

# BASELINX PLM

## User Manual

Version 2.0 | February 2026

Comprehensive Step-by-Step Guide  
for Operating the Baselinx PLM Dashboard

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# 1. Introduction

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Welcome to Baseline PLM, a comprehensive Product Lifecycle Management system designed for aerospace, defense, and satellite industries. This manual provides step-by-step instructions for all features and functionality within the platform.

## 1.1 About Baseline PLM

Baseline PLM is a secure, multi-tenant SaaS application that helps organizations manage:

- Configuration Items (Parts, Assemblies, Components)
- Engineering Change Orders (ECOs)
- Requirements and Traceability
- Deviations and Waivers
- Contract Data Requirements Lists (CDRLs)
- Supplier Data Requirements Lists (SDRLs)
- Complete Audit Trail

## 1.2 System Requirements

| Requirement         | Specification                                 |
|---------------------|-----------------------------------------------|
| Browser             | Chrome 90+, Firefox 88+, Safari 14+, Edge 90+ |
| Screen Resolution   | 1280x720 minimum, 1920x1080 recommended       |
| Internet Connection | Broadband (10 Mbps minimum)                   |

**Security Note:** Baseline PLM is NIST 800-171 compliant and designed to handle Controlled Unclassified Information (CUI). All data is encrypted at rest and in transit.

## 2. Getting Started

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### 2.1 Accessing Baseline PLM

- 1 Open your web browser and navigate to your organization's Baseline PLM URL.
- 2 Click "Launch App" or "Sign In" in the navigation bar.

### 2.2 Logging In

- 1 Enter your registered email address in the **Email** field.
- 2 Enter your password in the **Password** field.
- 3 Click the "Sign In" button.

**Important:** After 5 failed login attempts, your account will be temporarily locked for security purposes. Contact your administrator if you're locked out.

### 2.3 First Time Login

If this is your first time logging in:

1. Accept the Terms of Use when prompted
2. Review and acknowledge the Legal Notice
3. You will be directed to the main Dashboard

### 2.4 Password Requirements

Passwords must meet the following criteria:

- Minimum 12 characters
- At least one uppercase letter
- At least one lowercase letter
- At least one number

- At least one special character (!@#\$%^&\*)

### 3. Dashboard Overview

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After logging in, you'll see the main Dashboard. This is your central hub for monitoring all PLM activities.

#### 3.1 Dashboard Layout

The Dashboard is organized into several key areas:

##### Statistics Panel (Top)

Displays key metrics at a glance:

- **Total CIs** - Total Configuration Items in the system
- **Open ECOs** - Engineering Change Orders requiring action
- **Pending Tasks** - Tasks assigned to you
- **Compliance %** - Overall compliance score

##### Navigation Tabs

Located below the statistics, tabs provide access to different modules:

| Tab            | Description                     |
|----------------|---------------------------------|
| Overview       | Dashboard home with key metrics |
| Parts          | Configuration item management   |
| Change Control | ECO management and workflow     |
| Deviations     | Deviation and waiver tracking   |
| Requirements   | Requirements traceability       |
| Audit Log      | System activity history         |

##### My Tasks Panel (Right Side)

Shows your pending tasks and action items:

- ECOs requiring your review
- Pending approvals
- Overdue items (highlighted in red)

#### 3.2 Using the Search Function

1 Click the search icon in the top navigation bar.

2 Type your search query (part number, ECO number, etc.).

3 Press `Enter` or click the search button.

## 4. Parts Management

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The Parts tab allows you to manage all Configuration Items including parts, assemblies, and components.

### 4.1 Viewing Parts

1 Click the **"Parts"** tab in the Dashboard navigation.

2 The parts list displays with the following columns:

- Part Number
- Name/Description
- Revision
- Status
- Owner
- Last Modified

### 4.2 Creating a New Part

1 Click the **" + Add Part "** button in the top right corner.

2 Fill in the required fields:

- **Part Number\*** - Unique identifier (e.g., PN-001234)
- **Name\*** - Descriptive name
- **Description** - Detailed description
- **Revision** - Starting revision (default: A)
- **Category** - Part type (Hardware, Software, etc.)

3 Click **"Create Part"** to save.

### 4.3 Editing a Part

1 Click on the part row or the **Edit** icon.

2 The Part Detail modal opens with all fields.

3 Modify the desired fields.

4 Click "Save Changes" to update.

**Note:** Any changes to parts are logged in the Audit Trail. Major changes may require an ECO depending on your organization's policies.

