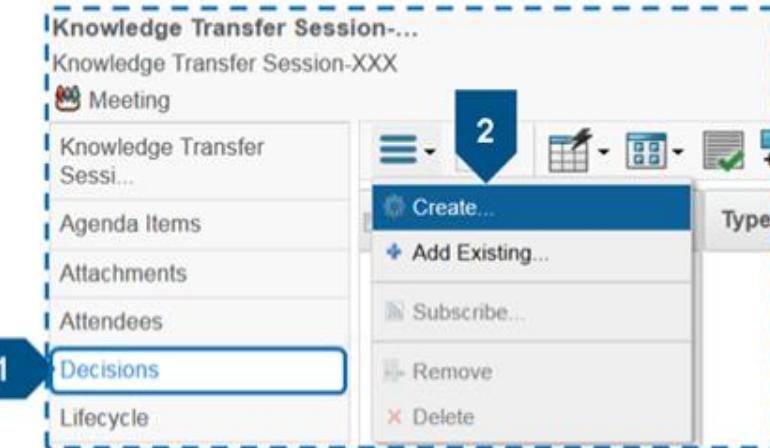


A screenshot of the 'Create Agenda Item' dialog box. It contains fields for 'Topic' (set to 'Application of Data Analysis-XXX'), 'Topic Item(s)' (empty), 'Responsible Person' (set to 'Anne Taylor'), 'Duration in Minutes' (set to '20'), and 'Sequence Number' (set to '1'). A note at the top right says 'Fields in red italics are required'. A blue arrow labeled '3' points from the 'Topic' field in the dialog to the 'Topic' field in the category tree below. The 'Done' button is visible in the bottom right corner of the dialog.



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]

The screenshot shows a 'Create Decis...' dialog box with the following fields:

Type	Decision
Name	<input checked="" type="checkbox"/> AutoName
Vault	eService Production
Title	(empty)
Description	All the attendees must be present for the meeting
Owner	Mark Williams
Track Applicability	No

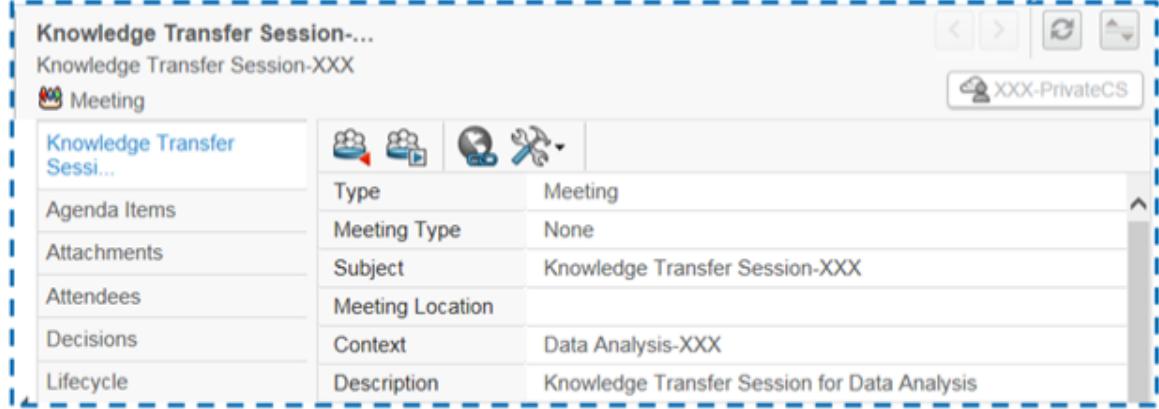
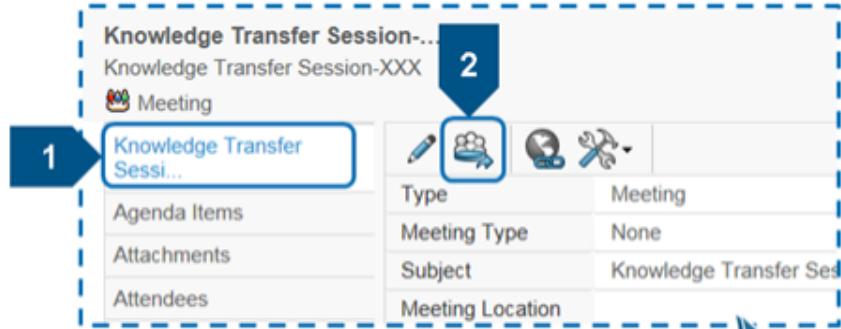
A blue arrow points from the 'Decisions' node in the category tree to the 'Decisions' section of the dialog box. A blue callout bubble labeled '3' is located in the bottom right corner of the dialog box.

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 **3DEXPERIENCE** platform.



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

1. Log in to the 3DEXPERIENCE platform with the following credentials:

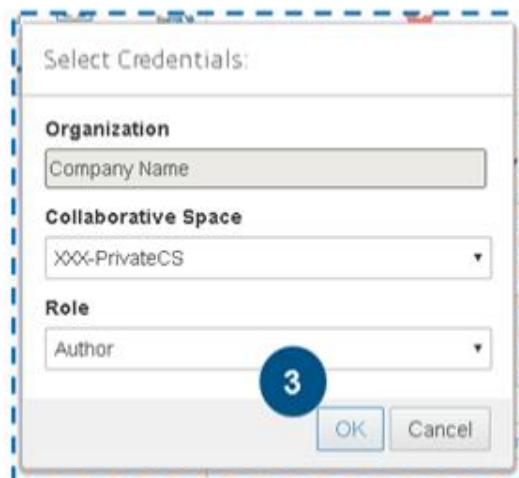
- a. Username or email: [Bronn-XXX]
- b. Password: [Bronn-XXX]



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

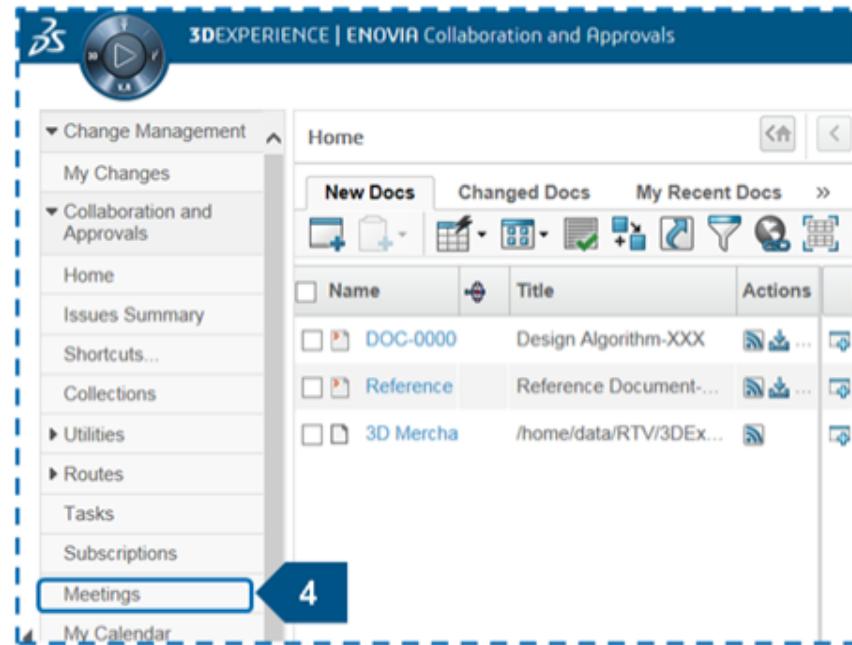
3. Select the following credentials, and click OK:

- a. Collaborative Space: XXX-PrivateCS
- b. Role: Author



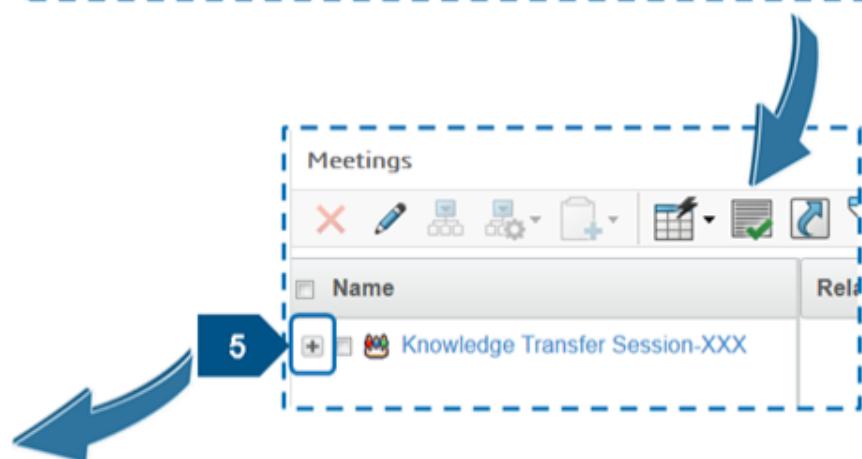
View the Meeting Invitation Using the My Desk Menu (2/2)

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



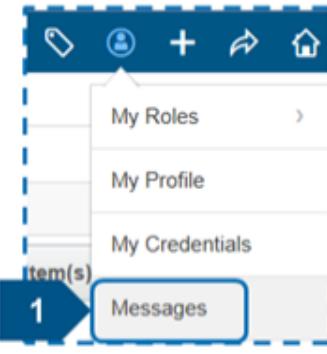
5. Expand the Knowledge Transfer Session-XXX meeting to view its agenda item, decision and attendees.

Meetings	
Name	Relationship
Knowledge Transfer Session-XXX	
Application of Data Analysis-XXX	Agenda Item
Anne-XXX	Meeting Attendee
Bronn-XXX	Meeting Attendee
DEC-000001	Decision
Mark-XXX	Meeting Attendee



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.

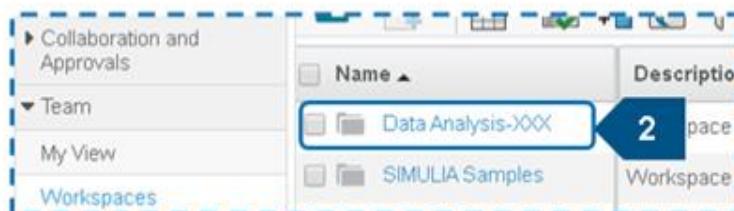
A screenshot of the 'Messages' screen. At the top, there are buttons for 'Create Message', 'Check Mail', and 'Delete Selected'. Below that is a table with columns for 'Subject' and 'From'. A row in the table is highlighted with a blue box and a large blue arrow labeled '2' pointing to it. The subject of the message is 'Meeting Invitation' and the from field shows 'Williams Mark'.

3. Close the window, and log out of the 3DEXPERIENCE platform.

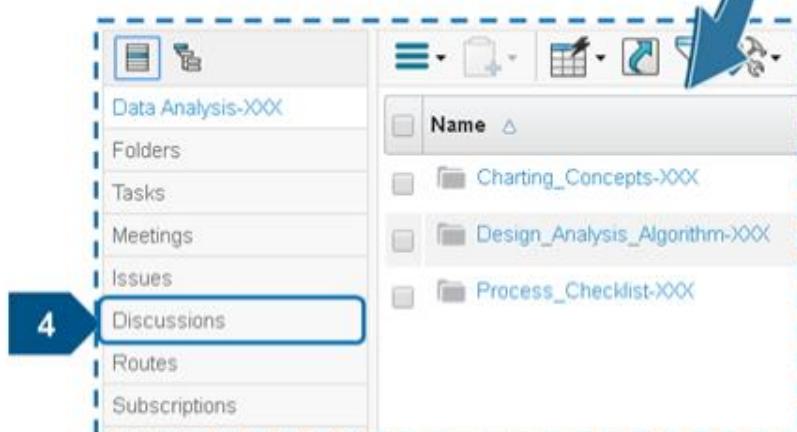
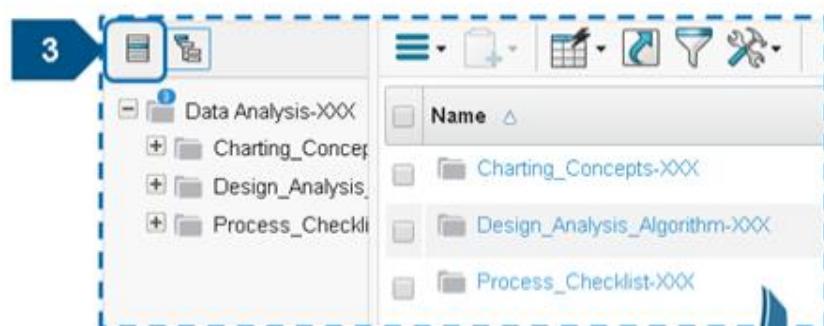
A screenshot of the 'Meeting+Invitation' window. On the left, there's a sidebar with 'Attachments'. On the right, under 'Mail Properties', there are fields for 'From' (Williams Mark), 'To' (Glover Bronn), 'CC', 'Subject' (Meeting Invitation), and a 'Message' body. The message body contains text about scheduled meetings and notes. At the bottom, there are 'Received' and 'Sent' fields, both showing 'Nov 16, 2016'.

Create a Discussion for the Workspace (1/2)

1. Log in to the 3DEXPERIENCE platform with the following credentials:
 - a. Username or email: [Mark-XXX]
 - b. Password: [Mark-XXX]
2. Navigate to the Data Analysis-XXX workspace.

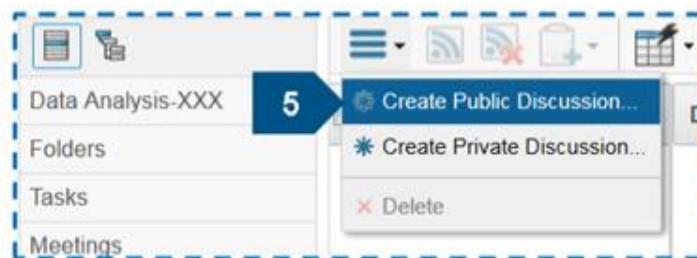


3. Select the Categories icon.
4. In the category tree, select Discussions.



Create a Discussion for the Workspace (2/2)

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

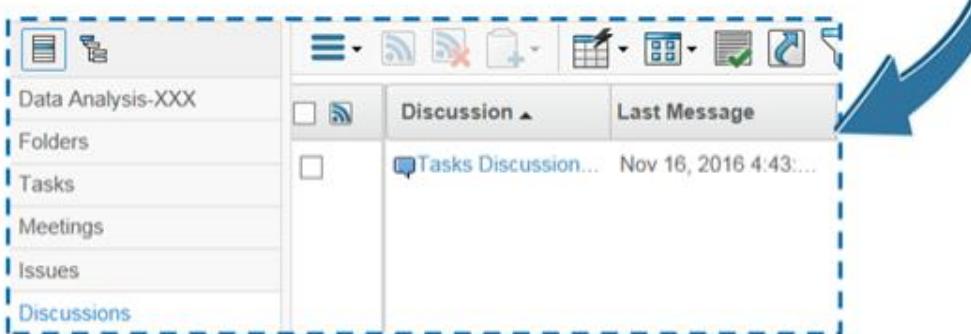


6. Specify the following details and click Done:

- a. Subject: [Tasks Discussion-XXX]
- b. Message: [Discussion on the tasks assigned to each member]

A screenshot of the 'Create Message' dialog box. It has sections for 'Type' (set to 'Message'), 'Subject' (set to 'Tasks Discussion-XXX'), and 'Message' (containing the text 'Discussion on the tasks assigned to each member'). At the bottom, there is a 'Visibility' section set to 'Public' and two buttons: 'Done' and 'Cancel'. A blue arrow points from the text in step 6b to the 'Subject' field. A large blue number '6' is in the bottom right corner of the dialog box.

7. Log out of the 3DEXPERIENCE platform.



Reply to the Discussion (1/2)

1. Log in to the 3DEXPERIENCE 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.

The screenshot shows the 3DEXPERIENCE My Desk interface. At the top is a navigation bar with a play button icon and the text "3DEXPERIENCE | ENOVIA Collaboration and Approvals". Below the bar is a sidebar with several menu items: Change Management, My Changes, Collaboration and Approvals, Home, Issues Summary, Shortcuts..., Collections, Utilities, Routes, Tasks, Subscriptions, Meetings, My Calendar, Decisions, and Discussions. The "Discussions" item is highlighted with a blue box and a blue arrow labeled "2" pointing to it.

The screenshot shows the "Discussions" page with a filter set to "All from last 30 days". The page includes a toolbar with various icons and a table listing discussions. One row in the table is highlighted with a blue box and a blue arrow labeled "4" pointing to it. The table columns include a checkbox, a feed icon, "Discussion", "Last Message", and "Visibility". The highlighted row contains a feed icon, the text "Tasks Discussion-XXX", the date "Oct 5, 2015...", and the word "Public".

The screenshot shows the "Discussions" page with a filter dropdown open, showing three options: "Subscribed", "All from last 30 days", and "All from last 90 days". A blue arrow labeled "3" points to the "All from last 30 days" option, which is highlighted with a blue box.

