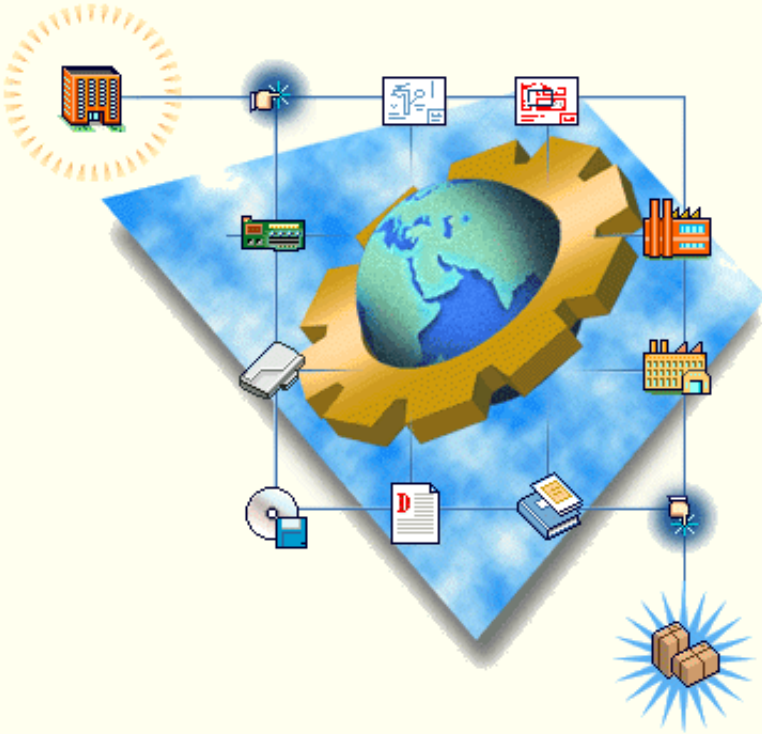


MatrixOne Common Components™

Version 10.5



User Guide



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DM-MX-35-10-50

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Searching for Objects

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

Search is conducted from specific locations within Common Components, such as when searching for a vault when creating a company definition. You search for people, for example, from many Edit Details pages that contain an Owner field with an ellipsis button.

The objects you can search for are dependent on the role(s) you are assigned.

The following sections explain the search processes:

Using Search

Selecting a Vault


Finding and Selecting People

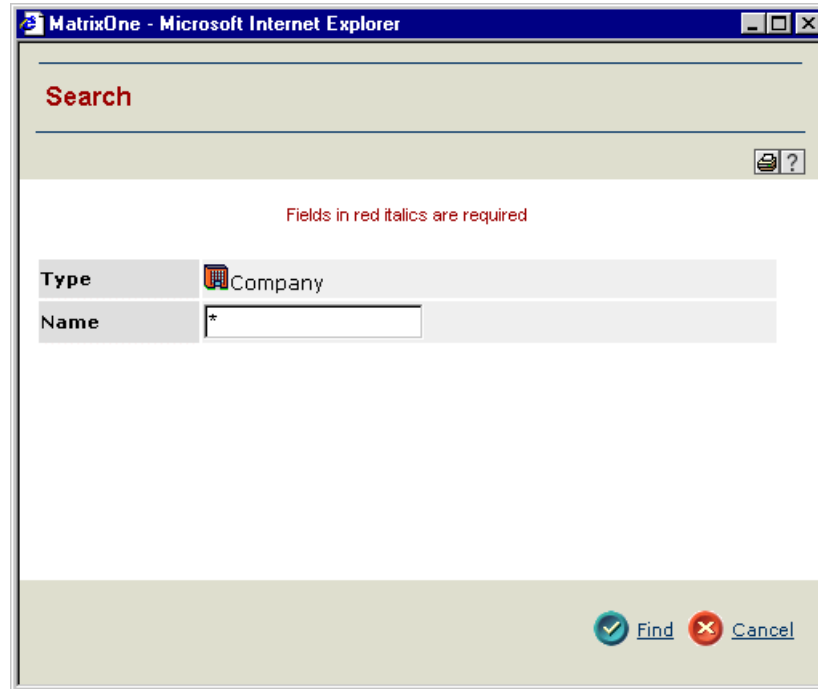
Finding and Selecting Roles

Finding and Selecting Groups

Using Search

To search for objects

1. Click  next to the item you are searching for.



The screenshot shows a web browser window titled "MatrixOne - Microsoft Internet Explorer". The page content includes a "Search" header, a note "Fields in red italics are required", and two search criteria fields: "Type" (set to "Company") and "Name" (set to "*"). "Find" and "Cancel" buttons are at the bottom right.

