

# SOLVENTUM

## General PLM Help Document

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## For Additional Information:

For further information, use these Solventum IT Product Lifecycle Management (PLM) resources

Global PLM Resource	How to Access or Contact
Online Documentation	While logged into Global PLM (formerly known as ENOVIA/eMatrix), click  and select Help.
Documentation, Training and Access	Visit <a href="https://plm.solventum.com/plmhelp/">https://plm.solventum.com/plmhelp/</a> To request PLM access, click on the “this form” link under External Supplier Account Requests.
Helpline  For suppliers needing assistance with Password reset who have PLM only access.	1-844-539-0547

## Assistance with Password Reset:

Global PLM Resource	How to Access or Contact
Helpline  For suppliers needing assistance with Password reset who have PLM only access.	1-844-539-0547 (toll-free)

## Solventum PLM Preferred Browser:

PLM preferred browsers are Google Chrome and Microsoft Edge Chromium. The listed internet browsers are in order of usage preference.

Regarding using Mozilla Firefox, this browser does not have full functionality, and usage is not approved by the Solventum Global PLM system.

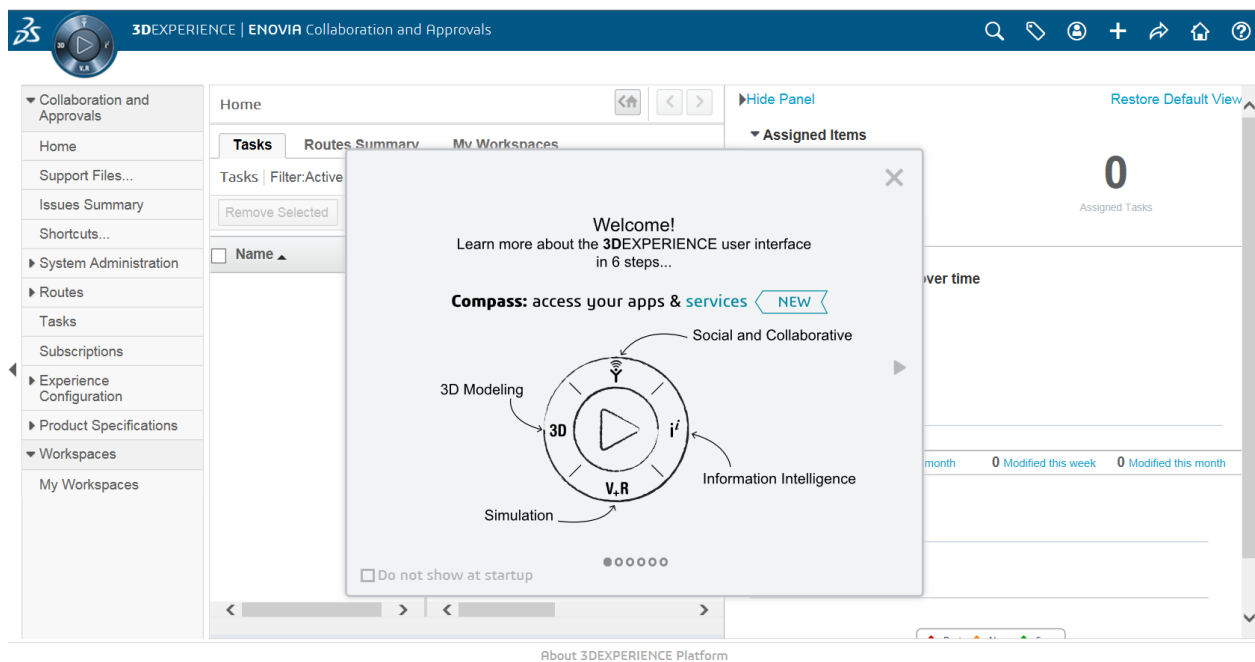
## Global PLM Setup:

Menus display by clicking on an icon in the blue ribbon.

After logging into Solventum PLM for the first time, you will see the Default homepage screen as shown below.

## Welcome Page:

In the lower left corner, click the box to the left of “Do not show at startup”. Then click the “X” in the upper right window to close the Welcome window.

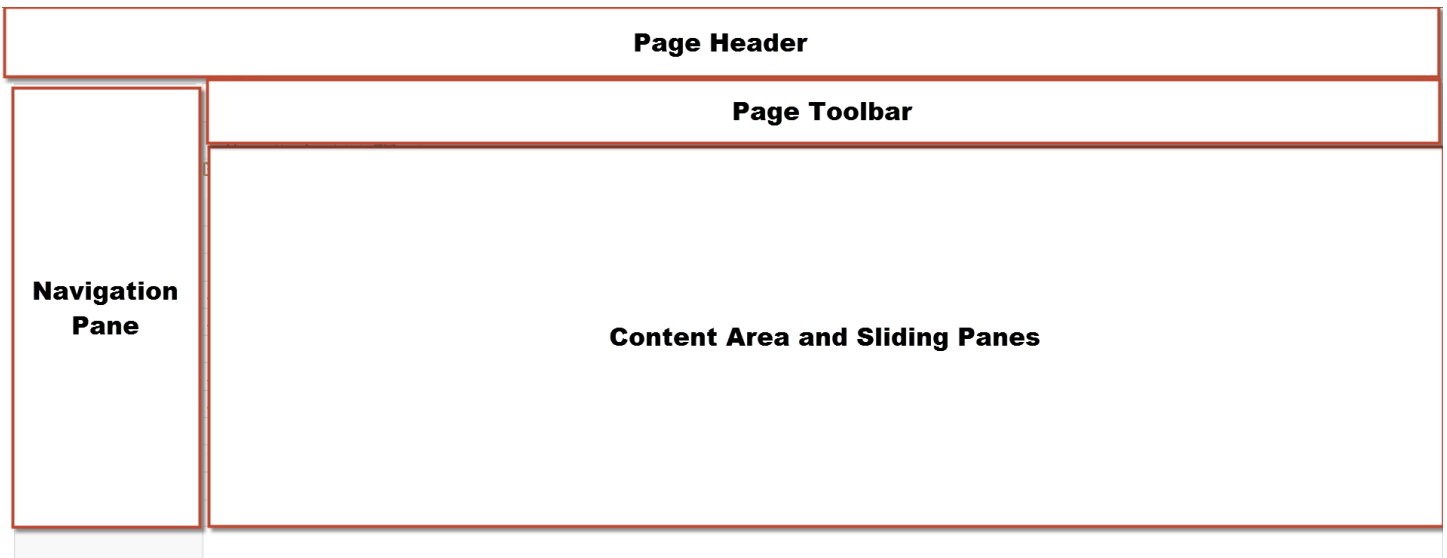


## Assigned Items, Document Updates and Task Due Timeline:

In the upper left corner, click “Hide Panel” to close this panel.

