

# SmartProject (SP9)

BPA Delivery 6 for V5R19 (V5.6)

***User's Guide***

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# Introduction

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In order to provide an integrated environment to manage Product Development and Project Execution for engineering department, a solution based on SMARTEAM WEB EDITOR i.e. SmartProject, is provided to all engineers as well as program managers. This tool should enable users to attach deliverables to the on-going projects, to visualize project status and assign tasks.

SmartProject objectives are:

Support the collaborative management of project data across world wide product development teams.

- Combine all product knowledge like tasks, effort, and deliverables in single environment.
- Manage multiple projects within one environment.
- Help other teams to measure what should be done.

Increase product development efficiency.

- Reduce time and cost.
- Improve quality of projects.

Increase the number of successful projects.

The purpose of this document is to help the reader understand how to use the BPA SmartProject.

# 1 Overview of SmartProject

This chapter describes and explains all the functionalities related to SmartProject.

## 1.1 SmartProject Concepts

### 1.1.1 Major Challenges

1. Project and Product are two distinct worlds.
2. Difficulty in managing the entire product knowledge.
3. Need to collaborate on multiple projects information.
4. Need to have reliable information on task progress based on the deliverables.
5. Need to manage project and task lifecycle.

### 1.1.2 Project Major Phases



**Goal:** The goal of this phase is to, based on external requirement, decide if a new project will be executed or not, to cover this requirement.

**Solution:** This is pure SmarTeam standard capabilities: company business process implementation realized with ST Workflow. (For instance: Sales force starts a new process which ends as a CC to the new project manager)



**Goal:** Based on company project templates, define the planning for the new project. Project managers will collaborate with the engineers to identify their availability and perform the assignments.

**Solution:** SmartProject provides specifics tools and user-interfaces to monitor existing projects and define the new schedule.



**Goal:** Project execution itself. The new project is executed until the end of the previously defined schedule.

**Solution:** SmartProject provides tools and user-interfaces to enable project automatic progression update from one task to other, and also to monitor in real time the project completion.



**Goal:** Perform final release and close the project to release the resources.

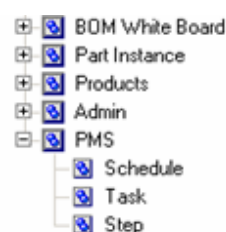
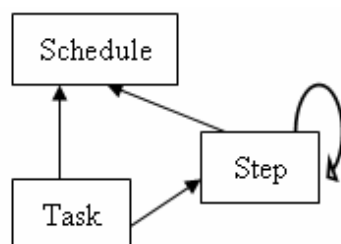
**Solution:** This is SmarTeam standard capabilities: company business process implementation realized with ST Workflow.

### 1.1.3 SmartProject Roles Introduction

1. Project Manager: Project Definition, Resource Management and Project Monitoring.
2. Project Leader: It is specific role just a way to hierarchy assignees.
3. Team Member: Project Definition and Project Execution.

### 1.1.4 SmartProject Architecture

1. SmartProject is using some specific classes to store project schedule information:
  - New Super Class: PMS
  - Subclasses under PMS: Schedule, Task, Step

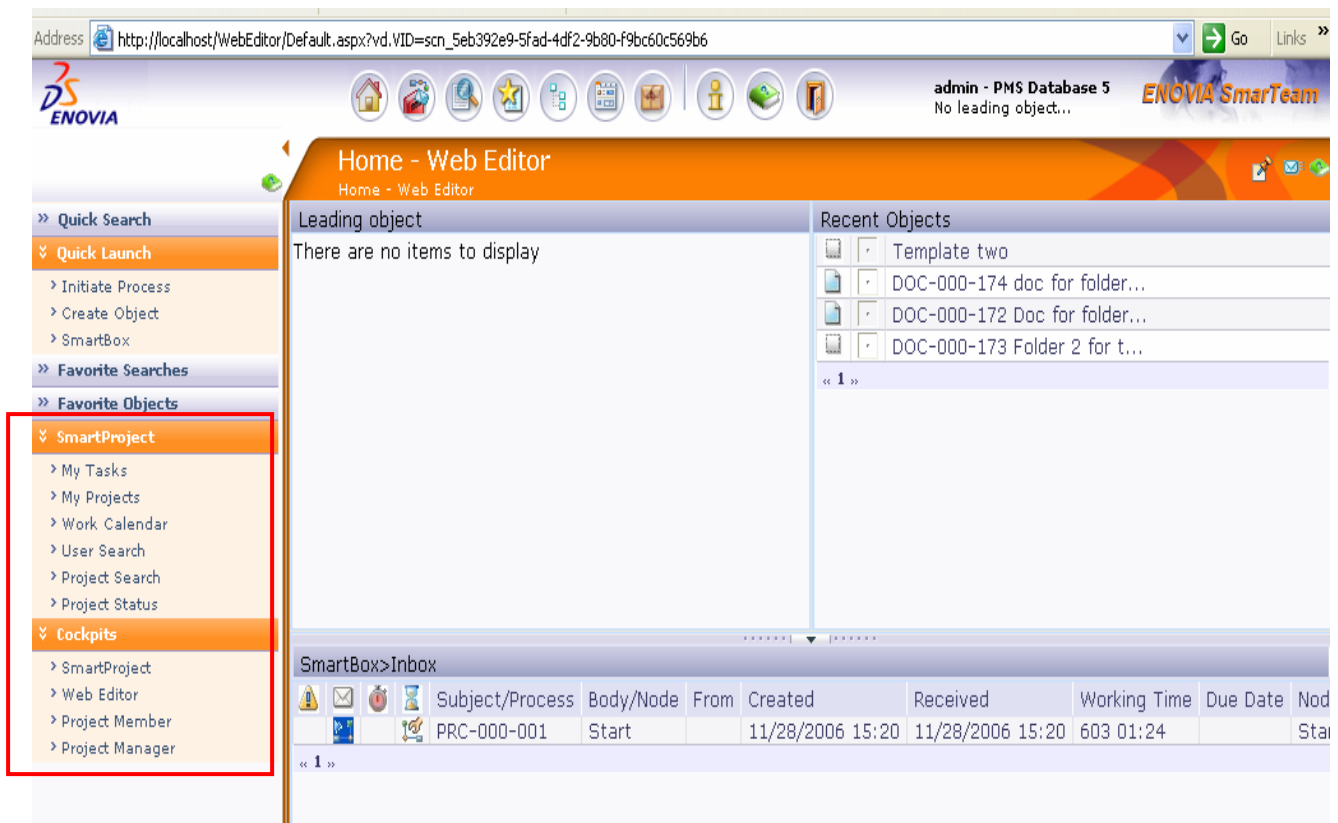


2. In order to manage projects, SmartProject is implementing some specific behaviors:
  - New User Interfaces to input project information.
  - New Cockpits for Project Managers and Members.
  - New Monitoring Tools.
  - MS-Project and Excel Import/Export Tool.
  - Special link behavior between Tasks and their Deliverables.

## 1.2 SmartProject General Features and Configuration

### 1.2.1 System Look and Feel

SmartProject's default look & feel is different from SmarTeam Web Editor's look & feel.



Subject/Process	Body/Node	From	Created	Received	Working Time	Due Date	Nod
PRC-000-001	Start		11/28/2006 15:20	11/28/2006 15:20	603 01:24		Stai

## 1.2.2 SmartProject User Application Bar

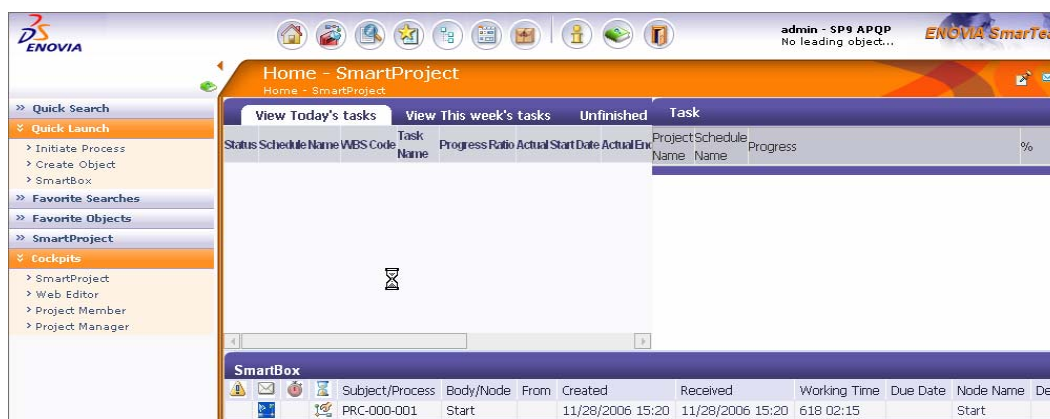
SmartProject User application bar includes the below functions.

1. **My Tasks:** This view shows the list of all the tasks the currently logged in user is assigned to. It is also possible to filter the tasks by project. Assignees are able to check the status of their tasks and also to update them following their progression.
2. **My Projects:** This view shows all the projects the currently logged in user is responsible for. Project Managers are able to review each project status and perform schedule updates etc.
3. **Work Calendar:** This view shows the global calendar for the company. It displays all the working days and days off. Project Manager is able to change the days off setting.
4. **User Search:** This is a search engine useful to retrieve specific users and review their individual workload. This tool is aim to be used by project managers.
5. **Project Search:** This is a search engine to retrieve specific projects. Users are then able to check status of resulting projects and perform updates (Project Managers only).
6. **Project Status:** This view is useful to display in one screen the progression of several projects.

## 1.2.3 SmartProject Cockpit

SmartProject User application bar includes the below functions.

**SmartProject:** This view shows three frames at one time. There is My task frame on left top. My project and Schedule on the right top. IBox frame is at the bottom.





**WebEditor:** This view shows the default (home) screen of SmartProject.

**Project Member:** It is a cockpit for the logged in user.

**Project Member:** It is a cockpit for Project Manager

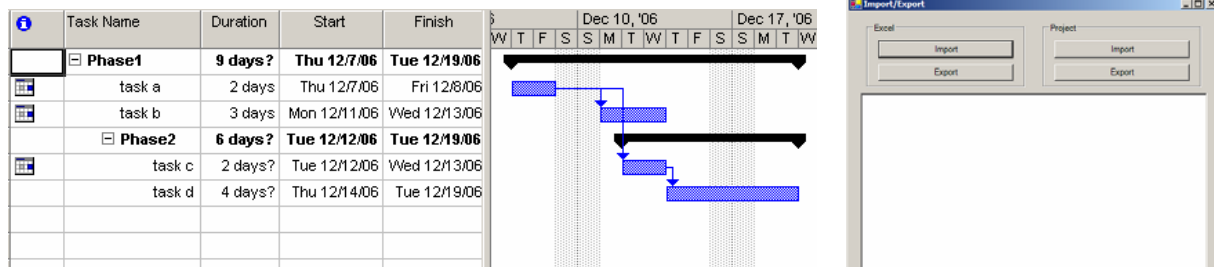
## 1.3 How to Create a New Project

### 1.3.1 Tasks Definition

#### 1. From Scratch:

- Directly with Web Editor: By using SmarTeam Web Editor standard operation, user can add schedule objects (Schedule, Step and Task classes).
- By Using MS Project Import Tool: Define the new WBS with MS-Project.

- Tasks must not be defined at the first level.
- Dependencies are imported in SmartProject.
- Assignee information is imported to SmartProject. If Non-existing users will be created in ST.
- Upon import, a new project named from the filename will be created into SmarTeam.



#### 2. By Reusing an Existing Project:

- Directly with Web Editor.
  - Create a new Project object.
  - Use WBS Copy tool from the project profile card. Also accessible from SmartProject User application bar. From this interface, you can browse the existing projects and select the project you want to copy from.
  - If the user also wants to copy Deliverables Structure along with WBS from the same source Project then Project Copy tool is the best option.



**Project Copy**  
Project>Project Copy

Start Cancel

**Source Project**

Project Group: PRJ-000-002, My Projects

Project: ./ Project1, PRJ-000-019

**Target Project**

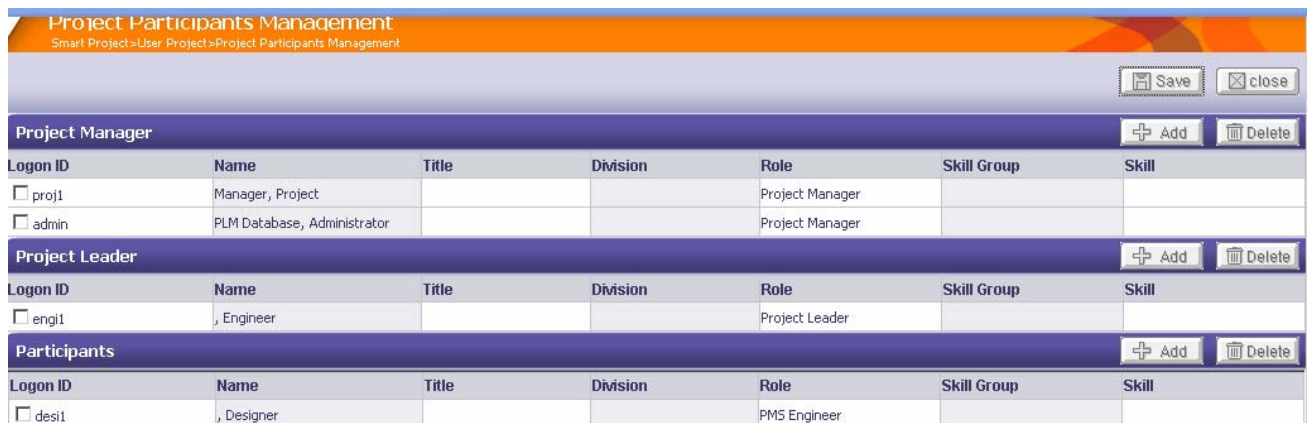
Project ID: PRJ-000-076

Project Name: Project Scenario

- d. By Using MS Project Export/Import Tool.
- Export the project you want to reuse.
  - Modify it with the right tool (Project or Excel).
  - Change its filename into the new project name.
  - Import it into SmarTeam.

### 1.3.2 Project Team Definition

From the project profile card, click on Participant (Also accessible from Smart Project toolbar)



**Project Participants Management**  
Smart Project>User Project>Project Participants Management

Save close

**Project Manager** Add Delete

Logon ID	Name	Title	Division	Role	Skill Group	Skill
<input type="checkbox"/> proj1	Manager, Project			Project Manager		
<input type="checkbox"/> admin	PLM Database, Administrator			Project Manager		

**Project Leader** Add Delete

Logon ID	Name	Title	Division	Role	Skill Group	Skill
<input type="checkbox"/> eng11	, Engineer			Project Leader		

**Participants** Add Delete

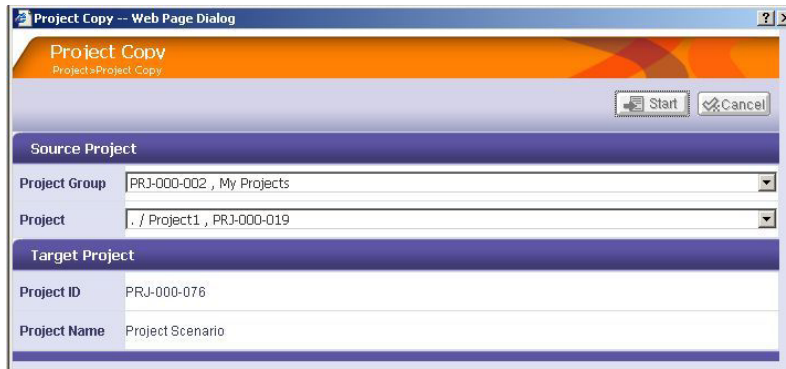
Logon ID	Name	Title	Division	Role	Skill Group	Skill
<input type="checkbox"/> desi1	, Designer			PMS Engineer		

From this interface, you are able to define the Project Manager, the Project Leader and the Team Members for this specific project.

### 1.3.3 Deliverables Structure Creation

A Deliverable is the result of a task. At first it is empty, and at the task completion it carries the result of the task. There are two ways to define the whole document structure for the current project (also including non-task-resulting document).

1. **From scratch:** By using SmartTeam Web Editor standard operations the user can create the relevant folders and documents linked to his/her project.
2. **By Copying an Existing Structure:** From the project profile card, click on Documents Copy (Also accessible from Smart Project toolbar). If the user wants to copy Deliverables Structure and WBS from the same source Project then Project Copy tool is the best option.

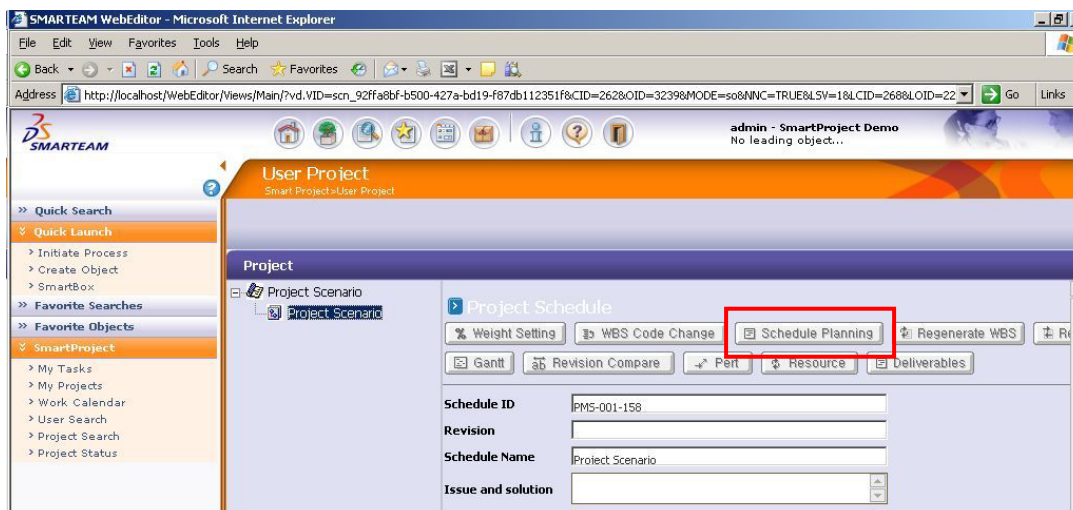


The image shows a 'Project Copy - Web Page Dialog' window. It has a title bar with a question mark and a close button. The main area is divided into two sections: 'Source Project' and 'Target Project'. In the 'Source Project' section, there are two dropdown menus: 'Project Group' with the value 'PRJ-000-002, My Projects' and 'Project' with the value './ Project1, PRJ-000-019'. In the 'Target Project' section, there are two text fields: 'Project ID' with the value 'PRJ-000-076' and 'Project Name' with the value 'Project Scenario'. At the top right of the dialog, there are 'Start' and 'Cancel' buttons.

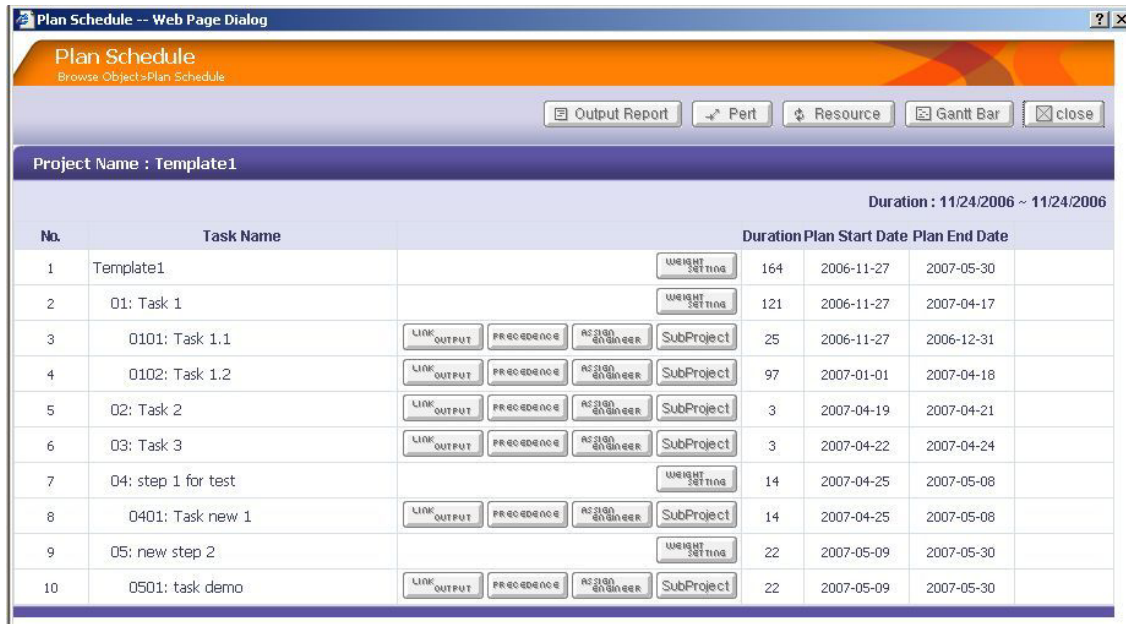
From this interface, it is possible to browse the existing projects and select the project to copy from. Note: Only the meta-data is copied. This is the work of each task assignee to create the physical file which is the result for this task (deliverable).