Reply to the Discussion (2/2)

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

Tasks Discussion-XXX

History

Attachments

Discussion Tasks Discussion-XXX : Properties

5 New Flat Sort Ascend

Tasks Discussion-XXX Mark Williams

Discussion on the tasks assigned to each member

Attachments

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

- Subject:** (Keep the default)
- Message:** [I have a review task and an approval task this week]

7. Log out of the **3DEXPERIENCE** platform.

Reply

Fields in red italics are required

Original Message

Discussion on the tasks assigned to each member

Subject

Re Tasks Discussion-X

Message

I have a review task and an approval task this week

Visibility

Public

6

Done Cancel

Discussion Tasks Discussion-XXX : Properties | A discussion related to: Data An

View Flat Sort Ascending Show All

Tasks Discussion-XXX Williams Mark Nov 16, 2016 4:43:58 PM

Discussion on the tasks assigned to each member

Attachments

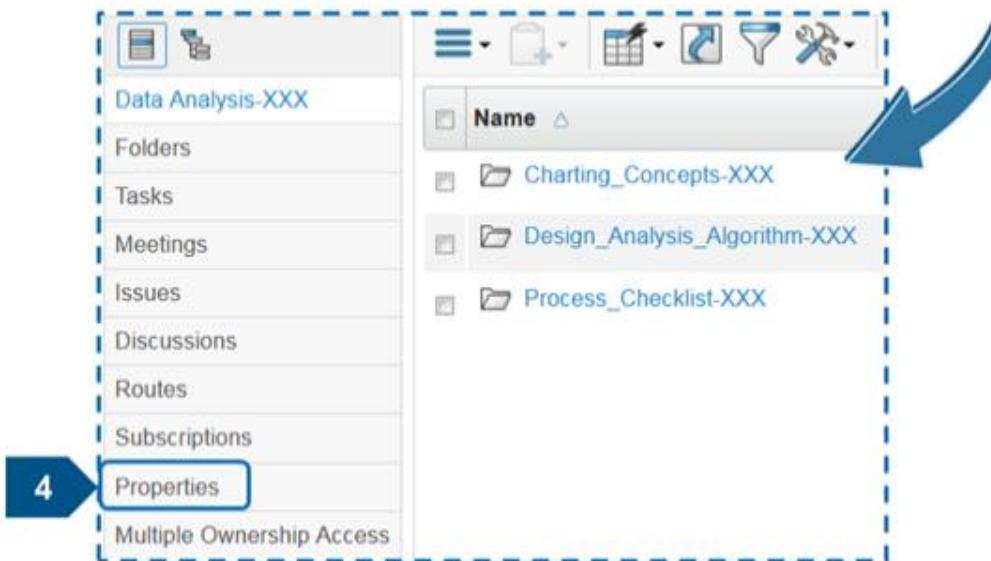
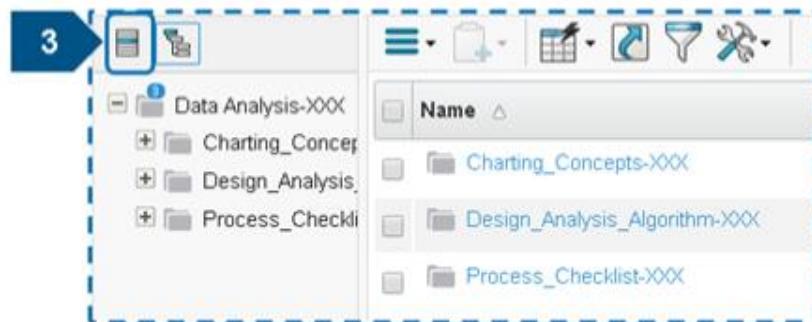
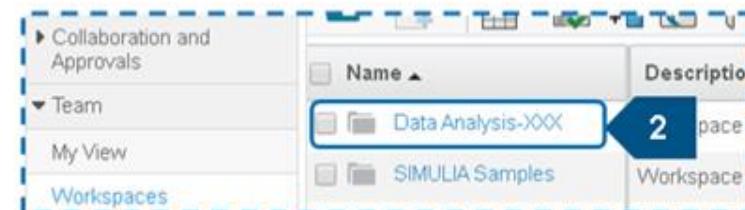
Re Tasks Discussion-XXX Glover Bronn Nov 16, 2016 4:50:48 PM

I have a review task and an approval task this week

Attachments Delete

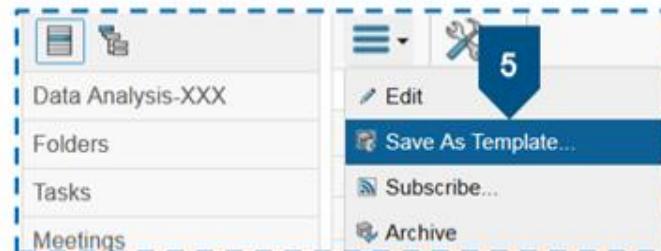
Save the Workspace as a Template (1/2)

1. Log in to the 3DEXPERIENCE 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)

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



- Specify the following details and click Done:

- Template Name: [Template_001-XXX]
- Description: [Workspace Template]
- Availability: (Keep the default value)
- Save Options: (Keep the default value)
- Template Data: (Keep the default value)

The dialog box has a title 'Save Workspace Template'. It contains fields for 'Template Name' (Template_001-XXX), 'Description' (Workspace Template), and 'Availability' (User selected). Under 'Save Options', 'Save as New Template' is selected. Under 'Template Data', both 'Members' and 'Folder Structure' are checked. At the bottom are 'Done' and 'Cancel' buttons.

Template Name
Template_001-XXX

Description
Workspace Template

Availability
 User
 Enterprise

Save Options
 Save as New Template

Template Data
 Members
 Folder Structure

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

A screenshot of the workspace properties dialog box. On the left, a sidebar lists Data Analysis-XXX, Folders, Tasks, Meetings, Issues, Discussions, Routes, Subscriptions, and Properties. The main area shows workspace details: Name (Data Analysis-XXX), Template (Template_001-XXX, highlighted with a blue box and arrow), Image, Owner (Williams Mark), State (Active), Originated (Nov 16, 2016), Buyer Desk, and Description (Workspace for data analysis). A large blue arrow points from the 'Template' field in the properties dialog to the 'Template' field in the 'Save Workspace Template' dialog. A blue callout bubble labeled '6' is in the bottom right corner of the properties dialog.

Name
Data Analysis-XXX

Template
Template_001-XXX

Image

Owner
Williams Mark

State
Active

Originated
Nov 16, 2016

Buyer Desk

Description
Workspace for data analysis

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:

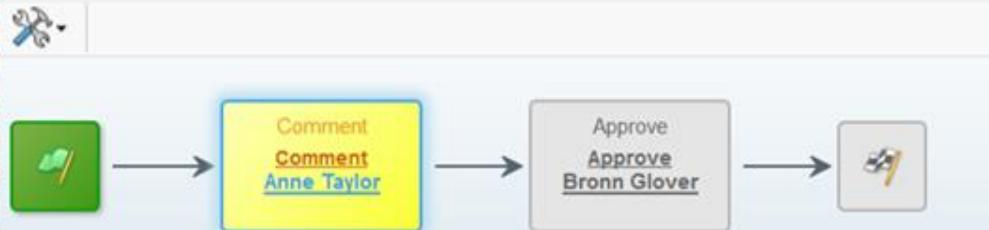
1. Create a route using the wizard
2. Save the route as a template
3. Create a new route template

Properties Content Access Discussions History

Name Product_Design-XXX State Started
Owner Anne Taylor Scope Data A
Description Route for Design Analysis Template 
Originated Oct 6, 2015 Route Base Standard
Route Completion Action Notify Route Owner Auto Stop On Rejection Immediate
Purpose

Tasks (Graphical) Tasks

Product_Design-XXX : Tasks (Graphical)

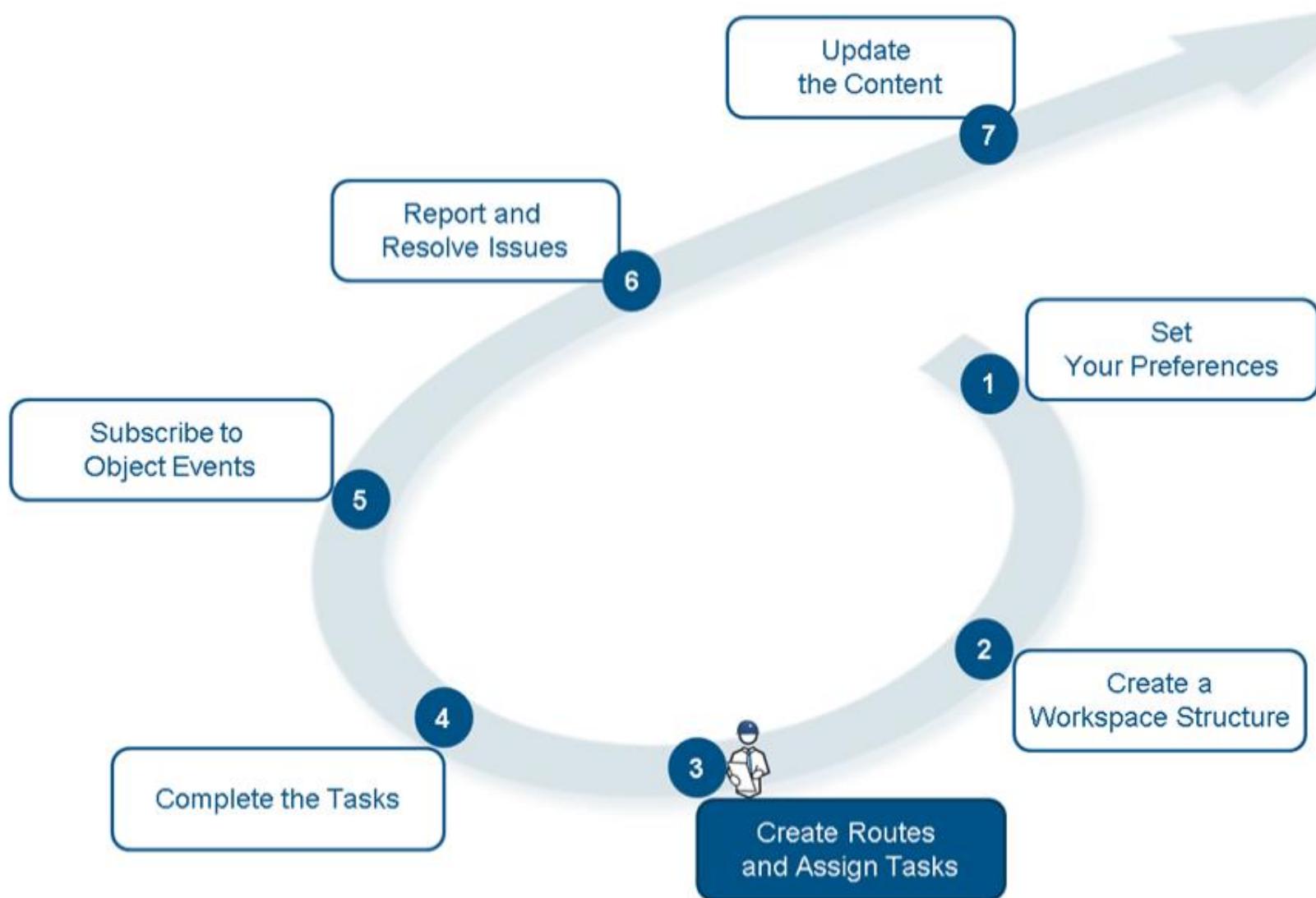


```
graph LR; A[Comment<br>Comment<br>Anne Taylor] --> B[Approve<br>Approve<br>Bronn Glover]; B --> C[ ]
```



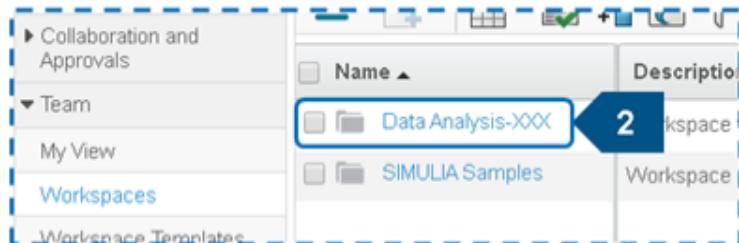
45 minutes

Exercise Progression

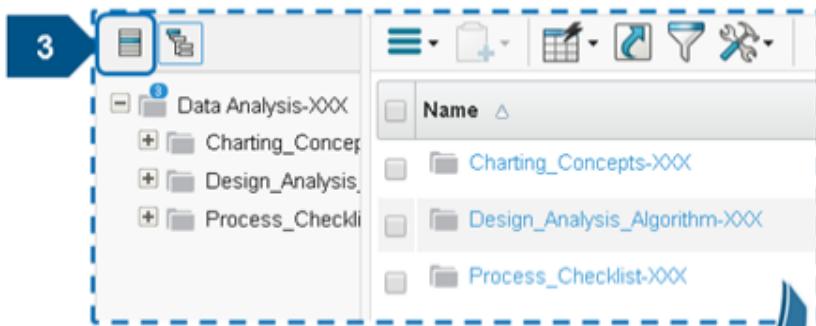


Create a Route (1/8)

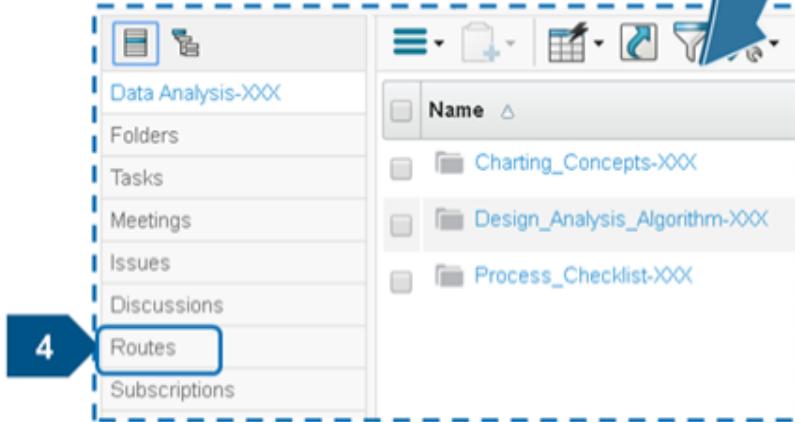
1. Ensure that you are logged in as *Mark-XXX*.
2. Navigate to the **Data Analysis-XXX** workspace.



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**.



Step 1 of 4: Specify Details

Add Content Selected

Fields in red italics are required.

Name AutoName

Template

Step 1 of 2: Specify Details

Fields in red italics are required.

Name AutoName

Type Document

Policy Document Release

Title Process Document-XXX

Description Workflow Process Document

Workspace Folder Process Checklist-XXX

Next Cancel

Step 2 of 2: Upload Files

File | Format Comments

Browse... Workflow_Process_Document.docx generic

Previous Done Cancel

Create a Route (3/8)

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

Step 1 of 4: Specify Details

Add Content Remove Selected

Fields in red italics are required.

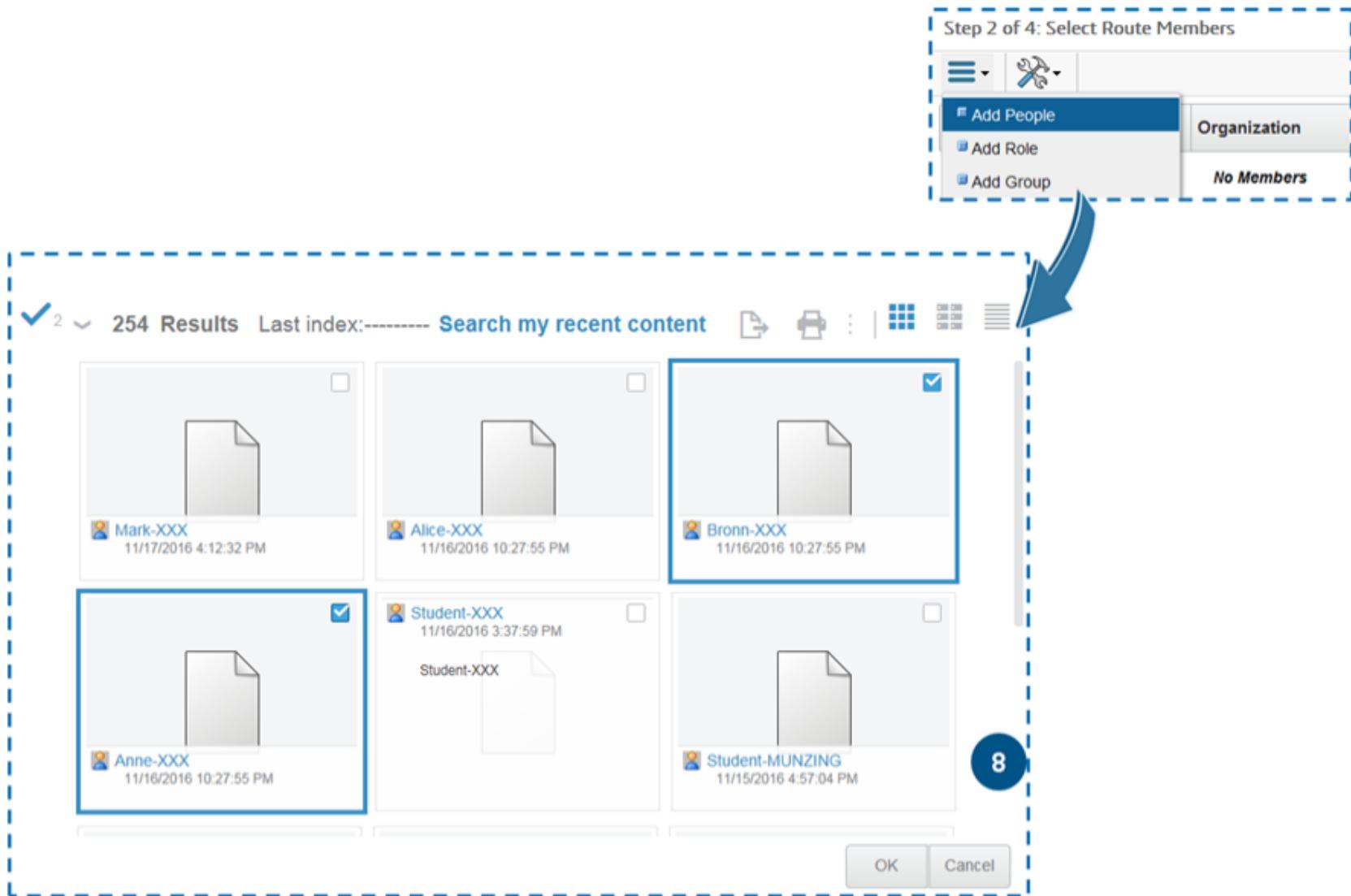
Name	: for Workflow Process-XXX <input checked="" type="checkbox"/> AutoName		
Template	<input type="button" value="..."/> Clear		
Description	Workflow process for the Data Analysis Workspace		
Route Base Purpose	Standard		
Scope	<input type="radio"/> All <input checked="" type="radio"/> Organization <input type="radio"/> Data Analysis-XXX		
Route Completion Action	Notify Route Owner		
Start Route	<input checked="" type="radio"/> Upon Wizard Completion <input type="radio"/> Manually		
Auto Stop On Rejection	immediate		
Content			
Name	Rev	Ver	State Condition
Process Document-XXX	0	1	In Work

7

Next Cancel

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.

The screenshot shows two overlapping SAP Fiori components. On the left, a 'Select Groups' dialog is displayed with a dashed border. It contains a search bar with 'Name' and filter buttons for 'Top Level' and 'Sublevels'. A table lists groups with columns for 'Name' and 'Description'. The 'Documentation' group is selected, indicated by a checked checkbox and highlighted in light blue. On the right, a context menu is open with a dashed border, showing options: 'Add People', 'Add Role', 'Add Group' (which is highlighted in blue), 'Add Member List', and 'Remove Selected'. A blue arrow points from the 'Add Group' option in the menu to the selected 'Documentation' group in the dialog. A blue circle with the number '9' is located in the bottom right corner of the menu area.

Name	Description
<input type="checkbox"/> Design Engineering	Group created for Design Engineers
<input type="checkbox"/> Distribution Groups	The parent group for all distribution groups that are
<input checked="" type="checkbox"/> Documentation	In charge of documenting the Software.
<input type="checkbox"/> Order Entry	Group created for Order Entry Clerks
<input type="checkbox"/> Product Management	Group created for Product Managers
<input type="checkbox"/> Production Support	The parent group for all Production Support Clerks

18 objects, 1 selected Done Cancel

Type	Organization
Person	MyCompany
Person	MyCompany

Create a Route (6/8)

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

Step 2 of 4: Select Route Members

<input type="checkbox"/>	Name	Type	Organization	Scope	Access	Add Remove
<input type="checkbox"/>	Bronn, Glover	Person	MyCompany	Organization	Read	Add Remove
<input type="checkbox"/>	Documentation	Group		Organization	Read	Add Remove
<input type="checkbox"/>	Taylor, Anne	Person	MyCompany	Organization	Read	Add Remove

10

Previous

Next

Cancel

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**

<input type="checkbox"/>	Title, Action & Order	Assignee & Instructions	Due Date & Time (EDT)
<input type="checkbox"/>	Approve the Process Document	Taylor, Anne Approve the Process Document	<input checked="" type="radio"/> Nov 19, 2016 <input type="button" value="Clear"/> <input type="radio"/> 2 day(s) from Route Start Date <input type="radio"/> Assignee-Set Due Date <input type="checkbox"/> Allow Delegation <input type="checkbox"/> Requires Owner Review
<input type="checkbox"/>	Comment	Bronn, Glover	<input checked="" type="radio"/> 5:00 PM <input type="button" value="Clear"/> <input type="radio"/> Previous <input type="radio"/> Next <input type="radio"/> Cancel

11a

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

Step 3 of 4: Define Route Tasks

Title, Action & Order	Assignee & Instructions	Due Date & Time (EDT)
<input type="checkbox"/> Approve the Workflow Process Action: Approve Order: 3	Bronn, Glover	<input checked="" type="radio"/> Nov 22, 2016 <input type="button" value="Clear"/> <input type="button" value="5:00 PM"/> <input type="radio"/> day(s) from <input type="button" value="Route Start Date"/> <input type="radio"/> Assignee-Set Due Date <input type="checkbox"/> Allow Delegation <input checked="" type="checkbox"/> Requires Owner Review
<input type="checkbox"/> Approve the Process Do Action	Taylor, Anne	<input checked="" type="radio"/> Nov 22, 2016 <input type="button" value="Clear"/> <input type="button" value="5:00 PM"/>

11b

Previous Next Cancel

Create a Route (8/8)

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

d. Click **Next**.

