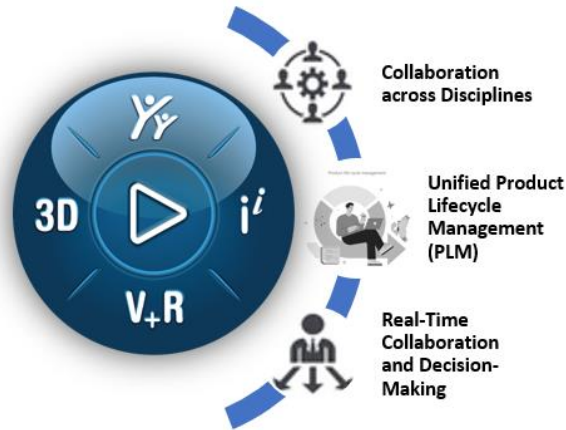# BEACON Newsletter - August 2024

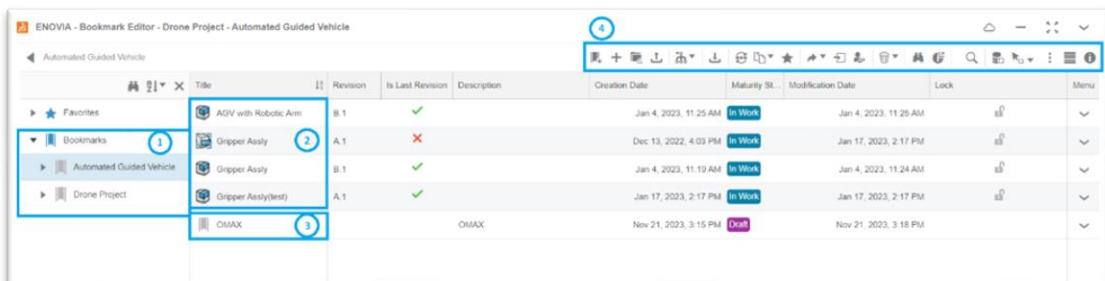## Unlocking Potential: The Collaborative Revolution with Industry Innovator

Introduction:

➢ The 3DEXPERIENCE platform by Dassault Systèmes is a comprehensive business solution designed to transform and streamline the product development process. Offering a unified digital environment, it enables organizations to manage the entire product lifecycle, from conceptualization to manufacturing and beyond.

➢ With intuitive collaboration tools, real-time data access, and advanced project management capabilities, the 3DEXPERIENCE platform empowers cross-disciplinary teams to work seamlessly. This cloud-based platform integrates powerful applications for design, simulation, and collaboration, fostering innovation and accelerating time-to-market.

➢ In essence, it provides a holistic and efficient approach to product development, bringing together people, processes, and data in a unified digital ecosystem.

➢ Moreover, with access to real-time insights and analytics, decision-makers can make informed choices, optimizing resource allocation and mitigating risks effectively. As a result, the platform not only accelerates time-to-market but also enhances product quality and customer satisfaction. By embracing cutting-edge technologies and best practices, the 3DEXPERIENCE platform empowers businesses to stay ahead in today's dynamic marketplace, driving continuous improvement and sustainable growth.

➤ Unlock seamless collaboration and streamline design processes effortlessly with a wide range of user-friendly cloud-based applications. These are some of the tools that empower teams to collaborate efficiently while managing the intricacies of the design workflow with ease. Tools which we are going to cover are as follows:

1. **Bookmark Editor:** Refine your data organization with our Bookmark Editor app, offering an intuitive folder structure that enhances accessibility and simplifies the categorization of essential information.

2. **Collaborative Tasks:** Effortlessly allocate and track tasks assigned to individuals or groups, that can be associated with necessary files and project information.

3. **Collaborative Lifecycle:** Effortlessly generate and manage revisions or branch revision / products, overseeing their lifecycle seamlessly from a centralized ecosystem.

