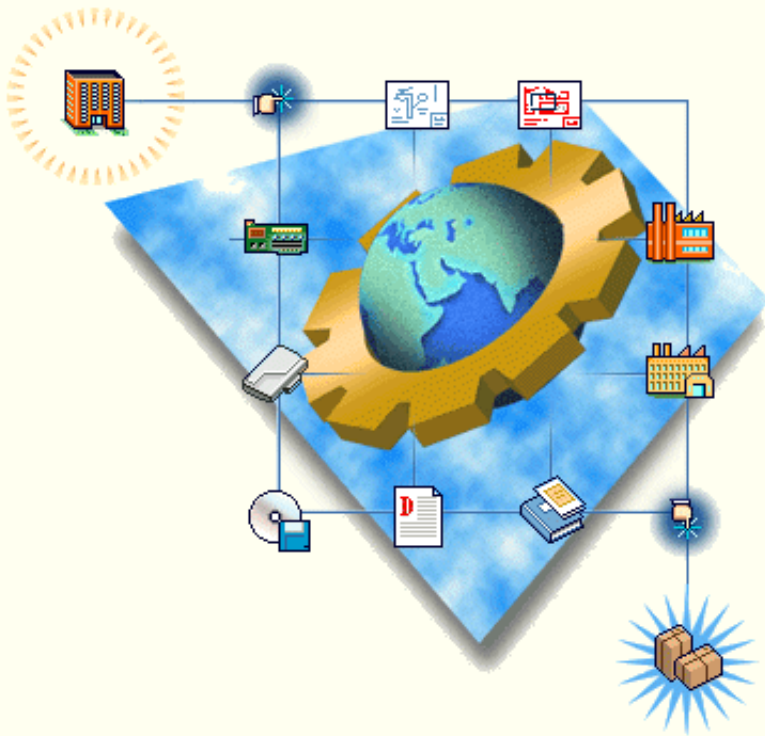


Application Exchange Framework™

Version 10.5



User Guide



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The documentation that accompanies MatrixOne Applications describes the applications as delivered by MatrixOne. This documentation includes readme files, online help, user guides, and administrator guides. If changes are made to an application or to the underlying framework, MatrixOne cannot ensure the accuracy of this documentation. These changes include but are not limited to: changing onscreen text, adding or removing fields on a page, making changes to the administrative objects in the schema, adding new JSPs or changing existing JSPs, changing trigger programs, changing the installation or login process, or changing the values in any properties file. For instructions on customizing the provided documentation, see the Application Exchange Framework Guide.

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MatrixOne Inc.
210 Littleton Road
Westford, MA 01886, USA
Telephone: 978-589 4000
Fax: 978-589-5700
Email: info@matrixone.com

Web Address: <http://www.matrixone.com>

Table of Contents

Copyright and Trademark Information	2
Chapter 1. Introduction to MatrixOne Applications	7
Logging In	7
Logging Off	9
Overview of the MatrixOne Applications Window	10
Using Desktop PowerView	14
Using Table Pages	16
Two Kinds of Table Pages	17
Selecting Rows in a Table	18
Navigating Within a Table.....	18
Filtering Table Data	19
Sorting Tables	21
Exporting Table Data.....	21
Getting More Information about an Item (Using the Context Navigator)	23
Context Navigator Displays Category List for Selected Item.....	23
Viewed Items Insert into Category List	25
Some Item Details Appear in a Popup Window	27
Navigating In and Managing the Context Navigator.....	28
Viewing Details for Items with a Hierarchical Structure.....	29
Sending and Receiving Messages and System Notifications.....	33
Listing Your Incoming Messages.....	33
Reading Messages	35
Sending a New Message	36
Replying To and Forwarding Messages.....	38
Changing Your Password	39
Finding Software Versions	40
Choosing Preferences	41
Choosing Your Home Page	41
Choosing Your Export Format.....	42
Choosing Preferred Currency and Unit of Measure	45
Choosing a Language for Notifications	47
Choosing a Default Vault for Searching	47
Choosing a Pagination Preference.....	48
Choosing a Time Zone Preference	49
File Naming and Text Entry Guidelines.....	51
Printing a Page	52
Controlling the Displayed Date/Time Format	53
Using Application Documentation.....	54
Using Online Help	54
Printing a Help Topic	58
Chapter 2. Frequently Used Functions	59
Searching for Objects	59
Using General Search.....	60

Using Advanced Search.....	62
Saving Search Criteria	65
Working with Saved Searches	65
Selecting a Type	67
Selecting a Vault	69
Finding and Selecting People.....	69
Using Search and Select.....	71
Collections	74
Creating a Collection.....	74
Adding Items to a Collection	75
Listing Your Collections	76
Managing a Collection.....	77
Deleting a Collection	78
Entering Dates Using the Calendar	80
Viewing History	81
Using Page History	84
Administration Tools	87
Viewing System Data	87
Viewing Session Monitor.....	87
Run MQL Admin Link	88

Chapter 3. Object Lifecycles 91

Overview	91
Viewing an Object's Lifecycle	92
Promoting and Demoting an Object.....	94
Applying a Signature	96
Budget Lifecycle.....	98
Build Lifecycle	99
Business Goal Lifecycle	100
CAD Drawing Lifecycle	101
CAD Model Lifecycle.....	103
CTQ Lifecycle.....	105
Development Part Lifecycle.....	106
Document Lifecycle.....	108
Document Sheet Lifecycle	109
Drawing Print Lifecycle.....	110
Drawing Print Markup Lifecycle.....	112
EC Part Lifecycle.....	113
ECR Standard Lifecycle	116
ECR Supporting Document Lifecycle (Sketch)	119
ECO Lifecycle	120
Incident Lifecycle.....	122
Issue Lifecycle.....	123
Manufacturer Equivalent Lifecycle	124
Member List Lifecycle	126
Model Lifecycle	127
Part Family Lifecycle	128
Part Quality Plan Lifecycle	129
Part Quality Plan Template Lifecycle.....	130

Product Lifecycle.....	131
Product Configuration Lifecycle	132
Product Feature Lifecycle	133
Product Line Lifecycle	134
Program Lifecycle	135
Program Lifecycle	136
Project Lifecycle.....	137
Project Template Lifecycle	138
Project Concept Lifecycle	139
Quality Lifecycle.....	140
Question Lifecycle.....	141
Quotation Lifecycle	142
Request for Quotation Lifecycle.....	143
Requirement Lifecycle	144
Resource Lifecycle.....	145
Risk Lifecycle	146
Route Template Lifecycle.....	147
Specification Lifecycle.....	148
Specification Change Order Lifecycle.....	149
Specification Template Lifecycle	150
Supplier Development Plan Lifecycle.....	151
Supplier Development Plan Deliverable Lifecycle.....	152
WBS Task Lifecycle	153

Index	155
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Introduction to MatrixOne Applications

Logging In

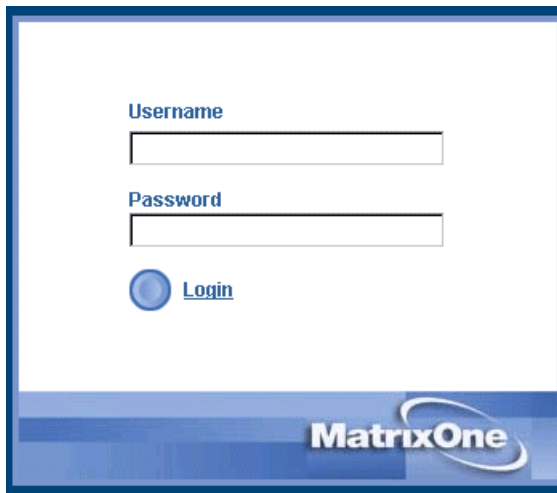
Before you can log into the MatrixOne applications, you and your company must be added.

If you try to access an application without having logged in already, the system presents a login page. The applications use your login information to display the options relevant to your role(s), give you access to information for your company, and let you work on the items you own.

Your login page may be different than the one described in the following procedure and may even be a dialog box instead of a Web page. You will still be required to enter at least a user name and password as described in Steps 2 and 3. For help completing custom login pages, see your MatrixOne Business Administrator.

To log into the MatrixOne applications


1. In your Web browser, navigate to the URL or link provided to you.



2. At the login page, type your user name in the **Username** box.
This field is case sensitive. Make sure you type uppercase and lowercase letters exactly as specified by your Administrator.
3. Type your password in the **Password** box.
This field is case sensitive. Make sure you type uppercase and lowercase letters exactly as specified by your Administrator.
4. If the login page has a **Secure ID** box and you are required to enter a secure ID to log in, enter your pin number and the ID shown on your SecureID Key Fob. If you are not required to enter a secure ID, leave the box blank.
5. Click **Login**.
The MatrixOne application opens. The My Desk and Actions menus contain the applications you have access to and the options appropriate for the roles you are assigned. The largest section of the window shows the Home page. For information on the MatrixOne applications window, see [Using Table Pages](#).

Logging Off

To log off the MatrixOne applications

- Click the **Logout**  tool in the global toolbar.

Depending on how your system is set up, the system returns you to the MatrixOne applications Login page or to the page you used to launch the MatrixOne applications. If you logged in using a centralized login page, which logged you into applications other than just the MatrixOne applications, you will not be logged out of that system until you close the browser window. (If you aren't sure if the login is centralized, close the browser to be sure you are logged off.)

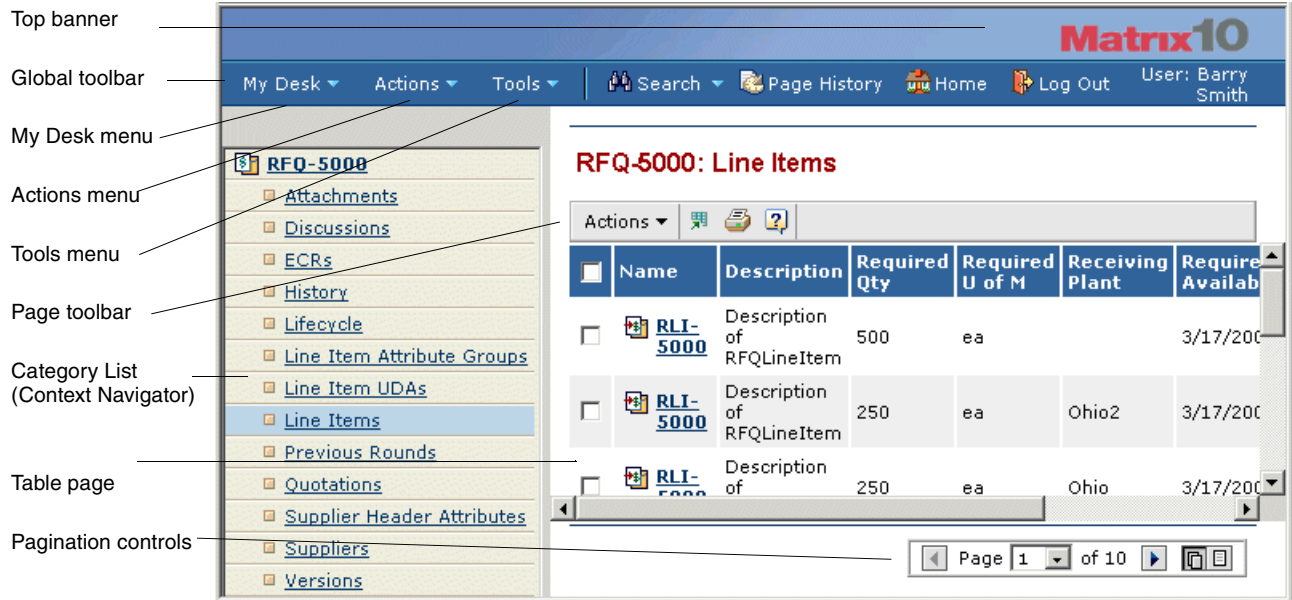
If you click the Logout tool and the Application Menu page displays or the applications remain open, your system may not be configured properly. Close the browser window to log out and contact your Administrator.

Quitting the Browser when using a Macintosh

On PCs and Unix systems, exiting the browser logs you off the applications and is the same as using the Logout tool, as described above. In contrast, when using a Macintosh, exiting the browser does not log you out. Instead, you must use the Logout tool to log out. For example, when using the MatrixOne applications on a Macintosh, suppose you quit the browser, instead of logging out as described above. You then open the browser again and enter your login URL. Instead of opening the Login page to ask for your user name, the system opens the main MatrixOne applications window and the user who logged in prior to quitting the browser is the current user.


Overview of the MatrixOne Applications Window




This section describes the main elements within the MatrixOne applications window.



Global Toolbar

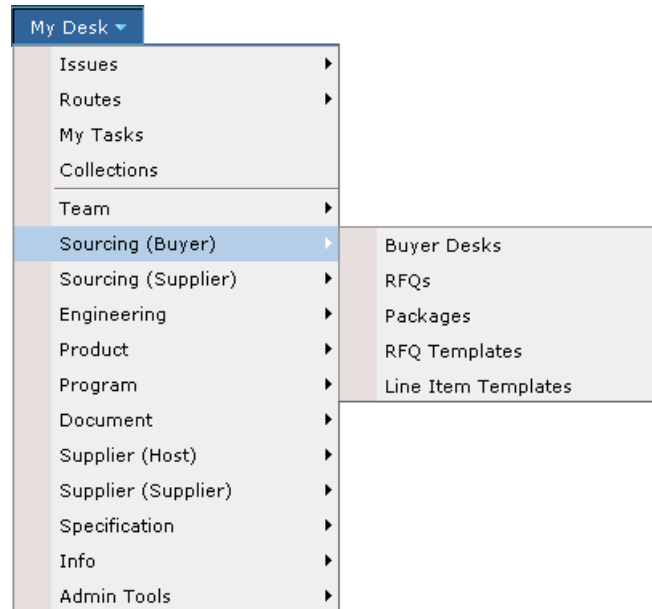
The global toolbar shown at the top of MatrixOne applications contains tools that are independent of the page or option you are currently working with. It holds top-level menu items: the My Desk, Actions, and Tools menus, which have drop downs; and Search, Page History, Home and Logout buttons. The following table explains these items:

Tool	Use to:	For more information, see:
My Desk menu	Select an application-specification or common page. You can access common functions such as routes, issues, tasks and documents. Or you can access pages specific to certain applications, such as workspaces, products, specifications, etc. It also provides access to Admin Tools, including System Data, Monitor and MQL (Matrix Query Language) for those who have access.	My Desk Menu
Actions menu	Select an application-specification action to perform. These include creating new objects and running reports.	Actions Menu
Tools menu	Select tools that apply to MatrixOne applications in general. This menu also includes access to the commands that are in the global toolbar.	Tools Menu
Search 	Search for items. The items you can search for depends on your assigned roles. For example, Buyers can search for RTSes, packages, suppliers, and parts. Suppliers can search for quotations and parts.	Searching for Objects in Chapter 2

Tool	Use to:	For more information, see:
Page History 	See a list of the last 50 pages you have visited since you logged in. Use the list to: <ul style="list-style-type: none"> revisit pages bookmark pages copy the address (URL) for a page and paste it in an email to invite other users to visit the page 	Using Page History in Chapter 2
Home 	Return to the Home page.	Choosing Your Home Page
Logout 	Log out of the application and return to the login page.	Logging Off

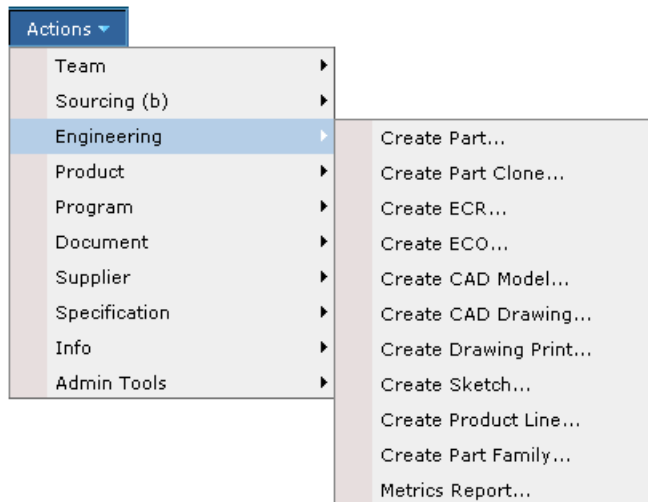
My Desk Menu

The My Desk menu provides access to features that are common to all applications and also contains a submenu for each application that you have access to. Each submenu contains links for items that are important to you, based on the roles you are assigned. Clicking most links on the menu presents a list of items that you are responsible for or need to address in some way. For example, buyers can click the Buyer Desk link in the Sourcing submenu to see the Buyer Desks they are assigned to.



Actions Menu

The Actions menu is divided into submenus for each application. These submenus contain options for performing actions that are not dependent on a selected item or the current context. For example, the Engineering submenu on the Actions menu contains a list of Create actions for Engineering Central objects and a link to run a metrics report. The actions that are listed depend on the roles assigned to you.






The options on the Actions menu are also on pages within the applications. For example, the Create RFQ link is also on the RFQs page, which opens when a buyer clicks RFQs from Sourcing's My Desk menu.

Because you usually work within the context of a particular business item (buyers work on bid lists for a particular RFQ, suppliers enter bid data for line items in a particular quotation, Design Engineers work on particular parts or ECRs, etc.), the links for most actions appear on pages that pertain to a particular item or set of items and not on the Actions menu. For example, one action buyers can perform in Sourcing Central is to cancel an RFQ, but the buyer must first select an RFQ to cancel. Therefore, the link for canceling an RFQ is on the RFQs page, which lists all RFQs for the company.

Tools Menu

The Tools menu contains items that apply to MatrixOne applications in general. The following table lists the contents of the Tools menu.

Tool	Use to:	For more information, see:
Home 	Display the page specified in Preferences as your home page.	—
PowerView	Display the PowerView page that has been set up for your installation.	Using Desktop PowerView in Chapter 1
Search 	Search for items. The items you can search for depends on your assigned roles.	Searching for Objects in Chapter 2
Page History 	See a list of the last 50 pages you have visited since you logged in. Use the list to: <ul style="list-style-type: none"> revisit pages bookmark pages copy the address (URL) for a page and paste it in an email to invite other users to visit the page 	Using Page History in Chapter 2





IconMail 	Send and receive messages from other MatrixOne application users and read system notifications.	Sending and Receiving Messages and System Notifications
Preferences	Set preferences for applications. For example, you can choose the page you want displayed by default when you log in and when you click the Home page tool.	Choosing Preferences
Change Password 	Change the password you use to log in to MatrixOne applications.	Changing Your Password
Reload Cache 	Refresh the user interface when configuring dynamic user interface administrative objects. (Administration Managers only)	AEF Administrator Guide
About	See the version numbers for MatrixOne application software and underlying “infrastructure” software.	Finding Software Versions
Logout 	Log out of the application and return to the login page.	Logging Off
Administration	Make changes to organization and people information. (Administration Managers only)	Common Components Guide
Edit Profile	Make changes to your own user profile details, such as name, phone numbers, addresses, etc.	Common Components Guide

Table Pages

Much of the information shown in the MatrixOne applications is presented in tables. Clicking links from the My Desk menu displays a list of items shown within a table. Clicking most categories in the Context Navigator also displays a page with items in a table. Table pages show summary information about the items, let you select and work with the items, and let you click an item name to get more information about the item. Many table pages contain an Actions menu that contains commands relevant to the data in the table, such as Create New, Add Existing, and Edit Details.

For more information about table pages, see [Using Table Pages](#).






Context Navigator

The Context Navigator shows categories of information about an item when you click the name of the item. For example, the Context Navigator shows Access, Content, Tasks and Discussions categories when you click the name of a route. When clicked, most categories show a table that lists items in the category. When you click the name of one of these items, the category list for that item is inserted into the Context Navigator, under the appropriate category. As you view related items, the items and their category lists continue to insert into the original category list. Inserting items into the Context Navigator lets you navigate to related information without losing track of the current context.

For more information about using the Context Navigator, see [Getting More Information about an Item \(Using the Context Navigator\)](#).

Page Toolbar

The page toolbar contains tools that apply to the current page. Page toolbars can contain any of these tools.

Tool	Use to:	For more information, see:
Currency Converter 	Apply the currency and unit of measure selections you made using the Currency Converter tool on the main toolbar to the current page. Any cost or unit of measure attribute is converted to the selected measurements.	Choosing Preferred Currency and Unit of Measure
Filter Table Data 	Available for some table pages. Filter the table rows based on column data. For example, in a table that includes a State column, filter the table so it shows only items in a specific state.	Filtering Table Data
Export Table Data 	Available for some table pages. Export the data in the table to the format you choose in Preferences: csv, html, or text.	Exporting Table Data
Print 	Generate a printable view of the current page.	Printing a Page
Page Help 	See the help topic that explains the current page.	Using Application Documentation

Using Desktop PowerView

The Desktop PowerView page is configured by a Matrix Business Administrator to provide users direct access to items that are important to their daily use of the applications. It can display information from different locations in an application—or from multiple applications—in a single page.

Because it is configurable, each installation's Desktop PowerView is likely to be different. In general, the PowerView contains a number of tabbed sections that reflect pages that can be found throughout the MatrixOne applications. For example, if you use Engineering Central and Team Central, your Desktop PowerView page could contain tabs for My Tasks, Meetings, Workspaces, Parts, and ECOs.

Each tabbed section functions as its own page and can contain a toolbar and Actions menu. In many cases, the tabs shown on the PowerView page correspond to category list items and show the same information as when you click a category. In some cases, to conserve space, the PowerView tab contains a subset of the information accessed from the category list.

You can set up your Home preference to display PowerView whenever you click the Home icon on the global toolbar, or you can access the Desktop PowerView any time from the Tools menu.

To access the Desktop PowerView page

1. From the global toolbar, click **Tools>PowerView**

Or

If your Home page is configured to display PowerView, click **Home** from the global toolbar. For details, see [Choosing Your Home Page](#).

Matrix10

My Desk ▾ Tools ▾ Shortcuts ▾ Search Home Log Out

PowerView

Actions ▾

My Collections Technical Specifi... Specification Tem... SCDs

Actions ▾

Name	Count
<input type="checkbox"/> Collection-5000	11
<input type="checkbox"/> My Workspace	24
<input type="checkbox"/> Parts 2000	200
<input type="checkbox"/> Parts 3000	8
<input type="checkbox"/> Parts and ECRs for Alpha Project	8


Page 1 of 10

Tasks Routes

Actions ▾

Name	Action	Instructions	Due Date/Time	Route
<input type="checkbox"/> Task-5000	Approve	Please review this task and determine if this task is acceptable. Provide comments on your analysis and set the action as to whether you approve or reject the item associated with this task.	Sep 2, 2002 4:00 PM EST	Route-5000
<input type="checkbox"/> Task-5011	Approve	Please review this task and determine if this task meets the company standards for this type of product. Provide comments and promote or demote the object associated with this task.	Jul 5, 2002 12:30 PM EST	Route-5000
<input type="checkbox"/> Task-5011	Approve	Please perform the assigned task by reviewing this document and note when you have completed your review. Provide additional comments that may be useful to other readers of this document.	Jul 5, 2002 10:00 AM EST	Route-5000
<input type="checkbox"/> Task-5011	Approve	Please perform the assigned task per the standard procedures applicable to this task.	Jul 5, 2002 9:00 AM EST	Route-5002


Page 1 of 10

2. Work with PowerView by clicking any tab. For help on the tabbed section, click  on the toolbar for the tabbed section or see the appropriate user guide.
3. To log out of the MatrixOne applications, click **Logout** from the PowerView page Actions menu.

Using Table Pages

This graphic shows the main components of a table page. Each component is described in the table that follows.




The screenshot shows a table titled "RFQs" with a filter list set to "All". The toolbar includes an "Actions" menu and several icons. The table has columns for Name, Round, State, Owner, Quote Requested By Date, Response Status, Package, and Workspace Folder(s). The table contains six rows of data, each with a check box and a popup icon. The pagination controls at the bottom show "Page 1 of 10".


















Table Component	Description	For more information, see:
heading	Every table page has a heading that describes the content of the table. In the graphic shown above, the table contains a list of RFQs. In some cases, the content may be a list of items for a particular item. For example, a table might contain a list of line items for a particular RFQ. In this case, the heading would contain the table content, "Line Items", preceded by the name of the RFQ.	Two Kinds of Table Pages
filter list	Some table pages contain a drop-down list in the upper right corner that lets you filter the displayed list. For example, buyers can use the filter list on the RFQs page to see only the RFQs they own or co-own, that have been routed to them, or that are in workspaces they belong to.	Filtering Table Data
toolbar	The menus in the toolbar for a table page let you perform actions that are related to the items in the table or to the page topic in general.	Page Toolbar
sortable column headings	You can sort tables based on a column by clicking that column's heading.	Sorting Tables
table	The table is a list of related items and attributes about each item. Most tables contain check boxes that let you select multiple rows to work on or buttons that let you select one row to work on. You can access details about an item in a table by clicking the Name of the item or clicking the Popup  icon.	Getting More Information about an Item (Using the Context Navigator)
pagination controls	The pagination controls let you scroll to additional rows when the table takes up more than one page. You can also use the controls to turn off pagination, listing all rows on a single page.	Navigating Within a Table


Two Kinds of Table Pages

Table pages can contain a top level list or a list of items specific to another item. All My Desk links present table pages with top-level lists of items, such as all RFQs for a buyer's company or all quotations for a supplier's company.

RFQs All ▾

Actions ▾   

<input type="checkbox"/>		Name ▾	Round	State	Owner	Quote Requested By Date	Response Status	Package	Workspace	
<input type="checkbox"/>		 RFQ-1000	1	Started	John Smith	8/30/2001	0/4	Package-2244	Aurora Dashboard	
<input type="checkbox"/>		 RFQ-2000	2	Sent	Rebecca George	8/30/2001	1/3		Taurus Suspension	
<input type="checkbox"/>		RFQ-3000	4	Response Completed	Alice Tenon	8/30/2001	0/2		Explorer Wheel	
<input type="checkbox"/>		 RFQ-4000	2	Started	Albert Swanson	8/30/2001	2/2			
<input type="checkbox"/>		RFQ-5000	1	Sent	Thomas Wataki	8/30/2001	0/2		Jeep Rollbar	
<input type="checkbox"/>		RFQ-6000	5	Started	Tim Chamberlain	8/20/2001	1/2	Package-2244	Hybrid Generator	



Page 1 of 10 









In contrast, when you access a table page by clicking a category in the Context Navigator, the table shows items related to the item that the category is for. For example, when a buyer clicks the Line Items category for an RFQ called RFQ-200, the table page that opens shows all line items for RFQ-200, as shown below. Notice the heading for the table page shows the name of the item in the Context Navigator (RFQ-200) and the type of information in the table (Line Items).


RFQ-200 1

- [Attachment](#)
- [LifeCycle](#)
- [Line Item Attribute Group](#)
- [Line Item UDA](#)
- [Line Item](#)
- [Previous Round](#)
- [RFQ Quotation](#)
- [Supplier](#)
- [Version](#)
- [History](#)
- [ECRs](#)
- [Supplier Header Attributes](#)

RFQ-200 1: Line Items

Actions ▾  

<input type="checkbox"/>	Name ▲	Description	Required Quantity	Required U of M	Receiving Plant	Required Availability	Response Count	Splits	
<input type="checkbox"/>	 LI-100	Part 392228	1000	LB (pound)		Q4	0/0		
<input type="checkbox"/>	 LI-100	Part 392228	300	LB (pound)	Ohio	Q4	0/0	30.0%	
<input type="checkbox"/>	 LI-100	Part 392228	700	LB (pound)	Utah	Q4	0/0	70.0%	

Page 1 of 1 

No matter which kind of table you are working with, clicking the name of an item in the table (or clicking the Popup icon for an item) adds the item and its categories to the Context Navigator. See [Getting More Information about an Item \(Using the Context Navigator\)](#).

Selecting Rows in a Table

Many tables let you select the row or rows you want to work on. For example, from a table that lists your RFQs, you can select the rows for the RFQs that you want to delete or cancel. If you can select more than one row to work on at once, the table contains a check box next to each row, so you can check all the rows you want to work on. If you can only choose one row at a time, the table contains a button next to each row. You select a row by clicking its button. For almost all tables, the check boxes or button is the first, left-most, column in the table. The following graphic shows a standard table that lets you select multiple rows.


Check the heading check box (or icon) to select and deselect all rows in current table page.

Check individual rows to select the rows.

RFQs								
Actions		Name	Round	State	Owner	Quote Requested By Date	Response Status	Package
<input type="checkbox"/>		RFQ-1000	1	Started	John Smith	Feb 28, 2003 9:00:00 AM	0/4	Package-2244
<input type="checkbox"/>		RFQ-2000	2	Sent	Rebecca George	Feb 28, 2003 9:00:00 AM	1/3	
<input type="checkbox"/>		RFQ-3000	4	Response Completed	Alice Tenon	Feb 28, 2003 9:00:00 AM	0/2	
<input type="checkbox"/>		RFQ-4000	2	Started	Albert Swanson	Feb 28, 2003 9:00:00 AM	2/2	
<input type="checkbox"/>		RFQ-5000	1	Sent	Thomas Wataki	Feb 28, 2003 9:00:00 AM	0/2	
<input type="checkbox"/>		RFQ-6000	5	Started	Tim Chamberlain	Feb 28, 2003 9:00:00 AM	1/2	Package-2244

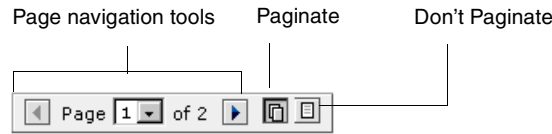
Page 1

- To select a row in a table, check the check box for the row. If you can only select one row at a time, the table contains buttons instead of check boxes. Click the button for the row.
- To select and deselect all rows in the current table page, check the check box in the column heading. A few tables contain an icon in the heading instead of a check box. You can click the icon to select and deselect all rows. If the table contains buttons instead of check boxes, indicating that you can only select one row at a time, you cannot select and deselect all rows.

Some tables do not remember rows that you select across pages within the table. For example, suppose a table spans 2 pages. You select an item on the first page, move to the second page and select an item, and then click Delete Selected. The system only deletes the item selected on the current table page. It does not remember the row that you selected on the first page. If you want to select items that are listed on different pages within a table, click  in the lower right corner of the page to remove pagination. (Note that this does not apply to pages built using the configurable table. The configurable table does remember selections across pages.)

Navigating Within a Table

Paginating a table means the table shows a certain number of rows per page. If the number of rows in the table exceeds that number, you must navigate to the next page to see the additional rows. By default, most tables create a new page every 11th row, but you can change the number of items displayed per page in Preferences. For details, see [Choosing a Pagination Preference](#).



- To move to another table page, click the left and right arrow buttons or choose a specific page from the Page drop-down list.
- To turn pagination off so all rows are listed on one page, click . When pagination is turned off, the navigation controls are removed because there is only one page. You must use the vertical scroll bars to see rows that aren't visible in the window.
- To turn pagination back on, click . The navigation controls return.

Filtering Table Data

There are two mechanisms for controlling which items are displayed in a table: a filter drop-down list and the tool. A table page can have one, both, or neither filter mechanism. (Some table pages might also have a custom filtering option. For help with such a custom filter option, click on that page.)

Filter drop-down
Filter Table Data tool

Name	Round	State	Workspace Folder(s)
RFQ-1000	1	Started	page- Aurora Dashboard
RFQ-2000	2	Sent	Taurus Suspension
RFQ-3000	4	Response Completed	Explorer Wheel
RFQ-4000	2	Started	
RFQ-5000	1	Sent	Jeep Rollbar
RFQ-6000	5	Started	page- Hybrid Generator

Page 1 of 10


The filter drop-down contains options for filtering the table rows that typically are not based on the column data. For example, the drop-down on the RFQs table lets you filter RFQs based on whether you own the RFQ, have been routed the RFQ, or are a member of a Team Central workspace that contains the RFQ.