The screenshot shows the 'Route Step' configuration dialog. A dashed blue box highlights the 'Documentation' group settings. Inside, the 'Title and Instruction' field contains 'Review the Process Document'. The 'Action' dropdown is set to 'Comment'. The 'Order' dropdown is set to '1'. To the right, the 'Advanced' section includes a date and time selector showing 'Nov 18, 2016' at '5:00 PM'. Below it are options for 'day(s) from Route Start Date' and 'Assignee-Set Due Date'. At the bottom are 'Previous', 'Next', and 'Cancel' buttons. A blue circle labeled '11c' is positioned to the right of the date/time controls.

11d

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

The screenshot shows the 'Step 4 of 4: Action Required' summary table. It lists three actions: 'Review the Process Document' (Comment), 'Approve the Process Document' (Approve), and 'Approve the Workflow Process' (Approve). The table has columns for Order, Name, Action, and Action Required. At the bottom are 'Previous', 'Done', and 'Cancel' buttons. A blue circle labeled '12' is positioned to the right of the table.

Order	Name	Action	Action Required
1	Review the Process Document	Comment	
2	Approve the Process Document	Approve	
3	Approve the Workflow Process	Approve	

12

Save the Route as a Template (1/2)

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

The screenshot shows the 'Save as Template' dialog box. On the left, a blue arrow labeled '1' points to the 'Save as Template...' option in the Actions menu. A large blue arrow points from the menu to the dialog box. On the right, a blue circle labeled '2' is positioned over the 'Done' button at the bottom right of the dialog.

Route for Workflow Process-XX...

Fields in red italics are required

Type: Route Template

Template Name: Standard Template-XXX

Description: This is the standard route template for workflow processes

Availability:
 User
 Workspace/Project Space

Workspace/Project Space: Data Analysis-XXX

Scope:
 All
 Organization

Route Task Edits: Modify/Delete Task List

Save Options:
 Save as New Template

Template Data:
 Task Assignees

Buttons: Done (highlighted), Cancel

2. Specify the following details and click Done:

- Template Name: [Standard Template-XXX]
- Description: [This is the standard route template for workflow processes]
- Availability: Workspace/Project Space
- Workspace/Project Space: Data Analysis-XXX
- Scope: All
- 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.

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

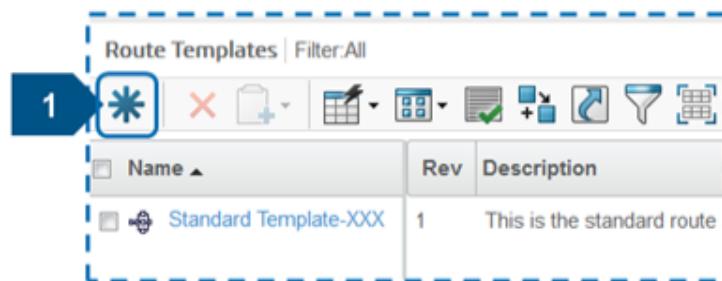
The screenshot shows the ENOVIA Collaboration and Approvals Home interface. A dashed blue box highlights the 'Properties' tab of a route's properties dialog. The route is named 'Route for Workflow Process-XXX'. The 'Template' field is highlighted with a blue box and contains the value 'Standard Template-XXX'. Other properties shown include State (Started), Scope (Organization), Route Base Purpose (Standard), and Auto Stop On Rejection (Immediate). The top bar shows the route's name as '-XXX', its owner as 'Williams Mark', and the modification date as 'Nov 17, 2016 11:51:55 AM'. The right side of the screen shows a navigation bar with icons for Home, New Docs, and Changed Docs.

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

The screenshot shows the My Desk menu with a dashed blue box around the 'Routes' section. Under 'Routes', the 'Route Templates' option is highlighted with a blue box and a large blue arrow pointing to it from the bottom left. To the right, there is a preview of the 'Route Templates' page, which lists a single template: 'Standard Template-XXX' with a description 'This is the standard route ...'. The top bar shows the route's name as '-XXX', its owner as 'Williams Mark', and the modification date as 'Nov 17, 2016 11:51:55 AM'. The right side of the screen shows a navigation bar with icons for Home, New Docs, and Changed Docs.

Create a New Route Template (1/4)

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



2. Specify the following details, and click Next:

- Name: [Route for Design Analysis-XXX]
- Description: [Route for Design Analysis]
- Availability: Enterprise
- Scope: Organization

The screenshot shows the "Step 1 of 4 : Specify Details" dialog box. A blue arrow labeled "2" points to the "Next" button at the bottom right. The form contains fields for Name (Route for Design Analys), Description (Route for Design Analysis), Availability (Enterprise selected), Owning Organization (Company Name), Route Base Purpose (Standard), Scope (Organization selected), Route Task Edits (Modify/Delete Task List), and Auto Stop On Rejection (Immediate). The "Name" field has a red asterisk indicating it is required.

Create a New Route Template (2/4)

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

The screenshot shows a search interface with a results count of 6266. Two entries are highlighted with checkboxes: 'Anne-XXX' (11/16/2016 10:27:55 PM) and 'Bronn-XXX' (11/16/2016 10:27:55 PM). A large blue arrow points from the 'Add People' section of the top navigation bar to the search results. A blue circle with the number '3' is placed over the 'OK' button at the bottom right of the dialog.

4. Edit the accesses as shown and click Next.

The screenshot shows a table titled 'Step 2 of 4: Select Route Template Members'. It lists two entries: 'Glover, Bronn' (Person, Company Name, Organization, Read Write access) and 'Taylor, Anne' (Person, Company Name, Organization, Add Remove access). A blue circle with the number '4' is placed in the top right corner of the dialog.

	Name	Type	Organization	Scope	Access
<input type="checkbox"/>	Glover, Bronn	Person	Company Name	Organization	ReadWrite
<input type="checkbox"/>	Taylor, Anne	Person	Company Name	Organization	Add Remove

Create a New Route Template (3/4)

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

Step 3 of 4: Define Route Tasks

Title, Action & Order	Assignee & Instructions	Advanced
<input type="checkbox"/> Comment Action: Comment Order: 1	Taylor, Anne Comment	<input type="radio"/> day(s) from Route Start Date <input checked="" type="radio"/> Assignee-Set Due Date <input type="checkbox"/> Allow Delegation <input type="checkbox"/> Requires Owner Review
<input type="checkbox"/> Approve Action: Approve Order: 2	Bronn, Glover Approve	<input type="radio"/> day(s) from Route Start Date <input checked="" type="radio"/> Assignee-Set Due Date <input type="checkbox"/> Allow Delegation <input type="checkbox"/> Requires Owner Review

5

Previous Next Cancel

Create a New Route Template (4/4)

6. Click Done.

Step 4 of 4: Action Required



Order	Name	Action	Action Required
1	Comment	Comment	
2	Approve	Approve	

6

Previous

Done

Cancel

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

Route for Design Analysis-XXX

Tasks	Name	Route for Design Analysis-XXX
Revision	Revision	1
Lifecycle	State	Inactive
History	Owner	Mark Williams
	Originator	Mark Williams

7



Observe that the template is now in the Active state.

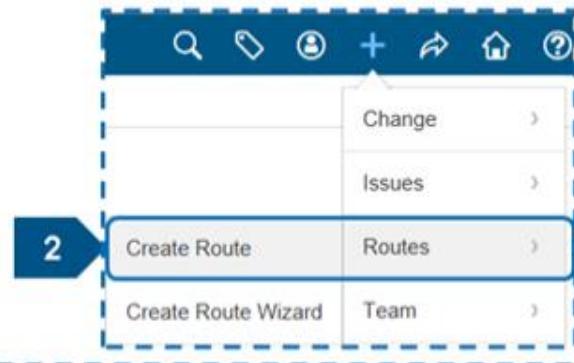
Route for Design Analysis-XXX

Access	State	Active
Tasks	Name	Route for Design Analysis-XXX
Revision	Revision	1
Lifecycle	State	Active
History	Owner	Mark Williams
	Originator	Mark Williams
	Availability	Workspace: Data Analysis-XXX

8. Log out of 3DEXPERIENCE platform.

Create a Route using the Template (1/2)

1. Log in to the 3DEXPERIENCE 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



The 'Create Route' dialog box is open. It shows the following details:

Type	Route
Name	Product_Design-XXX <input type="checkbox"/> AutoName
Template	Route for Design Analy <input type="button"/> Clear
Description	Route for Design Analysis
Route Base Purpose	Standard <input type="button"/>
Scope	All <input type="radio"/> Organization <input type="radio"/> Data Analysis-XXX <input type="checkbox"/>
Route Completion Action	Notify Route Owner <input type="button"/>

At the bottom right of the dialog box is a blue circle with the number '3'.

The workspace properties panel is shown with the following details:

Properties	Content	Access	Discussions	History
Name	Product_Design-XXX			
Owner	Taylor, Anne			
Description	Route for Design Analysis			
Originated	06-Dec-2016			
Route Completion Action	Notify Route Owner			

A large blue arrow points from the 'Scope' section of the 'Create Route' dialog to the 'Data Analysis-XXX' workspace entry in the properties panel.

Create a Route using the Template (2/2)

- In the page toolbar, select Actions > Start Route..., and refresh the page.

Observe that the route has started.

The screenshot shows the Siebel interface for creating a route. At the top, there's a toolbar with tabs: Properties, Content, Access, Discussions, and History. Below the toolbar is a table with route details:

Name	Product_Design-XXX	State	Started
Owner	Anne Taylor	Scope	Data Analysis-XXX
Description	Route for Design Analysis	Template	Route for Design Analysis-XXX
Originated	Oct 6, 2015	Route Base Purpose	Standard
Route Completion Action	Notify Route Owner	Auto Stop On Rejection	Immediate

Below the table, under the "Tasks (Graphical)" tab, is a diagram titled "Product_Design-XXX : Tasks (Graphical)". The diagram shows a sequence of four tasks connected by arrows:

- A green square icon with a gear symbol, followed by an arrow.
- A yellow rounded rectangle containing the text "Comment" and "Comment Anne Taylor".
- A grey rounded rectangle containing the text "Approve" and "Approve Bronn Glover".
- A grey square icon with a gear symbol.

A large blue dashed box surrounds the entire "Tasks (Graphical)" section. A blue arrow points from the "Start Route..." option in the toolbar menu down to the "Tasks (Graphical)" section. The number "5" is also present near the arrow.

Recap: Create a Workflow using Routes

In this exercise, you have:

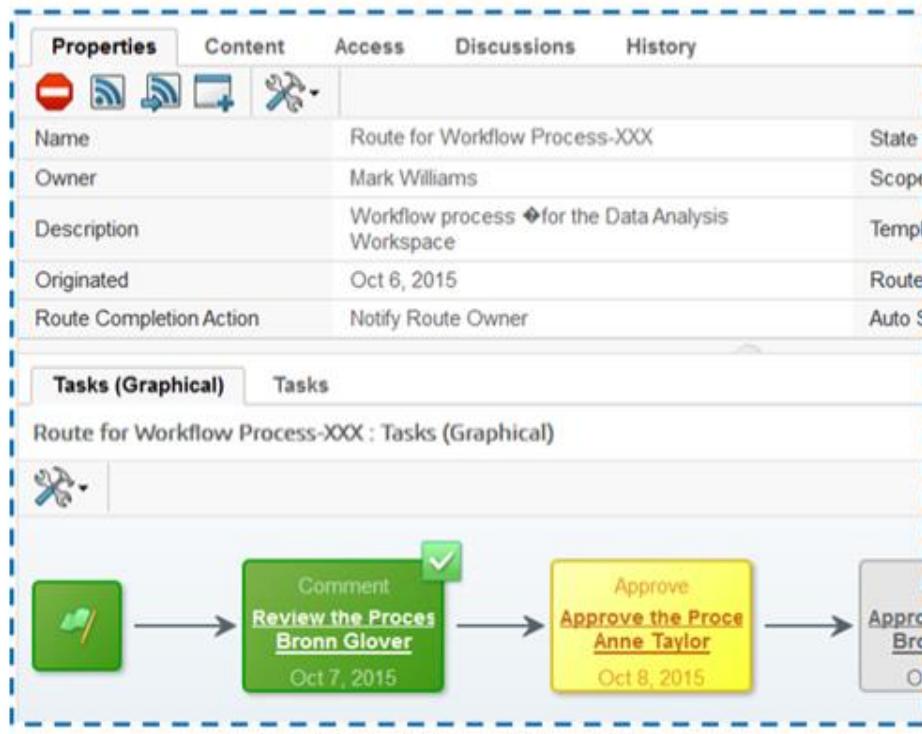
- Created routes
- Saved a route as a template
- Created a new route template

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.

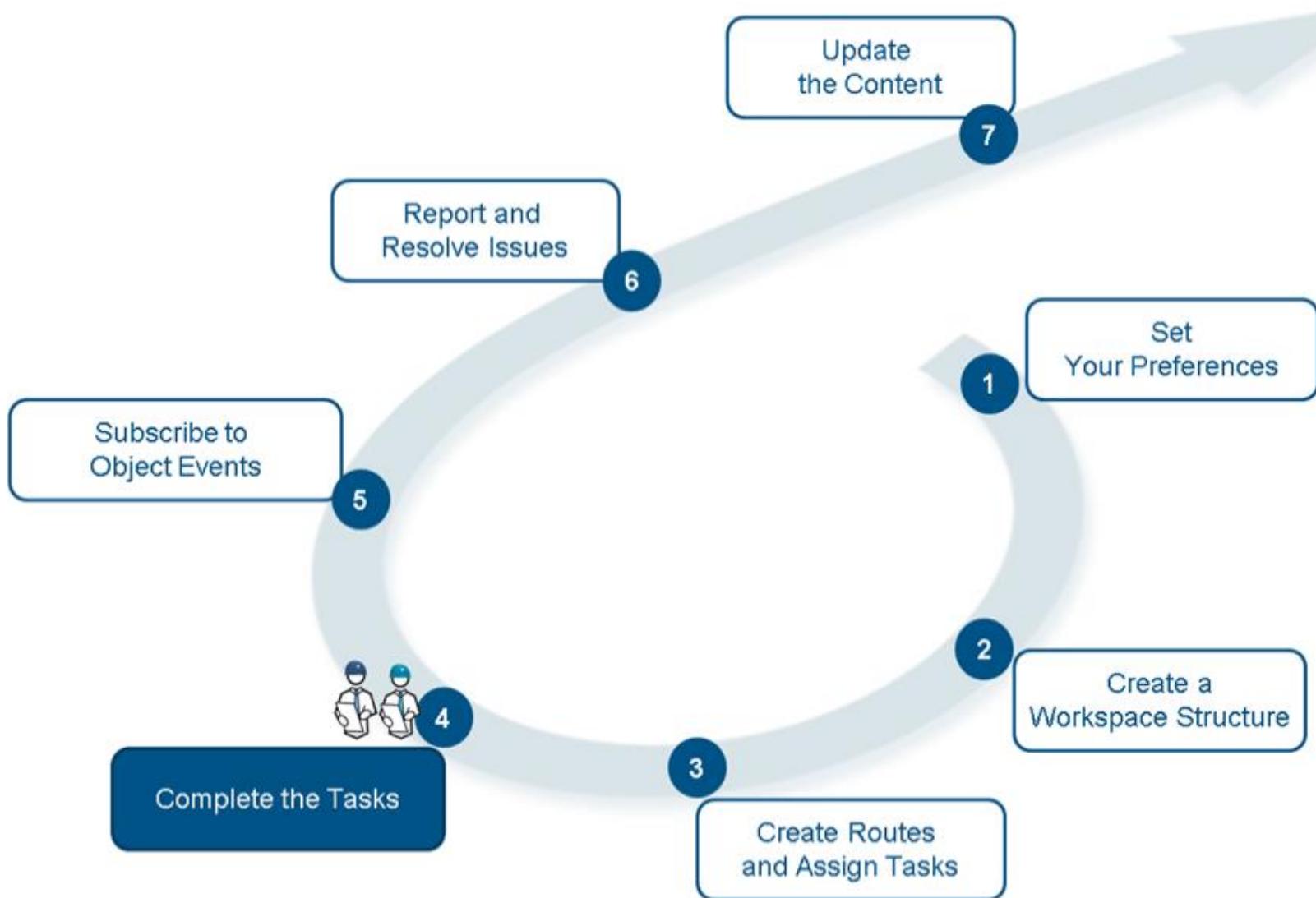
By the end of this exercise you will be able to:

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



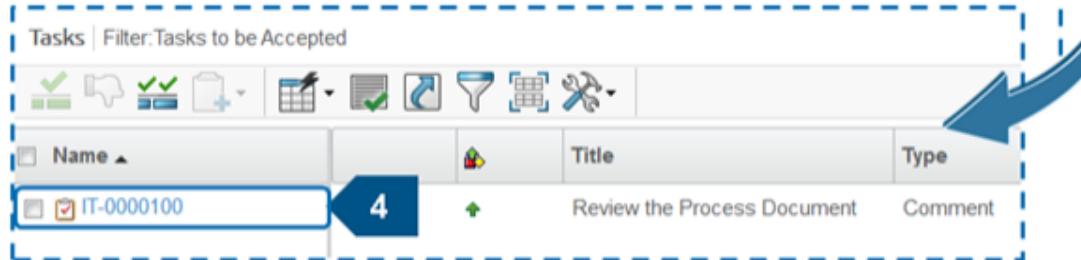
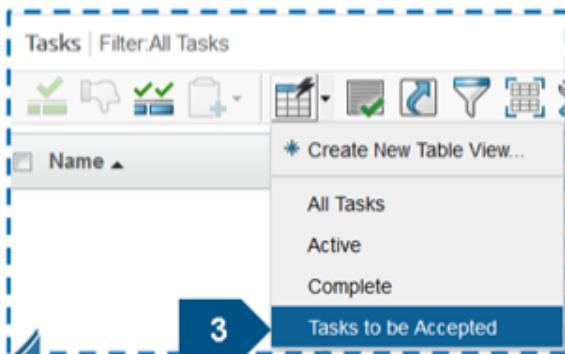
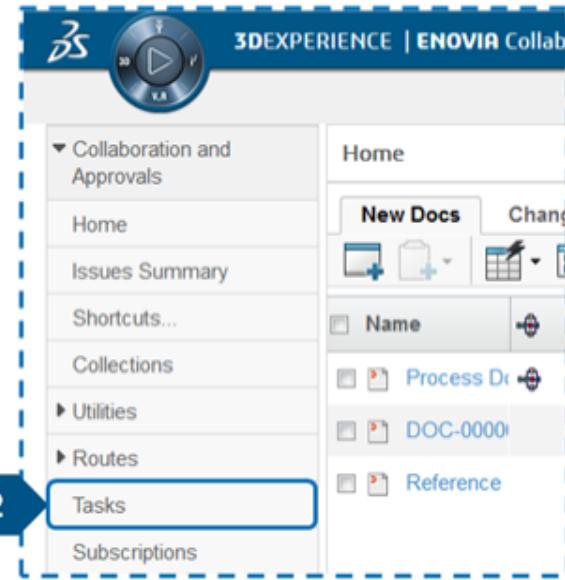
40 minutes

Exercise Progression



Accept the Task (1/2)

1. Log in to the 3DEXPERIENCE 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)

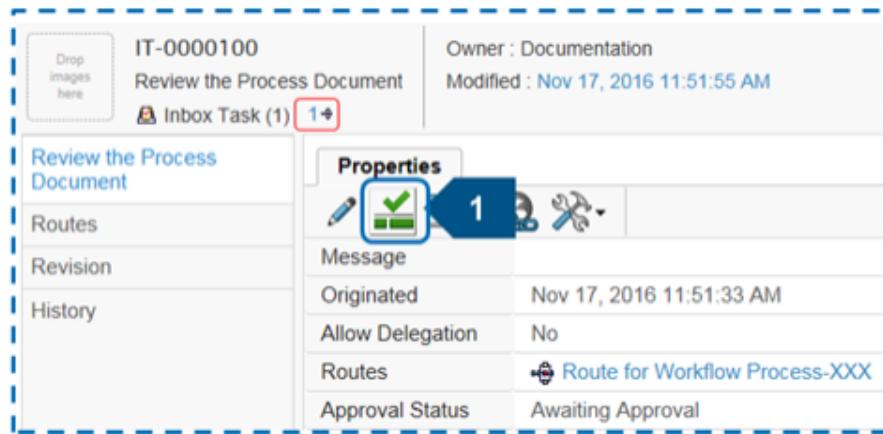
5. In the page toolbar, click Accept Task.