### 1.3.4 Dependency Definition

1. Open the Schedule Planning view:



The image shows a screenshot of the SMARTTEAM WebEditor interface in a Microsoft Internet Explorer browser. The browser's address bar shows a URL starting with 'http://localhost/SmartTeam/Views/Main/7vd...'. The interface has a top navigation bar with the SMARTTEAM logo and a user profile 'admin - SmartProject Demo'. On the left, there is a sidebar with a 'Quick Search' section and a 'Quick Launch' section containing links like 'Initiate Process', 'Create Object', and 'SmartBox'. The main content area is titled 'User Project' and 'Smart Project > User Project'. It shows a 'Project' section with a tree view containing 'Project Scenario' and 'Project Scenario'. Below this, there is a 'Project Schedule' section with several buttons: 'Weight Setting', 'WBS Code Change', 'Schedule Planning' (highlighted with a red box), 'Regenerate WBS', 'Gantt', 'Revision Compare', 'Perf', 'Resource', and 'Deliverables'. Below the buttons, there are text fields for 'Schedule ID' (value: FMS-001-158), 'Revision', 'Schedule Name' (value: Project Scenario), and 'Issue and solution'.



**Plan Schedule**  
Browse Object>Plan Schedule

Output Report | Pert | Resource | Gantt Bar | close

Project Name : Template1

Duration : 11/24/2006 ~ 11/24/2006

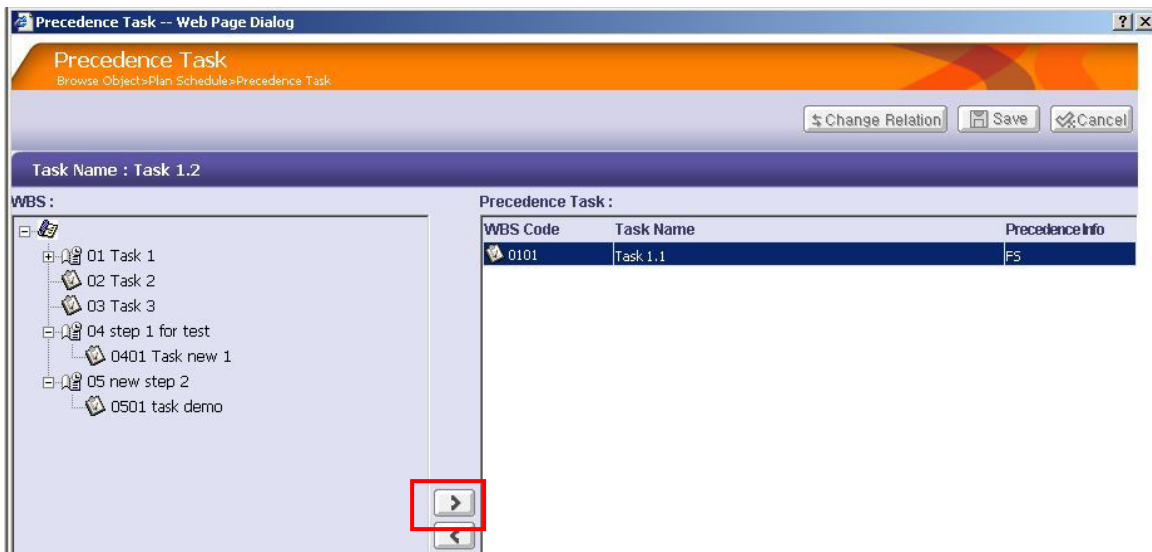
No.	Task Name		Duration	Plan Start Date	Plan End Date
1	Template1	WEIGHT SETTING	164	2006-11-27	2007-05-30
2	01: Task 1	WEIGHT SETTING	121	2006-11-27	2007-04-17
3	0101: Task 1.1	LINK OUTPUT   PRECEDENCE   ASSIGN ENGINEER   SubProject	25	2006-11-27	2006-12-31
4	0102: Task 1.2	LINK OUTPUT   PRECEDENCE   ASSIGN ENGINEER   SubProject	97	2007-01-01	2007-04-18
5	02: Task 2	LINK OUTPUT   PRECEDENCE   ASSIGN ENGINEER   SubProject	3	2007-04-19	2007-04-21
6	03: Task 3	LINK OUTPUT   PRECEDENCE   ASSIGN ENGINEER   SubProject	3	2007-04-22	2007-04-24
7	04: step 1 for test	WEIGHT SETTING	14	2007-04-25	2007-05-08
8	0401: Task new 1	LINK OUTPUT   PRECEDENCE   ASSIGN ENGINEER   SubProject	14	2007-04-25	2007-05-08
9	05: new step 2	WEIGHT SETTING	22	2007-05-09	2007-05-30
10	0501: task demo	LINK OUTPUT   PRECEDENCE   ASSIGN ENGINEER   SubProject	22	2007-05-09	2007-05-30

From this interface, once tasks have been defined, it is possible finalize the WBS:

- Connect Tasks and Deliverables through **Link Output**.
- Assign Engineers to Tasks through **Assign Engineer**.
- Define dependency between tasks through **Precedence**.
- Set the weight of tasks and deliverables through **Weight Setting**.

## 2. Define the Dependency for the relevant Tasks:

Select the task to be updated ("precedence")



**Precedence Task**  
Browse Object>Plan Schedule>Precedence Task

Change Relation | Save | Cancel

Task Name : Task 1.2

WBS :

- 01 Task 1
  - 02 Task 2
  - 03 Task 3
  - 04 step 1 for test
    - 0401 Task new 1
    - 05 new step 2
      - 0501 task demo

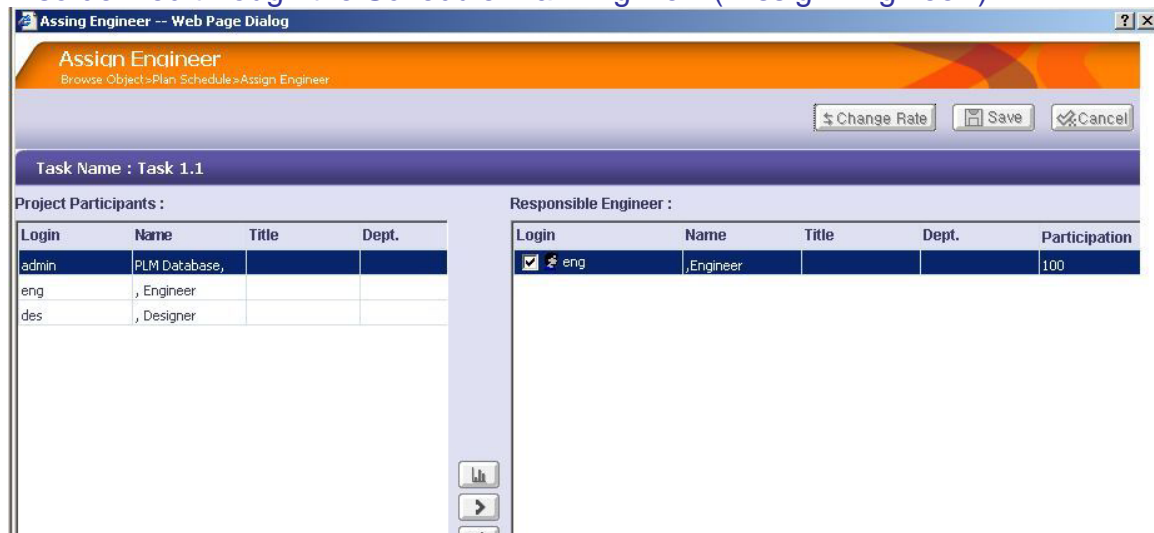
Precedence Task :

WBS Code	Task Name	Precedence Info
0101	Task 1.1	F5

Navigation buttons: [Previous] [Next] [Refresh] [Close]

### 1.3.5 Team Members Assignment

Also defined through the Schedule Planning view ("Assign Engineer")



**Assign Engineer**  
Browse Object>Plan Schedule>Assign Engineer

Change Rate Save Cancel

Task Name : Task 1.1

**Project Participants :**

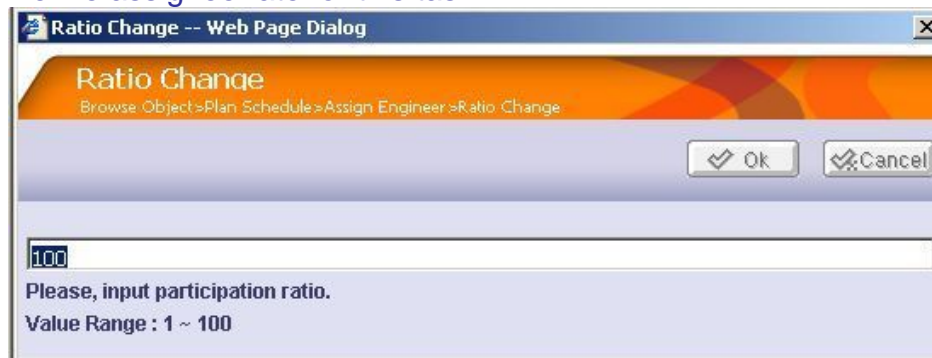
Login	Name	Title	Dept.
admin	PLM Database,		
eng	, Engineer		
des	, Designer		

**Responsible Engineer :**

Login	Name	Title	Dept.	Participation
<input checked="" type="checkbox"/> eng	,Engineer			100

Buttons: [Bar Chart Icon], [Next Arrow], [Previous Arrow]

Define assignee rate for this task.



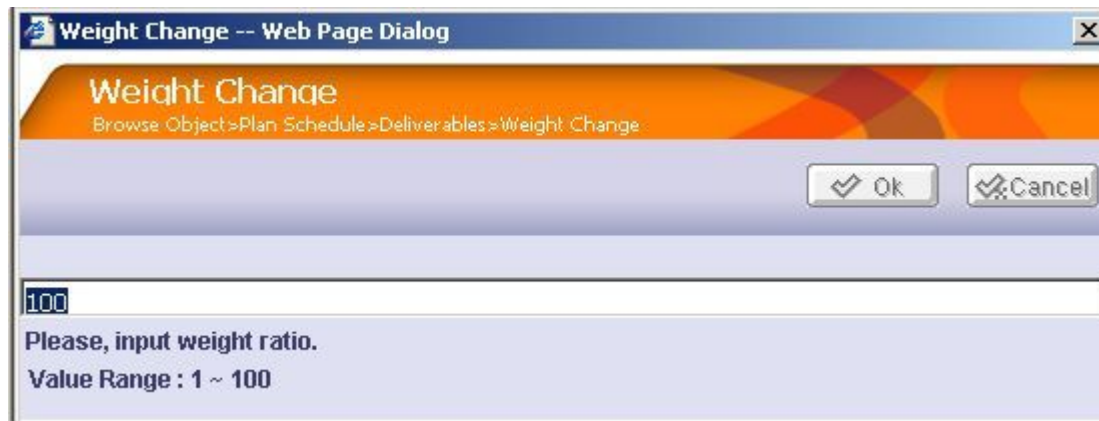
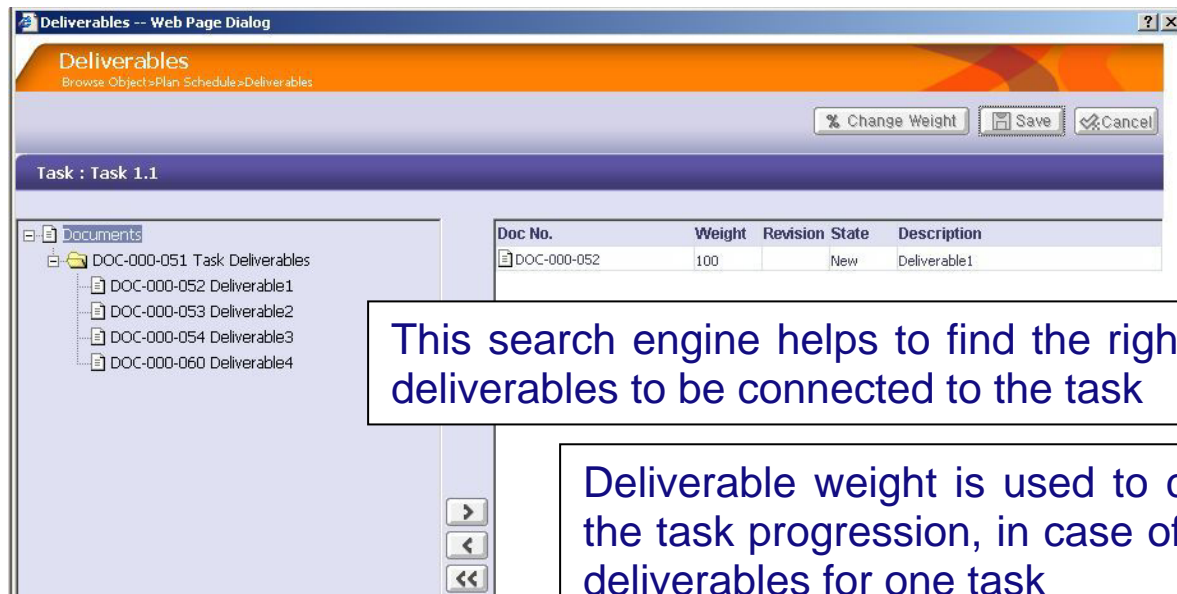
**Ratio Change**  
Browse Object>Plan Schedule>Assign Engineer>Ratio Change

Ok Cancel

Please, input participation ratio.  
Value Range : 1 ~ 100

### 1.3.6 Deliverables Linking

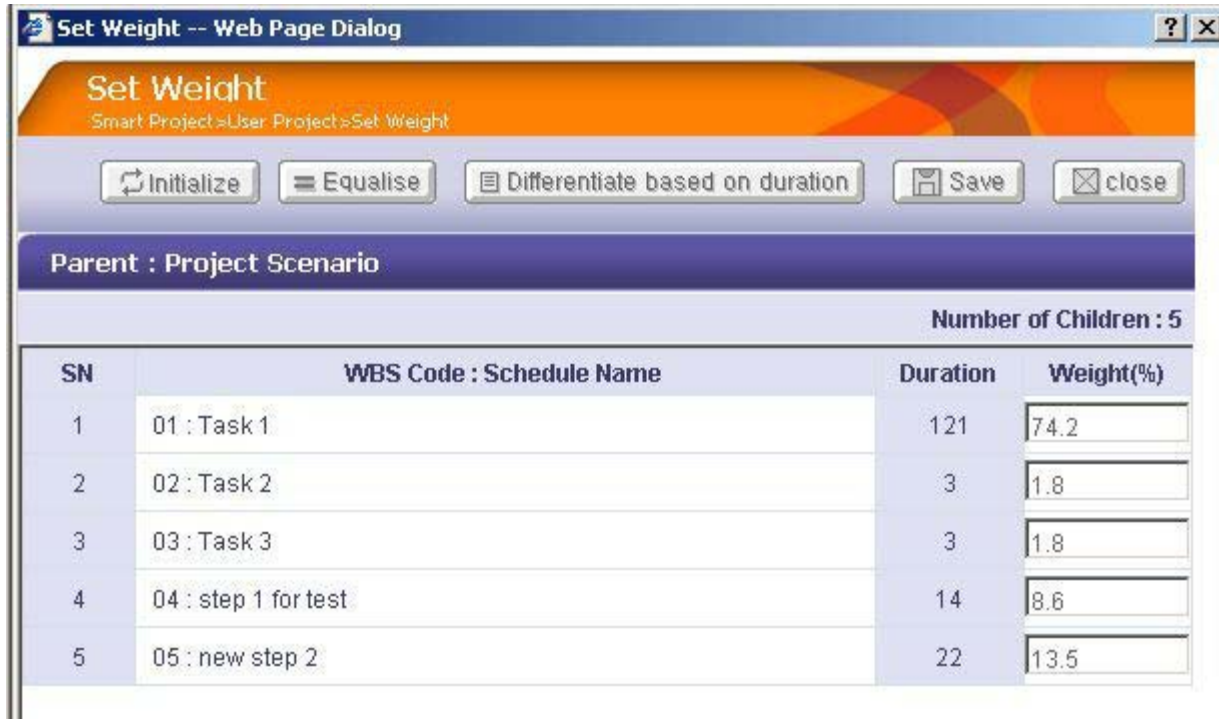
Also defined through the Schedule Planning view ("Link output")



### 1.3.7 Tasks Weight Setting

User must define a weight repartition for all the children at each parent in the WBS. The weights are used to calculate project and phase progression and this can be defined through the Schedule Planning view ("Weight Setting").





SN	WBS Code : Schedule Name	Duration	Weight(%)
1	01 : Task 1	121	74.2
2	02 : Task 2	3	1.8
3	03 : Task 3	3	1.8
4	04 : step 1 for test	14	8.6
5	05 : new step 2	22	13.5

Finally you must define the weights for the top phases

After the completion of above these 7 steps, the project schedule is completely defined.

The next operation depends on customer business processes

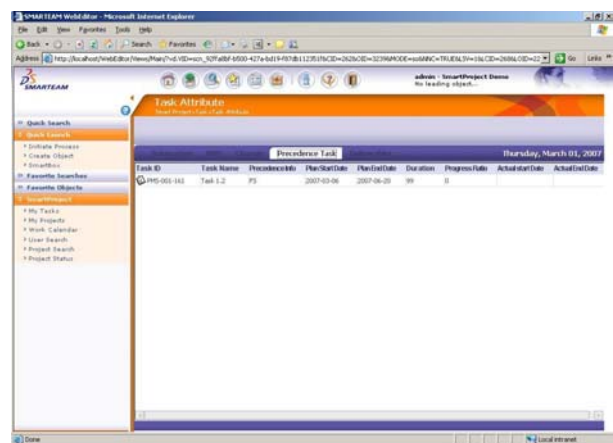
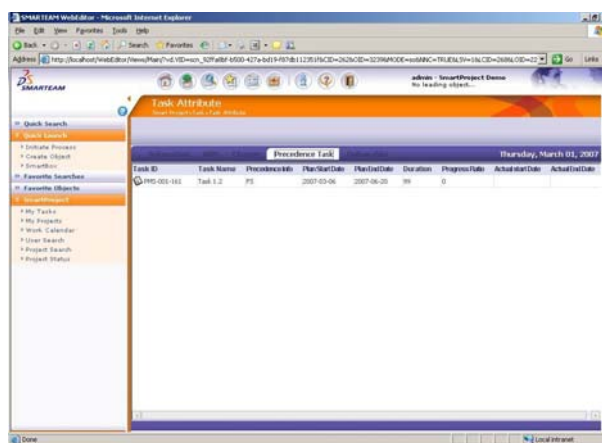
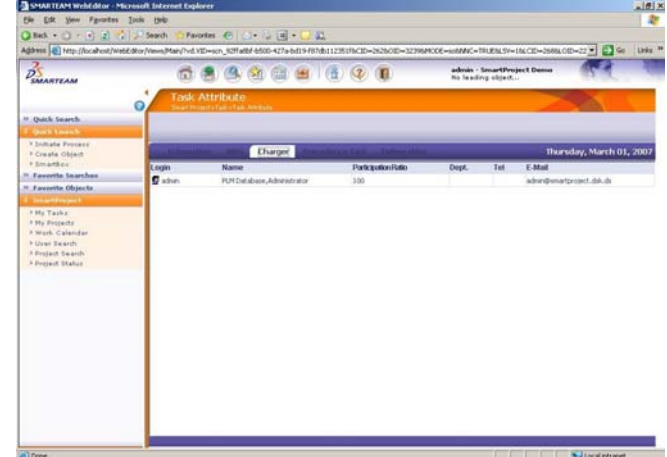
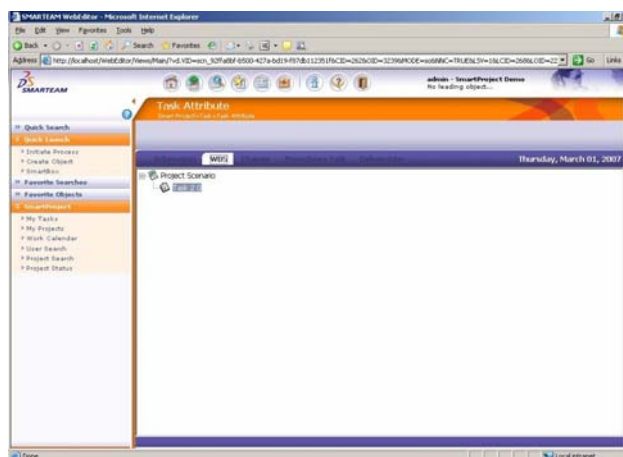
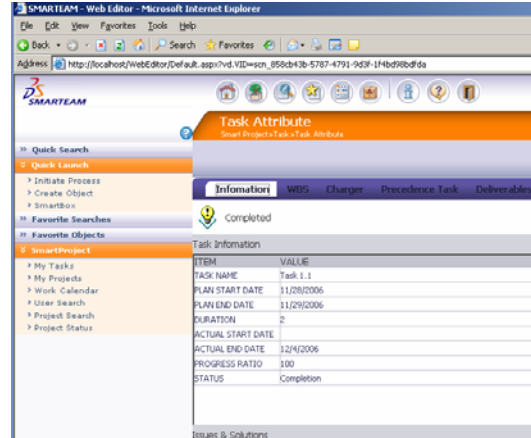
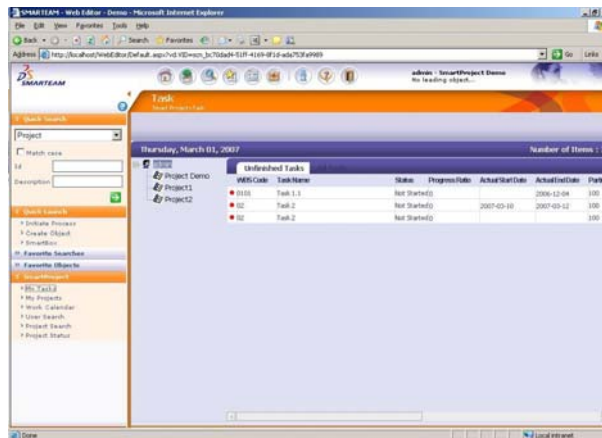
- Notify the assignees with the new schedule.
- Initiate a process inside SmarTeam to ask the assignees to check the new schedule fits their individual workload.

