



# ***SmartDX***

## **ENOVIA SmarTeam<sup>®</sup> integrated data export**

### ***User Guide***

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**BPA Delivery 7 for V5R19 (V5.7)**

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## **Update report**

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# 1 Introduction

This document describes the usage of SmartDX Business Process Accelerator.

From a use case point of view it will explain the usage of each functionality. Depending on the SmartDX customization the description and illustrations can differ from your installation.

## 1.1.1 Related Documentation

- SmartDX – Installation Guide
- SmartDX – Implementation Guide
- ENOVIA SmarTeam® - Editor User Guide
- SmartDX – Installation Guide
- SmartDX – Implementation Guide

## 2 Usage

### 2.1 Gathering the transfer documents

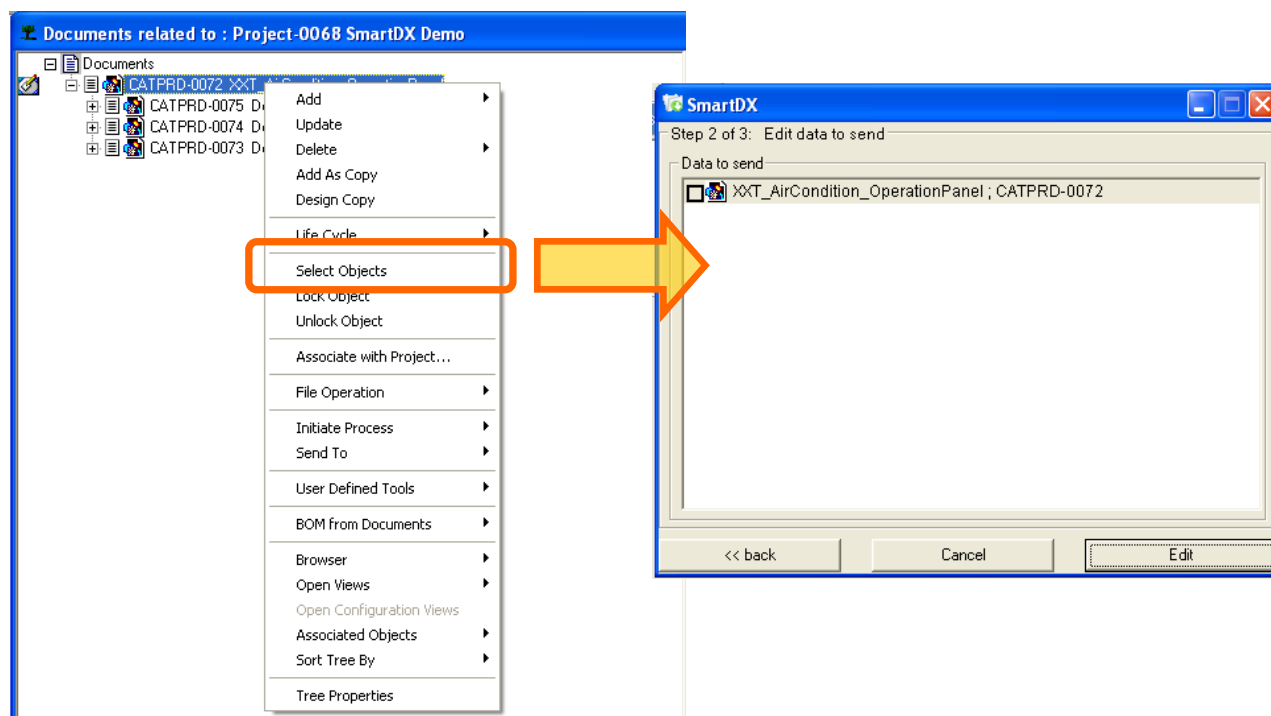
The first step to transfer documents is to gather them within ENOVIA SmarTeam®. SmartDX provides a single respectively multi selection and a so called cross project selection. You can add any document you like to the collection of transmittable documents as long as they comply with the following requirements:

1. file based
2. revision managed
3. checked in or released (in vault)