The screenshot shows the Fiori Task List interface. At the top, there is a header with document details: IT-0000100, Review the Process Document, Owner: Documentation, Modified: Nov 17, 2016 11:51:55 AM, and an inbox task count of 1. Below the header is a sidebar with links: Review the Process Document (selected), Routes, Revision, and History. To the right of the sidebar is a 'Properties' panel. A large blue arrow points from the 'Accept Task' button in the properties panel to the 'Assignee' field in the detailed view below. The 'Properties' panel includes icons for edit, add, search, and tools. The detailed view shows the following data:

Properties			
Message	Route Owner	Mark-XXX	
Originated	Nov 17, 2016 11:51:33 AM	Due Date	Nov 18, 2016 5:00:00 PM
Allow Delegation	No	Assignee	Glover Bronn
Routes	Route for Workflow Process-XXX	Action	Comment
Approval Status	Awaiting Approval	State	Assigned
Task Requirement	Optional	Instructions	Review the Process Document
Comments	Route Owner Review	Route Owner	No

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**.

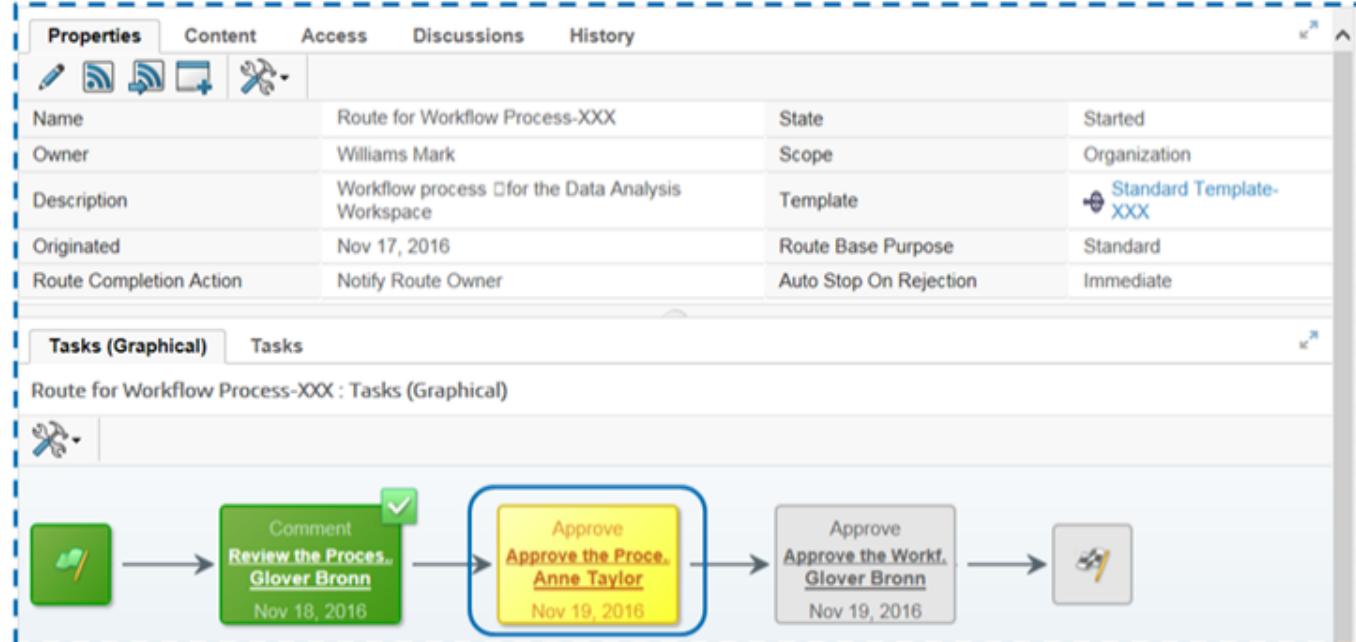
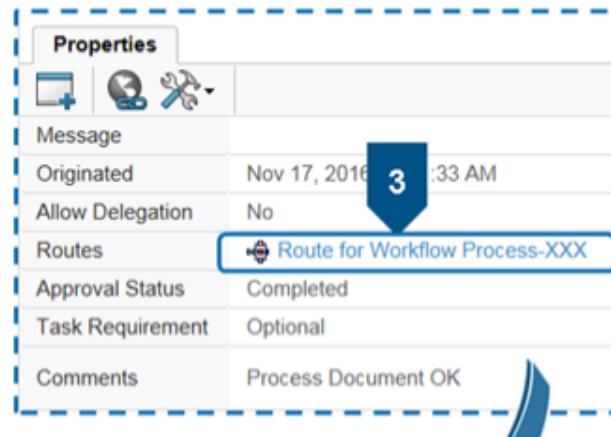
The screenshot shows the 'Edit Task Details' dialog box. It includes fields for 'Assignee' (set to 'Glover Bronn') and a 'Comments' area where 'Process Document OK' is entered. At the bottom, there are 'Complete' and 'Cancel' buttons. A blue circle labeled '2' is placed near the 'Complete' button.

Complete the Task (2/2)

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

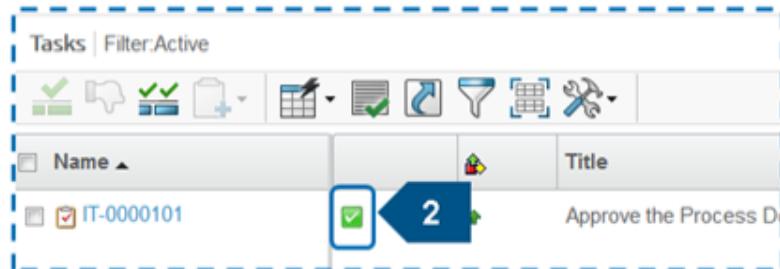
Observe that the next active task is assigned to Anne.

- Log out of the 3DEXPERIENCE platform.



Approve the Tasks (1/2)

1. Log in to the 3DEXPERIENCE 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**.

The screenshot shows the 'Edit Task Details' dialog box. It includes fields for 'Due Date' (set to Nov 19, 2016, 5:00 AM), 'Assignee' (Taylor Anne), and 'Comments' (Approved). The 'Approval Status' section contains three radio buttons: 'Approve' (selected), 'Reject', and 'Abstain'. At the bottom are 'Done' and 'Cancel' buttons. A blue circle with the number '3' is located in the bottom right corner of the dialog.

Approve the Tasks (2/2)

- Similarly, approve the next assigned task.

Tasks | Filter: All Tasks

Name	Comment	Title	Type	State
IT-0000101	<input checked="" type="checkbox"/>	Comment	Comment	Assigned
IT-0000102	<input checked="" type="checkbox"/>	Approve the ...	Approve	Completed

Tasks | Filter: All Tasks

Name	Comment	Title	Type	State
IT-0000101	<input checked="" type="checkbox"/>	Comment	Comment	Complete
IT-0000102	<input checked="" type="checkbox"/>	Approve the...	Approve	Complete

Edit Task Details

Fields in red italics are required

Due Date: Oct 7, 2015, 5:00 AM

Assignee: Anne Taylor

Comments: Design is complex but feasible

4

Done Cancel

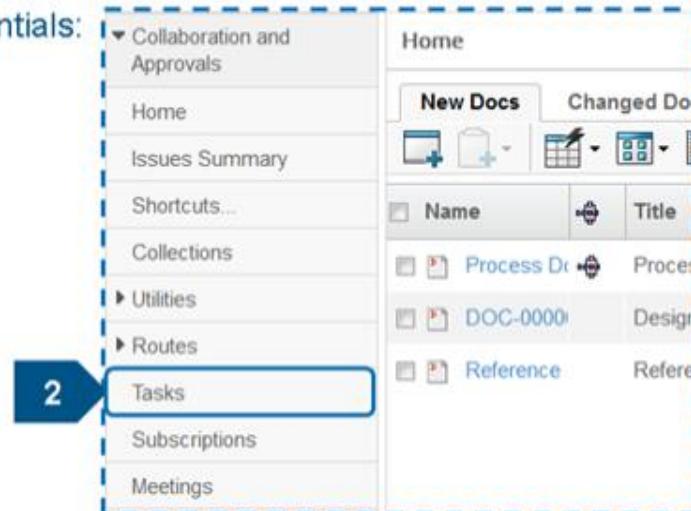
- Log out of the 3DEXPERIENCE platform.

Abstain a Task (1/3)

1. Log in to the 3DEXPERIENCE 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.

Name		Title	Type	State	Instructions	Due Date	Context
IT-0000100	<input checked="" type="checkbox"/>	Review the...	Comment	Complete	Review the ...	Oct 7, ...	Route for Workf...
IT-0000103	<input checked="" type="checkbox"/>	Approve th...	Approve	Assigned	Approve the...	Oct 8, ...	Route for Workf...
IT-0000104	<input checked="" type="checkbox"/>	Approve	Approve	Assigned	Approve	Oct 7, ...	Product_Design

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.

4

Edit Task Details

Assignee
Bronn Glover

Comments
Schedules to be checked

Approval Status
 Approve
 Reject
 Abstain

Done Cancel

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

5

Name		Title	Type	State	Instructions	Due Date	Context
IT-0000100	<input checked="" type="checkbox"/>	Review the P...	Comment	Complete	Review the Proces...	Oct 7,...	Route for Workflow Proce...
IT-0000103	<input checked="" type="checkbox"/>	Approve the ...	Approve	Review	Approve the Workfl...	Oct 8,...	Route for Workflow Proce...
IT-0000104	<input checked="" type="checkbox"/>	Approve	Approve	Assigned	Approve	Oct 7,...	Product_Design-XXX

Abstain a Task (3/3)

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

Properties Content Access Discussions History

Name	Route for Workflow Process-XXX	State	Started
Owner	Mark Williams	Scope	Organization
Description	Workflow process for the Data Analysis Workspace	Template	Standard Template-X
Originated	Oct 6, 2015	Route Base Purpose	Standard
Route Completion Action	Notify Route Owner	Auto Stop On Rejection	Immediate

Tasks (Graphical) Tasks

Route for Workflow Process-XXX : Tasks (Graphical)

```
graph LR; A[Comment] --> B[Approve]; B --> C[Review]; C --> D[End]
```

The screenshot shows a workflow interface for a route named "Route for Workflow Process-XXX". The "Properties" tab is selected, displaying basic information like name, owner, and description. Below it, the "Tasks (Graphical)" tab is selected, showing a graphical representation of the workflow. The workflow consists of four tasks connected by arrows: 1. A green square task labeled "Comment" with the sub-task "Review the Proces" assigned to "Bronn Glover" on "Oct 7, 2015". 2. A green square task labeled "Approve" with the sub-task "Approve the Proce" assigned to "Anne Taylor" on "Oct 8, 2015". 3. A yellow square task labeled "Review" with the sub-task "Approve the Work!" assigned to "Mark Williams" on "Oct 8, 2015". 4. A grey square task labeled "End". The "Review" task is highlighted with a blue border, indicating it is the current task or the next one in the sequence.

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.

Name		Title	Type	State	Instructions	Due Date	Context
IT-0000100	<input checked="" type="checkbox"/>	Review the P...	Comment	Complete	Review the Proces...	Oct 7,...	Route for Workflow Proces...
IT-0000103	<input checked="" type="checkbox"/>	Approve the ...	Approve	Review	Approve the Workfl...	Oct 8,...	Route for Workflow Proces...
IT-0000104	<input checked="" type="checkbox"/>	Approve	Approve	Assigned	Approve	Oct 7,...	Product_Design-XXX

2. Select the following details, and click Done:

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

b. **Approval Status:** Reject

Edit Task Details

Fields in red *italics* are required

Due Date
Oct 7, 2015

Assignee
Bronn Glover

Comments
Simplify the design

Approval Status
 Approve
 Reject
 Abstain

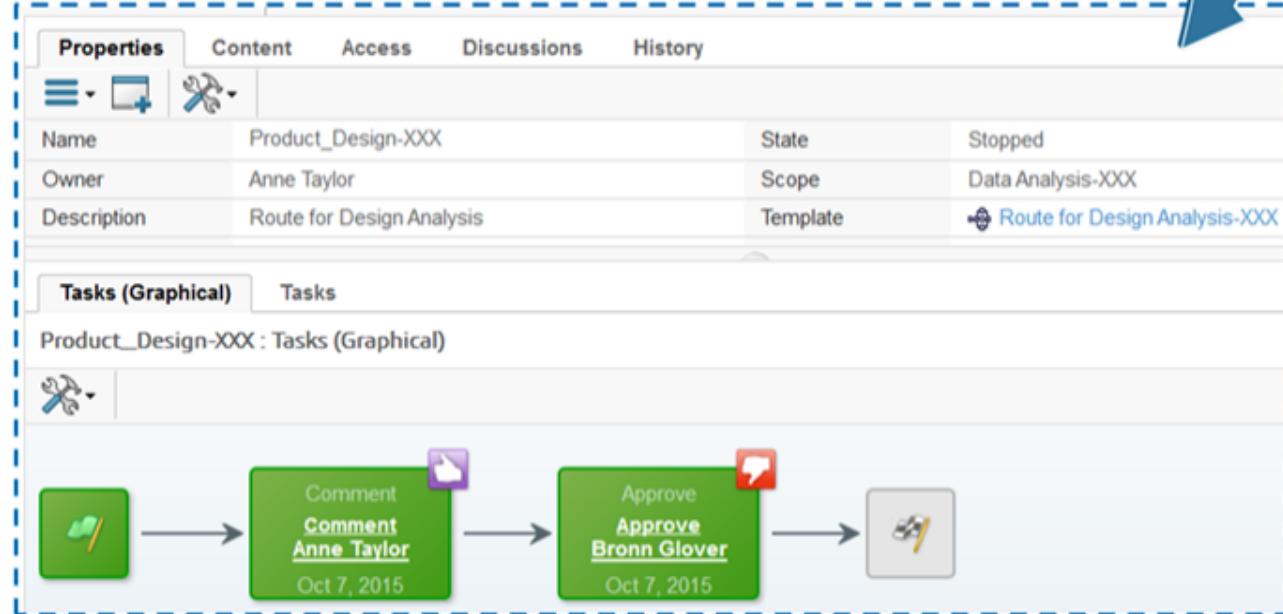
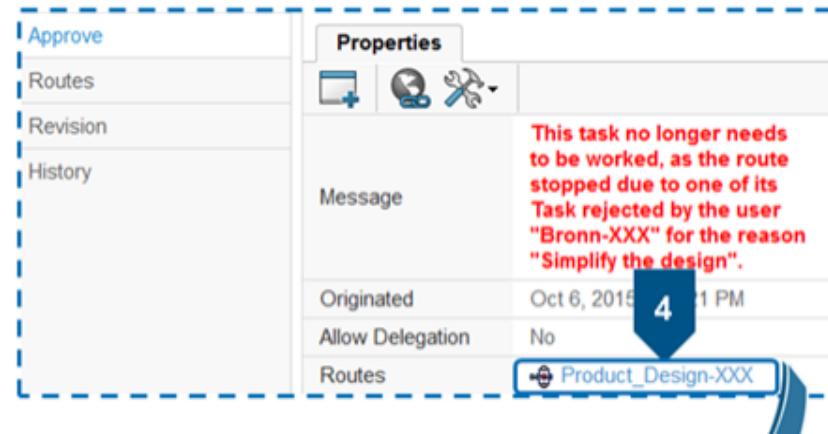
Done Cancel

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 **3DEXPERIENCE** platform.



Restart the Route

1. Log in to the 3DEXPERIENCE 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.

The screenshot shows the 'Routes Summary' page. On the left is a navigation sidebar with sections like 'Collaboration and Approvals', 'Home', 'Issues Summary', 'Shortcuts...', 'Collections', 'Utilities', and 'Routes'. Under 'Routes', there are 'Routes Summary' and 'Route Templates'. The main area displays a table with columns for 'Name', 'Description', and other route details. A blue arrow labeled '2' points to the 'Product_Design-XXX' row, which is highlighted.

3. Select Actions > Restart Route.

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

The screenshot shows a context menu for the 'Product_Design-XXX' route. The menu items are: Properties, Content, Access, Discussions, and a separator line followed by 'Edit Details', 'Set Task Escalation...', 'Save as Template...', 'Restart Route' (which is highlighted with a blue arrow labeled '3'), 'Subscribe...', and 'Push Subscription...'. The 'Properties' tab is selected.

The screenshot shows the 'Properties' page for the 'Product_Design-XXX' route. It includes tabs for 'Properties', 'Content', 'Access', 'Discussions', and 'History'. The 'Properties' tab is active. The route details are listed in a table:

Name	Product_Design-XXX	State	Started
Owner	Anne Taylor	Scope	Data Analysis-XXX
Description	Route for Design Analysis	Template	Route for Design Analysis-XXX
Originated	Oct 21, 2015	Route Base Purpose	Standard
Route Completion Action	Notify Route Owner	Auto Stop On Rejection	Immediate

Complete the Route (1/7)

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

The screenshot shows the 'Tasks' page with a dashed border. At the top, there's a toolbar with icons for filter, search, and other actions. Below it is a table header with columns: Name, Title, Type, State, Instructions, Due Date, and Context. Two tasks are listed:

Name	Title	Type	State	Instructions	Due Date	Context
IT-0000101	Comment	Comment	Assigned	Comment	Oct 22,...	Product_Design-XXX
IT-0000102	Approve the ...	Approve	Complete	Approve the...	Oct 23,...	Route for Workflow Pr...

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

The screenshot shows the 'Edit Task Details' dialog box with a dashed border. It includes fields for Due Date (set to Oct 22, 2015, 5:00 AM), Assignee (Anne Taylor), and Comments (Modified the design). At the bottom are 'Done' and 'Cancel' buttons.