## 1.4 Project Execution

### 1.4.1 Team Member Operations

1. During the project life, Team Members are usually interacting with the system at two specific times.

- During the Project Definition, to approve the execution schedule proposed by their project managers.
- During the Project Execution, to update the system while they are executing their tasks.



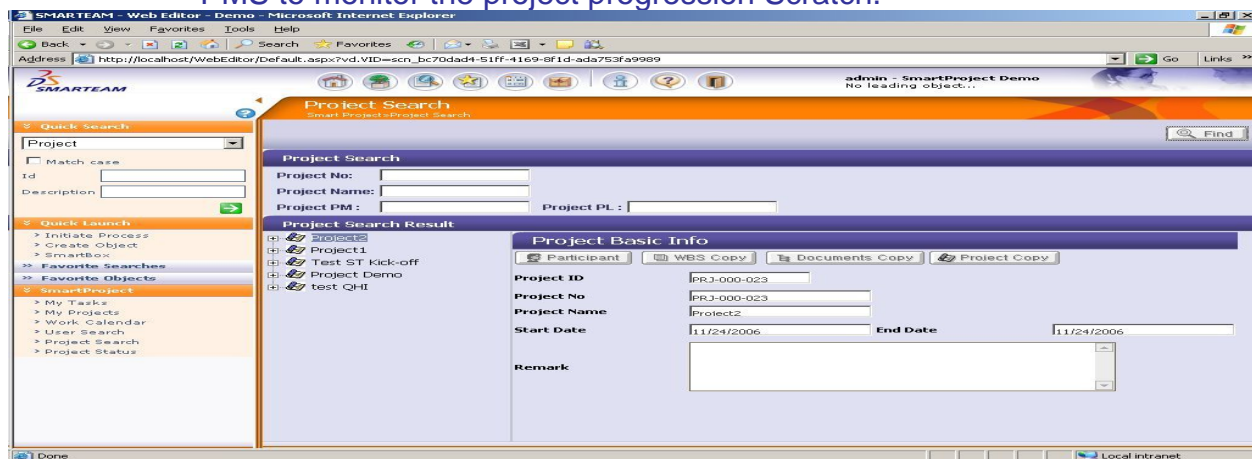
## 2. Task Execution:



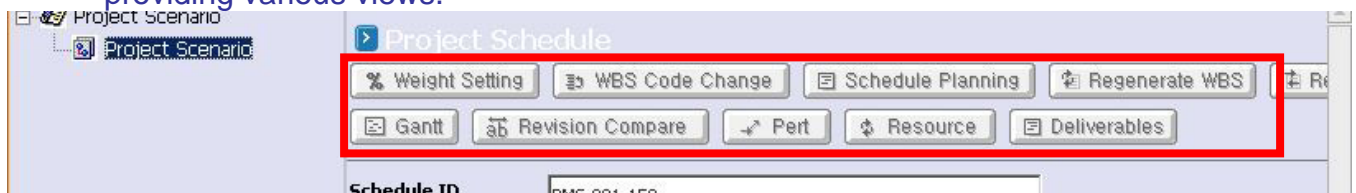
- a. Tasks with deliverables are updated automatically upon release of the linked documents.
  - Select the task to be performed.
  - Input the start date and save.
  - Double-click to retrieve the deliverable.
  - Perform the task and release.
  - Upon release, the task progression is updated to 100%.
- b. Tasks with no deliverable linked to it must be updated manually by Team Member.
  - The operations needed to perform the task are similar to the previous case but this time, the assignee must manually input Progression and End Date.

## 1.4.2 Project Manager Operations

1. During the project, Project Managers are usually interacting with the system at two different times.
  - a. During the Project Definition, they define the schedule, propose it to the team members and release it.
  - b. During the Project Execution, they can use the different tools provided by PMS to monitor the project progression Scratch.



2. In order to help Project Managers managing their projects efficiently, SmartProject is providing various views.



- a. Project Status Window.

- >> Quick Search
- >> Quick Launch
  - > Initiate Process
  - > Create Object
  - > SmartBox
- >> Favorite Searches
- >> Favorite Objects
- >> SmartProject
  - > My Tasks
  - > My Projects
  - > Work Calendar
  - > User Search
  - > Project Search
  - > Project Status

**Project Search**  
 Smart Project » Project Search

**Project Search**

Project No:

Project Name:

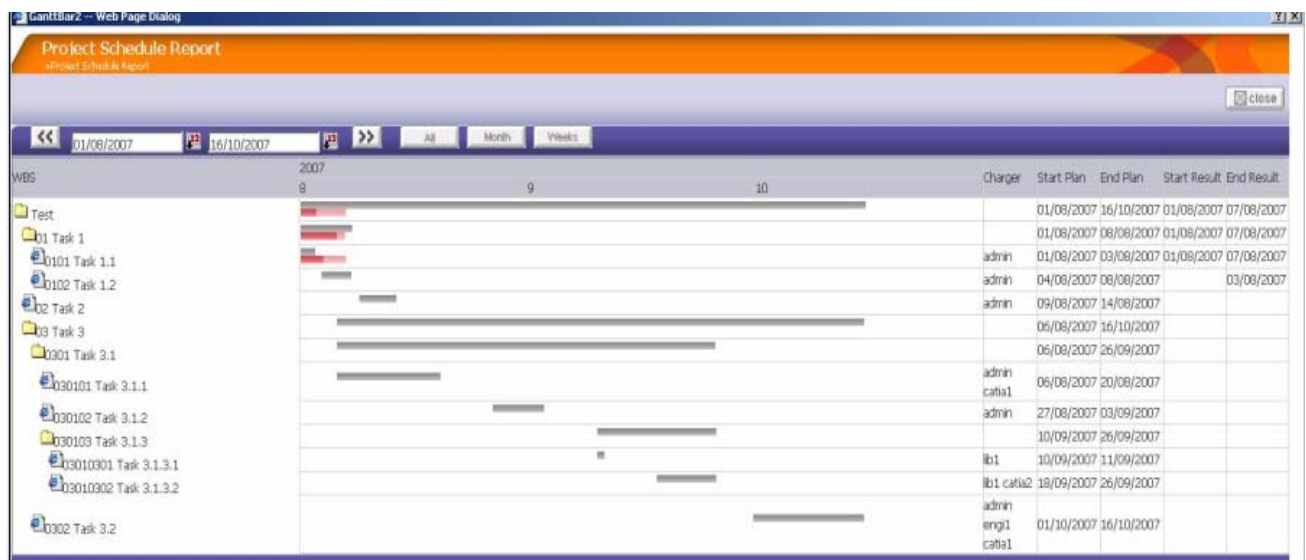
OEM:

Progress Status:

**Project Search Result**

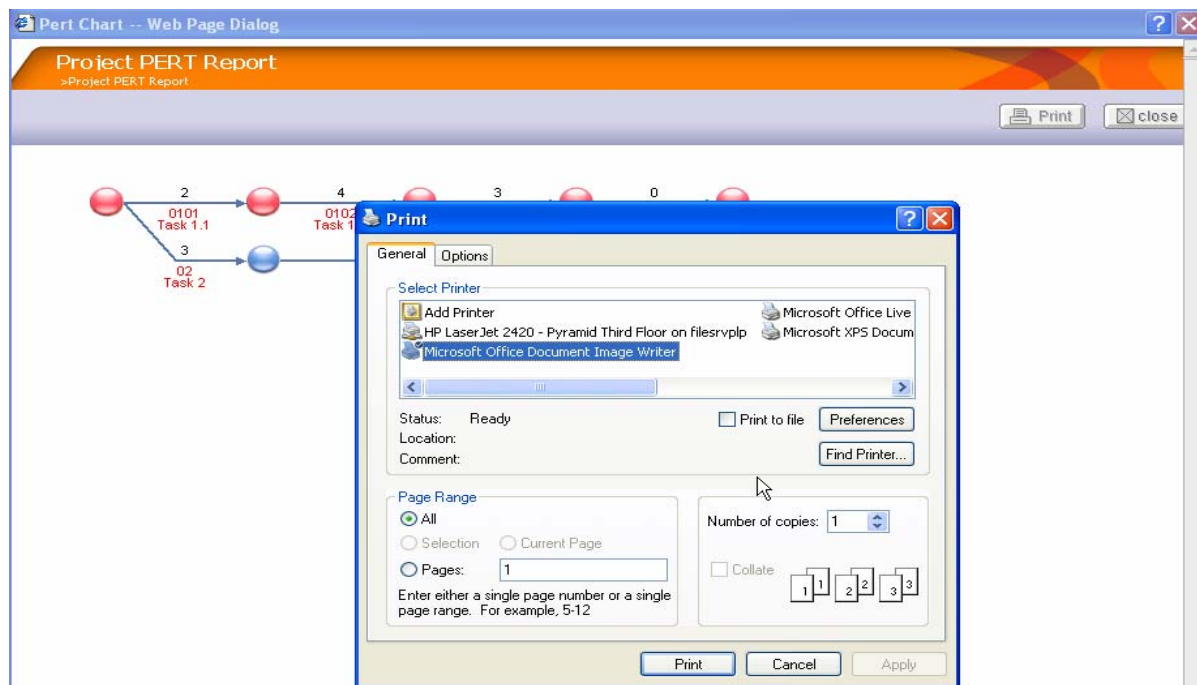
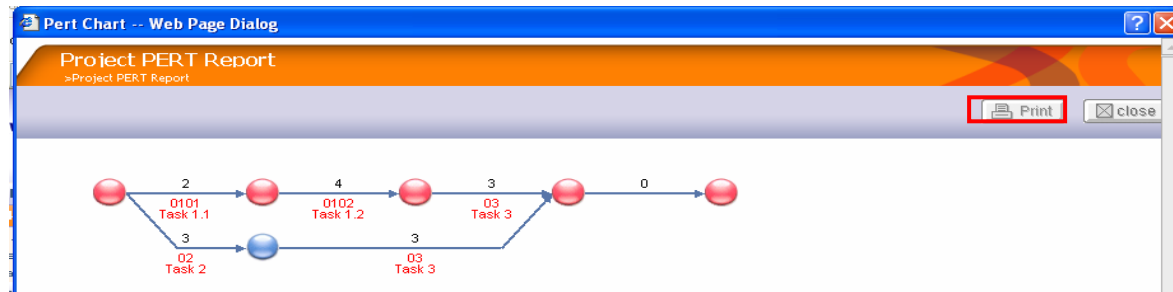
Project Name	Progress
Project2	<div style="width: 10px; height: 10px; background-color: red;"></div>
Project1	<div style="width: 10px; height: 10px; background-color: red;"></div>

## b. WBS Visualization with Gantt Chart



## c. Critical Path with Pert Chart.

The PERT chart can also be printed using “print” button on the page.



#### d. Resource Workload View.

ResourceBar -- Web Page Dialog

### Project Resource Report

Smart Project>User Project>Project Resource Report

User Name	User ID	Division	Title	2006		
				11		12
PLM Datab..	admin					
,Engineer	engi1					
,Designer	desi1					
Manager,P..	proj1					
Sum				0.3		0.1
				0.1		0

#### e. Deliverables Status View.

Review Outputs -- Web Page Dialog

### Review Outputs

Browse Object>Review Outputs

[Export to Excel](#) [close](#)

No.	Task Name	Output ID	Output No	Output Name	Output Creator	Output Revision	Output W/F Sta
000	Task 1						
001	Task 1.1	DOC-000-052	DOC-000-052	Deliverable1	Administrator		New
002	Task 1.2	DOC-000-054	DOC-000-054	Deliverable3	Administrator		New
003	Task 2	DOC-000-054	DOC-000-054	Deliverable3	Administrator		New
004	Task 3	DOC-000-060	DOC-000-060	Deliverable4	Administrator		New
005	step 1 for test						
006	Task new 1						
007	new step 2						
008	task demo						

#### f. Cost Comparison View.

**Review Cost**  
Review Cost

Export to Excel Close

No.	Task Name	Budget	Real cost
000	Task 1	2000	800
001	Task 1.1	1000	300
002	Task 1.2	1000	500
003	Task 2	1000	2000
004	Task 3	23010	4200
005	Task 3.1	17010	2200
006	Task 3.1.1	10010	200
007	Task 3.1.2	1000	0
008	Task 3.1.3	6000	2000
009	Task 3.1.3.1	1000	2000
010	Task 3.1.3.2	5000	0
011	Task 3.2	6000	2000



Microsoft Excel - Output[1].xls

File Edit View Insert Format Tools Data Window Help

FX F5

	A	B	C	D	E	F	G	H	I
1	No.	Task Name	Budget	Real cost					
2	0	Task 1	2000	800					
3	1	Task 1.1	1000	300					
4	2	Task 1.2	1000	500					
5	3	Task 2	1000	2000					
6	4	Task 3	23010	4200					
7	5	Task 3.1	17010	2200					
8	6	Task 3.1.1	10010	200					
9	7	Task 3.1.2	1000	0					
10	8	Task 3.1.3	6000	2000					
11	9	Task 3.1.3.1	1000	2000					
12	10	Task 3.1.3.2	5000	0					
13	11	Task 3.2	6000	2000					
14									
15									
16									
17									
18									
19									

Sheet1 Sheet2 Sheet3

Ready

**NOTE:** After the completion of chapter 1, the user should be aware of all the functionalities of SmartProject User application bar.

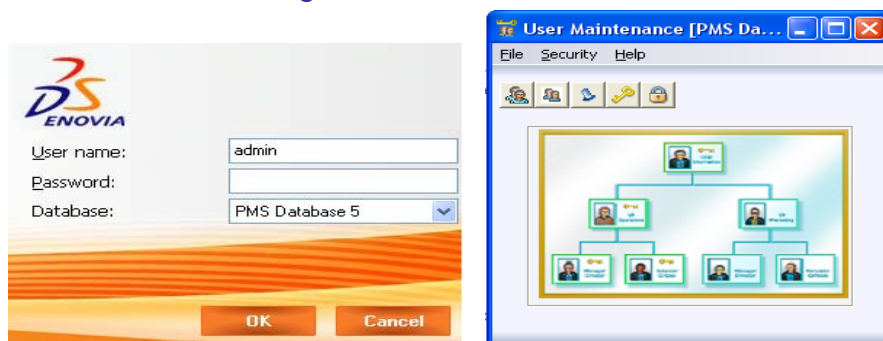
## 2 Prerequisite Settings for New Project

This chapter explains all the prerequisite Admin Tasks to be performed, related to SmartProject, before starting or creating any new Project.

Note: The below detailed settings are for the scenario that is described in the next chapter, which is just a small example to guide the user.

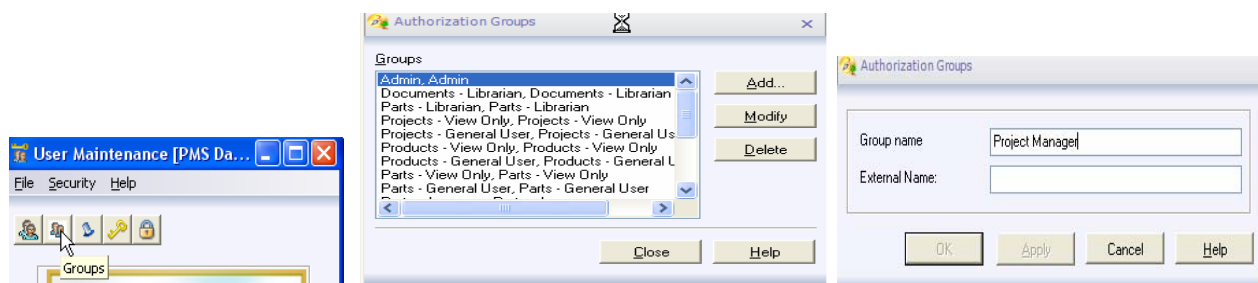
## 2.1 User Settings

Launch **User Maintenance** through Start/Programs/SMARTTEAM/Administrative Tools/User Maintenance and Login.



### 2.1.1 Create Related Groups

Click on the **Groups** button and add the below mentioned three Groups:

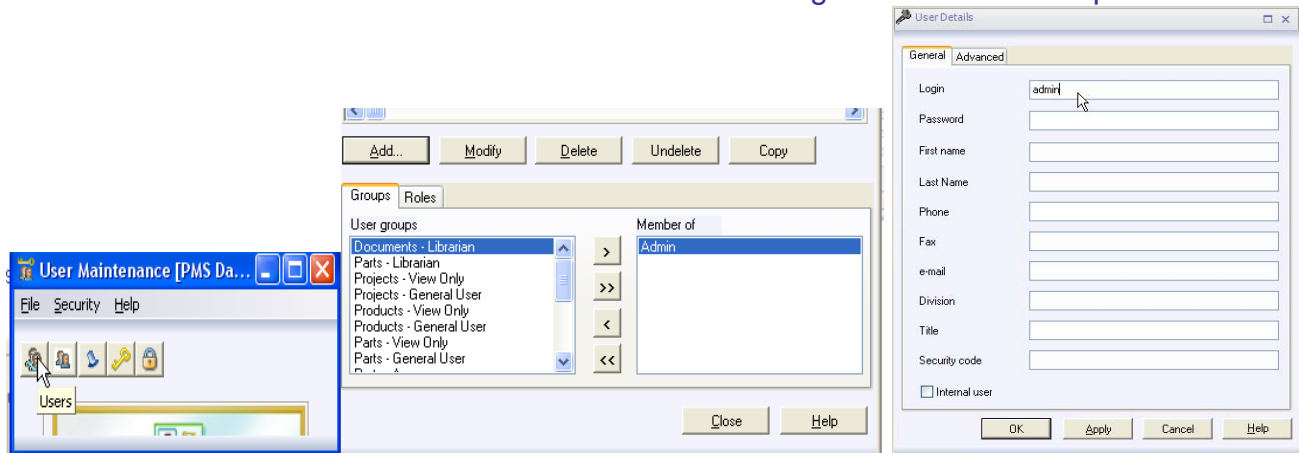


1. Project Manager.
2. Project Leader.
3. PMS Engineer.

After completing close the Administrative Groups window.

## 2.1.2 Create Related Users

Click on the **Users** button. Add the below Users and assign each to the Groups mentioned:

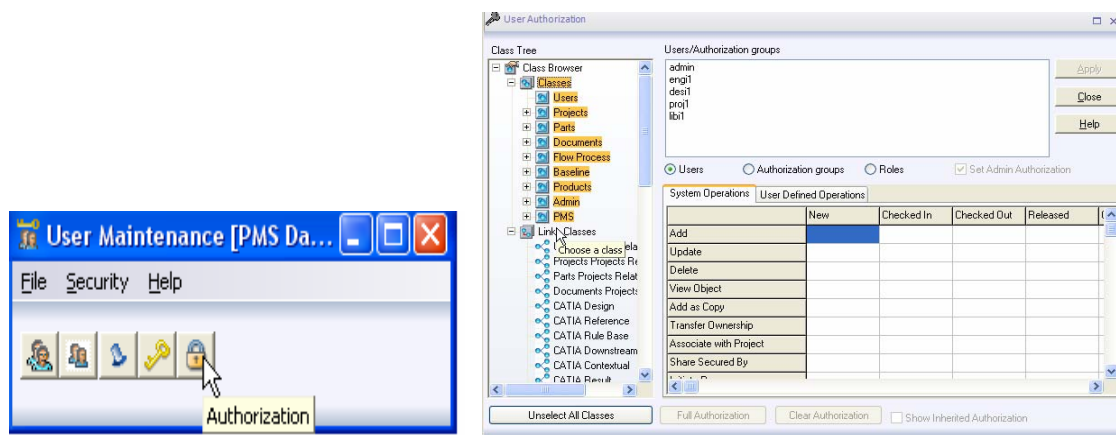


1. admin and proj1 to Group Project Manager.
2. eng1 to Group Project Leader.
3. eng1 and desi1 to Group PMS Engineer.

After completing close the Users window.

## 2.1.3 Authorization

Click on the **Authorization** button. Select the **Authorization Groups** option.



First select the Group and the Class from the Class Browser and then give the authorization as per the Project requirements.