The tool lets you filter table rows based on the column data. For example, on the RFQs page, buyers can use the tool to filter out RFQs in specific states. A buyer who wants to compare returned quotations might choose to display only RFQs that are in the Response Complete state.

If a table page contains both filtering mechanisms (the drop-down list and the tool), the page applies the drop-down list filter first and then the filter. Both filtering

mechanisms are temporary. If you go to another page and return to the table page, the filter is removed and all items are displayed again.


To filter a table using the filter drop-down

1. From the table page, choose an option in the filter drop-down list. For information on the filter drop-down for a specific table page, click  on that page.

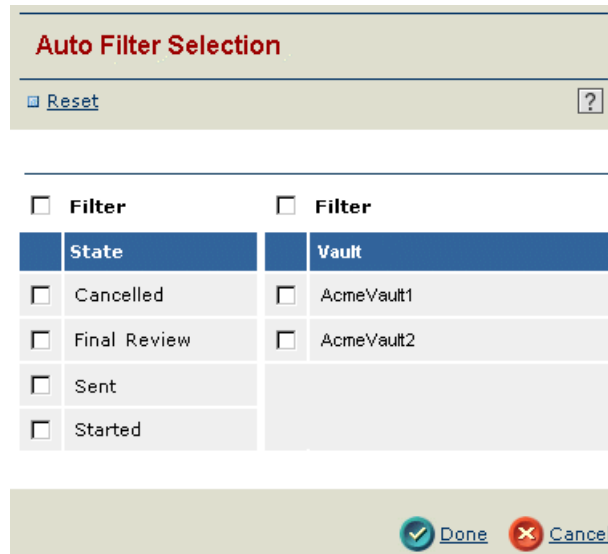
The table refreshes to show only the items that meet the filter criteria for the selected option.

2. To redisplay all items, choose **All** from the filter list.



To filter rows in a table using the tool

1. Click  on the page toolbar.

The Auto Filter Selection page opens.



Each column that you can filter on is listed in a blue heading row and has a Filter check box above the heading row. For example, if a table page is designed to let you filter out objects that are in particular states and in specific vaults, the Auto Filter Selection page would contain a State heading and a Vault heading, each with a Filter check box above it.

The unique data that is in each table column is listed under the heading. Only the data that is in the current table is listed, including data from all paginated pages in the table. For example, suppose the first page of the RFQ table contains only RFQs in the Started state and the second page contains only RFQs in the Sent state. When you click , the Auto Filter Selection page will only list Started and Sent under the State heading. Now suppose you return to the RFQ table page and select Routed from the filter drop-down list. The resulting RFQs are all in the Initial Review state. When you click the  tool, only the Initial Review state is listed under the State heading.

2. Check the column data whose rows you want displayed in the table.

For example, if you want to display only RFQs in the Started state, check Started.


When you click at least one column value, the Filter check box for that column is also checked. The Filter check box must be checked for the filter for that column to apply.

If filters are available for more than one column, each row in the table must meet the filter criteria for all the columns to be displayed. For example, suppose you check the Sent filter option under the State heading and the AcmeVault1 filter option under the Vault heading. For an item to display in the table, it must be in the Sent state *and* in AcmeVault1. An item that meets only one of the filters will not be included in the table.

3. Click Done.

The table page refreshes to display only the rows that contain the selected values.

4. To remove the filter and redisplay all rows again (the filter is removed automatically when you go to another page and return):





- a) Click the  tool again.
- b) From the Auto Filter Selection page, click **Reset**.
- c) Click **Done**.

Sorting Tables

The arrow to the right of a column heading name indicates which column the table is currently sorted on. If the arrow points up, the sort is in ascending order, a to z or 1 to n. If the arrow points down, the sort is descending, z to a or n to 1.

The up arrow in the Name heading indicates that this table is sorted by RFQ name, in ascending order.

RFQs

Actions 								
		Name 	Round	State	Owner	Quote Requested By Date	Response Status	Package
<input type="checkbox"/>		 RFQ-1000	1	Started	John Smith	Feb 28, 2003 9:00:00 AM	0/4	Package-2244
<input type="checkbox"/>		 RFQ-2000	2	Sent	Rebecca George	Feb 28, 2003 9:00:00 AM	1/3	

You can change how the rows in a table are sorted by clicking the column heading for the column you want to sort the rows by. The first time you click a heading, the rows are sorted in ascending order. To sort by descending order, click the column heading again. When you sort a table, the system always returns you to the first page of the table.

Tables cannot be sorted by columns that contain data that you can edit on that page.


Exporting Table Data

Many table pages include an Export tool in the page toolbar that lets you export the table data to a file. The export always includes all rows currently in the table, even those on subsequent pages for paginated tables. However, the export does not include rows that are not currently displayed because they have been filtered out of the table using one of the table filter mechanisms.

For details on how data is exported for each format, see [Choosing Your Export Format](#).

To export table data

1. Make sure you have selected the export format that you want using the Export Table Data Format option in Preferences.

2. Click  on the table page toolbar.

If you chose CSV or Text as your preferred export format, a dialog appears asking if you want to open or save the report.

If you chose HTML as your export format, the table data opens in a new browser window as an Excel file. (If you chose HTML and are in Netscape, the system handles the export as a CSV file due to a limitation with the Netscape browser.)

3. Use this table to save or open the file.

If the export format is:	Steps to open or save the file:
CSV	<ul style="list-style-type: none">• To open the file in Excel, click Open. The file opens in Excel if you have Excel installed. Once open, you can work with the file and save it as needed.• To save the file, click Save and save the file. The default extension is *.csv.
HTML	From the Excel menu in the browser, save the file as needed.
Text	<ul style="list-style-type: none">• To open the file in your default text editor, click Open. The file opens in Excel if you have Excel installed. Once open, you can work with the file and save it as needed.• To save the file, click Save and save the file. The default extension is *.txt.

Getting More Information about an Item (Using the Context Navigator)

You can drill down to get more information about any item whose name is underlined. The applications display details for the item using the Context Navigator and the page to the right of the Navigator. For example, when you click the name of a package on this My Packages table page, the Context Navigator opens and displays categories of information for the package. Basic Properties for the package are displayed on the right.

My Packages All

Actions ?

Name	State	Owner	Response Status	RFQ	Workspace Folder(s)
<u>Pkg100</u>	Started		0/0	0	Folder1 Subfolder1A Subfolder1B

Page 1 of 1

Pkg100 - : Properties

Actions ?

Name	Pkg100
Workspace Folder	Folder1 Subfolder1A Subfolder1B
Comments	Please see attached disclaimer.
Description	Package for assembly 2922822
Response Status	0/0

This section describes how the Context Navigator works and how to use it to find the information you are looking for:

- *Context Navigator Displays Category List for Selected Item*
- *Viewed Items Insert into Category List*
- *Some Item Details Appear in a Popup Window*
- *Navigating In and Managing the Context Navigator*
- *Viewing Details for Items with a Hierarchical Structure*

Context Navigator Displays Category List for Selected Item

The Context Navigator displays related categories of information about selected items. For example, this graphic shows the Context Navigator with the category list that is displayed when a person views details for a part family.

Name of the item whose details are being viewed

CM-202030

- ▢ Approvals
- ▢ Parts
- ▢ Reference Documents
- ▢ Route
- ▢ History
- ▢ Lifecycle

Category list for selected item
Categories change depending on item type and user's access

Different types of items have different categories in their category lists. Categories for an item also can vary depending on your access rights to the item. Factors determining access rights typically include the roles you are assigned, whether your company has responsibility for the item, and whether you are assigned ownership. For example, when buyers view details for an RFQ created within their company, they see many categories. When a supplier who receives the RFQ views details for it, the supplier sees only a couple of categories. Most RFQ categories contain information that should be viewed only by the buyer.

You view an item's information for a category by clicking it. The page for the category appears to the right of the Context Navigator. Most categories display table pages with lists of items in the category for the selected item. You can view details for these table items and continue drilling down to see details for related objects. For example, the ECRs category for an RFQ displays all ECRs submitted for the RFQ. You can view details for ECRs just as you viewed details for the RFQ. A few specialized categories display non-tabular information, such as Properties, Lifecycle, and History.

The selected category is highlighted in blue

RFQ-5000

- ▢ Attachments
- ▢ Discussions
- ▢ ECRs
- ▢ History
- ▢ Lifecycle
- ▢ Line Item Attribute Groups
- ▢ Line Item UDAs
- ▢ Line Items
- ▢ Previous Rounds
- ▢ Quotations
- ▢ Supplier Header Attributes
- ▢ Suppliers
- ▢ Versions

RFQ-5000: ECRs

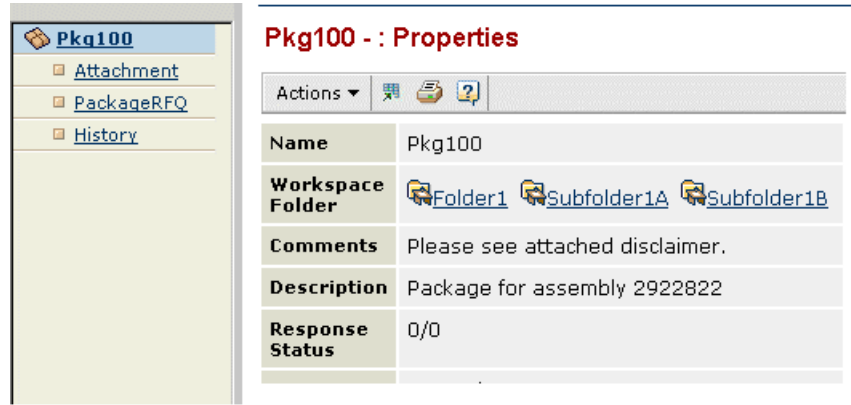
Actions ▾

	Name ▾	RFQ Line Item	Supplier Organization	Originator	State	
<input type="checkbox"/>	ECR-2123	RLI-5000	Ford	Clark, Rex	Buyer Evaluation	
<input type="checkbox"/>	ECR-2323	RLI-5011	Honda	Wedgewood, Peter	Buyer Evaluation	
<input type="checkbox"/>	ECR-4567	RLI-5034	Honda	Maguire, Padraig	Buyer Evaluation	
<input type="checkbox"/>	ECR-5000	RLI-5056	Subaru	Dorval, Vera	Buyer Evaluation	
<input type="checkbox"/>	ECR-6000	RLI-5023	Acme Supply	Clark, Rex	Buyer Evaluation	
<input type="checkbox"/>	ECR-5000	RLI-5010	Ford	Clark, Rex	Buyer Evaluation	

Page 1 of 10

When you click the name of the item in the Context Navigator, the item's Properties page appears on the right. The Properties page shows the item's main attributes. The item's name is automatically highlighted when an item and its categories first appear in the Context Navigator, which is why the Properties page always shows first when you access an item's details.

Clicking the item's name in the Context Navigator shows the item's Properties page
 An item's name is selected automatically when you view its details



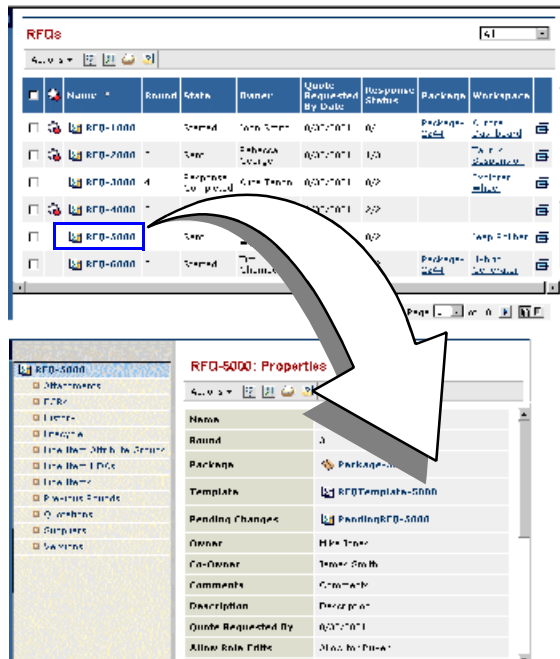
One exception to clicking an item's name to view its Properties page is items that appear in the Structure Navigator, such as folders in Team Central and Program Central. For more information on working with structured items and the Structure Navigator, see [Viewing Details for Items with a Hierarchical Structure](#).

Viewed Items Insert into Category List

This section describes how items and their category lists are inserted under a Context Navigator category as you view details about the items.

When you first log into a MatrixOne application, you'll typically begin by clicking a link from the My Desk menu. My Desk menu links display table pages that list a particular type of item relevant to your work. When you click the name of an item listed in one of these top-level table pages, the Context Navigator and associated Properties page replace the table page in the main window. The Context Navigator contains the category list for the selected item.

Clicking the name of an item in a top-level table opens the Context Navigator with the item's categories listed.



When clicked, most categories display a table of items related to the viewed item (for example, clicking the ECRs category for an RFQ displays all ECRs for the RFQ).

Clicking the name of an item in a category table inserts the name of that item and its category list under the category the table was called from. Similarly, clicking the name of an item in a second-level category table inserts the name of that item and its category list under the second-level category and so on.

For example, suppose you click the ECRs category from within the category list for an RFQ. The ECRs table page displays to the right, showing all ECRs for the RFQ. When you click the name of an ECR, the ECR and its categories are inserted into the Context Navigator just under the ECRs category, as shown below. When an item is first added to the Context Navigator, its category list is expanded and its name is selected. The category list for any other items added previously to the Context Navigator are contracted.

If the table was called from a category, the clicked item and its category list are inserted under that category in the Context Navigator.

In this example, the ECRs table page is called from the ECR category for an RFQ. When an ECR is clicked, its category list is inserted into the Context Navigator, under the ECRs category.

Contract (Down) arrows let you contract the category list for the ECR or all viewed items under the ECRs category.

The screenshot displays two panels. The top panel, titled 'RFQ-5000: ECRs', contains a table with the following data:

Name	PLU Issue Title	Supplier Organization	Originator	State
ECR-2123	PLU F110	First	Clark, Rex	Buyer Post 4 min
ECR-2323	PLU F111	Home	Wedge, Mcc. K...	Buyer Post 4 min
ECR-4567	PLU F112	Home	Maguire, K. F...	Buyer Post 4 min
ECR-5000	PLU F113	Home	Clark, Rex	Buyer Post 4 min
ECR-6100	PLU F114	Home	Clark, Rex	Buyer Post 4 min
ECR-5000	PLU F110	First	Clark, Rex	Buyer Post 4 min

The bottom panel, titled 'ECR-5000: Properties', shows the following details:

- Name: ECR-5000
- Type: ECR
- State: Review
- Reason for Hold or Cancel: Schedule delay.
- Product Line: [ProductLine-5000](#)
- Owner: Smith, Michael
- Originator: Clark, Rex
- Originated: 5/4/2001
- Modified: 5/10/2001
- Category of Change:
- Title: ECR Description

The Context Navigator on the left shows the 'RFQ-5000' tree with 'ECRs' expanded to show 'ECR-2123' selected. A large arrow points from the 'ECR-5000' row in the table to the 'ECR-5000' entry in the Context Navigator.

When a viewed item and its category list is inserted under a Context Navigator category, a ▼ appears to the left of the category name, allowing you to contract the list of inserted items and their category list. Each inserted item also has an arrow to the left of the name, allowing you to expand and contract its category list.

Note that some categories are set up so all items within it, and their category list, are automatically inserted under the category. You don't have to view details for the items to have them inserted into the Context Navigator. The Folder and Subfolder categories in Team Central and Program Central are configured like this. This means that if a Folder or Subfolder category has at least one folder in it, an arrow appears to the left of it, even if you haven't viewed details for any folders.

Adding items and their category list to the Context Navigator as you view their details helps you keep track of which item the table page relates to. For example, in the above graphic, listing the selected ECR and its category list under the ECRs category helps you

remember that the ECR is for RFQ-5000 and not some other RFQ you worked on recently. Additionally, as you view details for other ECRs submitted for the RFQ, the system continues to insert their names and category lists under the RFQ's ECRs category. The inserted items become a quick reference so you can easily go back to details that you previously viewed.

Some Item Details Appear in a Popup Window

The previous section describes what happens when you click the name of a “main” item on a table page: the item is added to the Context Navigator on the main application window. The item’s Properties page replaces the table page from which you selected the item. There are cases when details for an item appear in a popup window instead of the main application window. In this case, the page from which you selected the item remains in the main application window.

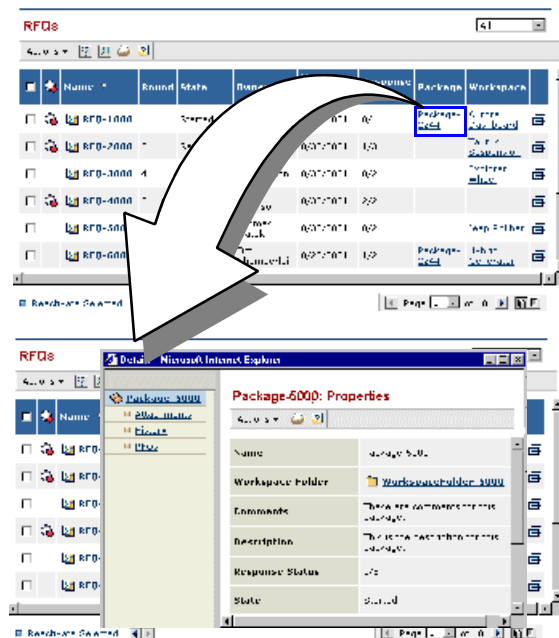
When the Context Navigator is in a popup window, it behaves the same as when it is in the main application window. For example, items clicked from a category table are inserted under the category in the Context Navigator.

Item details display in a popup window and not in the application window when any of these conditions apply:

- The selected item is not a member of the category represented by the current table page.


For example, when you click the name of an RFQ from an RFQs table page, the RFQ name and category list appear in the Context Navigator in the main application window. But RFQs pages also list packages and workspaces for the RFQs and you can click their names to see details. The packages and workspaces are not the main items in the table and are merely associated items for the RFQs. So when you click the name of a package or workspace, their details display in a Context Navigator in a popup window, as shown below for a package.

Clicking the name of a related item in a table opens a popup window with the item’s category list in the Context Navigator.



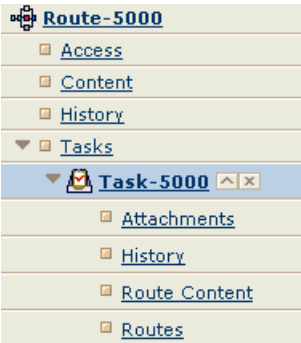


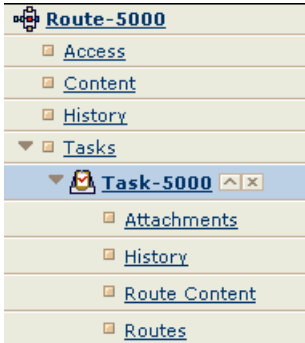
- The selected item is not on a table page.


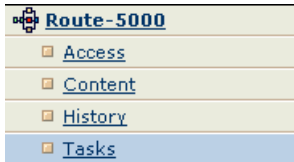


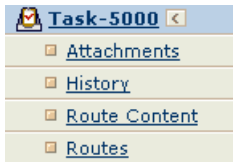





For example, many Properties pages list items related to the current item. For example, the Properties page for a part might list an associated ECR. If you click the name of the ECR on the Properties page, its categories appear in a popup window.

- The Popup  icon for an item in a table is clicked.
Most tables contain a column on the right side that contains a Popup icon for each item in the table. You can click this icon to display the item's details in a popup window instead of replacing the current table in the main application window. This is handy if you want to continue working on the current table and therefore don't want to replace it. You can also use it to compare details about two different items and to navigate multiple items.

Navigating In and Managing the Context Navigator

As you view details for additional items related to the top-level item in the Context Navigator, the list of items and category lists lengthens. The Context Navigator contains controls that let you expand and contract the lists, remove items from the Navigator, and focus in on specific items. You can resize the width of the Navigation pane as you can most windows.

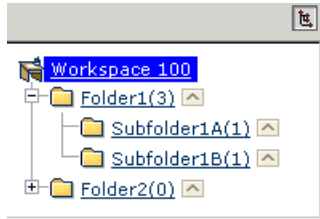
To do this:	Perform these steps:
<p>Contract an item's category list or the list of viewed items under a category. For example, to contract the category list for Task-5000...</p> 	<ul style="list-style-type: none"> • Click ▼ to the left of the item or category name. The list contracts and ▼ is replaced with ► so you can expand it again. 
<p>Expand an item's category list or the list of viewed items under a category. For example, to expand the category list for Task-5000...</p> 	<ul style="list-style-type: none"> • Click ► to the left of the item or category name. The list expands and ► is replaced with ▼ so you can contract it again. 

To do this:	Perform these steps:
<p>Close an item's category list. For example, to close the category list for Task-5000...</p>	<ul style="list-style-type: none"> Click  to the right of the item name. The item name and its category list are removed from the Context Navigator. The item is not deleted from the database or removed from the top-level item. 
<p>Move an item to the top level of the Context Navigator, making it the root item for the Navigator. For example, to move Task-5000 to the top level of the Context Navigator and remove the route and its categories...</p>	<ul style="list-style-type: none"> Click  to the right of the item name. The item and its category list moves to the top of the Context Navigator. All items and category lists that were above the item are removed from the Context Navigator. A  appears next to the item's name, allowing you to return to the previous listing. 
<p>Go back to the previous display of category lists. For example, to return to the category list for Route-5000 after moving a task to the top...</p>	<ul style="list-style-type: none"> Click  to the right of the item name. The Context Navigator displays the items and category lists that were previously displayed (before you clicked the Move to Top arrow). You can continue to click  until you reach the original top-level item, which has no . For example in the graphic below, Route-5000 has no  because it was the original top-level item in the Context Navigator. 

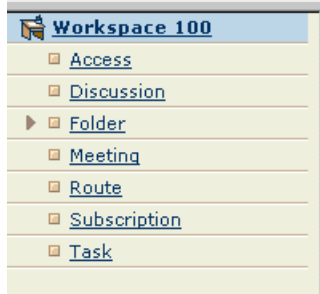
Viewing Details for Items with a Hierarchical Structure

Some MatrixOne applications have items with a hierarchical structure, which we'll refer to as structured items. For example, workspaces in MatrixOne Team Central and projects in MatrixOne Program Central are hierarchical: they have folders, which can each have subfolders, and each subfolder can have subfolders and so on. When you view details for an item that has a hierarchical structure defined for it, you can view the hierarchical items in a Structure Navigator above the Context Navigator. The Structure Navigator contains only items within the defined hierarchy and displays only their names, not their categories, allowing you to quickly navigate to the pertinent items in the hierarchy.

Structure Navigator
(currently only available when you work in Team Central workspaces and Program Central projects)



Context Navigator



Workspace 100 : Properties

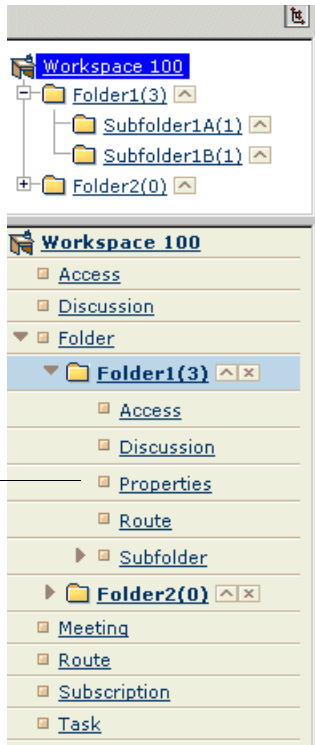
Actions	
Name	Workspace 100
Template	
Image	
Owner	Comp1 Buyer1,Joe1
Originated	Feb 26, 2003 10:30:22 AM
State	Active
Buyer Desk	
Description	Design team for part 929288-A

For example, when you view details for a workspace in Team Central, the Context Navigator displays categories for the workspace as usual. In addition, you can display the Structure Navigator to see the names of the hierarchical items in the workspace, which are its folders and subfolders. Next to the name of folders and subfolders, the Structure Navigator displays a count of all content in the folder and the subfolders within it, not counting the subfolders themselves. This content count is a special feature for Team Central folders and subfolders and is not available for all structured items.

The Structure Navigator displays items in a Windows Explorer-like tree. You can expand and contract lists of items by clicking + and - signs. The lists update as you work in the application. For example, when you add a folder, it is added to the Structure Navigator.

When you click the name of a structured item in either Navigator, the main table page for that type of item displays on the right.

Clicking a folder name displays the Content page instead of Properties so Properties is an additional category.



Folder1 : Content

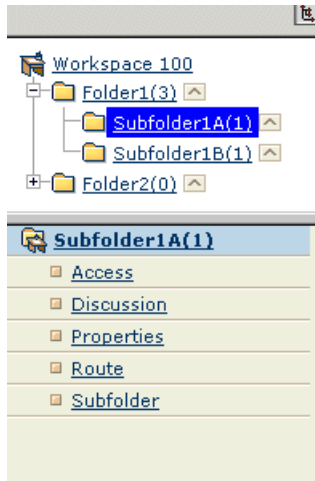
Actions

<input type="checkbox"/>	<input type="checkbox"/>	Name	Ver	Rev	Date	Actions
<input type="checkbox"/>	<input type="checkbox"/>	Pkq100 Package for assembly 2922822		-	Feb 26, 2003 11:11:44 AM	

Page 1 of 1

The items you select in the Structure Navigator are similarly selected in the Context Navigator but the reverse is not true. Selecting items in the Context Navigator has no effect on the Structure Navigator. For example, when you click a subfolder name in the Structure Navigator, the Contents page for the subfolder displays on the right and the subfolder and its category list are listed at the top of the Context Navigator. This lets you quickly see the most pertinent information about the folder (its content) and gives you easy access to related information for the folder (its categories).

Clicking an item in the Structure Navigator moves it to the top of the Context Navigator.



Subfolder1A : Content


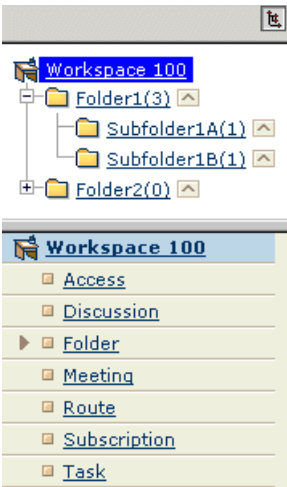


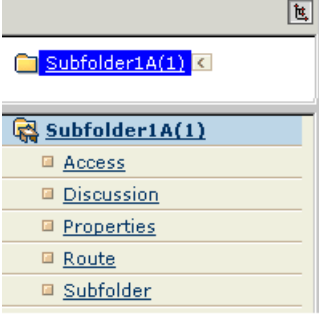




Actions

<input type="checkbox"/>	<input type="checkbox"/>	Name	Ver	Rev	Date	Actions
<input type="checkbox"/>	<input type="checkbox"/>	Pkq100 Package for assembly 2922822		-	Feb 26, 2003 11:11:44 AM	

Page 1 of 1

Like the Context Navigator, you can move items to the top of the Structure Navigator and then use a Back arrow to return to the previous item list. When you move an item to the top of the Structure Navigator, it also moves to the top of the Context Navigator.

This table summarizes steps for navigating within and managing the Structure Navigator. Note that you can also resize the height of the Structure Navigator by dragging the border between the two navigators.

To do this in the Structure Navigator:	Perform these steps:
<p>See the main table page for that type of structured item. For example, to see the Contents page for a folder or subfolder.</p>	<ul style="list-style-type: none"> Click the name of the folder or subfolder in either Navigator.
<p>Expand the list of items one level down in the hierarchy. For example, to expand the list of subfolders under a folder.</p>	<ul style="list-style-type: none"> Click the + sign to the left of the item name. The item list expands and the + sign is replaced with a - sign so you can contract it again.
<p>Contract an item list. For example, to contract the list of subfolders under a folder.</p>	<ul style="list-style-type: none"> Click the - sign to the left of the item name. The item list contracts and the - sign is replaced with a + sign so you can expand it again.
<p>Show or hide the Structure Navigator. Note that when you navigate to an item that contains structured items (workspaces in Team Central or projects in Program Central), the Structure Navigator is hidden.</p>	<ul style="list-style-type: none"> Click  in the upper right corner of the Navigation pane.
<p>Move an item to the top level of the Structure Navigator. For example, to move Subfolder1A to the top level of the Structure Navigator...</p> 	<ul style="list-style-type: none"> Click  to the right of the item name. The item and the items under it in the hierarchy move to the top of the Structure Navigator. The item also moves to the top of the Context Navigator. A  appears next to the item's name, allowing you to return to the previous listing. 
<p>Go back to the previous item list.</p>	<ul style="list-style-type: none"> Click  to the right of the item's name. The Structure Navigator displays the items that were previously displayed (before you clicked ). You can continue to click  until you reach the original top-level item, which has no .

Sending and Receiving Messages and System Notifications

Messages within MatrixOne applications are called IconMail. Use IconMail to send messages to and receive messages from other MatrixOne application users. You also receive system notifications through IconMail, such as notifications that you have an active task or that one of your routes has been completed. Many notifications contain an attachment that let you quickly access information about the item the message is about. For example, in Sourcing Central, when a buyer sends a Request for Quote to suppliers, the suppliers receive notification in IconMail and the message includes the quotation as an attachment. The supplier can click the attachment to get information about the quotation and the associated Request for Quote. Many IconMail messages also contain a URL link that when clicked, brings up the details for the item the message is about.

If an email address is entered in your profile, then you will receive all IconMail messages at your email address as well as your IconMail inbox. If a message has an attached item, the email contains a hyperlinked URL. Clicking the link (or entering it in the Web browser) opens the tree and Properties page for the item. If you aren't already logged in, you must log in before viewing the information.

This section contains these topics:

- [Listing Your Incoming Messages](#)
- [Reading Messages](#)
- [Sending a New Message](#)
- [Replying To and Forwarding Messages](#)

Listing Your Incoming Messages

The messages you receive can be notifications generated automatically by the system, such as a notification that you have been assigned a task, or messages created by individual users.

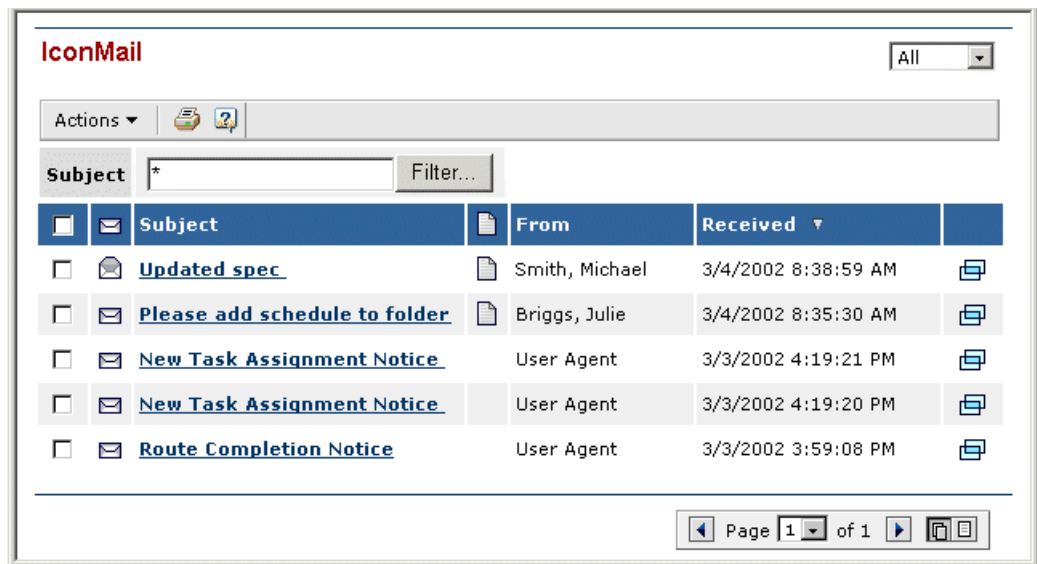
To have the system send you notifications in a specific language, use the System Generated Mail Preference list in the Edit Person Details page (click Tools>Edit Profile from the Tools menu on the global toolbar). If you do not choose a preferred language (or if the option is not available for the application you are using), the system notifications may contain messages translated in several languages or may be in just one language. The notifications may not include the one you have your browser set to.