#### 4.4 Part Status Workflow

| Status    | Description                      |
|-----------|----------------------------------|
| Draft     | Initial state, under development |
| In Review | Submitted for review/approval    |
| Released  | Approved and released for use    |
| Obsolete  | No longer active                 |

#### 4.5 Linking Parts to ECOs

1 Open the Part Detail modal.

2 Navigate to the "Linked ECOs" section.

3 Click "+ Link ECO".

4 Select the ECO from the dropdown list.

5

Click "Link" to create the association.

## 5. Change Control (ECOs)

The Change Control tab manages Engineering Change Orders (ECOs) through their complete lifecycle.

### 5.1 ECO Dashboard

The ECO dashboard provides:

- List of all ECOs with status filters
- Quick statistics (Open, In Review, Approved)
- Search and filter capabilities

### 5.2 Creating a New ECO

- 1 Click "+ Create ECO" button.
- 2 Complete the ECO form:
  - **ECO Number\*** - Auto-generated or custom
  - **Title\*** - Brief description of change
  - **Change Class\*** - Class I (Major) or Class II (Minor)
  - **Priority** - Critical, High, Medium, Low
  - **Description** - Detailed change description
  - **Justification** - Reason for the change
- 3 Add affected items in the "Affected Parts" section.
- 4 Click "Create ECO" to save as draft.

### 5.3 ECO Workflow States

| State     | Description      | Actions Available               |
|-----------|------------------|---------------------------------|
| Draft     | Initial creation | Edit, Submit for Review         |
| In Review | Under review     | Review, Comment, Approve/Reject |
|           |                  |                                 |

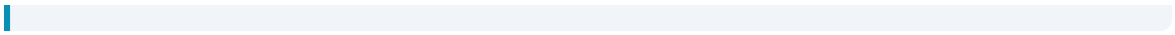
|             |                  |                  |
|-------------|------------------|------------------|
| Approved    | Change approved  | Implement        |
| Implemented | Change completed | Close            |
| Closed      | ECO complete     | View only        |
| Rejected    | Change denied    | Revise, Resubmit |

## 5.4 Submitting an ECO for Review

- 1 Open the ECO in Draft status.
- 2 Verify all required fields are complete.
- 3 Click **"Submit for Review"**.
- 4 Select reviewers from the dropdown.
- 5 Add any comments and click **"Submit"**.

## 5.5 Reviewing and Approving ECOs

- 1 Open the ECO requiring your review (shown in My Tasks).
- 2 Review all details, affected parts, and attachments.
- 3 Click **"Approve"** or **"Reject"**.
- 4 Add required comments (especially for rejections).
- 5 Click **"Confirm"** to complete the action.



## 6. Requirements Management

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The Requirements tab provides comprehensive requirements traceability and management.

### 6.1 Requirements Dashboard

The requirements dashboard displays:

- Requirements hierarchy (tree view)
- Verification status matrix
- Traceability links
- Issues and flags

### 6.2 Viewing Requirements Hierarchy

- 1 Click the "Requirements" tab.
- 2 Use the tree view to navigate parent-child relationships.
- 3 Click on any requirement to view details.

### 6.3 Creating Requirements

- 1 Click "+ Add Requirement".
- 2 Fill in the requirement form:
  - **Requirement ID\*** - Unique identifier
  - **Title\*** - Brief title
  - **Description\*** - Full requirement text
  - **Type** - Functional, Performance, Interface, etc.
  - **Priority** - Must Have, Should Have, Could Have
  - **Parent** - Parent requirement (for hierarchy)
- 3 Click "Create" to save.

## 6.4 Verification Status

| Status      | Description                           |
|-------------|---------------------------------------|
| Not Started | Verification not yet begun            |
| In Progress | Verification underway                 |
| Passed      | Requirement verified successfully     |
| Failed      | Verification failed - action required |
| Waived      | Requirement waived with approval      |

## 6.5 Linking Requirements

- 1 Open a requirement detail view.
- 2 Navigate to the **"Links"** section.
- 3 Click **"+ Add Link"**.
- 4 Select link type (Part, ECO, Test Case, etc.).
- 5 Select the target item and click **"Link"**.

## 7. Deviations Management

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The Deviations tab tracks all deviations and waivers from standard specifications.

### 7.1 Types of Deviations

| Type      | Description                                       |
|-----------|---------------------------------------------------|
| Deviation | Departure from specification before production    |
| Waiver    | Acceptance of nonconforming item after production |

### 7.2 Creating a Deviation

1 Navigate to the **"Deviations"** tab.

2 Click **"+ New Deviation"**.

3 Complete the form:

- **Deviation Number\*** - Auto-generated
- **Type\*** - Deviation or Waiver
- **Title\*** - Brief description
- **Description\*** - Full details
- **Affected Items** - Parts/requirements affected
- **Justification** - Why this is acceptable

4 Click **"Submit"** to create.

### 7.3 Deviation Workflow

Deviations follow this workflow:

1. **Draft** - Initial creation
2. **Submitted** - Sent for review
3. **Under Review** - Being evaluated

4. **Approved/Rejected** - Final decision

5. **Closed** - Completed

## 8. CDRLs & SDRLs

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### 8.1 Contract Data Requirements List (CDRL)

CDRLs track deliverable data items required by contract.