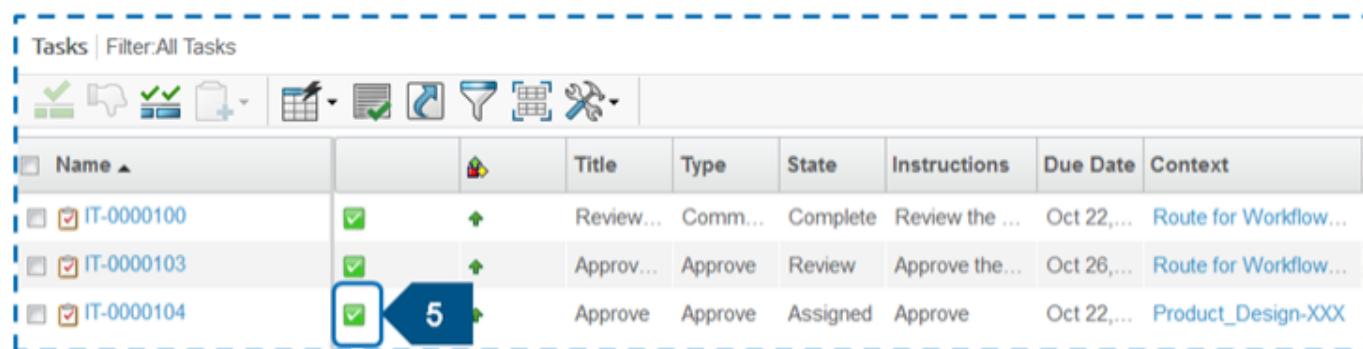
3. Log out of the 3DEXPERIENCE platform.

Complete the Route (2/7)

4. Log in to the 3DEXPERIENCE platform with the following credentials:

- Username or email: [Bronn-XXX]
- Password: [Bronn-XXX]

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



Name			Title	Type	State	Instructions	Due Date	Context
IT-0000100	<input checked="" type="checkbox"/>		Review...	Comm...	Complete	Review the ...	Oct 22,...	Route for Workflow...
IT-0000103	<input checked="" type="checkbox"/>		Approv...	Approve	Review	Approve the...	Oct 26,...	Route for Workflow...
IT-0000104	<input checked="" type="checkbox"/>		Approve	Approve	Assigned	Approve	Oct 22,...	Product_Design-XXX

Complete the Route (3/7)

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

Edit Task Details

Fields in red *italic* are required

Due Date
Oct 22, 2015 5:00 AM Clear

Assignee
Bronn Glover

Comments
Design is OK

Approval Status
 Approve
 Reject
 Abstain

Done **Cancel**



7. Click **Product_Design-XXX**.

Tasks | Filter All Tasks

Name			Title	Type	State	Instructions	Due Date	Context
IT-0000100	<input checked="" type="checkbox"/>		Review	Comment	Complete	Review the...	Oct 22...	Route for Workflow Pr...
IT-0000103	<input checked="" type="checkbox"/>		Approve	Approve	Review	Approve the...	Oct 26...	Route for Workflow Pr...
IT-0000104	<input checked="" type="checkbox"/>		Approve	Approve	Complete	Approve	Oct 22...	Product_Design-XXX

Complete the Route (4/7)

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

The screenshot shows the 3DEXPERIENCE platform interface for a route named "Product_Design-XXX".

Route Details:

Product_Design-XXX		Route for Design Analysis		Owner : Anne-XXX	Modified : 10/21/2015 11:07:45 AM
Route					
Product_Design-XXX		XXX-PrivateCS			

Properties Tab:

Properties		Content	Access	Discussions	History	
Name	Product_Design-XXX			State	Finished	
Owner	Anne Taylor			Scope	Data Analysis-XXX	
Description	Route for Design Analysis			Template	Route for Design Analysis-XXX	
Originated	Oct 21, 2015			Route Base Purpose	Standard	
Route Completion Action	Notify Route Owner			Auto Stop On Rejection	Immediate	

Tasks (Graphical) Tab:

Product_Design-XXX : Tasks (Graphical)

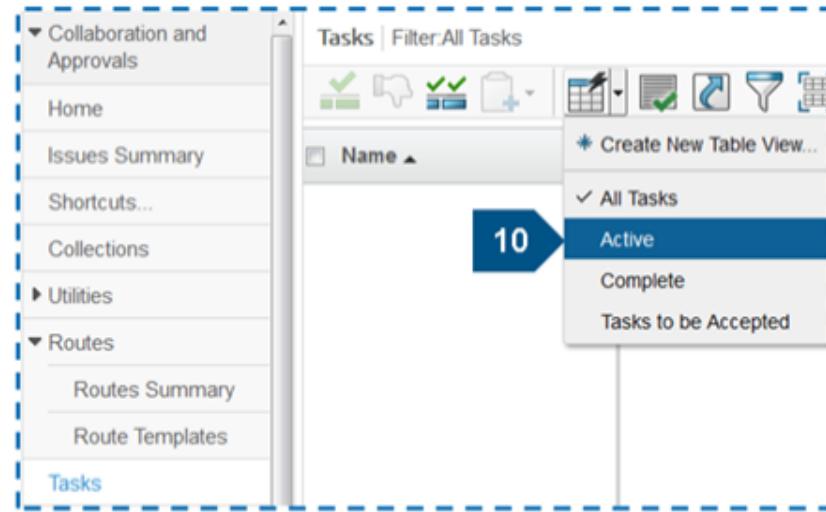
```
graph LR; A[Comment  
Comment  
Anne Taylor  
Oct 22, 2015] --> B[Approve  
Approve  
Bronn Glover  
Oct 22, 2015]; B --> C[Checkered Flag]
```

8. Log out of the 3DEXPERIENCE platform.

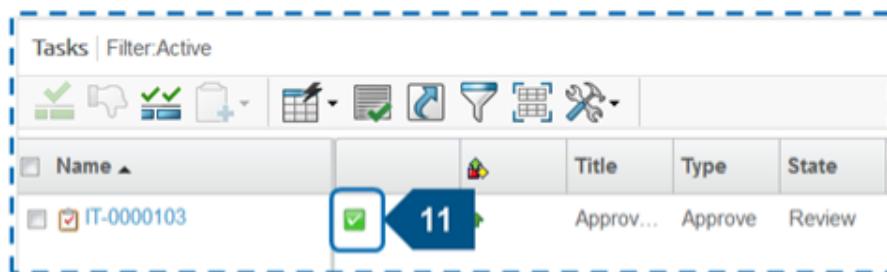
Complete the Route (5/7)

9. Log in to the 3DEXPERIENCE 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.

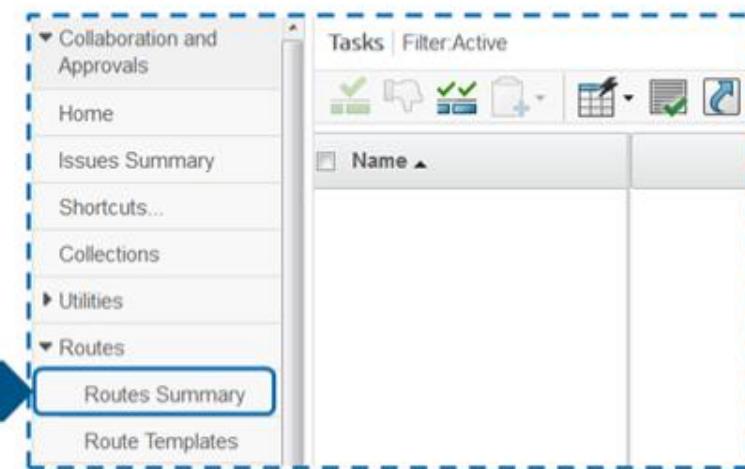


11. Click the Edit Task Details icon.

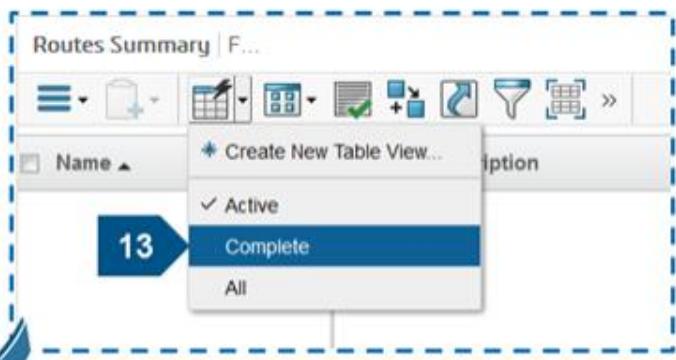


Complete the Route (6/7)

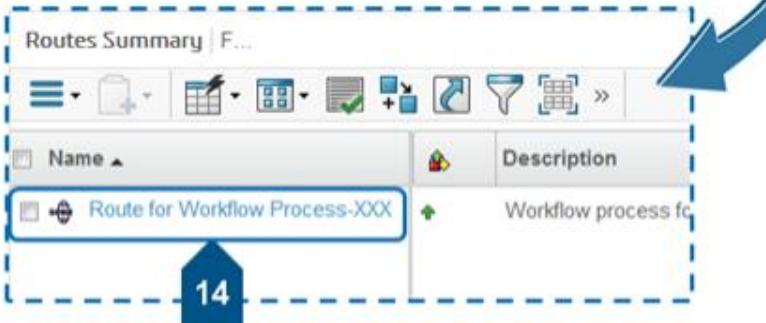
12. Navigate to the **Routes Summary** page.



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.

Route for Workflow Process-XXX Workflow process for the Data Analysis Workspace

Owner : Mark-XXX Modified : 10/21/2015 11:31:48 AM

Route (0000000002) XXX-PrivateCS

Route for Workflow Proce...

Properties Content Access Discussions History

Name	Route for Workflow Process-XXX	State	Finished
Owner	Mark Williams	Scope	Organization
Description	Workflow process for the Data Analysis Workspace	Template	Standard Template-XXX
Originated	Oct 21, 2015	Route Base Purpose	Standard
Route Completion Action	Notify Route Owner	Auto Stop On Rejection	Immediate

Tasks (Graphical) Tasks

Route for Workflow Process-XXX : Tasks (Graphical)

```
graph LR; Start(( )) --> Task1[Review the Process  
Bronn Glover  
Oct 22, 2015]; Task1 --> Task2[Approve the Process  
Anne Taylor  
Oct 23, 2015]; Task2 --> Task3[Approve the Work  
Bronn Glover  
Oct 26, 2015]; Task3 --> End(( ));
```

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:

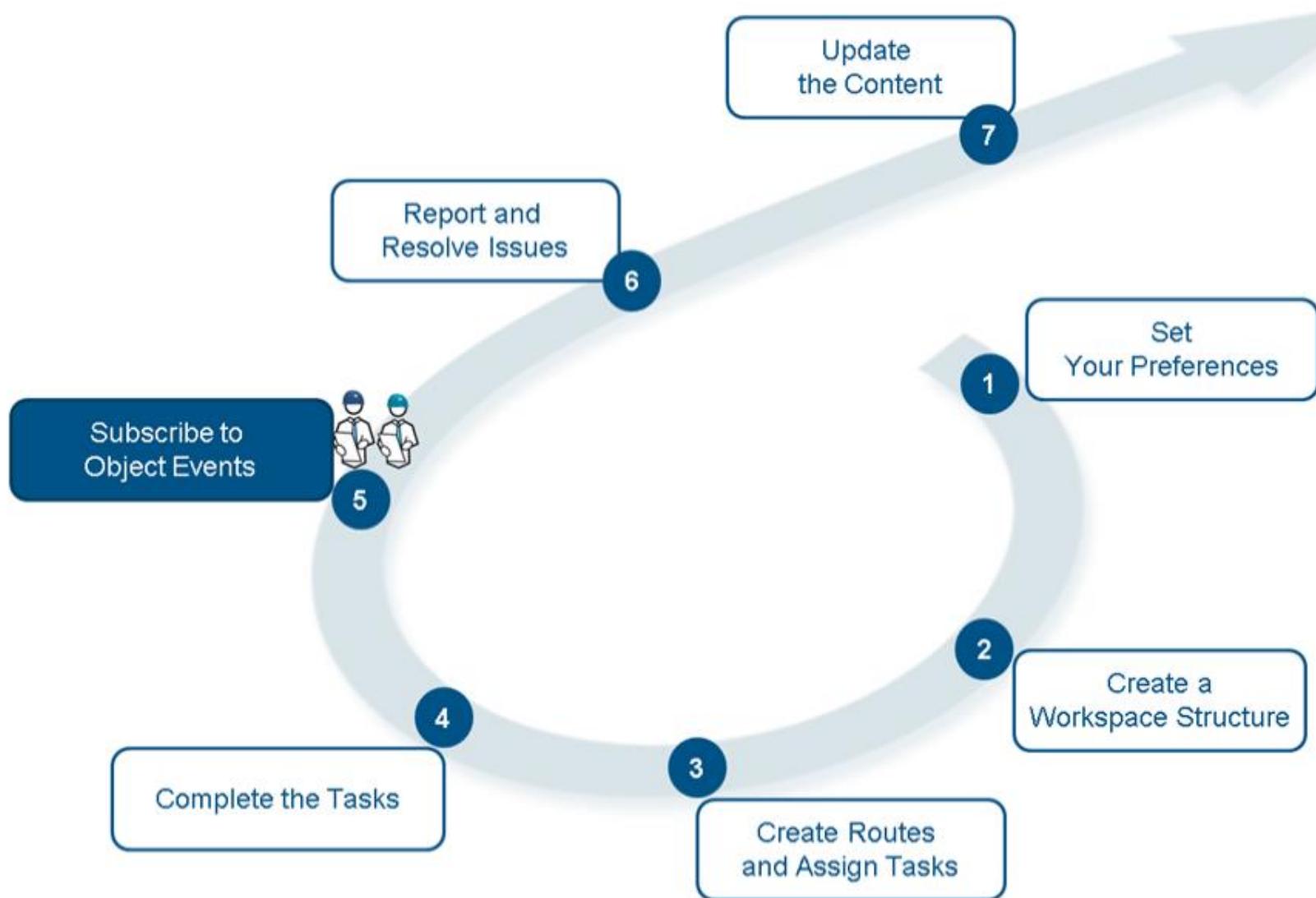
1. Push subscriptions to another person
2. Subscribe to object events
3. Check the subscriptions

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



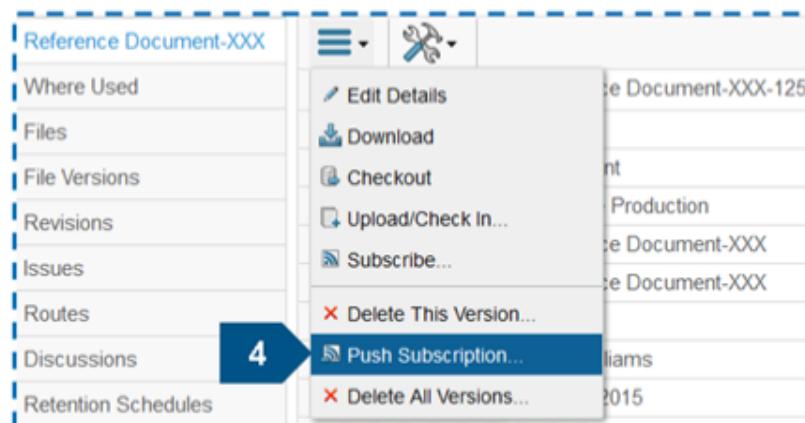
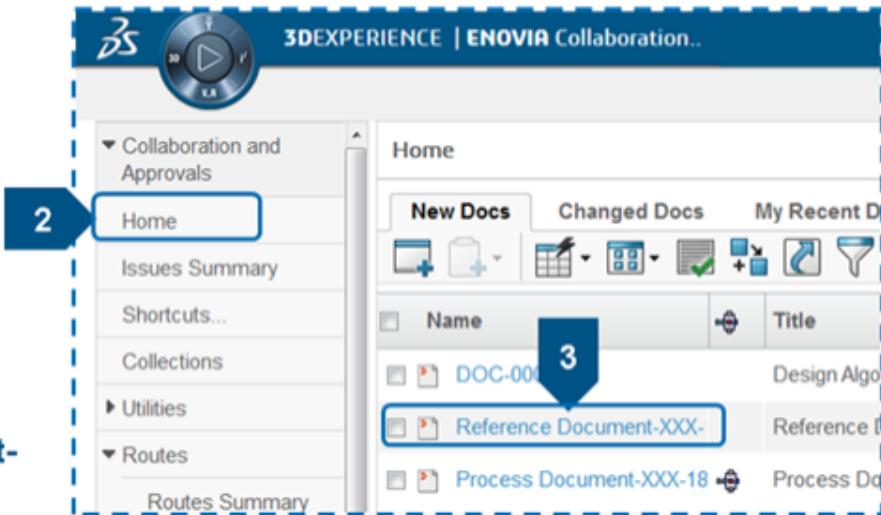
20 minutes

Exercise Progression



Push Subscriptions (1/4)

1. Log in to the 3DEXPERIENCE 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.

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	5	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

6. Click Add Recipients to add the members.



Reference Document-XXX-125407157883 : Push Subscription Recipients

6 

Name	Email Address
No Objects Found	

Push Subscriptions (3/4)

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

Search

Type	Person
User Name	"Anne"
Last Name	*
First Name	*
Organization	*

Limit to 100 results Paginate results

7

8. Select Anne-XXX and click Submit.

Search Results

	Name	First Name	Company Name	Email Address
<input checked="" type="checkbox"/>	Anne-XXX	Anne Taylor		Anne-XXX@3ds.com

Page 1 of 1

8

9. Click Close.

Reference Document...

<input type="button" value="New"/>	<input type="button" value="Open"/>	<input type="button" value="Save"/>	<input type="button" value="Print"/>	<input type="button" value="Find"/>	<input type="button" value="Filter"/>	<input type="button" value="Tools"/>
<input type="checkbox"/> Name	Email Address					
<input type="checkbox"/> Taylor Anne	Anne-XXX@3DS.COM					

Page 1 of 1 9

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 **3DEXPERIENCE** platform.

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	1	1
Document Deleted	0	0

The screenshot shows a document management interface. At the top, there's a header with a blue arrow icon and the text "Reference Document-XXX-125407157883 : Push Subscription". Below the header is a table with columns for "Subscription Events", "Push Subscription Recipients", and "Subscription Recipients". The table shows data for Content Added, Content Modified, Content Deleted, Content Checkout (with a value of 1), and Document Deleted. A large blue circle with the number 10 is overlaid on the right side of the table. In the center, there's a list of actions for a document: "Edit Details", "Download", "Checkout" (which is highlighted in blue), "Upload/Check In...", and "Subscribe...". A large blue arrow points from the "Checkout" button down to a list of files below. The list includes "Reference Document-XXX", "Where Used", "Files", "File Versions", "Revisions", and "Issues". At the bottom, there's a table with columns "File Name", "Ver", and "Originated". One row in the table has a checked checkbox and a file icon, corresponding to "Charting Concepts.docx". A large blue circle with the number 11 is overlaid on the right side of the table.