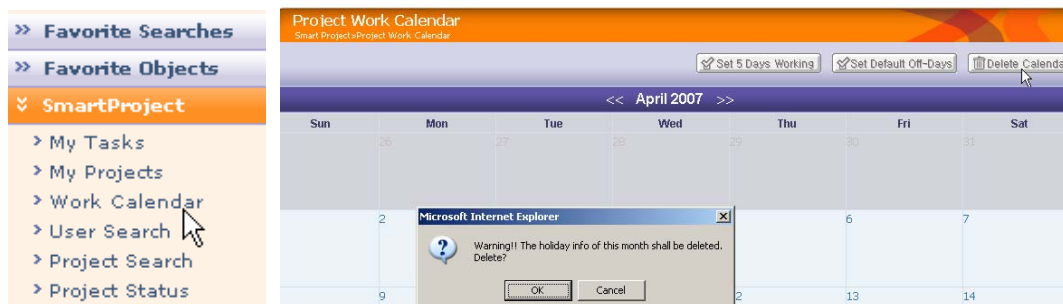


## 2.2 Work Calendar

Launch **SMARTTEAM Web Editor** through Start/Programs/SMARTTEAM/SMARTTEAM Web Editor Server and Login as admin and select the correct database and **Connect**.



From the SmartProject application bar, first click on **Work Calendar** and then click **Delete Calendar**. For the current year the user needs to define following:



### 2.2.1 Set the Working Days and Weekends

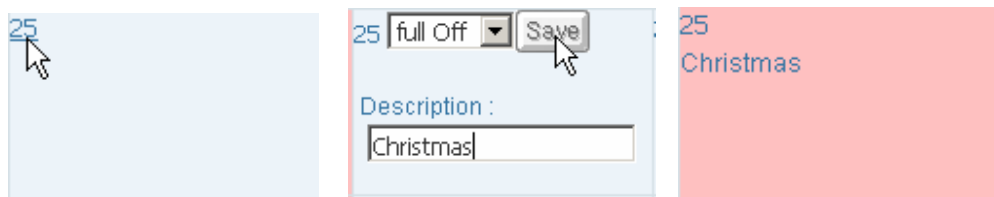
Click on the **Set 5 days Working** button. This will set all Saturdays and Sundays as off and will be displayed as highlighted. This can also be set from **Set Default Off-Days** button.



### 2.2.2 Set the Company Days-Off

Click on the **Date** for which the Company Day-Off is to be defined.  
E.g. Click on 25th December 2006. Set it as **full off** and give the description and click **Save**. The particular date will be highlighted as shown.





Do it for all the dates in which Company Holiday falls for the current year.

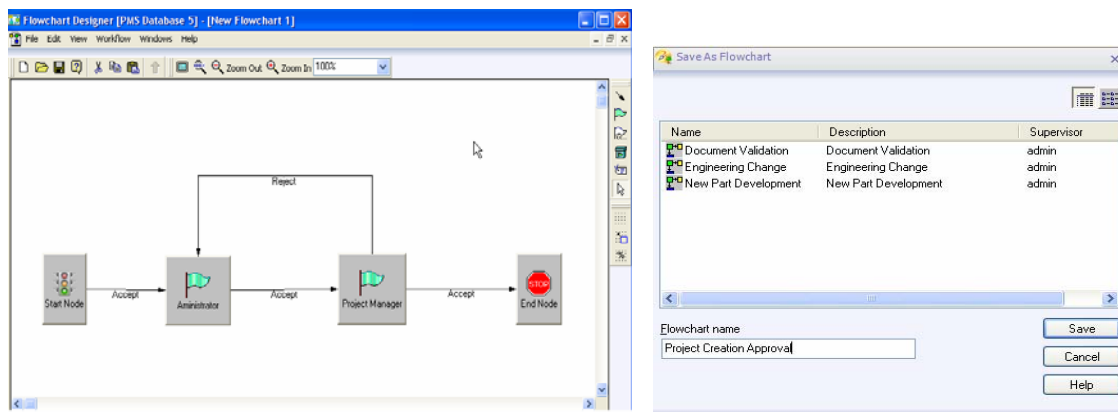
## 2.3 Work Flows

The admin need to create the flowcharts, for the defined respective SmartProject Processes, for getting the approval from the responsible users. For the SmartProject, by default below three processes are defined in the Data Model Designer for which the flowcharts will be created as per the Project requirements.

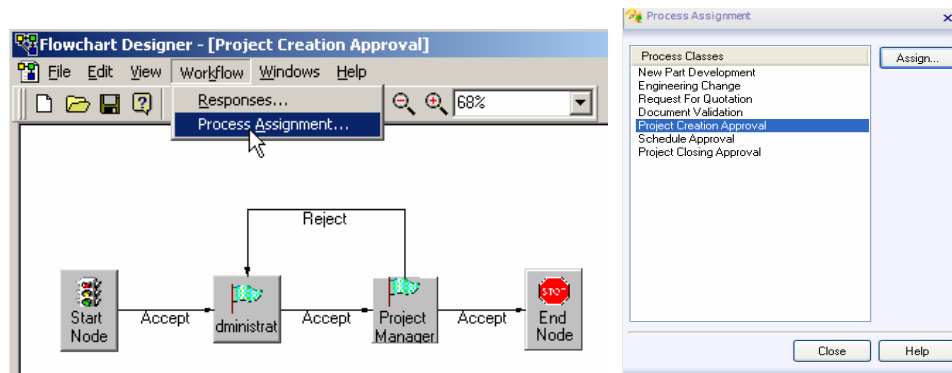
Launch **Flowchart Designer** through Start/Programs/SMARTTEAM/Administrative Tools. Login as admin and create flowcharts for the below processes.

### 2.3.1 Define Project Creation Approval

Depending on the users responsible for this process, create the process flowchart with all the relevant information. Save the flowchart and give a name to it.



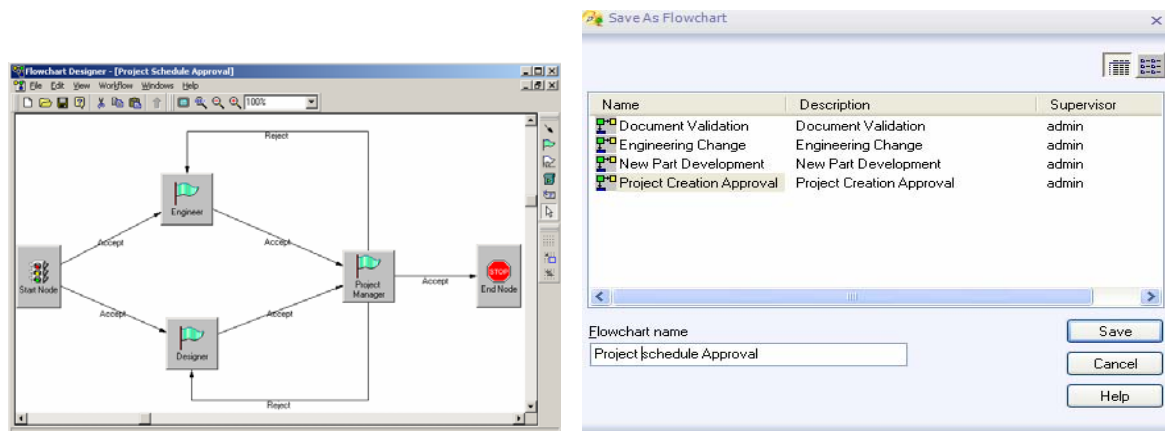
After saving the flowchart, click **Process Assignment** to assign the flowchart to the Project Creation Approval Process.



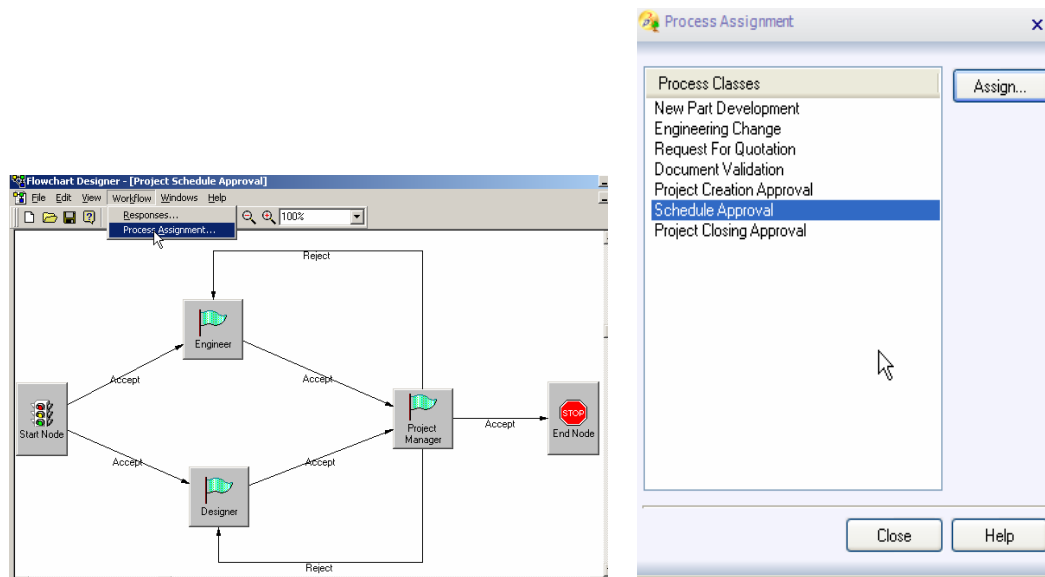
Close this flowchart.

### 2.3.2 Define Project Schedule Approval

Depending on the users responsible for this process, create the process flowchart with all the relevant information. Save the flowchart and give a name to it.



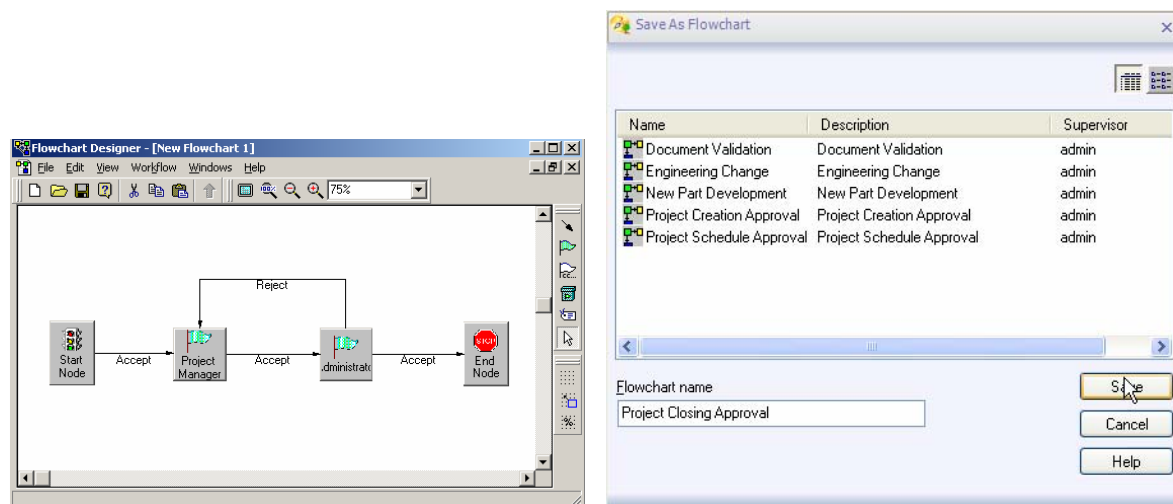
After saving the flowchart, click **Process Assignment** to assign the flowchart to the Project Schedule Approval Process.



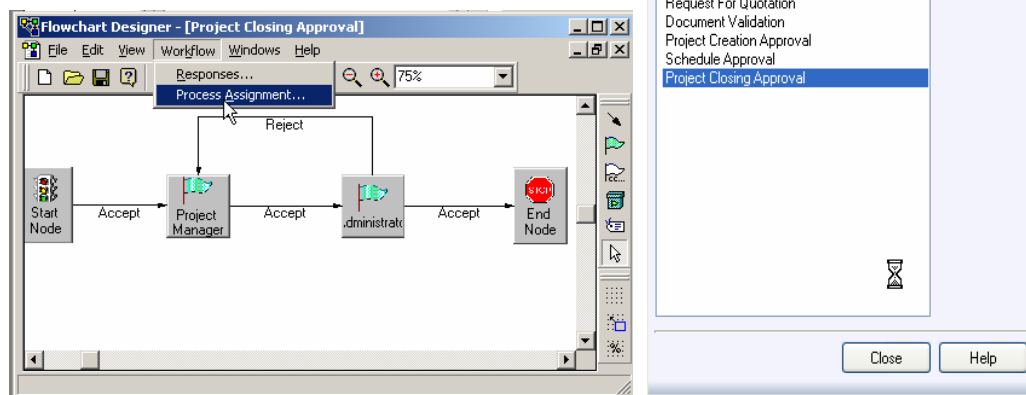
Close this flowchart.

### 2.3.3 Define Project Closing Approval

Depending on the users responsible for this process, create the process flowchart with all the relevant information. Save the flowchart and give a name to it.



After saving the flowchart, click **Process Assignment** to assign the flowchart to the Project Closing Approval Process.



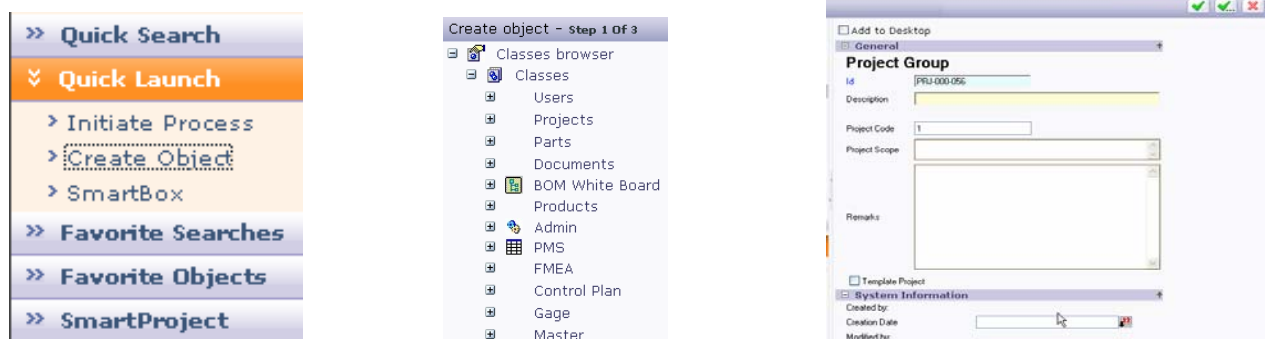
Close this flowchart.  
Exit from the Flowchart Designer.

Note: The flowchart creation will be totally dependent on the Project and will vary from project to project, so this will be a part of the settings to be done before starting of any Project.

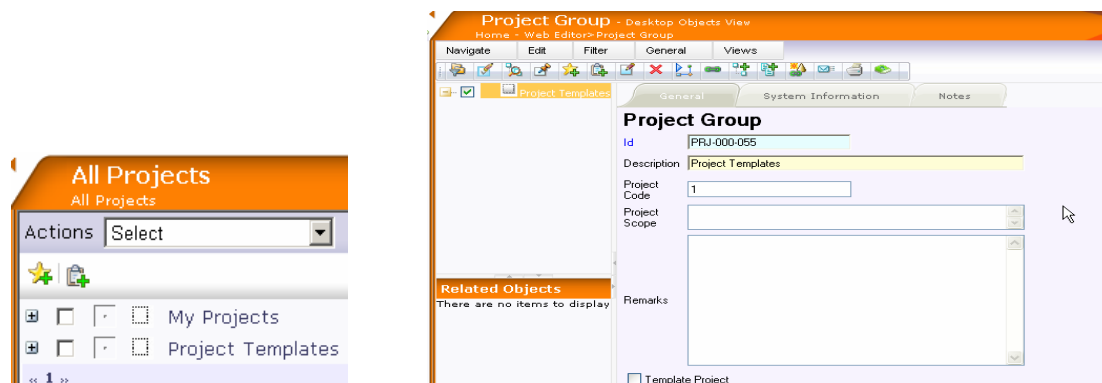
## 2.4 Project Template Creation

### 2.4.1 Project Group Creation

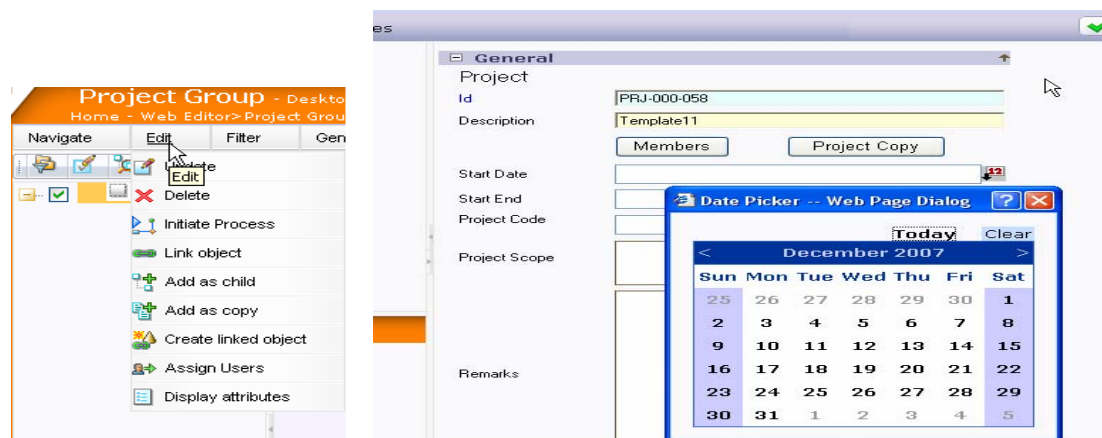
In SMARTTEAM Web Editor, click on **Create Object**, select **Project Group** class from the Class Browser. Enter the description **Project Templates** and click **Create And Finish**.



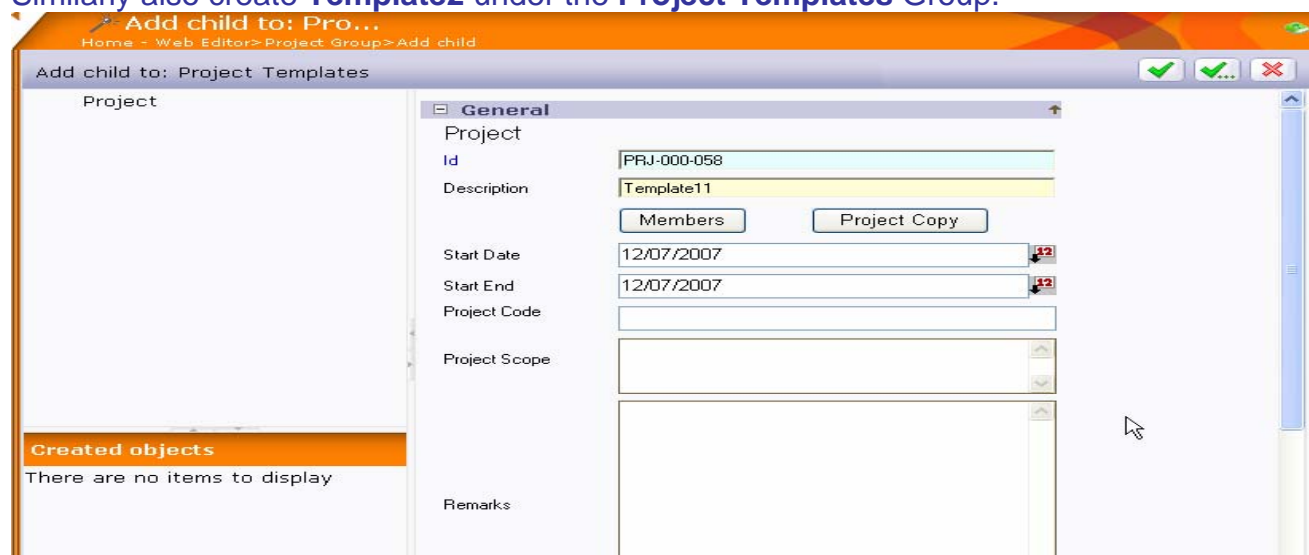
From the Recent Objects list, select and open the **Project Templates** Project Group.



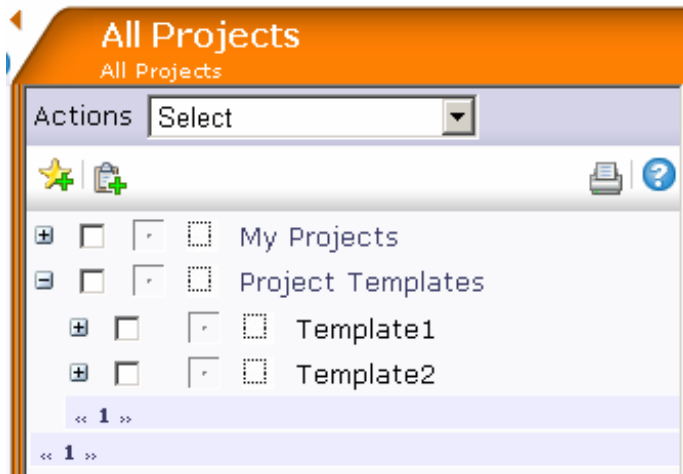
Perform **Add as Child** Action on it to create **Project Template1** under the **Project Templates** Group. Enter the **Description**, **Start Date** and **End Date** fields. Click **Create And Finish**.