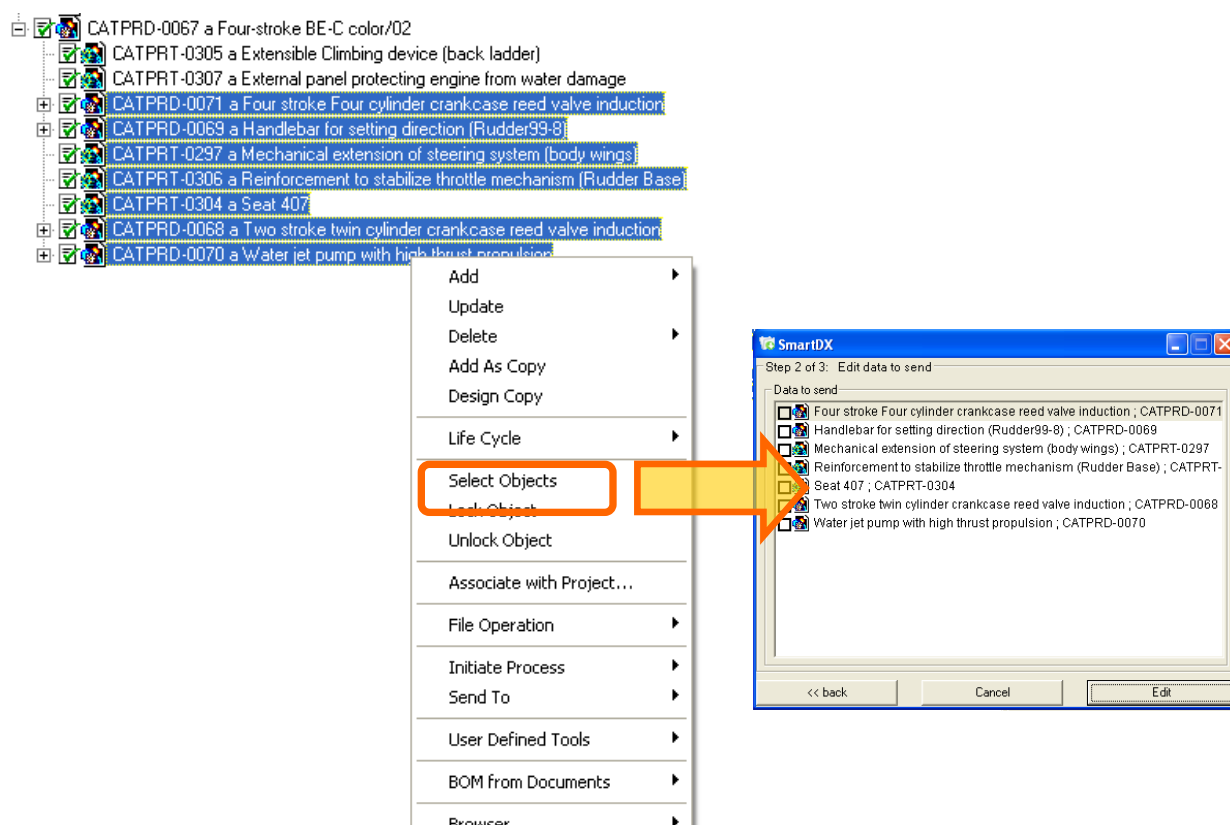
#### Important note

If you want to transmit a CATIA product for example it is not mandatory to select each part of the product structure. During the SmartDX wizard you will be prompted to precise the definition.