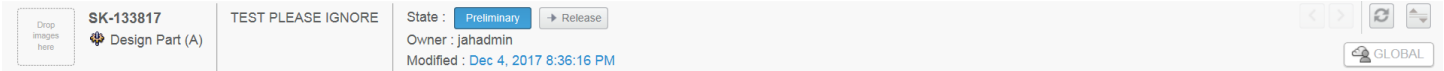
## PLM Object Review Window Display

On the Solventum PLM Review window will display:



### Page Header:

The Page Header displays at the top of the object window that displays the type, name, revision and the object description.



### Page Toolbar:

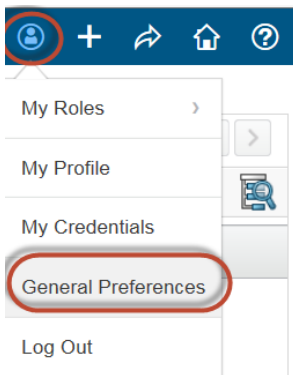
The Page Toolbar contains the menus and icons (buttons) on the top of a given page.

### Preferences Home Page Setup:

You can update the Home Page screen from Default to Tasks or to My Workspaces

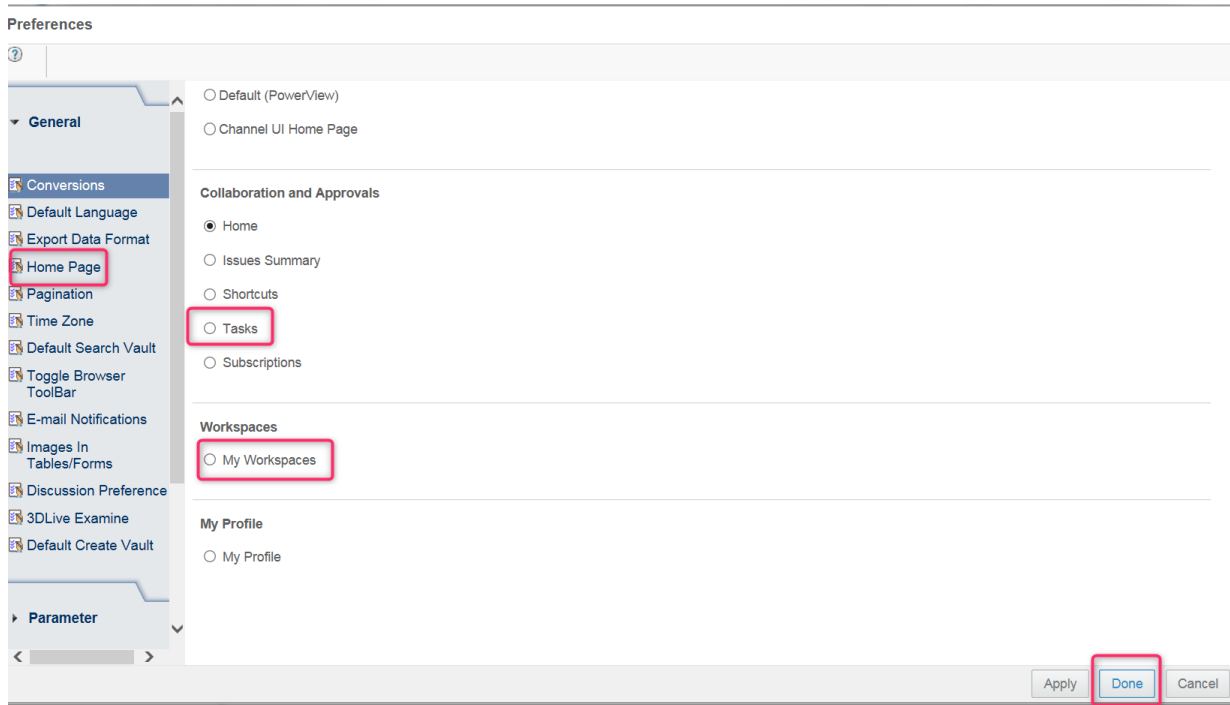
With Tasks as your homepage, when you login, the system will display all your tasks to approve.

Click on the Me icon -  > General Preferences...



Click Home Page in the left panel.

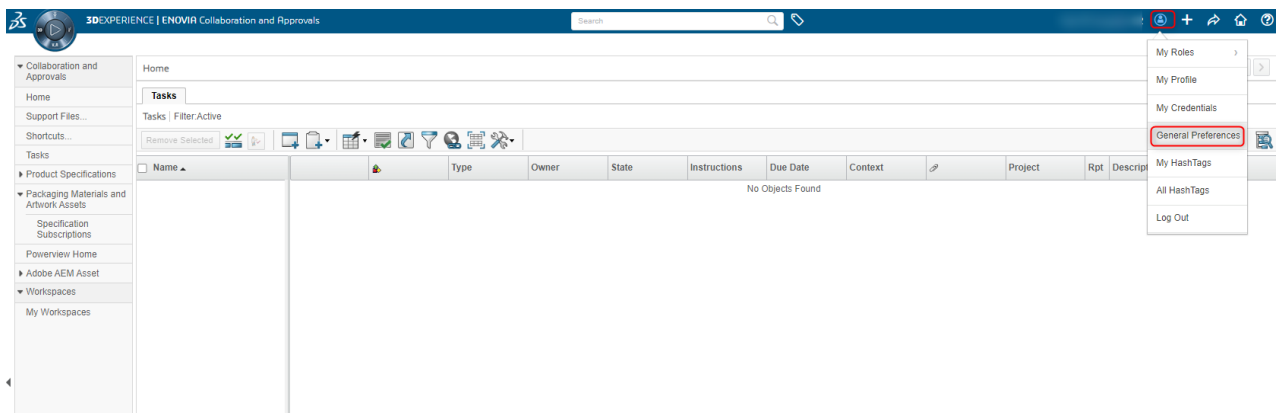
Click the Tasks or My Workspaces and then click “Done” in the lower right corner of the window.