Similarly also create **Template2** under the **Project Templates** Group.



**Template1** and **Template2** are seen under the **Project Templates**.

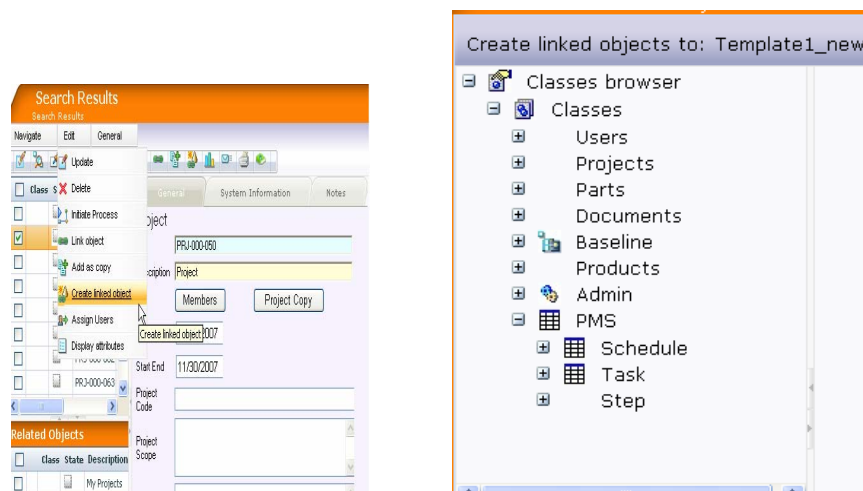


## 2.4.2 Template WBS Definition

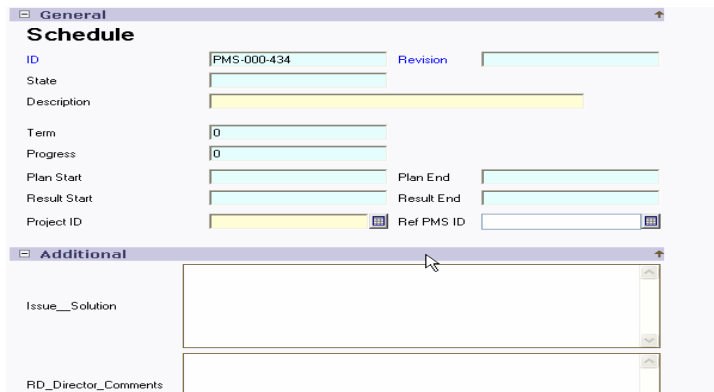
The user needs to define **WBS** for both the projects **Template1** and **Template2**.

### 1. WBS for Template1:

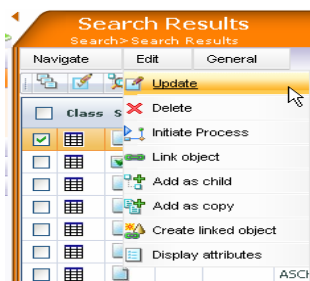
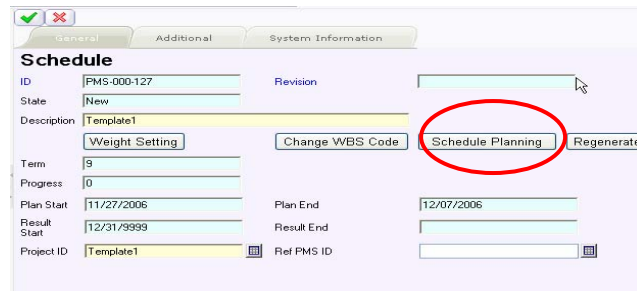
Open the **Template1** and perform **Create Linked Objects** Action on it, select **PMS Schedule** under the **PMS** tree.



Enter the **Description** and the **Project ID** fields and click **Create And Finish**.



Open the **Schedule** and perform **Update** Action on it, click **Schedule Planning** and then select the No. to add the objects under the Schedule.

No.	Task Name	Duration	Plan Start Date	Plan End Date
	Schedule	8	2006-11-27	2006-12-06

First add the **Step** and enter **Task Name**, **Duration**, **Plan Start Date** and **Plan End Date** fields and click **Save**. Similarly add **Task1** and **Task2** under the Step and **Task3** under the Schedule as shown below:

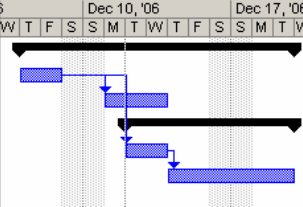
No.	Task Name	Duration	Plan Start Date	Plan End Date
1	Template1	8	2006-11-27	2006-12-06
2	01: STEP	8	2006-11-27	2006-12-06
3	0101: Task1	5	2006-11-27	2006-12-01
4	0102: Task2	1	2006-12-04	2006-12-04
Task	Task3	2	2006-12-04	2006-12-04

Close the page and validate **OK** to Update of Schedule.

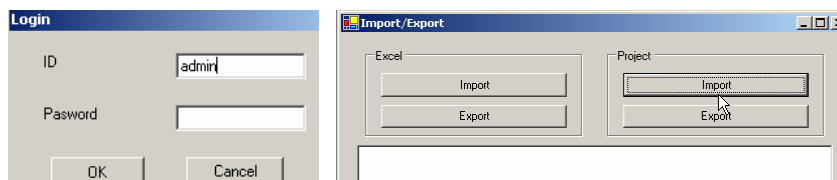
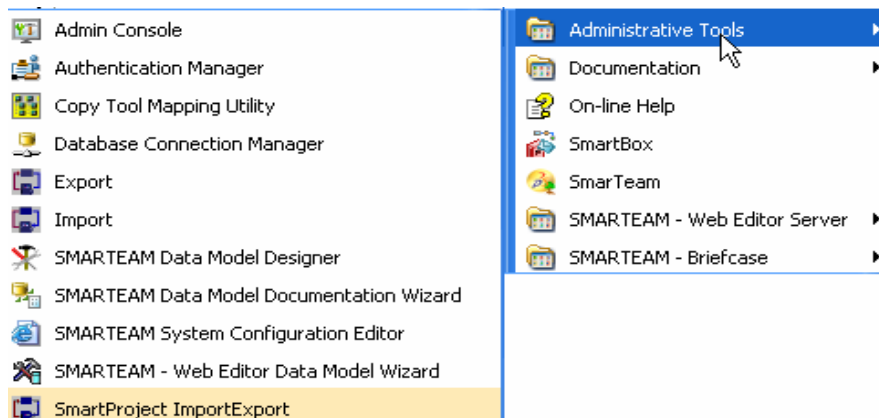
## 2. WBS using Microsoft Project:

Launch **Microsoft Project** and create **WBS** in it with all the dependency defined. Save and close the file.

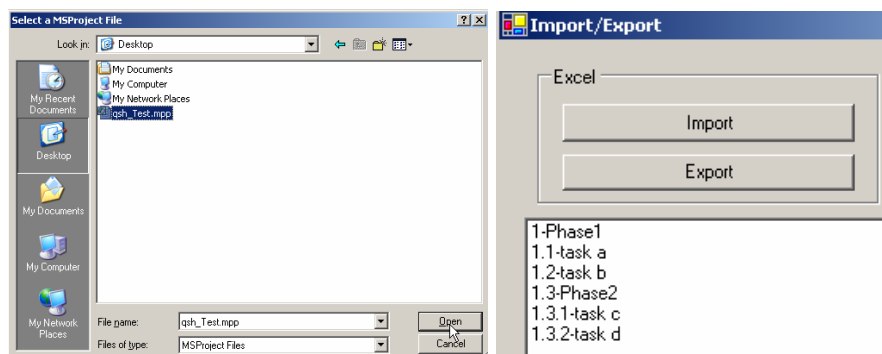
	Task Name	Duration	Start	Finish	Predecessors	
1	Phase1	9 days?	Thu 12/7/06	Tue 12/19/06		
2	task a	2 days	Thu 12/7/06	Fri 12/8/06		
3	task b	3 days	Mon 12/11/06	Wed 12/13/06	2	
4	Phase2	6 days?	Tue 12/12/06	Tue 12/19/06		
5	task c	2 days?	Tue 12/12/06	Wed 12/13/06	2	
6	task d	4 days?	Thu 12/14/06	Tue 12/19/06	5	



Launch **SmartProjectImportExport.exe** and **Login**. Click **Import** button from **Project**.



Browse to the location of the file and click **Open**.



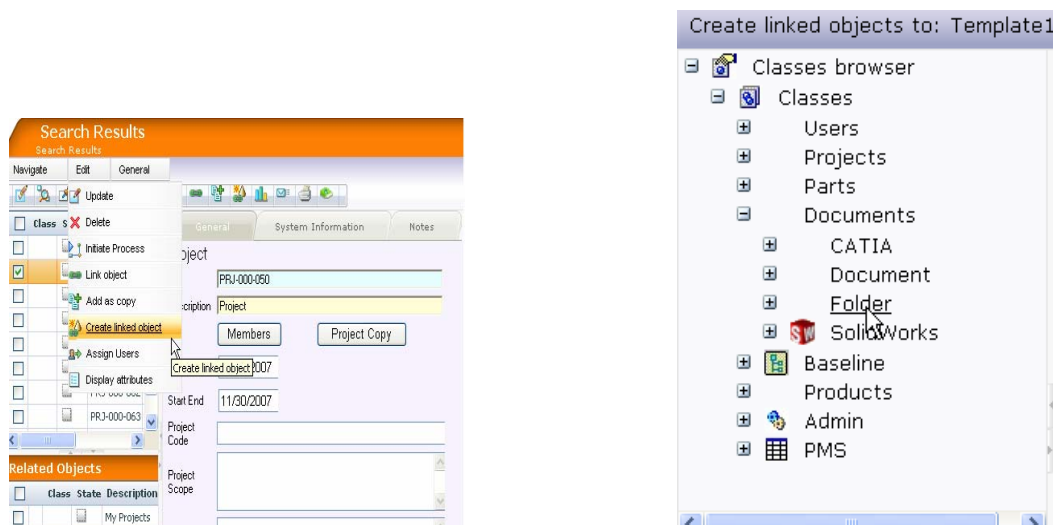
The file gets imported into SMARTEAM and creates new **Project** and schedule named from the **file name**. The whole WBS is copied with all the dependencies.



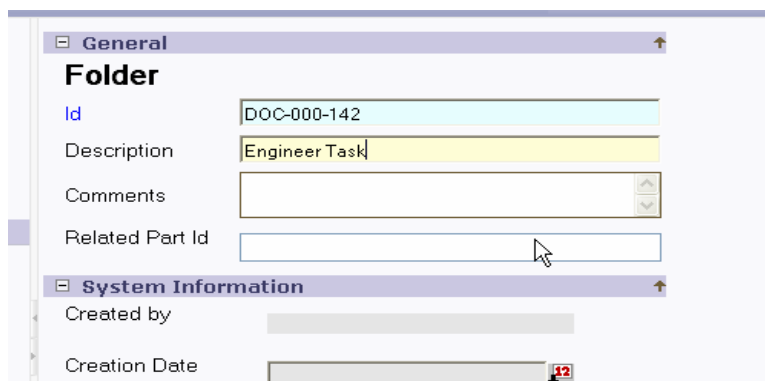
## 2.4.3 Template Deliverable Structure Definition

### 1. Deliverable Structure for Template1:

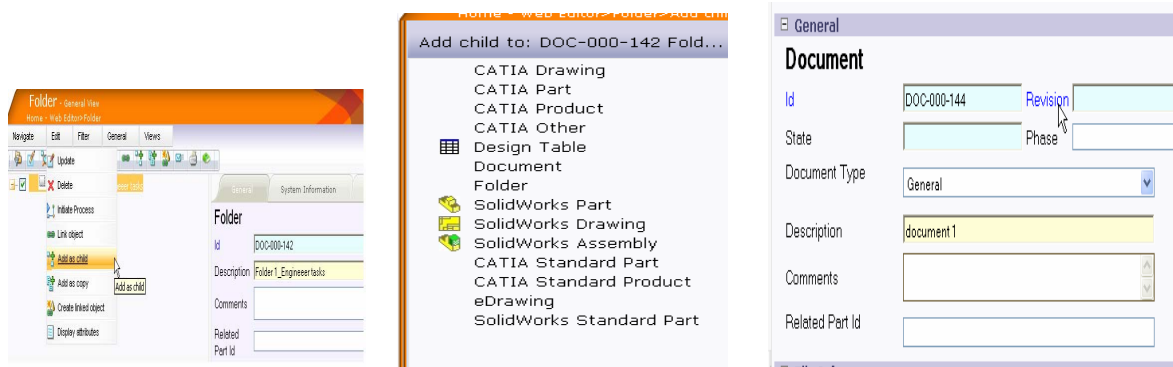
Select and open the **Template1** Project and perform **Create Linked Objects** Action on it, select **Folder** under the Documents tree.



Enter the **Description** and click **OK**.



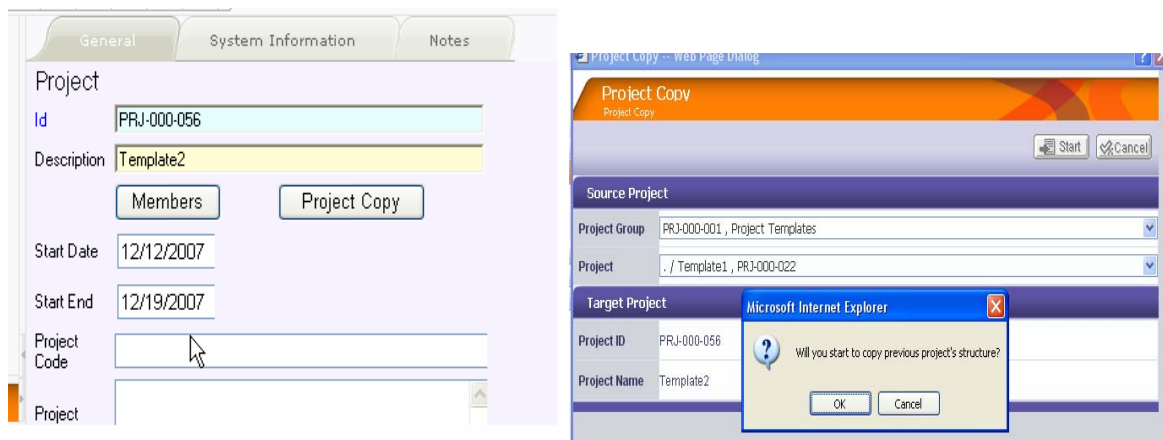
Open the **Folder** and perform **Add as Child** Action on it, select **Document**, enter the **Description** and click **OK**.



Similarly also create **Designer Task** Folder under **Template1** and **Design Doc** Document under **Designer Task**.

## 2. Deliverable Structure for Template2:

Select and open the **Template2** Project and click **Project Copy**, select in Source Project, Project Templates and Template1 as shown and click **Start**.

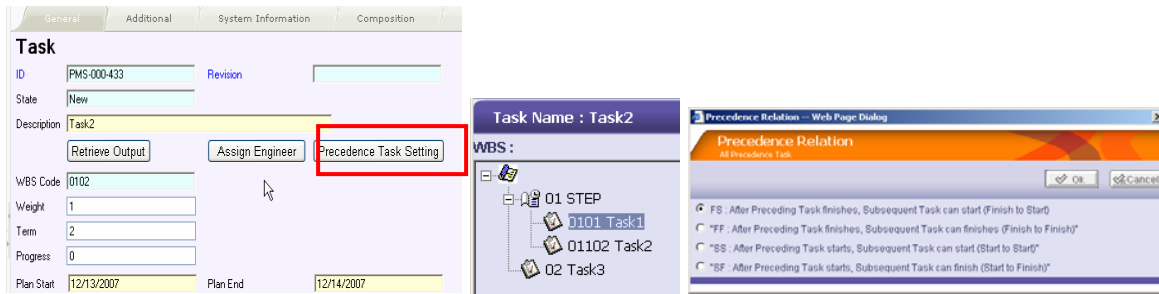
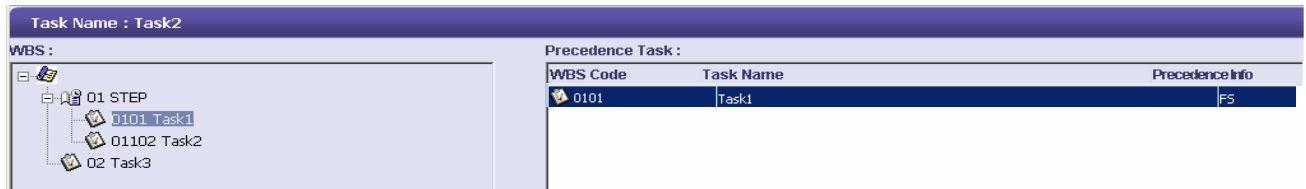


Check the results after it is completed:

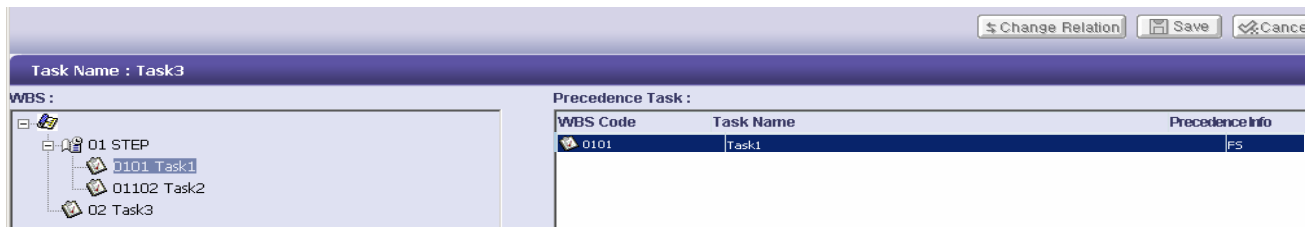
### 2.4.4 Dependency Definition

#### 1. Defining Dependency for Template1:

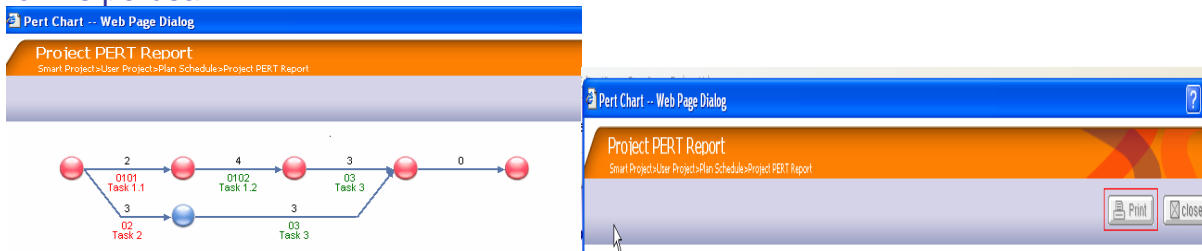
Select and open the **Task2** of **Step**, click **Precedence Task Setting** and select **Task1** and move it to the right pane. Select the **Precedence Relation** option as per the requirement. Click **Save** and close the web page.

Similarly assign **Task1** as the **Precedence Task** for the **Task3** also.



Check the **Pert** chart to see the dependency flow. Also the user can **print** the pert chart for his perusal.



## 2. Defining Dependency for Template2:

As the **Template2** was imported from the **MS Project**, all the dependencies, defined in it during creation, are also imported into the imported Project.

Task Name : Task b

WBS:

- 01 Phase1
  - 0101 Task a
    - 01102 Task b
      - 011103 Phase2
        - 01110301 task c
          - 0111031110302 Task d

Precedence Task :

WBS Code	Task Name
0101	task a

Task Name : task c

WBS:

- 01 Phase1
  - 0101 Task a
    - 01102 Task b
      - 011103 Phase2
        - 01110301 task c
          - 0111031110302 Task d

Precedence Task :

WBS Code	Task Name
0101	task a

Task Name : Task d

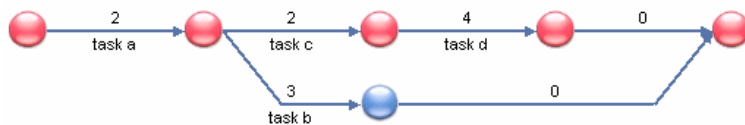
WBS:

- 01 Phase1
  - 0101 Task a
    - 01102 Task b
      - 011103 Phase2
        - 01110301 task c
          - 0111031110302 Task d

Precedence Task :

WBS Code	Task Name
010301	task c

Check the **Pert** chart to see the dependency flow.