System notifications list only the recipients who have chosen the same language preference as the one you choose. The system may have sent the same notification to other recipients in different languages.

To list the messages that have been sent to you

1. Click **Tools>IconMail** from the global toolbar.

The IconMail page opens, listing all messages sent to you. The information for each message is described below.



Read/Unread—The icons in the first column indicate if you have opened the message. An open envelope means you have opened the message. A closed envelope means you have not.

Subject—The subject entered by the person who sent the message. To open a message, click the subject.

Attachment—A document icon indicates that there is an item, such as a part or RFQ, attached to the message. To see information about the item, open the message by clicking the subject. Only system-generated notifications contain attachments. Messages created by users cannot have attachments.

From—The user name of the person who sent the message.

Received—The date and time you received the message.

2. Use the **Subject** box and drop-down list at the top of the page to filter the list of messages so you can more easily find the ones you need to work with. You can use as many of the filter criteria as needed. The IconMail page shows only the messages that meet all the criteria you specify.
 - To see only messages that contain specific characters in the subject of the message, enter the characters in the **Subject** box and use the wildcard * to replace characters that you don't include. For example, to see only messages with subjects that contain "Route", enter "*Route*" in the Subject box and click **Filter**.
 - To show only messages that you have not read (not opened), choose **UnRead** from the drop-down list in the upper right corner.
 - To show only messages that you have read (opened), choose **Read** from the drop-down list.
 - To show both read and unread messages, choose **All** from the drop-down list.
3. To read a message, click the **Subject**.
4. Work with the messages as needed using the following commands from the Actions menu:
 - To create a new message, click **Create Message**.
 - To delete a message, check the message and click **Delete**.

– To check for mail that has arrived since you opened the IconMail page, click **Check for Messages**.

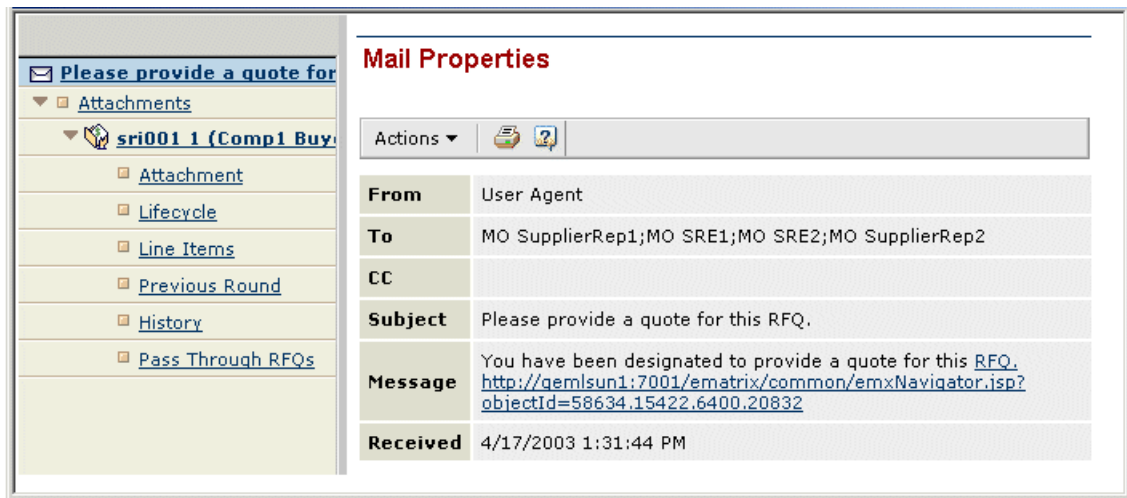
Reading Messages

You can read any message that was sent to you.

To read an IconMail message

1. Click **Tools>IconMail** from the global toolbar.
2. From the IconMail page, click the **Subject** of the message you want to read.

The tree and Properties page for the message opens. The page displays the sender's user name, the user names of all recipients, the time and date the message was received, the subject, and the message content.



3. To view details about any objects attached to the message:
 - a) Click **Attachments** from the category list for the message.
 - b) From the Attachments page, click the name of the attached item.

The category list and Properties page opens for the item. You can view and work with the item as you normally would, viewing the information in the categories and editing information if you have edit access.



- c) To return to the Attachments page, click Attachments in the category list for the message. To return to the Mail Properties page, click the subject of the message at the top of the category list.
4. From the Mail Properties page, work with the message as needed using the following commands from the Actions menu:
- To reply to the sender, click **Reply**.
 - To reply to the sender and all other recipients, click **Reply All**.
 - To forward the message to another person, click **Forward**.
 - To delete the message, click **Delete**. This deletes the current message and returns you to the IconMail page.
- For details, see [Replying To and Forwarding Messages](#).

Sending a New Message

When you send a message, the message appears on the person's IconMail page. If the person's profile has an email address, the person also receives it in her/his email application. Currently, messages that you create cannot contain attachments.

To send a new message

1. Click **Tools>IconMail** from the global toolbar.
2. From the Actions menu on the IconMail page, click **Create Message**.
The Create Message page opens.

Create Message

Fields in red italics are required

To ... Clear

CC ... Clear

Subject

Message

Done Cancel

3. Choose the people you want to send the message to by entering their user name (not their email address) in the **To** box. When sending mail to multiple users, enter each name separated with a semi-colon (;) but no space.

Or

Choose people by searching for them using the steps below. Depending on how your system has been configured, the search includes people in your company and can include collaboration partners, suppliers, and customers.


- a) Click next to the **To** box.
 - b) In the Find dialog, enter part or all of the person's user name, first, or last name. Depending on your system setup, the search may be case sensitive. Use the * wildcard to represent any characters in the name that you do not enter. For example, to search for Margaret Greene, you could enter "M*" in the first name box and "Greene" in the last name box.
 - c) Using the Search In options, choose the kinds of companies you want to search in: My Company, Customers, Suppliers, Collaboration Partners. (Your system may be configured so some or all of these options aren't available.)
 - d) Click **Find**.
 - e) From the Select page, check the people you want to send the message to.
 - f) Click **Done**.
4. In the **CC** box, enter names of the people you want to copy on the message, or click to search for people and follow the directions in Step 3.
 5. Enter a **Subject** for the message.
 6. Enter the message in the **Message** box.
 7. Click **Done**.

If the person's profile includes an email address, the person receives the message as email also.

Replying To and Forwarding Messages

All users can reply to or forward any message that they receive.

To reply to or forward IconMail

1. Click **Tools>IconMail** from the global toolbar.
2. From the IconMail page, click the **Subject** of the message you want to forward or reply to.
The category list and Properties page for the message opens.
3. To reply to the sender, click **Reply** from the page Actions menu and skip to Step 6.
The Reply Message page opens with the sender's user name in the To box and the original subject in the Subject box, prefixed with RE:. The text of the original message is placed in the Message field of your new message.
4. To reply to the sender and all other recipients, click **Reply All** from the page Actions menu and skip to Step 6.
The Reply All Message opens with the user names of the sender and all other recipients in the To and CC boxes and the original subject in the Subject box, prefixed with RE:. The text of the original message is placed in the Message field of your new message.
5. To forward the message to another person:
 - a) Click **Forward** from the page Actions menu.
The Forward Message page opens with the original subject in the Subject box, prefixed with FW:. The text of the original message is placed in the Message field of your new message.
 - b) Enter recipients in the **To** and **CC** boxes as needed. When sending mail to multiple users, enter each name separated with a semi-colon (;) but no space. Or click  to choose recipients by searching. For details, see [Sending a New Message](#).
6. Edit the **Subject** for the message, if needed.
7. Enter your message in the **Message** box.
8. Click **Done**.
If the person's profile includes an email address, the person receives the message as email also. If there is an attached object, the message includes a link that opens the tree and Properties page for the attached object.

Changing Your Password

Anyone who logs into the MatrixOne applications can change the password they use to log in.

To change your password

1. Click **Change Password** from the Tools menu.

The screenshot shows a web form titled "Change Password". At the top, there is a note: "Fields in red italics are required" with a question mark icon. The form contains the following fields:

<i>Username</i>	Test Everything
<i>Current Password</i>	<input type="password"/>
<i>New Password</i>	<input type="password"/>
<i>Verify New Password</i>	<input type="password"/>

At the bottom of the form, there are two buttons: "Submit" (with a green checkmark icon) and "Cancel" (with a red X icon).

2. On the Change Password page, enter your **Current Password**.
3. Enter your **New Password**.

Passwords can contain spaces. Your system may be configured so passwords must meet certain criteria. For example, passwords may have to contain a minimum number of characters or may have to contain both alphabetic and numeric characters. If you enter a password that doesn't meet your system's criteria, a message displays that tells you what is wrong with the password. Enter a new password with the appropriate corrections.
4. Then confirm the password by entering it again in **Verify New Password**.
5. Click **Submit**.

Finding Software Versions

To find the software version you are using

- Click the **Tools>About** from the global toolbar.

The About page lists the version numbers for MatrixOne application software and underlying “infrastructure” software.

About

?

Application Vendor	MatrixOne Inc.
Applications	
Framework	10-5-0-0
Team Central	10-5-0-0
Sourcing Central	10-5-0-0
Engineering Central	10-5-0-0
Infrastructure	
Ematrix Version	10.5.0.0-Global
OS Name	Windows NT
OS Version	5.0
OS Architecture	x86
Java Vendor	Sun Microsystems Inc.
Java Version	1.2.2
DB Connection	NEWAPPS
DB Vendor	Oracle

Done

Choosing Preferences

Each user can customize general preferences that pertain to all MatrixOne applications that you have installed. The following are included under the General heading on the Preferences page.

Choosing Your Home Page

Choosing Your Export Format

Choosing Preferred Currency and Unit of Measure

Choosing a Language for Notifications

Choosing a Default Vault for Searching

Choosing a Pagination Preference

Choosing a Time Zone Preference

There are some preferences that are specific to a single MatrixOne application and are listed under a application-specific heading. For details, see the user guide for that application.

Choosing Your Home Page

The Home page is the page that appears when you log in and when you click the Home tool in the global toolbar. Your system has been set up to display a particular page when you log in. If you prefer to see a page other than the default, you can choose any of the My Desk items as your preferred Home page.


To choose your preferred Home page

1. Click **Tools>Preferences** from the global toolbar.
2. From the General category of the Preferences page, click **Home Page**.
3. Choose the page that you want to see when you log into the MatrixOne application and when you click the Home tool. All options on your My Desk menu are listed. If you choose Default, the system displays the page that has been configured as the default page for your system. If you choose PowerView, the system displays the PowerView page that has been configured by your Business Administrator. For details, see [Using Desktop PowerView](#).



4. Click **Apply** or **Done** to save your selection. Clicking Apply leaves the Preferences popup open so you can set other preferences. Clicking Done closes it.

Choosing Your Export Format

Many table pages include an Export  tool so you can export the table data to a file. Use the Export Table Data Format option in Preferences to choose the file format that you want to use whenever you use the Export tool. You can choose CSV, HTML, or Text. The graphics below shows samples of a parts table exported using each format.

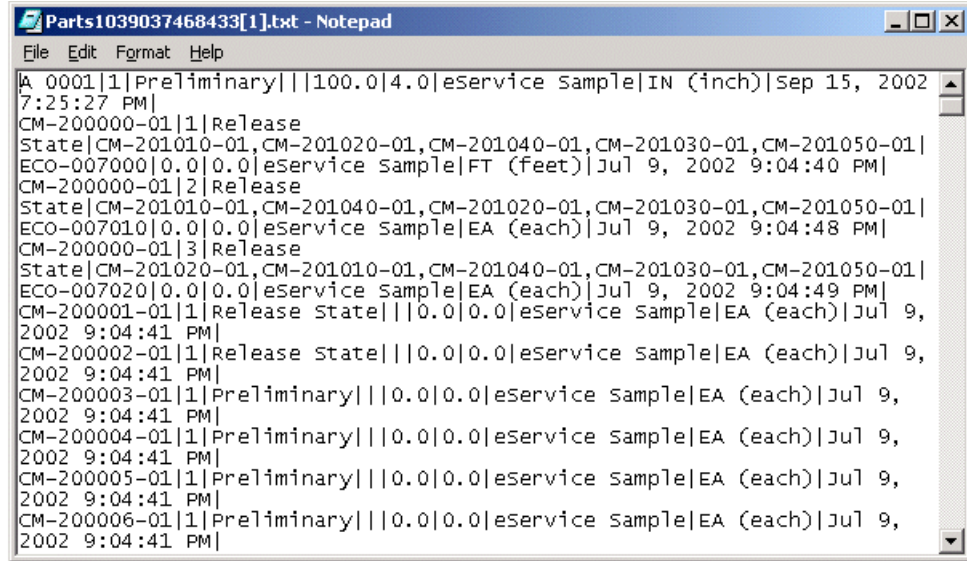
CSV format:

	A	B	C	D	E	F	G	H
1	A 0001	1	Preliminary			100	4.0	eService Sample
2	CM-200000-01	1	Release State	CM-201010-01	ECO-007000	0	0.0	eService Sample
3	CM-200000-01	2	Release State	CM-201010-01	ECO-007010	0	0.0	eService Sample
4	CM-200000-01	3	Release State	CM-201020-01	ECO-007020	0	0.0	eService Sample
5	CM-200001-01	1	Release State			0	0.0	eService Sample
6	CM-200002-01	1	Release State			0	0.0	eService Sample
7	CM-200003-01	1	Preliminary			0	0.0	eService Sample
8	CM-200004-01	1	Preliminary			0	0.0	eService Sample
9	CM-200005-01	1	Preliminary			0	0.0	eService Sample
10	CM-200006-01	1	Preliminary			0	0.0	eService Sample
11	CM-200007-01	1	Preliminary			0	0.0	eService Sample
12	CM-200008-01	1	Preliminary			0	0.0	eService Sample
13	CM-200009-01	1	Preliminary			0	0.0	eService Sample
14	CM-200010-01	1	Preliminary			0	0.0	eService Sample

HTML format:

	A	B	C	D	E	F	G	H	I	J	K	L
	Name	Rev	State	State	EBOM	ECO	Estimated Cost	Weight	Vault			
2	TM-307070-02	A	Create				12	3	eService Sample			
4	TM-307080-01	A	Create				12	3	eService Sample			
6	TM-307080-02	A	Create				12	3	eService Sample			
8	TM-307090-01	A	Create				12	3	eService Sample			
10	TM-307090-01	B	Create				12	3	eService Sample			
12	TM-307090-02	A	Create				12	3	eService Sample			
14	TM-307100-01	A	Create				12	3	eService Sample			
16	TM-307100-01	B	Create				12	3	eService Sample			
18	TM-307110-01	A	Create				12	3	eService Sample			
20	TM-307110-01S	A	Create				12	3	eService Sample			

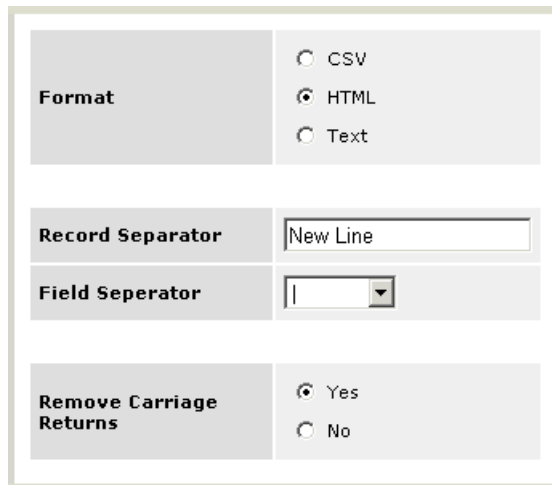
Text format with | as field separator and comma as the multi-value separator. Record separator is new line.



To choose the format for exporting table data

1. Click **Tools>Preferences** from the global toolbar.
2. From the General category of the Preferences page, click **Export Table Data Format**.

The page for choosing your export format appears.




3. Based on the following table, choose the format you want.


Format	Export Description	Field Separator	Record Separator	Remove Carriage Returns	Other Information
CSV	Gives you the option to save the table data to a flat file in CSV format or open it in Excel. Export does not include columns with icons.	comma (,) Ignores the Field Separator selection in preferences.	new line (\n) Ignores the Record Separator selection in preferences.	Column values are always placed within quotes, which makes the values displayed in same cell in Excel, even if it contains carriage returns. Ignores preference setting.	If the data is saved directly to a file without opening it in Excel, the values are wrapped with double quotes (“...”). If there are leading zeros in an all numeric column value, it is wrapped as “nnnn”, where nnnn is the actual value. For example, if the value is 0001124, the value is printed as = “0001124”. This special wrapping of values is required to preserve the formatting when opened in Excel.
HTML	Opens table data in a new browser window as an Excel file. While displaying the Excel file, the images and styles are maintained but hyperlinks are inactive.	Ignores the Field Separator selection in preferences.	Ignores the Record Separator selection in preferences.	Ignores preference setting.	HTML report format is not supported in the Netscape browser due to a browser limitation. If you choose HTML and then attempt to export using Netscape, the system uses the CSV format.
Text	Gives you the option to save the table data in a flat file with delimiters defined in preferences, or open it in the default text editor. Export does not include columns with icons.	Uses the Field Separator preference setting for separating the column values. By default, the Field Separator is a comma. If there are multiple values within a single cell, these values are separated by a comma (,). If you define the Field Separator as a comma (,), the multiple value separator is .	The Record Separator preference setting is used to separate the table data rows. It is a carriage return with a new line (\r\n) by default.	Remove Carriage Returns preference setting is used. If the preference is set to Yes (the default), all carriage returns are replaced with a blank space.	—

- If you chose Text format, choose the remaining preferences. These preferences are ignored for the CSV and HTML formats.
Field Separator—The character used to separate column data for each item.
Record Separator—The character used to separate information for each item or row.
Remove Carriage Return—To replace carriage returns with a space, choose Yes.
- Click **Apply** or **Done** to save your selection. Clicking Apply leaves the Preferences popup open so you can set other preferences. Clicking Done closes it.

Choosing Preferred Currency and Unit of Measure

The data for some fields shown in MatrixOne applications is based on a particular currency or unit of measure, such as unit price and weight. The system displays this data based on the currency/unit of measure used by the person who enters the data. While viewing a page that has these kinds of fields and that has a  tool on the page toolbar,

you can open a new window and see the field values converted to a different currency or unit of measure (for example, change from English units to Metric or vice versa).

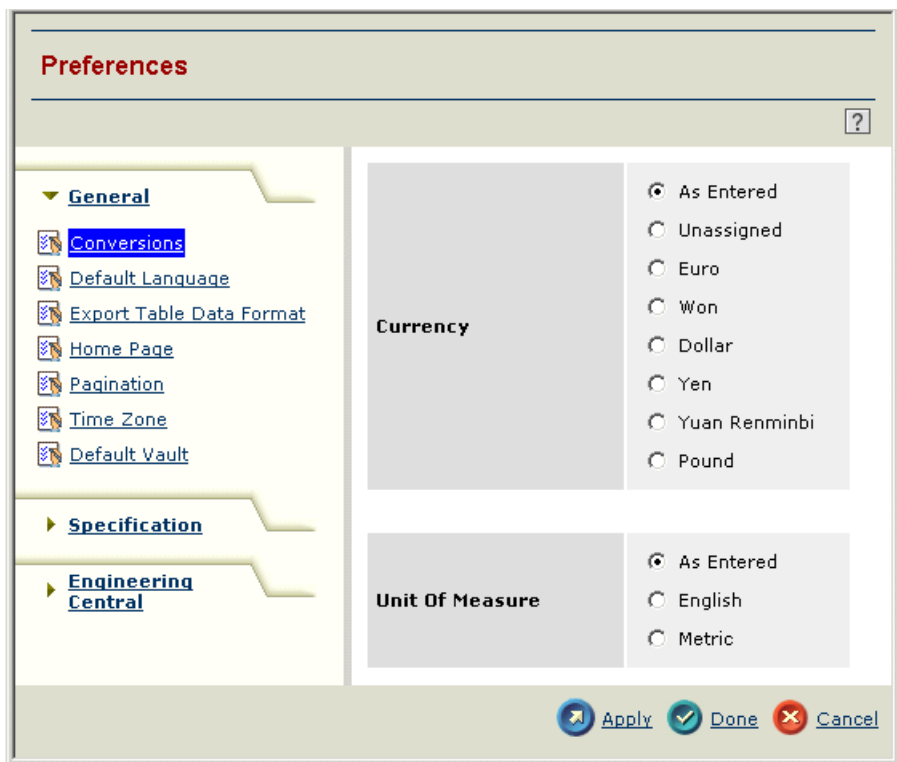
This procedure describes how to choose the currency and unit of measure that you want when you click the  tool on a page.

Exchange rates must be defined in order to convert currency data. For details, see “Maintaining Currency Exchange Rates” in the *Common Components Help*. For instructions on setting up unit of measure conversions, see the *Application Exchange Framework Guide*.


To choose your preferred currency and/or unit of measure

1. Click **Tools>Preferences** from the global toolbar.
2. From the General category of the Preferences page, click **Conversions**.

The Preferences window lists the currencies and units of measure set up for your system.



3. Choose the **Currency** and/or **Unit of Measure** you want to convert data to. If you choose As Entered for the currency or unit of measure, you will see no change when you try to convert the data on a page.
4. Click **Apply** or **Done** to save your selection. Clicking Apply leaves the Preferences popup open so you can set other preferences. Clicking Done closes it.

When you click the  tool on a page, the page opens in a new window with the currency and unit of measure information converted to the formats you selected.

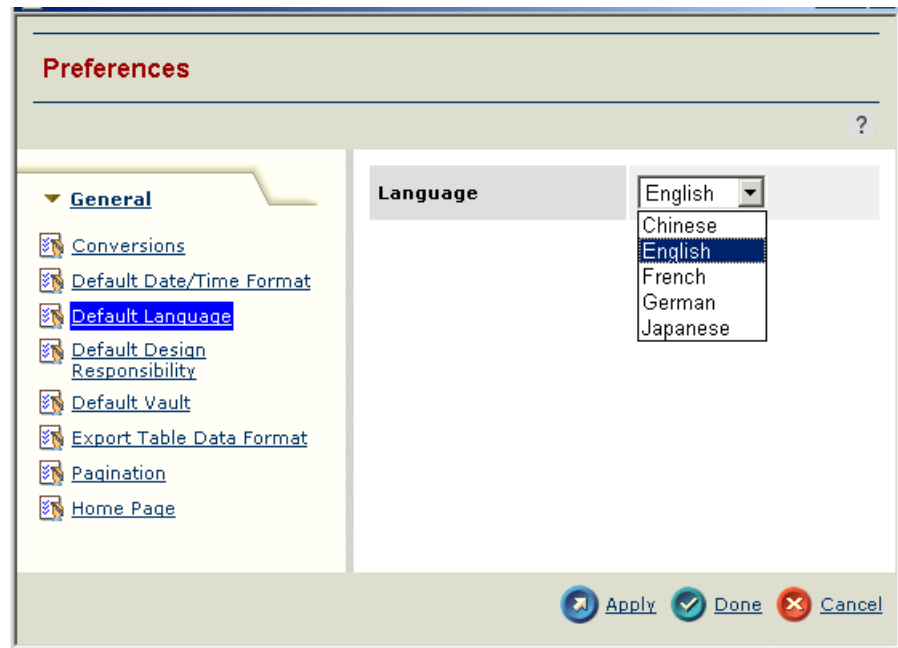
Choosing a Language for Notifications

You can specify the language you want to receive system-generated notifications, such as notifications that a task has been assigned to you or a route you created has been completed. (Mails created by individual users are not translated.) Depending on how your system is configured, if you do not choose a default language, the system notifications may contain messages translated in several languages or may be in just one language. In such a case, the notifications may not include the language you have your browser set to.

System notifications list only the recipients who have chosen the same language preference as the one you choose. The system may have sent the same notification to other recipients in different languages.

To choose the language in which you want to receive system notifications

1. Click **Tools>Preferences** from the global toolbar.
2. From the General category of the Preferences page, click **Default Language**.



3. Choose the **Language** you want.
4. Click **Apply** or **Done** to save your selection. Clicking Apply leaves the Preferences popup open so you can set other preferences. Clicking Done closes it.

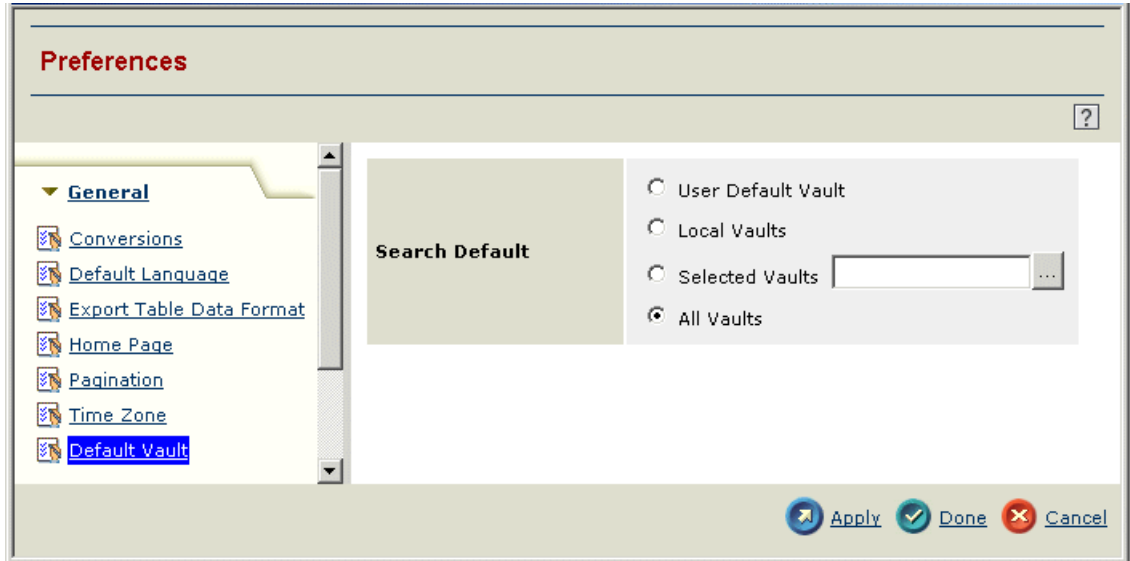
Choosing a Default Vault for Searching

You can choose the vault or vaults that are selected by default when you perform a search. For example, if you typically search in only the vault assigned to your person profile, you can choose that vault as your default vault for searching. Then when you execute searches, you only need to change the vault in those few cases where you want to search in a vault that is different from your default vault.

Searches in some applications don't use the default vault preference. For example, choosing a default vault for searching has no impact on searches performed in Sourcing Central or Team Central.

To choose the vault for searching

1. Click **Tools>Preferences** from the global toolbar.
2. From the General category of the Preferences page, click **Default Vault**.



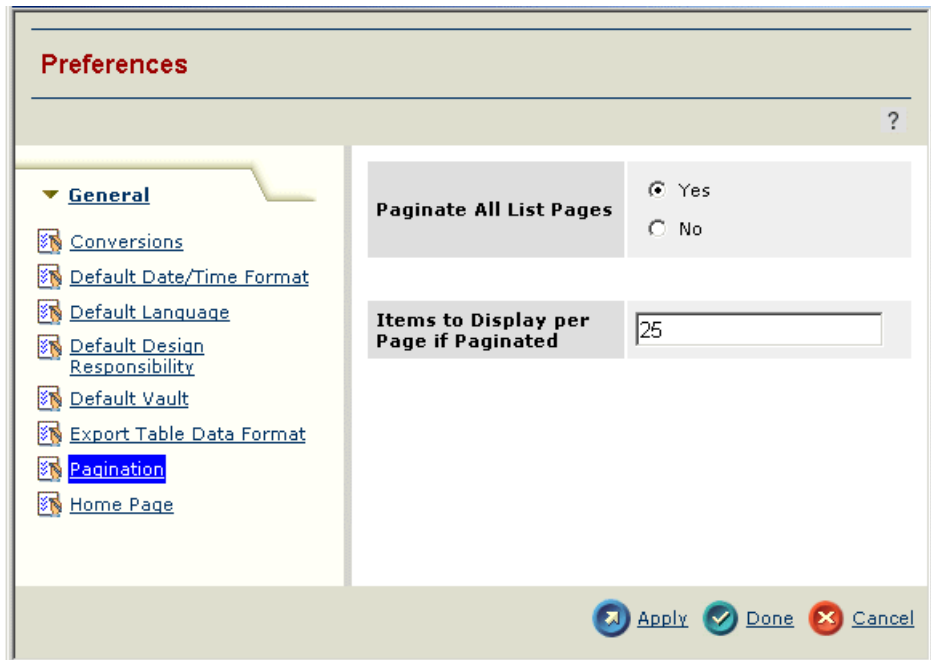
3. Choose the vault or vaults that you want chosen by default when you perform a search:
 - User Default Vault**—This is the vault specified in your person profile.
 - Local Vaults**—All local vaults that you have access to.
 - Selected Vaults**—Specific vaults assigned to your company. To specify vaults, click the Browse (...) button.
 - All Vaults**—All vaults for your company
4. Click **Apply** to save your selection and leave the Preferences popup open, or click **Done** to apply your selection and close the Preferences popup.
5. Click **Apply** or **Done** to save your selection. Clicking Apply leaves the Preferences popup open so you can set other preferences. Clicking Done closes it.

Choosing a Pagination Preference

The pagination preference allows you to specify the number of items to display per paginated page. You can also choose your initial on/off pagination setting. This setting is changed any time you change the setting on an individual page by using the paginate on/off button.

To choose pagination options

1. Click **Tools>Preferences** from the global toolbar.
2. From the General category of the Preferences page, click **Pagination**.



3. Choose **Yes** or **No** for the **Paginate All List Pages** option to set your initial pagination on or off. You can change this option here, or by clicking the paginate on/off button on any list page.
4. If you chose Yes for Paginate All List Pages, you can specify the number of **Items to Display per Page**. Any time pagination is set to on, this controls how many items you see on a single page.
5. Click **Apply** or **Done** to save your selection. Clicking Apply leaves the Preferences popup open so you can set other preferences. Clicking Done closes it.

