



LECTRA FASHION PLM

200 – Calendar Management Process Manual

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Contents

Conventions	6
1. Uses of Calendar Manager	6
2. Basic principles	6
3. Task list	8
4. Managing Company calendars	9
4.1 Accessing the Calendar Manager	9
4.2 Creating a calendar	9
4.3 Modifying a calendar	10
5. Managing processes	11
5.1 Definitions.....	11
5.1.1 Process.....	11
5.1.2 Lifecycle state	11
5.1.3 Tasks	11
5.1.4 Resources/Rights	12
5.2 Accessing the process manager	12
5.3 Viewing a process	12
5.4 Creating a new process.....	13
5.4.1 To associate a calendar to the process.....	13
5.5 Modifying a process	14
5.5.1 To modify the different values	14
5.5.2 To modify the position of a step.....	14
5.5.3 To delete a step	14
5.6 Making a process available.....	15
5.7 Creating a new process from an existing one.....	15
5.8 Searching for a process	15
6. Associating processes to product subsets.....	17
6.1 Associating processes from the subsets explorer.....	17
6.1 Associating processes from the Time & Actions tab.....	18
6.2 Changing the current process	18
7. Scheduling product subsets	19
7.1 Launching scheduling.....	19
7.2 Restarting scheduling.....	20
7.3 The different scheduling statuses	20
8. Multi-criteria search	21
9. Tracking product subsets	22

9.1	Interpreting the graphic indicators.....	22
9.2	Subsets explorer - Viewing schedule data.....	22
9.2.1	Configuring the Subsets explorer view.....	22
9.2.2	Tracking progress in the Subsets explorer.....	23
9.3	Time & Actions tab - Viewing schedule data.....	24
9.4	To Do List - Viewing schedule data.....	25
9.4.1	Configuring the My To Do List display.....	26
10.	Freezing a baseline	28
10.1	Freezing a baseline.....	28
10.2	Creating a report on a particular schedule.....	28
11.	Adjusting the schedule / Validating steps	30
11.1	Batch editing in the Subset explorer.....	30
11.1.1	To adjust the duration of certain steps and reallocate resources.....	30
11.1.2	To bypass tasks.....	31
11.1.3	To change the status of a step in the Subsets explorer.....	31
11.1.4	To apply constraint dates to steps.....	32
11.1.5	To change the calendar associated to one or more schedules.....	34
11.1.6	To change the calendar associated to one or more steps.....	34
11.2	Editing a subset on the Time & Actions tab.....	34
11.2.1	To change the process and/or modify the various project dates.....	35
11.2.2	To adjust the durations of certain steps, reallocate the resources and bypass a task.....	35
11.2.3	To change the status of a step on the Time & Actions tab.....	36
11.2.4	To put a schedule on hold / To resume a schedule on the Time & Actions tab.....	37
11.2.5	To apply constraint dates to steps.....	38
11.2.6	To modify the calendar associated to a schedule.....	44
11.2.7	To modify the calendar associated to a schedule step.....	44
11.3	Editing in My To Do List.....	45
11.3.1	To modify the status of a step in My To Do List.....	45
12.	Receiving email notifications.....	47
13.	Excel exports of the data associated with the schedules.....	48
14.	Graphics Charter	49
14.1	My To Do List.....	49
14.1.1	Concepts.....	49
14.1.2	Statuses.....	49
14.1.3	Views.....	49
14.1	Subset explorer.....	50
14.1.1	Concepts.....	50
14.1.2	Icons.....	50
14.1.3	Summary view.....	50
14.1.4	Condensed and expanded views of columns.....	51
14.2	Time & Actions.....	52
14.2.1	Concepts.....	52

14.2.2 Illustration	53
14.2.3 Navigation bar.....	53
14.3 Tables.....	53
15. Glossary	54

This Process Manual is designed to both assist in the training of operators of the Lectra Fashion PLM product, and to act as a reference manual for the product. When combined with other Process Manuals, it forms part of the User Role Manuals.



Modifications made to the document since its last publication are highlighted in blue.

CONVENTIONS

PLM	= Product Lifecycle Management Solution
Product development module	= Product Developer
Collection planning module	= Collection Planner
Calendar scheduling module	= Calendar Manager
Administration and configuration management software	= PLM Manager

1. USES OF CALENDAR MANAGER

- Controlling product development (styles, fabric, trims, etc.) over time and performing real-time monitoring.
- Sharing an overview of the progress of a set of products (lifecycle states and sets of tasks understood by everyone).
- Having an overview of a set of products and searching in the schedules of these products. Quickly identifying which products have been scheduled and which have not. Quickly identifying steps that are complete, overdue or on time.
- Scheduling product subsets (color groups, multiple suppliers, etc.) with different target dates and/or processes.
- Alerting each user to the activities that concern them, giving timescales and priorities.
- Modifying schedule data (dates, durations, resource allocations, changes in objectives for products) at any time during development with schedules being immediately updated.
- Allocating activities to resources.

2. BASIC PRINCIPLES

- The processes defined describe the product lifecycle, following a sequence of steps.
- The lifecycle states are sequential, though tasks can be performed later or earlier.
- A task can be:
 - validated at any time
 - bypassed (to prevent blockages or because the task is no longer needed for the development of a product)
- The validation date may be different from the current day's date: tasks can be validated giving a date in the past.

- Changes are very easy to manage:
 - Dates (start date or finish date), durations and resources can be modified at any time by any authorized user.
 - Products can be put on hold at any time during development, and can be restarted or canceled later.
- The company calendar lets you distinguish between working days and non-working days. Several company calendars can be managed.
- Scheduling can also be done in backward or forward scheduling mode (i.e. based on start date or finish date).

3. TASK LIST

- Create basic processes
- Identify the subsets to be scheduled
- Associate them with a process
- Launch forward or backward scheduling
- Adjust schedules at any time (durations, resources, schedule start or finish dates, constraint dates etc.) to reflect priorities
- Validate/invalidate the different steps as they are performed
- Freeze baselines
- Change the processes in ongoing schedules

4. MANAGING COMPANY CALENDARS


Because the schedule for a product takes account of the days that are working days in the company and the days that are not, it is important to check that the company calendar is correctly filled in.

Several company calendars can be created.






Each process is globally associated to a specific calendar. A different calendar can be affected to each step of the process.

When planning a subset, the calendar associated by default is taken into account to calculate dates; it is however possible to change calendar.




4.1 Accessing the Calendar Manager

Click on the **Administration** tab, then select  **Company Calendars**.

The window that appears lets you view and modify calendars created previously, and create new ones.

	Create	Display a blank calendar for creation
	Edit	Display the selected calendar in edit mode
	View	Display the selected calendar in view mode  You can also click on the calendar name (hypertext)
		Indicates the default calendar: the one that will automatically be associated to the process when planning a subset.

4.2 Creating a calendar

1. Click on .
2. Enter the **Name** of the calendar (unique name).
3. You can indicate if you want this calendar to be the **Default** one  . In that case, this calendar will automatically be selected when creating a process.
4. **Define the working and non-working days:**
Select a date (or multiple dates),
 - directly in the calendar grid (press and hold down the **CTRL** key for a multi-selection)
 - and/or using the **Day Selection Help**.





Day Selection Help:

Mass selection possible on a given time period:


- In the left pane, define the time period during which days are to be selected.
- Click on one or more weekdays to select all these days over the time period.
(perfect solution to select weeks for example)
- You can also select one or more specific day(s) that will be selected over the time period
(perfect solution to select fixed holydays)

Then click on:

-  **Make Workday** to declare these days as working days
-  **Make Non-Workday** to declare these days as non-working days

5. Save.

4.3 Modifying a calendar

1. Click on the name of the calendar to be modified, then click on .
2. Make the necessary changes using the same procedure as for creation ([see above: Creating a calendar](#)).
3. Save.

5. MANAGING PROCESSES

5.1 Definitions

5.1.1 Process

A process describes in sequence a set of actions that have to be carried out to develop a product (styles, fabrics, trims, etc.). These logical tasks are accompanied by schedule data and allocated resources.

The process tells you:

- The **Name** of the process
- The development steps, as well as their duration and the resources allocated to them:
 - the **Lifecycle States** and any **Tasks** that determine the actions to be performed to develop a product
It is possible to specify whether certain tasks will have to be redone.
 - the logical sequence of these steps (**Predecessor(s)**)
 - the estimated **Duration (Days)** of these steps
 - the **Resource(s)** allocated to each of these steps or the **Resource types** if the exact resource is not yet defined
 - the associated company **Calendar**

Processes can then be attached to one or more products to schedule their development.

5.1.2 Lifecycle state

Throughout its development, a product goes through different **Lifecycle States**. These states indicate the stage of development of a product.

A **Lifecycle State** can be validated if the tasks required for that lifecycle state have been performed.

5.1.3 Tasks

These are the tasks required for the development of a product.

Depending on the product and the process associated with it, tasks can be performed later or earlier.

Analyzing the tasks lets you know what has been done on a product.

The behavior of tasks can vary:

- **To redo:** indicates that a task will be automatically invalidated if it is required for a lifecycle state that has been invalidated.
- **Standard:** indicates that, once it has been validated, the task will no longer be required
- **Bypassed:** indicates that the task is not necessary for current development and can therefore be bypassed, or that the task is blocking the progress of an urgent process and it can be momentarily bypassed. A bypassed task is no longer counted in the date calculation.

5.1.4 Resources/Rights

Resource allocation

Resources are allocated to the different steps in a process. These resources are notified of the actions to be performed in their **To Do List**.

Resources are allocated either when a process is created or later on. In all cases, allocated resources can be modified.


Definition of rights

Resources are configurable by user profile. Read or edit rights over schedule data differ according to user profile.



To define users and their rights, please refer to the PLM Manager online help.

5.2 Accessing the process manager


Click on the **Administration** tab, then select  **Process management**.

The window that appears lets you view and modify processes created previously, and create new ones.

5.3 Viewing a process

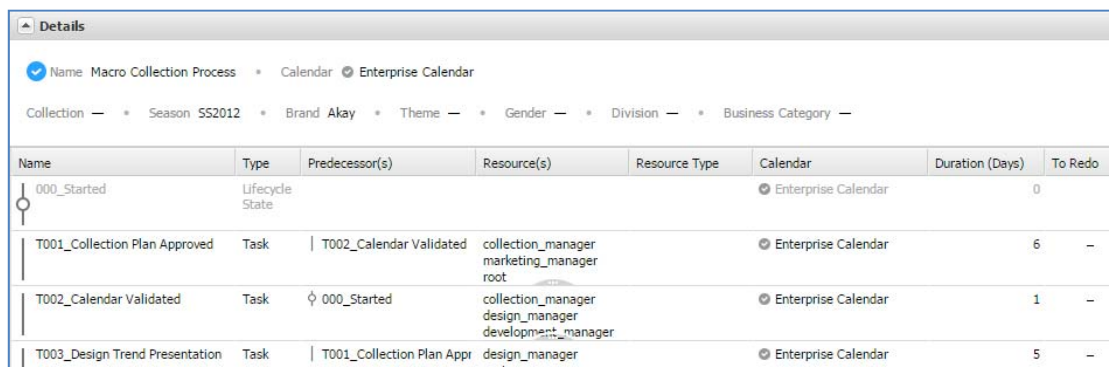
1. In the Process Manager, click on the process name in the **Process list** section.



Only **available** processes (identified by  in the process list) can be associated with product subsets.


2. The **Lifecycle States** and **Tasks** table appears.
 - The logical sequence of steps (lifecycle states and tasks) is indicated by means of **Predecessor(s)**.
 - Resource allocation details are given for each step.
A **Resource type** can be entered if the exact resource has not yet been defined.
 - The **Duration** of each step is specified.
 - The tasks **To redo** are identified.
 - The associated **Calendar** is indicated.

Example of a process:




Name	Type	Predecessor(s)	Resource(s)	Resource Type	Calendar	Duration (Days)	To Redo
000_Started	Lifecycle State				Enterprise Calendar	0	
T001_Collection Plan Approved	Task	T002_Calendar Validated	collection_manager marketing_manager root		Enterprise Calendar	6	-
T002_Calendar Validated	Task	000_Started	collection_manager design_manager development_manager		Enterprise Calendar	1	-
T003_Design Trend Presentation	Task	T001_Collection Plan Appr	design_manager root		Enterprise Calendar	5	-


5.4 Creating a new process

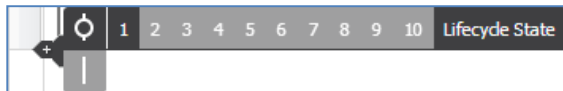
1. In the Process manager, click on  (**Create**).
2. Enter the **Name** of the process.




The lifecycle state **Initial** is created by default. This is mandatory and its duration cannot be changed. You can, however, rename it by double-clicking in the cell.

