![UCM - a service by buildingSMART International]

buildingSMART International Use Case Management
Quick Guide for project leader

UCMS training website   https://www.bsi-ucm-en.info

Version V21.03   Check for updated version on: https://www.bsi-ucm-en.info/quick-guide/

Roles	
USER	Participant of the project team
PL	Project Leader
ADMIN	Administrator of the organization, I which the project is executed (local administration)
UCM PMO	Use Case Management Project Management Office (global administration)

PL starts request for a new project

Which organization should I contact?

- international activity → bSI room, bSI project or bSI activity team? → **Contact bSI MO**
- national activity → bS Chapter available → **Contact local bS Chapter**
- national activity → no bS Chapter available → **Contact UCM PMO**

UCM Website
> bSI UCM / CONTACT

Terms & Conditions

PL can access his project ········· **Project set-up in co-creation space**

Project manager informs team members to register at UCM

- User is not yet registered → **User registration at UCM Website**
- User is already registered but under another organization → **Contact UCM PMO** → **UCM PMO assigns user to additional organization**

UCM Website
> LOGIN

! If a user has previously registered under another organization, he must be assigned to the new organization by the UCM PMO

UCM
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Training
UCM training website
> CREATE NEW PROJECT

PL or ADMIN add one or multiple new documents

Documents (mandatory information)
Title in English and local language
Life Cycle phases
Assigned Discipline

⚠️ After selecting the lifecyle stages and disciplines, the structure of the document is created automatically. Therefore, after the first saving a change is no longer possible. If the lifecyle stages or disciplines have been selected incorrectly, the document must be created again.

PL informs ADMIN about project group

Participants
Name, first name
E-Mail
Roles
Project manager (write rights, can edit comments)
Team member (read rights / can comment)

ADMIN assigns access rights for all documents

All user can access the document according to their user rights

ADMIN gives PL clearance for project start

⚠️ The user can access the document by the EDIT button. If it EDIT not visible, the access rights have not been assigned. Contact the ADMIN for support

Training
UCM training website
> TRAINING

PL develops the document according to the given structure

Freeform — IDM / Use Case

Freeform branch

METADATA consists of identification- and classification-items as well as further background information on the document.

METADATA

Document types: CASE STUDY / TECHNICAL REPORT / WHITE PAPER. Freely selectable text blocks for the description of the document

CASE STUDY TECHNICAL REPORT WHITE PAPER

Add a CHANGE LOG and a version number prior to the publication of the document

CHANGE LOG

IDM / Use Case branch

METADATA

METADATA consists of identification- and classification-items as well as further background information on the document.

USE CASE

USE CASE defines propose and the scope for the information delivery

PROCESS DEFINITION

PROCESS DEFINITION is made through at least one of the following: process map / interaction map / Transaction map

EXCHANGE REQUIREMENTS

Information delivery exchange requirements in non-technical format

CHANGE LOG

Add a CHANGE LOG and a version number prior to the publication of the document

PL informs ADMIN to publish document

Quality Check Tags

UCM
Website

Document published