Choosing a Time Zone Preference

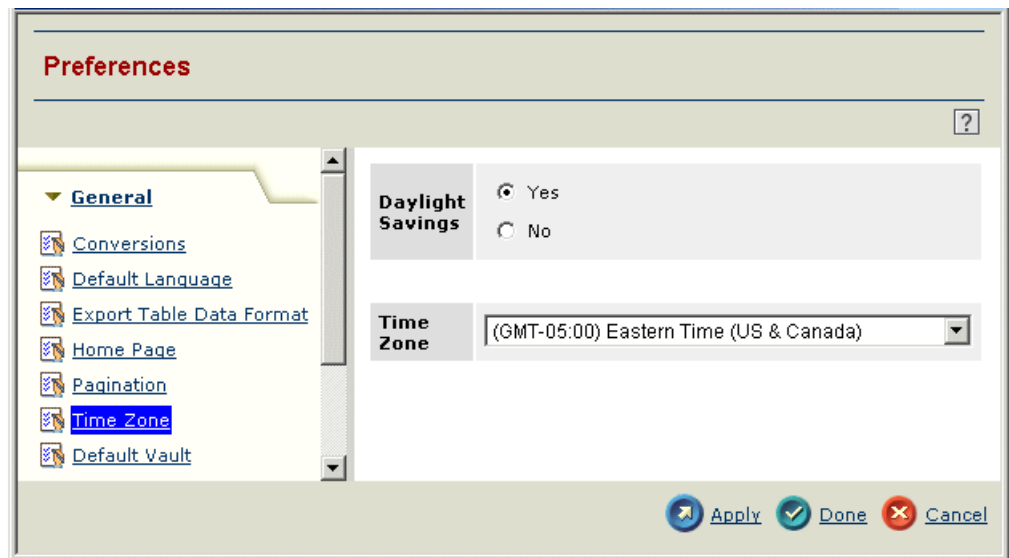
The time zone preference allows you to specify the time displayed for MatrixOne applications. Once it is set, all date/time entries, whether they are input or displayed by the system, are converted from the server time zone to the preferred time zone at the time of display. This allows clients in different locations around the world to see the time in their own time zone rather than the time where the server is located.

For example, if someone modifies a part in New York at 11 a.m., London users who have their time zone preference set to Greenwich Mean Time (GMT) will see the Modified time for the part as 4 p.m. Likewise, if someone in a Hong Kong time zone sets up a route and inputs the due date and time for task, the task owner in California will see the date and time converted to Pacific Standard Time.

The time zone preferences are shown according to geographical area and the plus or minus difference from Greenwich Mean Time (GMT). You can also choose a Daylight Savings option if the time zone you select supports it.

To choose your time zone

1. Click **Tools>Preferences** from the global toolbar.
2. From the General category of the Preferences page, click **Time Zone**.



3. Select a **Time Zone** from the drop-down list.
4. If the time zone you select supports Daylight Savings, choose **Yes** to have the system automatically change the time when Daylight Savings time changes for that zone.
Or
Choose **No** if you want your system to ignore Daylight Savings time changes. For example, certain areas within time zones that support Daylight Savings do not choose to switch between Daylight Savings and Standard Time.
This option is disabled for time zones that do not support Daylight Savings.
5. Click **Apply** or **Done** to save your selection. Clicking **Apply** leaves the Preferences popup open so you can set other preferences. Clicking **Done** closes it.

File Naming and Text Entry Guidelines

Naming Files

Documents that you add (check in) to the application can have long, descriptive names and names with spaces. Make sure file names do not include any of the following special characters: @ , * ? [] # \$ { } \ " < >

The Macintosh operating system (through OS 9.1) supports filenames up to, but not more than, 31 characters in length and uses colons as path separators.

Entering Text


When entering text information into MatrixOne application pages, keep in mind the following system behavior and conventions:

- Text fields are case-sensitive and spaces are allowed.
- Generally there is no limitation on the length of the data you can enter into fields.
- Leading and trailing spaces are ignored.
- The system accepts all special characters for descriptions and comments except the following: @ * ? [] # \$ { }

For instructions on configuring the system to accept special characters for names, descriptions, and comments, see the *Application Exchange Framework Guide*.

Printing a Page

To print the current page

1. Click  in the page toolbar. (If the page toolbar doesn't contain a Print tool, the page doesn't have a printable view.)
A printable view of the page opens in a new window.
2. Use the browser's **Print** button to print the page.

Controlling the Displayed Date/Time Format

The format in which the system displays dates depends primarily on your browser's language/region setting. For example, on a browser whose language is set to en-us, the dates will display as "Jan 12, 1952". If the browser is set to a European language/region, the dates display as "12 Jan 1952".

The system administrator for the host company can configure whether the date format includes the time and the length of the date/time (for example, Dec 12, 1952 vs. Tuesday, December 12 1952 AD 3:30:42 pm PST).

Using Application Documentation

Use online Help to answer questions you have while working in the MatrixOne applications. In addition to a shared help system for features included in all MatrixOne applications, each application contains its own Help system. Each Help system contains a PDF User Guide, which has the same information as the online Help, formatted for print.

The online Help system includes three parts:


- AEF Help—Includes features and functions dealing with the schema installed by the Application Exchange Framework:
 - Preferences
 - Global toolbar
 - Desktop PowerView page
 - Generic search features
- Common Components Help—Includes components that are shared by all MatrixOne applications:
 - Routes
 - Profile Management
 - Issue Management
 - Checkin/Checkout
 - Publish/Subscribe
 - Document Management
 - Folders
- Help for a particular application—Includes all features and functions that are particular to that application. For example, Engineering Central Help includes information on ECRs and ECOS.

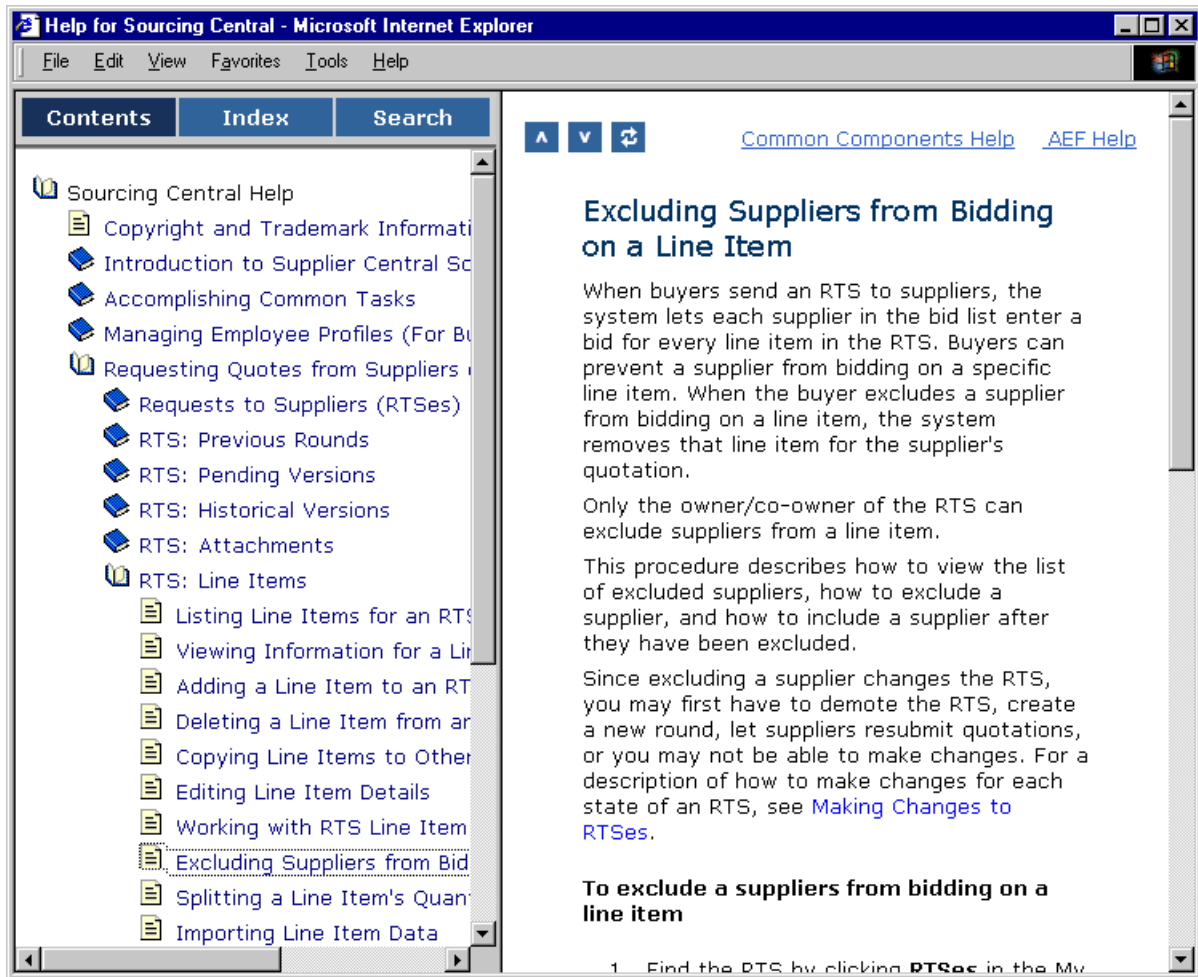
Use online Help to answer questions you have while working in the MatrixOne applications. In addition to a shared help system for features included in all MatrixOne applications, each application contains its own Help system.

For information about system requirements for the MatrixOne applications, see the Application Exchange Framework readme. For information about setting up, configuring, and customizing the applications, see the application's *Administrator Guide* and the *Application Exchange Framework Guide*.

Using Online Help

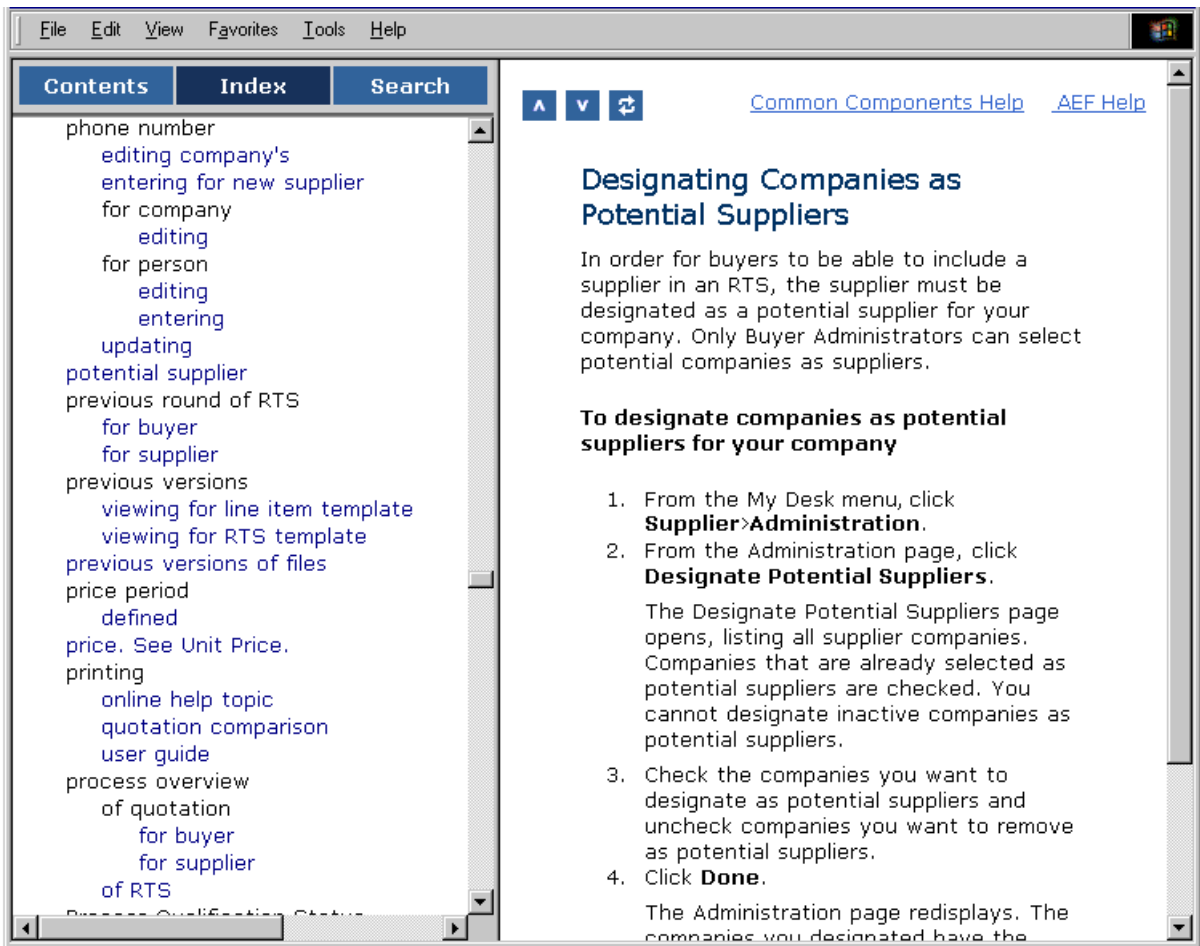
To get help on using the MatrixOne application

- Click  in the page toolbar of the page you are using. The Help system opens to the topic that explains the page. If the page is specific to the application you are working in, the Help for that application opens. If the page is general, the AEF Help or Common Components Help opens.



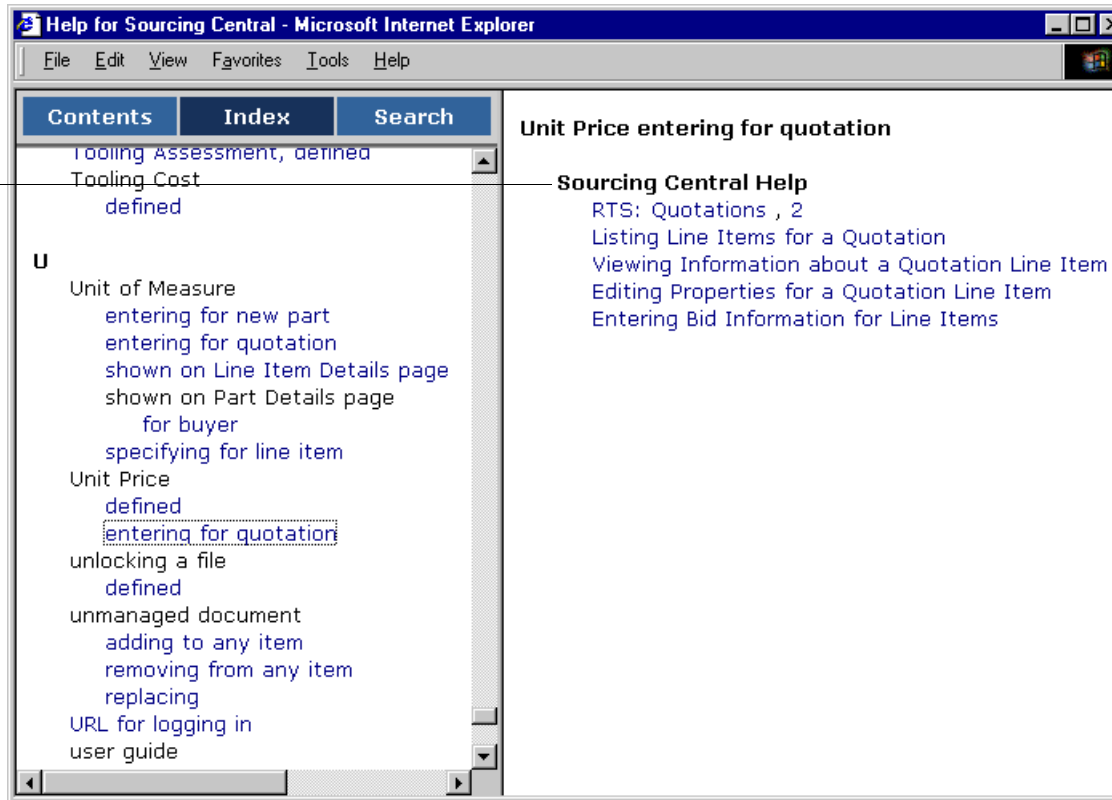
If you don't see the answer to your question, you can probably find it in another section of the help system using one of the navigation options:

- ***Browse through the Help system.***
Click the Next and Previous buttons, located at the top and bottom of every page, to advance sequentially through the help topics.
- ***Choose a topic from the Table of Contents.***
 - a) Click the **Contents** box on the left side of the help window.
This frame shows the table of contents for the Help system and corresponding user guide.
 - b) To expand the contents, click a closed book.
 - c) To collapse the contents, click an open book.
 - d) To go to a topic listed in the Contents frame, click the topic title.
- ***Choose a keyword from the index list.***
 - a) Click the **Index** box.
 - b) Scroll to the keyword you are looking for, then click the keyword.



- c) If more than one section of the guide discusses the keyword, the help system presents multiple links.

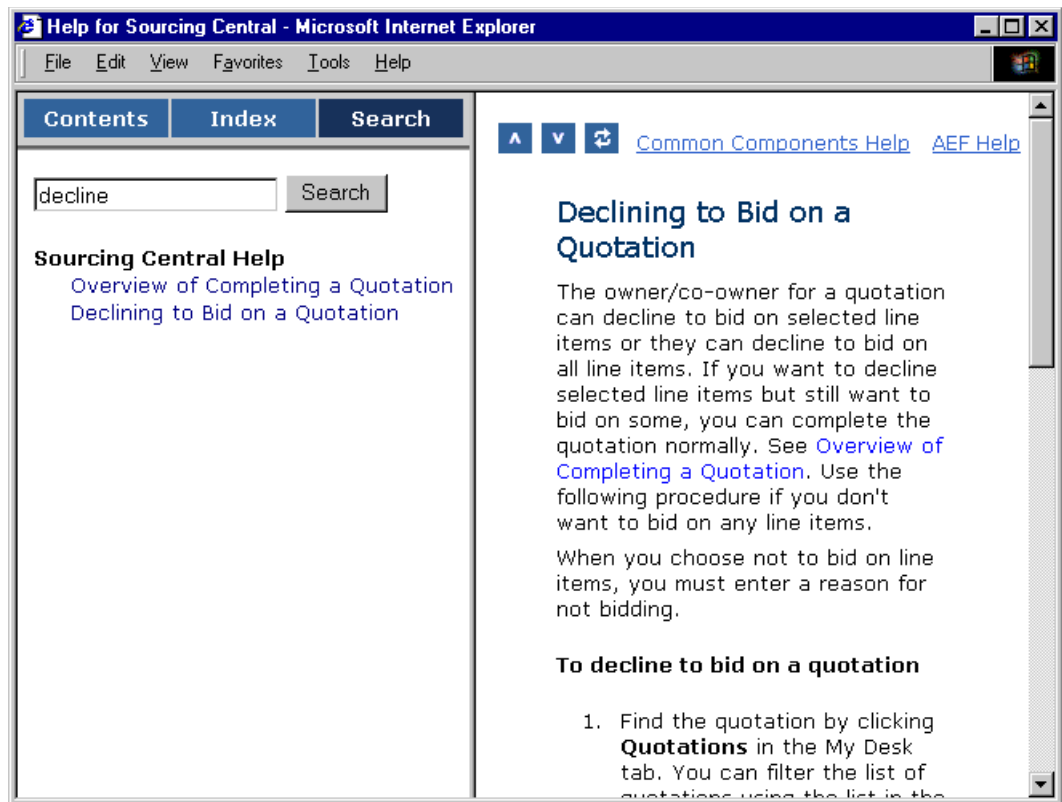
The keyword "Unit Price" is discussed in several topics. Click the blue links to see the topics.



- **Search for a word or phrase.**
 - a) Click the **Search** box.
 - b) Type the word or phrase that you want to search for. The search is not case sensitive.

The help system lists the topics that contain the word.
 - c) Click the topic name in the left frame.

The help system found the word "decline" in two topics within the help system.



- **Look in the Common Components or AEF Help.**

The top of each help page contains links to Common Components and AEF Help, which contain details about features that are shared by all MatrixOne applications. See the list at the beginning of [Using Application Documentation](#) for features that can be found in these books.

Printing a Help Topic

To print an online help topic

1. Go to the topic you want to print.
2. Right-click in the right frame.
3. In Internet Explorer, choose **Print**. From the Print dialog box, click **OK**.

Or

In Netscape, choose **Open Frame in New Window**. In the new browser window, click **Print**. From the Print dialog box, click **OK**.

Frequently Used Functions

Searching for Objects

The search function enables you to find objects in MatrixOne applications. The search results can be limited by including specific search criteria.

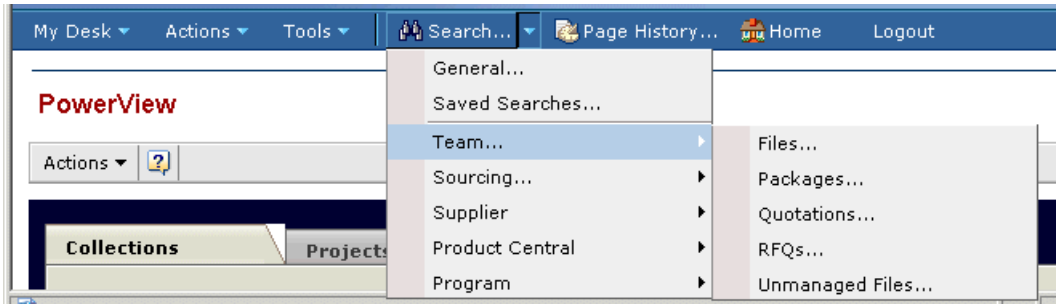
Search can be conducted either from the global toolbar or from specific locations within MatrixOne applications, such as when filling in a field within a form. For example, many Edit Details pages contain an Owner field with an ellipsis button which provides access to the Find Person page.

You access the main search function from the global toolbar. By default, the main search page is Saved Searches, but you may see a different main search page, depending on your installation setup and the roles you are assigned.

You can click Search from the global toolbar to go directly to the main search page or select the type of search you want to perform from the drop-down list. The Search Types menu on the main search page contains the same options as the drop-down list, with additional save options. By default, the drop-down list contains search options for all installed MatrixOne applications and search options that are shared across applications. Since this is configurable, you may see different options than those described here.

The search results you receive are dependent on the roles you are assigned and your access privileges for different types of objects. For example, suppose you are searching for parts. If design responsibility is assigned for a particular part, that part will be shown only to the

part owner and to users who have read/show access and are members of the organization that has design responsibility for the part.



The following sections explain the search processes:

[Using General Search](#)

[Using Advanced Search](#)

[Saving Search Criteria](#)

[Working with Saved Searches](#)

[Selecting a Type](#)

[Selecting a Vault](#)

[Finding and Selecting People](#)


[Using Search and Select](#)

Using General Search


When a user who has the Administration Manager role clicks Search from the global toolbar, the General Search page opens. Also, for Administration Managers only, General Search is the first option in the drop-down list from either the global toolbar Search or from the Search Types menu on the Search page. By default, no other roles have access to General Search.

One exception is if Engineering Central is installed. There is a General Search page under the Engineering Central search.

To search for objects

1. From the global toolbar, click **Search**.
The General Search page opens.
2. If you click the Search Types menu from the page toolbar and select a Type, the page redisplay to include attributes specific to that type. Click  from the help page to get context-sensitive help for the selected type.

Or

Click  to select the **Type** or subtype. See [Selecting a Type](#) for details. If you choose this method, only the standard basic/advanced attributes are shown.

The screenshot shows a search interface with the following elements:

- Search Types:** A dropdown menu with a question mark icon.
- Type:** A text box containing "Part" and a "Clear" button.
- Name:** A text box containing an asterisk (*).
- Revision:** A text box containing an asterisk (*), a checkbox for "Latest Revision Only", and a "Clear" button.
- Vault:** A dropdown menu with "All" selected.
- More:** A link with a right-pointing arrow.
- Limit to:** A text box containing "100" and the text "results".
- Paginate results:** A checkbox.
- Search/Cancel:** Two buttons, "Search" (with a magnifying glass icon) and "Cancel" (with an 'X' icon).

3. Enter basic search criteria. By default, all fields are case-sensitive, unless your Oracle database has been configured for case insensitivity. Matrix/Db2 environments are always case-sensitive.

Name. To search for a specific object or group of objects, type a Name. Names can include wildcard characters, for example, 001* or *-Version 8. The default is *, which includes all names.

Revision. To search for a specific revision, type the revision number or sequence. Revisions can include wildcards, for example, 5-*. The default is *, which includes all revisions. You can also check the box to limit the search to **Latest Revision Only**.

Vault. You can choose any of the following vault options:

- All—all primary and secondary vaults to which you have access, including your company's vaults and those of companies defined as collaboration partners, including both local and remote vaults.
- Local Vaults—primary and secondary vaults for your company to which you have access that are local to the connected server.
- other vaults—Other vault names could be included, depending on your system setup. This generally includes the default vault you selected in Preferences.

4. You can optionally specify result options:
 - a) Use the **Limit to** text box to specify how many items should be shown in the search results. For example, if you limit the results to 50, the system will get only the first 50 items from the database that match your criteria. The maximum is by default 1000, but may vary depending on your installation setup.
 - b) Click **Paginate results** to show the results with a limited number of items per page, based on your defined pagination preference.
5. If you intend to use the same search criteria again, you can save it by clicking Save or Save As from the page Search Types menu. For details, see [Saving Search Criteria](#).
6. If you want to enter additional search criteria, click **More**. For details, see [Using Advanced Search](#).
7. When you have finished entering search criteria, click **Search**.

The Search Results page appears, showing a table that lists summary information for all items that match your search criteria. The contents of Search Results pages vary, depending on what types of objects you are searching for. You can use the pagination controls to navigate to other pages. For details, see *Navigating Within a Table* in Chapter 1.

<input type="checkbox"/>	<input type="checkbox"/>	Name	Revision	Type	Description	State	Part Origin	Equivalent	Manufacturer
<input type="checkbox"/>	<input type="checkbox"/>	CM-200000-01	2	Part	Copy Machine	Approved	Enterprise		
<input type="checkbox"/>	<input type="checkbox"/>	CM-200000-01	3	Part	Copy Machine	Approved	Enterprise		
<input type="checkbox"/>	<input type="checkbox"/>	CM-200000-01	1	Part	Copy Machine	Approved	Enterprise		
<input type="checkbox"/>	<input type="checkbox"/>	MEP-1123-04	3	Part	Copy Machine	Preliminary	Manufacturer Equivalent	PT-1123-04 PT-1124-04 PT-1125-04	Motorola IBM Philips

Use the check boxes in the first column to select items to delete or to add to a collection.

8. Work within the search results page:
 - If the search results do not contain the item you want, click **Revise Search** from the page toolbar to change some or all of the previously-specified search criteria.
 - To add items to a new or existing collection, check the items and click **Add to Collection** from the page toolbar. See *Adding Items to a Collection*.
 - To delete items from the database, check the items and click **Delete** from the page toolbar. You must have delete access to perform this task.

Using Advanced Search

You can use the advanced search function from the main Search page to further limit the number of items returned as a result of the search. The advanced search lets you search by any attribute of the type of item you are searching for (not including hidden attributes). You can include details about as many attributes as you want. If you do not want to use a specific attribute, leave its value as *. By default, all fields are case-sensitive, unless your Oracle database has been configured for case insensitivity. Matrix/Db2 environments are always case-sensitive.

To use advanced search

1. From the global toolbar, click **Search** or select a search option from the Search menu. For details, see *Searching for Objects*.

The Search page opens.

2. Click next to the **Type** field at the top of the page to select the type of object you want returned in the search results. See *Selecting a Type* for details.

3. Click **More**.

The search criteria for the type of search you selected appears.

Search: General

Actions Search Types ?

Type Part Clear

Name *

Revision * Latest Revision Only

Vault All

More

By Additional Attributes with And Or

Field	Operator	Enter Value	Select Value
Owner	Begins With	W	
Description	Includes	component	
Current	Is Exactly	*	Approved
Originated	Is On Or After	Dec 1, 2003	
Modified			

Limit to 100 results Paginate results Search Cancel

4. At the top of the advanced search section, select whether you want to use an “Or” search or an “And” search.

Or—Search results contain items that include *any* attributes specified.

And—Search results contain items that include *all* attributes specified.

For example, suppose you search for parts and specify the following attributes:

- Modified greater than Dec. 1, 2003
- Target Cost less than \$1000

If you select “And,” the search results contain only those parts that have been modified since Dec. 1, 2003 and have a Target Cost less than \$1000.

If you select “Or,” the search results will show all parts that have been modified since Dec.1, 2003, regardless of what their Target Cost is. It will also include all parts that have a Target Cost less than \$1000, regardless of when they were last modified. “Or” searches often produce a larger number of results than “And” searches.

5. For each attribute that you want to include in the search criteria, choose an operator and enter the data you want to search on:

a) Choose an **Operator**. The operators for text attributes are:

Begins with—The system looks for attributes whose data begins with the text you enter (like including a wildcard * at the end of the text you enter).

Ends with—The system looks for attributes whose data ends with the text you enter (like including a wildcard * at the beginning of the text you enter).

Includes—The system looks for attributes whose data includes the text you enter (like including a wildcard * before and after the text you enter).

Is exactly—The system looks for attributes with data that exactly matches the text you enter (like not including a wildcard in the text you enter).

Is not—The system looks for attributes that do not contain the text you enter.

Matches—The system looks for attributes with data that matches text you enter.

The operators for numeric attributes are Is at most, Is at least, Does not equal, Equals, Is between, Is less than, Is more than.

The operators for date/time attributes are Is on, Is on or before, Is on or after.

b) Enter the data you want to search on in the **Enter Value** column.

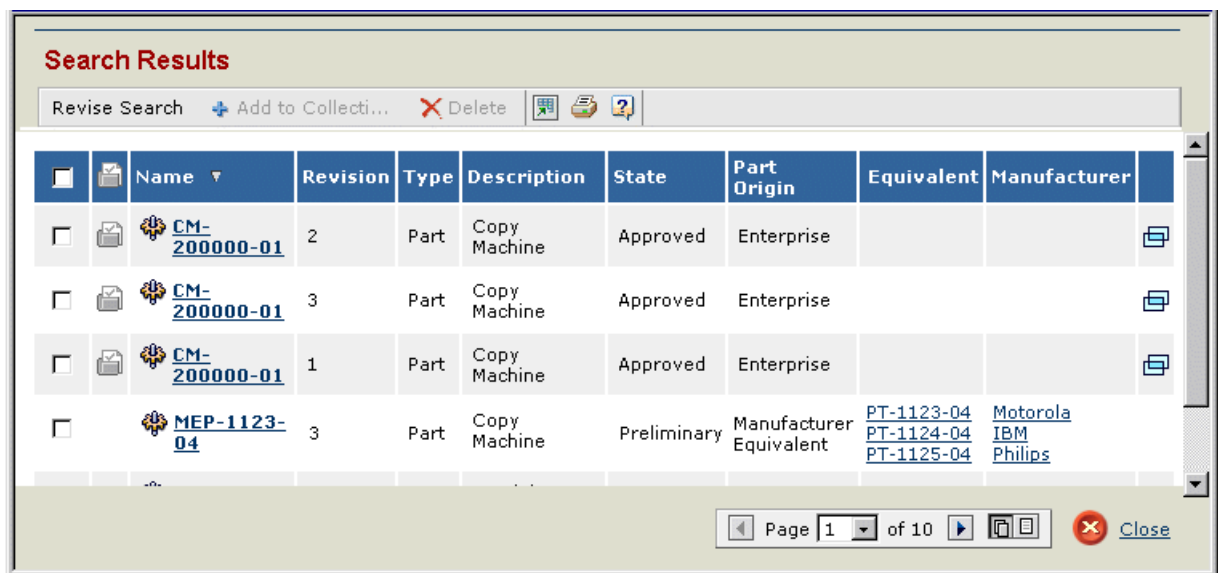
If range values have been predefined for the attribute, a drop-down list is provided in the **Select Value** column.

For date attributes, click the calendar icon to select a date. See [Entering Dates Using the Calendar](#) for details.

If you are using Is Between for numeric values, include both values in the Enter Value field, separated by spaces.

6. When you have entered your search criteria, click **Search**.

The Search Results page appears, listing summary information for all items that match your search criteria. You can use the pagination controls to navigate to other pages. For details, see [Navigating Within a Table](#) in Chapter 1.



Use the check boxes in the first column to select items to delete or to add to a collection.

7. Work within the search results page:

- If the search results do not contain the item you want, click **Revise Search** from the page toolbar to change some or all of the previously-specified search criteria.
- To add items to a new or existing collection, check the items and click **Add Selected to** from the page toolbar. See [Adding Items to a Collection](#).
- To delete items from the database, check the items and click **Delete** from the page toolbar. You must have delete access to perform this task.