4. **Route Management:** Establish a well-defined pathway for non-disputable workflows within your approval process.
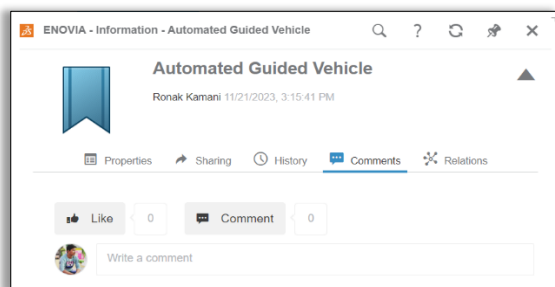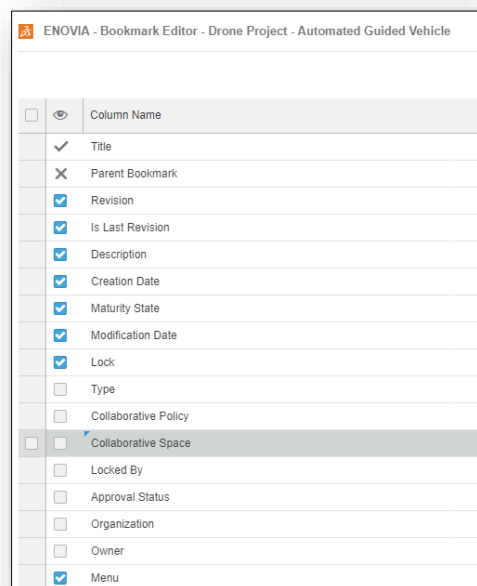
1. BOOKMARK EDITOR:

Sr. No.	Name	Description
1	Root Bookmark	Root bookmarks encompass both bookmarks and their contents.
2	Bookmark Content	Bookmarks house other bookmarks within a folder structure, offering the flexibility to add new or existing content to each bookmark.
3	Bookmark	We have the freedom to incorporate any type of content, and the content within a bookmark can reside in any collaborative space where the user holds permission.
4	Bookmark Tools	It provides an array of tools for modifying bookmark maturity, ownership, and more. Additionally, users can choose from 15 different attributes to customize their columns.

Usage:

- The Bookmark Editor is conveniently accessible directly from the compass. We can easily locate it by searching within the Collaborative Industry Innovator role or directly in the search lens icon inside the Compass.

- To create a new bookmark, click on the "New Bookmark 📑₊ " button within the Bookmark Tools interface. Enter a title for the bookmark and relevant 3DSpace. Optionally, we can add description to organize our bookmark just like we do with folder structure.

- Once we've created a bookmark, we can add content to it. This content can include links to documents, web pages, project files, or any other relevant resources. Click on the bookmark we've created to open it. Look for an option to "Add Content ＋ 🗂 ⬆ ". Search for the type of content we want to add (e.g., document, web link, image) on the platform and follow the prompts to upload or link to the content.

- Customize attributes or metadata for each bookmark as needed.

- Options include adding tags, assigning, or transferring ownership, setting maturity levels, and specifying other attributes.

- This customization aids in effectively classifying and managing bookmarks.
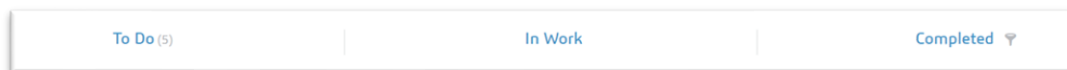