Check for the Updates

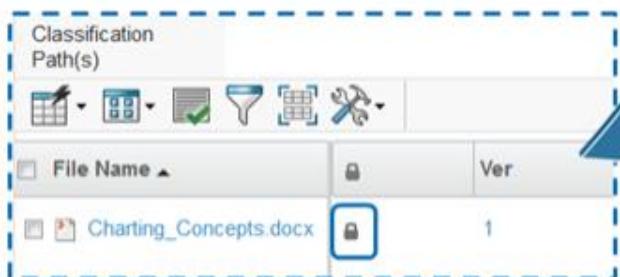
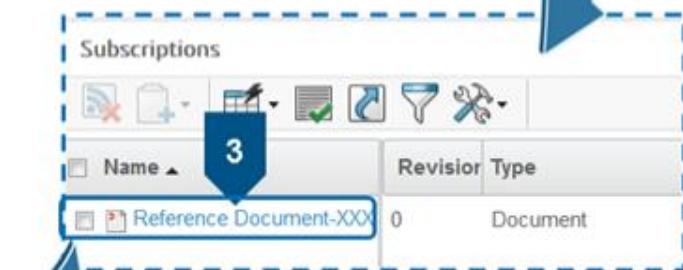
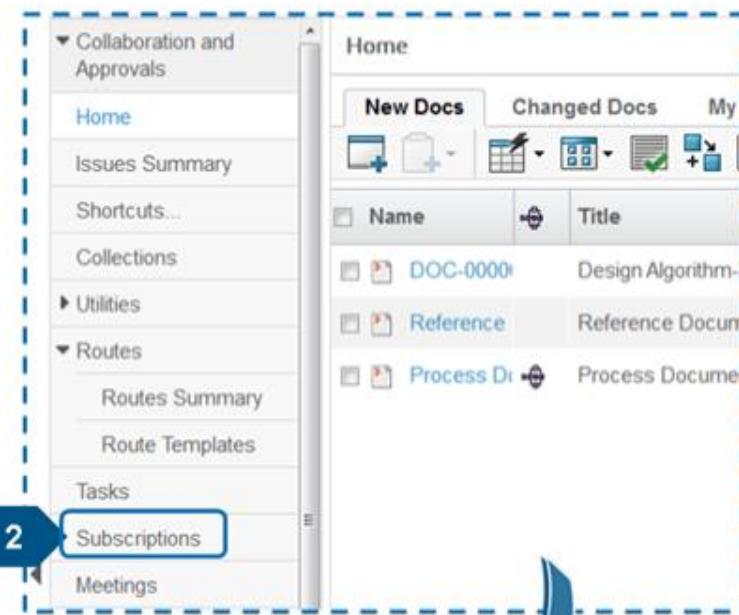
1. Log in to the 3DEXPERIENCE platform with the following credentials:
 - a. Username or email: [Anne-XXX]
 - b. Password: [Anne-XXX]

2. In the My Desk menu, select Subscriptions.

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

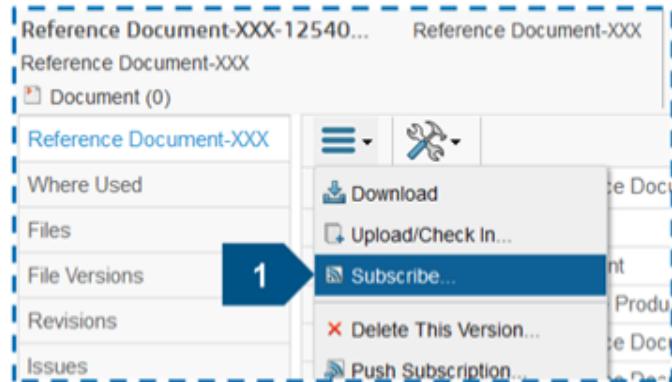
3. Click the Reference Document-XXX subscription's name.

You can view that the document is checked out.

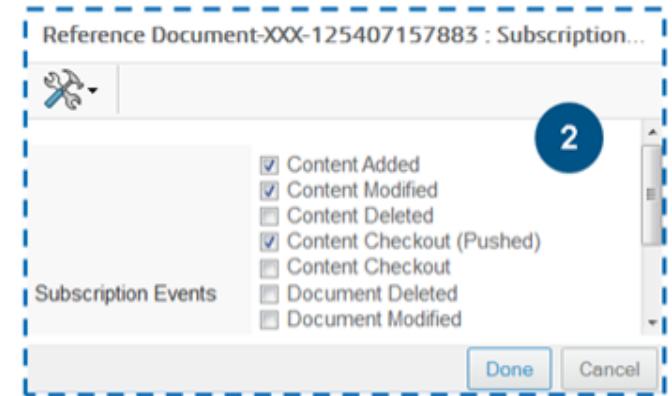


Subscribe to Object Events

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



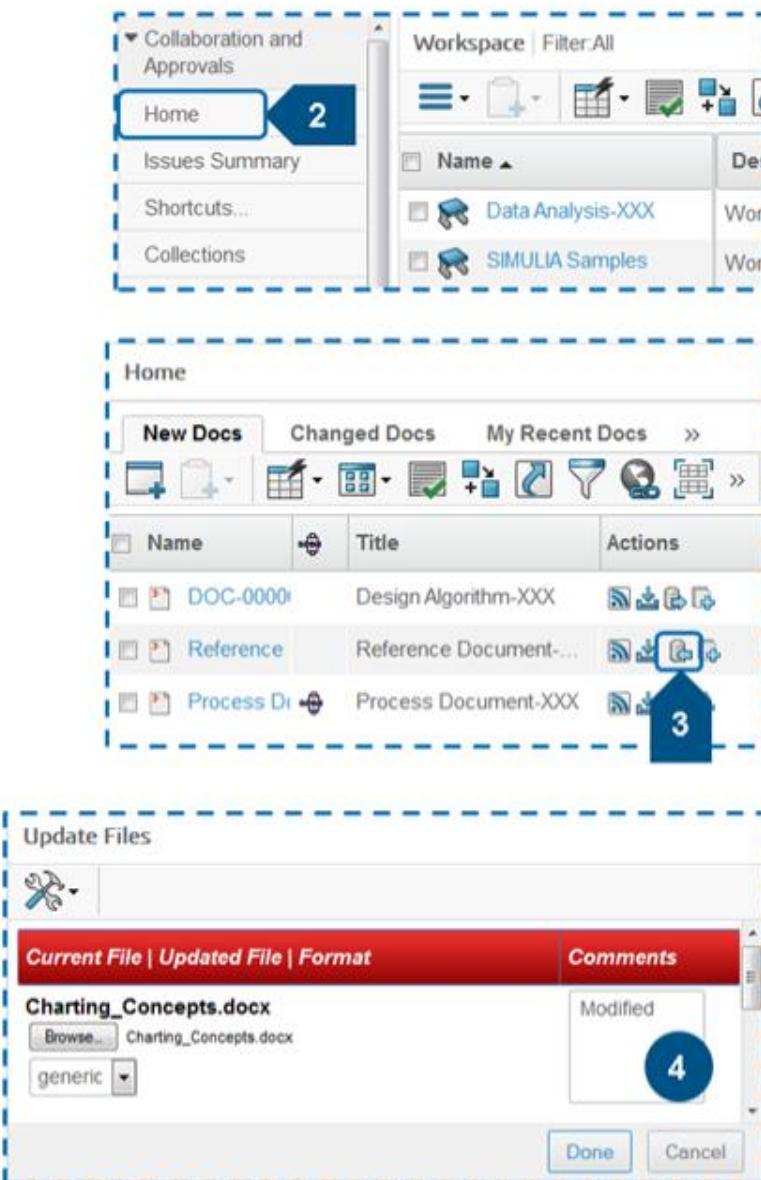
2. Select the **Content Added** and **Content Modified** options, and click **Done**.



3. Log out of the **3DEXPERIENCE** platform.

Check In the Updated File

1. Log in to the 3DEXPERIENCE 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 3DEXPERIENCE platform.



Check the Subscriptions

1. Log in to the 3DEXPERIENCE 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.

The screenshot shows the 3DEXPERIENCE platform interface. On the left, there is a vertical sidebar with a dashed blue border containing the following menu items:

- Collaboration and Approvals
- Home
- Issues Summary
- Shortcuts...
- Collections
- Utilities
- Routes
- Routes Summary
- Route Templates
- Tasks

To the right of the sidebar is the main content area, also enclosed in a dashed blue border. The title "Subscriptions" is at the top. Below it is a toolbar with several icons. To the right of the toolbar is a circular badge with the number "2". The main content is a table with the following data:

Name	Revision	Type	Description	Event
Reference Document-XXX-1	0	Document	Reference Document-XXX	Content Checkout
Reference Document-XXX-1	0	Document	Reference Document-XXX	Content Added
Reference Document-XXX-1	0	Document	Reference Document-XXX	Content Modified

3. Log out of the 3DEXPERIENCE 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

Properties	
Change Type	<input type="button" value="Close"/>
Name	ISS-0000001
Type	Issue
Description	Issue in the workflow process
State	Create
Last State Change	Oct 7, 2015
Owner	Bronn Glover

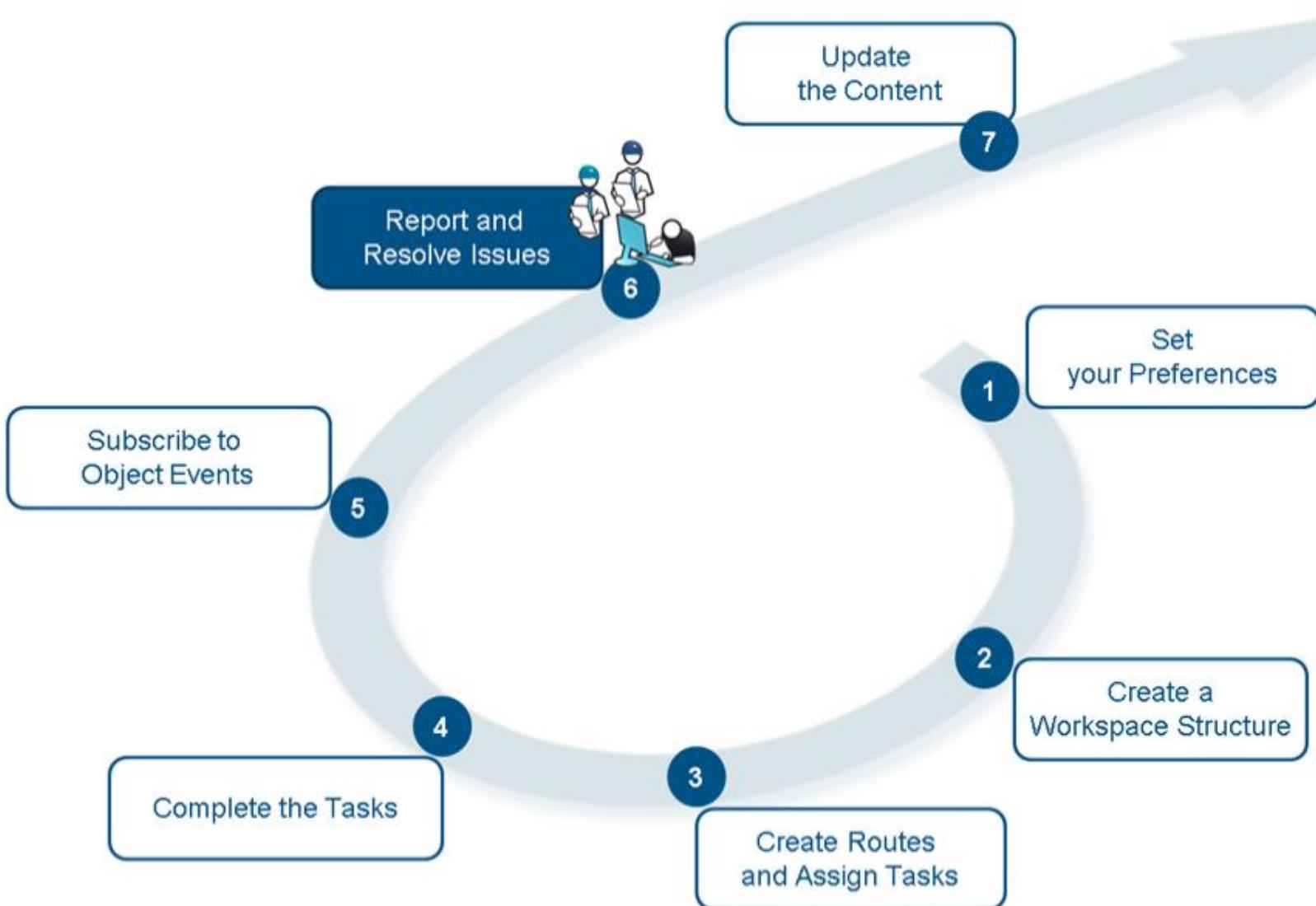
Assignees

Name	User



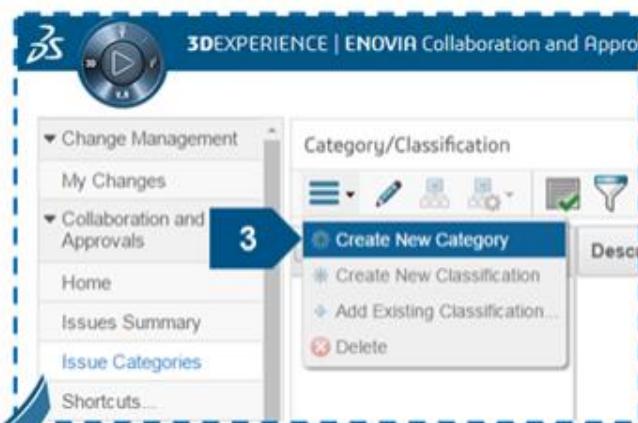
45 minutes

Exercise Progression



Create an Issue (1/4)

1. Log in to the 3DEXPERIENCE 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.



The screenshot shows the 'Create Category' dialog box. It has fields for Type (Issue Category), Name (Workflow Process-XXX), and Description (Issue category for workflow processes). At the bottom are buttons for Apply, Done, and Cancel. A blue circle labeled '4' is positioned over the 'Description' field.

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 **3DEXPERIENCE** platform.

The screenshot illustrates the process of creating a new issue classification in the 3DEXPERIENCE platform. It is divided into three main sections:

- Top Left:** A sidebar menu with options like Change Management, My Changes, Collaboration and Approvals, Home, Issues Summary, and Issue Categories. The "Workflow Process-XXX" checkbox is selected under Issue Categories, highlighted with a blue circle labeled **5**.
- Middle Left:** A context menu from the Actions button with options: Create New Category, **Create New Classification** (highlighted with a blue circle labeled **6**), Add Existing Classification..., and Delete.
- Bottom Right:** A detailed view of the "Workflow Process-XXX|Create Cl..." dialog. It shows:
 - Type: Issue Classification
 - Name: Route Workflow-XXX
 - Description: All issues in route workflow
 - Issue Owned By: Johnson XavierA large blue arrow points from the "Description" field in the dialog to the "Description" field in the sidebar menu. Another blue arrow points from the "Issue Owned By" field in the dialog to the "Issue Owned By" field in the sidebar menu.

Create an Issue (3/4)

9. Log in to the 3DEXPERIENCE platform with the following credentials:

- Username or email: [Bronn-XXX]
- Password: [Bronn-XXX]

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

11. Specify the following details, and click Done.

- Description: [Issue in the workflow process]
- Reported Against: Route for Workflow Process-XXX
- Estimated Start: (Specify today's date)
- Estimated Finish: (Specify a date that comes after two days from today)
- Priority: High
- Problem Type: Functionality
- Resolution Recommendation: [A review in the workflow from Anne is required]
- Category/Classification : Route Workflow-XXX.

The screenshot shows the 'Create New Issue' dialog box. The 'Type' field is set to 'Issue'. The 'Description' field contains 'Issue in the workflow process'. The 'Reported Against' field is set to 'Route for Workflow Prc'. The 'Escalation Required' field has 'No' selected. The 'Estimated Start' and 'Estimated Finish' fields show dates from December 5, 2016, to December 8, 2016. The 'Priority' is set to 'High' and the 'Problem Type' is 'Functionality'. The 'Resolution Recommendation' field contains the text 'A review in the workflow from Anne is required'. The 'Steps To Reproduce' field is empty. At the bottom of the dialog are buttons for 'Clear All', 'Create Issue', 'Done', and 'Cancel'. A blue arrow labeled '10' points to the 'Create Issue' button in the top bar, and a blue circle labeled '11' points to the 'Done' button at the bottom of the dialog.

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**.

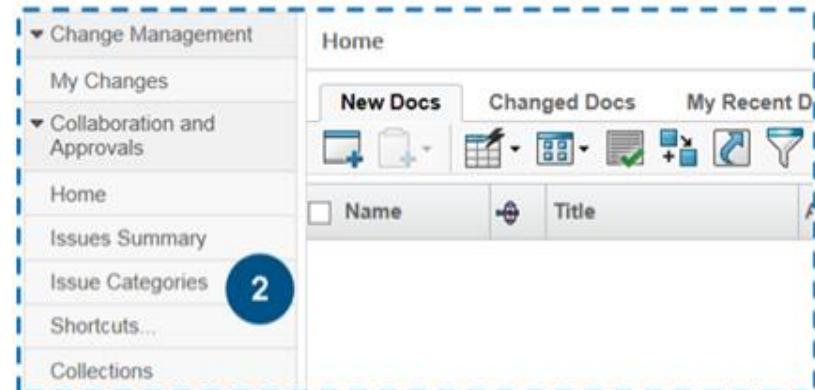
The screenshot shows the 'Properties' dialog box for an issue named 'ISS-0000004'. The 'Owner' field is highlighted with a blue circle containing the number 12, showing 'Johnson Xavier'. Other fields include 'Type: Issue', 'Description: Issue in the route workflow process', 'State: Create', 'Last State Change: Dec 5, 2016', 'Originator: Glover Bronn', and 'Originated Date: Dec 5, 2016'. To the right of the dialog is a 'Assignees' tab with a large blue arrow pointing to it, and a small blue circle containing the number 13.

The screenshot shows a search results dialog box with 318 results. A large blue arrow points from the 'Assignees' tab in the previous screenshot to this dialog. The results list includes entries for 'Bronn-XXX', 'Anne-XXX', 'Mark-XXX', and 'Xavier-VILAS'. At the bottom right of the dialog are 'OK' and 'Cancel' buttons, with a small blue circle containing the number 14 pointing to the 'OK' button.