3. [Associate a calendar to the process.](#)
4. After the initial lifecycle state, insert other steps.
 - Position the mouse on the bottom row of the first column, then on the  symbol that appears.
 - You can then choose to insert one or more lifecycle states or tasks:

Hover over , then click on the number of lifecycle states that you want to insert in one go.



Hover over , then click on the number of tasks that you want to insert in one go.



5. Repeat this step as many times as necessary.
6. For each step created:
 - The **Name** is mandatory. It should also be used only once in a single process. Double-click in the **Name** cell and enter a name or choose one from the list.
 - The **Duration** should be entered. Double-click in the **Duration (Days)** cell and enter a number or choose one from the list.
 - Resources can be allocated to the different steps, but they are not mandatory. If a resource is not yet known when the process is created, a **Resource type** can be entered until it is known who the step will be allocated to.



To define users, please refer to the PLM Manager online help.

- You can indicate whether each task is **To redo** or not if the process is wound backwards.
 - If needed, associate a calendar to each step.
7. For a process to be coherent, it must end with a Lifecycle State.
 8. Once a process has been created, it can be made **Available**. (See [Making a process available](#))
 9. Save.


5.4.1 To associate a calendar to the process

Each process must be associated to a company calendar. The schedule of a product following this process will take the associated calendar into account.

Once the calendar is chosen globally at the process level, all the process steps will also follow this very calendar unless a specific calendar is defined for each step.

1. **Associate a calendar to the process:**

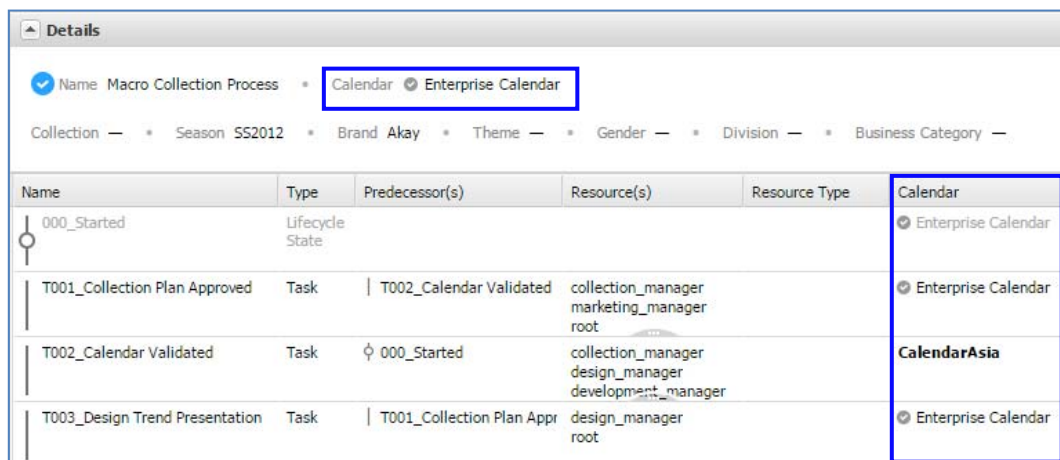
In **Calendar**, select in the list the one to associate to the process.
All the process steps are automatically associated to this calendar.

 The **Default** calendar is automatically associated; a different one can be selected.

2. **If needed, associate a specific calendar to some steps:**


Each step can have its own calendar.
Double-click in the **Calendar** cell of the step to be modified.
In the list of available calendars, select the one to be associated to the step.

E.g.:



Name	Type	Predecessor(s)	Resource(s)	Resource Type	Calendar
000_Started	Lifecycle State				<input checked="" type="radio"/> Enterprise Calendar
T001_Collection Plan Approved	Task	T002_Calendar Validated	collection_manager marketing_manager root		<input checked="" type="radio"/> Enterprise Calendar
T002_Calendar Validated	Task	000_Started	collection_manager design_manager development_manager		CalendarAsia
T003_Design Trend Presentation	Task	T001_Collection Plan Appr	design_manager root		<input checked="" type="radio"/> Enterprise Calendar


5.5 Modifying a process

- In the Process Manager, click on the name of the process to be modified, then click on  (**Edit**).
- Make the necessary changes using the same procedure as for creation ([see above: Creating a new process](#)).
- Save.

5.5.1 To modify the different values

Double-click in the cell containing the value to be modified and select or enter a new value.

5.5.2 To modify the position of a step

Position the mouse in the first column until the grab icon  appears.
Press and hold the left mouse button and drag to the desired location.

5.5.3 To delete a step

Select the step to be deleted, then click on .

5.6 Making a process available

When you **create** or **edit** a process, you can make it available so that it can then be associated with a product.

To make a process available, click on the **Available** toggle button.

Process available



Process unavailable



The process must be coherent to be available. Several conditions must be met for a process to be coherent:

- There must be a start and finish lifecycle state.
- There must be a predecessor for each step (except for the initial lifecycle state).
- Lifecycle states must not be in parallel.
- There must not be any loops in the process.

5.7 Creating a new process from an existing one

1. In the Process Manager, display the process that you are going to use as a template.

2. Click on  (**Save as**).

3. In the save box that displays, enter the name of the new process and confirm by pressing **OK**.



The name must be unique.

4. The new process has inherited all the data from the original process.

5. Make the necessary changes using the same procedure as for modifications ([see above: Modifying a process](#)).

5.8 Searching for a process

Searching for a process can rely on many description and classification criteria.



Please refer to the **Common Platform Functions** User Guide for more details about all the search functions and rules.

The **Description** criteria lets you search for processes based on their name, on the associated Calendar and on whether or not they are available














DESCRIPTION 	
Process Name	<input type="text"/>
Available	<input type="text"/> ▼
Calendar	<input type="text"/> ▼

Processes can also be searched for based on their classification criteria.

As more than one value can be selected for the same criteria, the **Search** applies itself to all the items that match with one of the selected values.



Classification values can be configured in the PLM Manager.

CLASSIFICATION 	
Collection	<input type="text"/>  
Seasons	<input type="text"/>  
Brand	<input type="text"/>  
Themes	<input type="text"/>  
Gender	<input type="text"/>  
Divisions	<input type="text"/>  
Business Categories	<input type="text"/>  

6. ASSOCIATING PROCESSES TO PRODUCT SUBSETS

To schedule the development of one or more subsets, you need to attach a process to them and then launch scheduling.



Only subsets with configurations that allow it (**With processes** defined in PLM Manager) can have a process associated to them. So only the subsets configured as **With processes** can be scheduled.

(Please refer to the PLM Manager online help for information about subset configuration).

Processes are associated either on the **Time & Actions** tab or in the subsets explorer.

If necessary, the associated process can be changed (see below, [Changing the current process template](#)).

Only processes that have been made **Available** will be shown (see [Making a process available](#)).

6.1 Associating processes from the subsets explorer

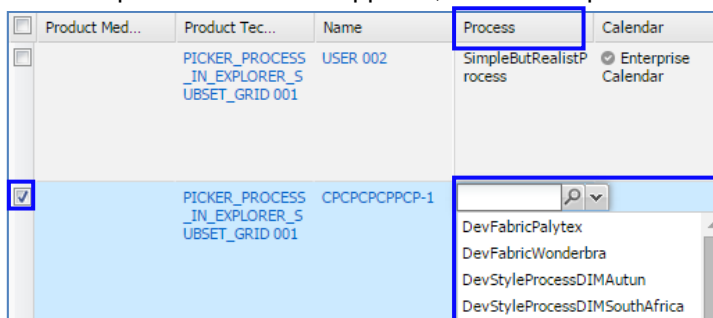
1. In the subsets explorer, search for the subset(s) with which you want to associate a process.

2. **For a single association:**

Select a subset.

Double-click in the cell of the corresponding subset in the **Process** column.

In the drop-down menu that appears, choose the process to associate.



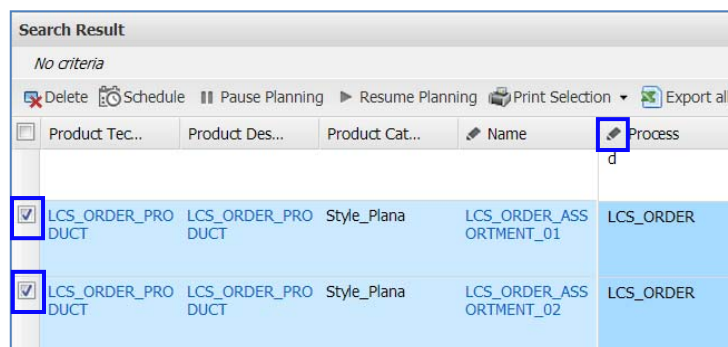
3. **For a multiple association:**

Select the subsets with which you want to associate a process.

In the header of the **Process** column, click on to edit the selected cells.

In the drop-down menu that appears, choose the process to associate.

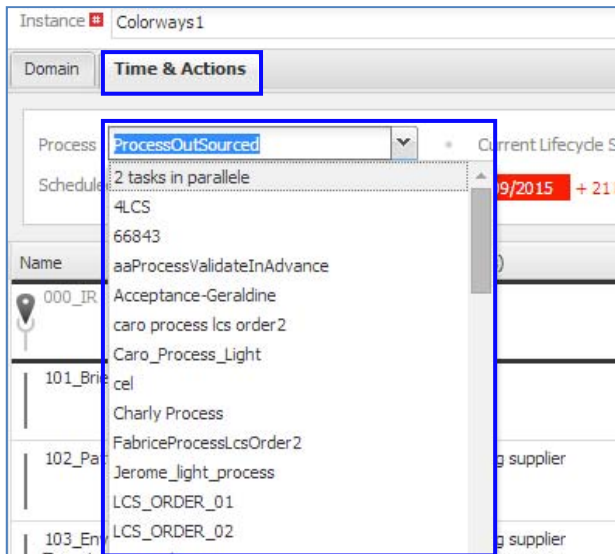
Click on **Replace**.



6.1 Associating processes from the Time & Actions tab

A process can be associated to a subset from the **Time & Actions** tab when the subset instance is created or later on.

1. Open the subset instance with which you want to associate a process.
OR
Create a new subset instance and name it.
2. On the **Time & Actions** tab, choose the process you want to associate from the drop-down list in the **Process** field.
3. Save.



6.2 Changing the current process

You can change the process associated with a subset. The procedure is identical to the one used to associate a process from the **Time & Actions** tab, described above. (See [Associating processes from the Time & Actions tab](#))



The progress of the steps in the old process is not kept when the process is changed. A warning message will appear to tell you this.



If the process is changed now, all previously created tasks and life cycle states will be lost. Do you really want to change the process?

The user must then restart the scheduling.

However, baselines will still be kept, even if you change the process.

7. SCHEDULING PRODUCT SUBSETS

Once a process has been associated to a subset, the forward or backward scheduling of this subset can take place.

The forward or backward scheduling of one or more subsets is done from the subset explorer window.

- **Forward scheduling** is calculated automatically based on the start date (**Scheduled Start**). If no start date is given, scheduling will be performed from the current day's date. (The **Scheduled Finish** date is calculated automatically based on the duration of all the tasks to be performed.)
- **Backward scheduling** is calculated automatically based on the finish date (**Scheduled Finish**). (The **Scheduled Start** date is calculated automatically based on the duration of all the tasks to be performed.)
- The **Forecast Finish** date is calculated automatically based on the current day's date and the longest estimated time to complete all the lifecycle states. This date constantly changes during development of the subset (e.g. when a task is overdue or is validated early).



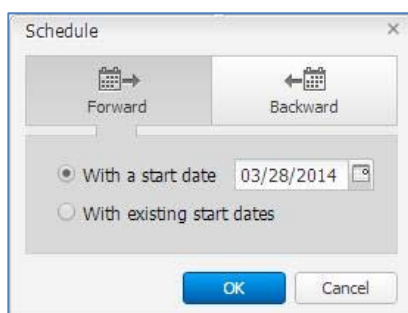
The schedule calculation takes account of tasks that have been validated already or bypassed, and any changes to the duration of the steps.


7.1 Launching scheduling

Scheduling can be performed on one or more subsets at a time. It can be done from the subsets explorer and from the **Time & Actions** window.

1. **From the subsets explorer**, search for the subset(s) for which you want to launch scheduling.
OR
From the Time & Actions window of a particular subset

2. Click on  **Schedule**.




3. Click on  to launch **forward scheduling** from a start date

OR

- Click on  to launch **backward scheduling** from a finish date.

4. Select a start date (the default start date is the current day's date) or a finish date for the schedule, depending on the chosen type of scheduling.

You can click on  to choose the current day's date.

5. Validate with **OK**.

7.2 Restarting scheduling

To restart scheduling, the procedure is similar to the initial scheduling (see [Launching scheduling](#) above).