Saving Search Criteria

After you finish defining search criteria, you can save it for later use. For example, you may need to check the status of a particular set of parts on a weekly basis. Once you have defined the search criteria for those parts, you can save the search to use again.

To save a search

1. From the global toolbar, click **Search**.

The Search page opens. Define search criteria. For details, see [Using General Search](#) or [Using Advanced Search](#).

2. Click **Actions>Save** from the page toolbar.

The Save Search popup opens.

a) Provide a descriptive **Name** that will appear in the Saved Searches list, for example, “Software parts modified after Dec. 1.”

b) Click **Done**.

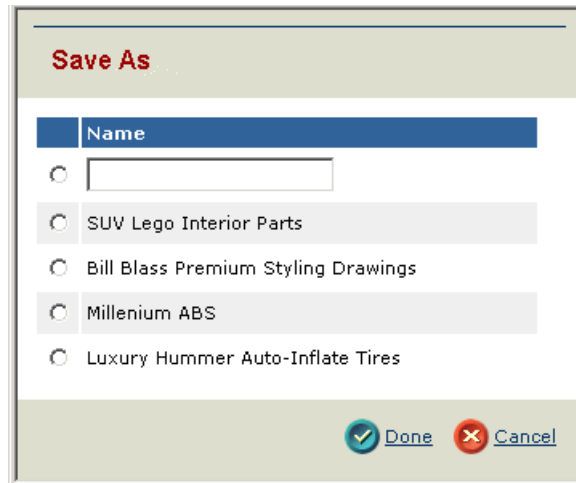
If you make changes to your search criteria and click Save again, changes are saved to the current saved search without prompting for a name.

The next time you want to perform a search using the same search criteria, you can use the search that you saved. See [Working with Saved Searches](#) for details.

Alternatively, the Save As feature can be used to rename or overwrite a previously-saved search.

1. After you have defined search criteria, click **Actions>Save As** from the page toolbar.

The Save As popup opens.



2. To use a previously-saved search name, click the button next to the search name and click **Done**. This overwrites the information in the saved search, saving the new search criteria using the old name.
3. You can also type a new name in the text box and click **Done** to save the search using the new name.

Working with Saved Searches

If you performed a search and saved the search criteria, you can use the Saved Searches option to recall the search criteria so you don't have to type it again. For details, see [Saving Search Criteria](#).

To use saved searches

From the global toolbar, click **Search**. By default, for all users other than those with the Administration Manager role, the Saved Searches page opens.

Or

If this is not the default for your installation, click **Search>Saved Searches**. This command is also found on the Search Types menu on the Search page.

The Saved Searches page opens.



The page shows a table of saved searches with following columns:

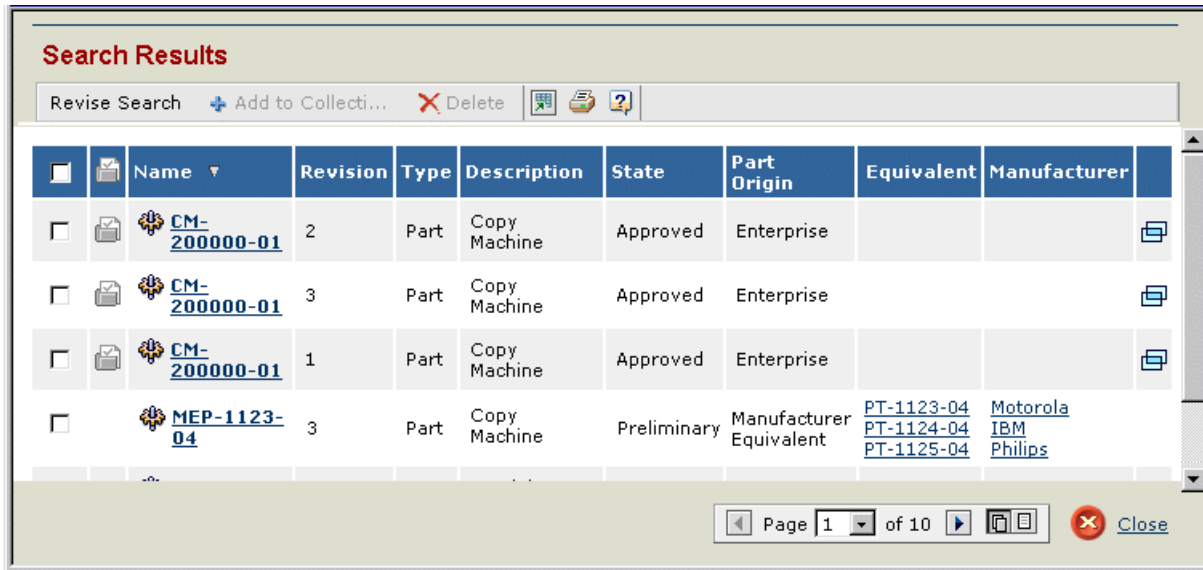
Name—Click any name to run the search, or click the button in front of the search name and click **Search**.

Edit—Click to edit the search criteria for the saved search. A search page opens, appropriate to the content of the saved search. For example, if the saved search contains only basic data, the general search page opens. See [Using General Search](#). If the saved search contains additional attribute data, the Advanced search page opens. See [Using Advanced Search](#).

Delete—Click to delete the saved search from the database.

4. You can optionally specify result options:
 - a) Use the **Limit to** text box to specify how many items should be shown in the search results. For example, if you limit the results to 50, the system will get only the first 50 items from the database that match your criteria. The maximum is by default 1000, but may vary depending on your installation setup.
 - b) Click **Paginate results** to show the results with a limited number of items per page, based on your defined pagination preference.

When you click the name of the saved search, the Search Results page appears, listing summary information for all items that match your search criteria. For details, see [Using General Search](#).



Use the check boxes in the first column to select items to delete or to add to a collection.


5. Work within the search results page:

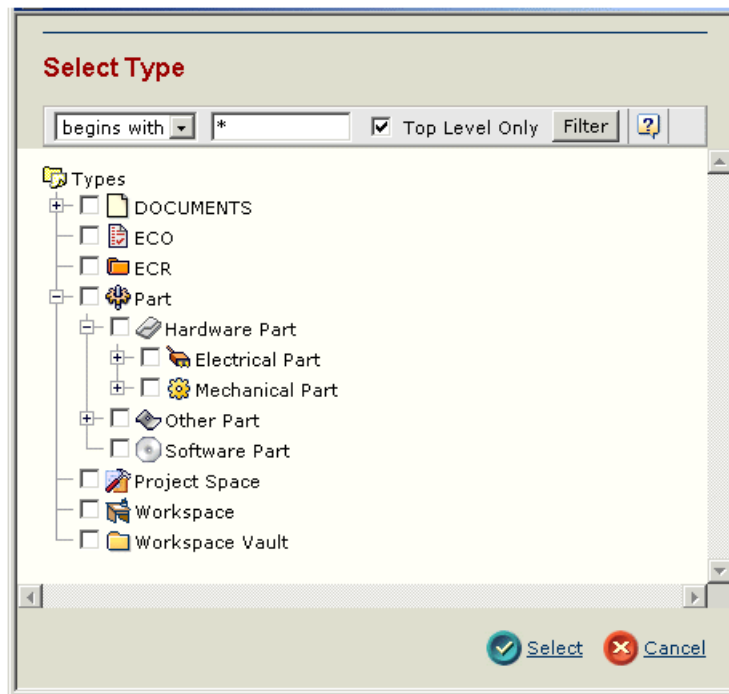
- If the search results do not contain the item you want, click **Revise Search** from the page toolbar to change some or all of the previously-specified search criteria.
- To add items to a new or existing collection, check the items and click **Add to Collection**. See *Adding Items to a Collection*.
- To delete items from the database, check the items and click **Delete** from the page toolbar. You must have delete access to perform this task.

Selecting a Type

Many pages within the MatrixOne applications require that you select a type. This occurs, for example, in search functions and in some create functions, where you can create a subtype.

To select a type or subtype

1. Click  next to a Type field on a form page. The Select Type pop-up window appears.



Only the types pertinent to the selection you need are shown. For example, if you are selecting a type of specification, the only choices shown are CAD Model, CAD Drawing and Drawing Print.

2. The type list may or may not show all types accessible for your role, depending on your installation setup. You can limit the number of types shown or find additional types by using the filter bar.
 - a) Select an operator:
 - begins with—The system looks for type names that begin with the text you enter (like including a wildcard * at the end of the text you enter).
 - ends with—The system looks for type names that end with the text you enter (like including a wildcard * at the beginning of the text you enter).
 - contains—The system looks for type names that include the text you enter (like including a wildcard * before and after the text you enter).
 - equals—The system looks for type names that exactly match the text you enter.
 - b) Type the text to search on. This field is case-sensitive.
 - c) Check **Top Level Only** if you want to see only parent types, or uncheck it to see all type and subtypes that match your filter criteria.
 - d) Click **Filter**.

For example, to search for all parts, select “contains” from the drop-down list, type “Part” in the text field, and uncheck “Top Level Only.” The list will change to show all types that contain the word “Part”, for example: Part, Electrical Part, Mechanical Part, Component Part, etc.
3. A plus sign to the left of a type indicates that there are subtypes of that type. Click the plus sign to expand the type hierarchy. Click the minus sign to collapse the hierarchy.

4. Click the check boxes of the types you want to include. If you are allowed to choose only one type, you will see buttons rather than check boxes.
5. Click **Select**.


The Select Type window closes automatically and display returns to the page where you initiated the search. If you selected multiple types, all are included in the text box, separated by commas.

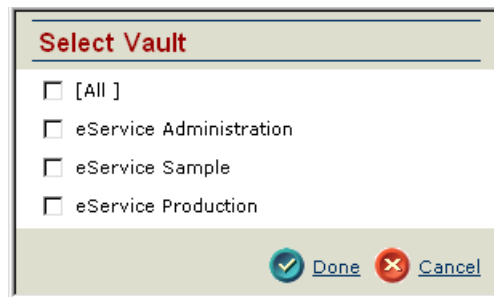
Selecting a Vault

Vault selection is available from many pages in MatrixOne applications. For example, if you are adding an existing object to a list, you can choose which vault(s) to search. You can also select the vault where newly created objects are stored. When creating objects, a collaboration partner's vault will only show in the vault list if the object type that is being created is one of the object types that are shared.

For performance reasons, the default search vault is initially set to your company vault, but you can change this default. See [Choosing Preferences](#) in Chapter 1 for details.

To select a vault

1. Click  next to a Vault field on a form page. The Select Vault page opens.




2. If you are allowed to select more than one vault, the vaults are shown with check boxes next to the vault names.
If you are allowed to select only one vault, the vaults are shown with buttons next to the vault names. For example, if you are defining a person, you can specify the default vault the person will use to access database objects. Click one button to select the vault.
3. Click **Done**. The pop-up window closes automatically and the name of the vault is shown in the text box.

Finding and Selecting People

Many pages within the MatrixOne applications require that you select a user. You may be required to select a user from the type chooser, as when reassigning ownership of an object or assigning a designated user for an object. Other pages allow you to search for people, groups, or roles using the page Actions menu, as when assigning members to a route.

To find and select people

1. Click  next to the field on a form page that requires that you select a user.
Or
Click **Add People**, **Add Group**, or **Add Role** from the page Actions menu.

The Search page appears.

2. Depending on where you access search from, you may be presented with a choice to select one of the following from the left side of the Search page: Find Group, Find Role, Find Person, Find Person.
3. Specify search criteria to limit the number of items included in the search results, or leave the defaults of * to search for all of the type of user selected.

The screenshot shows a 'Search People' dialog box. At the top, there is a title 'Search People' and a search input field with a help icon. Below this, there are five search criteria: 'Type', 'User Name', 'First Name', 'Last Name', and 'Organization'. Each criterion has a text input field with an asterisk (*) indicating a wildcard. The 'Type' field has a dropdown arrow. At the bottom right, there are 'Search' and 'Cancel' buttons.

The Search People search criteria includes some or all of the following fields, depending on where you accessed search from:


User Name. If you know the person's User Name as it is defined in the system, type the name or part of a name (using wildcards).

First Name. Type the person's first name or part of a name (using wildcards).

Last Name. Type the person's last name or part of a name (using wildcards).

Organization. Type an Organization name or part of a name (using wildcards). This can be a company, subsidiary, business unit, or department. The search results will include employees of the organization, but not persons who only have role access to the organization.

Vault. You can choose any of the following vault options:

- All—Searches all vaults to which you have access, including local and remote vaults.
- Local—Searches only the local vault.
- Default—Searches only the vault defined as your default vault in your person definition.
- Selected—If multiple vaults are available, you can click  to limit the search to specific vault(s). See [Selecting a Vault](#) for details.

The Search Roles and Search Groups search criteria include the following:

Name. Type the group or role name or part of a name (using wildcards).

Level. Select Top Level, Sublevels, or both. (This option is not included when selecting a Release Distribution Group. Instead, the Parent is set to Distribution Groups.)

4. When you have entered your search criteria, click **Search**.

The Search Results page appears, listing the names of all users that match your search criteria. You may also see additional information such as Login Name and Company, depending on where you accessed search from.

<input type="checkbox"/>	Name	Login Name	Company Name
<input type="checkbox"/>	Acceptance Project Lead	apl	PMC Acceptance
<input type="checkbox"/>	Author	dmc author	Company Name
<input type="checkbox"/>	Comp1 Administrator	dmc comp1 admin	DMC Comp1
<input type="checkbox"/>	Comp1 Reviewer	dmc comp1 reviewer	DMC Comp1

5. Click the button to the left of the person, group, or role you want to select.
If selection of multiple people, groups, or roles is allowed, the search results page shows check boxes instead of buttons.
6. Click **Done**.


Using Search and Select

Two different kinds of searches within MatrixOne applications require you to provide search criteria and then select one or more items from the search results.

- On many pages within MatrixOne applications, an ellipsis button is included when you need to search for an object. For example, when you are connecting new parts to an ECO, or selecting a new product line to apply an ECR.
- When you are viewing a list of objects, the Add Existing link is available to add objects that currently exist in the database to the list. For example, the link is available when you are viewing a list of part revisions or specifications.

In either case, the Search page allows you to specify search criteria to find the item you want, and the search results page allows you to select objects. You may be allowed to select just one item, or you may have the option of selecting multiple items.

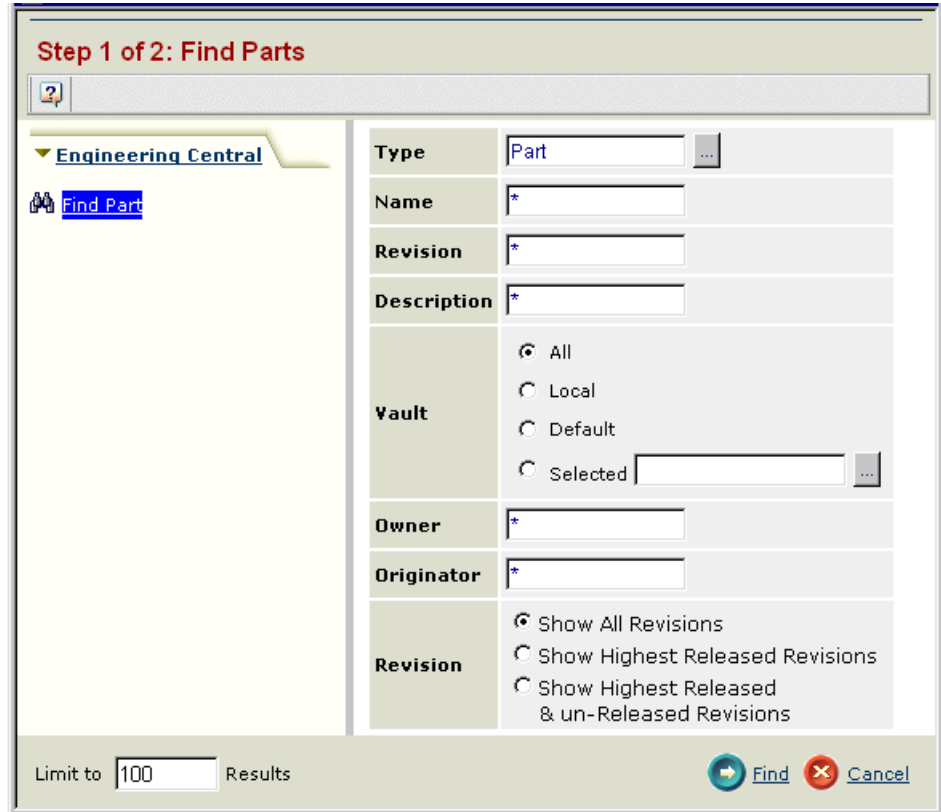
To use search and select

1. Click  next to the field in the page where you need to search for objects.

Or

If you are adding an existing object to the a list of objects, click **Add Existing** from the page Actions menu.

The Search page opens, showing selections appropriate to the action you want to perform. For example, the following is the Search page when you want to find a part.



Step 1 of 2: Find Parts

Engineering Central


Find Part

Type	Part
Name	*
Revision	*
Description	*
Vault	<input checked="" type="radio"/> All <input type="radio"/> Local <input type="radio"/> Default <input type="radio"/> Selected
Owner	*
Originator	*
Revision	<input checked="" type="radio"/> Show All Revisions <input type="radio"/> Show Highest Released Revisions <input type="radio"/> Show Highest Released & un-Released Revisions

Limit to 100 Results

Find Cancel

2. Enter basic search criteria. In general, all searches contain the same basic information. In certain cases, some of the attributes listed below are not available.

Type. Click  to select the type or subtype. See [Selecting a Type](#).

Name. To search for a specific object or group of objects, you can provide a name. Names can include wildcard characters, for example, 001* or *-Version 8. The default is *, which includes all names.

Revision. To search for a specific revision, type the revision number or sequence. Revisions can include wildcards, for example, 5-*. The default is *, which includes all revisions.


Description. To search for objects that contain a specific word or phrase in the description, type the word or phrase using wildcards. For example, if you are searching for parts whose description contains the word *machine*, you would type **machine** in the text box. This search is not case-sensitive.

Owner. Type a user name or part of a name (using wildcards) if you want to limit the search to objects owned by a particular person. An engineer might use this to find all objects that s/he is assigned.

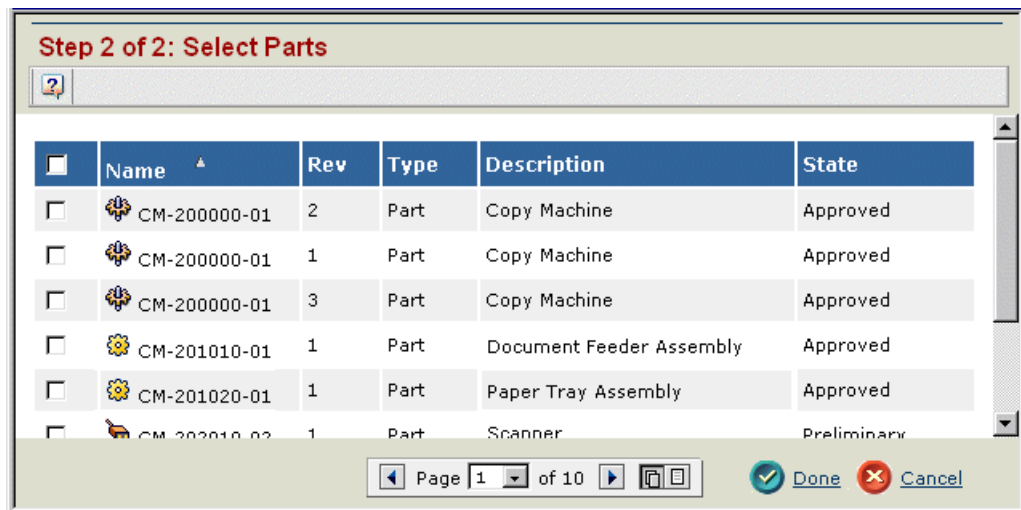
Originator. Type a user name or part of a name (using wildcards) from the list if you want to limit the search to objects created by a particular person.

Select a **Revision** option: Show All Revisions, Show Highest Released Revisions, Show Highest Released and un-Released Revisions.

Vault. You can choose any of the following vault options:

- All—Searches all vaults to which you have access, including local and remote vaults.
 - Local—Searches only the local vault.
 - Default —Searches only the vault defined as your default vault in your person definition.
 - Selected—If multiple vaults are available, you can click  to limit the search to specific vault(s). See [Selecting a Vault](#) for details.
3. Use the **Limit to** text box to specify how many items should be shown in the search results. For example, if you limit the results to 50, the system will get only the first 50 items from the database that match your criteria. The maximum is by default 1000, but may vary depending on your installation setup.
 4. When you have entered your search criteria, click **Search**.

The Select page appears, listing summary information for all items that match your search criteria. You can use the pagination controls to navigate to other pages. See [Navigating Within a Table](#) in Chapter 1 for details.



5. Check the item(s) you want to include. If you are allowed to choose only one item, you will see buttons rather than check boxes.
6. Click **Done**.

Collections

MatrixOne application users typically access the same items in various areas within the applications. You can save particular items into a *collection* where it is easier to access them, instead of having to search repeatedly for them. Collections can include any type of object. For example, a collection could be created to group parts and documents related to a particular project.

All registered users in any role can save objects into collections and maintain collections for their own use. Each person has his or her own collections that no other person has access to.

- [Creating a Collection](#)
- [Adding Items to a Collection](#)
- [Listing Your Collections](#)
- [Managing a Collection](#)
- [Deleting a Collection](#)


Creating a Collection

There are two methods to create collections:

- You can search for objects and add them to a new collection. See [Adding Items to a Collection](#).
- You can create empty collections as a storage place. For example, if you have three projects planned and you want to create collections where items relating to those projects will be stored, you can create the collections objects first and add items as they become available.

To create a new collection

1. From the global toolbar, click **My Desk>Collections**. This lists all collections you have previously created.
2. Click **Create New** from the page Actions menu.



The screenshot shows a dialog box titled "Create New Collection". At the top left, there is a search icon in a box. Below this is a red note: "Fields in red italics are required". The dialog contains two input fields: "Name" (with "Name" in red italics) and "Description" (with "Description" in bold). At the bottom right, there are "Done" and "Cancel" buttons.

3. Type a Name and Description for the collection. Collection names must be unique.

4. Click **Done**.

The collection is created as an object in the database, even though it has no content. To add items to the collection, see [Adding Items to a Collection](#) and [Managing a Collection](#).

Adding Items to a Collection

You can search for and select items to add to a new or existing collection. For example, you can search for parts, then select particular parts from the search results to add to a collection. If the collection name you specify does not exist, a new collection is created. If the collection exists, the selected items are added to those already included.

You can also add items to an existing collection from that collection's Items page.

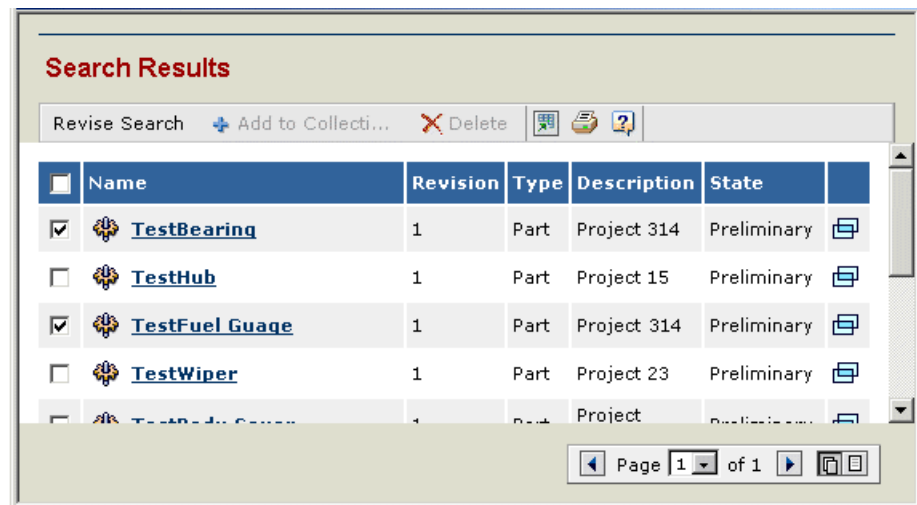
Collections can include any type of object. For example, a collection could be created to group similar parts or to group documents related to a particular project.

To add items to a collection

1. From the global toolbar, click **Search**.

Enter search criteria to find the objects you want to add to a collection. For details, see [Using General Search](#).

2. From the Search Results page, check each item that you want to include in the collection.



3. Click **Add to Collection** from the page toolbar.

The Select Collection popup appears, showing all collections that you own.



- If you want to add the objects to an existing collection, select that collection.

Or

If you want to create a new collection to add the objects to, type a name. Don't use the same name as one of your existing collections. If you choose a name that matches an existing collection that you own, an error message displays and the Select Collection popup redisplay so you can enter a different name.

- Click **Done**.

If a selected object already exists in the collection, it is not added again.

To add items to a collection you are viewing

- View the contents of a collection. For details, see [Managing a Collection](#).
- From the Collection Items page Actions menu, click **Add Existing**.
Enter search criteria to find the objects you want to add to a collection. For details, see [Using General Search](#).
- From the Search Results page, check each item that you want to include in the collection.
- Click **Add to Collection** from the page toolbar.
The items are added to the collection.

Listing Your Collections


The Collections page lists the collections that you have saved, including collection names, descriptions, and the number of items (Count) included in each collection. This page provides access to specific collections, and links to create new collections or delete existing collections from the database.

To list your collections

- From the global toolbar, click **My Desk>Collections**.
The Collections page opens, listing the collections you have saved.

Collections

Actions ▾   

<input type="checkbox"/>	Name	Description	Count	
<input type="checkbox"/>	Parts and ECRs for Alpha Project		20	
<input type="checkbox"/>	Documents		10	
<input type="checkbox"/>	Parts 2000	parts 2000-2999	8	
<input type="checkbox"/>	Parts 3000	parts 3000-3999	11	

Page 1 of 1  

For each collection, the page lists:

Name—Click on any highlighted link in the Name column to view the contents of the collection. See [Managing a Collection](#) for details.

Description—Details about the collection, specified when it was created or modified.

Count—The number of items included in the collection.

- To create a new collection, click **Create New** from the page Actions menu. See [Creating a Collection](#).
- To delete a collection from the database, check it and click **Delete** from the page Actions menu. See [Deleting a Collection](#).










Managing a Collection



You can view the content of any collection that you create, including basic details about the items contained in the collection. From the category list and Properties page for the collection, you can rename the collection, modify the description, and add and remove items.

To view the contents of a collection

- From the global toolbar, click **My Desk>Collections**.
- From the Collections page, click the name of the collection.

The category list for the collection opens with the Items category selected. The Items page lists all items in the collection.

Collection1: Items						
Actions ▾  						
<input type="checkbox"/>	Name	Rev ▾	Type	Description	State	
<input type="checkbox"/>	 PT-1123-04	1	Part	Lian PC-60 aluminum case for high performance PCs.	Preliminary	
<input type="checkbox"/>	 PT-1124-03	1	Part	Red Hat Linux 7.2 to replace the Seawolf version.	Release	
<input type="checkbox"/>	 PT-1125-08	2	Part	P2-6 case	Preliminary	

Page 1 of 10  

The Items page contains the following information for each item. It may contain other columns depending how the collection was created.

Name—Click the Name to see details about the item.

State—The current state of the item in its lifecycle.

Rev—Item revision number or code.

Type—The type or subtype of the item.

Description—Brief description of the item.

3. To remove items from the collection, check the item and click **Remove Selected** from the page Actions menu.

The object is removed from the collection, but remains in the database.

4. To add existing items in the database to the collections, click **Add Existing** from the page Actions menu.

The Search page appears, where you can define criteria to search for items that currently exist in the database. For details, see [Adding Items to a Collection](#).

5. To rename a collection or modify the description:

- a) From the top of the collection's category list, click the name of the collection.
- b) From the Properties page Actions menu, click **Edit Details**.
- c) Type a new name for the collection or modify the description.
- d) Click **Done**.

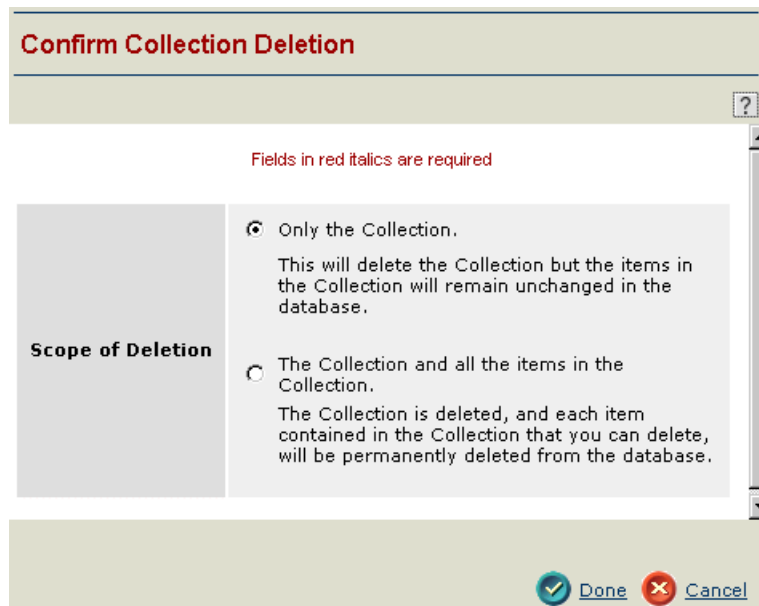
Deleting a Collection

You can delete any collection that you created. You can choose to delete only the collection or the collection plus the items in the collection. If you choose the latter, only the items that you have delete access to are deleted.

To view the contents of a collection

1. From the global toolbar, click **My Desk>Collections**.
2. From the Collections page, check the collection you want to delete.
3. Click **Delete Selected** from the page Actions menu.

The Confirm Collection Delete page opens, giving you the option of deleting only the collection or also the items in the collection.




4. To delete only the collection without affecting the items in the collection, choose **Only the Collection**.
To delete the collection and all items in the collection that you have delete access to, choose **The Collection and all the items in the Collection**.
5. Click **Done**.

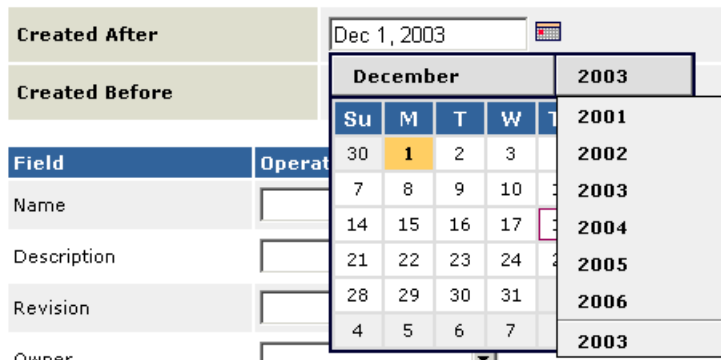
Entering Dates Using the Calendar

The Calendar tool is available throughout the MatrixOne applications whenever a date is required for a field. Picking a date from a calendar prevents you from having to remember specific date formats.

To select a date from the calendar

1. From any page that has a field that requires a date, click the **Calendar**  icon to the right of the field.

The calendar drops down from its present location. It shows the current month and year with the current day highlighted.



2. To change the month/year, click its name and select a month or year from the drop-down list.

3. When the desired month and year are displayed, click the day of the month.

The calendar automatically closes and displays the date you selected in the proper format in the text field.