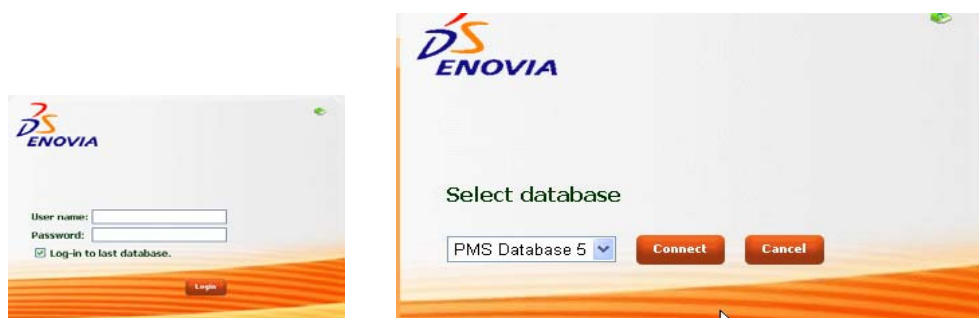
## 3 End User Scenario on SmartProject

This chapter gives one small example of SmartProject application.

### 3.1 End User Operations

#### 3.1.1 Phase 1: Project Creation

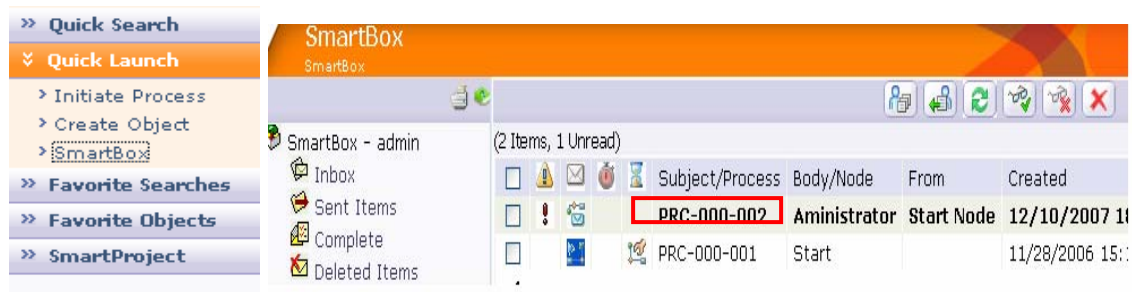
1. Launch SMARTEAM Web Editor.
2. Log in as **admin** and connect to the correct database.



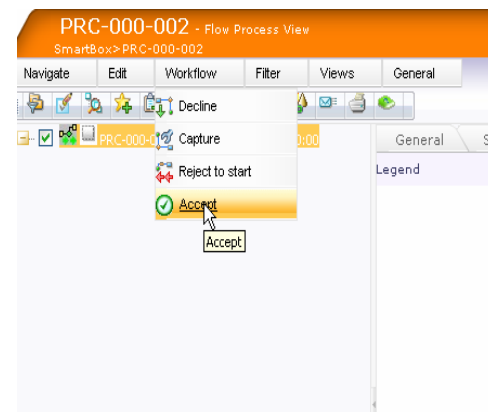
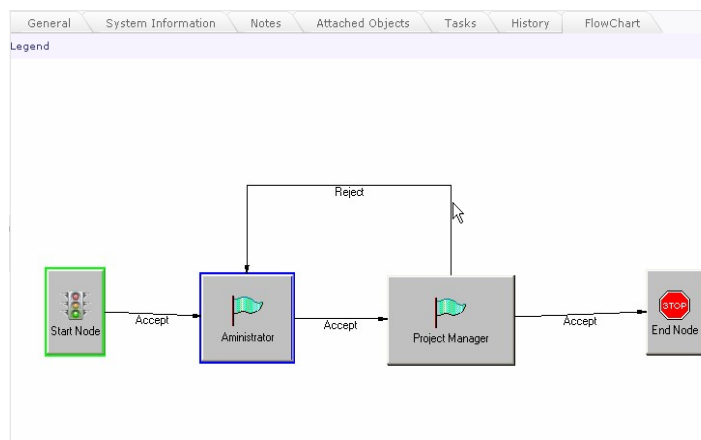
3. Click on **Initiate Process** from **Quick Launch** toolbar and start a **Project Creation Approval** process for the need that has been identified.
  - Fill the Importance field as High Importance.
  - Enter the End Time Date.
  - Click Finish.



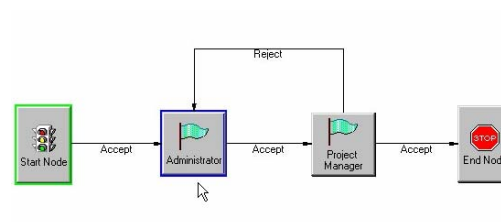
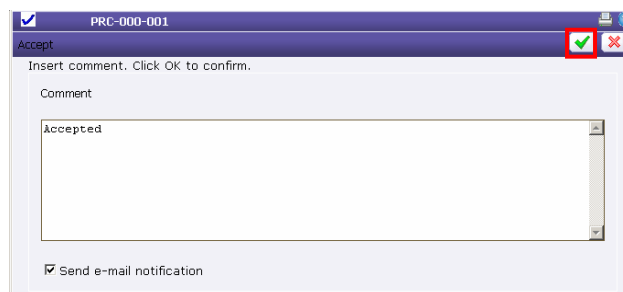
4. Click on **SmartBox** from **Quick Launch** toolbar and select the process in Inbox.



- Switch to Flow Chart tab and view it.
- Perform Accept Action on it.



- Enter some comments and validate with ok.
- Again have a look on Flowchart, it is moved to second node for which user **admin** is only responsible.



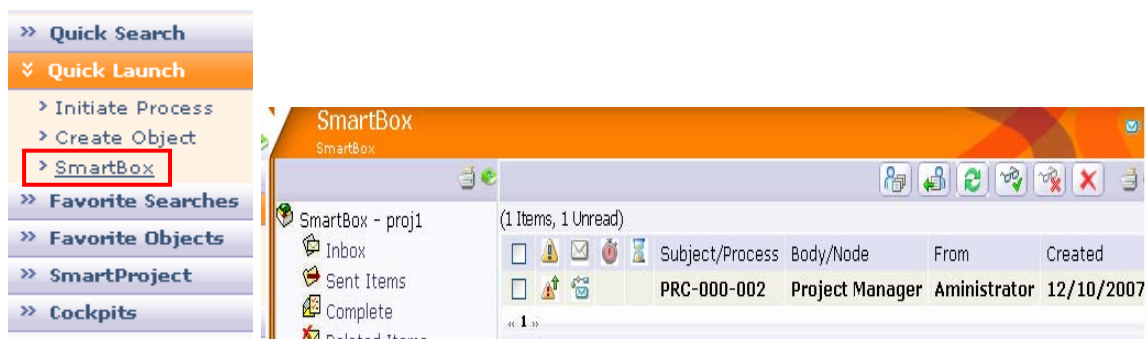
- Again perform Accept on it and validate with ok.
- Check the Inbox. No process will be displayed for admin user.



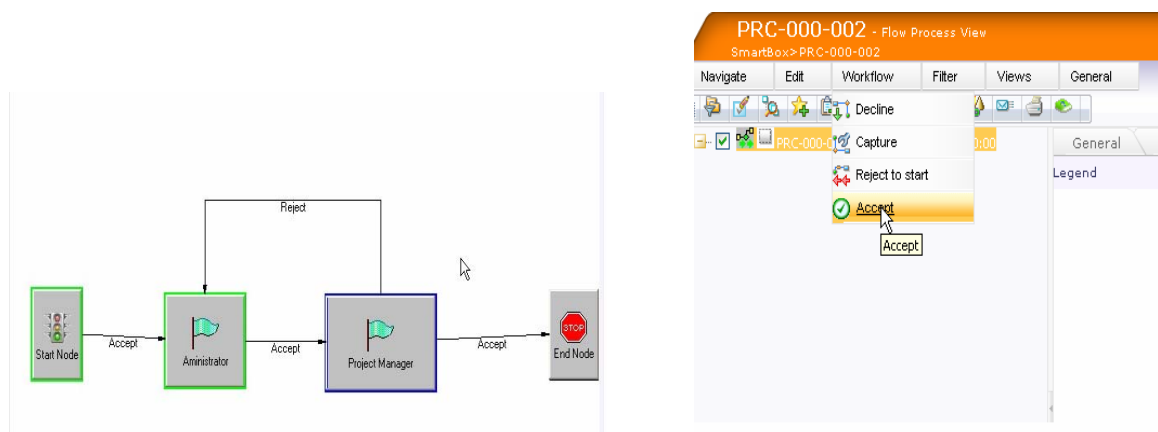
5. Click **Logout**.
6. Log in as **proj1** and connect to the correct database.



7. Click on **SmartBox** from **Quick Launch** toolbar and select the process in Inbox.



- Switch to Flow Chart tab and view it.
- Perform Accept Action on it.



- Enter some comments and validate with ok.



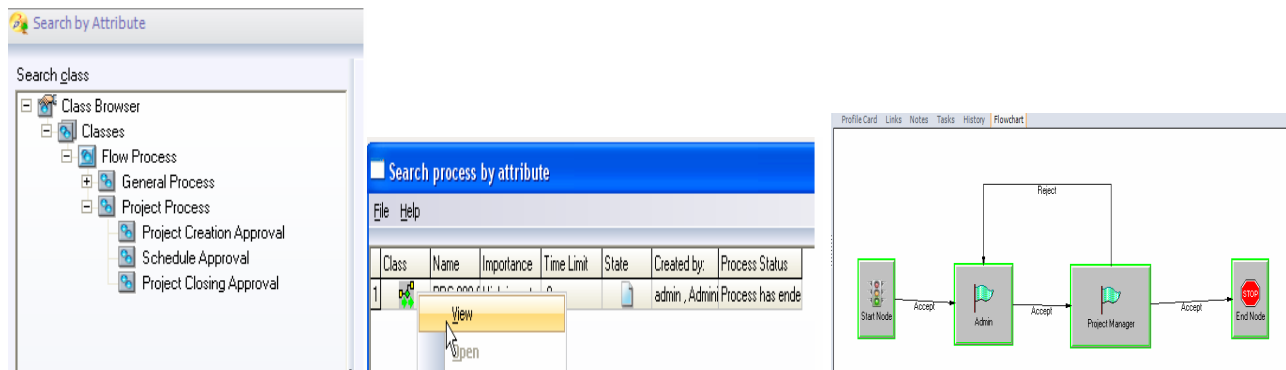
- Check the Inbox. No process will be displayed for proj1 user.



## 8. Click **Logout**.

## 9. Launch **Workflow Manager** to view the progress of the process.

- Search for Project Creation Approval process and view it.
- All the nodes are displayed as completed.
- Close the Workflow Manager.



## 10. Log in as **admin** into SMARTEAM Web Editor and connect to correct database.





ENOVIA

User name:

Password:

☒ Log-in to last database.

Login



ENOVIA

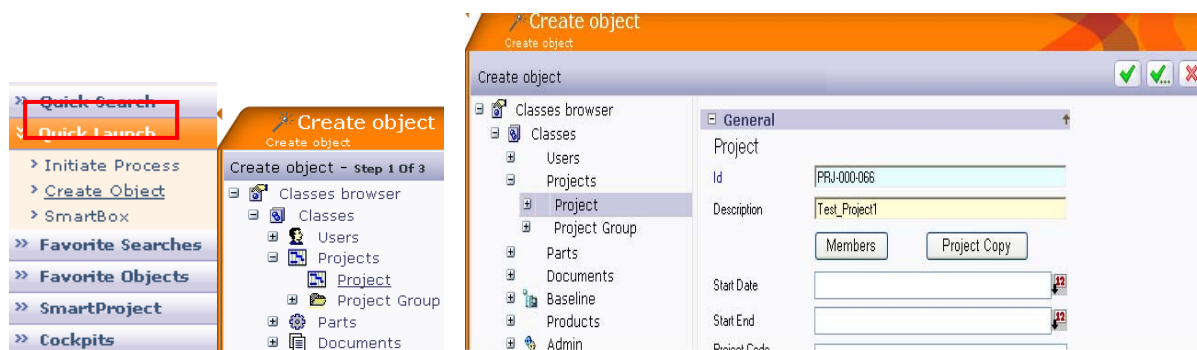
Select database

PMS Database 5

Connect Cancel

11. Click on **Create Object**; select **Project** class from the Class Browser.

- Enter the Description Test Project, the Start Date and the End Date.
- Click Create And Finish.



Create object

Create object - Step 1 Of 3

Classes browser

- Classes
  - Users
  - Projects
    - Project
  - Project Group
  - Parts
  - Documents
  - Baseline
  - Products
  - Admin

General

Project

Id: PRJ-000-066

Description: Test\_Project1

Members Project Copy

Start Date:

Start End:

Project Code:

12. Click on **Members** button and click **Add** on Project Manager to assign user **proj1** to it.



General System Information Notes

Project

Id: PRJ-000-066

Description: Test\_Project\_11-12-07

Members Project Copy

Start Date: 12/11/2007

Start End: 12/18/2007

Project Code:

Save Close

Add Delete

Skill

Search Result

Logon ID	Name
<input checked="" type="checkbox"/> proj1	, proj1
<input type="checkbox"/> pm	Manager, Project
<input type="checkbox"/> admin	PLM Database, Administrator

- Check proj1 is added under Project Manager.
- Click Save and close it.

Project Manager						
Logon ID	Name	Title	Division	Role	Skill Group	Skill
<input type="checkbox"/> proj1	proj1			PMS Engineer		

Project Leader						
Logon ID	Name	Title	Division	Role	Skill Group	Skill

Participants						
Logon ID	Name	Title	Division	Role	Skill Group	Skill

13. Click **Logout**.

### 3.1.2 Phase 2: Project Definition

1. Log in as **proj1** and connect to the correct database.



User name:

Password:

☐ Log-in to last database.

Login



Select database

PMS Database 5

Connect Cancel

2. Click on **My Projects** from SmartProject User application bar, select **Test Project** and click **Participant** button on its profile card.

>> Favorite Searches

>> Favorite Objects

>> SmartProject

> My Tasks

> **My Projects**

> Work Calendar

> User Search

Project

Test Project

Project Basic Info

Participant WBS Copy

Project ID PRJ-001

Project No PRJ-001

Project Name Test Pr

- Click Add on Project Leader to assign user engi1 to it.
- Click Add on Participants to assign user desi1 to it.
- Click Save and close it.


Project Manager						
Logon ID	Name	Title	Division	Role	Skill Group	Skill
<input type="checkbox"/> proj1	, proj1			Project Manager		

Project Leader						
Logon ID	Name	Title	Division	Role	Skill Group	Skill
<input type="checkbox"/> eng1	, Engineer			PMS Engineer		





Participants						
Logon ID	Name	Title	Division	Role	Skill Group	Skill
<input type="checkbox"/> desi1	, Designer			PMS Engineer		

### 3. Click on **Project Copy**.

- Select Project Templates and Template1 for the Source Project.
- Click Start and validate ok to the completion message.
- Project Copy tool will do WBS copy + Documents Copy.


Test Project

### Project Basic Info

 Participant
 WBS Copy
 Documents Copy
 Project Copy

Project ID:

Project No:

Project Name:

Start Date:  End Date:

### Project Copy

Smart Project>User Project>Project Copy

 Start
 Cancel

#### Source Project

Project Group:

Project:

#### Target Project

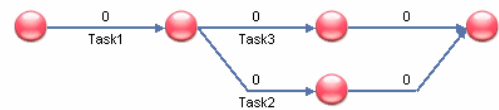
Project ID:

Project Name:



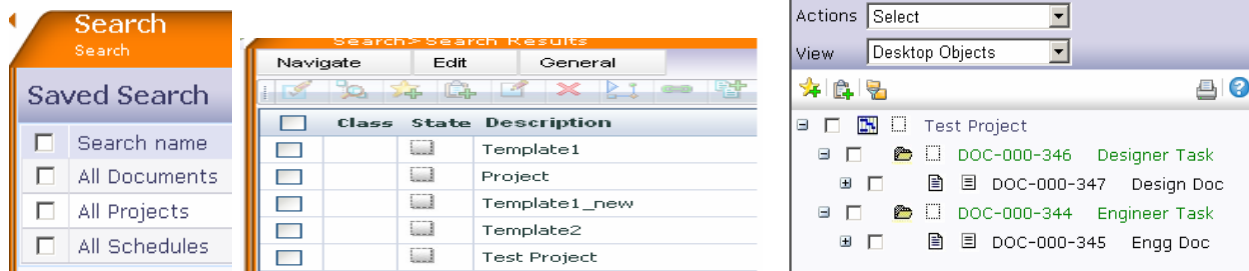
### 4. Refresh the page and select **Test project** Schedule under the Test Project.

- Click the Pert chart to confirm the copy of the dependency information from Template1 and then close it.

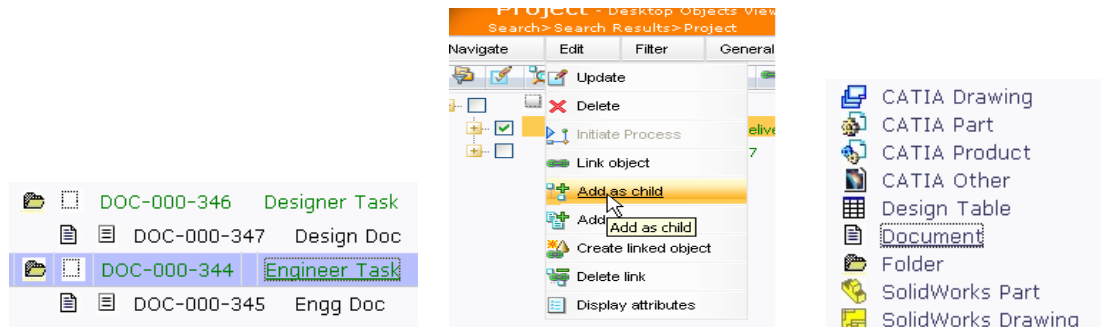


##### 5. Run the Search for **All Projects** and select **Test Project** from the list.

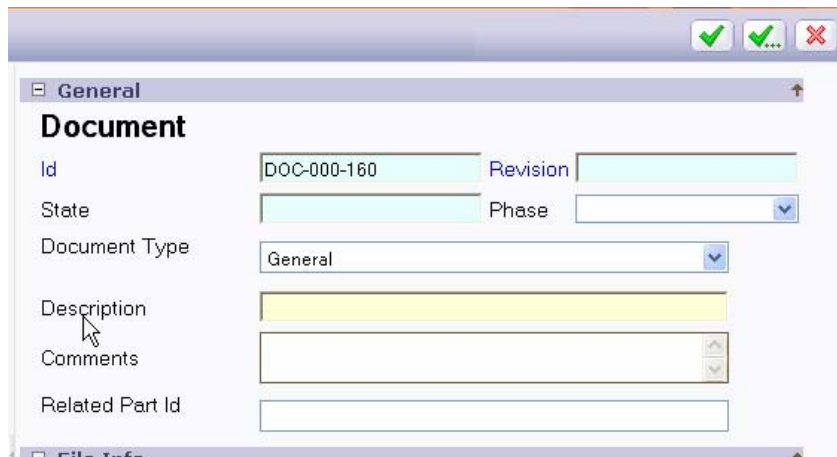
- View the links for this Project.
- Expand the Documents to confirm the copy of the Deliverable Structure from Template1.



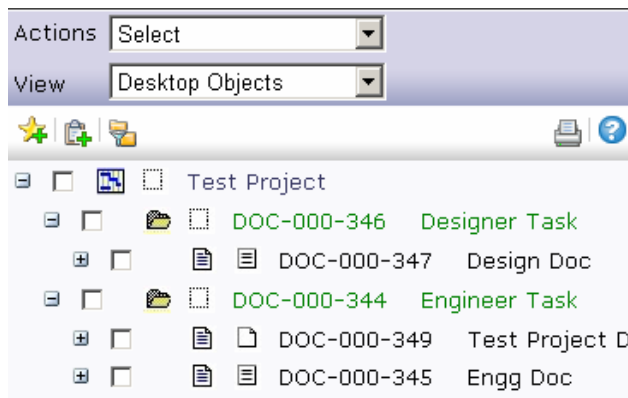
- Click on Engineer Task Folder and perform Add as Child Action on it and select Document from the Select Class.



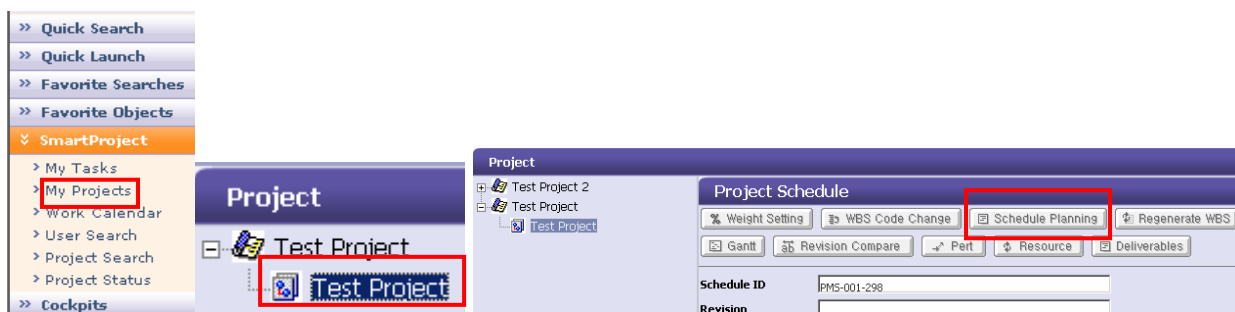
- Enter the Description and click Create And Finish.