Comments:

- You can choose to **Keep Current Start Date** or **Keep Current End Date** to keep the current schedule dates.
- In the event of rescheduling, validated steps are preserved, bypassed tasks remain bypassed, changes in duration are taken into account and the various dates are recalculated.

7.3 The different scheduling statuses

Once scheduling has been launched, there are several possible scheduling statuses. The **Planning Status** column indicates the status:

- **Planning Uptodate:** indicates that scheduling has been launched and the schedule has been calculated.
- **Planning in Progress:** indicates that scheduling has been launched and the schedule is in the process of being calculated.
- **Forecast in Progress:** indicates that the forecast dates are in the process of being calculated if there has been a change in duration, in the validation/invalidation of a step, or in a bypassed task.



It may be necessary to refresh the page to see the scheduling status change.

8. MULTI-CRITERIA SEARCH

Schedule data searching is very comprehensive and covers numerous scenarios.



Please refer to the **Common Platform Functions** User Guide for more details about all the search criteria.

Here we will look in detail at searching subsets based on scheduling criteria.

The **Time & Actions** criteria let you search for subsets based on their progress (lifecycle state, scheduling status: overdue or on hold), the different schedule dates, the associated process or calendar including whether or not they are scheduled/with or without alerts.

TIME & ACTIONS

Lifecycle State =

Scheduled Start From To

Scheduled Finish From To

Forecast Finish From To

Overdue Only

On Hold Only

Process

Scheduled Only

The criteria for searching for **Steps** let you search for steps (tasks or lifecycle states) based on their name, the resources allocated to them, their different scheduling dates, their status, how overdue they are, etc.

STEP

Name

Resource(s)

Scheduled Finish From To

Forecast Finish From To

Task

Lifecycle State

Validated By

Validation From To

Bypassed Task Only

Overdue Only



The tasks and lifecycle states in the search results are displayed in the **Step Search** column. Only steps that meet the search criteria are displayed.

9. TRACKING PRODUCT SUBSETS

Once development has started, Calendar Manager lets you view schedule progress, identify completed tasks, and identify any that are overdue.

Schedules are automatically updated every day.

- The **Subsets explorer** offers a **general overview** of all subsets. (See [Subsets explorer - Viewing schedule data](#))
- The **Time & Actions** tab offers a **detailed view** of each subset (See [Time & Actions tab - Viewing schedule data](#)).
- **My To Do List** is a reminder of the scheduled actions to be carried out for development. There is a condensed view of **My To Do List** on all screens, which can be expanded at any time. It is unique to each user (See [To Do List - Viewing schedule data](#)) and can be contextual.

9.1 Interpreting the graphic indicators




See the chapter on the [Graphics Charter \[Assortments explorer - Time & Actions - To Do List\]](#) to see what the different graphic indicators mean.

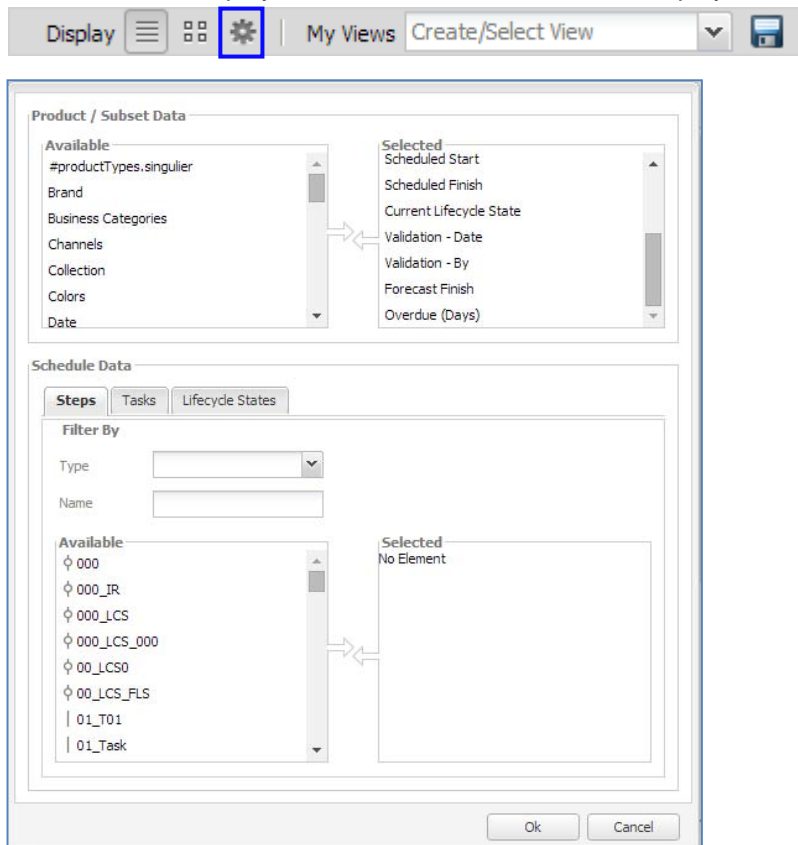
9.2 Subsets explorer - Viewing schedule data

9.2.1 Configuring the Subsets explorer view

The explorer view can be configured according to the schedule data that each user wants to see.

Selecting the data to display

Click on  to display the list of columns and data to display.



1. Select the **Product Data/Subsets** to display and drag them to the right-hand panel. You can also select by double-clicking.
2. Select the **Schedule Data** (Tasks/Lifecycle States) that you want to appear in the table. A filter can be applied to make searching easier. Drag them to the right-hand panel. You can also select by double-clicking.



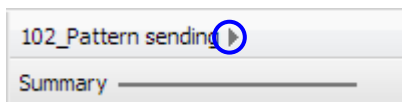
The display order of the selected data can also be changed. To do this, drag the data and drop it at the desired location in the list.

3. Confirm with **OK**.

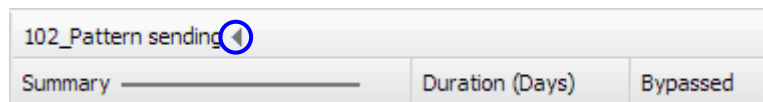
Columns on the bar


For any lifecycle state or task, you can choose the information to be displayed (see above).

The columns on the bar can be condensed or expanded depending on the desired level of detail. To do this, double-click in the column or on the condense/expand arrow. The summary column always remains visible.



In condensed mode, the **Summary** column always remains visible.



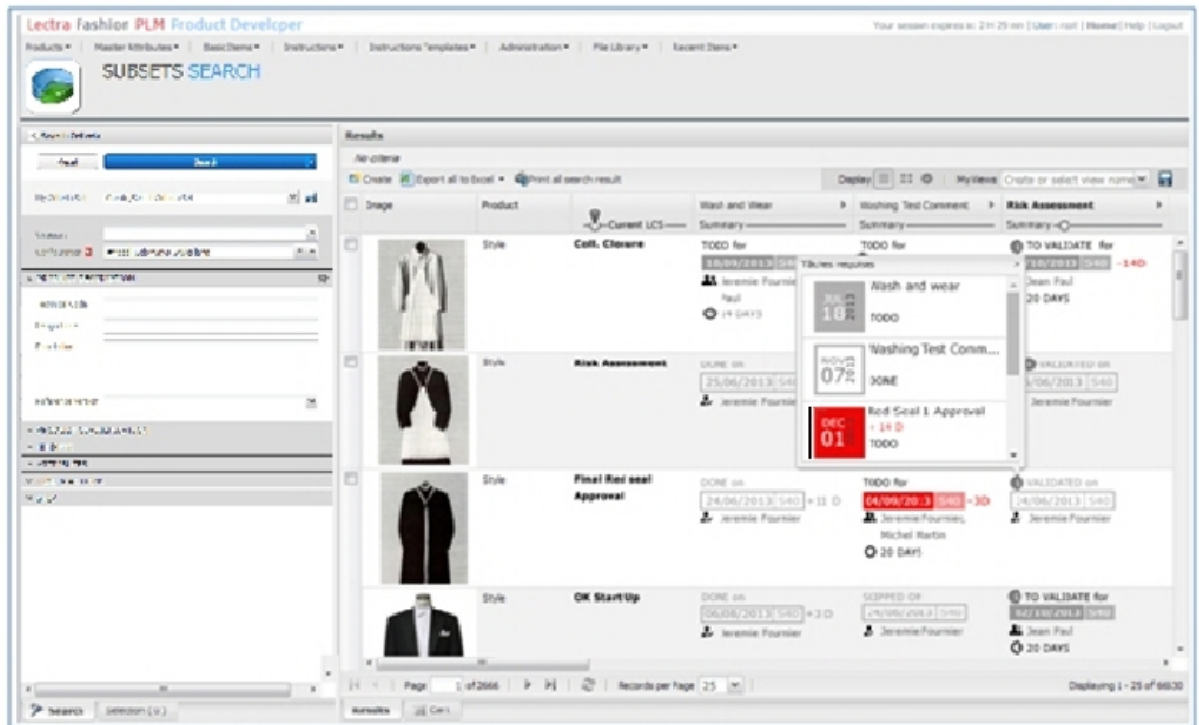
In expanded mode, the columns displayed are the ones selected in the display configuration .

9.2.2 Tracking progress in the Subsets explorer

The subsets explorer provides a summary of the progress of development of several subsets. It enables you to spot very quickly anything that is overdue.




The data display can be configured (see [Configuring the Subsets explorer view](#) above). Each user will have a customized view of the data that concern them.

In addition, for each lifecycle state displayed, a tooltip in the **Summary** area identifies the tasks that it depends on (**Required tasks**).



9.3 Time & Actions tab - Viewing schedule data

The **Time & Actions** tab gives you a clear view of how the development of a particular subset is progressing.

1. In the Subsets explorer, select the subset that you want to view in detail.
2. Click on  **Consult** or  **Edit**.
Click on the **Time & Actions** tab to display its content.
OR
Click on the clickable link of the subset **Name**.
The **Time & Actions** tab opens immediately.
3. The following information is available on this tab:
 - (a) The name of the **Process** associated with the subset
 - (b) The current **lifecycle state**
 - (c) The scheduling information for the subset
 - (d) Information about the number of baselines saved
 - (e) The list of lifecycle states and tasks
 - (f) The schedule and the status of each step (scheduled finish, forecast finish, overdue, duration, resource, status, validated by, etc.)
 - (g) The scroll bar on the right gives you an overview of subset progress with visual indication of anything that is overdue.
 -  : for each lifecycle state to be validated, this identifies the tasks that it depends on (**Required tasks**)

Domain **Time & Actions**

Process: ProcessSample_607...kLF5_bbanug * Current Lifecycle State: 000_IR * Validation - Date: 03/13/2014 * By: BaseLine * By: d

Scheduling: Backward * Scheduled Start: 03/13/2014 C Scheduled Finish: 12/19/2014 * 295 D * Forecast Finish: 10/10/2015

Name	Bypassed	Predecessor(s)	Scheduled Finish	Forecast Fin...	Duration...	Resource(s)	Resource Type	Status	To Redo	Validation - ...	Validation - ...	Com
000_IR			03/13/2014	03/13/2014		0 Business_Planning DPL Finance CLB	resourceType	Validated		03/13/2014		
101_Briefing supplier		000_IR	03/17/2014	01/06/2015	+ 295	5 Business_Planning DPL Supplier 1	resourceType101	To Do				
102_Pattern sending		101_Briefing supplier	04/06/2014	01/16/2015	+ 285	10 Business_Planning Pattern_Designer SDE_Purchasing...	resourceType102	To Do				
103_Envoi des COG Target		101_Briefing supplier	03/22/2014	01/11/2015	+ 295	5 Project_Buyer SDE_Purchasing... root	resourceType103	To Do				
104_Selection matiere		103_Envoi des COG Target	04/06/2014	01/26/2015	+ 295	15 DPL SDE_Purchasing... root	resourceType104	To Do	✓			
105_Reception Proto		104_Selection matiere 102_Pattern sending	04/16/2014	02/05/2015	+ 295	10 DPL FGSP MEP	resourceType105	To Do				
106_Reception prix		105_Reception Proto	04/17/2014	02/06/2015	+ 295	1 FGSP MEP Project_Buyer	resourceType106	To Do				
100_WSColl.Closure		106_Reception prix	05/02/2014	02/21/2015	+ 295	15 DPL Finance CLB	resourceType	To be Validated				

9.4 To Do List - Viewing schedule data


My To Do List presents all the actions (tasks and lifecycle states) allocated to the current user, which are planned as part of the process. All the steps are presented in the chronological order of the **Scheduled Finish** dates. Any change in the schedule data or the completion of a step causes **My To Do List** to be updated.