Viewing History


You can view the history of many items in MatrixOne applications, such as the history for parts, documents, routes, and tasks. Anyone who can access the category list and Properties page for an item can view history for the item. You can access the History page for most items by accessing the category list for the item and then clicking the History category. For a few kinds of items, you may have to click a History link on a page to see history for an item. For instructions on how to access history for a particular type of item, see the online help or user guide for the application you are using.

Standard History Page

The History page for most items lists all events that have occurred for the item. If the item can have multiple revisions, then the page shows only the events for the revision you are working with. The earliest history entry for every object is the create action. This tells you when the object was created and who created it. The originator may not be the current owner.

This graphic shows an example of a standard History page for a part.

Molded Part CM-202030-01: History

Action Type * ... and * 

Date	User	Action	Action Details	State	Message
Aug 9, 2002 3:16:36 PM	Test Everything	connect	Design Responsibility from Department Mechanical Design Company Name Mechanical Design	Release	
Aug 9, 2002 3:16:24 PM	Test Everything	connect	New Part / Part Revision from ECO ECO	Release	
Aug 9, 2002 3:16:17 PM	Test Everything	override		Review	
Aug 9, 2002 3:16:17 PM	Test Everything	promote		Release	
Aug 9, 2002 3:16:16 PM	Test Everything	override		Preliminary	
Aug 9, 2002 3:16:16 PM	Test Everything	promote		Review	
Aug 9, 2002 3:16:06 PM	Test Everything	connect	Part Family Member from Part Family CM	Preliminary	
Aug 9, 2002 3:16:06 PM	Test Everything	connect	EBOM from Mechanical Part CM	Preliminary	
Aug 9, 2002 3:16:01 PM	Test Everything	create		Preliminary	revised from:
Aug 22, 2002 10:49:08 AM	Test Everything	revised		Release	revision: Molded Part CM-202030-01 2

Date—The date and time of the action.

User—The user name of the person who initiated the action.

Action—The type of activity performed on the item, such as create, modify, connect, and so on.

Action Details—Details about the specific items involved in the action. For example, if the action is change owner, the details list the previous and new owners. If the action is connect, the details list the items that were connected.

State—The state the item was in when the action occurred.

Message—Additional information about the action, if any.

You can filter the list of history events by the action type or by any text in the other columns.

Some History pages might be designed to prevent filtering of the history events. In this case, the Action Type and/or text filter controls are not available.

To filter the list of history events

1. To filter the list of history events based on the action type:

a) Click the Browse (...) button next to the **Action Type** box.

The Select Action Types page opens, listing all action types in the history list.



b) Check the actions you want to see on the history page. All unchecked action types will be removed from the list.

c) Click **Done**.

The action types you checked are listed in the Action Types box on the History page.

2. To filter the list of history events by any text in all columns except Action Types, enter the text to filter on in the box to the left of the Filter button. Make sure you include the wildcard * at the beginning and end of the text.

For example, to filter the list so it shows only events performed by the user “Joe”, enter *Joe* in the box and click Filter. To see only the events that took place in July, enter *July* or *Jul* and click Filter.

3. After specifying your filter criteria, click **Filter**.

The History page lists only the events that meet your filter criteria.

All Revisions/Versions History Page

For some types of items, such as documents in Team Central, the History page shows events for all revisions (in some cases referred to as “versions”) of the item and the rows of history events are separated by revision (or version). When the History page first opens, only the events for the latest revision are displayed but you can refresh the page and show

the revisions you want to see, as described below. The following graphic shows an example of a part History page that includes events for all revisions.

Molded Part CM-202030-01: History From Rev: to Rev:

Action Type and

Revision 1

Date	User	Action	Action Details	State	Message
Aug 9, 2002 3:16:36 PM	Test Everything	connect	Design Responsibility from Department Mechanical Design Company Name Mechanical Design	Release	
Aug 9, 2002 3:16:24 PM	Test Everything	connect	New Part / Part Revision from ECO ECO	Release	
Aug 9, 2002 3:16:17 PM	Test Everything	override		Review	
Aug 9, 2002 3:16:16 PM	Test Everything	promote		Review	
Aug 9, 2002 3:16:06 PM	Test Everything	connect	Part Family Member from Part Family CM	Preliminary	
Aug 9, 2002 3:16:06 PM	Test Everything	connect	EBOM from Mechanical Part CM	Preliminary	
Aug 9, 2002 3:16:01 PM	Test Everything	create		Preliminary	revised from:
Aug 22, 2002 10:49:08 AM	Test Everything	revised		Release	revision: Molded Part CM-202030-01 2

Revision 2

Date	User	Action	Action Details	State	Message
Aug 22, 2002 10:49:12 AM	Test Everything	modify		Preliminary	Production Make Buy Code: Buy was: Make
Aug 22, 2002 10:49:12 AM	Test Everything	connect	Part Family Member from Part Family CM	Preliminary	

You can filter the All Revisions History page by action type and by text in other columns just as described for the standard History page. Additionally, you can specify the revisions that you want to see history for.

To choose the revision/versions you want to see history for

1. Use the **From** and **to** lists in the upper right corner of the page to specify the revisions/versions you want to see.
 - To show events for one revision only, choose that revision number in both the From and to list.
 - To show events for multiple revisions in ascending order (revision 1 first, then revision 2 and so on), choose the lowest revision number in the From list and the highest in the to list.
 - To show events for multiple revisions in descending order (revision *n* first, then revision *n*-1 and so on), choose the highest revision number in the From list and the lowest in the to list.
2. Click **Refresh**.

Using Page History

Page History lists the last 50 pages that you have visited since you last logged in. You can use this list of pages to:

- Quickly revisit pages you've visited recently.
Accessing some pages from Page History may require fewer clicks than accessing them through an application's Search feature or through the Navigator pane. Using Page History to revisit pages is also handy if you've forgotten the exact steps for accessing the page.
- Bookmark a page using your browser's Favorites or Bookmark feature.
For pages that you access very often or so infrequently that you forget how to find the page, add the page to your browser's Favorites or Bookmark list. Like any favorite/bookmark, you can customize the link name and organize links into folders.
- Share the address (URL) for a page with another person who uses the MatrixOne application.
Copy and paste the URL for a page into an email message. Recipients can click the link and go right to the page. As always, if the person isn't already logged in, they will have to do so and the person must have the appropriate access rights to view the page. If the user doesn't have the access rights to view the page, an error message displays.

Page History includes all pages that you visited by clicking links on the:

- My Desk menu
- Actions menu
- global Toolbar
- Navigator pane menus and trees

Page History does not include pages that you visited by clicking links:

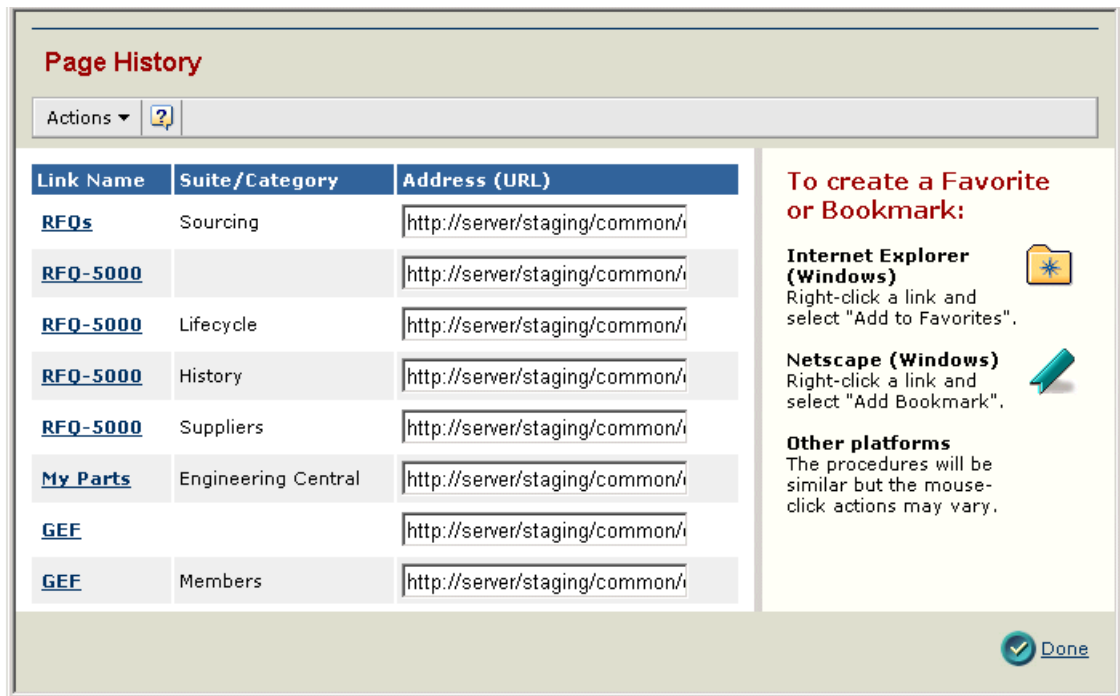
- In page Action menus, such as Edit Details, Copy Selected, etc.
- Within tables, such as a link to edit an attribute listed in a table
- For individual IconMail messages, although the IconMail page from the toolbar is included and the attachment page for a message (when you click the Attachment category for a message).

Page history includes all the pages listed above that you visit, even pages for items that are subsequently deleted. For example, suppose you visit the Properties page for a part and then delete that part from the database. Page History will still list the Properties page. If you click the link to go to the Properties page, the system displays an error message.

To use Page History to revisit a page, bookmark pages, or share links to pages

1. Click **Page History** from the global toolbar.

The Page History page opens, listing up to the last 50 pages you visited since you logged in. If you just logged in or your session times out, no pages are listed. The most recent pages are listed at the top.



For each visited page, Page History shows:

Link Name—For links from the My Desk or Actions menus, the Link Name is the same as the link name on the menu. For links within the Navigator pane, the Link Name is the name of the item whose information you are viewing, such as the part name. Click the link to go to the page.

Suite/Category—For links from the My Desk or Actions menus, this is the application the link is for, such as Sourcing or Team. For links within the Navigator pane, it is the category within the item's menu or tree, such as Attachments. If the link is for the root category, showing the Properties page for the item, this column is empty. For links from the toolbar, "Toolbar" is displayed here.

Address (URL)—The URL for the page, which you can copy and paste into an email message to invite another MatrixOne applications user to visit the page.

2. To revisit a page that you visited during this session, click the link for the page name under the **Link Name** column.

Depending on where that type of page normally appears, the page either appears in the main application window or in a popup window. For example, search pages and create pages appear in popup windows. Pages that contain a table with rows of items of a particular type, such as a Parts page, and pages that show properties for an item display in the main application window.

The popup window with Page History remains open but is in the background.

3. To copy the address (or URL) for a page so you can invite another user to visit the page:
 - a) Right-click in the **Address (URL)** column for the page and choose **Select All** from the shortcut menu. (Alternatively, use the browser's shortcut for selecting text in a field. For example, in Internet Explorer, triple-click with the left mouse button anywhere in the field. In Netscape, double-click.)

- b)** Right-click again in the column and choose **Copy** from the shortcut menu (or press **Ctrl+C**).
 - c)** Go to the email message or document that you want to include the URL in.
 - d)** With the insert cursor positioned where you want to paste the URL, right-click and choose **Paste** from the shortcut menu (or press **Ctrl+V**).
 - e)** Send the email or document to the recipient as appropriate.
- 4.** To bookmark a page so you can return to it quickly using your browser's Favorites or Bookmarks list:
 - a)** Right-click on the link for the page name under the **Link Name** column.
 - b)** From the shortcut menu, choose the appropriate option for your browser:
 - For Internet Explorer, choose **Add to Favorites**. Rename the page name as needed to ensure that you'll recognize it in the future and specify an appropriate folder.
 - For Netscape, choose **Add Bookmark**. After creating the bookmark, you can edit its name and place it in a folder as needed.
- 5.** To update Page History with pages that you have visited since you opened Page History, move the window to the front and click **Refresh** from the page Actions menu.
- 6.** When you're finished using Page History, click **Done**.

Accessing a Bookmarked Page or a Page in a Link Sent to You

To access a MatrixOne application page that you previously added as a favorite or bookmark, choose the page name from the browser's list of favorites/bookmarks.

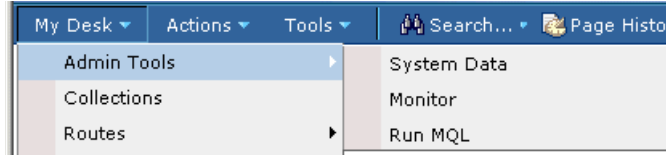
If you receive an email message that contains a link to a MatrixOne application page, click the link. If the URL isn't clickable, copy and paste it into your browser's address (URL) field.

For both ways of accessing an application page, if you are already logged in and have the appropriate access to the page, the page opens. If you aren't already logged in, you'll have to do so before the page displays.

Depending on where that type of page normally appears, the page either appears in the main application window or in a popup window. For example, pages that contain a table with rows of items of a particular type, such as a Parts page, and pages that show properties for an item display in the main application window. Search pages and create pages appear in a popup window. If you are just logging in and the link is for a page that displays in a popup window, the main application window appears in the background, open to your preferred Home page.

Administration Tools

When users who are assigned the Administration Manager role log into the MatrixOne application, the Actions menu includes an Admin Tools menu, which has three links: System Data, Monitor and Run MQL.



Viewing System Data

The System Data page displays static configuration data for the Matrix system, as derived from the MQL `print config notfull` command. For details, see the Troubleshooting chapter of the *Matrix PLM Platform Installation Guide*. The report can be filtered to show specific subsections.

To view system data

1. Click **My Desk>Admin Tools>System Data** from the global toolbar.
2. Select one of the following subsections of the report from the drop-down filter or select All to display the entire report. The default is All.
 - All
 - Matrix Kernel JVM system properties
 - Matrix Kernel local environment
 - Matrix default settings
 - Matrix general settings
 - Operating System Kernel settings
 - Matrix Boot file settings

Each subsection is populated with name value/pairs. Since some of the values/pairs are machine dependent, the values for the settings may not match exactly with the same report run at different setup.

*By design, Matrix restricts access to some information printed by `print config to System Administrators only`. This access can be defined in *Business Modeler*.*

Viewing Session Monitor

Clicking **My Desk>Admin Tools>Monitor** from the global toolbar opens the Monitor page, which displays session-based Matrix Collaboration Server information. The session statistics are useful for developers in debugging ADK processes and monitoring memory usage.

The screenshot shows a window titled "Monitor: Admin Tools" with a toolbar containing a home icon and a help icon. Below the toolbar is a table with the following data:

Admin cache	5947028 bytes
Pooled session cache	0 bytes
Active	0 seconds
Last recorded cache size	0 (update requested; reissue mc
Total session cache size	0 bytes
Total threads	4
Total number of db connections	50
Total number of db disconnects	0
Total number of sql statements executed	214511
Total number of sql statements parsed	125601

This table lists the session information that is affected by Matrix or application server settings. All MX_ settings are Matrix environment variables. For information on these settings, see the *Matrix PLM Platform Installation Guide*.

Session Information	Affected by this setting:
Total threads	MX_MAX_THREAD, executeThreadCount WebLogic setting
Total number of db connections	MX_CONNECTION_POOL_SIZE
Total number of transactions timed out	MX_TRANSACTION_TIMEOUT, MX_ABORT_DANGLING_TRANSACTION
Number of free Tcl interpreters in pool	MX_PROGRAM_POOL_SIZE

Run MQL Admin Link

The Run MQL page lets the administrator run MQL commands and see the results of it. Since you have already logged in, context has been set. Do not enter the set context command. If you want to change context, log out and log back in with the other user name.

To run an MQL command

1. Click **My Desk>Admin Tools>Run MQL** from the global toolbar.
2. Enter the command in the **MQL Command** box.
3. Click **Run** (or press **Enter** on the keyboard).

The output displays in the Results box.



For details on MQL commands, see the *MQL Guide*.

Object Lifecycles

Overview

The policy that governs an object defines the object's lifecycle. A lifecycle is made up of one or more states that the object can be in. An object's state lets people know the object's status within the business process and determines who can access the object and what actions they can perform.

Lifecycle states can be associated with business process automation, so specific events and checks automatically occur when an object is promoted to a state. For example, when a Request for Quote (RFQ) is promoted to Sent in Sourcing Central, the system automatically creates a quotation for each supplier in the bid list. When a part is promoted to Release in Engineering Central, the system checks to make sure all component parts are in the Release state or beyond.

This section contains these topics:

- [Viewing an Object's Lifecycle](#)
- [Promoting and Demoting an Object](#)
- [Applying a Signature](#)

Following these sections, the lifecycles are listed in alphabetical order. To link to a specific lifecycle in online mode, click its name in the table of contents.

Viewing an Object's Lifecycle

You can often see the current state for an object from a summary page that lists the object or from the object's Properties page. For more information about an object's lifecycle, you need to look at the Lifecycle page, which shows:

- All states in the object's lifecycle and the sequence the object passes through the states, including any state branching that can occur
- The current state of the object
- Any signature requirements for promotion from each state and any signature that has been applied for each requirement
- Any routes that could block the promotion from each state, including the route's name, status, and description and a link to view details for the route

To view the lifecycle for an object

1. From the category list for the object, click **Lifecycle**. For example, the following shows the Lifecycle page for a part:

Indicates signature requirements must be fulfilled to promote to next state.

Darker blue box indicates object's current state.

Indicates there is a route that must be completed to promote to next state.

Collection1
Items
CM-202020-01 1
Alternate Parts
Approvals
Engineering Bill of Mat
EBOM Markups
ECOs
ECRs
Equivalents
Revisions
Spare Parts
Specifications
Reference Documents
Substitute Parts In
Where Used
Route
History
Lifecycle
Attachment

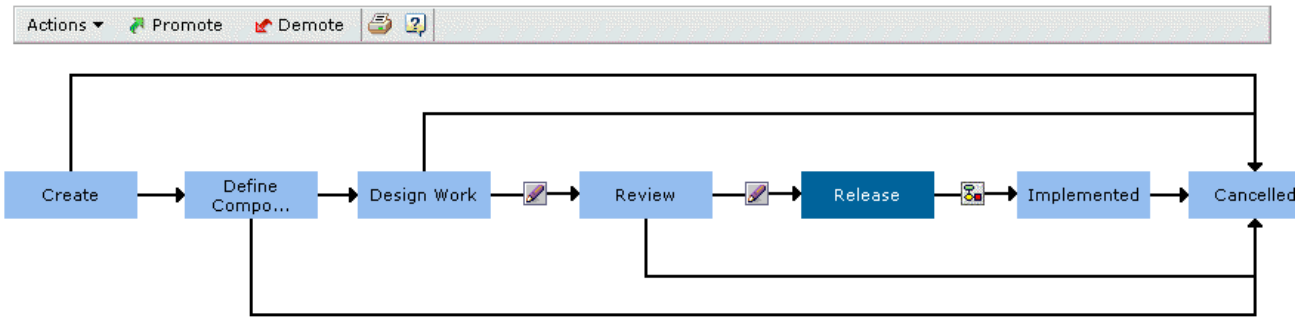
CM-202020-01 rev 1: Lifecycle


Actions Promote Demote

Preliminary Review Approved Release Obsolete

An object's policy can be set up to allow branching from a state. This means when the object is promoted from that state, it could go to the next state in the lifecycle or to another state in the lifecycle. If the policy is set up with branching, the Lifecycle page shows the branches, as with this Lifecycle page for an ECO.

ECO-007000 rev -: Lifecycle



- To see the routes that could block a promotion from a state, click  on the promotion arrow for that state (the arrow pointing to the next state in the lifecycle).

A Routes section appears at the bottom of the Lifecycle page, listing the routes that could block promotion for this state. These are routes that contain the object and for which the route creator has specified the state as a block promotion state. These routes must be completed in order to promote the object to the next state. To see details about the route, click its Name. The route's category list and Properties page open in a new window.

Collection1

- Items
 - CM-202020-01 1
 - Alternate Parts
 - Approvals
 - Engineering Bill of Mat
 - EBOM Markups
 - ECOs
 - ECRs
 - Equivalentents
 - Revisions
 - Spare Parts
 - Specifications
 - Reference Documents
 - Substitute Parts In
 - Where Used
 - Route
 - History
 - Lifecycle
 - Attachment

CM-202020-01 rev 1: Lifecycle


Actions Promote Demote ?

```

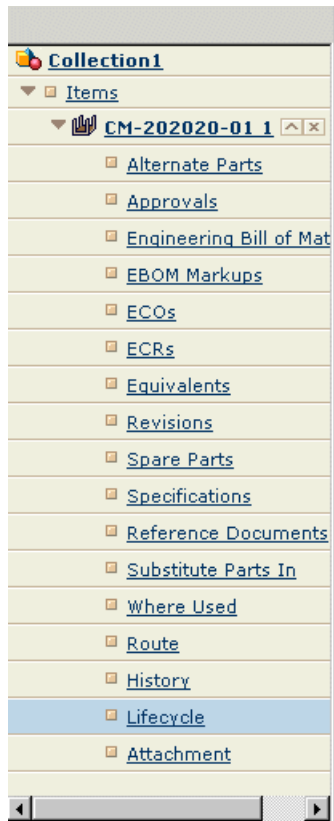
      graph LR
        Preliminary --> Review
        Review --> Approved
        Approved --> Release
        Release --> Obsolete
        Review --> Preliminary
        Approved --> Review
        Release --> Review
    
```

Routes: Approved

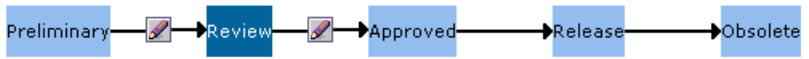
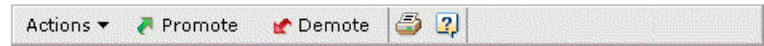
Name	Status	Description
Route-R-0000103	Not Started	The description of this route is...

- To view signature requirements and any applied signatures for a state, click  on the promotion arrow for that state (the arrow pointing to the next state in the lifecycle).

An Approvals section appears at the bottom of the Lifecycle page, listing the signatures that are required before the object can be promoted. If someone has applied a signature, the details are listed to the right of the signature name.



CM-2020-01 rev 1: Lifecycle



Approvals : Review

Signature	Signer	Comments	Response
	Senior Manufacturing Engineer		

4. Work with the lifecycle as needed:

- To promote or demote the object, click **Promote** or **Demote** from the page toolbar or Actions menu. See [Promoting and Demoting an Object](#).
- To apply a signature, see [Applying a Signature](#). Applying a signature includes approving the object for promotion, rejecting it for promotion, and waiving a signature requirement.

Promoting and Demoting an Object

If the Auto Promote feature is enabled in the object's policy, the system promotes the object automatically when all requirements are met. Otherwise, people with promote access can manually promote the object from its current state to the next. If the policy has signature requirements, they must be met before promoting.


People with demote access can demote an object from its current state to the previous state. For example, a major redesign in a product might cause it to be demoted from its current state back to its previous state.


To promote or demote an object

- From the category list for the object you want to promote or demote, click **Lifecycle**. The Lifecycles page opens and shows the object's lifecycle. The current state is indicated with a dark blue box. For example, the following shows the Lifecycle page for a part.

The screenshot displays the 'Lifecycle' page for object 'CM-202020-01 rev 1'. On the left, a navigation pane lists various object types, with 'Lifecycle' selected. The main content area shows a horizontal flowchart representing the object's lifecycle stages: Preliminary, Review, Approved, Release, and Obsolete. The 'Approved' stage is currently active, indicated by a darker blue background. Above the flowchart, an 'Actions' toolbar contains 'Promote' and 'Demote' buttons, along with other utility icons.

2. To promote the object to the next state in its lifecycle:

a) If the promotion arrow pointing to the next state has a , make sure all signature requirements are met. See [Applying a Signature](#).

If the promotion arrow pointing to the next state has a , there is a route that must be completed before you can promote the object.

If the lifecycle branches to more than one state, the promotion will be to the state whose signature requirements are satisfied.

Some applications may handle branched lifecycles differently and not allow promotions to be made using the Lifecycle page. For example, to cancel an ECO in Engineering Central, you click Cancel ECO on the ECO Properties page. For instructions on promoting or demoting to a branched state for a particular type of object, see the online help or user guide for the application you are using.

b) When all signature requirements are met and all blocking routes are complete, click **Promote** from the page Actions menu or toolbar.

If the promotion is successful, the next state's box turns to a darker blue, indicating that the object has been promoted to that state.


If a promotion requires a signature and the signature has not been given, an error message displays, listing the unfulfilled signature requirements.

The promotion may also fail for other reasons. For example, a promotion could fail if items have not been connected, if connected items have not been promoted to the expected state, or if the object is in a route that has not yet been completed. If the promotion fails, the system displays a message explaining the reason.

3. To demote the object to the previous state in its lifecycle, click **Demote** from the page Actions menu or toolbar.


The previous state's box turns to a darker blue, indicating the object has been demoted to that state.

Applying a Signature

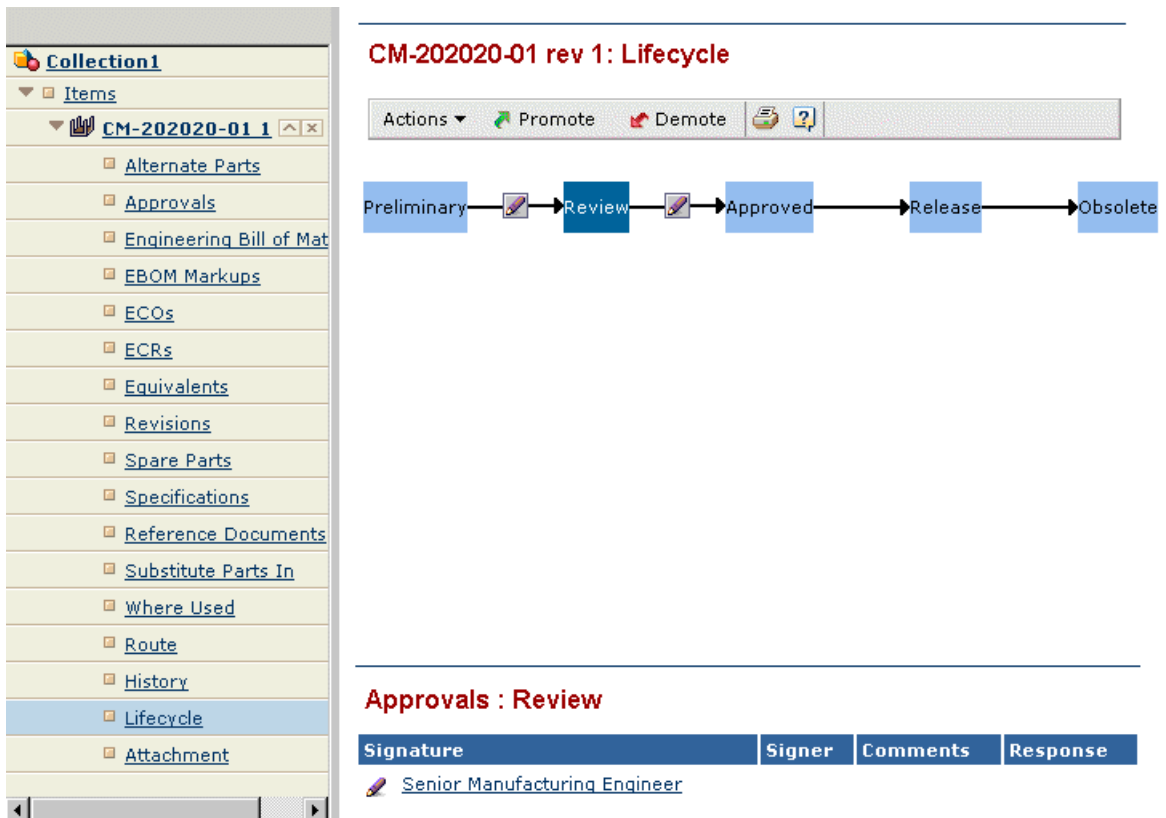
The  icon on the promotion arrow in a lifecycle indicates that one or more signatures are required before the object can be promoted. Use this procedure to apply your signature to indicate:

- you approve of the object's promotion
Or
- you reject the object's promotion; the object will not be promoted until the signature is changed to approve or ignore
Or
- the signature requirement is not needed and can be ignored

To apply a signature for an object's promotion



1. From the category list for the object, click **Lifecycle**.
2. For the promotion you want to apply a signature for, click .

An Approvals section appears at the bottom of the Lifecycle page, listing the signatures that are required before the object can be promoted. If someone has applied a signature, the details are listed to the right of the signature name.




CM-202020-01 rev 1: Lifecycle

Actions Promote Demote

Preliminary  Review  Approved Release Obsolete

Approvals : Review

Signature	Signer	Comments	Response
 Senior Manufacturing Engineer			

- Click the name of the signature requirement you want to work on, for example, Senior Design Engineer or Senior Manufacturing Engineer. If the signature name is not hyperlinked, the signature requirements do not apply to the current state. If a signature has already been applied, the comments and approval action you choose will replace the existing signature.

The Approval page opens.

The screenshot shows the 'Approval' page. At the top, there is a title bar with the word 'Approval' in red. Below this is a message: 'Fields in red italics are required'. The main content area is a table with two columns. The left column has headers 'Approval' and 'Comments'. The right column has a header 'Senior Manufacturing Engineer' and a text area. Below the text area are three radio buttons: 'Approve', 'Reject', and 'Ignore'. The 'Action' label is in red italics. At the bottom right are 'Done' and 'Cancel' buttons.

- Enter **Comments** about the signoff action you are applying.
If you reject the promotion, you should explain what needs to be done to make the promotion acceptable. If you ignore the signature, you might want to explain why the signature is not needed. Other users will see your comments when they view signatures for the object.
- Choose an approval **Action**.
Approve—Indicates that you approve the object’s promotion.
Reject—Indicates that you reject the object’s promotion. Enter your reasons in the Comments box. The object cannot be promoted with a Reject signature.
Ignore—Indicates that this signature requirement is not necessary for promotion.
- Click **Done**.
If you chose an action that the object’s policy does not allow you to perform or if you do not have access to fulfill this signature requirement, the system presents an error message that tells you why the signature cannot be applied. For example, the policy might allow you to approve the promotion but not to ignore it.
- Your system might be configured so the Verify Password page opens. If so, you need to enter your password for security reasons. Enter the **Password** you use to log in and click **Done**.

The Approvals section of the Lifecycle page now shows your user name next to the signature, the comments you entered, and the action you chose.

Budget Lifecycle

Anyone with access to a project can view the lifecycle for its budget. The Financials lifecycle has two states: Plan and Plan Frozen. The project owner, Project Lead, and Financial Reviewer for a project can promote a budget to Plan Frozen. Only the Financial Reviewer can demote the budget back to Plan.

Budget states are controlled by the Financial Items policy.

Plan

Project Leads, the project owner, and the Financial Reviewer define cost and benefit categories and enter planned amounts for the categories. Once the planned amounts are entered and stable, any of these people can promote the budget to Plan Frozen.

Plan Frozen

Project Leads and the project owner can only enter estimated and actual amounts for cost and benefit categories. They can only enter estimates and actuals for a previous period if no amount has been entered for the period. Once an actual is entered for a previous month, neither the estimate nor the actual can be edited.

The Financial Reviewer can continue to update planned amounts. No one can add new categories or delete categories when in Plan Frozen.

Build Lifecycle

The lifecycle of a build consists of the six states shown below. The main tasks performed in each state are listed under the state.

Plan State

In the Plan state, a Product Manager or Software Manager plans for a new build, creates the build object, and promotes it to the Build state.

Build State

In the Build state, a Product Manager or Software Manager executes the build and promotes it to the Internal Testing stage.

Internal Test State

In the Internal Test state, a Product Manager or Software Manager performs various internal tests on the build. When internal tests are passed, the build is promoted to the External Test state.