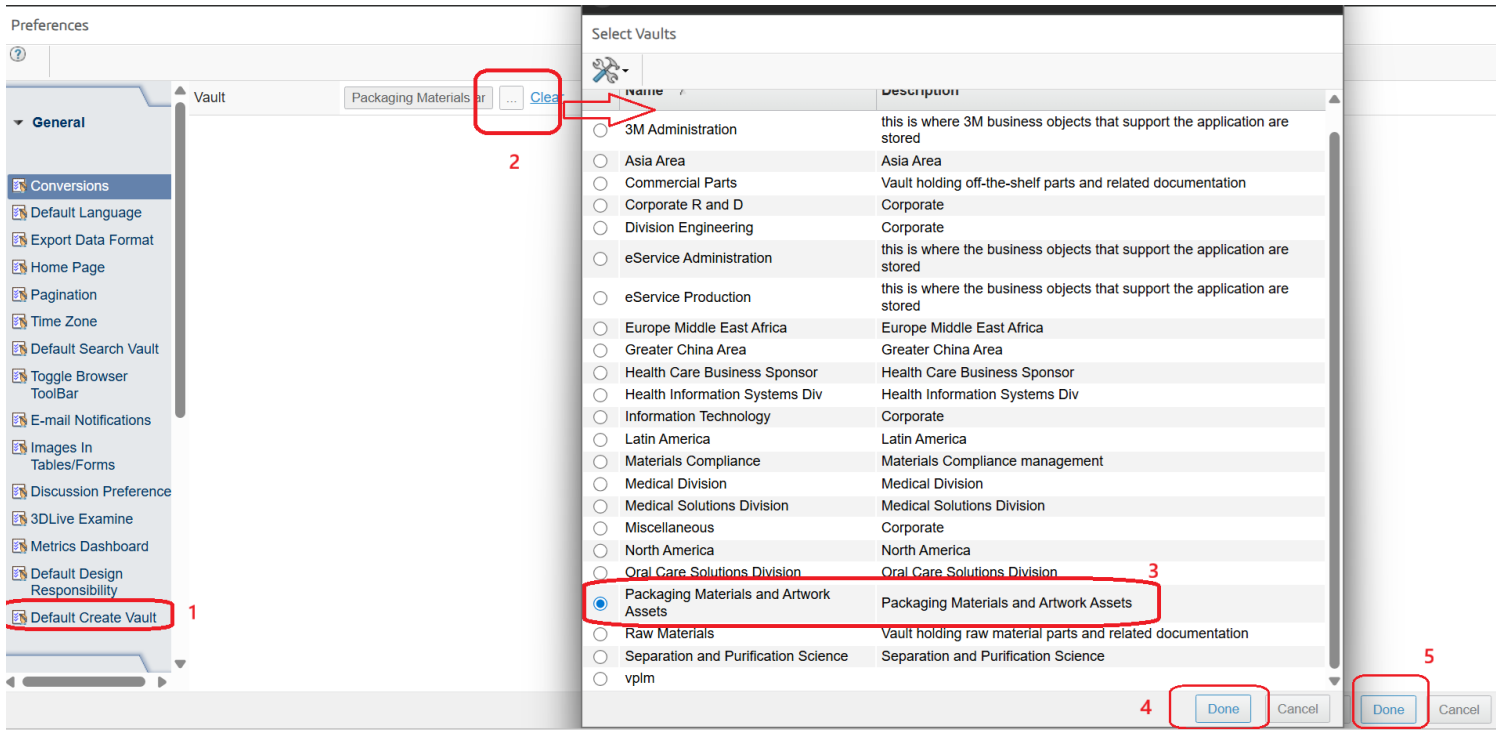



## Setting up Default Create Vault

Note: If you create any data in Solventum PLM (Product Lifecycle Management) system outside of Enterprise Packaging, this setting will set the vault on other create windows to Enterprise Packaging.

To set up the Default Create Vault: click on the ME icon  and select General Preferences from the drop-down menu.







1. Click on 'Default Create Vault' in the left panel.
2. Click on the ellipses button  to the right of the Vault field.
3. Select "Packaging Materials and Artwork Assets".
4. Click Done.
5. Click Done.

## Toolbars/Icons:




























The most obvious change in release 17X is the look of the main page. All menus display by clicking on an icon. The biggest change in 17X is accessing the toolbars.



## PLM Icon Function:








Icon	Icon Label	Function
	ME	<p>Clicking this icon allows access to the user's My Roles, My Profile, My Credentials, General Preferences and Log Out My Roles and My Credentials are not accessed by Suppliers to Solventum</p> <p><b>My Profile:</b> For <b>any Name changes or updates to e-mail please call 1-844-539-0547</b></p> <p><b>General Preferences:</b> Allows the user to set the Home Page to Tasks or to My Workspaces.</p> <p><b>Logout:</b> Logs the user out of the Global PLM system</p>
	Add	This is the new Create Menu. This is not available to Suppliers to Solventum

## PLM Icon Function continued:

	Home	This allows the user to perform: <b>Home:</b> This will return you to your home page in the Global PLM system General (Real Time) Search: This allows the supplier to perform a General Real Time Search. Note: Not all suppliers have access to the General Real Time Search																								
	Share	This allows the current URL link of the Global PLM object to be e-mailed to someone else. The e-mail recipient must have a Solventum Global PLM account which allows them to log in and use the URL.																								
	Assistance	This is the help menu which only has Dassault's out-of-the-box help and does not address Solventum customizations. A Dassault account is required to use their system website.																								
	Home	Clicking this button will take you to the ENOVIA Collaboration and Approvals home page, this will not be the homepage that was selected under your General Preferences. – <b>DO NOT USE this icon to access Home. To access your home display, click on your Internet Browser icon in your application tray. Click on the thumbnail of the PLM Home page.</b>																								
	Back	Clicking this button will display a previous object you were looking for viewing; it does not move you to the previous category or current object.																								
	Forward	Clicking this button moves you to an object you visited recently. This button will become active when you have used the back button.																								
	Expand/ Collapse	This icon will shrink the header page or expand it if you have already collapsed it																								
	Refresh	The Refresh icon found in the object window's page header will refresh the information in both the page header and the main content area of the object window.																								
	Structure View	This icon allows the user to see the Workspace Structure																								
	Categories	This icon allows the user to see the left navigation pane of the Workspace.																								
	Download	Using the Download Icon on a PLM object, allows the user to open the file for review or save the PDF file to their hard drive.																								
	Tools	This icon allows the user to Compare, Export, Printer Friendly, Multi Column Sorting, Help  <b>Compare</b> – generates an attribute comparison report between two different PLM objects. A report is generated based on the attribute selection.  <b>Multi Column Sorting</b> allows the records to be sorted using multiple columns. Note: The Multi Column sorting will need to be removed to return the records to default display  The <b>Printer Friendly</b> option will create a non-editable image of the Solventum Objects displayed.  <b>Export</b> will allow the records to be exported to a .csv which can be opened in Excel. A CSV file is created and can be opened in Excel by using this option. From the Tasks window, select the items to be exported by clicking in the box to the left of the item record. <table border="1" data-bbox="389 1738 1474 1801"> <tr> <td><input checked="" type="checkbox"/></td> <td></td> <td>78-9988-5448-9</td> <td>A</td> <td>Prod...</td> <td>UC223 CAD CHECK OU...</td> <td>Preli...</td> <td></td> <td></td> <td>Feb 2,...</td> <td>Feb 2, 2...</td> <td>Test...</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td></td> <td>78-9988-5413-3</td> <td>A</td> <td>Desi...</td> <td>UC223 Add Items to Fold...</td> <td>Preli...</td> <td></td> <td></td> <td>Jan 2...</td> <td>Jan 26, 2...</td> <td>Test...</td> </tr> </table> All listed items can be selected by click in the box to the left of the column header "Type". After selecting the items to be exported, click on the Tools icon and select the Export option. A File Download window will display with the option to Open or Save the information to your	<input checked="" type="checkbox"/>		78-9988-5448-9	A	Prod...	UC223 CAD CHECK OU...	Preli...			Feb 2,...	Feb 2, 2...	Test...	<input checked="" type="checkbox"/>		78-9988-5413-3	A	Desi...	UC223 Add Items to Fold...	Preli...			Jan 2...	Jan 26, 2...	Test...
<input checked="" type="checkbox"/>		78-9988-5448-9	A	Prod...	UC223 CAD CHECK OU...	Preli...			Feb 2,...	Feb 2, 2...	Test...															
<input checked="" type="checkbox"/>		78-9988-5413-3	A	Desi...	UC223 Add Items to Fold...	Preli...			Jan 2...	Jan 26, 2...	Test...															