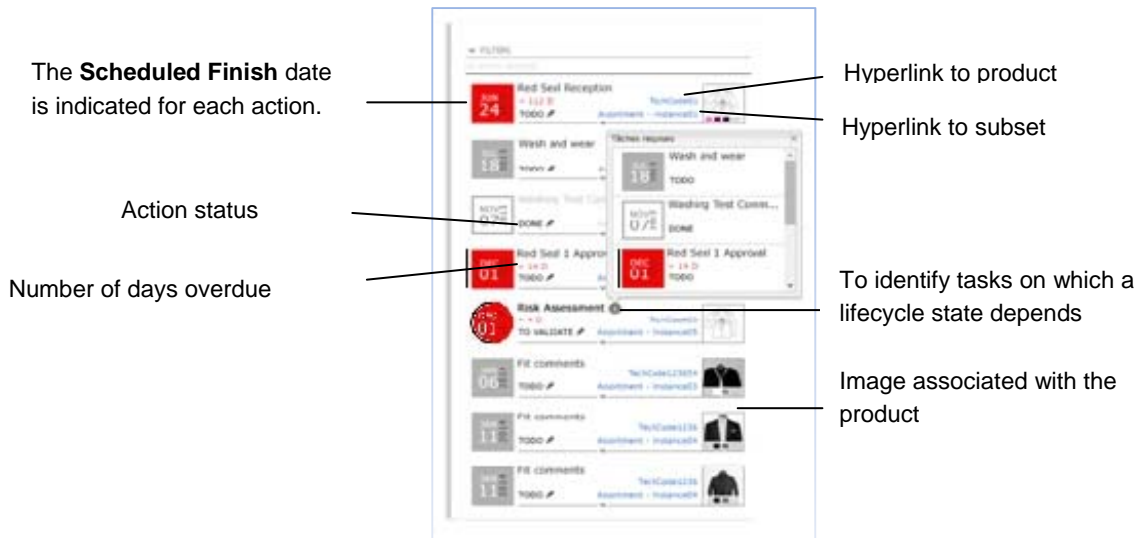
The current user is therefore kept informed of any action to be taken, anything overdue, and the priorities.

The **filter** option in **My To Do List** lets you create a personalized display based on very specific criteria.

In addition, **My To Do List's** hypertext links allow **direct navigation** to the products concerned.

Batch editing directly in **My To Do List** also makes rapid schedule updates possible.



The closed view of **My To Do List**  tells the user the number of actions to be performed and the number overdue, so that they can quickly see if there are actions to be carried out and if anything is overdue.






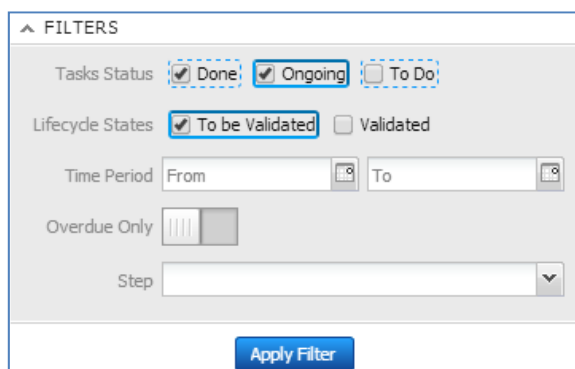
9.4.1 Configuring the My To Do List display

Filtering the display

The My To Do List display can be configured based on a number of criteria such as Status, Time Period, whether or not an action is overdue, Name, etc., making the display more relevant.

1. Click on the **My To Do List** bar to open it . The bar is accessible at all times, regardless of the screen you are working in.
2. Click on  to select the filters to apply.

 The  concerns filters that have been applied. The  concerns criteria that have been modified by the user and not yet applied.



3. Confirm with **Apply Filter**. **My To Do List** is updated.



Default filter:

A lifecycle state with the status **Validated** no longer appears by default in **My To Do List**. Similarly, a task with the status **Done** no longer appears by default in **My To Do List**.

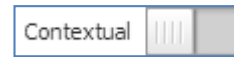
Default sorting:

All the actions are presented in the chronological order of the **Scheduled Finish** dates.

Contextual display of actions for a particular product



Display in **My To Do List** of all the actions allocated to the user for a particular product



Display in **My To Do List** of all the actions allocated to the user for all products



The counters for the closed view of **My To Do List** always cover everything; they are not contextual.

10. FREEZING A BASELINE

The **Baseline** function lets you take a snapshot of a current schedule and save it.

This baseline is used as a point of comparison to determine any deviations. The different saves can be reused for comparison with the current data. Schedule reports can be generated.



As many baselines as necessary can be frozen for each schedule.

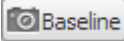
The schedule numbers increment automatically.

When a copy of the subset is made or a new version is created, the schedules are copied by default so that analyses can be performed on the original schedule data.

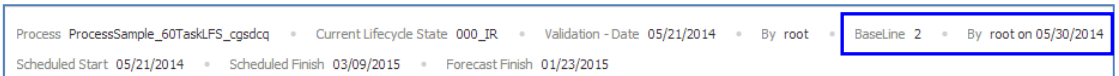
Reports can be run on old versions of the subset schedule (one schedule in particular) to be able to compare it with the current data.

When deleting a subset, the data in the associated baseline(s) are also deleted.

10.1 Freezing a baseline

1. On the **Time & Actions** tab, in consultation mode, click on  to keep a snapshot of it.
2. The number of the last baseline is displayed, as well as the name of the person who created it and the creation date.



Example:

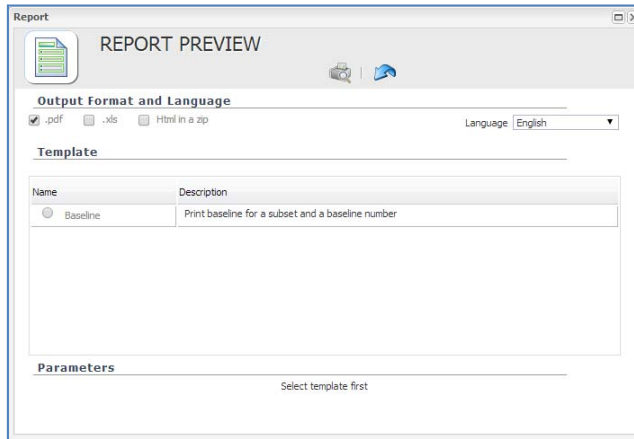


Saved schedules can be viewed through reports.

10.2 Creating a report on a particular schedule

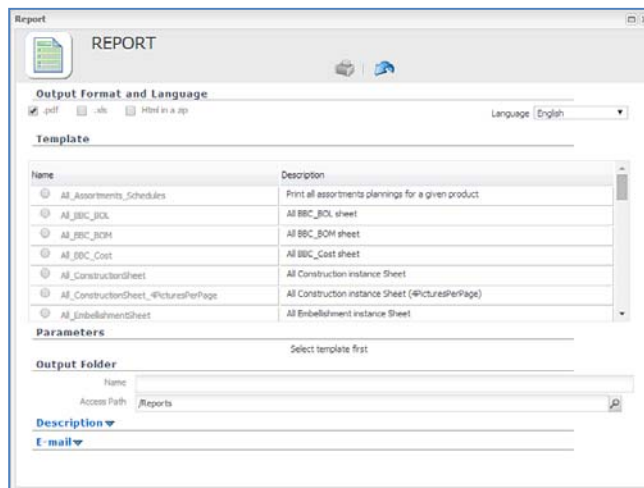
A report can be generated on a particular schedule. The report is based on a schedule number and presents the schedule data in a similar way to the **Time & Actions** tab.


1. In a subset, click on  (**Print**) or select **Print with preview** (accessible by clicking on ).
2. In the **REPORTS PREVIEW WINDOW**:
 - In the **Report template** area, check the **Baseline** button to choose this report template.
 - In the **Parameters** area, enter the number of the baseline for which the report is being created.
If the number is not entered or is entered incorrectly, the most recent baseline will be used by default.




3. In the REPORT window:
Some extra fields are displayed:

- In the **Output folder**, choose the name, location and path of the folder for saving the report.
- A comment may be entered in the **Description** area.
- In the **Email** area you can choose to send an email with the report attached. If so, enter the message recipients.



4. Click on  to generate the report.

The report, available in the **File manager** will have to be downloaded () to be viewed.

Planning de référence										TestNico	
Lectra										V1.1	
Assortment_With_Planning / Assortment_With_Planning0											
Processus		TestNico		Fin planifiée		10/21/2013		Planning de référence		2	
Début planifié		10/07/2013		Fin prévisionnelle		05/06/2014		Par		root	
Etat de cycle de vie courant		Initial LCS						Le		05/05/2014	
Libellé	Fin Planifiée	Fin Prévisionnelle	Retard (Jours)	Durée (Jours)	Statut	Ignorée	Type de ressource	A Refaire	Validation - date	Validation - Par	
O Initial LCS	10/07/2013	10/07/2013	0	0	Validé				10/07/2013		
Toto	10/18/2013	05/06/2014	135	5	Fait	Ignorée le 04/08/2014 root		<input type="checkbox"/>	04/08/2014	root	
01_Task1	10/11/2013	05/05/2014	139	4	A faire		Validation	<input checked="" type="checkbox"/>			
O 00_LCS0	10/21/2013	05/06/2014	134	1	A valider						

11. ADJUSTING THE SCHEDULE / VALIDATING STEPS

If anything is identified that is overdue or after changes have been made, it is often necessary to adjust the schedule. Validating a step can also produce significant changes.

It is possible to:

- **change the allocation of resources**
- **adjust the duration** of the different steps
- **bypass a task** that is no longer necessary for the development of a subset
- **change the status of a step**
- **put a schedule on hold** then resume it if necessary
- **change a process**
- **change calendar** associated to a schedule and to particular steps
- apply **constraint dates** to steps

The forecast dates are then automatically recalculated.

11.1 Batch editing in the Subset explorer


Certain actions can be performed on a batch of several subsets at once.



Individual editing is also possible by double-clicking in the editable cells.

- Batch modify:
 - **resources** allocated to a single step
 - the **duration** of a single step
 - the **status** of a step
 - the **calendar** globally associated to a schedule or to the steps
- Bypass tasks on several subsets at once

11.1.1 To adjust the duration of certain steps and reallocate resources


1. In the Subsets explorer, select the subsets for which you want to modify the durations and/or resources of certain steps.
2. Expand the step concerned.
3. Click on  in the header of the column to be modified (**Duration, Resource**).
4. From the drop-down menu that appears select new values.
5. Click **Replace** (for the Resources) or **Add** (for the Durations).
6. Save.

The forecast dates are then automatically recalculated.



Sometimes you have to refresh the page to make the updates appear.

11.1.2 To bypass tasks

1. In the Subsets explorer, select the subsets for which you want to bypass certain tasks.
2. Expand the task concerned.
3. Click on  in the header of the **Bypassed** column.
4. From the drop-down menu that appears, select Yes to bypass the task.
5. Click **Replace**.
6. Save.
The forecast dates in the schedules for the modified subsets are recalculated.



Bypassed tasks will appear crossed out and will no longer be counted in the calculation of the dates.

Summary	Bypassed	Duration...	Forecast Fin...	Predecessor(s)	Overdue (Days)
Bypassed on 05/30/2014 root	Bypassed on 05/30/2014 root	29	08/29/2014	324_Greige-Commit	+4

A bypassed task cannot be changed back to non-bypassed if the lifecycle state it depends on has already been validated.

11.1.3 To change the status of a step in the Subsets explorer




Only users allocated to an action can change the status of that action.

11.1.3.1 Validating/Invalidating a task

The different task statuses are:

- **To Do**
- **Ongoing**
- **Done**
- **Customized statuses**

Validating a task consists of changing its status to **Done**. Although tasks are displayed in order, you can bring actions forward (i.e. validate tasks early).

1. In the Subsets explorer, select the subsets for which you want to change the status of certain tasks.
2. Expand the task concerned.
3. Click on  in the header of the **Status** column.



If you only want to modify a single subset, you can double-click in the cell to be modified to go into edit mode.

4. From the list, choose the new status: **To Do**, **Ongoing** or **Done**.
5. Click **Replace**.

6. Save.



Validating tasks (after saving them) updates the forecast dates in the subset schedule.

By default the validation date is the current day's date. It can be replaced with an earlier date.

11.1.3.2 Validating/Invalidating a lifecycle state




Only users allocated to an action can change the status of that action.

Lifecycle states can be:

- **Validated**
- **To Be Validated**

To validate a lifecycle state, all the tasks required to reach this lifecycle state have to be done (or bypassed). Several lifecycle states can be validated at once.

1. In the Subsets explorer, select the ones for which you want to modify the current lifecycle state.
2. Click on  in the header of the **Lifecycle state** column.



If you only want to modify a single subset, you can double-click in the cell to be modified to go into edit mode.