#### Viewing CDRLs

- 1 Navigate to "CDRLs" from the sidebar or dashboard.
- 2 View the list of all contract data requirements.
- 3 Click on a CDRL to view delivery schedule and status.

#### CDRL Status Tracking

| Status       | Description                 |
|--------------|-----------------------------|
| Not Started  | Work not yet begun          |
| In Progress  | Document being prepared     |
| Under Review | Internal review in progress |
| Submitted    | Delivered to customer       |
| Approved     | Customer approved           |

### 8.2 Supplier Data Requirements List (SDRL)

SDRLs track data requirements from suppliers.

#### Managing SDRLs

- 1 Navigate to "SDRLs" from the sidebar.
- 2 View supplier deliverables and their status.

3

Click on an SDRL to update receipt status.

## 9. Audit Log

The Audit Log provides a complete record of all system activities for compliance and traceability.

### 9.1 Viewing Audit Records

- 1 Click the "Audit Log" tab.
- 2 View the chronological list of all activities.
- 3 Use filters to narrow results by date, user, or action type.

### 9.2 Audit Record Information

Each audit record contains:

- **Timestamp** - When the action occurred
- **User** - Who performed the action
- **Action** - What was done (Create, Update, Delete, etc.)
- **Entity** - What item was affected
- **Before/After** - State changes (when applicable)

### 9.3 Filtering Audit Records

| Filter      | Usage                               |
|-------------|-------------------------------------|
| Date Range  | Select start and end dates          |
| User        | Filter by specific user             |
| Action Type | CREATE, UPDATE, DELETE, LOGIN, etc. |
| Entity Type | Part, ECO, Requirement, etc.        |

**Compliance Note:** Audit records are retained for a minimum of 3 years per NIST 800-171 requirements. Records cannot be deleted or modified.

# 10. Baseline AI Copilot

The Baseline AI Copilot provides intelligent assistance for PLM tasks.

## 10.1 Accessing the Copilot

- 1

Click the **Copilot** icon in the bottom right corner of the dashboard.
- 2

The Copilot panel opens on the right side.

## 10.2 Using the Copilot

You can ask the Copilot questions like:

- "What ECOs are pending my review?"
- "Show me parts affected by ECO-2024-001"
- "What is the status of requirement REQ-1001?"
- "How do I create a deviation?"
- "What CDRLs are due this month?"

## 10.3 Copilot Capabilities

| Capability | Description                                        |
|------------|----------------------------------------------------|
| Search     | Find parts, ECOs, requirements by various criteria |
| Explain    | Get explanations of PLM concepts and procedures    |
| Summarize  | Get summaries of complex items                     |
| Guide      | Step-by-step help for common tasks                 |

## 11. Settings & Preferences

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### 11.1 Accessing Settings

- 1 Click your profile icon in the top right corner.
- 2 Select "Settings" from the dropdown menu.

### 11.2 Profile Settings

Update your personal information:

- Display Name
- Email Address
- Phone Number
- Department
- Title

### 11.3 Notification Preferences

Configure how you receive notifications:

- Email notifications (on/off)
- In-app notifications (on/off)
- Notification types to receive

### 11.4 Changing Your Password

- 1 Go to Settings > Security.
- 2 Enter your current password.
- 3 Enter your new password (twice to confirm).
- 4 Click "Update Password".



## 12. Troubleshooting

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### 12.1 Common Issues

#### Cannot Log In

- Verify your email address is correct
- Check Caps Lock is not on
- Use "Forgot Password" if needed
- Contact your administrator if locked out

#### Page Not Loading

- Refresh the page (F5 or Ctrl+R)
- Clear browser cache
- Try a different browser
- Check your internet connection

#### Cannot Edit an Item

- Verify you have the required permissions
- Check if the item is locked by another user
- Ensure the item is not in a read-only state

### 12.2 Getting Help

If you need additional assistance:

- **Help Center:** Click the "?" icon in the navigation
- **Email Support:** support@baselinxplm.com
- **Phone Support:** Available for enterprise customers

**Feedback:** We value your feedback! Use the "Feedback" option in the user menu to share suggestions or report issues.