		computer. To save information in Excel format, click on Save button on File Download window. Name the file and note to what file directory the file is being saved. Launch Microsoft Excel navigate to the csv file location and select the csv file.
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**PLM Icon Function continued:**

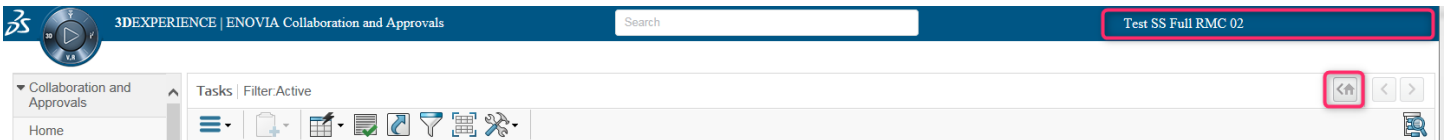
Icon	Icon Label	Function
	Open in New Window	Using the “Open in New Window” Icon will open the related object in a New Window. When the New Window is closed, the window the information was launched from will still display.
	Pagination Off	Found in the lower right corner of Workspace and Workspace Folder window or Task window.  User will be able to scroll through all listed. After Pagination Off has been selected pagination will display as  .
	Pagination ON	Found in the lower right corner of Workspace and Workspace Folder window and Task window.  User will need to use page forward or back to move through the listing.
	View	Clicking on this icon allows the PDF file to be viewed.
	File Attachment	Found in the Search results for documents and listed documents in Workspace folders.
	Customize Table View	Clicking on this Icon will allow you to access All Tasks, Active Tasks, Completed Tasks and Tasks to be Accepted. This icon also allows the creation of your own customized views.
	Mass Approval	This icon is available from the Task window and allows the Supplier to approve Tasks.
	Actions	This icon allows you to: Add Workspace Content, Add to Collection, Create New, Update Documents, Lock, Unlock, Checkout and Zip, Download PDF Images and Lock to Self
	Checkout	Allows the user to check out the document file from a Workspace

**Header Icons no longer display:**

When your header icons no longer display try one of the following two methods.

Method 1) Place mouse at the end of the URL in the URL bar and press Enter to reload the page

Method 2) Close your browser and open a new browser window and log in again.

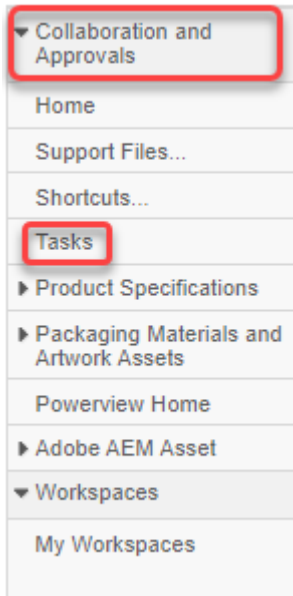




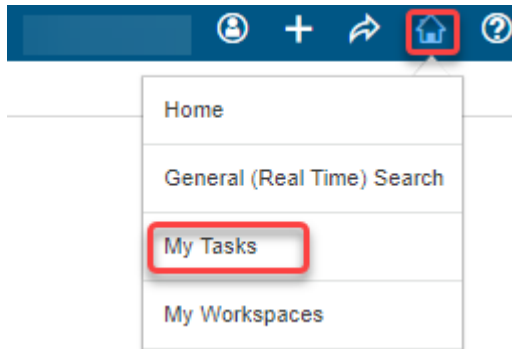
## Navigating to Your Assigned Tasks:


Assigned Tasks can be accessed using the following methods:

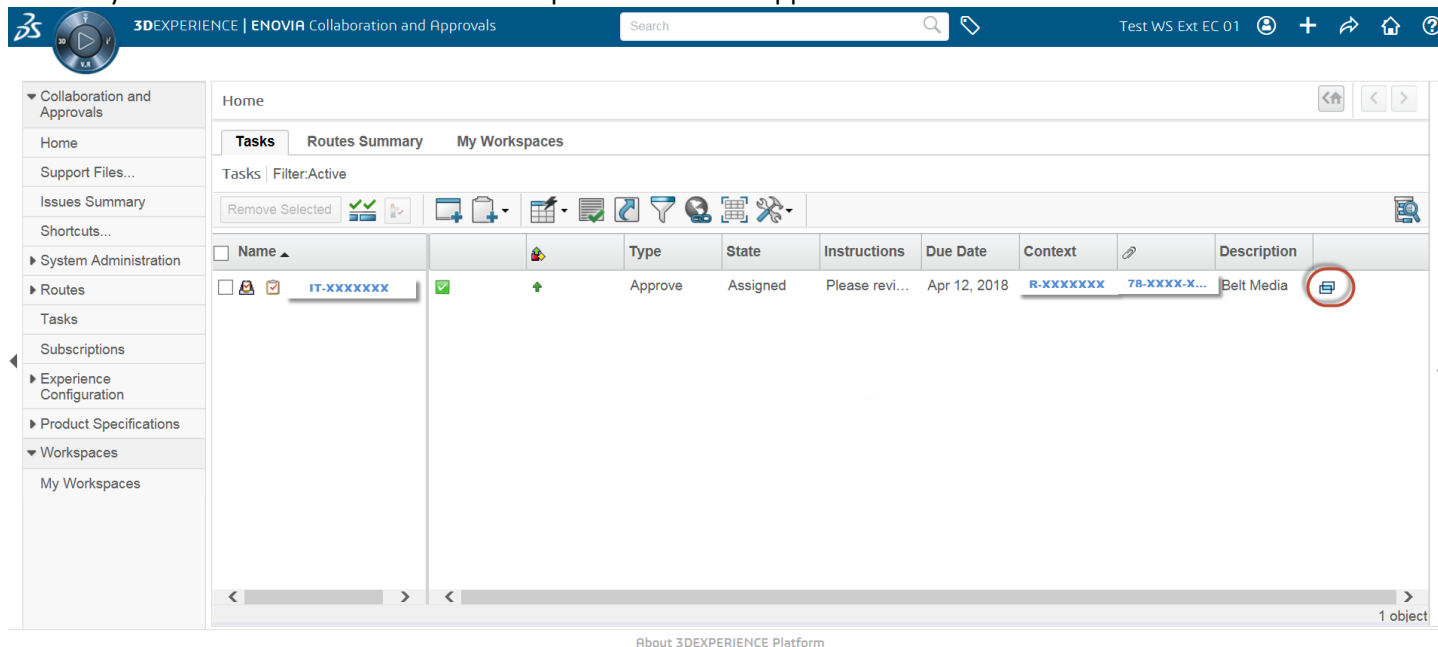
1. Tasks assigned for your approval will display if you have the Homepage under General Preferences set to Default or Tasks.
2. Your Tasks can also be accessed by clicking on Tasks in the Collaboration and Approval navigation pane