3. From the list, choose the lifecycle state that you want to reach.
4. Click **Replace**.
5. Save.




When you perform this operation in batch mode, all the lifecycle states of the selected subsets appear in the list. However, not all the subsets are necessarily based on the same process or allocated to the same resources. Only subsets that have the selected lifecycle state in their process will be updated.


By default the validation date is the current day's date. It can be replaced with an earlier date.

Restoring a previous lifecycle state

- When a lifecycle state is wound backwards, only the tasks **To redo** are reopened (even the ones that had been bypassed). The change becomes effective on saving. The actions corresponding to these tasks appear again in the **To Do Lists** of the affected users.
- The status of the lifecycle states that follow the new current lifecycle state is changed to **To Be Validated**.
- On saving, the forecast dates in the schedule are updated in line with the current status of the schedule.

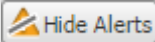
11.1.4 To apply constraint dates to steps

1. In the Subsets explorer, select the ones you want to apply a constraint date to on a step.
2. Expand the step concerned.
3. Click on  in the header of the **Scheduled Finished** column.

4. Enter a date or choose a new one.
5. Click **Replace**.
6. Save.
7. The forecast dates in the schedule of the modified subsets are recalculated.
 - If the constraint date is not in conflict with any other date, the constraint is accepted and appears **in bold**. The schedule takes the new constraint into account.
 - If the constraint date causes dates to overlap, it is ignored and the **Scheduled Finish** date is automatically recalculated. The user is alerted by the  icon in the cell (backed up with a message).

The line also appears in alert : 






The user can hide all alerts by clicking on .



Constraint dates:

- On bypassed task or task with Status set as Done: not possible to apply a constraint date
- On a holiday: the date is automatically replaced by the following business day (in case of forward scheduling) or previous business day ((in case of backward scheduling)
- On the last lifecycle state in case of backward scheduling: Scheduled Finish date cannot be edited

11.1.4.1 Modifying / Deleting a constraint date


1. In the Subsets explorer, select the ones for which you want to modify or delete a constraint date on a step.
2. Expand the step concerned.
3. Click on  in the header of the **Scheduled Finished** column.
4. To delete the constraint date: click on  and then **Replace**. **Auto.** is displayed in the cell(s) affected by the deletion.
5. To delete the constraint date: enter a date or click on  to choose one and then click **Replace**.
6. Save.
The schedule is automatically recalculated and the modified cells display the new **Scheduled Finished** date.



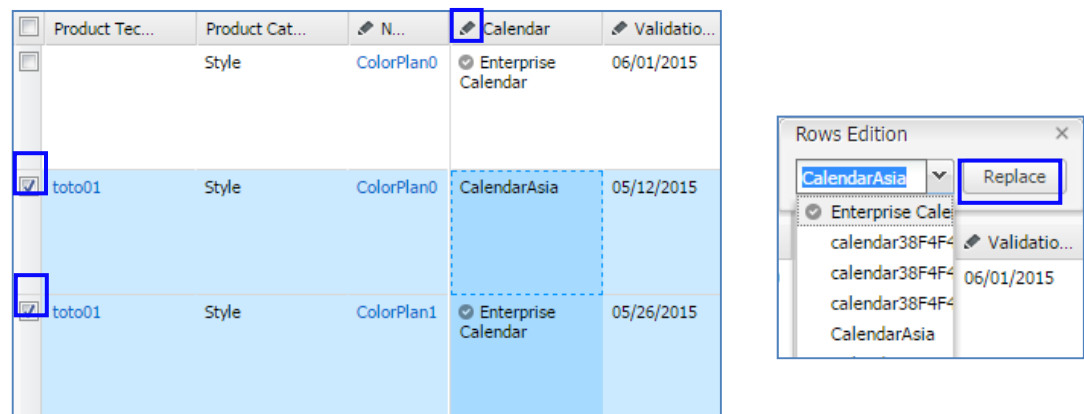
To modify a single subset, the user can double-click in the cell to modify.

11.1.5 To change the calendar associated to one or more schedules

When scheduling a subset, the calendar associated by default is automatically taken into account in the calculation of the dates (See [To associate a calendar to the process](#)); it can however be changed.


1. In the Subsets explorer, select the subsets for which you want to associate the same calendar.
2. Click on  in the header of the **Calendar** column.
3. From the drop-down menu that appears, select the calendar to associate.
4. Click **Replace**.
5. Save.
The forecast dates in the schedules for the modified subsets are recalculated taking into account the new calendar.

Ex:



11.1.6 To change the calendar associated to one or more steps

The calendar associated to one or more steps can be changed.

1. In the Subsets explorer, select the ones you want to modify the calendar associated to a step.
2. Expand the step concerned.
3. Click on  in the header of the **Calendar** column.
4. From the drop-down menu that appears, select the calendar to associate.
5. Click **Replace**.
6. Save.
The forecast dates in the schedules of the modified subsets are recalculated taking into account the new calendar.


11.2 Editing a subset on the Time & Actions tab

In the detailed view of a particular subset, you can:

- **change the associated process**

- **change the start/finish dates** of development
- **put development on hold**
- **adjust the dates and durations of each step**
- **reallocate the resources of a step**
- **bypass a task** considered to be unnecessary
- **change the status** of a step
- **change the calendar** associated to a schedule and/or some steps
- apply **constraint dates** to steps

11.2.1 To change the process and/or modify the various project dates


1. Open the **Time & Actions** tab for the subset to be modified.
2. Activate the edit mode .
3. In the description part of the subset (the top part),
 - expand the drop-down list of **Processes** available and select one.
 - Change the various dates.
4. Save.



The progress of the steps in the old process is not kept when the process is changed. A warning message will appear to tell you this.

5. Repeat the scheduling.
The scheduled and forecast dates are reset after the change and you have to redo the schedule to have dates?

11.2.2 To adjust the durations of certain steps, reallocate the resources and bypass a task

1. Open the **Time & Actions** tab of the subset to be modified.
2. Activate the edit mode .
3. Double-click in the cell to be modified.
4. Choose the new value.
OR
Check the box to bypass the step.
5. Save.
The forecast dates are then automatically recalculated.



Bypassed tasks:

- will appear crossed out and will no longer be counted in the calculation of the dates.
- will no longer be editable (except for the comments and attachment)

Name	Bypassed	Predecessor(s)	Scheduled Fi...	Forecast Fin...	...	Duration...	Resource(s)	Resource Type	Status
000_IR			03/28/2014	04/14/2014		+ 11	0 Business_Planning DPL	resourceType	Validated
101_Briefing supplier		000_IR	04/01/2014	04/15/2014		+ 8	5 Business_Planning DPL	resourceType101	Done
102_Pattern-sending	Bypassed on 04/08/2014	101_Briefing supplier	04/21/2014	04/15/2014		-	10 Business_Planning Pattern_Designer	resourceType102	Done

If a task has been bypassed, then the lifecycle state on which it depends is validated, it will no longer be possible to change it back to non-bypassed.

11.2.3 To change the status of a step on the Time & Actions tab



Only users allocated to an action can change the status of that action.

On the **Time & Actions** tab, the status of the steps in a subset can be modified.

Although tasks are displayed in order, you can bring actions forward and validate them early.

However, to validate a lifecycle state, all the tasks required to reach this lifecycle state have to be done (or bypassed).



To make them easier to see, validated steps (**Validated** status for a lifecycle state, or **Done** for a task) appear in light gray in the table.

The validation date (by default, the current day's date) and the name of the person who did the validation are indicated.


211_Passation dossier R&S Tech.		100_VisCol.Closure	05/27/2014	05/30/2014		+ 3	10 DPL R&S Tech R&S	resourceType211	To Do
212_Risk assessment 1		211_Passation dossier new	05/29/2014	05/31/2014			10 DPL Finance_CLI	resourceType212	Done
300_FinalizedApprov		210_VisCol tests results	05/22/2014	05/30/2014			1 DPL R&S	resourceType	To be validated
301_Tableau col V0		100_VisCol.Closure	05/27/2014	05/30/2014		+ 3	5 Finance_CLI R&S R&S	resourceType301	To Do

11.2.3.1 Validating/Invalidating a task

The different task statuses are:

- **To Do**
- **Current**
- **Done**
- **Customized statuses (e.g. 25%, 50%, 75%)**

Validating a task consists of changing its status to **Done**. Although tasks are displayed in order, you can bring actions forward and therefore validate future tasks early.

1. On the **Time & Actions** tab for the subset, activate the edit mode .
2. In the **Status** column, double-click on the cell of the task for which you want to change the status.

- From the drop-down list, choose the new status: **Ongoing**, **Done** or **To Do**.

Name	Bypassed	Predecessor(s)	Scheduled Fi...	Forecast Fin...	...	Duration...	Resource(s)	Resource Type	Status	To Redo
323_Stamped Red Seal sending	-	322_PFS Available	09/14/2014	09/14/2014			5 Business_Planning PPC	resourceType323	To Do	-
324_Greige Commit	-	312_PRice validation into C	08/05/2014	08/09/2014	+ 4		5 Business_Planning MKT_Tableau_C...	resourceType324	To Do	-

- Save.



Validating tasks (after **saving** them) updates the forecast dates in the subset schedule.


By default, the validation date is the current day's date. It can be replaced with an earlier date.

11.2.3.2 Validating/Invalidating a lifecycle state

Lifecycle states can be:

- Validated**
- To Be Validated**

To validate a lifecycle state, all the tasks required to move on to the next one have to be done or bypassed.

- On the **Time & Actions** tab for the subset, enter edit mode .
- A new value is chosen for the current lifecycle state in the bar above the table. From the drop-down list, choose the lifecycle state that you want to reach.

Domain		Time & Actions	
Process	ProcessSample_60TaskLFS_cgsdcq	Current Lifecycle State	000_IR
Scheduled Start	03/28/2014	Scheduled Finish	01/03/2015 + 9 D
Name	Bypassed	Predecessor(s)	Sche
000_IR			
101_Briefing supplier	-	000_IR	



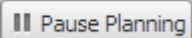
The drop-down list only contains the lifecycle states that can be selected. If the user is not the allocated resource, they will not see certain states in the list.

The lifecycle states that cannot be reached (in this example 300 to 700) are grayed out. Some required tasks are still to do.

Restoring a previous lifecycle state

- When a lifecycle state is wound backwards, only the tasks **To redo** are reopened (even the ones that had been bypassed). The change becomes effective on saving. The actions corresponding to these tasks appear again in the **To Do Lists** of the affected users.
- The status of the lifecycle states that follow the new current lifecycle state is changed to **To Be Validated**.
- On saving, the forecast dates in the schedule are updated in line with the current status of the schedule.

11.2.4 To put a schedule on hold / To resume a schedule on the Time & Actions tab

Click on  to put it on hold. No more actions can be performed on this schedule (except adding a comment or an attachment).


The schedule on hold is displayed grayed out and hatched.

Name	Bypassed	Predecessor(s)	Scheduled Fi...	Forecast Fin...	...	Duration...	Resource(s)	Resource Type	Status
000_IR			03/28/2014	04/14/2014		+ 11	0 Business_Planning DPL	resourceType	Validated
101_Briefing supplier		000_IR	04/01/2014	04/15/2014		+ 8	5 Business_Planning DPL	resourceType101	Done
102_Pattern sending	Bypassed on 04/08/2014	101_Briefing supplier	04/21/2014	04/15/2014		-	10 Business_Planning Pattern_Designer	resourceType102	Done

Click on  to resume development of the subset. The schedule is automatically recalculated.

11.2.5 To apply constraint dates to steps

1. Open the **Time & Actions** tab of the subset to be readjusted.


2. Activate the edit mode .

1. Double-click in the **Scheduled Finished** cell where you want to apply a constraint date.

2. Enter a date or click on  to choose one.

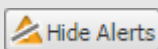
3. Save.

The forecast dates in the schedule are recalculated.

- If the constraint date does not conflict with any other date, the constraint is accepted and appears **in bold**. The schedule takes the new constraint into account.
- If the constraint date causes dates to overlap, it is ignored and the **Scheduled Finish** date is automatically recalculated. The user is alerted by the  icon in the cell (backed up with a message).