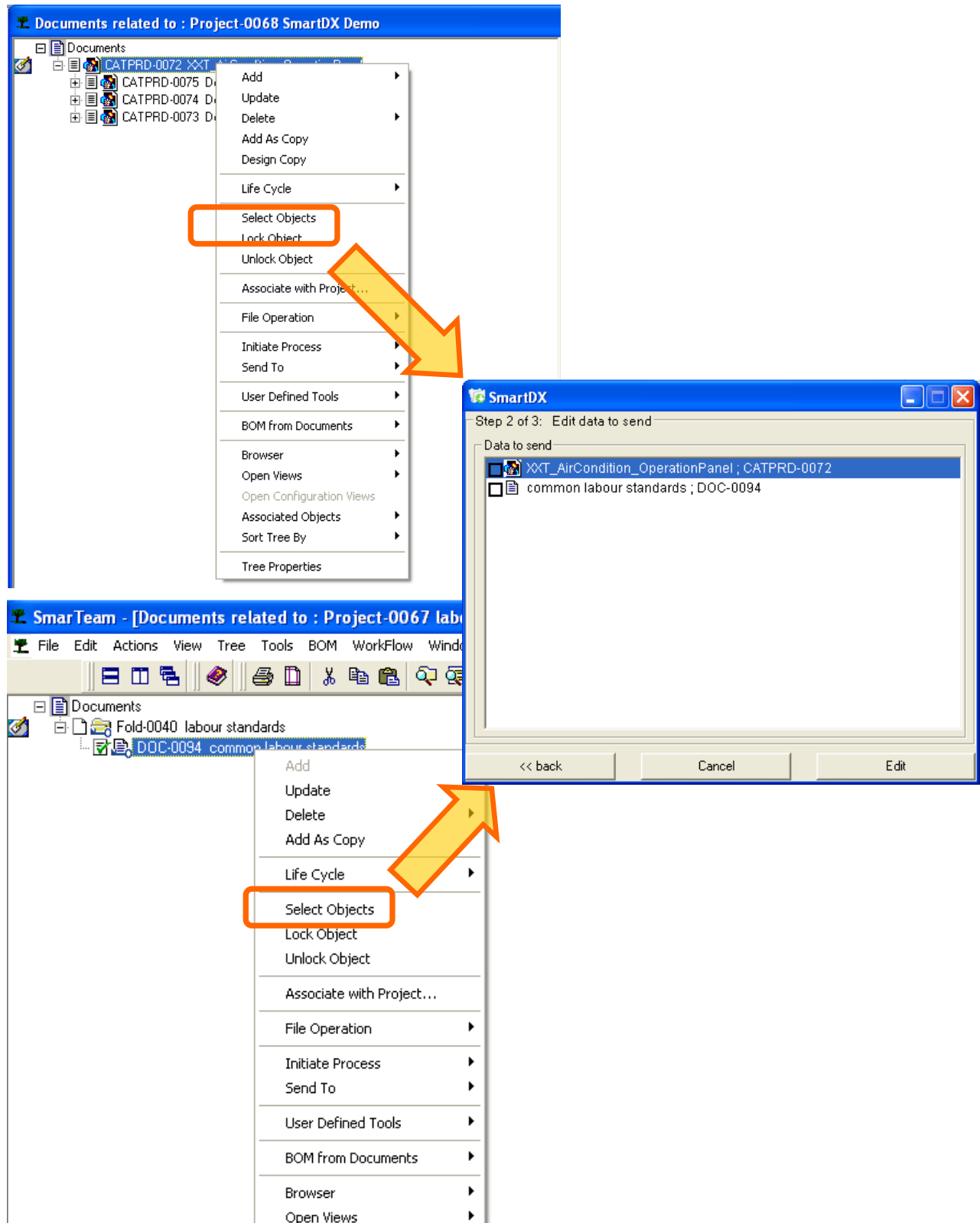
The contextual menu provides the *Select Objects* functionality.



A multi selection can also be used.



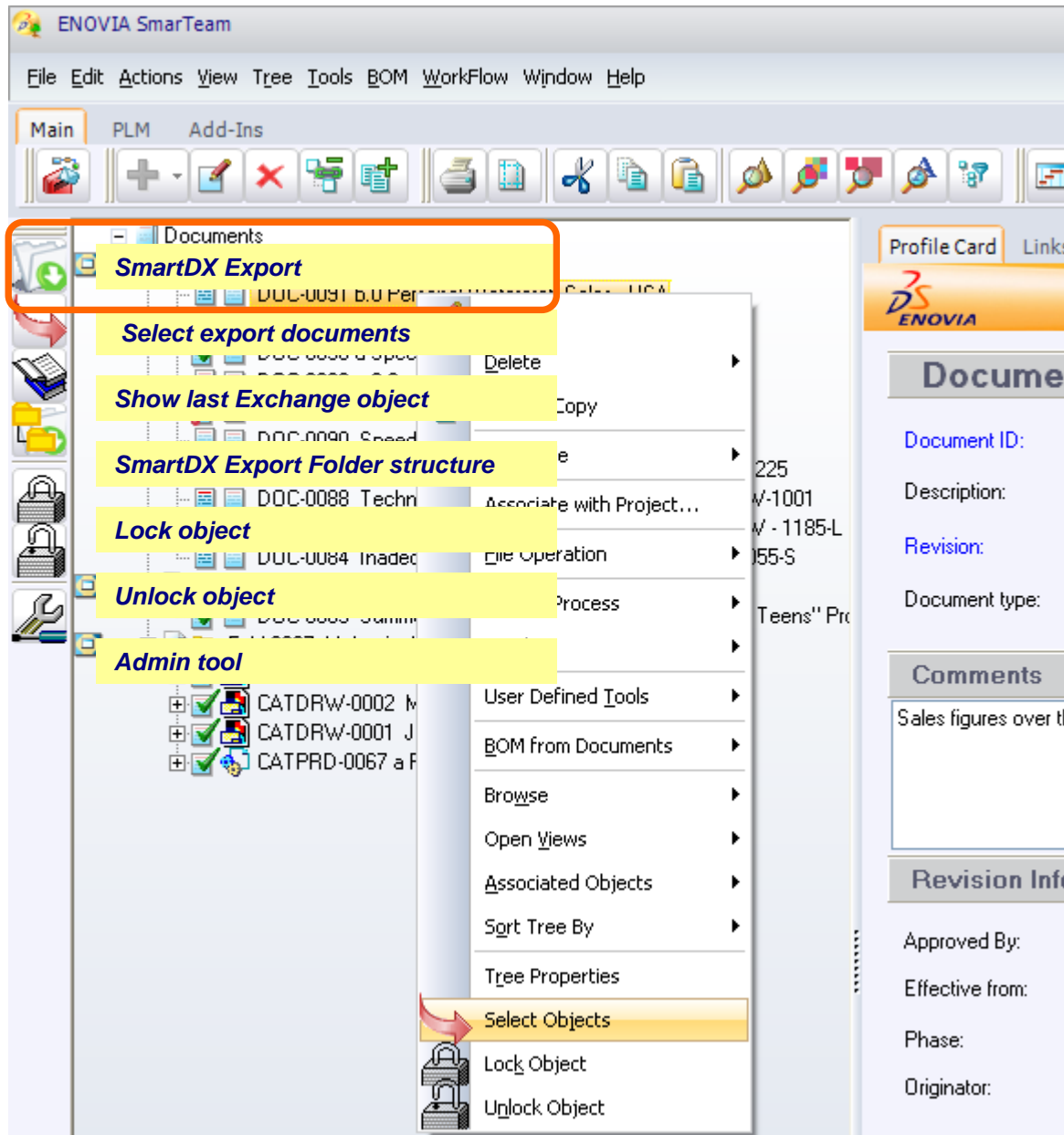
The cross project capability provides the possibility to select documents belonging to different projects