3. Assigned Tasks can also be accessed by clicking the Home icon and selecting "My Tasks".











On Tasks screen, click on the blue double pane (Launch Window)  window to the far right of the record to open Summary View screen that will have links to specification and supplier document attachments.






Home


Tasks Routes Summary My Workspaces

Tasks | Filter:Active

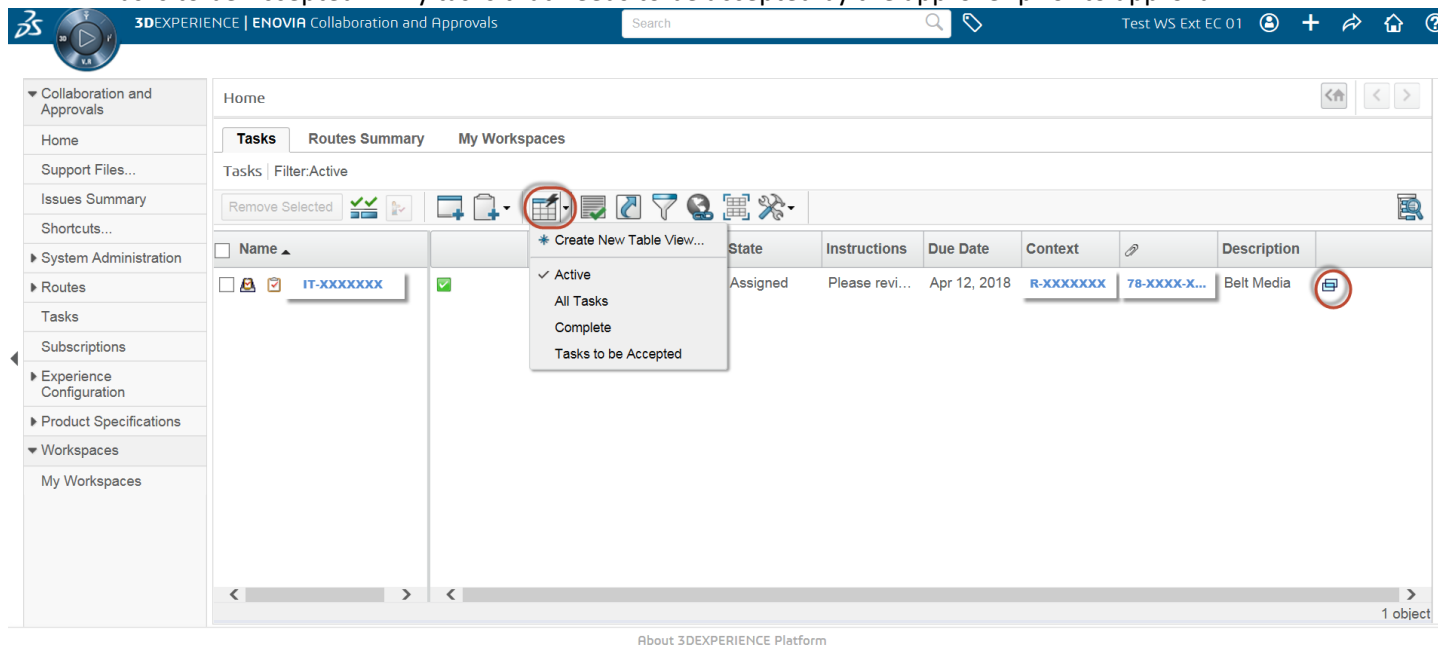
Remove Selected        

Name	Type	State	Instructions	Due Date	Context	Description
  IT-XXXXXXX	Approve	Assigned	Please revi...	Apr 12, 2018	R-XXXXXXX 78-XXXX-X...	Belt Media 

About 3DEXPERIENCE Platform

Manage your approvals on Tasks screen by using drop-down arrow on right side of the Create Table View  icon and click on one of the items.









- All Tasks = All Active and Completed Tasks assigned to you.
- Active = All Active Tasks that need your approval.
- Complete = All Completed Tasks that you have approved.
- Tasks to be Accepted = Any tasks that needs to be accepted by the approver prior to approval






Home

Tasks Routes Summary My Workspaces

Tasks | Filter:Active

Remove Selected        

Name	State	Instructions	Due Date	Context	Description
  IT-XXXXXXX	Assigned	Please revi...	Apr 12, 2018	R-XXXXXXX 78-XXXX-X...	Belt Media 

About 3DEXPERIENCE Platform

## Approving Inbox Tasks:


In Summary View screen, of the Inbox Task can be viewed by clicking on IT number under Name column. When you are ready to approve, click Approve button on this screen.

