

REVIEW AND APPROVE

OBJECTIVE

Review and Approve provides a wide range of capabilities for global enterprise collaboration including managing and organizing shared documents and structured product data in virtual digital workspaces. Users can easily raise issues, organize meetings and track decisions while any object modifications can be formally approved with simple workflow routes

OVERVIEW

Review and Approve provides a virtual collaborative environment that allows global teams to engage securely in all the activities associated with a traditional office environment. Users in digital workspaces can maintain and share content for improved decision-making and issue management. Automatic notifications help team members monitor milestones associated with product lifecycle management and acquiring approvals. Discussion threads enhance collaboration by maintaining an accurate record of the conversations. Budgets are handled with more fiscal responsibility because users see all the currency and unit of measure values in their local or preferred denominations.

Review and Approve also allows users to create and access **3DEXPERIENCE**® data from the most popular Microsoft applications: Word®, Excel®, PowerPoint®, Outlook®, Windows Explorer, Windows Desktop Search, and Office 365. This capability enables enterprise-level collaboration while not disrupting the established productivity of end-users. Document templates provide users with the opportunity to promote company standards. Important information is available always through saved email threads. With product content being managed in **3DEXPERIENCE** platform rather than on users' PCs, organizations now are able to create, manage and review product content more securely.

HIGHLIGHTS

Key features and capabilities include:

Global Collaboration

Assemble Virtual Teams

Users can create a collaborative digital workspace for global team members. A workspace can be used by geographically distributed team members who offer expertise from various disciplines such as design, engineering, manufacturing, procurement and finance. Within the secure workspace, members can create folders; organize, view, review, mark-up and approve documents and other product data, subscribe to event notifications, and schedule meetings.

Manage Documents and Content

Users can manage and organize shared documents and structured product data—such as parts and requests for quote (RFQs)—in multi-level folder and sub-folder structures. Users can also revise and check-in/check-out documents and review history and comments.

Issue Management

In order to facilitate change and formally raise and track product gaps and concerns, issues can be identified against any ENOVIA® object. Users can raise an issue for analysis and resolution. Issues are classified in order for an “issue manager” to be assigned to manage its lifecycle and determine its validity and resolution. Note that the issue management capabilities of **Review and Approve** are often used to initiate the formal change process offered with **Product Engineer**.

Manage Lifecycle and Approvals

Each ENOVIA business object goes through a lifecycle that captures the steps (or states) of its creation, review, release, and/o obsolescence. A single object type can have multiple lifecycles depending on the business need. In order to go from one state of a lifecycle to another, electronic signature approvals are needed often. Signatures are either part of the lifecycle definition or supplemented by end-users as part of defining the approval process for a given object. Dynamic signatures defined by end-users are done using routes. A route contains several steps of approval that must occur. Each step can contain one or more signatures for specific individuals or users. The route must be completed before the business object is promoted to its next lifecycle state. To simplify the approval process and facilitate a repeatable approval process, standard route templates can be leveraged also.

Conversion of Currency and Unit of Measure

Currency or unit of measure values may be displayed as entered, or converted to the preferred format automatically. This allows a user to see all values in their local or other preferred denomination. In addition, multiple currency exchange rate conversions may be defined for an organization, each with a different effective date for the conversion. This allows a company to provide accurate exchange rate conversions for different times of the year as the exchange rate fluctuates.

Secure Access

The software allows workspace leads to set a default access for each member in the workplace and folder structures. This access controls the user's visibility for the workspace, the folder hierarchy and the content managed within the folders.

Meetings

With online meeting management support, users are able to track decisions being made during the product development cycle and take control of every meeting from beginning to end. Capabilities exist to plan, announce, manage and track the results of all meetings. Meeting participants and non-participants are able to access up-to-date meeting information, actions and deliverables at any time. Meetings can be tracked against any ENOVIA object.

Decisions

Users can keep track of and record the decision-making process to stay informed of pertinent product decisions that have been made. Decisions can be associated with meetings as well as any other ENOVIA object.

Automatic Notifications

The product enables users to use subscriptions for proactive notification when product data changes of interest occur. Users can either subscribe to any data element or administrators can subscribe to them with "pushed" subscriptions automatically.

Create Discussion Threads

Users stay up-to-date with the latest information by monitoring discussion threads of interest. Users have the ability to subscribe to individual threaded discussions along with monitoring actively discussed topics throughout the system. Appending a reply to a discussion is easy by responding to an email message received as a subscription.

User Interface PDF Rendering

The ENOVIA user interface can be rendered to PDF without requiring additional 3rd-party software. This allows users to share data in a standard, read-only format with non-ENOVIA users and/or satisfy archiving needs.

Profile Management

Review and Approve provides self-service profile management capabilities so end users with added responsibilities can add new users to the system or modify an existing user's definition. Profile management capabilities include specifying a user's email address, mailing address, physical location which can be used for optional file replication, and assigned roles and organizations. In addition, users are assigned to specific products in order to pass license key checks.

Key Benefits:

- Ensure that different experts can view and take action on critical aspects of product development.
- Prioritize, assign, and track issues that arise as part of normal business processes.
- Foster collaborative use of product development information within virtual teams.
- Ensure the appropriate use of information within carefully managed teams that align with the corporate and project structures.
- Enhance user adoption by simplifying access to product content using the most popular Microsoft applications.
- Apply enterprise-level data sharing and security without disrupting established end-user work procedures.
- Promote reuse with optional use of library classification.