## 2.2 Using the SmartDX wizard

After you selected all the transmittable documents the SmartDX wizard has to be started using the SmartTeam menu bar.



## Notes

If you did not select any document to transfer previously you will receive the following message:

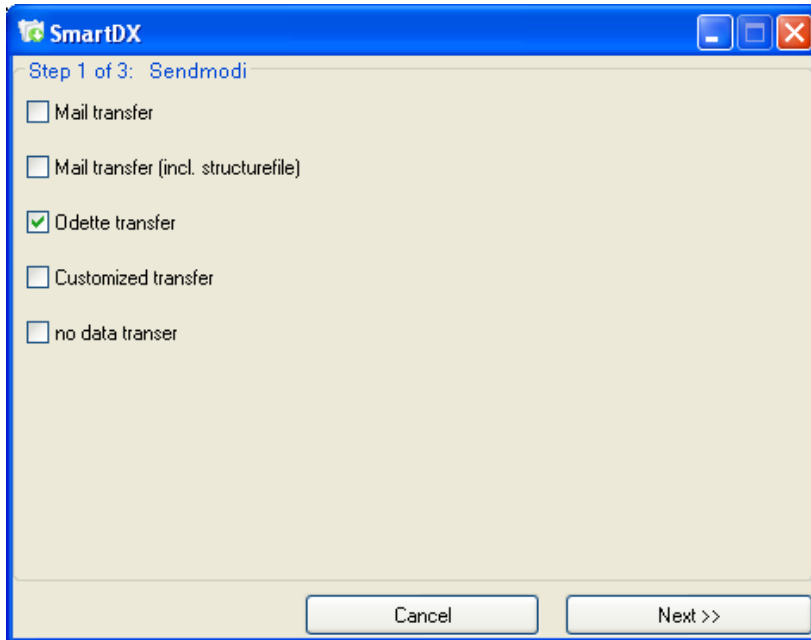


The first window that appears is the welcome screen. Click *next* to continue:



### 2.2.1 Choosing a transfer mode

The next window prompts you to decide for the transfer mode for the current data exchange process. Depending on the customization this can be up to five different transfer modes (please refer to the Implementation Guide for more details to the transfer modes).