Then



The screenshot shows the 'IT-XXXXXXX : Summary View' interface. At the top, the state is 'Assigned' and the owner is 'Supplier Name'. The 'Approve' button is circled in red. The 'Assignee' field is also highlighted in red. Below the summary view, there is a table with the following data:

Name	Actions	Description	State	State Block
<a href="#">Global PLM Object for Approval</a>		Belt Media	Review	Review

## Mass Approval Method:

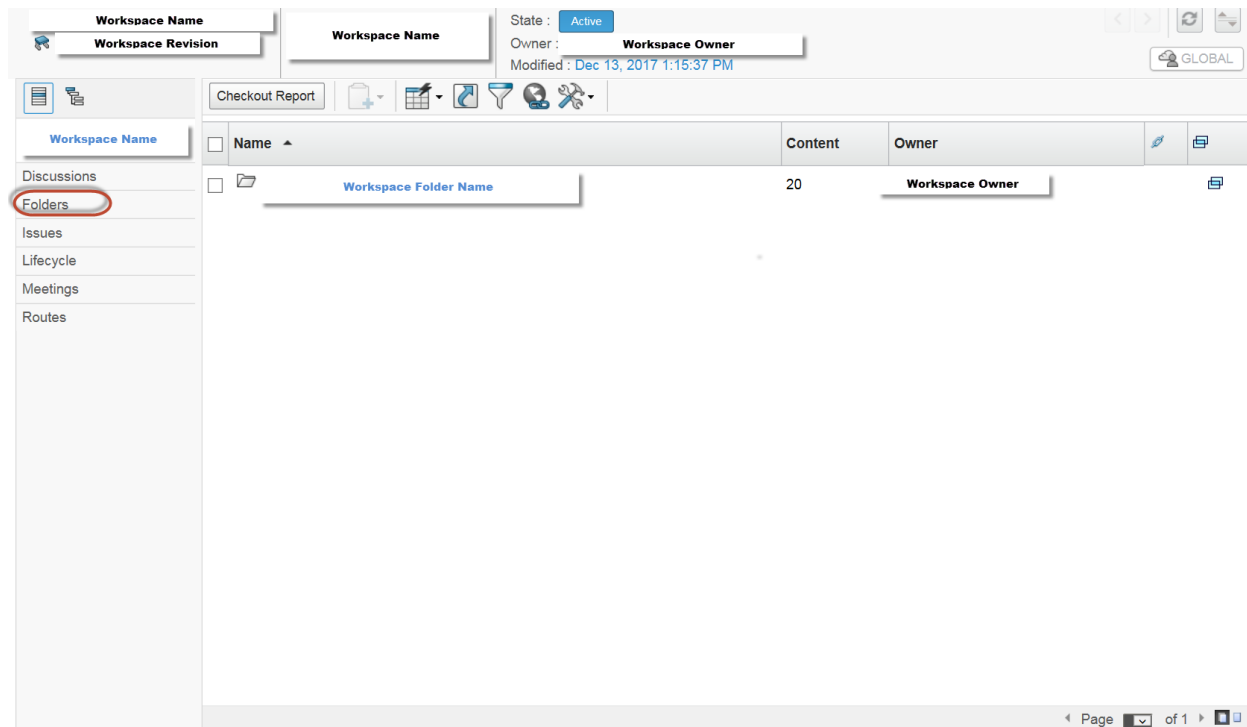
Another Approval method is to close the window you are on, once your review is completed. Click on  and then click on Tasks in the left navigation pane. A listing of Global PLM Inbox Tasks assigned to for approval will display. The Global PLM object can also be accessed from this window for review. Clicking on the Global PLM Object link will open the object in a new window.

Click in the box to the left of the Inbox Task and click Mass Approval icon

If you have opened the Global PLM object and don't know how to get back to the Task Summary View to approve the specification, close the window you are on. Click on  > Tasks in the left navigation pane, your Inbox Tasks for approval will display. Follow same path as before, on Tasks screen, click on the blue double pane (Launch Window)  window to the far right of the record to get to Summary View. In Summary View, click Approve button.



In the right window, either sub folders or data records will display.




### Workspace Navigation:

At the top of the left navigation pane, these two icons are available. These icons allow you to toggle between the Structure and the Workspace Categories. The Workspace Default View is set to the Structure View.

Icon	Icon Label	Icon Function
	Structure View	This icon allows the user to see the Workspace Structure
	Categories	This icon allows the user to see the left navigation pane of the Workspace.

## Creating S-Folder Documents in a Workspace:

The "Create New" function can be found under the Actions  icon.

Step 1 of 2 Specify Details form will display

Select Create New from the Actions menu

Select the appropriate Vault, if you have not set up your Create Vault Preferences

Do not update the Type or Policy field

Enter a brief description

Click Next

Step 1 of 2: Specify Details

*Fields in red italics are required.*

<b>Vault</b>	Division Engineering	...
<b>Type</b>	Document	..
<b>Policy</b>	Document	▼
<b>Title</b>		
<b>Description</b>	Create S Document Test	
<b>Cross Reference ID</b>		
<b>User Defined Search Attribute</b>		
<b>Superceded By</b>		
<b>Read Access</b>	Division Only	▼
<b>Export Control</b>	No	▼
<b>CAD Type</b>		▼
<b>Comments</b>		

Next Cancel


Step 2 of 2: Upload Files

Browse to the File location and upload the file

Do not update the File/Format from Generic.

Click Done

Step 2 of 2: Upload Files

Templates 


*Fields in red italics are required.*

**File | Format**

Browse...	Generic	▼
Browse...	Generic	▼
Browse...	Generic	▼
Browse...	Generic	▼
Browse...	Generic	▼
Browse...	Generic	▼


Previous Done Cancel

## Searching:

The Search options are found under the Home  icon.

Changes to Searching:

The layout of the General (Real Time) Search has changed. The Search criteria fields now display in the left pane of the Search window.

When using the General Real Time Search, the ability to double-click on an item to select it no longer works. Click in the check box to the left of the item then click the item Name to open the object (opt 1 in display) OR use the Open in new window  icon found to the right of the item (opt 2 in display).

Note: If you do not have access to an object, the search results will display the type, name/number, and revision the system will display “No Access” in each of the following fields: Description, State, EBOM, view, Modified, Originated, Owner and Vault.

