

Conventions Used

The following typographic conventions are used throughout this course:

- Bold orange text denotes the name of a tool, tool option, icon, button, window option, object names, element names, items in the tree, or items in a product structure.
- Bold text within a sentence is used to apply emphasis on key words.
- Text enclosed in [brackets] corresponds to the text that must be entered into a text field of a dialog box or prompt.
- ▶ Text enclosed in <chevrons> corresponds to keystrokes.

Example:

Use the following steps to create a new document:

- 1. In the top menu bar
- a. Click Add > Content...



d. Press <Ctrl+S> to save the document.

Issue Management







Issue Management in	Job Aid	
	2 – Manage Program and Business	Market Market Market Barket Market Barket
Level 2 – Process Group	 2.1 – Program Management 2.2 – Business Management 	
Level 3 – Process	Capability: 2.1.1 – Program Planning Process: 2-1-1 – Plan Program Capability: 2.1.2 – Program Execution Process: 2-1-2 – Execute Program	
Level 4 – Activity	 2-1-1-X – Establish Issue Categories 2-1-2-X – Manage Issues, Categorize Issues, Disposition Issues, Corrective Plan, Perform Corr Close Issue 	rection, Review &
Level 5 Task	This would represent user level task steps.	
Issue Management		



Definitions – Issue Job Aid	
 An issue is a problem or threat that has happened, is happening, or has 100% probability of happening. It is something that will affect the program's ability to meet its cost, schedule, performance, or other objectives. Issues are used to report unintended content or discrepancies that are in the process of being validated, or may have been left undetected after validation was completed. Issue reports allow non-owners who are reviewing the reported content to provide feedback to the owner, who can then make changes to correct the issue. Issues must be linked to another object in 3DEXPERIENCE (e.g., Part, Document, Project, etc.). This is recorded in the Reported Against field. Issues in this context are general problems/requests and a means of reporting and resolving those issues. It is not to be confused with Issues in the context of Risk Management where an Issue is a Realized Risk. Issues can be created and managed with the following Social and Collaborative apps: Collaboration and Approvals and Issue Management. 	
Issue Management	







L	₋ocate Existi	ing Issues								Job A	id 📕
	 Open the Expand th View the is 	north quadrant of e Collaboration a ssues assigned ar	the con and App and owne	npass, and provals dro ed by the us	bllaboratio enu, and cli sues Sum	n and App ck Issues 3 mary pane	rovals app Summary. I.	р. [Сој	PINOVIA ENOVIA		
	1 SDEXPER	IENCE Collaboration and Approv	als Search	1	Q	\$			Student DesignEngineer Training ~	• • + #	6) (2) (1)
	Change Management	Issues Summary									< >
(2)	 Collaboration and Approvals 	* & × Q.	. .		≧ %-						
	Home Dashboard				2.00		Estimated				
	Issues Summary	Name 3 E	dit 👩	a 🔒	Туре	Description	Start	Finish	Owner	Priority	0
	Issue Categories	SS-LMOCEQA-0000		ə 🕈	Issue	Active	Jan 21, 2020	Feb 6, 2020	Student DesignEn	Low	
	Collections	SS-LMOCEQA-0000	. 6	ə •	Issue	Active	Jan 28, 2020	Feb 8, 2020	Student DesignEn	Medium	
	Companies	SS-LMOCEQA-0000		ə 🔶	Issue	In Progress	Jan 28, 2020	Jan 31, 2020	Student DesignEn	Medium	
	 Utilities 										
	Issue Management										









Review an Issue		Job Aid
When you have an existing issue, you mus During this process, you can review the info	t review it before you can take the steps to resolve ormation attached to an issue.	and close the issue.
The information attached to an issue is cruc information provided for all users involved.	cial in deciding how to best solve the problem and t	o decide if there is enough
 If there is not enough information, then you such as: Adding a reference document to the issue Adding reported items to the issue Promoting the issue Assigning a user to the issue Assigning tasks to the issue During this stage, you can also decide to can be added and the issue 	can use the review stage to pinpoint what is missin ue reate a new issue that better addresses the problem	ng and plan the next steps, n.
Issue Management	LOCKHEED MARTIN PROPRIETARY INFORMATION	LOCKHEED MARTIN 7 P. 12



Review an Issue (cont.) Job Aid Review the issue with the following tabs: 2. a. Properties: attributes that define and categorize the ISS-LMOCEQA-0000022 issue. b Issue 2.b b. Assignees: users that help resolve the issue. ISS-LM 2.a Assignees Properties . 2% 🗔 🕞 🖬 • 💷 • 2 2 c. Reported Against: puts the issue in context of other Reference Docu Name ISS-LMOCEO П Туре Name . User Nam Reported Against objects on the platform. Links the issue to another Туре lssue Resolved By ctive Descrip State object in the platform (e.g., Part, Document, Project, Resolved Items Creat Routes Last State Change Jan 28, 2020 etc.). Student Desi Student Desi Owner Originator Discu d. Resolved by: defines another platform object used Lifecycle Originated Date Modified Date Jan 28, 2020 to resolve the Issue (for example, a Change Object). Jan 28, 2020 Vaiting On Una e. Reference Documents: documents attached to the No Escalation Required issue that provide necessary information. Walt On Date Estimated Start Jan 21, 2020 Estimated Finis Feb 6, 2020 Internal Actua 2.c < (2.d 2.e Reported Ag - -同點 22. 🔲 Name 🔺 Rev De prd-LMC Physical Produc < > Issue Management