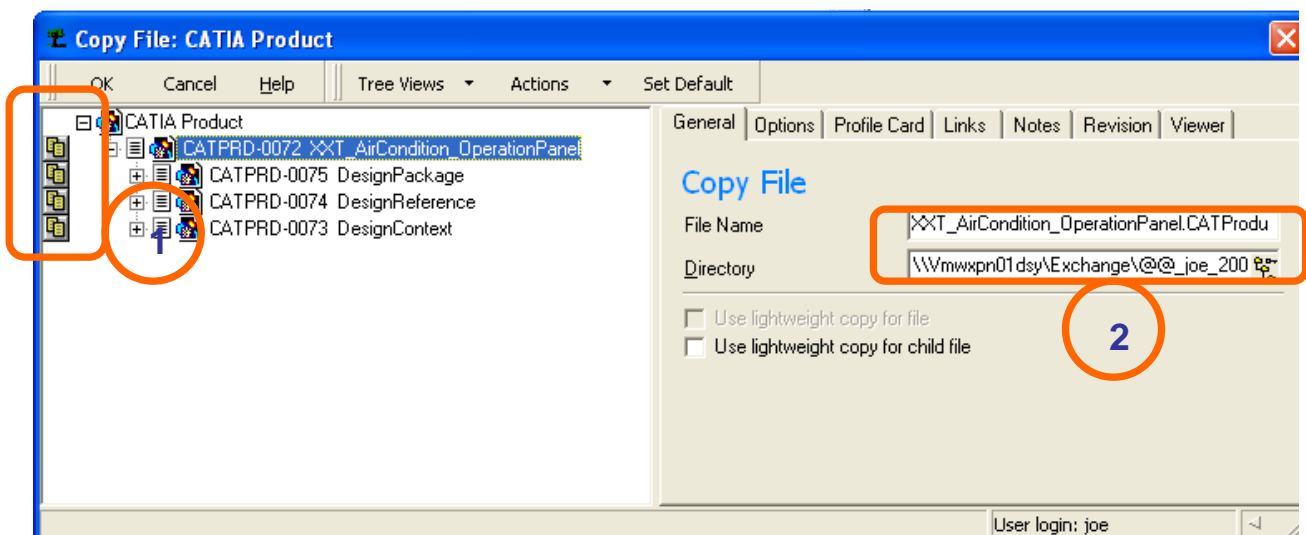
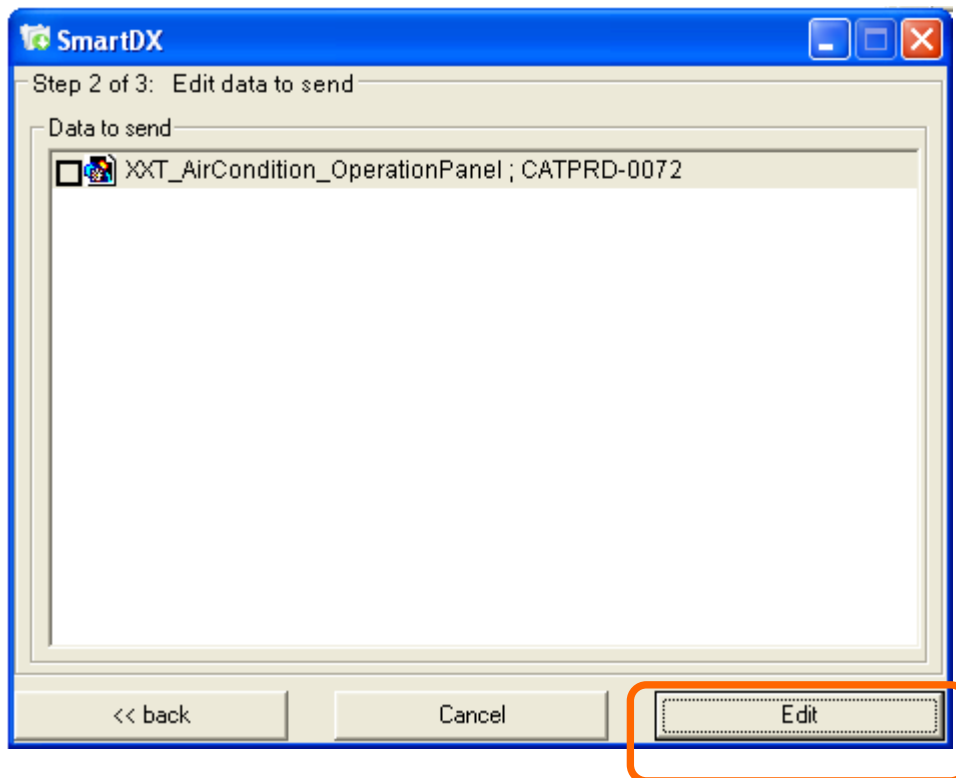


### 2.2.2 Listing of all selected documents

Once you have chosen an appropriate transfer mode, click next to get the list of all selected documents.

Now each document shown in the list has to be defined with respect to the exact transmittable parts and sub products in case of a product. To this effect the default SmartTeam 'copy – File' window will appear to the user after performing the 'Edit' button. This will also copy the transmittable documents from the SmartTeam vault to the exchange directory.

Each document that has been defined that way will be checked in the list. Not before all listed documents have been checked the SmartDX wizard will continue with the next screen.