Search Refinement

General (Real Time) Search

Results: 100, 1 selected

Case Sensitive Limit to 100 results

Type

Name/Number  
78-9988-54\*\*

Revision  
 Highest Released  
 Highest Released & un-Released

Vault  
ALL\_VAULTS

State

Originated

Modified


Owner

Originator

Policy

Display Name	Type	Description	State	EBOM	view	Modified	Originated	Owner	Vault
<input checked="" type="checkbox"/> 78-9988-5461-2	Desi...	DS140 Test Data	Rele...			Feb 2,...	Feb 2, 2...	Test...	
<input type="checkbox"/> 78-9988-5463-8	Desi...	DS140 Test Data	Rele...			Feb 2,...	Feb 2, 2...	Test...	Inf
<input type="checkbox"/> 78-9988-5400-0	Desi...	No Access	No...	N...	N...	No Ac...	No Access	No...	Nc
<input type="checkbox"/> 78-9988-5401-8	Desi...	No Access	No...	N...	N...	No Ac...	No Access	No...	Nc
<input type="checkbox"/> 78-9988-5402-6	Desi...	No Access	No...	N...	N...	No Ac...	No Access	No...	Nc
<input type="checkbox"/> 78-9988-5403-4	Desi...	No Access	No...	N...	N...	No Ac...	No Access	No...	Nc
<input type="checkbox"/> 78-9988-5404-2	Desi...	No Access	No...	N...	N...	No Ac...	No Access	No...	Nc
<input type="checkbox"/> 78-9988-5405-9	Desi...	No Access	No...	N...	N...	No Ac...	No Access	No...	Nc
<input type="checkbox"/> 78-9988-5406-7	Prod...	No Access	No...	N...	N...	No Ac...	No Access	No...	Nc
<input type="checkbox"/> 78-9988-5406-7	Prod...	No Access	No...	N...	N...	No Ac...	No Access	No...	Nc
<input type="checkbox"/> 78-9988-5407-5	Prod...	No Access	No...	N...	N...	No Ac...	No Access	No...	Nc
<input type="checkbox"/> 78-9988-5407-5	Desi...	No Access	No...	N...	N...	No Ac...	No Access	No...	Nc
<input type="checkbox"/> 78-9988-5408-3	Desi...	No Access	No...	N...	N...	No Ac...	No Access	No...	Nc
<input type="checkbox"/> 78-9988-5408-3	CAD...	No Access	No...	N...	N...	No Ac...	No Access	No...	Nc
<input type="checkbox"/> 78-9988-5408-3	Desi...	No Access	No...	N...	N...	No Ac...	No Access	No...	Nc
<input type="checkbox"/> 78-9988-5409-1	Desi...	No Access	No...	N...	N...	No Ac...	No Access	No...	Nc
<input type="checkbox"/> 78-9988-5409-1	CAD...	No Access	No...	N...	N...	No Ac...	No Access	No...	Nc
<input type="checkbox"/> 78-9988-5410-9	Desi...	No Access	No...	N...	N...	No Ac...	No Access	No...	Nc
<input type="checkbox"/> 78-9988-5410-9	CAD...	No Access	No...	N...	N...	No Ac...	No Access	No...	Nc

## Table Views:

Table views in the Global PLM system allow multiple columns to be sorted and personalized. The views can be created and saved. From the Search results window click on the Customize  icon.

1 – Select from the Available Columns for columns to display in the Search results window.

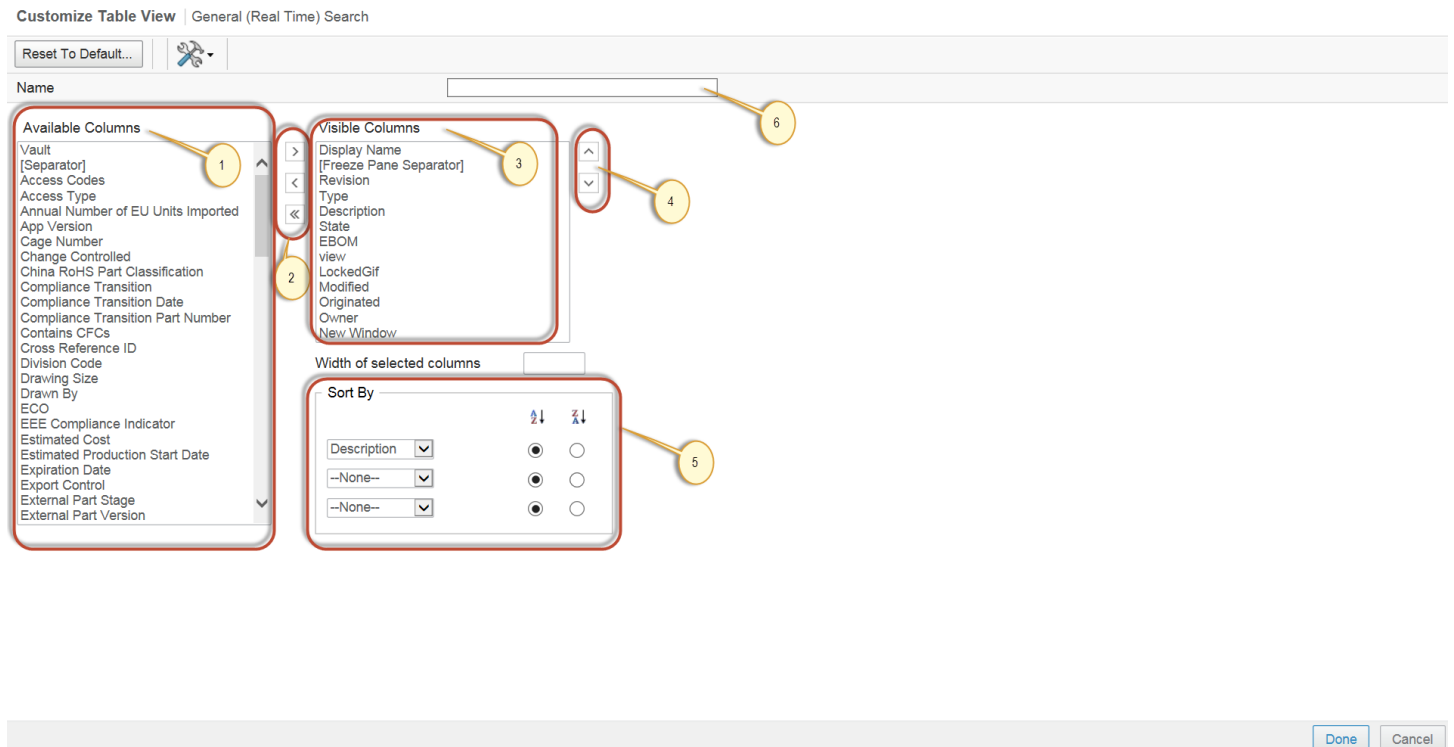
2 – The right arrow to move the selected column to the Viable Columns

3 – The Viable Columns is a listing of columns that display in the Search results window.


4 – The Viable Columns can be arranged to display in the Search results top to bottom displays left to right in the Search results window.