Create a New Issue	Job Aid			
 In 3DEXPERIENCE, Problem Reporting is done through the use of an Issue. After you review a problem and identify that there is not an existing issue in place to solve the problem, then you must create a new issue. After planning is completed during the review stage, you can add the required information when you create a new issue. Problems/Issues must be linked to another object in 3DEXPERIENCE (e.g., Part, Document, Project, etc.). This is recorded in the Reported Against field. 	Create New Issue			
Note: If the issue is created in context of another object, then the Reported Against field will be automatically populated.	Reported Against prd-DSLMQA-00001158 Escalation Required			
It is important to describe the problem and the Steps to Reproduce accurately so the responsible person can reproduce and resolve the issue.	Yes No OK Apply Close			
Issue Management				



Dashboard. 2. Click the Projects tab. 3. Select Training Project 2.					Project 2 is used, but you can use any project to fit your scenario.				g	
	3DEXPER	RIENCE ENOVIA Collaboration an	d Approvals				Search		۵ 🛇	
	Change Management	change Management A Home								
	My Changes Collaboration and Approvals	New Docs Changed Do	cs My Recent Doc	s My Training	s Collection	s Projects				
1	Home Dashboard	🗌 Name 🔺	Current Phase	Туре	Status	Owner	Collaborative Space	Estimated Finish Date	Actual Finish Date	Originated
	Issues Summary	P-0000106		Project Space	Preliminary	Student Projec	Training	Oct 11, 2019		Oct 11, 2019
	Collections	P-0000112		Project Space	Preliminary	Student Projec	Training	Nov 4, 2019		Oct 25, 2019
	Companies	Tech Exploration Project		Project Space	Preliminary	Student Contr	Training	Dec 13, 2019		Oct 23, 2019
	- Utilities 3	Training Project 2	-	Project Space	Preliminary	Student Projec	Training	Oct 31, 2019		Oct 25, 2019
	System Data	Training_Design and Bui		Project Space	In Work	Student ROMa	Training	Oct 11, 2019		Oct 11, 2019
	Database Analysis	TrainingProject-2019103		Project Space	In Work	Student Projec	Training	Nov 14, 2019		Oct 30, 2019



Cre	eate a New I	ssue (cont.)		Job Aid
7. 8. 9. 10. 11.	Fill out the iss Click the ellip Choose the C Click Done. Click OK.	sue's required information. uses to add a Category/Classification. Category/Classification.	7 Training Project 2/Create Ne Pro: - Instance of bits as required Type Insue Description Missing relationship between datum Excel and a Physical Product. Reported Against Training Project 2 Escalaton Required No No Striss	Co-owners Clean Problem Type Resolution Recommendation Owner of datum file needs to link the file to the physical product. Steps to Reproduce Check "Where Used" within document. Check "Where Used" within document. Check Type Classification Product Related/Engine
	Category/Classification		Estimated Start Jan 28, 2020	Lockheed Martin
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	Name 🔺	Description	Priority	Missing Beterence to Phy
	Product Related	Problems/Issues related to the product under development.	Medium 🕑	(11) OK Apply Close
9	Other PR	Issues related to the engineering of the product.		
	○ Manufacturing	Issues related to Manufacturing problems		
	Program Management	Problems/Issues related to Program Management including thing		
	< >	5 objects, 1 selected 10 Coxe Cancel		
lssu	ie Management			

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Lifecycle	Originator	Stude	ent DesignEngineer1					
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	Modified Date	Jan 2	Jan 28, 2020					
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	🔲 Name 🔺		Revisior Type Description		2	State	Owner	
	TT E) Training Pr	niect 2	21572 Project Space Training Project created from	Temp	ate P	reliminary	ProjectManager1	

Add a Referen	ce Document to the Issue	Job Aid
 To add a refe Expand the A Click Create 	rence document to the issue, select Reference Documents . Actions menu. New > Document.	
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Issue Management		

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Edit the Issue's Reference Document (cont.)	Job Aid
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issue Management	Alient JOCAPU REFACE platform

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	Issue Management						
31							

Add Reported Items to the Issue	Job Aid
In this scenario, there are two objects involved with the issue: an excel document and a physical product as must attach these items to the issue to maintain the digital thread, as well as make quick references to the the issue.	ssembly. You user receiving
 In the Issue Main/Properties page, click Reported Against. Click Add. Select the necessary objects. Click OK 1 of 4309 Results () 3 6 DE1 DRONE Princip Product Revision.1 Mainty State in Work Stated Despet Engineer 81/25/252 Princip Product Revision.1 Mainty State in Work Stated Despet Engineer 81/25/252	() [Tarineg Collaborative Spaces
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Issue Management	