1

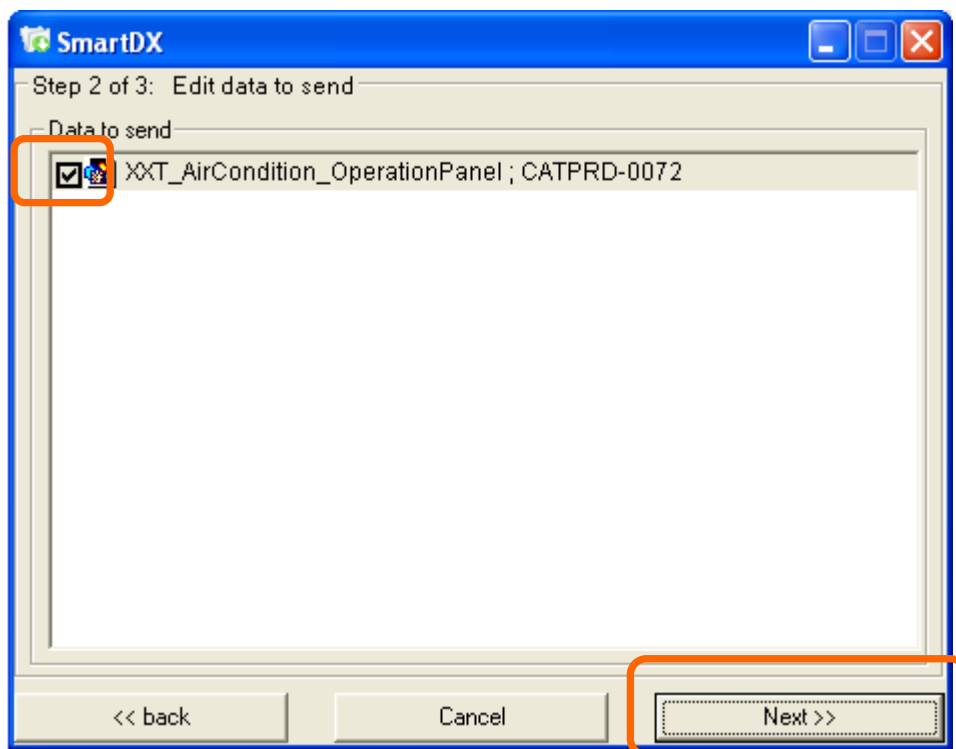
You can either include or exclude parts or sub products from the product structure. The default setting represented by the first column of the tree depends on the life cycle rules settings. If you have a part linked with 3 drawings and each drawing has been made for a different partner you have to ensure only the appropriate customer specific drawing will be delivered to this partner. In this case you will deselect the other 2 drawings.

**2**

The directory points to the predefined root exchange directory extended by a unique named exchange subdirectory.

**Important note**

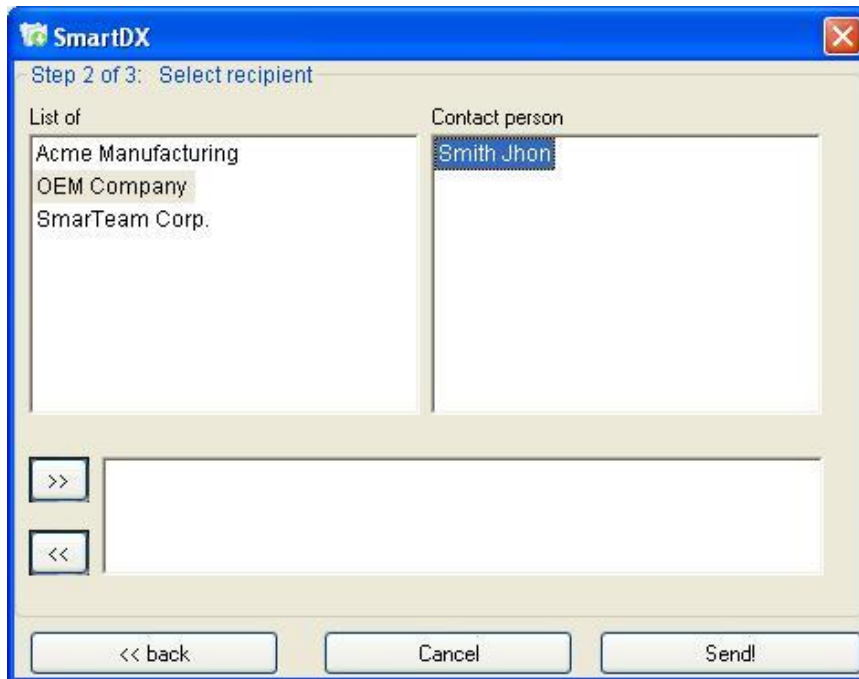
DO NOT CHANGE THE EXCHANGE DIRECTORY. SmartDX server side application will not run proper.