- The Bookmark Editor also include collaboration features such as the ability to share bookmarks with specific users or groups, leave comments on bookmarks, or track bookmark activity and updates using the history tab.
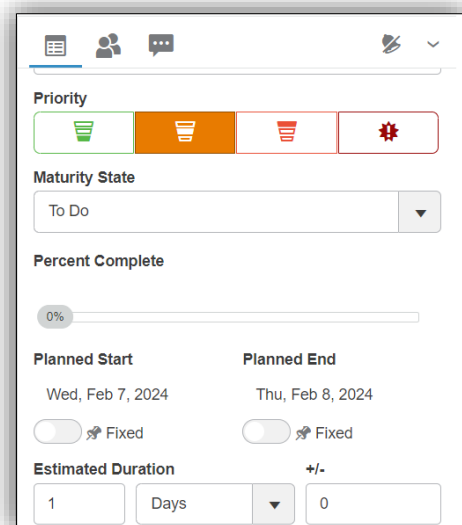
- In conclusion, the Bookmark Editor offers a user-friendly and efficient solution for organizing and accessing essential information within the 3DEXPERIENCE platform. With its intuitive interface and seamless integration, users can effortlessly manage bookmarks, collaborate effectively, and streamline their workflows. Whether it's organizing project resources, sharing critical information, or enhancing productivity, the Bookmark Editor empowers users to navigate their digital ecosystem with precision and ease.
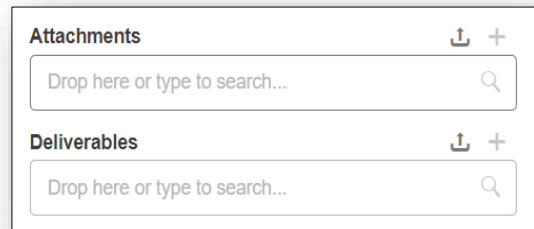
2. Collaborative Tasks:

➢ A dynamic tool designed to revolutionize teamwork and project management within the 3DEXPERIENCE platform. With Collaborative Tasks, users can seamlessly coordinate activities, assign responsibilities, and track progress in real-time, fostering greater collaboration and productivity across teams. Say goodbye to siloed workflows and hello to streamlined teamwork with Collaborative Tasks.
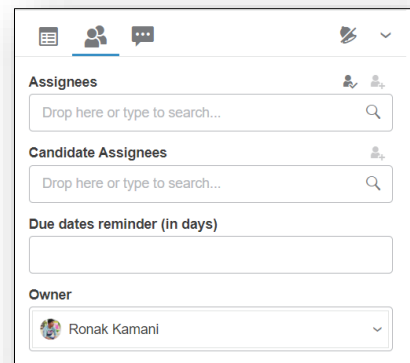

➢ The Collaborative Task app is divided into three stages: To Do, In Work, and Completed, as depicted above. Users have easy access to tasks assigned to them directly from the main page of the Collaborative Tasks app, ensuring seamless task management and progress tracking.

➢ Task creators can assign priority levels based on task urgency.
➢ This provides clarity to assignees regarding task order.
➢ The streamlined process eliminates the need for emails or messaging platforms in the design process.
➢ Task creators can set specific dates aligned with the project's end date.
➢ Alternatively, they can define estimated durations for task completion, ensuring efficient project scheduling.

- The attachments section in tasks facilitates easy attachment of files of any format and size.
- This feature eliminates the need for assigners to meticulously mention specific files or revisions for assignees to work on.
- The deliverables section enables assignees to submit their completed work, supporting various file formats including 3D CAD extensions, PDFs, and Excel files, ensuring flexibility in document submission.

- Collaborative tasks allow assignment to individuals, user groups, and routes.
- The platform fills software gaps by enabling self-task assignment, crucial for approval tasks.
- Users can customize notification frequency based on task completion deadlines.
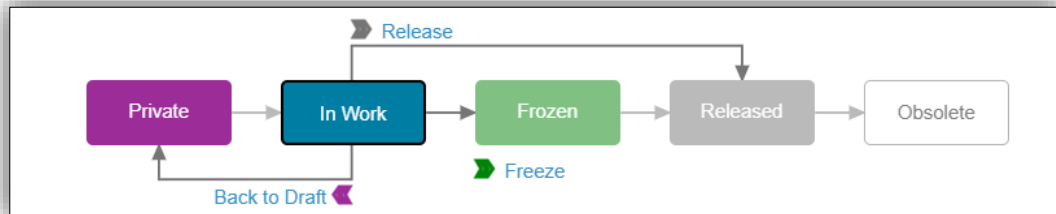
Overview:

- Collaborative tasks within the 3DEXPERIENCE platform revolutionize project management by offering a comprehensive solution for task assignment, tracking, and completion. With the ability to assign tasks to individuals, user groups, or predefined routes, teams can ensure clear delegation of responsibilities and streamlined workflows.