- Check the updated Document Structure.



6. Click on **My Projects** from the SmartProject User application bar and select **Test Project** from the list. Click **Schedule Planning** button.



- Click LINK OUTPUT button for Task1. Select Engg Doc and move it to the right pane and enter the Weight Change.

No.	Task Name	
1	Test Project	
2	01: STEP	
3	0101: Task1	LINK OUTPUT
4	01102: Task2	LINK OUTPUT
5	02: Task3	LINK OUTPUT

Task : Task1

Documents

- DOC-000-344 Engineer Task
  - DOC-000-345 Engg Doc
  - DOC-000-349 Test Project Document
- DOC-000-346 Designer Task
  - DOC-000-347 Design Doc

Weight Change

Smart Project » User Project » F

100

- Click Save and close the page.

Task : Task1

Documents

- DOC-000-344 Engineer Task
  - DOC-000-345 Engg Doc
  - DOC-000-349 Test Project Document
- DOC-000-346 Designer Task
  - DOC-000-347 Design Doc

Doc No.	Weight	Revision	State	Description
DOC-000-345	100		Checked In	Engg Doc

- Similarly do it for Task2 and Task3.

Task : Task2

Documents

- DOC-000-344 Engineer Task
  - DOC-000-345 Engg Doc
  - DOC-000-349 Test Project Document
- DOC-000-346 Designer Task
  - DOC-000-347 Design Doc

Doc No.	Weight	Revision	State	Description
DOC-000-349	100		New	Test Project Document

Task : Task3

Documents

- DOC-000-344 Engineer Task
  - DOC-000-345 Engg Doc
  - DOC-000-349 Test Project Document
- DOC-000-346 Designer Task
  - DOC-000-347 Design Doc

Doc No.	Weight	Revision	State	Description
DOC-000-347	100		Checked In	Design Doc

- Click on Weight Setting button for the parent Test Project.

Project Name : Test Project

No.	Task Name	
1	Test Project	<b>WEIGHT SETTING</b>
2	01: STEP	WEIGHT SETTING
3	0101: Task1	LINK OUTPUT PRECEDENCE ASSIGN engineer SubProject
4	01102: Task2	LINK OUTPUT PRECEDENCE ASSIGN engineer SubProject
5	02: Task3	LINK OUTPUT PRECEDENCE ASSIGN engineer SubProject

- Set the Weight for Step and Task3.
- Save and close the page.

Initialize Equalise Differentiate based on duration **Save** close

Parent : Test Project

Number of Children : 2

SN	WBS Code : Name	Duration	Weight(%)
1	01 : STEP	8	70.0
2	02 : Task3	1	30.0

- Click on Weight Setting button for the child Step.

Project Name : Test Project

No.	Task Name	
1	Test Project	WEIGHT SETTING
2	01: STEP	<b>WEIGHT SETTING</b>
3	0101: Task1	LINK OUTPUT PRECEDENCE ASSIGN engineer SubProject
4	01102: Task2	LINK OUTPUT PRECEDENCE ASSIGN engineer SubProject
5	02: Task3	LINK OUTPUT PRECEDENCE ASSIGN engineer SubProject

- Set the Weight for Task1 and Task2.

Initialize Equalise Differentiate based on duration **Save** close

Parent : STEP

Number of Children : 2

SN	WBS Code : Name	Duration	Weight(%)
1	0101 : Task1	8	80.0
2	01102 : Task2	1	20.0

- Save and close the page.

- Click on Assign Engineer button for Task1 and assign engi1 to it. Also enter the Rate value for the user.

Project Name : Test Project

No.	Task Name	
1	Test Project	WEIGHT SETTING
2	01: STEP	WEIGHT SETTING
3	0101: Task1	LINK OUTPUT PRECEDENCE <b>ASSIGN ENGINEER</b> SubProject
4	01102: Task2	LINK OUTPUT PRECEDENCE <b>ASSIGN ENGINEER</b> SubProject
5	02: Task3	LINK OUTPUT PRECEDENCE <b>ASSIGN ENGINEER</b> SubProject

**Assign Engineer -- Web Page Dialog**

Assign Engineer  
Smart Project>User Project>Plan Schedule>Assign Engineer

Change Rate Save Cancel

**Task 1**

Project Participants :

Login	Name	Title	Dept	Rem
admin	PLM Database,			
engi1	, Engineer			
desi1	, Designer			

Responsible Engineer :

Login	Name	Title	Dept	participation
<input checked="" type="checkbox"/> engi1	, Engineer			100

**Ratio Change -- Web Page Dialog**

Ratio Change  
Smart Project>User Project>Plan Schedule>Ratio Change

100

- Similarly Assign Engineer engi1 for Task2 and desi1 for Task3.

**Assign Engineer -- Web Page Dialog**

Assign Engineer  
Smart Project>User Project>Plan Schedule>Assign Engineer

Change Rate Save Cancel

**Task 2**

Project Participants :

Login	Name	Title	Dept	Rem
admin	PLM Database,			
engi1	, Engineer			
desi1	, Designer			

Responsible Engineer :

Login	Name	Title	Dept	participation
<input checked="" type="checkbox"/> engi1	, Engineer			100

**Assign Engineer -- Web Page Dialog**

Assign Engineer  
Smart Project>User Project>Plan Schedule>Assign Engineer

Change Rate Save Cancel

**Task 3**

Project Participants :

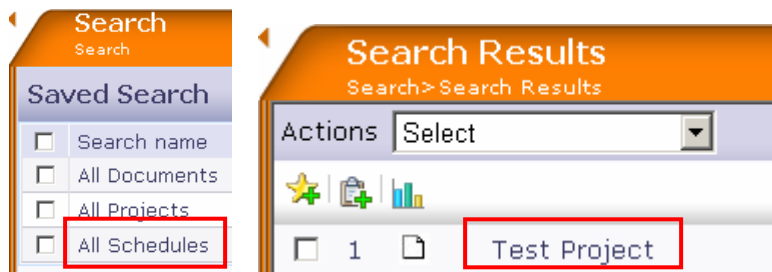
Login	Name	Title	Dept	Rem
admin	PLM Database,			
engi1	, Engineer			
desi1	, Designer			

Responsible Engineer :

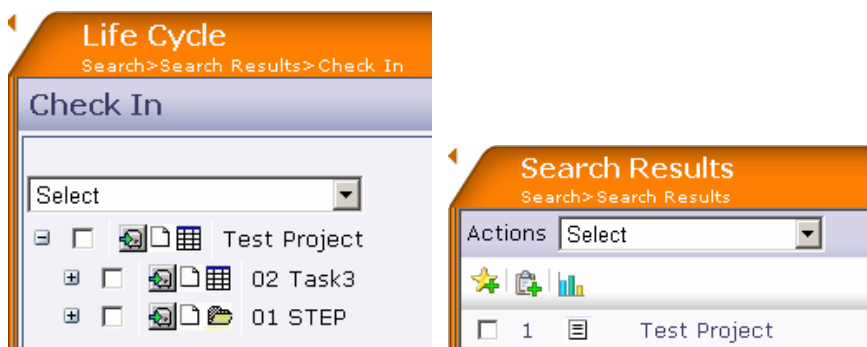
Login	Name	Title	Dept	participation
<input checked="" type="checkbox"/> desi1	, Designer			100



7. Search for **All Schedules** and select **Test Project** Schedule from the list.

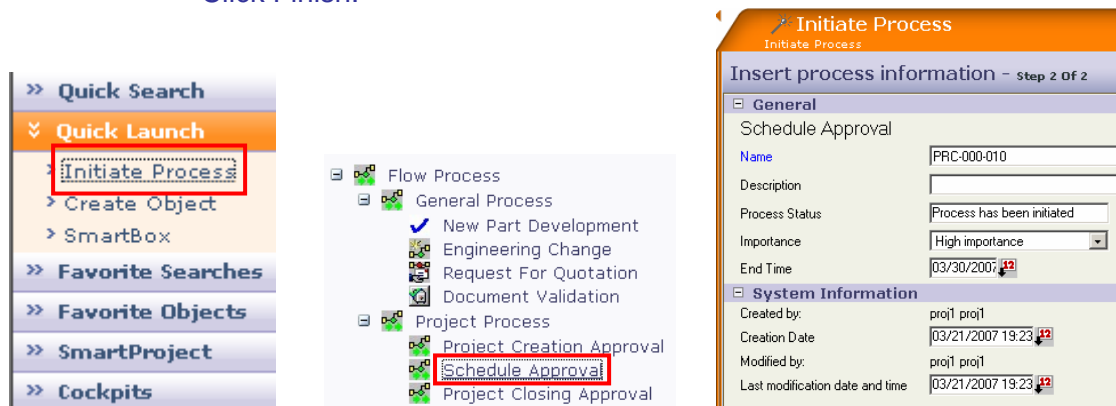


- Perform Check In operation on it and validate it with Run.

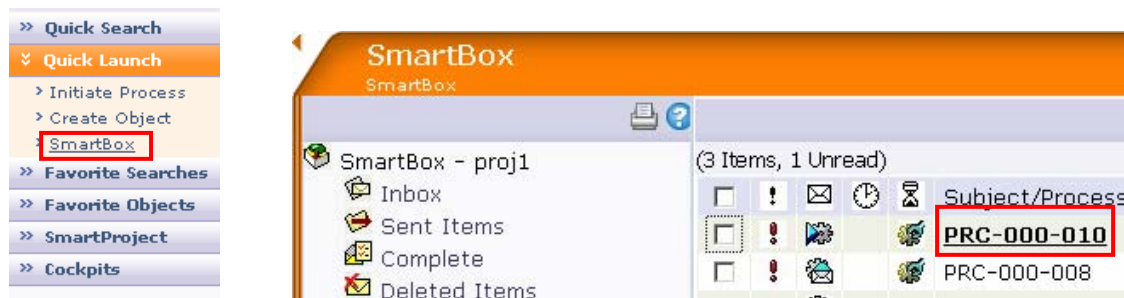


8. Click on **Initiate Process** from **Quick Launch** toolbar and start a **Schedule Approval** process to confirm the **Project Definition** from the assignees.

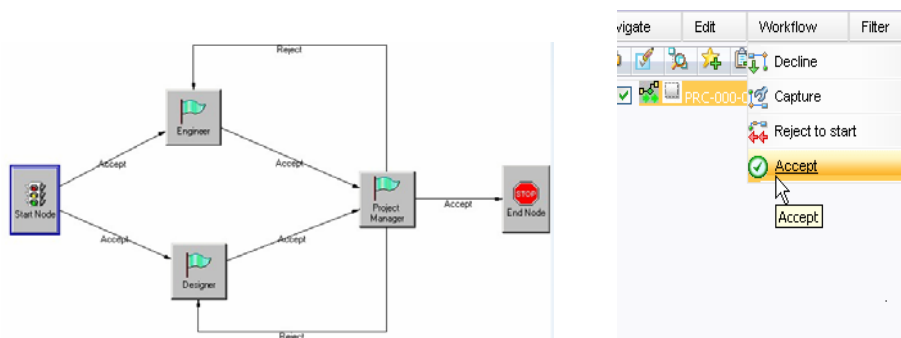
- Fill the Importance field as High Importance.
- Enter the End Time Date.
- Click Finish.



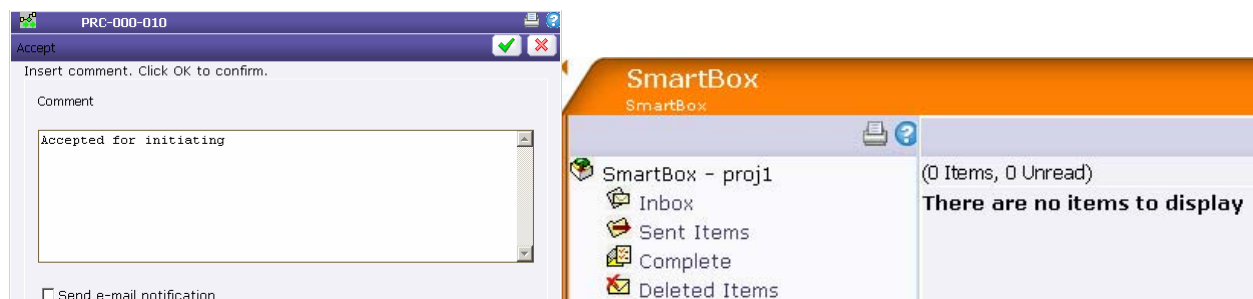
9. Click on **SmartBox** from **Quick Launch** toolbar and select the process in Inbox.



- Switch to Flow Chart tab and view it.
- Perform Accept Action on it.



- Enter some comments and validate with ok.
- Check the Inbox. No process will be displayed for admin user.



10. Click **Logout**.

11. Log in as **engi1** and connect to the correct database.

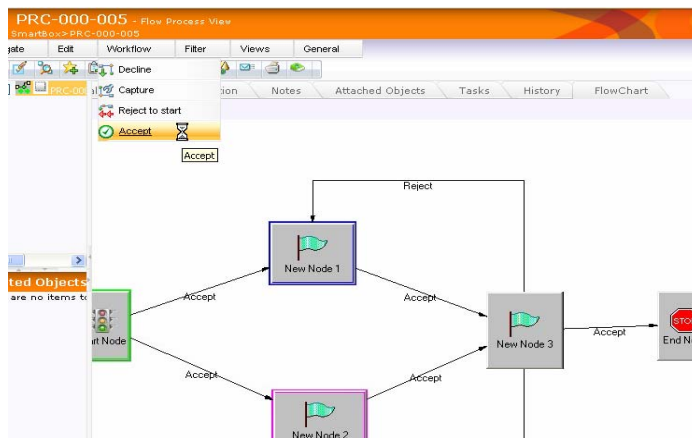


12. Click on **SmartBox** from **Quick Launch** toolbar and select the process in Inbox

- Switch to Flow Chart tab and view it.



- Perform Accept Action on it.



- Enter some comments and validate with ok.
- Check the Inbox. No process will be displayed for admin user.

13. Click **Logout**.

14. Log in as **desi1** and connect to the correct database.

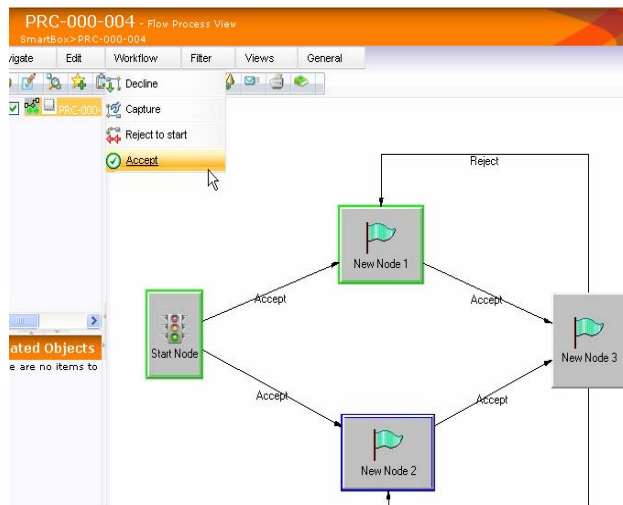


15. Click on **SmartBox** from **Quick Launch** toolbar and select the process in Inbox

- Switch to Flow Chart tab and view it.



- Perform Accept Action on it.



- Enter some comments and validate with ok.
- Check the Inbox. No process will be displayed for admin user.

16. Click **Logout**.

17. Log in as **proj1** and connect to the correct database.

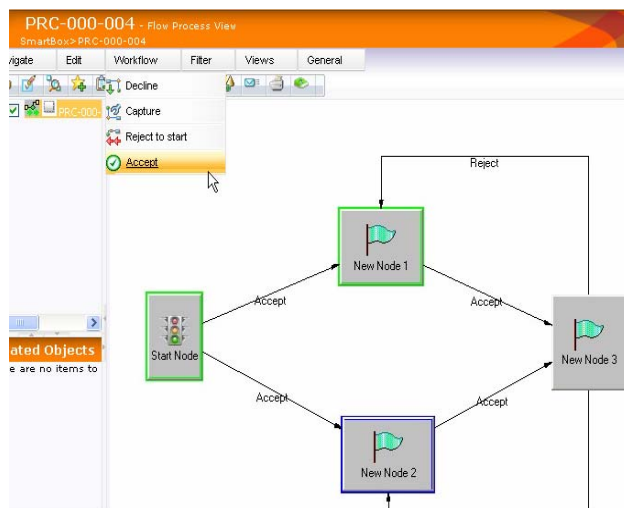


18. Click on **SmartBox** from **Quick Launch** toolbar and select the process in Inbox

- Switch to Flow Chart tab and view it.



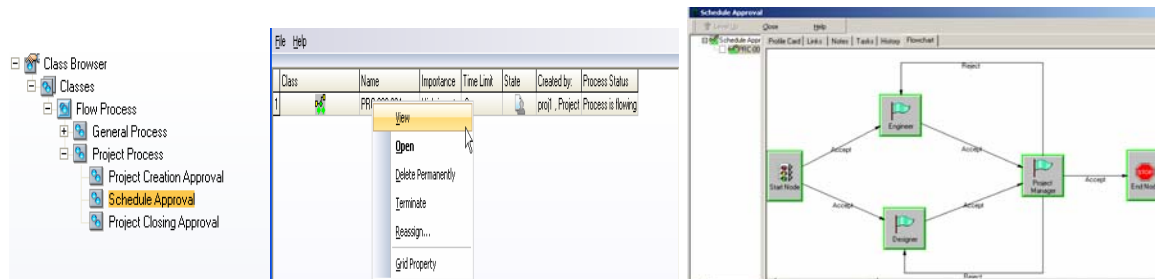
- Perform Accept Action on it.



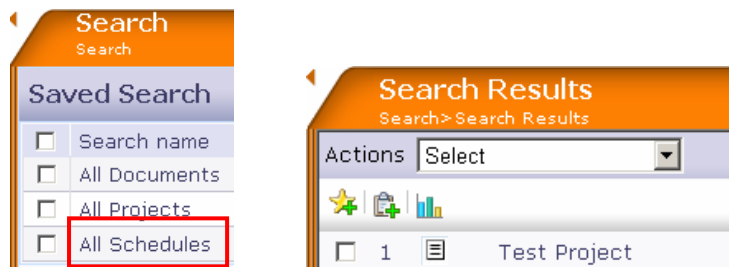
- Enter some comments and validate with ok.
- Check the Inbox. No process will be displayed for admin user.

19. Launch **Workflow Manager** to view the progress of the process.

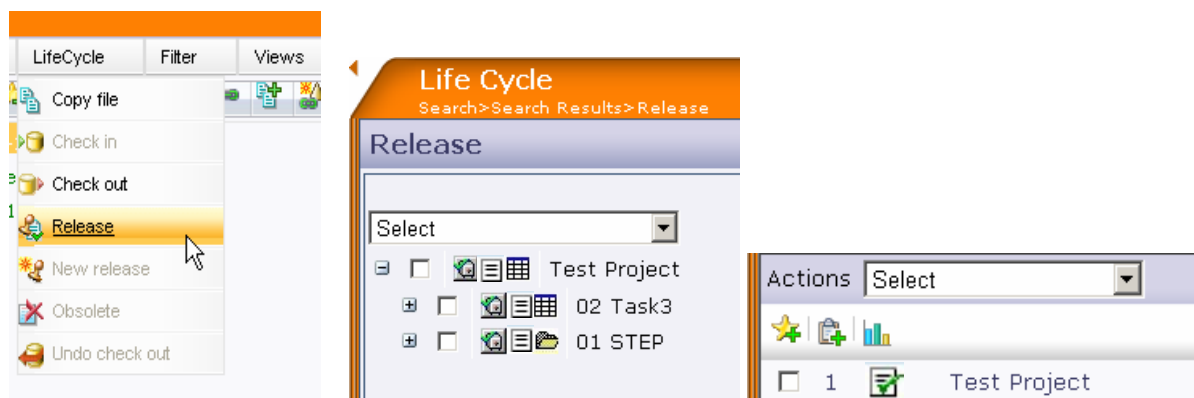
- Search for Schedule Approval process and view it.
- All the nodes are displayed as completed.
- Close the Workflow Manager.



20. Search for **All Schedules** and select Check In **Test Project** Schedule from the list.



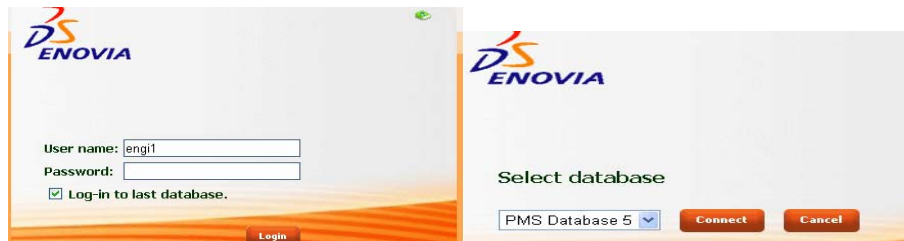
- Perform Release operation on it and validate it with Run.



