



## **ENOVIA SmarTeam**

### **SmarTeam V5R19 Product Enhancement Overview**

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Part No.: GEN-A8-190710

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## WHAT'S NEW

In VR19, ENOVIA SmarTeam has stepped up its efforts to extend the availability of PLM across the organizations and make its offering more easily accessible and available to engineering departments and mid-sized businesses. Enrichment to existing Web capabilities makes access to remote users over the Web easier through improved performance and connectivity. V5R19 increases ENOVIA SmarTeam's multi-CAD advantage with a wider integration of CAD and CATIA systems, making ENOVIA SmarTeam compliant and more available to a growing number of organizations and OEMs.

V5R19 marks the addition of an expanded online collaboration solution, 3DLive, which has been enhanced to take advantage of visual 3D product management. 3DLive provides enterprise customers with real-time business insight and facilitates better decision making throughout the product lifecycle, providing an unmatched solution in the market for collaboration that is both lifelike and simultaneous.

Note: The latest version of this document is available on the ENOVIA SmarTeam Program Directory.

### New Vault Infrastructure

In V5R19 there is a new Vault Infrastructure, which enhances working with local vaults and adds the ability to support vaults over HTTPs protocol.

SmarTeam provides a Vault Server Setup utility (for Windows environment) that enables you to define vaults, implement the Vault Server process and set up security modes for the vaults.

SmarTeam users can work on a remote Web server that is connected to a site, such as Site A, and access a vault server at a different site, such as Site B, which is local to the user. In this way data is saved on the local vault.

In addition to this, SmarTeam provides a logging mechanism, which displays SmarTeam activities including vault activities.

There are changes to the hooking of scripts due to the new Vault infrastructure.

For a detailed explanation of the Vaults refer to the new SmarTeam – Foundation Administration Guide.

### Role Based Installation

The SmarTeam – Editor Installation procedure has been enhanced to provide predefined components, which will be installed according to the role selected. The following roles are now available:

- ☐ **Editor role:** Manages, links and releases technical documents in the context of the product, with data integrity ensured. Use this role to enable users outside of the engineering department to participate in engineering processes by interacting with product-related data and contributing product related content, e.g. requirements and specifications documents.
- ☐ **Engineer role:** Manages E-BOM, M-BOM, item lifecycle engineering release and change processes. It enables users to manage, manipulate, track and collaborate on items, product structure and Bill of Material throughout the product lifecycle and across the extended enterprise and supply chain.
- ☐ **Designer role:** Manages design activities in a multi-CAD, multi-data environment. The Designer role can efficiently create, edit and annotate design and related documents,

including Microsoft Office-type. Powerful searches, “where used” retrievals and product lifecycle operations accelerate work and promote design reuse.

- ☐ **Administrator:** Manages Administrator activities. The Administrator role feature provides you with all the required admin tools.



Note: The new role based installation will not apply when upgrading from a previous version of SmarTeam.

## New Web Form Designer

The Web Form Designer is a utility that allows the administrator/implementer to modify the fields on a Profile Card and the look of the different attributes related to the relevant SmarTeam Class.

The Web Form Designer was rewritten and restructured to support SmarTeam Profile Card Visual Component.

For a detailed explanation of the Web Form Designer refer to the SmarTeam – Editor online help.

## 3D Live Connector

The following 3DLive Connector functionalities are supported in this version:

- ☐ Auto reconnect
- ☐ Representation of BOM items
- ☐ Multi CAD Support (Solid Edge, SolidWorks, Inventor, ProE)
- ☐ Explorer in Place

## Installation CD Structure

In V5R19 a new structure has been applied to the SmarTeam Installation CDs.

- ☐ CD1: SmarTeam Windows Client (SmarTeam – Editor, with new role based installation)
- ☐ CD2: SmarTeam Core and Enterprise Services
- ☐ CD3: SmarTeam Web Services and Viewers
- ☐ CD4: SmarTeam Demo Environment

## Silent Installation

Previous to V5R19, Silent installation was only possible for SmarTeam – Editor. From V5R19 the Windows Installer can be used to perform silent installations of many SmarTeam products/applications.