The user can hide all alerts by clicking on



Use cases where the constraint dates are ignored: 1) on Forward Schedules, 2) on Backward Schedules:

1) **Schedule on Forward** with the day's date for example - here the start date = **05/10/2016**

Instance Deliveries_FW_2016-2017 Usable Printable Type Status Date 05/09/2016

Domain Time & Actions

Baseline Schedule Pause Planning

Process Quick Response Style_Process Calendar Enterprise Calendar Current Lifecycle State 000_Started Validation - Date 05/10/2016 By - BaseLine - By -

Scheduling Forward Scheduled Start 05/10/2016 Scheduled Finish 08/30/2016 Forecast Finish 08/30/2016

Name	Predecessor(s)	Scheduled Finish	Forecast Fin...	O...	Duration...	Resource(s)	Calendar	Status	Validation ...	Validation ...
000_Started		05/10/2016	05/10/2016		0		Enterprise Calendar	Validated	05/10/2016	
T600_Purchase Order	000_Started	05/23/2016	05/23/2016		10	developer buyer product_manager	Enterprise Calendar	To Do		
700_Ready for Production	T600_Purchase Order	05/30/2016	05/30/2016		5	pattern_maker developer buyer	Enterprise Calendar	To be Validated		
T700_Final Inspection of Production	700_Ready for Production	07/04/2016	07/04/2016		25	production_man... supplier1 supplier3	Enterprise Calendar	To Do		
900_Delivered	T700_Final Inspection of P	08/30/2016	08/30/2016		40	production_man... supplier1 supplier3	Enterprise Calendar	To be Validated		

If a step in the planning has a constraint before the start date (here 05/10/2016), the date will be ignored, here in the T600_Purchase Order, the user tried to put a date (e.g. 05/09/2016) < 05/10/2016 => the date is ignored

Instance Deliveries_FW_2016-2017 Usable Printable Type Status Date 05/09/2016

Domain Time & Actions

Baseline Schedule Pause Planning Hide Alerts

One or more Scheduled Finish have been ignored and replaced by an automatically calculated date.
You can either keep this calculated date or edit the Scheduled Finish and / or the duration of the highlighted steps.

Process Quick Response Style_Process Calendar Enterprise Calendar Current Lifecycle State 000_Started Validation - Date 05/10/2016 By - BaseLine - By -

Scheduling Forward Scheduled Start 05/10/2016 Scheduled Finish 08/30/2016 Forecast Finish 08/30/2016

Name	Predecessor(s)	Scheduled Finish	Forecast Fin...	O...	Duration...	Resource(s)	Calendar	Status	Validation ...	Validation ...
000_Started		05/10/2016	05/10/2016		0		Enterprise Calendar	Validated	05/10/2016	
T600_Purchase Order	000_Started	05/23/2016	05/23/2016		10	developer buyer product_manager	Enterprise Calendar	To Do		
700_Ready for Production	T600_Purchase Order	05/30/2016	05/30/2016		5	pattern_maker developer buyer	Enterprise Calendar	To be Validated		
T700_Final Inspection of Production	700_Ready for Production	07/04/2016	07/04/2016		25	production_man... supplier1 supplier3	Enterprise Calendar	To Do		
900_Delivered	T700_Final Inspection of P	08/30/2016	08/30/2016		40	production_man... supplier1 supplier3	Enterprise Calendar	To be Validated		

Now change the 700_ready for Production from 05/30/2016 to 06/02/2016, it will be OK because the new date is > than the 700_ready for Production date

Then, try to put 06/30/2016 on T700_Final Inspection of Production, the constraints date will be ignored because the planning is too constrained: 06/30/2016 is < to the date and the duration is not changed

Instance Deliveries_FW_2016-2017 Usable Printable Type Status Date 05/09/2016

Domain **Time & Actions**

Baseline Schedule Pause Planning Hide Alerts

One or more Scheduled Finish have been ignored and replaced by an automatically calculated date.
You can either keep this calculated date or edit the Scheduled Finish and / or the duration of the highlighted steps.

Process Quick Response Style_Process - Calendar Enterprise Calendar - Current Lifecycle State 000_Started - Validation - Date 05/10/2016 - By - - BaseLine - - By -

Scheduling Forward - Scheduled Start 05/10/2016 - Scheduled Finish 09/02/2016 - Forecast Finish 09/02/2016

Name	Predecessor(s)	Scheduled Finish	Forecast Fin...	O...	Duration...	Resource(s)	Calendar	Status	Validation -...	Validation -...
000_Started		05/13/2016	05/10/2016		0		Enterprise Calendar	Validated	05/10/2016	
T600_Purchase Order	000_Started	05/26/2016	05/26/2016		10	developer buyer product_manager	Enterprise Calendar	To Do		
700_Ready for Production	T600_Purchase Order	06/02/2016	06/02/2016		5	pattern_maker developer buyer	Enterprise Calendar	To be Validated		
T700_Final Inspection of Production	700_Ready for Production	07/07/2016	07/07/2016		25	production_man... supplier1 supplier3	Enterprise Calendar	To Do		
900_Delivered	T700_Final Inspection of F	09/02/2016	09/02/2016		40	production_man... supplier1 supplier3	Enterprise Calendar	To be Validated		

Now if you put on T700_Final Inspection of Production a date > 07/07/2016 for example here 07/11/2016, it will be OK:

Instance Deliveries_FW_2016-2017 Usable Printable Type Status Date 05/09/2016

Domain **Time & Actions**

Baseline Schedule Pause Planning

Process Quick Response Style_Process - Calendar Enterprise Calendar - Current Lifecycle State 000_Started - Validation - Date 05/10/2016 - By - - BaseLine - - By -

Scheduling Forward - Scheduled Start 05/10/2016 - Scheduled Finish 09/06/2016 - Forecast Finish 09/06/2016

Name	Predecessor(s)	Scheduled Finish	Forecast Fin...	O...	Duration...	Resource(s)	Calendar	Status	Validation -...	Validation -...
000_Started		05/13/2016	05/10/2016		0		Enterprise Calendar	Validated	05/10/2016	
T600_Purchase Order	000_Started	05/26/2016	05/26/2016		10	developer buyer product_manager	Enterprise Calendar	To Do		
700_Ready for Production	T600_Purchase Order	06/02/2016	06/02/2016		5	pattern_maker developer buyer	Enterprise Calendar	To be Validated		
T700_Final Inspection of Production	700_Ready for Production	07/11/2016	07/11/2016		25	production_man... supplier1 supplier3	Enterprise Calendar	To Do		
900_Delivered	T700_Final Inspection of F	09/06/2016	09/06/2016		40	production_man... supplier1 supplier3	Enterprise Calendar	To be Validated		

In another case: you can put a date < (e.g. 06/30/2016) on T700_Final Inspection of Production instead of 07/11/2016 but you have to put a lower duration; here the user has put 5 instead of 25 on T700_Final Inspection of Production, so it will be OK:

Instance Deliveries_FW_2016-2017 Usable Printable Type Status Date 05/09/2016

Domain **Time & Actions**

Baseline Schedule Pause Planning

Process Quick Response Style_Process - Calendar Enterprise Calendar - Current Lifecycle State 000_Started - Validation - Date 05/10/2016 - By - - BaseLine - - By -

Scheduling Forward - Scheduled Start 05/10/2016 - Scheduled Finish 08/26/2016 - Forecast Finish 08/26/2016

Name	Predecessor(s)	Scheduled Finish	Forecast Fin...	O...	Duration...	Resource(s)	Calendar	Status	Validation -...	Validation -...
000_Started		05/13/2016	05/10/2016		0		Enterprise Calendar	Validated	05/10/2016	
T600_Purchase Order	000_Started	05/26/2016	05/26/2016		10	developer buyer product_manager	Enterprise Calendar	To Do		
700_Ready for Production	T600_Purchase Order	06/02/2016	06/02/2016		5	pattern_maker developer buyer	Enterprise Calendar	To be Validated		
T700_Final Inspection of Production	700_Ready for Production	06/30/2016	06/30/2016		5	production_man... supplier1 supplier3	Enterprise Calendar	To Do		
900_Delivered	T700_Final Inspection of F	08/26/2016	08/26/2016		40	production_man... supplier1 supplier3	Enterprise Calendar	To be Validated		

In the below case: here the user has to change the duration of the T600_Purchase Order from 10 to 15, the modification of the duration will update the forecast planning:

Instance Deliveries_FW_2016-2017 Usable Printable Type Status Date 05/09/2016

Domain Time & Actions

Baseline Schedule Pause Planning

Process Quick Response Style_Process Calendar Enterprise Calendar Current Lifecycle State 000_Started Validation Date 05/10/2016 By BaseLine By

Scheduling Forward Scheduled Start 05/10/2016 Scheduled Finish 08/26/2016 Forecast Finish 08/26/2016

Name	Predecessor(s)	Scheduled Finish	Forecast Fin...	O...	Duration...	Resource(s)	Calendar	Status	Validation ...	Validation ...
000_Started		05/13/2016	05/10/2016		0		Enterprise Calendar	Validated	05/10/2016	
T600_Purchase Order	000_Started	05/26/2016	05/30/2016	+ 2	15	developer buyer product_manager	Enterprise Calendar	To Do		
700_Ready for Production	T600_Purchase Order	06/02/2016	06/06/2016	+ 2	5	pattern_maker developer buyer	Enterprise Calendar	To be Validated		
T700_Final Inspection of Production	700_Ready for Production	06/30/2016	06/30/2016		5	production_man... supplier1 supplier3	Enterprise Calendar	To Do		
900_Delivered	T700_Final Inspection of P	08/26/2016	08/26/2016		40	production_man... supplier1 supplier3	Enterprise Calendar	To be Validated		

Now make a schedule again using the day's date as the start date (here 05/10/2016)

The constraint date (06/02/2016) on 700_ready for Production is ignored because the planning is too constrained - the Planned end date is updated from 06/02/2016 to 06/23/2016

Instance Deliveries_FW_2016-2017 Usable Printable Type Status Date 05/09/2016

Domain Time & Actions

Baseline Schedule Pause Planning Hide Alerts

Process Quick Response Style_Process Calendar Enterprise Calendar Current Lifecycle State 000_Started Validation Date 05/10/2016 By BaseLine By

Scheduling Forward Scheduled Start 05/10/2016 Scheduled Finish 08/26/2016 Forecast Finish 08/26/2016

One or more Scheduled Finish have been ignored and replaced by an automatically calculated date. You can either keep this calculated date or edit the Scheduled Finish and / or the duration of the highlighted steps.

Name	Predecessor(s)	Scheduled Finish	Forecast Fin...	O...	Duration...	Resource(s)	Calendar	Status	Validation ...	Validation ...
000_Started		05/27/2016	05/10/2016		0		Enterprise Calendar	Validated	05/10/2016	
T600_Purchase Order	000_Started	06/16/2016	06/16/2016		15	developer buyer product_manager	Enterprise Calendar	To Do		
700_Ready for Production	T600_Purchase Order	06/23/2016	06/23/2016		5	pattern_maker developer buyer	Enterprise Calendar	To be Validated		
T700_Final Inspection of Production	700_Ready for Production	06/30/2016	06/30/2016		5	production_man... supplier1 supplier3	Enterprise Calendar	To Do		
900_Delivered	T700_Final Inspection of P	08/26/2016	08/26/2016		40	production_man... supplier1 supplier3	Enterprise Calendar	To be Validated		

2) Schedule on Backward with a planned end date of 08/30/2016 for example

Instance Deliveries_BW_2016-2017 Usable Printable Type Status Date 05/09/2016

Domain Time & Actions

Baseline Schedule Pause Planning

Process Quick Response Style_Process Calendar Enterprise Calendar Current Lifecycle State 000_Started Validation Date 05/10/2016 By BaseLine By

Scheduling Backward Scheduled Start 05/10/2016 Scheduled Finish 08/30/2016 Forecast Finish 08/30/2016

Name	Predecessor(s)	Scheduled Finish	Forecast Fin...	O...	Duration...	Resource(s)	Calendar	Status	Validation ...	Validation ...
000_Started		05/10/2016	05/10/2016		0		Enterprise Calendar	Validated	05/10/2016	
T600_Purchase Order	000_Started	05/23/2016	05/23/2016		10	developer buyer product_manager	Enterprise Calendar	To Do		
700_Ready for Production	T600_Purchase Order	05/30/2016	05/30/2016		5	pattern_maker developer buyer	Enterprise Calendar	To be Validated		
T700_Final Inspection of Production	700_Ready for Production	07/04/2016	07/04/2016		25	production_man... supplier1 supplier3	Enterprise Calendar	To Do		
900_Delivered	T700_Final Inspection of P	08/30/2016	08/30/2016		40	production_man... supplier1 supplier3	Enterprise Calendar	To be Validated		

If a step is constrained after the end date (here 08/30/2016), the date will be ignored, here on T700_Final Inspection of Production, the user tried to put a date (e.g. 08/31/2016) > 08/30/2016

Instance Deliveries_BW_2016-2017 Usable Printable Type Status Date 05/09/2016

Domain Time & Actions

Baseline Schedule Pause Planning Hide Alerts

One or more Scheduled Finish have been ignored and replaced by an automatically calculated date. You can either keep this calculated date or edit the Scheduled Finish and / or the duration of the highlighted steps.