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Assign Tasks to the Issue	Job Aid
There are two sources of Tasks in 3DEXPERIENCE: Routes and Projects.	
 A Route represents a workflow made up of Tasks. Routes are used to accomplish a business activity by as to one or more persons. There are three (3) types of Tasks that can be associated with Routes: Approval Comment Notify Only Route Tasks will be discussed in the following slides. A Project also contains a schedule made up of Tasks, Milestones, and Gates, which ultimately work togeth accomplish a stated goal or objective. Unlike Routes, Projects have a variety of other information and functionality associated with them, including Management, Risk and Opportunity assessment, and Financial information. Project Management (and Project Tasks) will be discussed in a separate course. 	signing work her to I Issue
Issue Management	



In Step Set Rou Object1	1 of 4: Spec ite Completi	ify Details , fill out ion Action to [Pror	the Description. mote Connected		Step 1 of 4: Specify Add Content	Details Remove Selected		
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-LMOCEQA-0000026 sing Reference to Physical	A ng relation m Excel and	ship between Maturity State : Assig d a Physical Owner : Student Proje	an + Active + Review		Scope	All Organization Select Scope		
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Assign Tasks to the Issue (cont.)	ob Aid
 13. In Step 3 of 4: Define Route Tasks, do the following: a. Add a Title, b. Enter the Instructions. c. Enable Assignee-Set Due Date. d. Task Lisk For Task Lisk For over Selected Assign Selected Select	s Owner Review
Issue Management	

Assign Tasks t	o the Issue (cont.)		Job Aid
16. Select the ne	ew route.		
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	Assignees Name ARoute Status Due Date Description	Owner State Condition	
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Issue Management			

 View the route details and tasks that you assigned to the issue. 	Elitoria Celluboration and Approvals Elitoria Autocopy 40000174 Overer : Student Desgriftingment Autocopy 40000174 Overer : Student Desgriftingment Autocopy 40000174 Overer : Student Desgriftingment
 8. Click Back twice to return to the Issue Main/Properties page. 9. Click the issue section. 9. Click the issue section. 	Prote: tarsa; 2009 05 43 20 44 RLMOCEDA-000174 RLMOCEDA-000174 Repetition Repetitin Repetition Repetitin Repetition Repetitin R
Reference Documents Reported Against Resolved Items Routes Discussions Lifecycle Resolved Items	











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6. Click R	eference Do	cuments.				VIA Collaboration	and Approv	vals	Search	< ⊳ ≡
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(=	D @ prd-LMOCE	QA-000044951	Physical Product	1	In Work	DesignEngineer1	Ð			
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Review and Resolve an Issue	(cont.)		Job Aid
 10. Click Edit. 11. Enter the following: a. Resolution Date b. Action Taken c. Resolution Statement 12. Click Done. 13. Click Back to return to the task. 	Properties Image: Image: I	Collaboration and Approvals Search Standard Search ISS-LMOCEQA-0000026 Missing Reference to Physical Product Issue Image: Collaboration and Approvals Image: Collaboration and Approvals Image: C	
Presentation Name or Footer (Optional)			







Issue Closure		Job Aid
 After the assignee performs the task and approves it for closure, you can then review the user's work to verify that the task is sufficiently complete. Then, you can approve the resolution and close the issue. Once the issue is closed, the problem is solved. 	Student DesignEngineer1 Training ~	+ A O O Restore Default View
Presentation Name or Footer (Optional)		





Review the Issue Res	olution (cont.)		Job Aid
 Click Create Route. In the Create Route p information: Description: [App resolved.] Route Base Purp Route Completion Object 	panel, enter the following roved. The issue has been ose: Approval n Action: Promote Connected	ISS-LMOCEQA-0000 Control Control Cont	D026]Create Route Fields in red latics are required Route AutoName Approved. The issue has been resolved.
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с.	Desc	K Edit. e Step 1 of 2: Add/Edit Tasks panel, enter the wing: Title: [Approve if the Issue is Resolved] Action: Approve Bescription: [Approve if the issue is resolved.] nable Assignee Set Due Date nable Allow Delegation K Next. Step 2 of 2: Action Required Step 2 of 2: Action Required Approve if the Issue is Approve Image: Action Required Previous Title, Action Image: Action Required	is resolved.]		Training		Lockheed Martin	Credential	All	Primary	
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				Step 1 of 2: Add/Edit Add Task Sort Task I	Tasks List Remove Selected A	ssign Selected	}}. }}•			Per	DesignEngin
	Step 2	of 2: Action Required		Title, Action & O	rder Assignee & Instruc	ctions	Due	Date & Time			
	*			11.a Approve if the Iss	Student DesignEngir	neer1 🗸 🔯	Due Date & Time				
	Order	Name	Action Required	Action Approve () Order	Approve if the issue	is resolved.	Adva 11.d	anced day(s) fro	m Route Start Date		
	1	Approve if the Issue is Resolved	Approve	1 💌		(*	11.e ☑ A	ssignee-Set Due D	ate Requires Owr	or Review	
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