There are two types of SmarTeam Products Silent Installations:

- ❑ **Client:** SmarTeam – Editor (all roles), SmarTeam – CATIA Web Integration and SmarTeam Visual Components SDK
- ❑ **Server:** SmarTeam – Foundation, SmarTeam – Editor (Designer Role), SmarTeam – Editor web based (SmarTeam – Web Editor), SmarTeam – Job Server, SmarTeam – Multi-site, SmarTeam – Gateway and BizTalk Adapter, DS Viewer and SmarTeam – SDK (I-Platform and IXF)

The Windows Installer performs a command-line based installation without requiring any user interface dialogs. This enables an administrator to use a script to install a SmarTeam product/application automatically for a group of computers.

The Silent Installations documentation is available as a separate chapter in the relevant Installation Guide of the products listed above.

## SmarTeam Express

V5R19 and later versions of ENOVIA SmarTeam Express Engineering (SNE) is intended for customers who want an out of the box implementation of Item Centric, BOM Management and Change Management on top of their current implementation. SNE can be added to all SmarTeam databases by applying the "Express - Engineering (SNE)" mechanism in the Data Model Designer tool (DMD).

SNE enables you to quickly implement the following:

- ❑ Items (physical components that are manufactured or purchased, and are the backbone for the product structure)
- ❑ Bills of Material - BOM (Product Structure)
- ❑ Connection to Electronic CAD systems (ECAD)
- ❑ Change Management - Engineering Change Request (ECR), Engineering Change Order (ECO), etc.
- ❑ Manufacturer Items and Approved Manufacturer List (AML)
- ❑ Bidirectional connection to ERP systems (Enterprise Resource Planning)

For further information refer to section “Adding the Express Engineering (SNE) Behavior to an Existing SmarTeam Database” in the ENOVIA SmarTeam Express Configuration Guide. This document is available on the ENOVIA SmarTeam Documentation CD.

From V5R19 SP1 SmarTeam Express is integrated as part of the ENOVIA SmarTeam - Editor Installation. You do not need any additional installation.

The SmarTeam Express methodology is for SmarTeam – Editor Windows based, SmarTeam CAD Integrations and SmarTeam – Editor Web based.

A new ENOVIA SmarTeam CD is available, called SmarTeam Express Demo CD. It includes the PLMDB and Demo Data.

**Note:** The PLM database (PLMDB) is for demo purposes only and must not be used for implementation purposes. In order to work with the Express package you must build your own database.

The following changes have been made to SmarTeam for the SmarTeam Express methodology:

- ❑ **Attach or detach objects from a process:** only the current node users and SmarTeam Administrators can attach or detach objects from a Process. Therefore, an object cannot be attached or detached in the End Node, even by a SmarTeam Administrator.
- ❑ **Update objects in a process:** only the current node users and SmarTeam Administrators can update the Process. Therefore, a process cannot be updated in the End Node, even by a SmarTeam Administrator.
- ❑ **Accept or reject a process:** The mapping method was changed so it is now fully defined in the Admin Settings without mapping in the script file. To update the Admin Settings refer to the V5R19 SmarTeam – Editor online help.
- ❑ **Purge Specification Links:** in V5R18 SP2 HF1 the user could define in the purge links of minor revisions only or links to previous major releases. From V5R19 SP1, this is defined by the administrator by new Admin Settings. To update the Admin Settings refer to the V5R19 SmarTeam – Editor online help.
- ❑ **Upload Documents:** From V5R19 SP1, a second value was added to the Admin Settings to allow you to define the default class for Upload Documents. To update the Admin Settings refer to the V5R19 SmarTeam – Editor online help.

**Note:** The ENOVIA SmarTeam Design Express and Engineering Express Methodology Guides are available on the ENOVIA SmarTeam Documentation CD.

## SmarTeam – MatrixOne Integration

A MatrixOne user can work with an ENOVIA SmarTeam product and an ENOVIA MatrixOne product as one unified PLM system by using the SmarTeam – MatrixOne Integration.

SmarTeam – MatrixOne Integration is a connector, which is hosted on a SmarTeam server along with SmarTeam – Foundation and enables a MatrixOne user to view SmarTeam data via MatrixOne. The origin of the SmarTeam data is transparent to the user. Data can be retrieved by the MatrixOne user from SmarTeam.