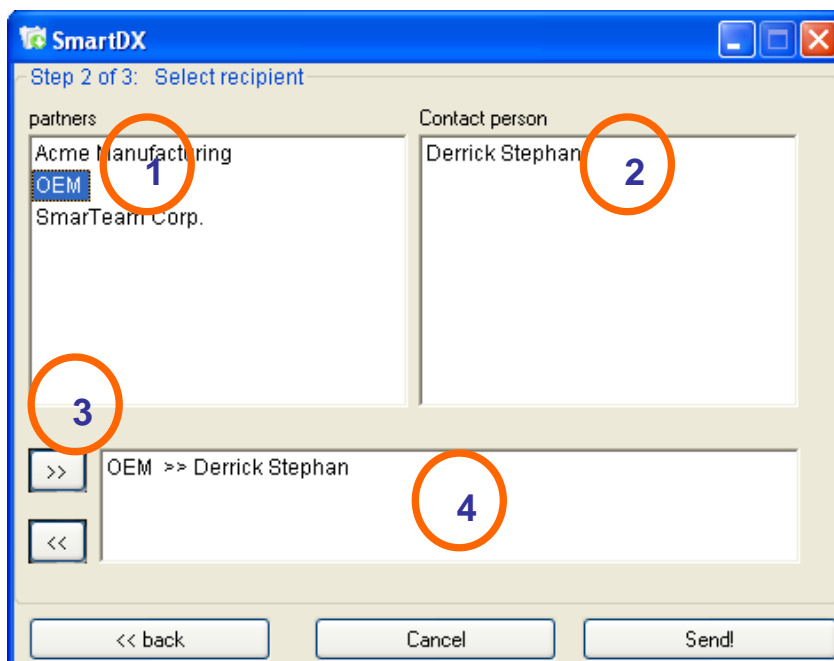
### 2.2.3 Choosing a recipient

In the next step you have to define the recipient of the exchange process. Therefore a list of partners (companies) will appear to you and a list of contact persons depending on the selected partner.

After you have chosen a partner in the left pane all the contact person belonging to the partner will be listed in the right pane.



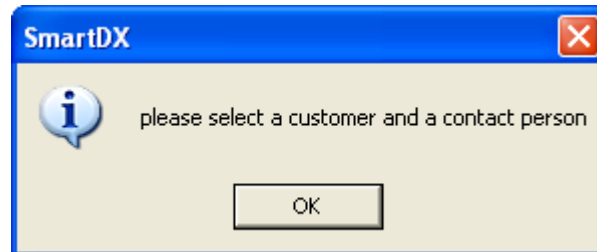
In case the option provided by the SmartDX Admin tool to send the data exchange documents to multiple recipients the 'select recipient' window looks different.



Select the company (1). Next you select the contact person belonging to the company (2). When clicking the '>>' button (3) this will add the company / contact person to the list of recipients (4). Clicking the '<<' button will remove the selected recipient from the list of recipient.

## Notes

If you did not select any company and a contact person you will receive the following message:



After performing the *Send* button SmartDX will end on the client side and will continue the data exchange process on the server side.

## 2.3 Interrupting the SmartDX wizard process

You are able to interrupt the SmartDX wizard at any time. This will lead in a full rollback of the operation you did in the SmartDX wizard. The new created data exchange directory and all the contents will be deleted.