External Test State

In the External Test state, a Product Manager or Software Manager performs various external tests on the build. When external tests are passed, the build is promoted to the Complete state.

Complete State

In the Complete state, a Product Manager or Software Manager confirms the various tests on the build and the status is set to Complete.

Release State

In the Release state, a build can be used with a product.

Business Goal Lifecycle

Program Central users who are employees of the host company can view the lifecycle for a business goal.

Created

Only host company employees who are assigned the Business Manager role can create business goals. When a goal is created, its state is Created. This is the only state during which subgoals can be added and the goal can be deleted.

Active

When an assigned project is promoted to the Active state, the business goal is automatically promoted to Active. Alternatively, the Business Manager can promote the goal to Active manually.

Complete

When the last assigned project is promoted to the Complete state, the application automatically promotes the business goal to Complete. Business goals in the Complete state cannot be edited but if they need to be revised, Business Managers can demote them back to Active.

CAD Drawing Lifecycle

The CAD drawing is processed by moving it through the states in its lifecycle. For example, in the first state, a new CAD drawing is created and connected to the appropriate ECO and part objects. The Design Engineer then performs whatever CAD work is necessary to generate the new file(s) and checks them into the CAD drawing object. The owner of the CAD drawing then promotes it to the Review state. Only the owner of a CAD Drawing can change its state.

If the CAD drawing is in a route, the route may be set up to prevent the CAD drawing from being promoted until the route is complete.

The following describes the states included in the CAD drawing lifecycle:

Preliminary

New CAD drawings are created in the Preliminary state. A CAD drawing's name can be automatically generated or calculated by the owner. In either case the Create New CAD drawing page is used to generate the CAD drawing and connect it to the appropriate ECO and part objects.

The owner performs whatever CAD work is necessary to generate the new file(s), then checks them into the object and promotes it to the Review state.

As the CAD drawing leaves the Preliminary state, the following checks are fired:

- The CAD drawing must be connected to an ECO via the ECO New Drawing Revision relationship.
- All earlier revisions of this CAD drawing must be at the Release state.

If these checks pass, the CAD drawing will be promoted to the next state.

Review

The CAD drawing is reviewed and approved from the Review state by the Responsible Manufacturing Engineer. The review should include viewing its file(s). The permissions in this state do not allow any new files to be checked into the CAD drawing. Once the Responsible Manufacturing Engineer is satisfied that the CAD drawing correctly defines the part(s) it is intended to specify, s/he promotes it to the Release state.

If the CAD drawing is connected to a part with the "Part Specification" relationship, then there must be an ECO connected to the CAD drawing before it can be promoted to the Release state. No associated ECO is necessary if the CAD drawing is not connected to a part, or if it is connected to a part with the "Reference Document" relationship only.

Approved

After the CAD Drawing enters the Approved state, all affected items connected to the CAD Drawing's ECO are checked to see if they are also in the Approved state. If all affected items are in the Approved state, the ECO is automatically promoted to the Review state. If any single affected item connected to the ECO is in a state prior to Approved, the ECO is not promoted to the Review state.

A trigger is available (but is inactive, by default) to block ECO affected items from being promoted to the Release state unless the connected ECO is already in the Release state.

Release

As a CAD drawing enters the Release state, an Action fires that disconnects all Part Specification relationships between the previous revision of this CAD drawing and its parts then connects identical Drawing Specification relationships between those same parts and this CAD drawing. This process has the same effect as if float were defined on the TO end of the Part Specification relationship.

Another Action also fires as the CAD drawing enters the Release state that automatically changes the owner of the CAD drawing to be a special user in the system, "Corporate." This locks down the CAD drawing so no additional changes can be made and it removes the CAD drawing from the engineer's desk.

In the Release state no disconnections of any relationships are allowed. Connections are however permitted to ECR objects that want to revise the CAD drawing.

CAD Model Lifecycle

The CAD model is processed by moving it through the states in its lifecycle. For example, in the first state, a new CAD model is created and connected to the appropriate ECO and part objects. The Design Engineer then performs whatever CAD work is necessary to generate the new file(s) and checks them into the CAD model object. The owner of the CAD model then promotes it to the Review state. Only the owner of a CAD model can change its state.

If the CAD model is in a route, the route may be set up to prevent the CAD model from being promoted until the route is complete.

The following describes the states included in the CAD model lifecycle:

Preliminary

New CAD models are created in the Preliminary state. A CAD model's name can be automatically generated or calculated by the owner. In either case the Create New CAD model page is used to generate the CAD model and connect it to the appropriate ECO and part objects.

The owner performs whatever CAD work is necessary to generate the new file(s), then checks them into the object and promotes it to the Review state.

As the CAD model leaves the Preliminary state, the following checks are fired:

- The CAD model must be connected to an ECO via the ECO New Drawing Revision relationship.
- All earlier revisions of this CAD model must be at the Release state.

If these checks pass, the CAD model will be promoted to the next state.

Review

The CAD model is reviewed and approved from the Review state by the Responsible Manufacturing Engineer. The review should include viewing its file(s). The permissions in this state do not allow any new files to be checked into the CAD model. Once the Responsible Manufacturing Engineer is satisfied that the CAD model correctly defines the part(s) it is intended to specify, s/he promotes it to the Release state.

If the CAD model is connected to a part with the "Part Specification" relationship, then there must be an ECO connected to the CAD model before it can be promoted to the Release state. No associated ECO is necessary if the CAD model is not connected to a part, or if it is connected to a part with the "Reference Document" relationship only.

Approved

After the CAD model enters the Approved state, all affected items connected to the CAD model's ECO are checked to see if they are also in the Approved state. If all affected items are in the Approved state, the ECO is automatically promoted to the Review state. If any single affected item connected to the ECO is in a state prior to Approved, the ECO is not promoted to the Review state.

A trigger is available (but is inactive, by default) to block ECO affected items from being promoted to the Release state unless the connected ECO is already in the Release state.

Release

As a CAD model enters the Release state, an Action fires that disconnects all Part Specification relationships between the previous revision of this CAD model and its parts then connects identical Drawing Specification relationships between those same parts and this CAD model. This process has the same effect as if float were defined on the TO end of the Part Specification relationship.

Another Action also fires as the CAD model enters the Release state that automatically changes the owner of the CAD model to be a special user in the system, "Corporate." This locks down the CAD model so no additional changes can be made and it removes the CAD model from the engineer's desk.

In the Release state no disconnections of any relationships are allowed. Connections are however permitted to ECR objects that want to revise the CAD model.

CTQ Lifecycle

Anyone with access to a project can view the lifecycle for its CTQs. The Quality lifecycle has two states: Initiated and Controlled. The CTQ lifecycle is driven by its quality metrics: the system automatically promotes the CTQ to Controlled when a quality metric is added with a Source of Controlled. If the CTQ doesn't have a Controlled metric, it cannot be promoted to Controlled. If a CTQ needs to be edited after it has been promoted to Controlled, Project Leads and the project owner can demote the CTQ to Initiated. If the Controlled metric is still in the CTQ's metric list after the edits are made, the CTQ can be manually promoted to Controlled.

CTQ states are controlled by the Quality Metric policy.

Initiated

A Controlled quality metric has not been added yet. The CTQ can be edited and more metrics can be added.

Controlled

A Controlled metric has been added. When a CTQ is in the Controlled state, it cannot be edited or deleted. If the CTQ needs to be updated, the Project Lead/owner must demote the CTQ to Initiated.

Development Part Lifecycle

The Part Development policy is the default for all creations of type Part. The Designer or Senior Designer has the ability to create new parts with the Part Development policy or the EC Part (production) policy. See [EC Part Lifecycle](#).

The purpose of the Part Development policy is to allow engineering the ability to design new parts in a controlled environment until one of the revisions is released to Production.

The development process allows for multiple design iterations to be created (Revisions) along with ad-hoc reviews at any time in the part lifecycle. In other words, a development part may have multiple revisions active and not released at the same time.

The following describes the states included in the Part Development lifecycle:

Preliminary

New parts and new part revisions are created in the Preliminary state. The Preliminary state is used to generate the “defining documentation,” drawing print, for the part. At this state no revisions can be created. Only the owner and any other user granted access (for example, Responsible Design Organization) can view the part.

The Design Engineer must perform the following tasks at this state:

- Make visible to selected users (Design Responsibility)
- Add/update attributes
- If Item is an Assembly:
 - Add Items to Structure
 - Add EBOM Attributes

As the Part leaves the Preliminary state, the following Checks are fired:

- At least one Part Specification connection or Reference Document connection must exist regardless of the object type related. For the Part Specification the object type can be a drawing print, CAD model, or CAD drawing. For the Reference Document, the related object type can be any Document (subtype) or a Sketch.
- The related document must have at least one file checked in.
- At least one Design Responsibility connection must exist regardless of the object type related. Design Responsibility can be assigned only to organizations (subsidiaries, business units, or departments) within the host company.

Review

This is a lightweight “Peer Review” process that does not require any lifecycle signature. The owner of the part can promote to the Review state without any signature or ad-hoc route. Customers can easily add new signatures using Business Modeler or add a trigger that will force the existence of a route.

At this state the part cannot be revised nor changed by the owner. If the owner needs to make any changes to the part, the part must be demoted back to the Preliminary state. Visibility to the part remains the same as in the Preliminary state: Owner and organization with Design Responsibility for the part. The owner is limited to “view only” at this state. No changes to the Part metadata are allowed on this state.

Complete

The Complete state is the state where the part can be revised for another cycle of design changes or the part can be formally prepared for the Production process.

At this state the part is revisable by the owner. Visibility remains to the owner and the RDO given access at the Preliminary state. The owner is limited to “view only” at this state; no modifications are allowed except revision of the part.

Document Lifecycle

Generic Documents are a business type used to store files and metadata information. Documents are contained in Books.

Create

The document is created.

WIP

The WIP state is used to designate that the document is being modified.

Review

The document requires a signature to be promoted to Released,

Released

The document has been approved.

Obsolete

The document is no longer used.

Document Sheet Lifecycle

Document Sheets are associated with Documents.

WIP

The WIP state is used to designate that the document sheet is being modified.

Active

The document sheet is active and available to users.

Inactive

The document sheet is inactive and can no longer be used.

Drawing Print Lifecycle

The drawing print is processed by moving it through the states in its lifecycle. For example, in the first state, a new drawing print or drawing print revision is created and connected to the appropriate ECO and part objects. The Design Engineer then performs whatever CAD work is necessary to generate the new file(s) and checks them into the drawing print object. The owner of the drawing print then promotes it to the Review state. Only the owner of a drawing print can change its state.

If the drawing print is in a route, the route may be set up to prevent the drawing print from being promoted until the route is complete.

The following describes the states included in the drawing print lifecycle:

Preliminary

New drawing prints and new drawing print revisions are created in the Preliminary state. A drawing print's name can be automatically generated or calculated by the owner. In either case the Create New Drawing Print or Create New Drawing Print Revision pages are used to generate the drawing print and connect it to the appropriate ECO and part objects.

The owner performs whatever CAD work is necessary to generate the new file(s), then checks them into the object and promotes it to the Review state.

As the drawing print leaves the Preliminary state, the following checks are fired:

- The drawing print must be connected to an ECO via the ECO New Drawing Revision relationship.
- All earlier revisions of this drawing print must be at the Release state.

If these checks pass, the Drawing Print will be promoted to the next state.

Review

The drawing print is reviewed and approved from the Review state by the Responsible Manufacturing Engineer. The review should include viewing its file(s). The permissions in this state do not allow any new files to be checked into the drawing print. Once the Responsible Manufacturing Engineer is satisfied that the drawing print correctly defines the part(s) it is intended to specify, s/he promotes it to the Release state.

If the drawing print is connected to a part with the "Part Specification" relationship, then there must be an ECO connected to the drawing print before it can be promoted to the Release state. No associated ECO is necessary if the drawing print is not connected to a part, or if it is connected to a part with the "Reference Document" relationship only.

Approved

After the drawing print enters the Approved state, all affected items connected to the drawing print's ECO are checked to see if they are also in the Approved state. If all affected items are in the Approved state, the ECO is automatically promoted to the Review state. If any single affected item connected to the ECO is in a state prior to Approved, the ECO is not promoted to the Review state.

A trigger is available (but is inactive, by default) to block ECO affected items from being promoted to the Release state unless the connected ECO is already in the Release state.

Release

As a Drawing Print enters the Release state, an Action fires that disconnects all Part Specification relationships between the previous revision of this drawing print and its parts then connects identical Drawing Specification relationships between those same parts and this drawing print. This process has the same effect as if float were defined on the TO end of the Part Specification relationship.

Another Action also fires as the drawing print enters the Release state that automatically changes the owner of the drawing print to be a special user in the system, "Corporate." This locks down the drawing print so no additional changes can be made and it removes the drawing print from the engineer's desk.

In the Release state no disconnections of any relationships are allowed. Connections are however permitted to ECR objects that want to revise the Drawing Print.

Drawing Print Markup Lifecycle

The Markup lifecycle defines the process for drawing print markups. The single state in the Markup lifecycle is Exists.

Exists

When a new drawing print markup is created and connected to the appropriate drawing print object, the Design Engineer then performs whatever work is necessary to generate the new file(s) and checks them into the drawing print markup object.

EC Part Lifecycle

The EC Part lifecycle defines the process for creating, reviewing and releasing parts. The Designer or Senior Designer has the ability to create new parts with the Part Development policy or the EC Part (production) policy. See *Development Part Lifecycle*.

The part is processed by moving it through the states in its lifecycle. For example, in the first state, the part object is created and connected to an ECO and drawing print. An Engineering Bill of Material is also created and connected to the part, specifying how it is to be created. The owner of the part then promotes it to the next state to send it to internal reviewers. When the review process is complete, it is promoted to the Release state. Only the owner or co-owner of a part can change its state.

If the part is in a route, the route may be set up to prevent the part from being promoted until the route is complete.

The following describes the states included in the EC Part lifecycle:

Preliminary

New parts and new part revisions are created in the Preliminary state. A part may have its name automatically generated or calculated by the user and given to the system. In either case the Create Part or Revise Part pages are used to generate the part and connect it to the appropriate ECO and drawing print objects.

Once a part is created, the Bill of Material page is used to build its Bill of Material, a comprehensive definition of materials (and their effectivity dates) required to manufacture the product. The user can also copy another part's Bill of Material by using the Copy EBOM command link. Drawing print objects are created and attached to the part as required during this step in the process.

Once the owner of the part has completed building the Bill of Material and connecting the appropriate drawing prints, s/he promotes the object to the Review state.

Because of the following checks, the user is required to promote the part from the bottom up. That is, the drawing prints must be promoted before their respective parts and the components must be promoted before their respective assemblies.

As the Part leaves the Preliminary state, the following Checks are fired:

- All Component Parts attached via the EBOM relationship ("From" direction) must be at or beyond the Review state.
- All drawings attached via the Part Specification relationship must be at or beyond the Review state.
- The part must be connected to an ECO via the ECO New Part Revision relationship.
- All earlier revisions of this part must be at or beyond the Release state.
- All Component Parts attached via the EBOM relationship ("From" direction) must be the Latest Released Revision of that Part Name.
- At least one Part Specification connection must exist regardless of the object type related. The object type can be a drawing print, CAD model, CAD drawing or any other type added to the Part Specification relationship.
- The related document must have at least one file checked in.

- At least one Design Responsibility connection must exist regardless of the object type related. Design Responsibility can be assigned only to organizations (subsidiaries, business units, or departments) within the host company.

If all of these Checks pass, the Part will be promoted to the next state.

Review

The part is reviewed and approved in this state by the Responsible Manufacturing Engineer using the ECO Properties page. The review should include the parts attributes, Bill of Material, and drawing print.

The Responsible Manufacturing Engineer makes adjustments to attributes like Effectivity and Estimated Cost as necessary. The permissions in this state do not allow any relationships below this part to be made or broken.

Once the Responsible Manufacturing Engineer is satisfied that the part can be manufactured consistent with its intent, s/he promotes it to the Release state.

Because of the following checks, the user is required to promote the parts from the bottom up.

As the Part leaves the Review state, the following checks are fired:

- All Component Parts attached via the EBOM relationship (“From” direction) must be at or beyond the Release state.
- All Drawings attached via the Part Specification relationship must be at or beyond the Release state.
- If there are one or more manufacturer equivalent parts connected, at least one must be in the Release state.

If these checks pass, the part will be promoted to the next state.

Approved

After the part enters the Approved state, all affected items connected to the part’s ECO are checked to see if they are also in the Approved state. If all affected items are in the Approved state, the ECO is automatically promoted to the Review state. If any single affected item connected to the ECO is in a state prior to Approved, the ECO is not promoted to the Review state.

A trigger is available (but is inactive, by default) to block ECO affected items from being promoted to the Release state unless the connected ECO is already in the Release state.

If a part has equivalent parts connected to it, one or more of the equivalent parts must be in the Release state before this part can be promoted to Release.

Release

As a Part enters the Release state, the following Actions fire:

- If the EBOM connection is from the highest release of a part, the following steps are performed:
 - An identical EBOM History relationship is created between the parts. This connection has all the same attribute values as the EBOM connection.
 - The End Effectivity Date is set on the EBOM History connection is set to (the date the component part is released - 1 second).
 - The EBOM connection is floated to the newly released component part.

- The Start Effectivity Date on the EBOM connection is set to the date the component part is released.
- The End Effectivity Date on the EBOM connection is kept blank (no end effectivity date).

This provides tracking to be able to determine which parts were connected to an assembly when it was released.

- If the EBOM connection is from an in-process part, the action disconnects all EBOM relationships between the previous revision of this Part and its next assemblies (“To” direction) then connects identical EBOM relationships between those same next assemblies and this Part. This process has the same effect as if float were defined on the “To” end of the EBOM relationship.
- If the EBOM connection is from a previous release of a part (previous to the latest released revision), then the EBOM connection is left as is. There is no need for an EBOM History connection.
- The next action disconnects the Part Specification relationship between the previous revision of this part and its drawing print then connects an identical Part Specification relationship between that same drawing print and this part. For mass EBOM changes, an option can be set to disable this action.
- The last action automatically changes the owner of the part to be a special user in the system, “Corporate.” This locks down the part so no additional changes can be made and it removes the part from the engineer’s desk.

Once in the Release state no connections or disconnections of any relationships below a part will be allowed. Connections above the part will however be permitted to both ECR objects that want to revise the part and to other parts that want to use this part in their Bill of Material.

Design Responsibility relationships can be disconnected at any point in the lifecycle. If you want other users in the company to be able to see the part after it is released, you should disconnect any Design Responsibility relationships, since only the owner and users who are members of the organization that has design responsibility for the part have read/show access to the part.

At some point in time it may be determined that a part should be made obsolete. When this occurs a person who belongs to the special Role, Product Obsolescence Manager, can login and promote the Part to Obsolete.

Obsolete

In this state, the part cannot be used in any new Bills of Material. This is accomplished by changing permissions such that no connects above the part are allowed. Once in the Obsolete state only the Product Obsolescence Manager will be able to demote the object back to the Release state.

ECR Standard Lifecycle

The ECR is processed by moving it through the states in its lifecycle. For example, in the first state, a new ECR is created and connected to the appropriate product line. The owner connects supporting documents and then promotes the ECR to the Submit state, where the ECR Coordinator assigns an ECR Evaluator and promotes the ECR to the Evaluate state, and so on. Only the owner of a ECR can change its state.

If the ECR is in a route, the route may be set up to prevent the ECR from being promoted until the route is complete.

The following describes the states included in the ECR (Standard) lifecycle:

Create

An ECR's name is automatically generated and it is connected to a Product Line object using a Create ECR page. The ECR Originator has the option to create Sketch objects and attach them to the ECR as Supporting Documentation. The Originator also has the option to connect parts and drawings to the ECR using the Build ECR page. Once the ECR Originator has completed building the ECR, s/he promotes it from the Create state to the Submit state.

Submit

As the ECR enters the Submit state, an action fires that automatically routes the ECR to the correct ECR Coordinator based on the product line that is connected. The correct ECR Coordinator is determined from an attribute on the product line called change board. This attribute will contain the name of a group that has exactly one user with the role ECR Coordinator. An IconMail is sent and the ECR is reassigned to this user when it enters the Submit state. The ECR Coordinator assigns an ECR Evaluator and promotes the ECR to the Evaluate state.

Evaluate

As the ECR enters the Evaluate state, an action fires that automatically routes the ECR to the user who is the assigned ECR Evaluator. The ECR Evaluator reviews the change description, the supporting documentation, and all attached parts and drawings. The Evaluator may add additional information to the ECR and attach more Supporting Documentation.

The Evaluator can also use the category list to attach additional parts and drawings or even change some of the existing connections based on her/his knowledge of how the change is actually likely to be done.

The Evaluator ensures that all part dispositions are set correctly. Based on the evaluation, the ECR may be returned to the ECR Originator for clarification or promoted to the Review state where a change board will review and approve the ECR.

Review

As the ECR enters the Review state, an action fires that automatically routes the ECR to the correct ECR Chairman based on the product line that is connected (in a similar fashion to what occurs when entering the Submit state). The ECR Chairman decides which users are required to approve the ECR and submits the ECR. The members of the change board are notified via IconMail.

The board members use the Review ECR page to review all supporting documentation and Part Dispositions to determine their impact.

The Chairman also assigns a Responsible Design Engineer and schedules a date when s/he expects the ECR approval to be completed.

Upon the last signature being approved, the ECR will auto-promote to the next state. If the ECR is not approved within the allotted time period, the ECR Chairman may reject the ECR, call a meeting to discuss why the change board has not approved the ECR, or approve the ECR without Board consent.

Plan ECO

As the ECR enters the Plan ECO state, an action fires that automatically routes the ECR to the user who is the assigned Responsible Design Engineer. A wizard automatically launches where you can associate the ECR with a new or existing ECO at this time. See “Associating an ECO with an ECR” in the *Engineering Central User Guide*.

A configurable trigger (the Business Administrator can make it inactive) attempts to automatically revise affected items connected to the ECR with the Request Part Revision relationship (if the affected item is a part) or the Request Specification Revision relationship (if the affected item is a drawing print, CAD model or CAD drawing).

First the trigger checks whether the ECR is connected to exactly one ECO. If this check fails, the following error message is shown:

```
Automatic revisioning is not possible because this ECR is
connected to more than one ECO.
```

If this check passes, the trigger evaluates each affected item to check if it satisfies the following conditions:

- The affected item has a revision sequence from which the ‘next’ revision can be determined.
- The current user has revise access on that affected item.

If both these checks pass, then the trigger revises the affected item and connects the new revision to the ECO with the New Part / Part Revision relationship (if the affected item is a Part) or the New Specification / Specification Revision relationship (if the affected item is a drawing print, CAD model or CAD drawing).

The current owner of the affected item is maintained as the owner of the revised object.

If either of the above two checks fail, then the trigger skips it and moves on to the next affected item. After all possible revisions have been made, a warning message is shown with the names of skipped items. For example:

```
The following affected items could not be automatically revised:
PT-504, PT-630.
```

Complete

As the ECR enters the Complete ECR state, an action fires that automatically changes the owner of the ECR to be a special user in the system “Corporate.” This has the effect of locking down the ECR so no additional changes can be made and it removes the ECR from the engineer’s desk.

Rejected

As the ECR enters the Rejected state, an action fires that notifies the ECR Originator that the ECR is not going to be done and routes the ECR back to the Originator. The policy is changed to ECR (Rejected). The Originator will have the opportunity to review the reason

the ECR is not going to be done and can either remove (delete) the ECR from the system or re-submit it with a better explanation of why the change is required.

ECR Supporting Document Lifecycle (Sketch)

The ECR Supporting Document lifecycle defines the process for creating and reviewing sketches.

The sketch is processed by moving it through the states in its lifecycle. For example, in the Preliminary state, a new sketch is created and connected to the appropriate ECR object. The Design Engineer then performs whatever CAD work is necessary to generate the new file(s) and checks them into the sketch object. The owner of the sketch then promotes it to the Complete state.

If the sketch is in a route, the route may be set up to prevent the sketch from being promoted until the route is complete.

The following describes the states included in the ECR Supporting Document lifecycle:

Preliminary

When the sketch object is created, it is in the Preliminary state. Files can be checked in, checked out and updated.

Complete

When sketches are final, the object is promoted to the Complete state. Only the owner of a sketch can change its state. No files can be checked in while the sketch is in this state, but files can be checked out. If files need to be changed, the owner can demote the sketch.

ECO Lifecycle

The ECO is processed by moving it through the states in its lifecycle. For example, in the first state, a new ECO is created and connected to the appropriate ECR object. The owner assigns a Responsible Design Engineer and a Responsible Manufacturing Engineer and then promotes the ECO to the Define Components state, where parts and drawing prints are attached to the ECO. The Responsible Design Engineer promotes the ECO to the Design Work state, and so on. Only the owner of a ECO can change its state.

If the ECO is in a route, the route may be set up to prevent the ECO from being promoted until the route is complete.

The following describes the states included in the ECO (Standard) lifecycle:

Create

An ECO's name is automatically generated and it is connected to the appropriate ECRs using the Create ECO Page. The ECO Originator assigns the Responsible Design Engineer and the Responsible Manufacturing Engineer. The ECO Originator then promotes the ECO object to the Define Components state.

Define Components

As the ECO enters the Define ECO Components state, an action fires that automatically routes the ECO to the user who is the Responsible Design Engineer. The Responsible Design Engineer reviews the ECRs that are attached to the ECO and determines which parts and drawing prints need to be attached to the ECO. The Responsible Design Engineer uses the Create Part and Create Drawing pages to create/revise and attach these objects to the ECO using the appropriate relationships. The Responsible Design Engineer fills in the appropriate Disposition Code and Change Description attributes that are on the relationships. The Responsible Design Engineer then promotes the ECO to the Design Work state.

Design Work

As the ECO enters the Design Work state, the permissions change that prevent any relationships from being made or broken. Once in the Design Work state, the Responsible Design Engineer notifies Draftsmen and Design Engineers that they have work to do on this ECO and indicates which parts and drawing prints they are responsible for completing by making them the owner of these objects as required.

These other Design Engineers and Draftsmen perform whatever CAD and Bill of Material work is necessary to ready these objects for review. Once they have performed all the necessary work, they notify the Responsible Design Engineer that s/he can review the package.

If the package is not acceptable, the Responsible Design Engineer notifies the user responsible for making the correction.

If the package is acceptable, the Responsible Design Engineer signs and promotes the drawing prints and parts to the Review state.

When any affected item connected to the ECO is promoted to the Approved state, all other affected items connected to the ECO are checked to see if they also are in the Approved state. If all affected items are in the Approved state, the ECO is automatically promoted to the Review state. If any single affected item connected to the ECO is a state prior to Approved, the ECO is not promoted to the Review state. A configurable trigger prevents

the ECO from manually being promoted to the Review state unless all affected items are have been approved. See the *Engineering Central Administrator Guide* for details.

Review

As the ECO enters the Review ECO state, an action fires that automatically routes the ECO to the user who is the Responsible Manufacturing Engineer. The Responsible Manufacturing Engineer reviews the disposition codes and sets the effectivity dates on the new parts accordingly. S/he may also update other part attributes like Lead Time and Estimated Cost. If the package is not acceptable, s/he demotes the ECO back to the Design Work state, which automatically notifies the Responsible Design Engineer.

If the package is acceptable, the Responsible Manufacturing Engineer promotes the ECO to the Release state. By default, all affected items are also automatically promoted to the Release state. This is configurable. See the *Engineering Central Administrator Guide* for details.

Release

As the ECO enters the Release state, an action fires that automatically changes the owner of the ECO to be a special user in the system “Corporate.” This locks down the ECO so no additional changes can be made and removes the ECO from the engineer’s desk.

Implemented

The ECO Implemented state closes the loop of the change process. This state provides verification and visibility that a change, as published by Engineering, has in fact been implemented in the factories. It is a “closure” check to ensure that other processes have worked.

Incident Lifecycle

The lifecycle of an incident consists of the seven states shown below. The main tasks performed in each state are listed under the state.

Submit State

In the Submit state, any user can submit an incident. When the incident is promoted to the Evaluate state, a trigger is fired notifying the Product Manager who owns the product of the newly created incident.

Evaluate State

In the Evaluate state, a Software CCB Coordinator, System Transition Manager, or System Conversion Manager evaluates the incident. Triggers are fired when promoting from this state to:

- ensure that the incident has been assigned to a person
- ensure that an impact analysis has been done
- notify CCB Board members of their assignment.

Review State

In the Review state, a Software CCB Coordinator, System Transition Manager, or System Conversion Manager reviews the impact analysis made for the incident. A trigger is fired when promoting from this state notifying all related Incident Assignees of their assigned incident.

Assign State

In the Assign state, assignees work on the incidents. A System Transition Manager or System Conversion Manager reviews incident and if it passes, promotes it to the Implement state.

Implement State

In the Implement state, the change is included in whatever sector required. A System Transition Manager or System Conversion Manager promotes the reviewed incident to the Validate state.

Validate State

In the Validate state, the change is checked to ensure that it is complete and has not introduced any new problems. A System Transition Manager or System Conversion Manager validates the change and promotes to the next stage. Triggers are fired when promoting from this state, notifying the owner of the incident that the incident is now closed and promoting the related Impact Analysis object to the complete state.

Close State

In the Close state, a System Transition Manager or System Conversion Manager adds comments and closes the incident.

Issue Lifecycle

All users can list issues. However, only the Issue Manager can change the owner or the type for an issue.

Create

An issue can be created by any user. Upon creation of an Issue depending on the Category and Classification the issue owner of the Issue is changed to an Issue Manager associated with that Classification. The issue manager begins the analysis of the Issue and enters the Estimated Dates, and then promotes to the Assign state.

Assign

This state assigns person(s) to the issue. Optionally, the owner of the issue can complete the issue early if a resolution was executed. A resolution can be as simple as a phone call to the customer or a user error. A person get notified as soon as he is added as an assignee to an issue. A notification is send to the originator that the issue is being looked into. The Estimated Start and Finish Date cannot be changed beyond this point.

Active

Upon promotion to this state, the Actual Start Date is automatically populated with the system date. The issue is now considered started and Assignee(s) can work on the issue.

Review

Issue is sent for Approval, using the routing for approval process.

Closed

Upon promotion to this state, the Actual End Date is automatically populated with the system date. The Issue is now considered closed. Upon closure of the issue the originator needs to be notified that the issue has been Closed.

Manufacturer Equivalent Lifecycle

Basically, the Manufacturer Equivalent lifecycle is the same as the *EC Part Lifecycle*, with the following additions to the Release and Obsolete states:

Release

The Component Engineer is responsible for promoting manufacturer equivalent parts to the Release state when the part definition is complete. When an equivalent part is promoted to this state, connections are maintained to the last released and/or in process revisions of its enterprise part, and history connections are maintained to the previous enterprise part. This is handled by the release state action trigger.

The Manufacturer Equivalent History relationship accommodates this delayed float logic. This relationship has all the same attributes as the Manufacturer Equivalent relationship. Both of these relationships have the attributes Start Effectivity Date and End Effectivity Date.

On the initial connection of a manufacturer equivalent part, the Start Effectivity Date and End Effectivity Date on the manufacturer equivalent part are both blank. It is not until the enterprise part is promoted to the Release state that the Start Effectivity Date is set to the released date of the enterprise part.

As a Part enters the Release state, the following Action fires:

- When an enterprise part is released, the Start Effectivity Date on the Manufacturer Equivalent relationships between this enterprise part and the equivalent part is set to the released date of this enterprise part.