For further information refer to the SmarTeam – MatrixOne Implementation Guide, which is available on the V5R19 SP4 Documentation CD.

## UNIX Withdrawal

UNIX is no longer supported as a client platform, which connects to SmarTeam Web applications i.e. SmarTeam – Editor Web-based client (SmarTeam – Web Editor), SmarTeam – Navigator and SmarTeam – Community Workspace.

## ENHANCEMENTS

### SmarTeam – Editor

The SmarTeam – Web Editor product license was withdrawn in V5R18, and all SmarTeam – Web Editor functionalities were incorporated within the SmarTeam – Editor product license. In the SmarTeam application interface the name SmarTeam – Web Editor was retained, but in all the documentation it is now referred to as the SmarTeam – Editor web-based client.

#### Windows client (SmarTeam – Editor):

- ☐ SmarTeam supports the ability to see in tree view and the grid, the icon based on the file type. Therefore, users can identify the object type not based only on class, but also on file type.
- ☐ SmarTeam supports the ability to see in the grid, the icon based on the value in the lookup table.
- ☐ SmarTeam supports the ability to add a filter to the Reference to Class field that enables you to filter the list results according to the entered characters.
- ☐ SmarTeam supports the ability that the administrator can set the window to be shown when clicking on the Picker button for a Reference-to-Class field in the Search by Example window.
- ☐ SmarTeam supports the ability to suppress the disabled menu items that are usually presented in the right-click menu.

#### Web-based client (SmarTeam – Web Editor):

- ☐ A new Lifecycle Visual Component has been embedded in web
- ☐ New lifecycle operation modes for the user like in the Windows client: Silent (without lifecycle interface), Light (for documents and items without their children) and Advanced (for documents and items with their children)
- ☐ Multiple selection of documents or items for Lifecycle Operations
- ☐ Multiple creation of objects is simplified
- ☐ Unified SmarTeam – Editor and SmarTeam – Web Editor Data Model Designer (DMD). There is no more the separate DMD for SmarTeam – Web Editor and the database is prepared to work with SmarTeam – Editor and web interfaces after the unified DMD is finished successfully
- ☐ Enables the user to launch SmarTeam in Single Sign On (SSO) mode for SmarTeam web-based applications without the need to provide credentials more than once
- ☐ Added Go to State functionality in Item lifecycle
- ☐ Login process modified to support local vault changes
- ☐ Added the ability to search for a specific period of time (i.e. from one date to another)
- ☐ Added My Task Cockpit to SmarTeam – Program Management add-in
- ☐ Added Desktop Objects Filter to the View Manager functionality
- ☐ A new Customize External Viewers feature enables the user to create an infinite number of viewers that can be developed and used
- ☐ Added a new Default Cockpit (Home Page) based Visual Components



- ☐ Added a new 3DLive Embedded Viewer for SmarTeam – Web Editor
- ☐ Remove Recursion for General Links option was added to the View Manager functionality
- ☐ Second Sorting Criteria was added to the View Manager functionality

## **SmarTeam – Navigator**

- ☐ Enables the user to launch SmarTeam in Single Sign On (SSO) mode for SmarTeam web-based applications without the need to provide credentials more than once
- ☐ Login process modified to support local vault changes
- ☐ Added the ability to search for a specific period of time (i.e. from one date to another)
- ☐ Added the ability to perform Copy File
- ☐ Added Desktop Objects Filter to the View Manager functionality
- ☐ A new Customize External Viewers feature enables the user to create an infinite number of viewers that can be developed and used
- ☐ Added a new Default Cockpit (Home Page) based Visual Components
- ☐ Added a new 3DLive Embedded Viewer for SmarTeam – Web Editor
- ☐ Remove Recursion for General Links option was added to the View Manager functionality
- ☐ Second Sorting Criteria was added to the View Manager functionality

## **SmarTeam – BOM**

- ☐ From V5R19 SP5 a new database function is available. It will improve the performance of the following SmarTeam commands in BOM Editor:
  - Expand All
  - Switch to Summary mode
  - Export to Excel
  - Replace Item

In order to use this function you must perform the following tasks:

1. In the SmarTeam Configuration Editor, change the value of “RetrieveOptimizationLevel” from 0 to -1
2. Run DMD and select Create or run SmartDbRepairing.exe and then select Actions/Create DB functions

- ☐ The Copy Tool Mapping Utility has been enhanced with a validation mechanism to enable administrators to validate consistency of the defined copy mappings and thereby prevent data type mismatches, while ensuring that the Copy Tool will perform the intended operation.