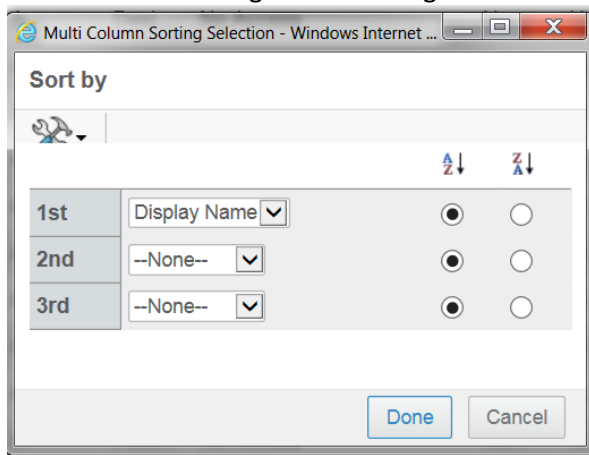
5 – Data fields can be sorted in ascending or descending order

6 – Name the Table View





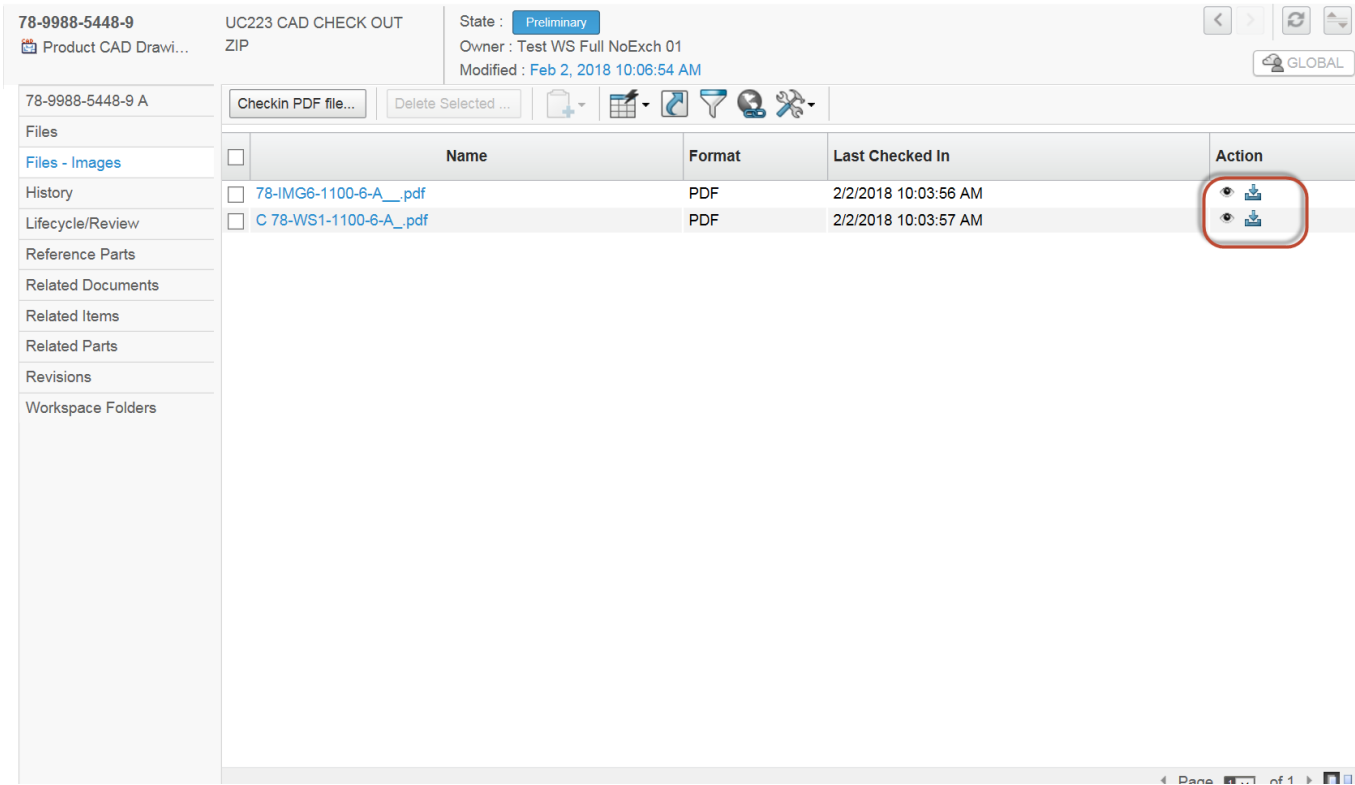
## Multi Column Sorting:





Multi Column Sorting can be applied to General Real Time Search result. Click on the Tools  icon and select Multi Column Sorting from the menu. Select the column headers from the drop-down list and click in the radio button to sort the columns in ascending or descending order.



## View and Download File Attachments:

With the document object open, including within a Workspace, document file attachments can be viewed or downloaded from File Images in the left navigation pane. Click the Viewer  icon or the pdf document link to view the file. The document can be downloaded by clicking on the download  icon. An Open/Save message will display at the bottom of the window.



	Name	Format	Last Checked In	Action
<input type="checkbox"/>	<a href="#">78-IMG6-1100-6-A_.pdf</a>	PDF	2/2/2018 10:03:56 AM	 
<input type="checkbox"/>	<a href="#">C 78-WS1-1100-6-A_.pdf</a>	PDF	2/2/2018 10:03:57 AM	 

## Edit Profile to Update your Address, Phone Number, Extended Absence:

**NOTE:** For name changes or e-mail address changes, please contact the Solventum PLM Technical Support Center 1-844-539-0547. If your e-mail needs to be updated, please also update your e-mail in Supplier Direct as they should match.

### Updating your Address and Phone Number:

To update your Address or Phone Number, click on the ME  icon.

Click My Profile.

Update the information, such as your address then Click “Done” when you’re done updating your profile.

ENOVIA - Windows Internet Explorer provided by 3M/IE 11.0 GPO

Edit My Profile

Fields in red text are required

User Name: Test SS Ext 04  Change Username

Password:

Confirm Password:

First Name: SS Ext 04

Middle Name: 04

Last Name: Test

Title:

Company:  Test PLM Company

User Group: External Supplier

Location:

Pin Number: luxat4efj

Account Type: Project Only

Affiliate Code:

Company Representative:

Office Phone: 651-575-6173

Fax Number: Unknown

Email: testssed04@gmail.com

Mail Address (Street / Building):

City:

State/Region:

Postal Code (Zip):

Country: ALBANIA

Absence Start Date:  [Clear](#)

Absence End Date:  [Clear](#)

Absence Delegate:  [Clear](#)

Site: St. Paul

Done Cancel

## Extended Absence:

**Note:** Delegate must have a Supplier Direct and PLM account to act on behalf of another individual. Please contact the Solventum PLM Technical Support Center 1-844-539-0547

If you plan to be out of the office for extended time-period and want Solventum sent to another person in your company, use the Absence Start Date, Absence End Date, and Absence Delegate fields.

Absence Start Date – Use calendar to select first day out of office.

Absence End Date – Use calendar to select date of return to office.

Absence Delegate – Select person responsible for acting on your behalf. Person must have PLM account set up.

**Note –** If specification approval task is in your Tasks screen before the absence start date, system will not automatically send task to delegate.

Click Done.