- Real-time progress tracking and customizable notifications empower users to stay informed and proactive, while the seamless attachment of files and documents facilitates efficient collaboration. By prioritizing tasks and setting deadlines, teams can optimize productivity and meet project milestones with confidence. Collaborative tasks are a cornerstone of effective teamwork, promoting transparency, accountability, and success in project execution.

3. Collaborative Lifecycle:

➤ The Collaborative Lifecycle is a web-based application embedded within the platform, offering users the flexibility to review and modify revision and maturity statuses. Unlike conventional solutions, the 3DEXPERIENCE Platform enables users to adjust the maturity of multiple files across various formats, even if they are not part of the same assembly or project.

➤ Maturity states aid colleagues in identifying parts under work or in the approval stage.

➤ They play a crucial role in revision creation.

➤ Transition lines facilitate maturity state transfer.

➤ The platform offers flexibility to create or remove these lines as per design process requirements.

➤ Collaborative Lifecycle app offers comprehensive revision tracking for both new and branch revisions.

➤ Users can create duplicate parts or assemblies to boost design team efficiency.

➤ The app enables easy comparison between different revisions or products.

➤ All features seamlessly integrated within the Collaborative Lifecycle interface.
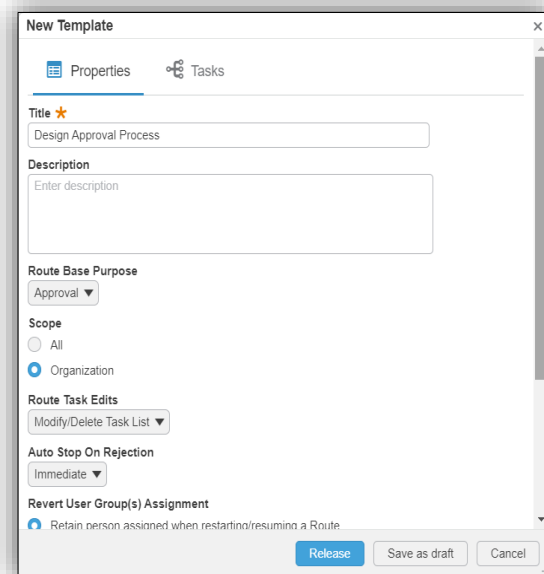

➤ The grey hat indicates that no change action or work under option is currently selected.

➤ Clicking on the hat provides options to choose the correct change action from the list.

➤ Upon selection, the hat turns yellow, indicating that all subsequent changes will be recognized.

➤ Changes are stored in the change action and transferred to the related new revision.

➤ It's important to turn off the hat after completing the changes.
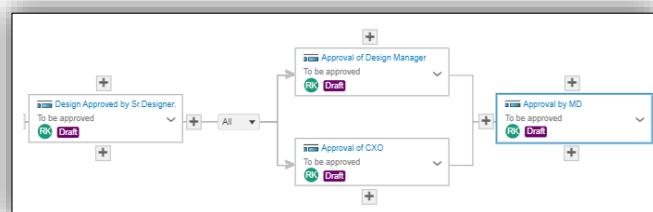
4. Route Management:

- ➢ Introducing Route Management, a powerful feature within the 3DEXPERIENCE platform designed to streamline project workflows and optimize task routing. Route Management empowers organizations to define and manage the flow of tasks, approvals, and information across complex processes with ease. By mapping out predefined routes and decision points, teams can ensure tasks progress efficiently through the project lifecycle, reducing delays and improving overall productivity. Let's explore how Route Management revolutionizes project execution and enhances collaboration within the digital ecosystem.
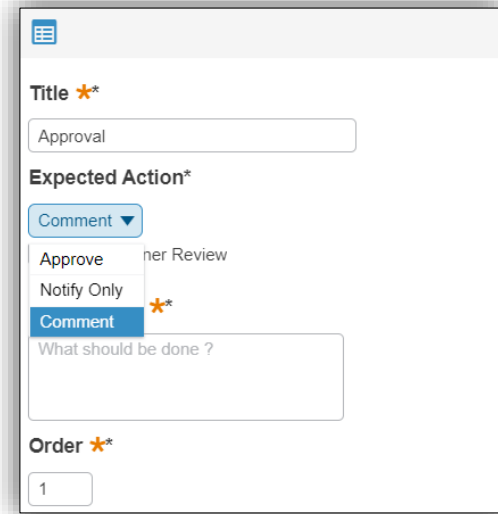
- ➢ Users can start using Route Management by creating a new route or establishing a route template.
- ➢ When creating a route template, only the Title field in the properties tab is mandatory to fill.
- ➢ Other options can be customized based on approval process preferences.
- ➢ Settings can be adjusted later to adapt to evolving needs.
- ➢ Route templates have their own maturity state to ensure smooth operation within the ecosystem.
- ➢ Incomplete or configurable tasks within the route allow saving the template as a draft.
- ➢ Once released, the template is available for use in any approval process.
- ➢ Approval processes can be assigned to individuals, user groups, or route templates for flexibility.
- ➢ Multiple templates can handle various file types, enhancing organizational adaptability and efficiency.

- ➢ Creating a route template involves crafting tasks or workflows.
- ➢ Users have the option to create parallel tasks.
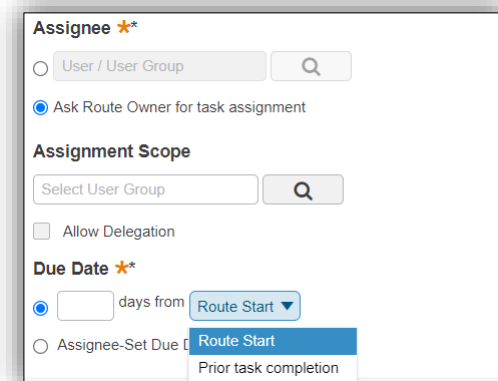- ➢ This feature offers unparalleled flexibility while ensuring workflow continuity.

- Title is a necessary field to be entered when creating tasks inside the route.
- Tasks can be defined in three Categories: Approve, Notify only, and Comment.
- The categories can be adjusted based on the current stage of the product.
- The order of tasks can be easily changed even after creating the workflow.
- The Instructions tab is mandatory to provide insight to the task assignee.
- It allows specifying what tasks they are expected to perform.

- Tasks in the route can be assigned to an individual or a user group.
- Alternatively, if uncertain about the person, the option "Ask Route Owner for Task Assignment" is available.
- This option prompts to enter the scope of assignment at the current stage.
- As the route progresses, assignments can be adjusted accordingly.
- Route Management provides flexibility in setting task due dates.
- The first option enables selecting a set number of days from the start of the route or after the completion of the prior task.
- Alternatively, the second option allows leaving it to the assignee, without restrictions.

- In conclusion, Route Management stands as a pivotal tool within the 3DEXPERIENCE platform, empowering users to orchestrate project workflows with precision and ease. By providing customizable options for task assignment, due dates, and route creation, Route Management enhances efficiency and collaboration across diverse project landscapes. Whether standardizing approval processes or adapting to evolving project

needs, Route Management offers unparalleled flexibility and control. Embracing this feature ensures seamless navigation through project lifecycles, ultimately driving productivity and success within organizations.

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