Business Metrics

Review and Approve provides reporting capabilities focused on metrics and statistics to better assess the performance of an organization. These reports are based on ad hoc queries that users can personalize to keep track of the metrics most important to them on a daily basis. All report data can be presented graphically and/or in a table that calculates changes from period to period. In addition, the data can be exported to a spreadsheet for further analysis.

The "Lifecycle Duration" report analyzes the cycle time it takes to complete the development process. Analysis of this information can indicate bottlenecks in the process, which could lead to workflow process changes or new initiatives such as training programs or allocation of additional staff for continuous monitoring or process improvement.

There are several standard reports for measuring current activities, workloads, trends, and throughput. These reports are based upon querying for a given object type indicative of the business process of interest.

Users can easily configure any of the pre-built metrics reports to suit the organization's precise business requirements. The standard reports are generic and can accept user input for establishing the dataset for the report. Business administrators can predefine the reports for execution without user input.

Connector to the Microsoft Desktop

Users can access all files managed with the **3DEXPERIENCE** platform as if they have been saved locally on their PC's hard drive. Business objects are represented as directories and files on the user's PC, which enables easy saving and retrieval of regardless of their format (PDF, MS Office, etc.). It is also possible to store files conveniently using popular Windows functions such as "drag and drop". Through the Microsoft Office tools (Word®, Excel®, PowerPoint®, Outlook, Office 365), users can easily save, browse and navigate product content with custom "Open", "Insert", "Save" and "Save As" dialogs to perform PLM actions such as search, document lock/unlock, file check-in/checkout, delete, version, and revise.

Users can find documents stored in the **3DEXPERIENCE** platform using search capability. When files are uploaded into the **3DEXPERIENCE** platform, their properties can be mapped into metadata that describes the corresponding document business object.

Email is used often to reach key decisions regarding product development projects. In order for companies to maintain an authoritative record of all key decisions that can potentially impact company results, individuals can save Microsoft Outlook email message threads and attachments as PLM-managed data for future reference. In addition, users can easily subscribe to document changes from Microsoft Office tools and receive email notifications when they occur.

Meetings are often scheduled in **3DEXPERIENCE** platform for a **3DEXPERIENCE** project *and can be synchronized to the user's Outlook calendar providing a unified view of a user's meetings at one place and avoid rescheduling due to conflicting appointments.

Similarly, **3DEXPERIENCE** tasks* can be synchronized to the user's Outlook Tasks folder and provide a unified view of all the tasks.

(* Note: For Project meetings and tasks, a **Project Team Member** license is required.

Using Microsoft Templates

Organizations can save and access Microsoft Office templates stored in the **3DEXPERIENCE** platform to create new content based on company standards. Each template can define the standard styles, formatting section, formulas, etc. that a new document should follow. In addition, MS Word templates can include tables that are populated with data from the **3DEXPERIENCE** platform dynamically.

Search Classified Data

If **Classification Manager** has been implemented to establish classification libraries, **Review and Approve** also provides powerful taxonomy-based search and reuse capabilities. Advanced search options are provided across an entire library and its classification attributes. The search can be constrained to classes within a chosen branch of the library hierarchy, or criteria attributes may also be limited to a user-selected branch.

In addition, searches can be made with different units of measure, automatically comparing the specified search criteria against the database, regardless of how the parameters were captured originally. An advanced comparison tool analyzes search results further to identify differences for ranking alternatives. The simplicity of the search tools encourage end-users to always look for the best available content, instead of settling for the first adequate content encountered.

Users work with libraries that have been defined with classification taxonomies unique to their role. The same content may exist in more than one library, but users can browse and search within the role-specific taxonomy of just one library. This capability enables each role to find data easily from within the context of their domain expertise. Only specified users can view and navigate the libraries, the library structures, and the content.

With **Classification Manager**, limited access is granted to allow users to navigate the data, but not download the classified content or IP. However, users can request download access from the librarian for the given IP, which may be granted on a temporary basis with a time limitation for downloads.

Reuse Classified Data

With **Classification Manager, Review and Approve** also promotes data reuse. Users can classify existing parts or documents created from other ENOVIA roles. In addition, a user can create a new part or document of any type and immediately classify it in the library. When new IP is added to a class, it inherits additional attributes to extend its definition to support the parametric search capability.

Users can subscribe to automatic notifications for key events such as new content added to the library or changes to classified items. Subscriptions are defined for entire libraries or to individual components. Notification comes in the form of automatically generated email and can include attached descriptions and links to the relevant library or components for easy navigation. This means that library members can make decisions based on up-to-the-minute status of issues and updates, rather than static knowledge captured at the time of reuse.

Our **3DEXPERIENCE**® platform powers our brand applications, serving 12 industries, and provides a rich portfolio of industry solution experiences.

Dassault Systèmes, the **3DEXPERIENCE**® Company, provides business and people with virtual universes to imagine sustainable innovations. Its world-leading solutions transform the way products are designed, produced, and supported. Dassault Systèmes' collaborative solutions foster social innovation, expanding possibilities for the virtual world to improve the real world. The group brings value to over 190,000 customers of all sizes in all industries in more than 140 countries. For more information, visit www.3ds.com.