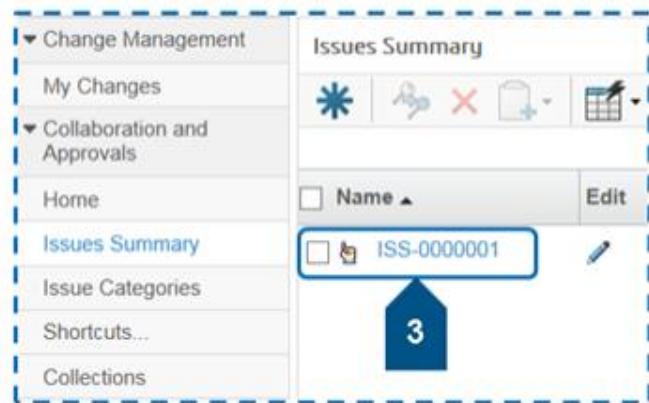
Name	User Name	Company
Taylor Anne	Anne-XXX	MyCompany
Williams Mark	Mark-XXX	MyCompany

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

1. Log in to the 3DEXPERIENCE 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**.

Properties	
Change Type	Close
Name	ISS-0000001
Type	Issue
Description	Issue in the workflow proc
State	Create
Last State Change	Oct 7, 2015
Owner	Bronn Glover
Originator	Bronn-XXX
Originated Date	Oct 7, 2015
Modified Date	Oct 7, 2015

5. Click **Promote**.

Lifecycle

ISS-0000001 rev -: Lifecycle

☰ 5 ⌂

Create → Assign → Active

Lifecycle

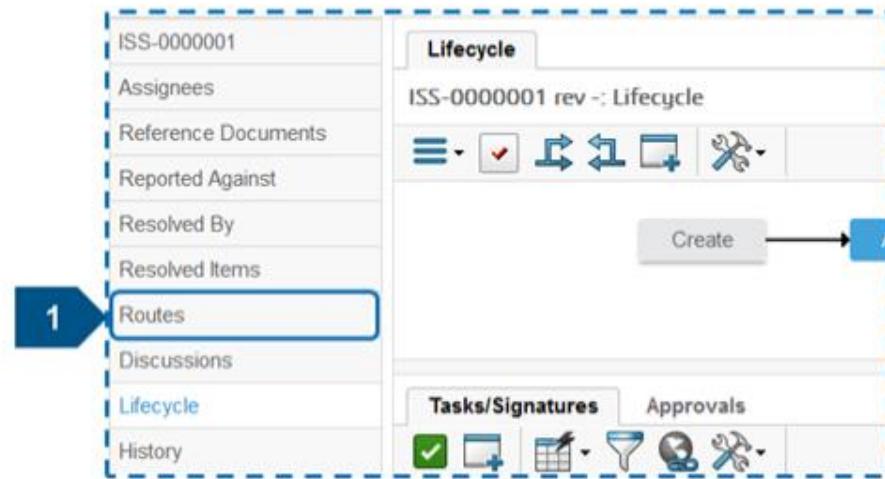
ISS-0000001 rev -: Lifecycle

☰ ⌂

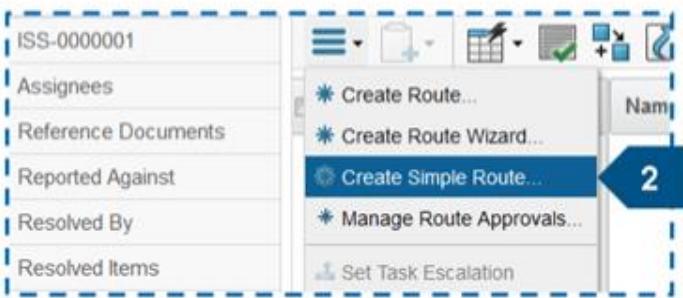
Create → Assign → Active

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)**.

Create Simple Route

Add Content Remove Selected

Fields in red italics are required.

Route Details

Instructions: **Approve**

Action: **Approve**
Due Date: **Oct 9, 2015**
 Start Route Immediately
 Allow Delegation

Route Task Recipients

Taylor, Anne

Add Role
 Add Group
 Add People
 Add Member List

Properties Remove

Content

Name	Rev	Ver	State Condition
ISS-0000001	-		Assign
Process Document-XXX	0	1	IN_WORK

Done **Cancel**



Name	Route Status
PR-0000100	Started

4. Log out of the 3DEXPERIENCE platform.

Change the Task Assignee (1/2)

1. Log in to the 3DEXPERIENCE 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.

Name	Icon	Title	Type	State	Instructions	Due Date	Context
IT-0000101	Comment	Comment	Comment	Complete	Comment	Oct 7, ...	Product_L...
IT-0000102	Approve	Approve the...	Approve	Complete	Approve the...	Oct 8, ...	Route for...
IT-0000105	Approve	IT-0000105	Approve	Assigned	Approve	Oct 9, ...	R-000010...

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

Properties	
Message	
Originated	Nov 18, 2016 10:48:10 AM
Allow Delegation	Yes
Routes	R-0000100
Approval Status	Awaiting Approval
Task Requirement	Optional
Comments	

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.

Properties	
Message	Route Owner
Originated	Nov 18, 2016 10:48:10 AM
Allow Delegation	No
Routes	R-0000100
Approval Status	Awaiting Approval
Task Requirement	Optional
Due Date	Nov 21, 2016 5:00:00 AM
Assignee	Williams Mark
Action	Comment
State	Assigned
Instructions	Approve

IT-0000103:Change Assignee

Fields in red *italic* are required

Due Date
Nov 21, 2016 5:00 AM

Assignee
Taylor Anne

Update Assignee

Person
 Group

New Assignee
Williams Mark

Reassignment Comments
Please check and approve

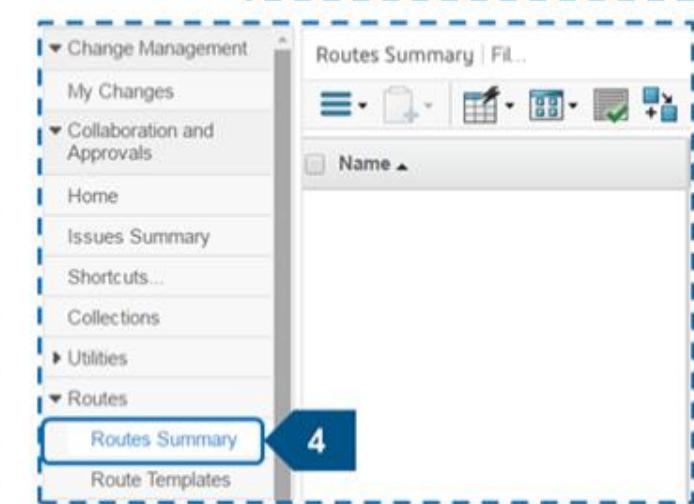
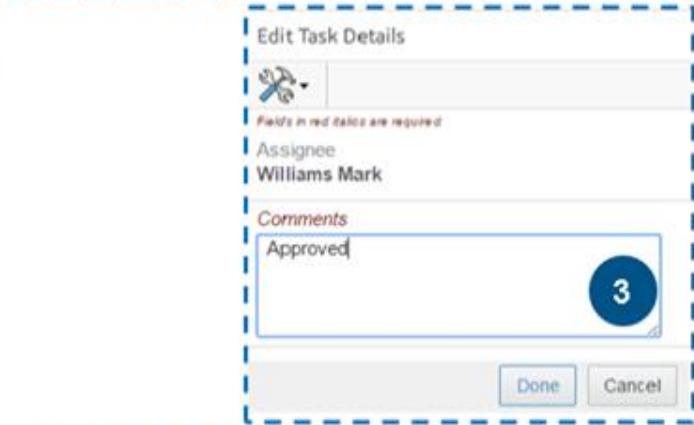
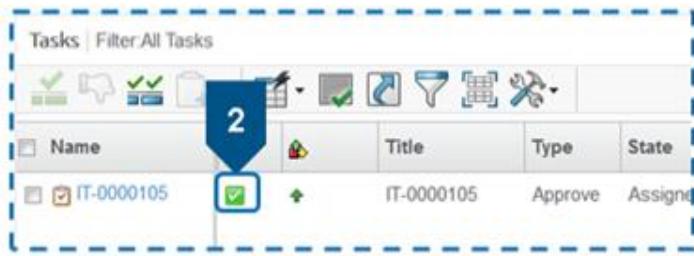
5

Done Cancel

6. Log out of the 3DEXPERIENCE platform.

Resolve the Issue (1/2)

1. Log in to the 3DEXPERIENCE 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)

- Click the route name.

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

- Log out of the 3DEXPERIENCE platform.

The screenshot shows two overlapping windows from the 3DEXPERIENCE platform:

- Routes Summary**: A list of routes. The route "R-0000101" is selected and highlighted with a blue border. Other routes listed are "R-0000100" and "Route for Workflow Process-XXX".
- Route Properties**: Details for the selected route "R-0000101".

Name	R-0000101	State	Finished
Owner	Glover Bronn	Scope	All
Description		Template	
Originated	18-Nov-2016	Route Base Purpose	Standard
Route Completion Action	Notify Route Owner	Auto Stop On Rejection	Immediate
- Tasks (Graphical)**: A graphical representation of the route steps. It shows a sequence of three green rounded rectangles connected by arrows. The first step has a small icon of a person with a checkmark. The second step contains the text: "Comment IT-0000104 Williams Mark 18-Nov-2016". The third step has a small icon of a person with a checkmark.

Close the Issue (1/2)

1. Log in to the 3DEXPERIENCE 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.

ISS-0000001	Properties		
Assignees	Change Type	Close	
Reference Documents			
Reported Against			
Resolved By			
Resolved Items			
Routes			
Discussions			
Lifecycle			
	Name	ISS-0000001	
	Type	Issue	
	Description	Issue in the workflow proce	
	State	Assign	
	Last State Change	Nov 18, 2016	
	Owner	Glover Bronn	
	Originator	Glover Bronn	
	Originated Date	Nov 18, 2016	

	Name	Route Status	Due Date
	RR-0000100	Finished	Nov 21, 2016

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)

The screenshot shows the 'Properties' page for issue 'ISS-0000001'. The 'Change Type' field is set to 'Issue'. The 'Close' button is highlighted with a blue arrow labeled '5'. Other fields include 'Name' (ISS-0000001), 'Type' (Issue), and 'Description' (Issue in the workflow).

The screenshot shows the 'Close ISS-0000001' dialog. It contains three text input fields: 'Action Taken' (Process Document reviewed by Anne), 'Resolution Statement' (Workflow documents to be approved and reviewed by Mark), and 'Resolution Date' (Oct 8, 2015). A blue arrow labeled '6' points from the bottom of the previous screenshot to the 'Resolution Date' field.

The screenshot shows the 'Properties' page for issue 'ISS-0000001'. The 'State' field is now set to 'Closed'. Other fields remain the same as in the previous screenshots.

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

The screenshot shows a user interface for managing documents. On the left, there is a sidebar with the following items:

- Compliance Document-XXX
- Files
- File Versions
- Revisions
- Issues
- Routes

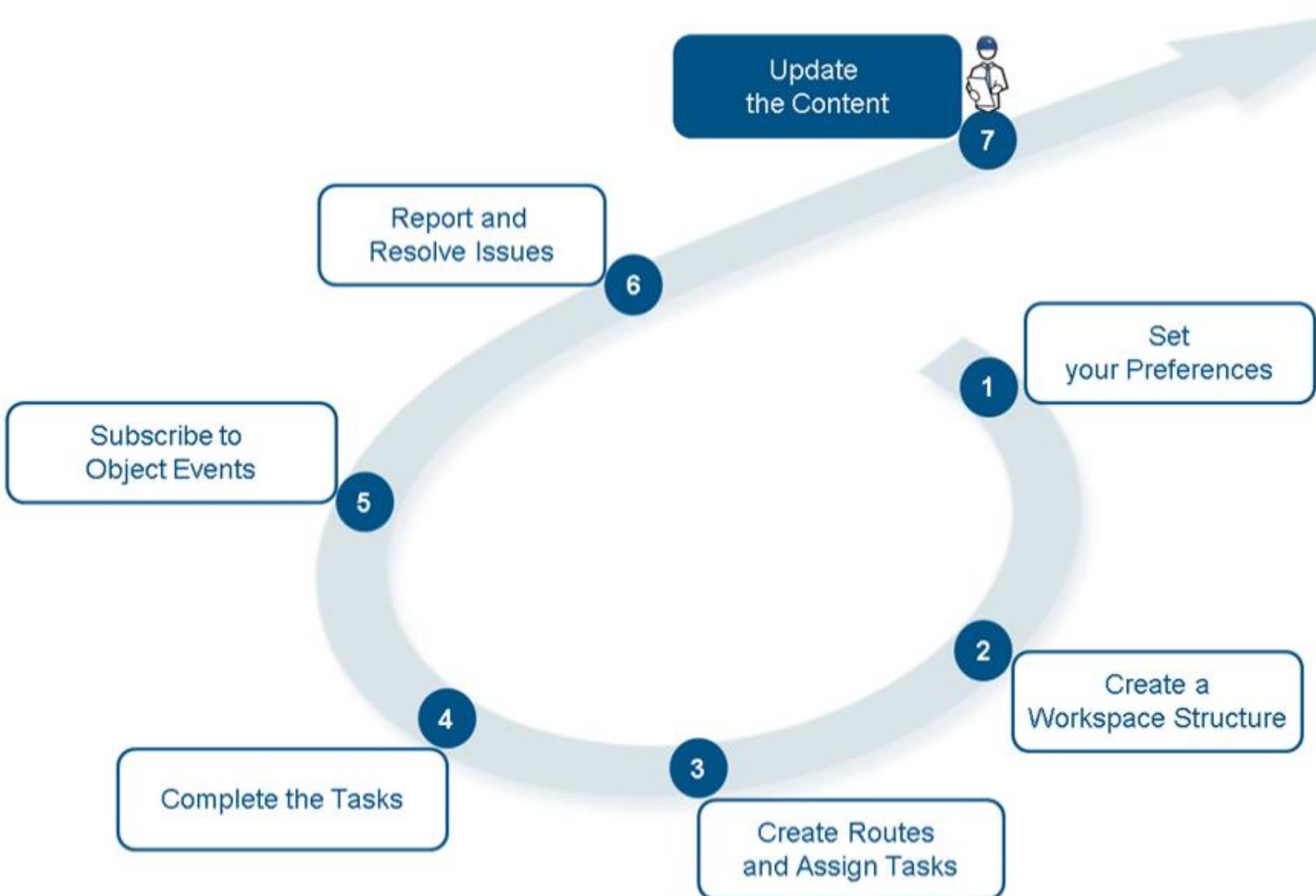
On the right, there is a main panel with a table titled "Name" and columns for "Title" and "Revision". The table contains two rows of data:

Name	Title	Revision
Compliance Document-XXX-104302640266	Compliance Document-XXX	0
Compliance Document-XXX-104302640266	Compliance Document-XXX	1



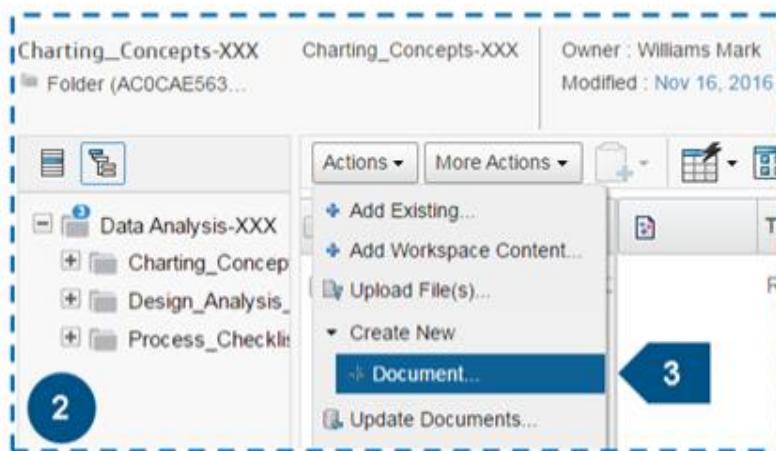
25 minutes

Exercise Progression



Create a new Document (1/2)

1. Log in to the 3DEXPERIENCE 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]



A screenshot of the 'Step 1 of 2:Specify Details' dialog box. The title bar says 'Step 1 of 2:Specify Details'. Below it, a note says 'Fields in red *italics* are required.' There are several input fields:

- Name:
- Type:
- Policy:
- Title:
- Description:

At the bottom right are 'Next' and 'Cancel' buttons, with 'Next' being highlighted. A blue circle with the number '4' is located in the bottom right corner of the dialog box.

Create a new Document (2/2)

- Upload the document *Compliance_Data.xlsx* from the location *C:\BUPS_R2017x\Data*, and click **Done**.

Step 2 of 2: Upload Files

File | Format Comments

Browse... Compliance_Data.xlsx generic

generic

Previous Done Cancel

5

Owner : Williams Mark
Modified : Nov 16, 2016 2:46:46 PM

Drop files here Reference Document...

Actions More Actions

Name	Title	Type	Rev	Ver	Actions
Compliance Document-XXX-1	Compliance...	Document	0	1	
Reference Document-XXX-19	Reference...	Document	0	2	

3DS



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**.

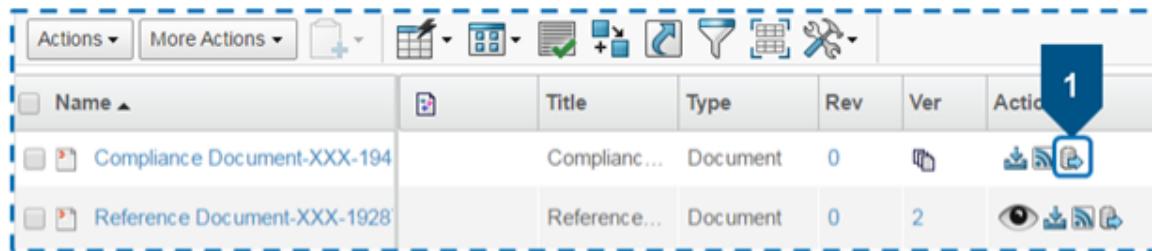
The screenshot shows the 'Charting_Concepts-XXX' page. A blue arrow labeled '1' points to the 'Actions' button in the toolbar. A dropdown menu is open, showing options: 'Name ▾', 'Compliance Document-XXX-194...', 'Compliance Document-XXX', 'Document (0)', 'Compliance Document-XXX', 'Files', 'File Versions', 'Revisions', 'Issues', and 'Routes'. The 'Upload/Check In...' option is highlighted with a blue box.

The screenshot shows the 'Compliance Document-XXX' page. A blue arrow labeled '2' points to the 'Upload/Check In...' button in the toolbar. A modal dialog box titled 'Checkin Files' is open, showing a red bar at the top with 'File | Format'. The 'File Name' field contains 'RoHS_Details.pptx'. A blue arrow labeled '3' points to the 'Done' button in the bottom right corner of the dialog.

The screenshot shows the 'Compliance Document-XXX' page. A blue arrow labeled '3' points to the 'Done' button in the bottom right corner of the 'Checkin Files' dialog. The 'File Versions' section shows a table with two rows: 'Compliance Data.xlsx' (Version 1, Last modified Nov 18, 2016) and 'RoHS_Details.pptx' (Version 1, Last modified Nov 18, 2016).

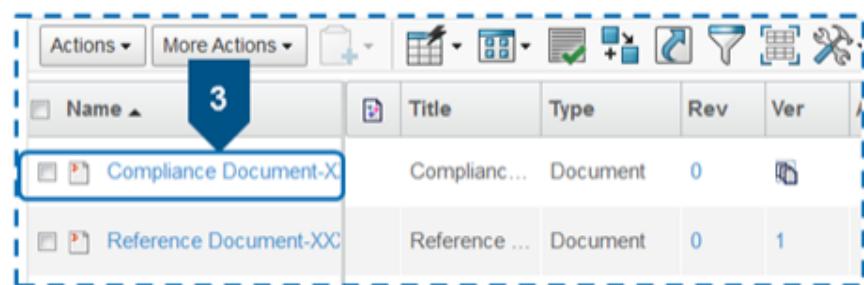
Check Out Files from a Document (1/2)

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

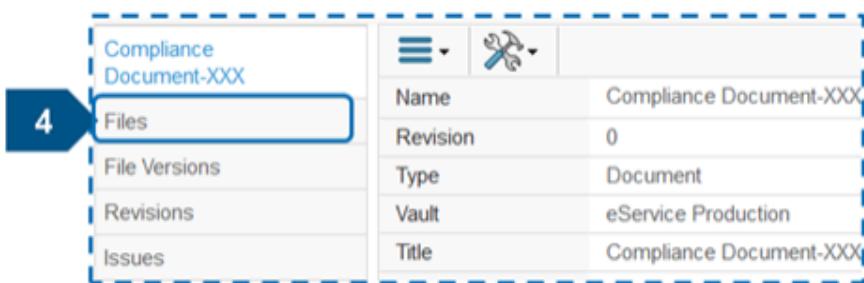


2. Select the **Save As** option and save the document as *Compliance_Documents_XXX1*.
The document will be saved as a zipped folder.