Process Quick Response Style_Process Calendar Enterprise Calendar Current Lifecycle State 000_Started Validation - Date 05/10/2016 By - BaseLine - By -

Scheduling Backward Scheduled Start 05/10/2016 Scheduled Finish 08/30/2016 Forecast Finish 08/30/2016

Name	Predecessor(s)	Scheduled Finish	Forecast Fin...	O...	Duration...	Resource(s)	Calendar	Status	Validation -...	Validation -...
000_Started		05/10/2016	05/10/2016		0		Enterprise Calendar	Validated	05/10/2016	
T600_Purchase Order	000_Started	05/23/2016	05/23/2016		10	developer buyer product_manager	Enterprise Calendar	To Do		
700_Ready for Production	T600_Purchase Order	05/30/2016	05/30/2016		5	pattern_maker developer buyer	Enterprise Calendar	To be Validated		
T700_Final Inspection of Production	700_Ready for Production	07/04/2016	07/04/2016		25	production_man... supplier1 supplier3	Enterprise Calendar	To Do		
900_Delivered	T700_Final Inspection of P	08/30/2016	08/30/2016		40	production_man... supplier1 supplier3	Enterprise Calendar	To be Validated		

Now change the T700_Final Inspection from 07/04/2016 to 06/27/2016, it will be OK because 06/27/2016 is < to 07/04/2016 and then, try to put 06/01/2016 on 700_ready for Production, the constraint date will be ignored because 06/01/2016 is > the end date of 700_ready for Production, the planning is too constrained:

Instance Deliveries_BW_2016-2017 Usable Printable Type Status Date 05/09/2016

Domain Time & Actions

Baseline Schedule Pause Planning Hide Alerts

One or more Scheduled Finish have been ignored and replaced by an automatically calculated date. You can either keep this calculated date or edit the Scheduled Finish and / or the duration of the highlighted steps.

Process Quick Response Style_Process Calendar Enterprise Calendar Current Lifecycle State 000_Started Validation - Date 05/02/2016 By - BaseLine - By -

Scheduling Backward Scheduled Start 05/02/2016 Scheduled Finish 08/30/2016 Forecast Finish 08/23/2016

Name	Predecessor(s)	Scheduled Finish	Forecast Fin...	O...	Duration...	Resource(s)	Calendar	Status	Validation -...	Validation -...
000_Started		05/02/2016	05/02/2016		0		Enterprise Calendar	Validated	05/02/2016	
T600_Purchase Order	000_Started	05/16/2016	05/16/2016		10	developer buyer product_manager	Enterprise Calendar	To Do		
700_Ready for Production	T600_Purchase Order	05/23/2016	05/23/2016		5	pattern_maker developer buyer	Enterprise Calendar	To be Validated		
T700_Final Inspection of Production	700_Ready for Production	06/27/2016	06/27/2016		25	production_man... supplier1 supplier3	Enterprise Calendar	To Do		
900_Delivered	T700_Final Inspection of F	08/30/2016	08/23/2016		40	production_man... supplier1 supplier3	Enterprise Calendar	To be Validated		

Now if you put on T700_Final Inspection of Production a date < 05/23/2016 for example here 05/10/2016, it will be OK:

Instance Deliveries_BW_2016-2017 Usable Printable Type Status Date 05/09/2016

Domain Time & Actions

Baseline Schedule Pause Planning

Process Quick Response Style_Process Calendar Enterprise Calendar Current Lifecycle State 000_Started Validation - Date 04/19/2016 By - BaseLine - By -

Scheduling Backward Scheduled Start 04/19/2016 Scheduled Finish 08/30/2016 Forecast Finish 08/23/2016

Name	Predecessor(s)	Scheduled Finish	Forecast Fin...	O...	Duration...	Resource(s)	Calendar	Status	Validation -...	Validation -...
000_Started		04/19/2016	04/19/2016		0		Enterprise Calendar	Validated	04/19/2016	
T600_Purchase Order	000_Started	05/02/2016	05/10/2016	+ 5	10	developer buyer product_manager	Enterprise Calendar	To Do		
700_Ready for Production	T600_Purchase Order	05/10/2016	05/17/2016	+ 5	5	pattern_maker developer buyer	Enterprise Calendar	To be Validated		
T700_Final Inspection of Production	700_Ready for Production	06/27/2016	06/27/2016		25	production_man... supplier1 supplier3	Enterprise Calendar	To Do		
900_Delivered	T700_Final Inspection of F	08/30/2016	08/23/2016		40	production_man... supplier1 supplier3	Enterprise Calendar	To be Validated		

In another case: you can keep 06/01/2016 on 700_ready for Production instead of 05/10/2016 but you have to put a lower duration; here the user has put 10 instead of 25 on T700_Final Inspection, so it will be OK:

Instance Deliveries_BW_2016-2017 Usable Printable Type Status Date 05/09/2016

Domain Time & Actions

Baseline Schedule Pause Planning

Process Quick Response Style_Process Calendar Enterprise Calendar Current Lifecycle State 000_Started Validation - Date 05/12/2016 By - BaseLine - By -

Scheduling Backward Scheduled Start 05/12/2016 Scheduled Finish 08/30/2016 Forecast Finish 08/23/2016

Name	Predecessor(s)	Scheduled Finish	Forecast Fin...	O...	Duration...	Resource(s)	Calendar	Status	Validation -...	Validation -...
000_Started		05/12/2016	05/12/2016		0		Enterprise Calendar	Validated	05/12/2016	
T600_Purchase Order	000_Started	05/25/2016	05/25/2016		10	developer buyer product_manager	Enterprise Calendar	To Do		
700_Ready for Production	T600_Purchase Order	06/01/2016	06/01/2016		5	pattern_maker developer buyer	Enterprise Calendar	To be Validated		
T700_Final Inspection of Production	700_Ready for Production	06/27/2016	06/27/2016		10	production_man... supplier1 supplier3	Enterprise Calendar	To Do		
900_Delivered	T700_Final Inspection of P	08/30/2016	08/23/2016		40	production_man... supplier1 supplier3	Enterprise Calendar	To be Validated		

Now change the duration to 25 instead of 10 on T700_Final Inspection and make a schedule again with an end date of 08/30/2016, the constraint date on 700_ready for Production will be ignored

Instance Deliveries_BW_2016-2017 Usable Printable Type Status Date 05/09/2016

Domain Time & Actions

Baseline Schedule Pause Planning Hide Alerts

Process Quick Style_Process Calendar Enterprise Calendar Current Lifecycle State 000_Started Validation - Date 05/02/2016 By - BaseLine - By -

Scheduling Backward Scheduled Start 05/02/2016 Scheduled Finish 08/29/2016 Forecast Finish 08/23/2016

Warning: One or more Scheduled Finish have been ignored and replaced by an automatically calculated date. You can either keep this calculated date or edit the Scheduled Finish and / or the duration of the highlighted steps.

Name	Predecessor(s)	Scheduled Finish	Forecast Fin...	O...	Duration...	Resource(s)	Calendar	Status	Validation - D...	Validation -...
000_Started		05/02/2016	05/02/2016		0		Enterprise Calendar	Validated	05/02/2016	
T600_Purchase Order	000_Started	05/16/2016	05/16/2016		10	developer buyer product_manager	Enterprise Calendar	To Do		
700_Ready for Production	T600_Purchase Order	05/23/2016	05/23/2016		5	pattern_maker developer buyer	Enterprise Calendar	To be Validated		
T700_Final Inspection of Production	700_Ready for Production	06/27/2016	06/27/2016		25	production_man... supplier1 supplier3	Enterprise Calendar	To Do		





Constraint dates:

On bypassed task or task with Status set as Done: not possible to apply a constraint date


On a holiday: the date is automatically replaced by the following business day (in case of forward scheduling) or previous business day ((in case of backward scheduling)

On the last lifecycle state in case of backward scheduling: Scheduled Finish date cannot be edited


11.2.5.1 Modifying / Deleting a constraint date

1. To delete the constraint date: double-click on the **Scheduled Finished** cell and then on . **Auto.** is displayed in the cell(s) affected by the deletion.
2. To delete the constraint date: enter a date or click on  to choose one.
3. Save.
The schedule is automatically recalculated and the modified cells display the new **Scheduled Finished** date.

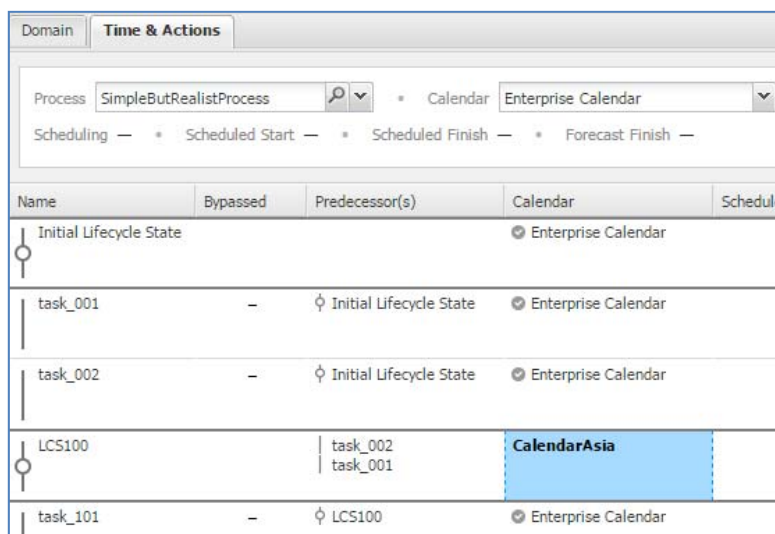
11.2.6 To modify the calendar associated to a schedule

1. Open the **Time & Actions** tab of the subset to be readjusted.
2. Activate the edit mode .
3. In the subset descriptive area (the upper part), scroll down the list of available calendars and select one.
4. Save.
The forecast dates in the schedule are recalculated.

11.2.7 To modify the calendar associated to a schedule step

1. Open the **Time & Actions** tab of the subset to be modified.
2. Activate the edit mode .
3. Double-click in the **Calendar** cell to be modified.
4. In the dropdown box, select the new calendar.
The new calendar is displayed in **bold** to indicate it has not been inherited from the process main calendar.
5. Save.
The forecast dates are then automatically recalculated.

E.g.:



Name	Bypassed	Predecessor(s)	Calendar	Schedule
Initial Lifecycle State			Enterprise Calendar	
task_001	-	Initial Lifecycle State	Enterprise Calendar	
task_002	-	Initial Lifecycle State	Enterprise Calendar	
LCS100		task_002 task_001	CalendarAsia	
task_101	-	LCS100	Enterprise Calendar	




11.3 Editing in My To Do List

11.3.1 To modify the status of a step in My To Do List

Steps can be validated in **My To Do List**; validation can be performed as a batch.



- In **My To Do List**, only the lifecycle states that can be validated are displayed (i.e. those for which all the required tasks are done).
- A lifecycle state with the status **Validated** no longer appears by default in **My To Do List** (unless a filter is applied). Similarly, a task with the status **Done** no longer appears by default in **My To Do List** (unless a filter is applied).
- The validation date cannot be modified on a **Validated** lifecycle state or on a task that is **Done**.

1. Open **My To Do List**.
2. Select the step(s) to edit. Batch editing of several steps is possible. Filter if necessary. (See [Configuring the To Do List display](#))
3. Click on  to enter edit mode.
4. In the edit dialog box, indicate:
 - The **Status**:
 - For a lifecycle state: toggle to **Validated**  or not validated .
 - For a task: choose the new status from the list: **To Do**, **Done** or **Ongoing**.
 - The **Validation date**.
By default the validation date is the current day's date. You can still enter a date in the past.
 - You can enter a **Comment** and format it when editing a single task.
5. Save.



Validation causes the forecast dates of the schedule to be recalculated.
Once validated the task disappears from **My To Do List**.

Validating several tasks at once


The screenshot shows a task management interface with a list of tasks. Three tasks are selected, indicated by checkmarks in the left margin. An 'Edit' dialog box is open, showing the 'Status' dropdown set to 'To Do'. The dialog also includes fields for 'Validation Date' and 'Comments', and 'Save' and 'Cancel' buttons. The background shows a task list with dates and task names like 'LCS1', 'Task2', and 'Task3'.

Validating a single task

The screenshot shows a task management interface with a single task selected. An 'Edit' dialog box is open, showing the 'Status' dropdown set to 'To Do'. The dialog also includes fields for 'Validation Date' and 'Comments', and 'Save' and 'Cancel' buttons. The background shows a task list with a date and task name like '06' and 'To Do'.