## **SmarTeam – Workflow**

This product includes no new functionality in this release.

## **SmarTeam – CATIA Integration**

- ☐ SmarTeam – CATIA integration enables suppliers to handle several CATIA environments. This allows suppliers to meet OEM requirements to work in a specific CATIA environment release, service pack and hotfix settings.
- ☐ Customization of toolbars/menus allows the administrator to remove the SmarTeam menu and work with toolbars only
- ☐ Added the ability to create a new folder from within the Project Manager window.
- ☐ Open dialog enhancements:
  - Added Items shortcut: enables users to browse items and open related CATIA documents
  - Related documents pane: using the new Items shortcut, users can browse items, and the related documents appear in the Related Documents pane
  - Open dialog Quick Search: added the ability to define the order of classes in the Quick Search and any class for Quick Search and Save last used class option
- ☐ Added the ability to map text in title blocks
- ☐ Support for VISTA 64-bit

## **SmarTeam – CATIA Web Integration**

- ☐ A new process indicator has been added to the system. It will be displayed during some operations, e.g. New From..., Save to SmarTeam, Lifecycle operations (Copy, Check out, Check in, New Release and Release), Open, Refresh.

## **SmarTeam – CATIA Supply Chain Engineering Exchange**

- ☐ The following GUI enhancements improve Reconciliator's usability:
  - Reconciliator window size & position are remembered
  - Global-Set may be run by double-clicking
- ☐ Reconciliation of CATShape documents: The Reconciliator helps the customer to simulate and to prepare the data to be saved into the database. The Reconciliator supports a set of document types. The current enhancement extends the document types recognized by the Reconciliator to include the CATShape. This development extends the Reconciliator scope to applications such as Piping and tubing
- ☐ Exposed Reconciliator CAA APIs: Enables the development of CAA applications which integrate Reconciliator functionality and enables the customization of existing Reconciliator functionality by adding new criteria or implementing existing user criteria
- ☐ Save & Restore Reconciliation session: Saves and restores settings that were previously defined for mapping & rules of the interactive Reconciliator application

## **SmarTeam – SolidWorks Integration**

- ☐ Using the new Items shortcut, users can browse items, and the related documents appear in the Related Documents pane
- ☐ Added the ability to create a new folder from within the Project Manager
- ☐ Open dialog enhancements:

- Added Items shortcut: enables users to browse items and open related SolidWorks documents
- Related documents pane: using the new Items shortcut, users can browse items, and the related documents appear in the Related Documents pane
- Open dialog Quick Search: added the ability to define the order of classes in the Quick Search and any class for Quick Search and Save last used class option

## **SmarTeam – AutoCAD Integration**

- ☐ Using the new Items shortcut, users can browse items, and the related documents appear in the Related Documents pane
- ☐ Added the ability to create a new folder from within the Project Manager
- ☐ Open dialog enhancements:
  - Added Items shortcut: enables users to browse items and open related AutoCAD documents
  - Related documents pane: using the new Items shortcut, users can browse items, and the related documents appear in the Related Documents pane
  - Open dialog Quick Search: added the ability to define the order of classes in the Quick Search and any class for Quick Search and Save last used class option

## **SmarTeam – Inventor Integration**

- ☐ Using the new Items shortcut, users can browse items, and the related documents appear in the Related Documents pane
- ☐ Added the ability to create a new folder from within the Project Manager
- ☐ Open dialog enhancements:
  - Added Items shortcut: enables users to browse items and open related Inventor documents
  - Related documents pane: using the new Items shortcut, users can browse items, and the related documents appear in the Related Documents pane
  - Open dialog Quick Search: added the ability to define the order of classes in the Quick Search and any class for Quick Search and Save last used class option