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.

The screenshot shows a document management interface with a dashed blue border. At the top, there are two document cards: "Compliance Document-XXX-194..." and "Compliance Document-XXX". Below them is a summary bar with "State : Private" (selected), "In Work" (highlighted in blue), and "Frozen" buttons; "Owner : Williams Mark"; and "Modified : Nov 18, 2016 12:48:25 PM". To the right are various icons for file operations. A sidebar on the left lists "Document (0)", "Compliance Document-XXX", "Files", "File Versions", "Revisions", and "Issues". The main area features a toolbar with filters and a table. The table has columns: File Name, Ver, Originated, Comments, Originator, Format, File Size, and Actions. It contains two rows: "Compliance_Data.xlsx" (version 1, originated 18-Nov-2016 12:31:18, by Williams Mark, generic, 8.51 KB) and "RoHS_Details.pptx" (version 1, originated 18-Nov-2016 12:48:25, by Add Document, generic, 26.92 KB). The "Actions" column for both files shows a lock icon, indicating they are checked out. The entire interface is set against a light gray background.

File Name	Ver	Originated	Comments	Originator	Format	File Size	Actions
Compliance_Data.xlsx	1	18-Nov-2016 12:31:18		Williams Mark	generic	8.51 KB	
RoHS_Details.pptx	1	18-Nov-2016 12:48:25	Add Document	Williams Mark	generic	26.92 KB	

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.xlsx** to upload the updated files.

File Name	Ver	Originated	Comments	Originator	Format	File Size	Actions
Compliance_Data.xlsx	1	18-Nov-2016 12:31:18		Williams Mark	generic	8.51 KB	
RoHS_Details.pptx	1	18-Nov-2016 12:48:25	Add Document	Williams Mark	generic	26.92 KB	

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

Update Files

Current File | Updated File | Format Comments

Compliance_Data.xlsx

generic

Modified

Done Cancel

Check In the Updated Files (2/2)

- 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	

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

Observe that the versions are updated.

- Compliance Document-XXX
- Files
 - File Versions
 - Revisions
 - Issues
 - Routes

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**.

The screenshot shows a list of documents in a grid view. Two documents are selected: 'Compliance Document-XXX' and 'Reference Document-XXX-1'. A context menu is open on the right, with the 'Mass Promote' option highlighted and numbered '2'. Other options in the menu include 'Trigger Validation', 'Compare', 'Export', 'Print friendly', 'Multi Column Sorting', and 'Mass Demote'. A blue arrow points from the 'Mass Promote' option to a callout box.

Name	Title	Type
Compliance Document-XXX	Compliance...	Document
Reference Document-XXX-1	Reference ...	Document

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

A modal dialog box titled 'Mass Promote/Demote Error Report' is shown. It displays the message '2 of 2 object(s) successfully completed. 0 object(s) Failed.' A blue arrow points from the dialog box to a callout box.

https://visgpril67plp.ux.dsone.3ds.co... DSpace/common/emxErrorReportD...

Mass Promote/Demote Error Report
Error Report Dialog

2 of 2 object(s) successfully completed. 0 object(s) Failed.

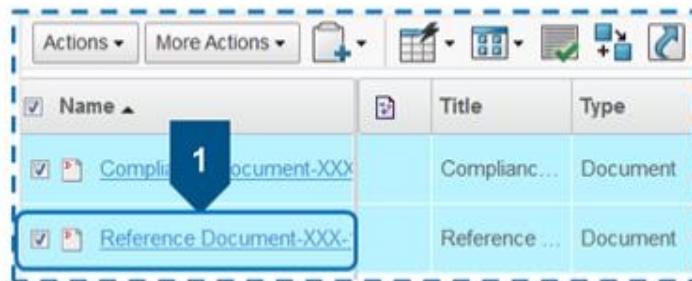
Close

The screenshot shows the same list of documents after promotion. Both 'Compliance Document-XXX' and 'Reference Document-XXX-1' now have their 'State' column labeled 'Released'. A blue arrow points from the 'Released' state indicator to a callout box.

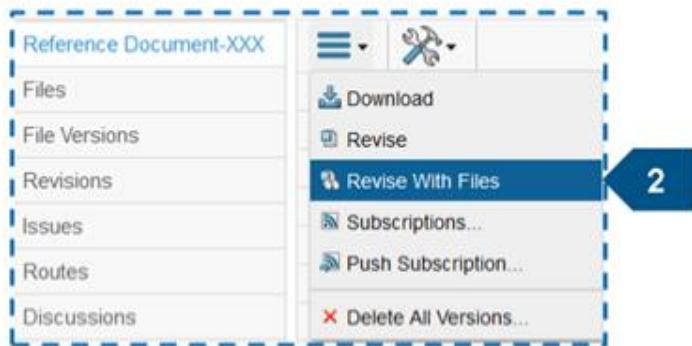
Name	Ver	Actions		Description	State		
Compliance Document-XXX	1			0/2	Compliance Document-XXX	Released	
Reference Document-XXX-1	1				0/1	Reference Document-XXX	Released

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

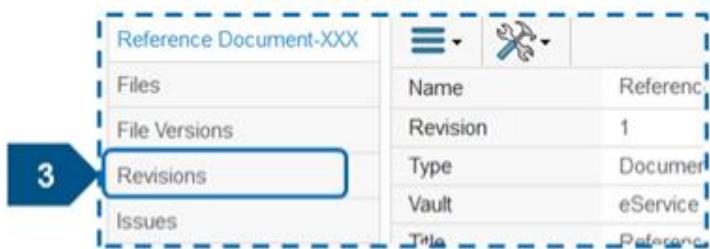
1. Click Reference Document-XXX.



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)

- 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.

The screenshot shows a user interface for managing documents. At the top, there is a toolbar with icons for search, filter, and other operations. Below it is a table listing documents:

Name	Title	Revision	Description	State
Reference Document-XXX-14028278569	Reference Document-XXX	0	Reference Document-XXX	Released
Reference Document-XXX-14028278569	Document-XXX	1	Reference Document-XXX	In Work

A blue arrow labeled '4' points to the second row in the table, indicating the selected document. A large blue arrow points from the table down to the detailed view of the selected document.

The detailed view on the left includes:

- Reference Document-XXX
- Access
- Where Used
- Files
- File Versions
- Revisions
- Issues
- Routes
- Discussions
- Retention Schedules
- Lifecycle
- Multiple Ownership Access
- History
- Classification

The main area shows the document content with a "Pending Release" status. A context menu is open over the content area, containing the following options:

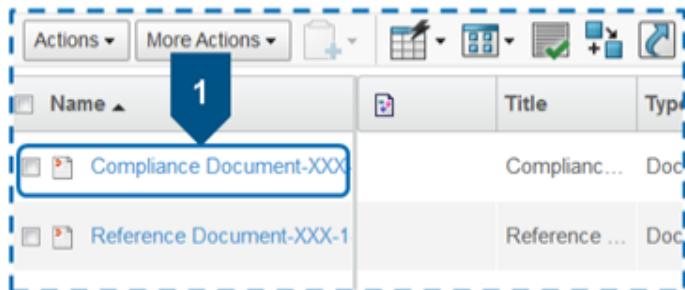
- Edit Details
- Download
- Checkout
- Upload/Check In...
- Subscribe...
- Delete This Version...
- Push Subscription...
- Delete All Versions...

At the bottom, there is a file list:

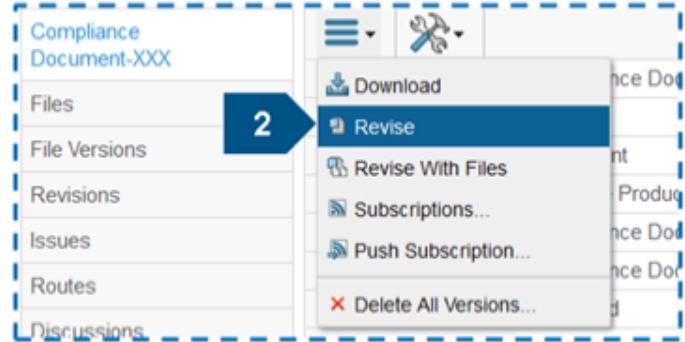
File Name	Ver
Charting_Concepts.docx	1

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

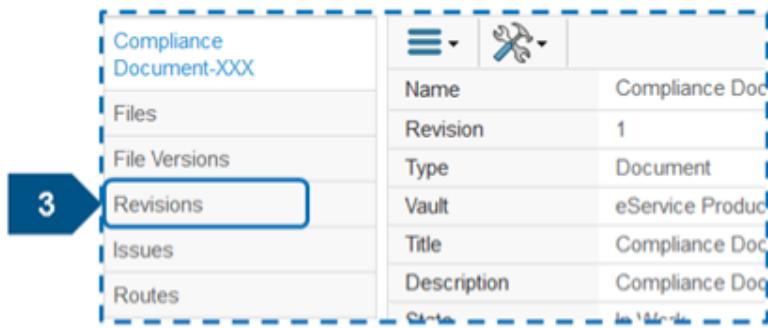
1. Navigate to **Compliance Document-XXX**.



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)

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

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

The screenshot shows a document management interface with a list of documents and a detailed view of a specific document.

List View:

Name	Title	Revision	Description	State
Compliance Document-XXX-104302640266	Compliance Document-XXX	0	Compliance Document-XXX	Released
Compliance Document-XXX-104302640266	Compliance Document-XXX	1	Compliance Document-XXX	In Work

A blue box highlights the second row, and a blue arrow labeled '4' points to it, indicating the number of revisions.

Detail View:

Document Properties:

- State: In Work
- Owner: Williams Mark
- Modified: Nov 18, 2016 3:19:23 PM

Document Content:

- Name: Compliance Document-XXX-19452476326
- Revision: 1
- Type: Document
- Vault: eService Production
- Title: Compliance Document-XXX
- Description: Compliance Document-XXX
- State: In Work
- Owner: Williams Mark
- Originated: 18-Nov-2016
- Modified: 18-Nov-2016
- Policy: Document Release
- Access Type: Inherited
- Classification: Path(s)

Navigation pane on the left:

- Compliance Document-XXX
- Where Used
- Files
- File Versions
- Revisions
- Issues
- Routes
- Discussions
- Retention Schedules
- Lifecycle
- Multiple Ownership Access
- History
- Classification
- Referenced By
- Images

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

Appendix

Company Profile Management (1/6)

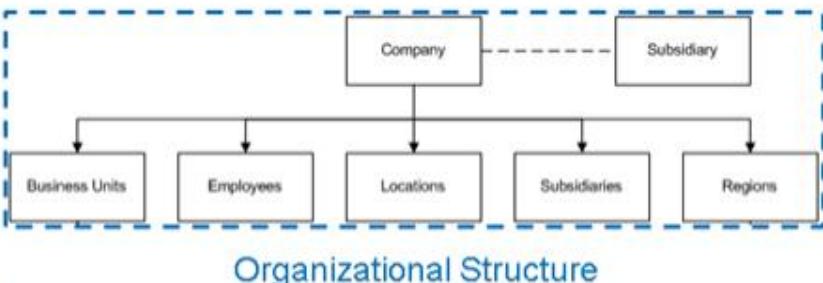
Company Profile Management deals with managing the process flow in a company.

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**.



The screenshot shows the 3DEXPERIENCE | ENOVIA Collaboration and Approvals interface. The top navigation bar includes a play button icon and the text "3DEXPERIENCE | ENOVIA Collaboration and Approvals". The left sidebar has a tree view with "Experience Configuration" expanded, showing "Manage P&O and Content" and "Advanced Profile Configuration" (which is selected). Under "Advanced Profile Configuration", there are links for "Search for People...", "Companies", "Inactive Companies", and "Inactive People". The main content area is titled "Administration: Companies". It features a toolbar with icons for search, filter, and other functions. Below the toolbar is a table with columns for "Company" and "Company Type". The table contains several rows: "Electro Ltd USA" (Host), "MyCompany" (Host), "RACERAs.", "Renergy Ltd.", and "Supplier1".

Appendix

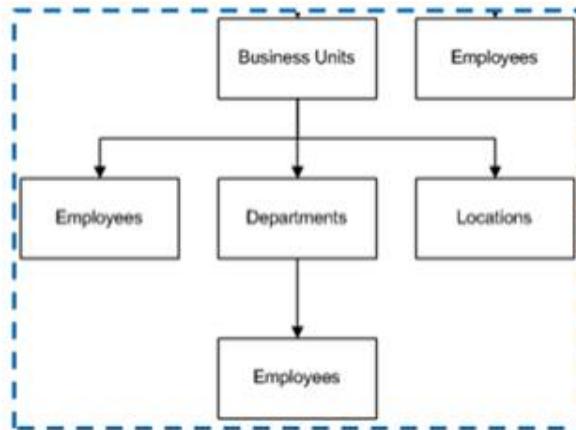
Company Profile Management (2/6)

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**.



The screenshot shows the 3DEXPERIENCE | ENOVIA Collaboration and Approvals interface. At the top, there is a header with a play button icon, the title "3DEXPERIENCE | ENOVIA Collaboration and Approvals", and user information. Below the header, on the left, is a sidebar menu with options: MyCompany, Business Skills, Business Units (which is currently selected), Work Calendars, Capabilities, Collaboration Partners, and Departments. On the right, there is a main content area. At the top of this area, there are fields for "State" (set to "Inactive" with a dropdown arrow and a "Active" button), "Owner" (set to "Corporate"), and "Modified" (set to "Nov 14, 2016 11:40:34 AM"). Below these fields is a toolbar with various icons. The main content area is a table titled "Business Units" with columns for "Name" and "Type". The table contains four rows:

Name	Type
Admin	Business Unit
Body	Business Unit
Chassis	Business Unit
CRM	Business Unit

Appendix

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**.

The screenshot shows the 3DEXPERIENCE | ENOVIA Collaboration and Approvals interface. At the top, there is a navigation bar with a play button icon and the text "3DEXPERIENCE | ENOVIA Collaboration and Approvals". Below the navigation bar, there is a sidebar on the left containing links: "Drop Images here", "MyCompany" (selected), "Company", "Business Skills", "Business Units", "Work Calendars", "Capabilities", "Collaboration Partners", "Departments" (selected), and "Formats". On the right, there is a main content area. At the top of this area, there are fields for "State" (set to "Inactive"), "Owner" (set to "Corporate"), and "Modified" (set to "Nov 14, 2016 11:40:34 AM"). Below these fields is a toolbar with icons for search, add, edit, delete, and filter. The main content area is a table with columns for "Name" and "Type". The table contains three rows: "Administration" (Department), "Finance" (Department), and "Maintenance" (Department). The "Name" column is sorted by name.

Name	Type
Administration	Department
Finance	Department
Maintenance	Department

Appendix

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**.

The screenshot shows a software interface titled "3DEXPERIENCE | ENOVIA Collaboration and Approvals". At the top left is a logo with three circles and the letters "DS". To the right of the title bar are buttons for "State" (set to "Inactive"), "Owner" (set to "Corporate"), and "Modified" (set to "Nov 14, 2016 11:40:34 AM"). Below the title bar is a toolbar with icons for search, delete, add, calendar, filter, and other functions. On the left side, there is a vertical navigation menu with items: MyCompany, Business Skills, Business Units, Work Calendars, Capabilities, Collaboration Partners, Departments, Formats, Location (which is highlighted in blue), and Plants. The main content area displays a table of locations. The table has columns for "Name", "Type", and "City". Three rows are listed:

Name	Type	City
Cost Center	Billing Address	Frankfurt
Research And Development	Headquarters Site	Ruhr
Sales And Marketing	Shipping Address	Tokyo

Appendix

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**.

The screenshot shows a software interface titled "3DEXPERIENCE | ENOVIA Collaboration and Approvals". At the top, there is a navigation bar with a logo, user information (MyCompany, State: Active, Owner: Corporate, Modified: Nov 14, 2016 11:40:34 AM), and various icons for file operations like Resource Loadin, Print, and Save. On the left, a sidebar lists categories: MyCompany, Business Skills, Business Units, Work Calendars, Capabilities, Collaboration Partners, Departments, Formats, Location, Plants, **People**, Regions, and Subsidiaries. The main area displays a table of people with columns: Name, Employee, Email, and State. The data is as follows:

Name	Employee	Email	State
3DIndexAdminUser	Yes		Active
Alice-AGAR	Yes	Alice-AGAR...	Active
Alice-BAILEY	Yes	Alice-BAILE...	Active
Alice-BOUCHER	Yes	Alice-BOUC...	Active
Alice-CLARKE	Yes	Alice-CLAR...	Active
Alice-COWAN	Yes	Alice-COWA...	Active
Alice-FINCH	Yes	Alice-FINCH...	Active
Alice-HARRIS	Yes	Alice-HARRI...	Active
Alice-HODGE	Yes	Alice-HODG...	Active

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.

The screenshot shows a list of products and their assigned licenses:

Name	Assigned License
PAU	✓
PDA - Product Architect	✓
PDE - Product Engineer	✓
PDM - Product Manager	✓

The screenshot shows the 'Companies' section of the interface:

- Manage P&O and Content
- Search for People...
- Companies
- Inactive Companies
- Inactive People
- Collaboration Requests
- Potential Suppliers
- Assign Licensing by Product...** (highlighted with a blue arrow)
- Check Collaboration Mappings with IP
- Work In Progress...

The 'Companies' list includes:

- Electro Ltd USA.
- MyCompany
- RACERAs.
- Renergy Ltd.
- Supplier1

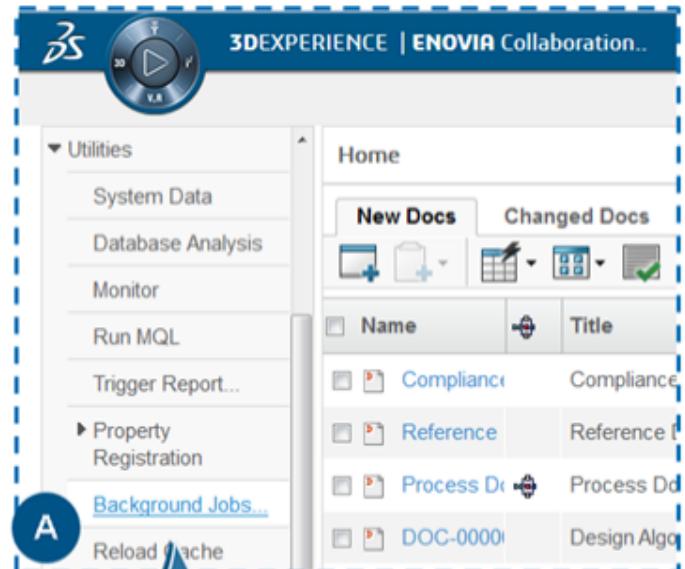
Appendix

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....

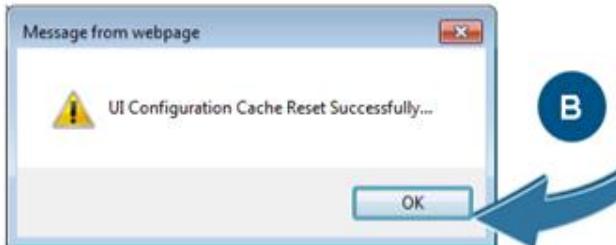


Background Jobs Filter:Current						
Name	Title	Message	Start Date	Progress Percent	Completion	Actions
					No Objects Found	

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:

- In the My Desk menu, select **Collaboration and Approvals > Utilities > Run MQL.**
- Enter the query in the MQL Command box.
- Click **Run**