12. RECEIVING EMAIL NOTIFICATIONS

Two types of email can be sent:

- Daily email: giving notification of **overdue** actions to be performed on the subsets
 - Weekly email: giving notification of actions **not yet carried out**
1. Click on the **User** link in the top right corner of the Fashion PLM screen.
A screenshot of the top right corner of the Fashion PLM screen. It shows a session expiration notice: "Your session expires in: 2 H 27 min" followed by a blue-bordered box containing "User: root". To the right of this box are three links: "Home | Help | Logout".
 2. In the **Notifications** area, check:
 - **Receive list of overdue actions by email once a day** to be warned by email of overdue actions to be carried out on the subsets.
 - **Receive list of actions by email once a week** to be warned by email of the actions not yet carried out in all schedules, whether overdue or not.



Certain items are configurable on installation:

- maximum number of actions in the list
- frequency of sending the email (date/time/recurrence)
- email subject
- etc.

13. EXCEL EXPORTS OF THE DATA ASSOCIATED WITH THE SCHEDULES

To make it possible to work in Microsoft Excel on the data associated with the subset schedules, the data can be exported in CSV/Excel format.

The exported data will be the data that appears in the Subset explorer.



The Subset explorer can be configured (see [Configuring the Subsets explorer view](#) above), so it is possible to export only selected data.

If any sub-columns are not displayed because the column they are in is condensed, the data in these sub-columns will still be exported.

The export will be done without any graphics.

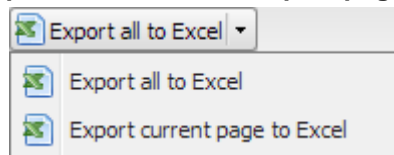
The **Document** column (image, file) will be exported in the form of the document name. A hypertext link will enable it to be downloaded.

Two export options are offered:

- **Export all to Excel:** the data for all assortments in the results area of the assortment explorer will be exported.
- **Export page to Excel:** only the data for the assortments on that page will be exported.

Exporting data to Excel format:

3. Display the assortments you want to export.
4. Click on **Export all to Excel** or **Export page to Excel** depending on the type of export you




want to do:

5. Wait while the Excel file is generated, then open or save the file, as needed.




14. GRAPHICS CHARTER

14.1 My To Do List


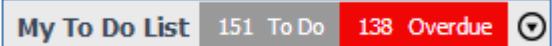
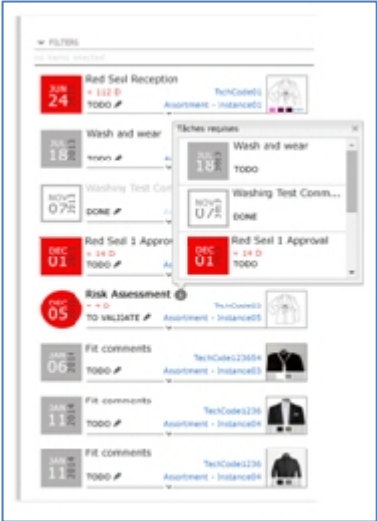
14.1.1 Concepts

	Task
	Lifecycle state

14.1.2 Statuses



	To Do
	Overdue
	Done

14.1.3 Views








Condensed view	
Semi-condensed view	
Expanded view	

14.1 Subset explorer

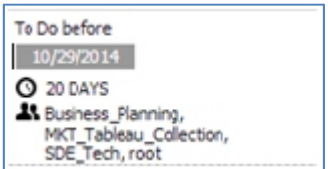
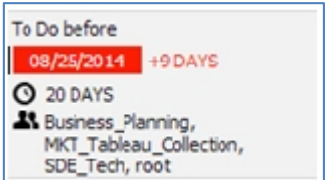
14.1.1 Concepts

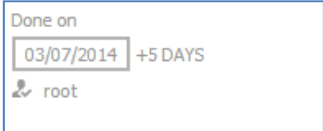
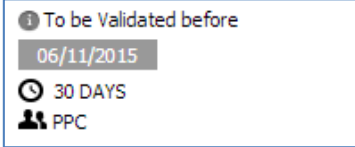

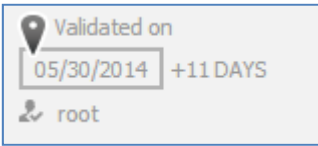
	Task
	Lifecycle state
<p>I AM A LIFECYCLE STATE (BOLD)</p> <p>I AM A TASK (REGULAR)</p>	Distinction between a task and a lifecycle state

14.1.2 Icons

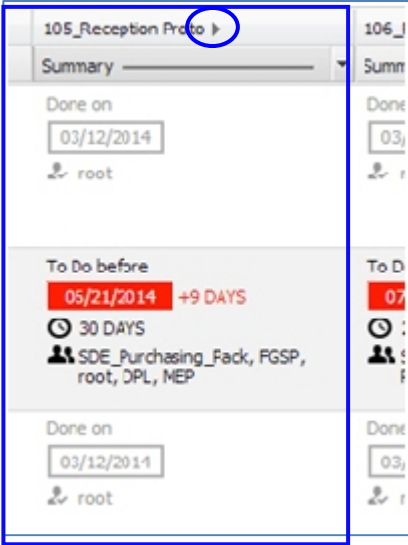
	Current lifecycle state
	Resources
	Person responsible for validation
	User who bypassed the task
	Duration
	Step on critical path
	Alert (the constraint date has been ignored for the scheduling because some steps are overlapping)

14.1.3 Summary view

	<p>Task to be done</p> <p> : the task is on the critical path</p>
	<p>Task to be done (overdue)</p> <p><i>The forecast finish date is on a red background : late</i></p> <p><i>The number of days overdue is specified</i></p> <p> : the task is on the critical path</p>

	<p>Task done</p> <p><i>The forecast finish date is grayed out</i></p> <p><i>The name of the person responsible for validation is specified</i></p>
	<p>Lifecycle state to be validated</p>
	<p>Lifecycle state to be validated (overdue)</p> <p>i: indicates tasks on which this lifecycle state depends</p> <p><i>The forecast finish date is on a red background</i></p> <p><i>The number of days overdue is specified</i></p> <p> : the lifecycle state is on the critical path</p>
	<p>Validated lifecycle state</p> <p><i>The forecast finish date is grayed out</i></p> <p><i>The name of the person responsible for validation is specified</i></p>

14.1.4 Condensed and expanded views of columns

<p>Condensed view</p>	
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Expanded view

105_Reception Prot... 4

Summary	Bypassed	Duration...	Forecast Fin...	Predecessor(s)
Done on <input type="text" value="03/12/20:4"/> root	--	10	03/19/2014	104_Selection natier 102_Pattern sending
To Do before 06/21/2014 +9 DAYS 30 DAYS DPL, FGSP, MEP, SDE_Purchasing_Pack, root	--	30	06/30/2014	104_Selection natier 102_Pattern sending
Done on <input type="text" value="03/12/20:4"/> root	--	10	03/19/2014	104_Selection natier 102_Pattern sending

14.2 Time & Actions

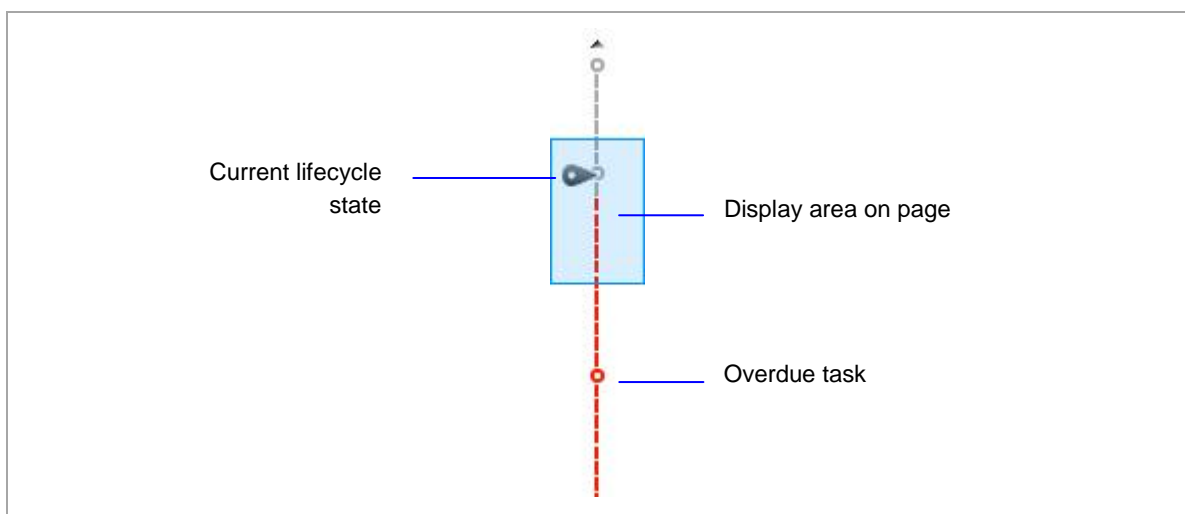
14.2.1 Concepts

	Task
	Lifecycle state
I AM A LIFECYCLE STATE (BOLD) I AM A TASK (REGULAR) I AM A LIFECYCLE STATE DONE (BOLD) I AM A TASK DONE (REGULAR)	Distinction between a task and a lifecycle state
	Current lifecycle state
	Lifecycle state
03/29/2015 (BOLD)	Entered constraint date
03/29/2015	Calculated date

14.2.2 Illustration

Name	Scheduled Fin.	Forecast Fin.	Duration	Resource(s)	Resource Type	Status	To Relo	Validation
401_Stand over +9D To Do - CPU, root, CPL	12/04/2014	12/14/2014	+9	1 DPL POSP	resourceType	To be Validated		
402_Black Seal order +9D To Do - CPU, root	12/04/2014	12/17/2014	+9	3 OPP DPL root	resourceType01	To Do	=	
403_Black seal reception +9D To Do - CPU, root	12/04/2014	12/20/2014	+9	2 OPP root	resourceType02	To Do	=	
404_Pack in house +9D To Do - CPU, root	12/04/2014	12/23/2014	+9	13 OPP root	resourceType03	To Do	=	
404_Pack in house +9D To Do - CPU, root	12/04/2014	12/23/2014	+9	10 resource_CPL MEP	resourceType	To be Validated		
404_Pack in house +9D To Do - CPU, root	12/04/2014	12/23/2014	+9	10 HPP DPL	resourceType	To be Validated		

14.2.3 Navigation bar



14.3 Tables

	Editable cell
	Modified cell (unsaved)
	Cell containing error
	Row containing error
	Row containing an alert

15. GLOSSARY

Backward scheduling: scheduling on the basis of the finish date

Baseline: schedule used as a comparison to determine any deviations

Bypassed Task: indicates that the task is not necessary for current development and can therefore be bypassed, or that the task is blocking the progress of an urgent process and it can be momentarily bypassed. A bypassed task is no longer counted in the date calculation.

Company calendar: calendar defining working days and non-working days

Constraint Date: start or finish date entered by the user. These constraints are useful when you need to make predictions while taking into account external factors (availability of resources or equipment, planned event...)

Critical Task: A task that must be completed on schedule for the project to finish on time. If a critical task is delayed, the project completion date can also be delayed. A series of critical tasks makes up a project's critical path.

Critical path: path running from the start to the end of a logical network such that its duration longer than that of any other path: it is the minimum time to reach the final event. The critical path consists of tasks with zero margin, known as critical tasks.

Delay: time difference between two dates, measured on the project calendar

Duration: time necessary to complete a task. Time difference measured on the project calendar between the start event and the finish event of one action and the start of the next. It is defined in the process and can be edited.

Forecasted Finish Date: date calculated by the system that takes into account the actual development progress (date, steps performed ...)

Lifecycle State: Throughout its development, a product goes through different **Lifecycle States**. These states indicate the stage of development of a product.

Notification: message sent to a user or group of users. It provides information on the execution of a step. It can be sent by email or displayed on the user's home page in the Notification section.

Overdue: difference measured in working days between the planned date of an event and the date on which it takes place

Predecessor: task that has to be completed before the start of the task in question. Predecessor and successor tasks are linked by a logical link.

Process: A process describes in sequence a set of actions that have to be carried out to develop a product. These logical tasks are accompanied by schedule data and allocated resources.

Progress status: indication of the physical progress of a project or part of a project

Resource: User assigned to perform the step

Schedule: Plan the development of a product

Scheduled Finish Date: theoretical planning. It is the objective schedule of the product, calculated during the scheduling process.

Step: an action of the process that can either be a life cycle state or a task

Subset: Grouping of the variations of a product with the same characteristics (size, color, supplier). Allows the application to assign quantities and distributions as well as Calendar Management monitoring.

Successor: task that has to come after the task in question

Task: a task is a particular job allocated to a unique entity, which ends with the production of a deliverable. The task is the smallest element of a production schedule

ToDoList: is a reminder of all the steps to be done that are scheduled in the Process. The ToDoList actions will appear on the assigned user's Home page in the Product Developer. It shows the tasks assigned to the specific user in the specific product.

Validation date: date of validation of the task or the lifecycle state