21. Click **Logout**.

### 3.1.3 Phase 3: Project Execution

1. Log in as **engi1** and connect to the correct database.



The screenshot shows the ENOVIA login interface. On the left, there is a login form with fields for 'User name' (containing 'engi1') and 'Password'. Below these fields is a checkbox labeled 'Log-in to last database.' and a 'Login' button. On the right, there is a 'Select database' section with a dropdown menu showing 'PMS Database 5' and 'Connect' and 'Cancel' buttons.

2. Click on **My Tasks** from the **SmartProject User application bar**.  
Using this page the engineer is able to view today's task, Current Week Task, Unfinished and All tasks assigned to engi1.



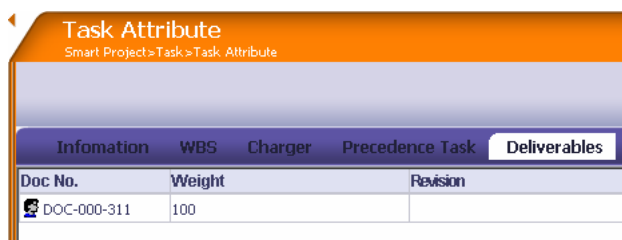
The screenshot shows the 'Task' management interface. At the top, it says 'Task Smart Project>Task'. Below this, there is a date 'Thursday, June 19, 2008' and a user profile 'admin'. There are four tabs: 'View Today's tasks', 'View This week's tasks', 'Unfinished Tasks', and 'All Tasks'. Below the tabs is a table with columns: 'Status', 'Schedule Name', 'WBS Code', 'Task Name', 'Progress Ratio', 'Actual Start Date', 'Actual End Date', 'Participation Ratio', 'Duration', 'Plan Start Date', and 'Plan End Date'.

- Select Task1 of Test Project.
- Enter the Actual Start Date.
- Click Save,



The screenshot shows the 'Task' management interface with a date picker. On the left, there is a 'SmartProject' sidebar with links: 'My Tasks', 'My Projects', 'Work Calendar', 'User Search', 'Project Search', and 'Project Status'. The main area shows the date 'Thursday, March 22, 2007' and a user profile 'engi1'. There are two tabs: 'View not completed tasks' and 'View all tasks'. Below the tabs is a table with columns: 'WBS Code', 'Task Name', 'Status', 'Progress Ratio', and 'Actual Start Date'. The table shows two tasks: 'Task 1' (WBS Code 0101, Status Not Started) and 'Task 2' (WBS Code 0102, Status Not Started). A 'DatePicker - Web Page Dialog' is open, showing a calendar for March 2007.

- Double click on the Task1 and navigate to Deliverable Tab.

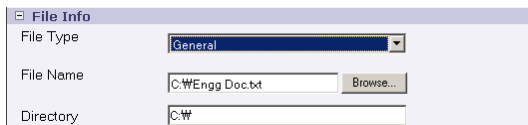


The screenshot shows the 'Task Attribute' interface. At the top, it says 'Task Attribute Smart Project>Task>Task Attribute'. Below this, there are four tabs: 'Information', 'WBS', 'Charger', 'Precedence Task', and 'Deliverables'. The 'Deliverables' tab is selected. Below the tabs is a table with columns: 'Doc No.', 'Weight', and 'Revision'. The table shows one row: 'DOC-000-311' with a weight of '100'.

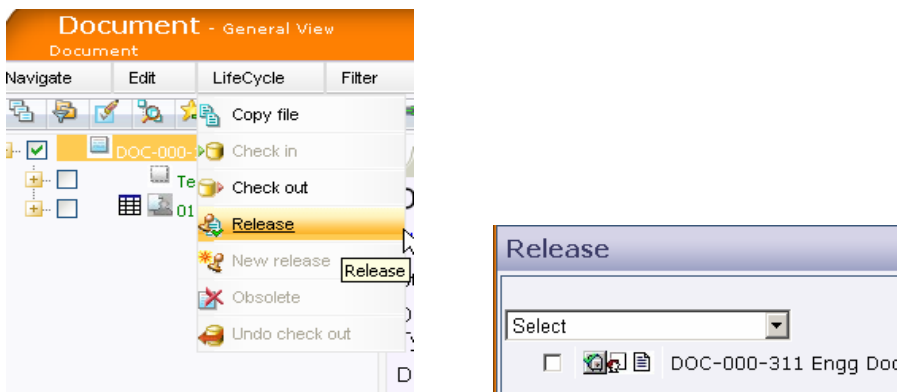
- Double click on the Document to view its profile card. Update it to attach a file to it through File browser.



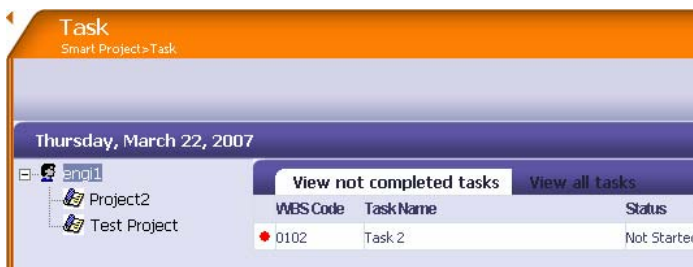
- Enter the File Type and validate ok.



- Perform Release operation on it and go back to view My Tasks.



- Upon release, the task progression is automatically updated to 100% and Task1 gets removed from the Task list.





- Double click on the Task2 and navigate to Precedence Task and check if its precedence task is completed or not.

Task Attribute						
Smart Project » Task » Task Attribute						
Information	WBS	Charger	Precedence Task	Deliverables		
Task ID	Task Name	Precedence Info	Plan Start Date	Plan End Date	Duration	Progress Ratio
PM5-001-178	Task 1	F5	2006-11-27	2006-11-28	2	0

- Go back to Task2 and enter the Actual Start Date.
- After performing the assigned task, enter Progress Ratio manually as there is no deliverable to be attached.

View not completed tasks						
WBS Code	Task Name	Status	Progress Ratio	Actual Start Date	Actual End Date	Participation
0102	Task 2	Not Started	0			100

- Save Task2 and check that no Tasks are now assigned for engi1.

View not completed tasks						
WBS Code	Task Name	Status	Progress Ratio			
0102	Task 2	Not Started	100			

- Click **Logout**.

3. Log in as **desi1** and connect to the correct database.

**DS ENOVIA**

User name:

Password:

☒ Log-in to last database.

**Login**

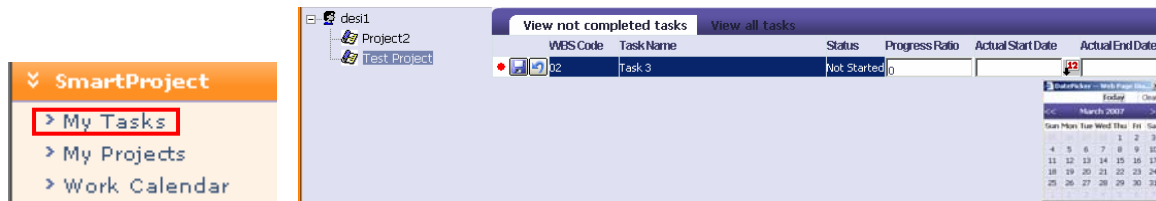
**DS ENOVIA**

Select database

**Connect** **Cancel**

4. Click on **My Tasks** from the **SmartProject User** application bar.

- Select Task3 of Test Project.
- Enter the Actual Start Date.
- Click Save.



- Double click on the Task3 and navigate to Precedence Task first to check the completion of preceding task and then switch to Deliverable Tab.

Information	WBS	Charger	Precedence Task	Deliverables
Task ID	Task Name	Precedence Info	Plan Start Date	Plan End Date
PMS-001-178	Task 1	F5	2006-11-27	2006-12-01

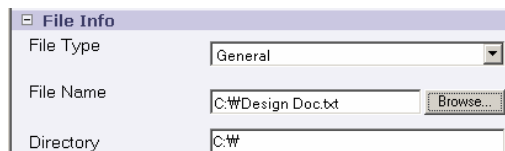
  

Information	WBS	Charger	Precedence Task	Deliverables
Doc No.	Weight	Revision		
DOC-000-313	100			

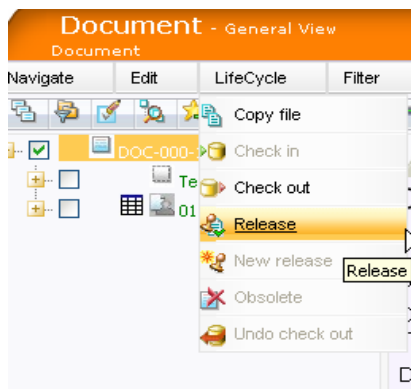
- Double click on the Document to view its profile card. Update it to attach a file to it through File browser.



- Enter the File Type and validate ok.

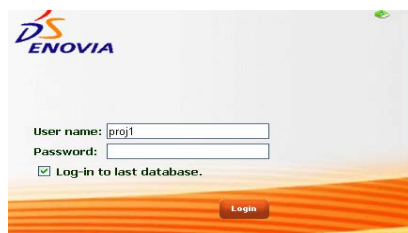


- Perform Release operation on it and go back to view My Tasks.



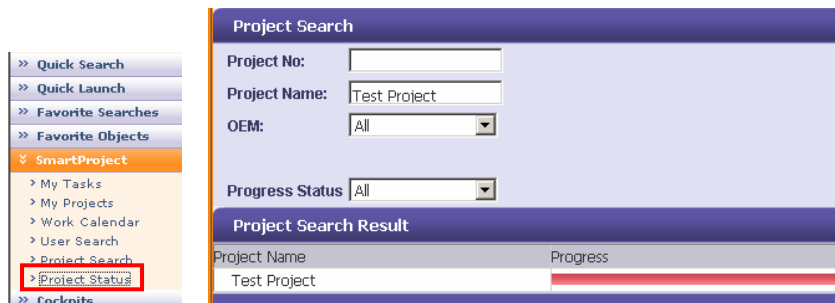
- Upon release, the task progression is automatically updated to 100% and Task3 gets removed from the Task list.
- Click **Logout**.

5. Log in as **proj1** and connect to the correct database.



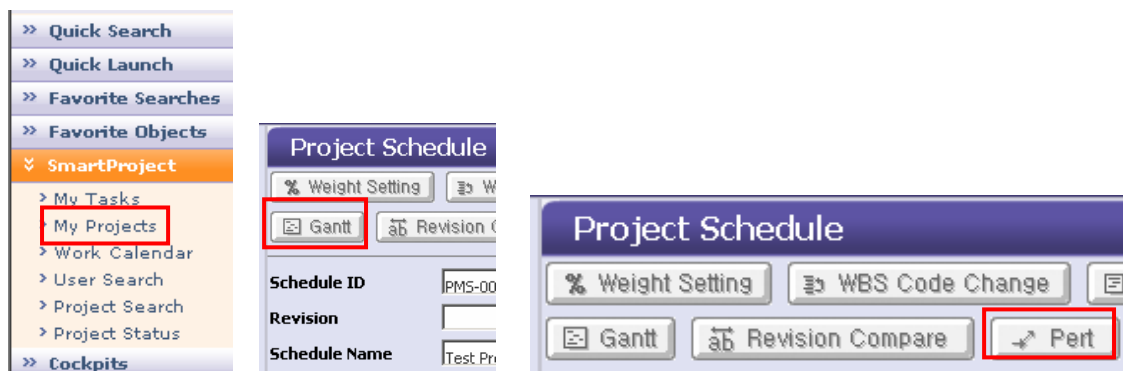
6. Click on **Project Status** from the **SmartProject User application bar**.

- Enter the search criteria for the Project to view.
- Click Find and view the progress of the Project.

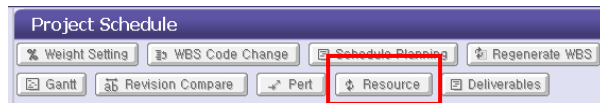


7. Click on **My Projects** from the **SmartProject User application bar**.

- Click Gantt chart and Pert chart to view the WBS.

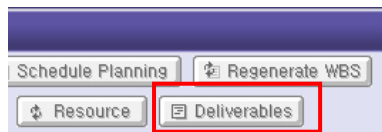


- Click on Resource to view the Workload.



User Name	User ID	Division	Title	2006
Engineer	engi1			11
Designer	desi1			
Sum				0.20

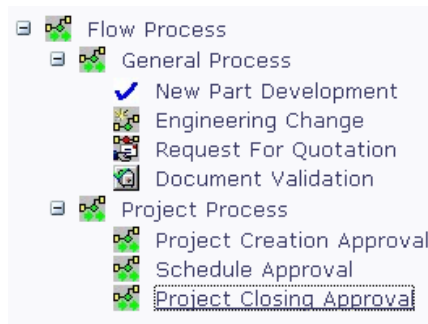
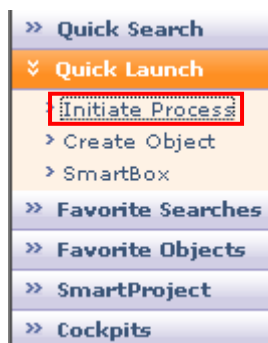
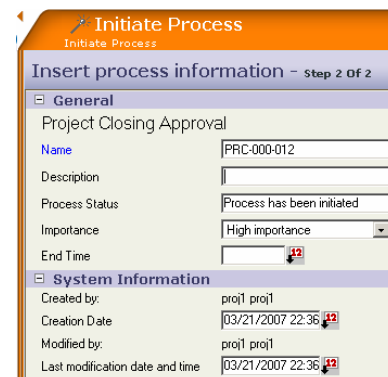
- Click on Deliverables to view its status.



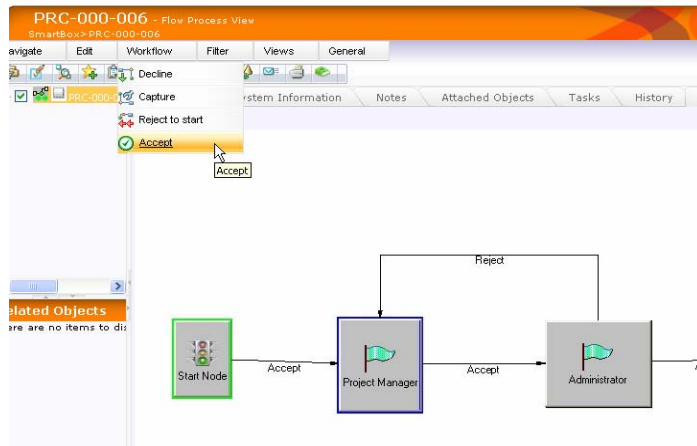
No.	Task Name	Output ID	Output No	Output Name
000	STEP 1			
001	Task 1	DOC-000-311	DOC-000-311	Engg Doc
002	Task 2	DOC-000-312	DOC-000-312	Test Project Document
003	Task 3	DOC-000-313	DOC-000-313	Design Doc

### 3.1.4 Phase 4: Project Release

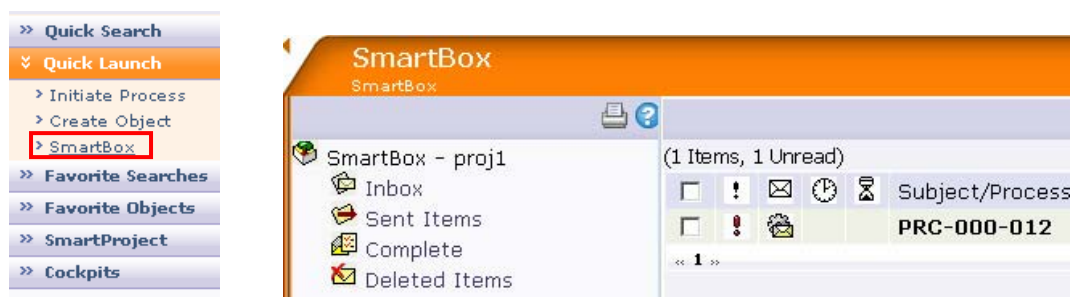
- After confirming the Project Completion, click on **Initiate Process** from **Quick Launch** toolbar and start a **Project Closing Approval** process to approve the **Project Release** from the decision makers.
  - Fill the Importance field as High Importance.
  - Enter the End Time Date.
  - Click Finish.

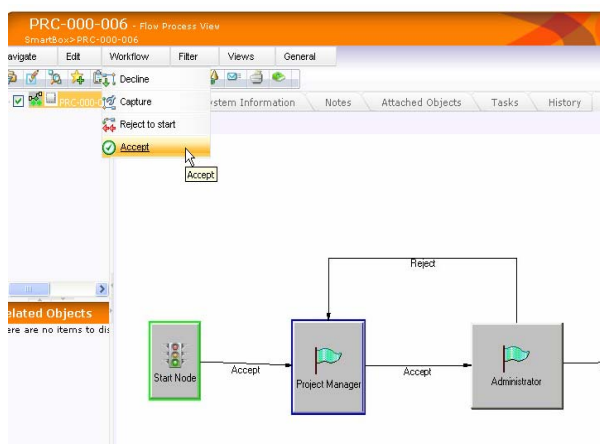
- Accept the start of the Flowchart and validate with ok.



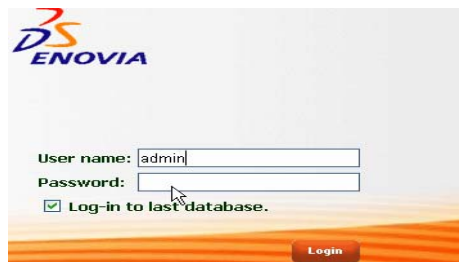
2. Click on **SmartBox** from **Quick Launch** toolbar and select the process in Inbox.



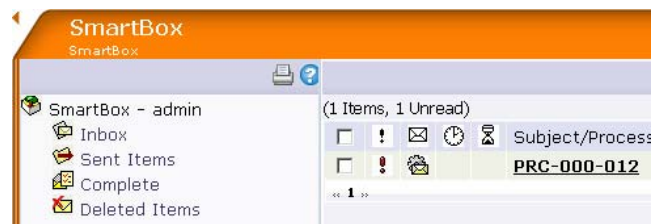
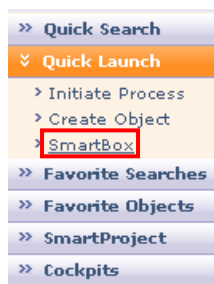
- Switch to Flow Chart tab and view it.
- Perform Accept Action on it and validate with ok.



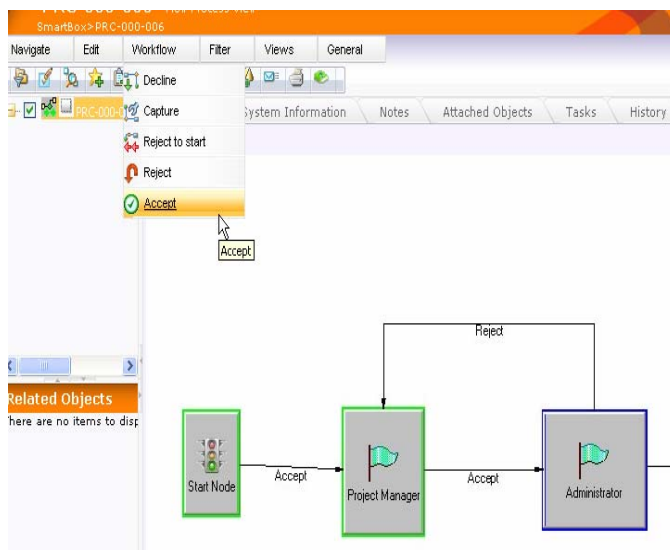
3. Click **Logout**.
4. Log in as **admin** and connect to the correct database.



5. Click on **SmartBox** from **Quick Launch** toolbar and select the process in Inbox.



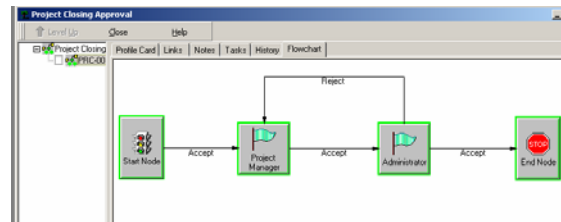
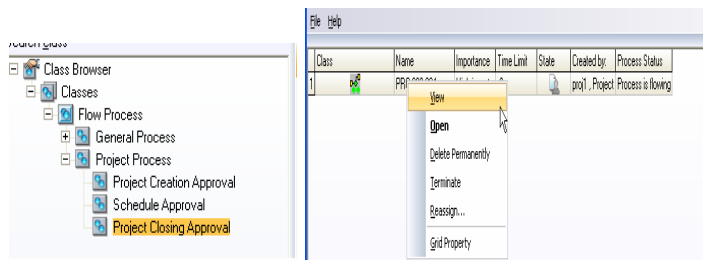
- Switch to Flow Chart tab and view it.
- Perform Accept Action on it and validate with ok.



6. Click **Logout**.

7. Launch **Workflow Manager** to view the progress of the process.

- Search for Project Closing Approval process and view it.
- All the nodes are displayed as completed.
- Close the Workflow Manager.



After workflow is completed, the Project Manager can close the Project.