## **SmarTeam – Solid Edge Integration**

- ☐ Using the new Items shortcut, users can browse items, and the related documents appear in the Related Documents pane
- ☐ Added the ability to create a new folder from within the Project Manager
- ☐ Open dialog enhancements:
  - Added Items shortcut: enables users to browse items and open related Solid Edge documents
  - Related documents pane: using the new Items shortcut, users can browse items, and the related documents appear in the Related Documents pane
  - Open dialog Quick Search: added the ability to define the order of classes in the Quick Search and any class for Quick Search and Save last used class option

## **SmarTeam – Multi-CAD Integration**

SmarTeam – Multi-CAD Integration was a new package introduced in V5R18. It enables users to purchase one license for working with SmarTeam – AC Integration, SmarTeam – IN Integration, SmarTeam – SE Integration and SmarTeam – SolidWorks Integration. SmarTeam – Multi-CAD Integration creates the conditions necessary for collaboration among mixed-CAD engineering teams, while seamlessly integrating PDM functionality directly within the native CAD environment. The license is concurrent and is only occupied when in use; each work session requires a separate license.

This package includes no new functionality in this release.

## **SmarTeam – Program Management**

In V5R19, new capabilities are added to SmarTeam Web Interface for Project Members who work with SmarTeam Web Client.

The new capabilities include the following:

- ☐ Ability to view a member's tasks in an editable grid interface (ability to update task information on the grid directly)
- ☐ Ability to filter member's tasks based on various criteria (Due, dependency met, etc)
- ☐ Color-coded visualization of task attributes based on task status

## **SmarTeam – Regulatory Compliance Framework**

This product includes no new functionality in this release.

## **SmarTeam – Foundation**

In V5R19 there is a new Vault Infrastructure, which enhances working with local vaults and adds the ability to support vaults over HTTPs protocol.

SmarTeam provides a Vault Server Setup utility (for Windows environment) that enables you to define vaults, implement the Vault Server process and set up security modes for the vaults.

SmarTeam users can work on a remote Web server that is connected to a site, such as Site A, and access a vault server at a different site, such as Site B, which is local to the user. In this way data is saved on the local vault.

In addition to this, SmarTeam provides a logging mechanism, which displays SmarTeam activities including vault activities.

For a detailed explanation of the Vaults refer to the new SmarTeam – Foundation Administration Guide.

## **SmarTeam – Multi-site**

In V5R19 SmarTeam – Multi-site supports RepliWeb RDS 2.6.

## **SmarTeam – Multi-site Vault**

In V5R19 SmarTeam – Multi-site Vault supports RepliWeb RDS 2.6.

## **SmarTeam – Development Suite**

- ❑ In V5R19, two additional visual components are available for integration SmarTeam components to be embedded inside a corporate portal:
  - Login component - enables the user to login to SmarTeam from a corporate portal.
  - Lifecycle component - part of the new application block visual components, which enable users to perform lifecycle operations from the corporate portal.

## **SmarTeam – Job Server**

This product includes no new functionality in this release.

## **SmarTeam – Gateway**

This product includes no new functionality in this release.

## **SmarTeam – Community Workspace**

SmarTeam – Community Workspace supports jVue 19.2.

## **DOCUMENTATION CHANGES**

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### **Restructured Documentation CD**

The V5R19 Documentation CD has been restructured to provide the documentation per role and in a logical location e.g. product installation guides are in one location.

### **New SmarTeam – Foundation Administration Guide**

This guide outlines the various administrative procedures required to successfully set up and maintain SmarTeam Vaults, SmarTeam – Workflow, SmarTeam Full Text Search and SmarTeam System Configuration Editor in a corporate environment.

It combines information that was located in a number of different documents in previous release.

### **System Configuration Keys Documented**

The new SmarTeam – Foundation Administration Guide contains a link to an excel sheet that provides a list of the V5R19 SmarTeam System Configuration Keys and their descriptions. It is only intended to assist users and may not be a comprehensive list of all the keys in the system.

### **Combined Installation Guides**

The V5R18 SmarTeam – Editor and SmarTeam – Web Editor Installation Guide were combined. Therefore, in V5R19 the SmarTeam – Editor Installation Guide contains all the installation instructions for the SmarTeam – Editor windows and web based client.