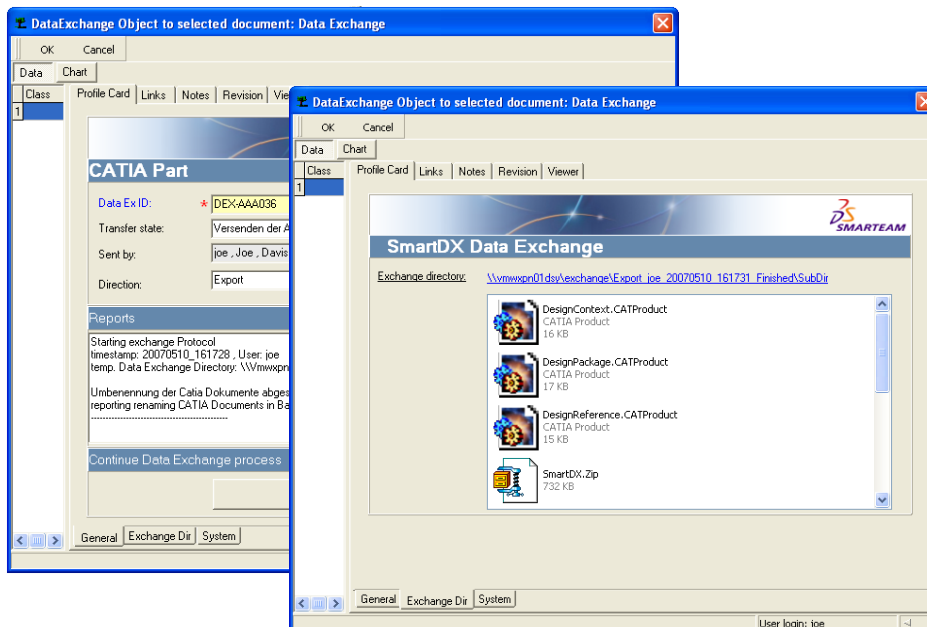


## 3 Additional functionalities

### 3.1 Verifying the Data exchange process

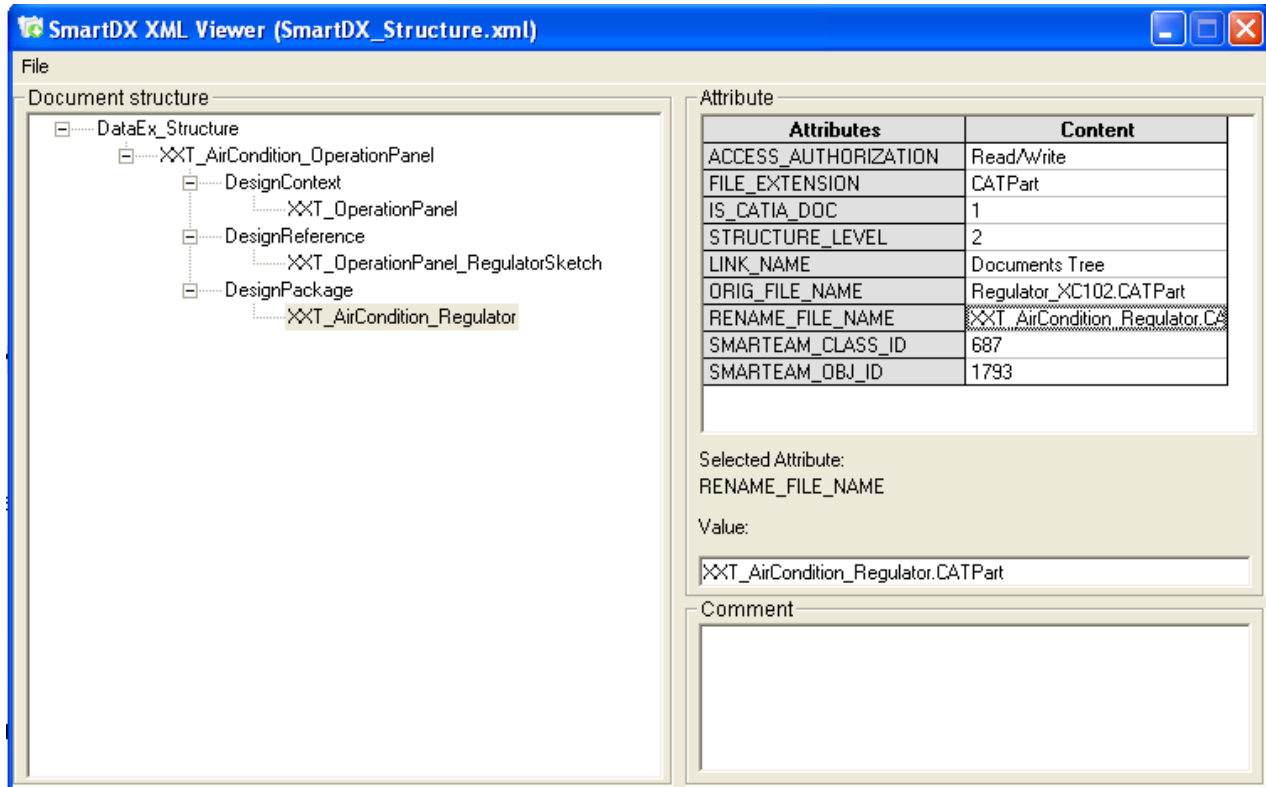
Right after the SmartDX client side process ends and the server side process continue the exchange process or a long time after finishing the data exchange you are able to retrieve either the current status, the detailed data exchange report or the information who sent what to whom at which time in an easy and quick manner.

Using the default SmarTeam search capabilities or the additional function you are able to retrieve the data exchange object, created to each data exchange process. This object is linked to the selected transmittable documents and to the recipient (partner and / or contact person)



### 3.2 SmartDX viewer

Every data exchange process generates a xml based structure file which represents the custom specific meta data information and the hierarchal structure of a product (especially of a CATIA product). To provide a view capability to the user respectively the recipient SmartDX enclosed the SmartDX viewer to the installation routine.



### 3.3 Object locking

Sometimes it is necessary to lock documents / objects companywide to ensure no one is able to work on it. For example you transfer some documents with write permission to the partner to allow him to work on it or you transfer some documents to your customer for approval.

For those cases SmartDX provides the capability to lock these objects as long as it is necessary.

Locked objects can not be checked for modification purposes.

You can also unlock objects as long as you personally locked this objects or you belong to a role that has this privileges.

During the data exchange process using SmartDX wizard you can use this capability when defining the export documents.