If the part that is being released is determined to be an equivalence part, then the following actions are performed:

- If the Manufacturer Equivalent connection is from the highest release of an enterprise part, the following steps are performed:
 - An identical Manufacturer Equivalent History relationship is created between the parts. This connection has all the same attribute values as the Manufacturer Equivalent connection.
 - The End Effectivity Date is set on the Manufacturer Equivalent History connection to the date the equivalent part is released minus 1 second. (The subtraction of 1 second is so that the end effectivity date on the Manufacturer Equivalent History connection is not identical to the start effectivity date on the Manufacturer Equivalent connection)
 - The Manufacturer Equivalent connection is floated to the newly released equivalent part.
 - The Start Effectivity Date on the Manufacturer Equivalent connection is set to the date the equivalent part is released.
 - The End Effectivity Date on the Manufacturer Equivalent connection is kept blank (no end effectivity date since this is the last released revision)
- If the Manufacturer Equivalent connection is from an in-process enterprise part, then the Manufacturer Equivalent relationship is floated to the new released equivalent part. There is no need for a Manufacturer Equivalent History connection here.

- If the Manufacturer Equivalent connection is from a previous release of an enterprise part (previous to the latest released revision), then the Manufacturer Equivalent connection is left as is. There is no need for a Manufacturer Equivalent History connection here.

Obsolete

As a Part enters the Obsolete state, the following Action fires:

- When a equivalent part is promoted to Obsolete a trigger will set the End Effectivity Date on the Manufacturer Equivalent relationship between that part and its enterprise part to the date this part enters the Obsolete state.

Member List Lifecycle

Member lists group people into a single list and this list attached to a specification or route.

Active

Prior to assigning a member list to a specification or route, it must be activated. Only Specification Managers, Route Managers, and Organization Managers can activate a list. Any new list created is in the Inactive state by default.

Inactive

Only Specification Managers, Route Managers, and Organization Managers can deactivate a member list. The list exists in the database but cannot be used.

Model Lifecycle

The lifecycle of a model consists of the five states shown below. The main tasks performed in each state are listed under the state.

Preliminary State

In the Preliminary state, a Product Manager defines the models of the product line. The Product Manager or System Engineer then promotes the model to the Marketing state.

Marketing State

In the Marketing state, a Marketing Manager adds the marketing text, marketing name and attaches marketing images of the model. The Marketing Manager then promotes the model to the Review state.

Review State

In the Review state, a Product Manager reviews the model and its structure before activating the model. The Product Manager then promotes the model to the Active state.

Active State

In the Active state, a Product Manager activates the use of the model, making it available for placing orders against. When the company decides not to sell the model, the Product Manager promotes it to Inactive.

Inactive State

In the Inactive state, a Product Manager inactivates the use of the model, making it not available for sale. If an inactive model is offered for sale again, the Product Manager can demote it back to Active.

Part Family Lifecycle

The part family lifecycle defines the process for part families. The only two states are Exists and Obsolete.

When a new part family object is created, its lifecycle state is Exists. It remains in this state as long as the part family is in use. The part family can be promoted by the owner to the Obsolete state when it is no longer required.

Part Quality Plan Lifecycle

A Part Quality Plan (PQP) is processed by moving it through the states in its lifecycle. For example, in the first state, a draft PQP is created and connected to the appropriate part and supplier. Only Advanced Quality Engineers (AQE) can create and delete PQPs. Other users can view information about PQPs that they have access to.

The following describes the states included in the PQP lifecycle:

Draft

New PQPs are created in the Draft state. A PQP's name can be automatically generated or entered by the owner or co-owner. In either case the Create New Part Quality Plan page is used to generate the PQP and connect it to the appropriate part and supplier objects. Content can be added in the Folders category in support of the PQP.

If the **Allow Role Edits** option is set, all members of the AQE role can edit the PQP. The owner or co-owner of the PQP then promotes it to the Active state.

As the PQP leaves the Draft state, the following checks are fired:

- The PQP must be connected to a Part.
- The PQP must be connected to a Supplier.

If these checks pass, the PQP will be promoted to the next state.

Active

The PQP can be promoted from the Active state by the originator or, if Allow Role Edits was specified, by other AQEs. A PQP can be associated with a route to allow others to review it, however this will not affect the ability to promote the PQP. A Work Breakdown Structure can also be defined for the PQP. Once the originator/AQE is satisfied that the PQP correctly defines quality plan for the part and supplier, s/he promotes it to the Completed state.

As the PQP leaves the Active state, the following checks are fired:

- All *Mandatory* WBS Tasks must be completed.

Completed

In the Completed state, you cannot do the following:

- Disconnect a part or supplier from the PQP.
- Edit the attributes of the PQP.
- Remove or add folders to the Folders category.
- Modify the Work Breakdown Structure.

You can do the following:

- Create, modify, or delete content in a folder.

Part Quality Plan Template Lifecycle

A Part Quality Plan (PQP) Template is processed by moving it through the states in its lifecycle. For example, in the first state, an inactive PQP Template is created. Only Advanced Quality Engineers (AQE) can create and delete PQP Templates.

The following describes the states included in the PQP Template lifecycle:

Inactive

New PQP Templates are created in the inactive state. The Create New PQP Template page is used to generate the PQP Template.

Active

The PQP Template can be promoted to the Active state by the originator.

Product Lifecycle

The lifecycle of a product consists of the six states shown below. The main tasks performed in each state are listed under the state.

Preliminary State

In the Preliminary state, a Product Manager, System Engineer, Software Engineer, or Senior Design Engineer creates a product, then promotes it to the Product Management state.

Product Management State

In the Product Management state, a Product Manager or System Engineer adds features, marketing related rules, images, and reference documents.

Design Engineering State

In the Design Engineering state, a Design Engineer or Senior Design Engineer adds parts, and engineering related rules, reviews the structure and rules of the product.

Review State

In the Review state, a Product Manager, System Engineer, Design Engineer, or Senior Design Engineer performs a final review.

Release State

In the Release state, a Product Manager updates the pricing, as needed. A trigger is fired that promotes all rules connected to the product to the Release state.

Obsolete State

In the Obsolete state, a Product Manager inactivates the use of the product and the product is no longer sold.

Product Configuration Lifecycle

Preliminary State

In the Preliminary state, a Product Manager, System Engineer, Customer, or Sales or Design Engineer creates a product configuration, which specifies the configuration product and revision, the options ordered and quantities.

Valid Configuration State

In the Valid Configuration state, a Product Manager or System Engineer checks the configuration against the rules defined for the product. In this state, the Validate Configuration action determines if the product configuration is valid or invalid.

If a customer creates a product configuration using the wizard, the validation occurs as the configuration is created. The application promotes the product configuration to the Generate Precise BOM state, skipping the Valid Configuration state.

If the validation is successful, the validate program changes the validate status attribute to "Validation Passed." The Order Entry Clerk or Product Manager promotes the configuration to the Generate Precise BOM state.

Generate Precise BOM State

When a product configuration enters the Generate Precise BOM state, an Order Entry Clerk creates a Precise BOM by running the Generate Precise BOM action. A Precise BOM is a list all of the top-level parts needed to build the configuration. The action checks the part inclusion rules defined for the product to see which GBOM parts should be included given the ordered options. The Precise BOM can then be transferred to the company's manufacturing floor (MRP) system and the Order Entry Clerk promotes the product configuration to the Active state.

Sales or customers can select configurations and place orders once the Product Configuration is in the Generate Precise BOM state and Active states.

Active State

In the Active state, a Product Manager activates the use of the product configuration, making it available for placing orders against. The configuration is valid and a Precise BOM exists for it. Customers or sales can create sales orders against active product configurations.

When the companies decide not to sell the product configuration, the product manager promotes the configuration to the Inactive state.

Inactive State

In the Inactive state, a Product Manager inactivates the use of the product configuration. The Inactive state means customers or sales cannot order the product configurations. If an Inactive product configuration is offered for sale again, the Product Manager can demote the configuration back to the Active state.

Product Feature Lifecycle

The lifecycle of a product feature consists of the six states shown below. The main tasks performed in each state are listed under the state.

Preliminary State

In the Preliminary state, a Product Manager, System Engineer, Software Engineer or Senior Design Engineer creates a product feature.

Product Management State

In the Product Management state, a Product Manager or System Engineer adds sub-features, marketing related rules, images, and reference documents. They also review the structure and rules defined for each feature.

Design Engineering State

In the Design Engineering state, a Design Engineer or Senior Design Engineer adds parts, and engineering related rules, creates a generic BOM, reviews the structure and rules of the feature.

Review State

In the Review state, a Product Manager, System Engineer, Design Engineer or Senior Design Engineer performs a final review. A trigger is fired when promoting from this state which will validate all rules for the context feature and the sub-features connected to it. If a sub-feature has no further features connected to it, it will only be validated.

Release State

In the Release state, a Product Manager updates the pricing, as needed. The sub-features list is frozen and changes cannot be made at this stage. A trigger is fired when demoting from this state which demotes all the rules connected to the feature to the Preliminary state.

Obsolete State

In the Obsolete state, a Product Manager inactivates the use of the product feature and the product is no longer sold.

Product Line Lifecycle

The product line lifecycle defines the process for product lines. The only two states are Planned and Complete. Only the owner of a product line can change its state.

The following describes the states included in the product line lifecycle:

Planned

A product line object is created and the change board is selected from one of the change board groups defined for the business. When the product line is ready to be used, the owner promotes the object to the Complete state, and ECRs can then be connected to it.

Complete

Only product lines that are in the Complete state are available for selection on the Create ECR page.

Program Lifecycle

Program Lifecycle

In Program Central, a program is a collection of projects. Anyone with access to a program can view its lifecycle.

Active

A program is active once it is created. A Program Lead or External Program Lead can create a new program.

Inactive

A program can be inactivated by the person who created the program or by a Program Lead.

Project Lifecycle

Only people assigned to the Project Lead and External Project Lead roles can create a project (although any Engineering Central user can create a project concept). When you create a project, you automatically become the owner but you can then assign ownership to someone else. Anyone with access to a project can view its lifecycle.

Project states are controlled by the Project Space policy.

Create

Create the project, define the WBS, and assign members to the project.

Assign

Notify members of assigned tasks.

Active

Complete project tasks and submit deliverables.

Review

Review all tasks and deliverables.

Complete

All tasks are approved.

Archive

Save the project.

Project Template Lifecycle

The basic information associated with a project template is limited and serves mostly as a hook on which the WBS and associated questions can be hung. Only users assigned to the Project Administrator or External Project Administrator roles can create project templates. Anyone with access to a project template can view its lifecycle.

Active

The template can be used to create a project and is listed by default on the Project Templates page.

Inactive

The template cannot be used to create a template. To view the template, users must use the Inactive filter on the Project Templates page.

Project Concept Lifecycle

All Engineering Central users can create project concepts. Anyone with access to a project concept can view its lifecycle.

Concept

The creator just created the concept and is describing it.

Prototype

Create a sample of the finished product for review.

Review

Project members review the concept and prototype.

Approve

Project concept is approved for implementation.

Quality Lifecycle

Quality metrics define the counts or measurements in a project.

Quality states are controlled by the Quality Metric policy.

Initiated

A Controlled quality metric has not been added yet.

Controlled

A quality metric with a Controlled source has been added

Question Lifecycle

In Program Central, a question determines whether a task is added to a project or not. Anyone with access to a question can view its lifecycle.

Active


If assigned to a task, the question appears when a Project Lead creates a project based on the template. Depending on the response to the question, the assigned task is either included or not included in the project.

Inactive

The question can still be assigned to a task but it will not appear in the Create Project wizard when projects are created based on the template.

Quotation Lifecycle

A Quotation is processed by moving it through the states in its lifecycle. For example, a Request For Quotation (RFQ) is created and promoted through its lifecycle to the Sent state by Buyers. At this point, the Quotation object is generated in the Open state and moved through its lifecycle by Suppliers.

If the item is in a route, the route can be set up to prevent the item from being promoted until the route is complete. If there is a route that is blocking the promotion of the item, the Lifecycle page displays  in the arrow that points to the next state.

Only the owner and co-owners of a quotation can change its state.

For an overview of all the events that occur in each state, see Supplier Central help [Overview of RFQ Processing](#) in Chapter 4. For a summary of how to make changes to an RFQ during each state, see Supplier Central help [Making Changes to RFQs](#) in Chapter 4. For information on the prerequisites and consequences of changing an RFQ to a specific state, see:

- Supplier Central help [Making an RFQ Available for Review](#) in Chapter 4.
- Supplier Central help [Sending an RFQ to Suppliers](#) in Chapter 4.
- Supplier Central help [Closing the Bidding for an RFQ](#) in Chapter 4.
- Supplier Central help [Completing an RFQ](#) in Chapter 4.

The following describes the states included in the RFQ lifecycle:

Started

The Buyer adds suppliers and line items, and other optional components such as documents and attributes.

Initial Review

The Reviewers review and comment on RFQ.

Sent

The Buyer promotes to Sent to send the RFQ to suppliers. The system automatically creates a quotation for each supplier.

Response Complete

The system automatically promotes the RFQ to Response Complete when all quotations are returned. The Buyer makes line item award recommendations.

Final Review


The Reviewers review and comment on awards.

Complete

The Buyer promotes to Complete and system promotes all quotations to Closed.

Request for Quotation Lifecycle

A Request for Quotation (RFQ) is processed by moving it through the states in its lifecycle. For example, a Request For Quotation (RFQ) is created and promoted through its lifecycle to the Sent state by Buyers. At this point, the Quotation object is generated in the Open state and moved through its lifecycle by Suppliers. Upon completion of the lifecycle for a Quotation, the processing of the RFQ resumes and is promoted to Completion. This automatically promotes the Quotation to the Completed lifecycle state.

If the item is in a route, the route can be set up to prevent the item from being promoted until the route is complete. If there is a route that is blocking the promotion of the item, the Lifecycle page displays  in the arrow that points to the next state.

Only the owner and co-owners of an RFQ can change its state. For a description of all the events that occur in each state, see Supplier Central help, [Overview of Quotation Processing](#) in Chapter 5.

For information on the prerequisites and consequences of changing a quotation to a specific state, see:

- Supplier Central help, [Making a Quotation Available for Reviewers](#) in Chapter 5.
- Supplier Central help, [Returning a Completed Quotation to the Buyer](#) in Chapter 5.

The following describes the states included in the Quotation lifecycle:

Open

The supplier fills in required attributes, adds documents, and enters bid information. The supplier then promotes the Quotation to the Review state.

Review

Reviewers review, comment on, and approve the quotation. The supplier then promotes the Quotation to the Returned state.

Returned

Buyers evaluate the quotation and award line items in this lifecycle state.

Closed

The system automatically promotes the quotation to Closed when the buyer promotes the RFQ to Closed.

Requirement Lifecycle

The lifecycle of a requirement consists of the states shown below. The main tasks performed in each state are listed under the state.

Propose State

In the Propose state, a System Conversion Manager or System Transition Manager proposes a requirement.

Approve State

In the Approve state, a System Conversion Manager or System Transition Manager reviews and approves the requirements.

Complete State

In the Complete state, a System Conversion Manager or System Transition Manager views the requirements as complete.

Resource Lifecycle

The Resource policy controls the lifecycle of rules for products and features. The resource policy has only two states: Preliminary and Release.

Preliminary State

The user can create a new rule of any type only if the feature or product is not in the Release or Obsolete state. If the feature/product is in either of the above states, an error is shown when attempting to create a new rule.

Release State

If a rule is in the Release state, connected Features cannot be deleted.

When the product/feature is demoted from the Release state to the Preliminary state, a trigger will fire, demoting the connected rules to the Preliminary state.

Risk Lifecycle

The project owner and people assigned Project Lead access to a project in Program Central can create risks for the project. Anyone with access to a risk can view its lifecycle.

Create

The risk has just been created but no actual start date is assigned. This is the only state during which the risk can be deleted. After the owner enters the basic information and assigns people to the risk, the owner should promote the task to Assign, which is an indication to assignees that they can begin working on the risk.

Assign

The assignees should begin working on the risk by promoting it to Active, which populates the actual start date with the current date, or by entering an actual start date, which automatically promotes the risk to Active.

Active

The assignee is working on the risk.

Review

The risk is ready to be reviewed by other project or company personnel. Assignees should route the risk for review. When such a route is completed, the system automatically promotes the risk to Complete. Alternatively, the owner or assignee can manually promote the risk to Complete or enter an actual finish date, which promotes the risk.

Complete

The risk has been reviewed and is complete. When a risk is promoted to Complete, the system enters the current date as the actual finish date (entering the date may have triggered the promotion).

Route Template Lifecycle

A Route Template is either Active or Inactive.

Active

Active indicates that a Route Template is available for route creation.


Inactive

Inactive indicates that the Route Template cannot be used.

Specification Lifecycle

A Specification, or Technical Specification, is processed by moving it through the states in its lifecycle. This is done automatically by the system via the promotion of the connected Specification Change Order (SCO). The lifecycle for a Specification cannot be changed directly; it can only be promoted/demoted via the connected SCO.

Only Specification Managers and Specification Office Managers can create Specifications.

If the item is in a route, the route can be set up to prevent the item from being promoted until the route is complete. If there is a route that is blocking the promotion of the item, the Lifecycle page displays  in the arrow that points to the next state.

Listed below is a table that shows how the lifecycle states for an SCO will determine the state for the Specification. For example, if the SCO is promoted from the Draft state to the Peer Review state, the Specification, also in the Draft state, will be promoted to the Peer Review state. A separate SCO is needed to promote a Specification from the Issued state to the Obsolete state. Therefore the final row in this table shows how the automatic promotion to Obsolete occurs when the SCO applies to an already Issued Specification.

Object	Lifecycle States				
Specification Change Order (SCO)	Draft	Peer Review	Formal Approval	Final Check	Approved
Specification (New)	Draft	Peer Review	Formal Approval		Issued
Specification (Already Issued)	Issued				Obsolete

The following describes the states included in the Specification lifecycle as driven by the connected SCO. For details, see [Specification Change Order Lifecycle](#).

Draft

This is the initial state for a new Specification.

Peer Review

This state is controlled by the SCO.

Formal Approval

This state is controlled by the SCO.

Issued


This state is controlled by the SCO. When the connected SCO is Approved, the system automatically promotes the Specification to Issued.

Obsolete

This state is controlled by the SCO. A separate SCO is required to move a Specification from the Issued state to the Obsolete state. Once the SCO is promoted to the Approved state, the Specification will automatically be promoted to the Obsolete state.

Specification Change Order Lifecycle

A Specification Change Order (SCO) is processed by moving it through the states in its lifecycle. Specification Managers, Template Administrators and Specification Office Managers can create SCOs.

If the item is in a route, the route can be set up to prevent the item from being promoted until the route is complete. If there is a route that is blocking the promotion of the item, the Lifecycle page displays  in the arrow that points to the next state.

The following describes the states included in the SCO lifecycle:

Draft

To promote the SCO to the Peer Review state, at least one Approver List must be connected to the SCO. A Reviewer List may be connected to the SCO. If a Reviewer List is not connected to the SCO, the user will be presented with a warning message, but the SCO will still be promoted to the Peer Review state.

Peer Review

Reviewers listed on the Reviewer List must review, comment on, and approve the SCO in this lifecycle state. Once all assigned reviewers have approved the SCO, it is automatically promoted to the Formal Approval lifecycle state.

The owner of the SCO may also manually promote the SCO to Formal Approval without a completed Peer Review route.

Formal Approval

Reviewers listed on the Approver List must review, comment on, and approve the SCO in this lifecycle state. Once all assigned reviewers have approved the SCO, it is automatically promoted to the Final Check lifecycle state.

Final Check

The owner, or a co-owner, of the SCO reviews the information provided in the SCO and can promote the SCO to the Approved lifecycle state.

Some installations may use a default setting for Specification Central that bypasses the Final Check lifecycle state. In this case, once the Formal Approval state is completed, the SCO is promoted to the Approved state.


Approved

This lifecycle state indicates that the SCO has completed all lifecycle states.

Specification Template Lifecycle

A Specification Template is processed by moving it through the states in its lifecycle. This is done automatically by the system via the promotion of the connected Specification Change Order (SCO). The lifecycle for a Specification Template cannot be changed directly; it can only be promoted/demoted via the connected SCO.

Only Template Administrators and Specification Office Managers can create Specification Templates.

If the item is in a route, the route can be set up to prevent the item from being promoted until the route is complete. If there is a route that is blocking the promotion of the item, the Lifecycle page displays  in the arrow that points to the next state.

Listed below is a table that shows how the lifecycle states for an SCO will determine the state for the Specification Template. For example, if the SCO is promoted from the Draft state to the Peer Review state, the Specification Template, also in the Draft state, will be promoted to the Peer Review state. A separate SCO is needed to promote a Specification Template from the Approved state to the Obsolete state. Therefore the final row in this table shows how the automatic promotion to Obsolete occurs when the SCO applies to an already Approved Specification Template.

Object	Lifecycle States				
Specification Change Order (SCO)	Draft	Peer Review	Formal Approval	Final Check	Approved
Specification Template (New)	Draft	Peer Review	Formal Approval		Approved
Specification Template (Already Approved)	Approved				Obsolete

The following describes the states included in the Specification Template lifecycle as driven by the connected SCO. For details, see [Specification Change Order Lifecycle](#).

Draft

This is the initial state for a new Specification Template.

Peer Review

This state is controlled by the SCO.

Formal Approval

This state is controlled by the SCO.

Approved

This state is controlled by the SCO. When the connected SCO is Approved, the system automatically promotes the Specification Template to Approved.

Obsolete

This state is controlled by the SCO. A separate SCO is required to move a Specification Template from the Approved state to the Obsolete state. Once the SCO is promoted to the Approved state, the Specification will automatically be promoted to the Obsolete state.

Supplier Development Plan Lifecycle

A Supplier Development Plan (SDP) is processed by moving it through the states in its lifecycle. For example, in the first state, a draft SDP is created and is automatically connected to a supplier. Only Supplier Development Managers (SDMs) can create, edit, and delete SDPs. Advanced Quality Engineers (AQE) can view SDPs and related items such as lifecycle, deliverables, and discussions—and participate in discussions—for any supplier. Supplier Representatives can view plans and related items and participate in discussions for their company's plans. Supplier Representatives can also submit Supplier Development Plan deliverables

The following describes the states included in the SDP lifecycle:

Draft

New SDPs are created in the Draft state. A SDP's name can be automatically generated or entered by the owner. In either case the Create New Development Plan page is used to generate the SDP. The SDP is automatically connected to the Supplier that is currently displayed. Deliverables can be added to an SDP. The originator, a Supplier Development Manager, can promote the SDP to the Active state.

Active

The originator of the SDP can make additional edits to the SDP. Others can also review the SDP. The Supplier Representatives can also submit SDP Deliverables. Once the originator/SDM is satisfied that the SDP correctly defines development plan for the supplier, s/he promotes it to the Completed state.

As the SDP leaves the Active state, the following checks are fired:

- All SDP Deliverables must be completed.

Completed

Additional modifications to the SDP are permitted in the Completed state.

Supplier Development Plan Deliverable Lifecycle

A Supplier Development Plan (SDP) Deliverable is processed by moving it through the states in its lifecycle. For example, in the first state, a draft SDP Deliverable is created and is automatically connected to an SDP. Only Supplier Development Managers (SDMs) can create, edit, and delete SDP Deliverables. Advanced Quality Engineers (AQE) can view SDP Deliverables and related items such as lifecycle, files, and discussions—and participate in discussions. Supplier Representatives can view SDPs and SDP Deliverables, and related items and participate in discussions for their company’s plans. Supplier Representatives can also submit Supplier Development Plan deliverables

The following describes the states included in the SDP Deliverable lifecycle:

Draft

New SDP Deliverables are created in the Draft state. The SDP is automatically connected to the SDP that is currently selected. The SDP Manager can promote the deliverable to the Active state.

Active

The originator of the SDP Deliverable can make additional edits to the SDP Deliverable. Others can also review the SDP Deliverable, and Supplier Representatives can submit deliverables. Once the originator/SDP Manager is satisfied that the deliverables, s/he can promote the deliverable to the Completed state.

Completed

The Completed state is the final state for a deliverable.

WBS Task Lifecycle

If you own the project or are a Project Lead for the project, the top level that you have access to is the project, so you can add top-level tasks or add subtasks at any level in the WBS structure. If you are not an owner or Lead but are assigned to a WBS task, the top level that you have access to is that task. You can add subtasks under your assigned tasks or under any subtask under your assigned task. You cannot add a subtask to a task that is in the Review or Complete states.

Anyone with access to a WBS task can view its lifecycle.

WBS Task states are controlled by the Project Task policy.

Create

The task has just been created and an assignee specified. When a Project Lead is ready for work to begin on a WBS task, the Lead promotes it to Assign.

Assign

The system notifies assignees and the tasks appear by default on the assignee's WBS Tasks page.

Active

The assignees have begun work on the task. The system automatically promotes a task to Active when the % Complete is changed from 0% to any percentage less than 100. Alternatively, an assignee can promote the task to Active to indicate it is being worked on.

Review

Project members are reviewing the task and its deliverables. When 100% is entered for % Complete, the system automatically promotes the task to Review. Alternatively, the task can be promoted to Review and the system automatically changes the % Complete to 100%. Typically, an assignee creates a route to have route members review the task. The route can be created with the option to automatically complete the task upon completion of the route.

Complete

The task is complete. The system automatically promotes a task to Complete when an assignee enters an Actual Finish Date. Alternatively, an assignee can promote the task to Complete and the system enters the current date as the Actual Finish Date.

Index

A B C D E F G H I J K L M
N O P Q R S T U V W X Y Z

A

- About page 40
- about the software 40
- Actions menu 10
- Actions tab 11
- adding items to a collection 78
- address for pages 84
- ADK
 - debugging 87
- admin tool
 - monitor 87
 - system data 87
- Admin Tools 87
- Administration Manager role
 - tools 87
- advanced search 62
- application
 - help with 54
 - logging in 7
 - logging off 9
 - online Help 54
- applying a signature 96
- approvals for promotion 93
- approving
 - promotion 96
- attachments 35
- automation 91
- auto-revise affected items 117

B

- Back arrow 29, 32

- blocking routes 93
- bookmarking pages 84
- bookmarks 84
- branching lifecycle 92
- browser, quitting 9
- business process 91
- button. See tool.

C

- CAD drawing
 - search 59
- CAD model
 - search 59
- calendar, using 80
- categories in Context Navigator 23, 25
- Change Password tool 13
- changing vaults 69
- closing Context Navigator list 29
- Collaboration Server 87
- collaboration server 87
- collection
 - adding items 75
 - adding items to 78
 - creating 74, 75, 77
 - creating from search results 62
 - defined 74
 - deleting 77
 - editing details of 77
 - listing 76
 - properties 77
 - removing items from 78
- Context Navigator
 - categories 23
 - closing list in 29

- contracting 28
- expanding lists 28
- in popup window 27
- inserted items 25
- introduced 23
- managing 28
- moving item to top 29
- navigating within 28
- returning to previous list 29
- using Back arrow 29
- contracting
 - Context Navigator lists 28
 - Structure Navigator list 32
- currency conversion 45
- Currency Converter tool 14

D

- date
 - effectivity in EBOM history 114
 - effectivity in manufacturer equivalent history 124
 - entering using calendar 80
 - format 53
- debugging ADK 87
- default Home page 41
- demoting objects 94
- design responsibility
 - in EC Part lifecycle 114
- details of
 - any item 23
 - collection 77
 - object attached to IconMail 35
- drawing print
 - search 59

E

- EBOM markup
 - search 59
- ECO
 - auto-revise affected items 117
 - search 59
- ECR
 - auto-revise affected items 117
 - search 59
- effectivity date
 - in EBOM history 114
 - in manufacturer equivalent history 124
- entering text 51
- exiting browser 9
- expanding

- Context Navigator lists 28
- Structure Navigator list 32
- export format 42
- exporting table data 21

F

- favorites 84
- file
 - names 51
- filtering messages 34
- find like search 62
- fob 8
- format for export 42
- forwarding IconMail 38

G

- global toolbar
 - Actions 10
 - My Desk 10
 - Tools 10
- group
 - selecting 69

H

- help
 - printing help topics 58
 - using 54
 - with application 54
- Help About tool 40
- Help tool 14
- hiding Structure Navigator 32
- hierarchical items 29
- history
 - manufacturer equivalent 124
- history of
 - object 81
 - pages visited 84
- Home page
 - accessing 11
 - selecting preferred 41
- Home tool 11
- home tool 12, 13

I

- icon. See tool.
- IconMail
 - deleting 34
 - filtering messages 34
 - forwarding 38

- listing incoming messages 33
- reading 35
- replying 38
- sending new 36
- viewing attached object 35

IconMail tool 13
ignoring a signature requirement 96
incoming IconMail 33
Info tool 40

K

key fob 8

L

lifecycle

- applying signature 96
- branching 92
- introduction 91
- viewing 92
- viewing blocking routes 93
- viewing signature requirements 93

logging in 7
logging off 9
Logout tool 11, 13
logout. See logging off.

M

Macintosh

- file names 51
- quitting browser 9

manufacturer equivalent part

- history 124
- lifecycle 124

memory usage 87
message. See Icon Mail.
Monitor 87
monitor admin tool 87
Move to Top arrow 29, 32
moving to top 29, 32
MQL command 87
My Desk menu 10
My Desk tab 11

N

navigation tree. See Context Navigator and category list.
new mail

- reading 35
- sending 36

O

object

- details 35
- promoting and demoting 94
- search 59

online help. See help.

P

page

- bookmarking 84
- copying URL for 84
- history 84
- navigating in table pages 18
- revisiting 84
- toolbar 14

Page History tool 11, 12
pagination 18
part

- search 59

password

- changing 39
- entering when logging in 8

person

- selecting 69

Popup icon 28
popup window 27
preference

- export format 42
- Home page 41
- time zone 49

Print tool 14, 52
printing

- online help topic 58
- pages of application 52

product line

- search 59

program. See application.
promoting objects 94
properties of

- collection 77

Q

query. See search
quitting browser 9

R

reading IconMail 35
received IconMail 33
rejecting promotion 96

- removing items from a collection 78
- replying to IconMail 38
- revision
 - of object, history for 82
- revisiting pages 84
- role
 - selecting 69
- route
 - blocking lifecycle 93
 - in lifecycle 93
- Run MQL 87

S

- saved search 65
- search
 - advanced 62
 - find like 62
 - general 60
 - results
 - adding to collection 62
 - saved 65
- Secure ID 8
- selecting
 - group 69
 - person 69
 - role 69
 - type 67
 - vault 69
- selecting table rows 18
- sending new IconMail 36
- session monitor 87
- session statistics 87
- signature
 - applying 96
 - requirements 93
- signing objects 96
- signing on 7
- sketch
 - search 59
- software version 40
- sorting tables 21
- special characters
 - to avoid for entering text 51
 - to avoid for file names 51
- state. See lifecycle or status.
- statistics
 - session 87
- status 91
- Structure Navigator
 - contracting list 32
 - expanding list 32

- hiding 32
- introduction 29
- moving item to top 32
- returning to previous list 32
- showing 32
 - using Back arrow 32
- structured items 29
- subtype 67
- system data admin tool 87

T

- table
 - data export format 42
 - exporting data 21
 - navigating 18
 - paginating 18
 - selecting rows in 18
 - sorting 21
- table page 16
- text, entering 51
- time zone 49
- tool
 - Change Password 13
 - Currency Converter 14
 - Help 14
 - home 12, 13
 - IconMail 13
 - Logout 11, 13
 - Page History 11, 12
 - Print 14, 52
- toolbar 14
- Tools menu 10
 - menus
 - tools 12
- tree. See Context Navigator and category list.
- type, selecting 67

U

- unit of measure conversion 45
- URL for
 - logging in 7
 - pages 84
- username
 - entering when logging in 8
 - used for IconMail 33

V

- Value Chain Portfolio
 - logging in 7

logging off 9
vault
 selecting 69
version of software 40
versions, history for 82