2. 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.

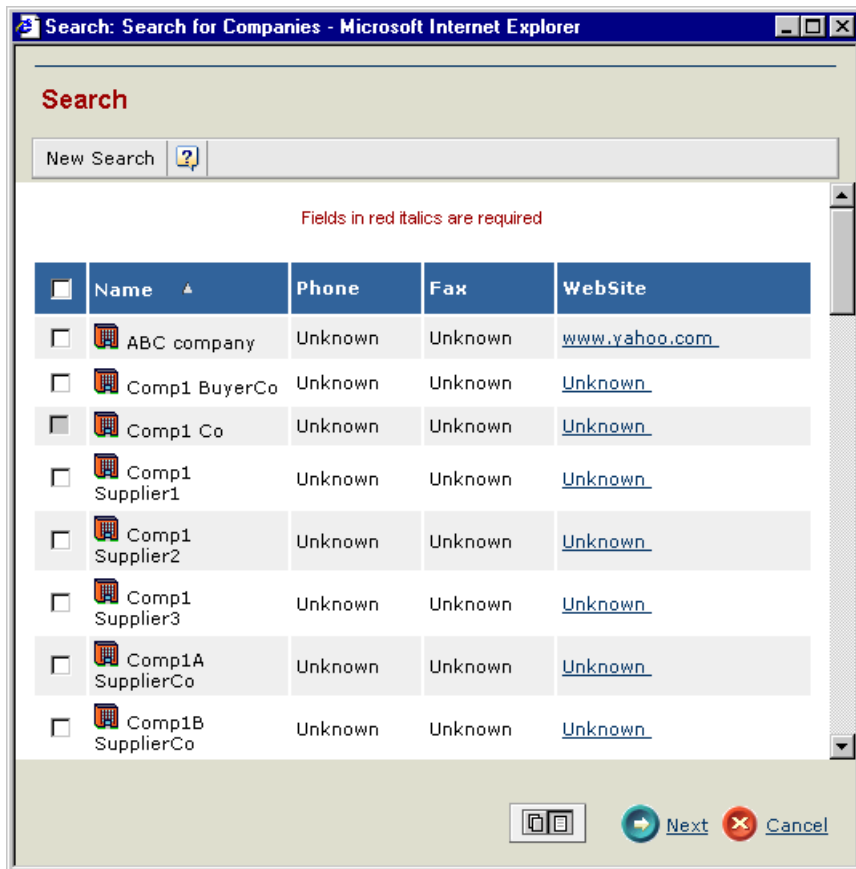
Type. The type is displayed.

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.

3. When you have finished entering search criteria, click **Find**.

To select search results

The search results are shown in 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.



1. Use the check boxes in the first column to select items to add.
2. Work within the search results page:
If the search results do not contain the item you want, click **New Search** from the page toolbar to change some or all of the previously-specified search criteria.
3. Click **Next**.
The Specify Share Types page appears.




4. For details about using this Specify Share Types page, see [Editing Share Types](#).
5. Click **Done**.

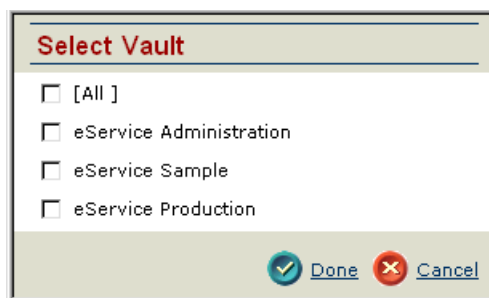
Selecting a Vault

Vault selection is available from many pages in Common Components. For example, some of the search dialogs allow you to choose which vault(s) to search. You can also select the vault where newly created objects are stored. If your Business Administrator has elected to have the Vault Awareness property set to false (the default), the choices for vaults are expanded to include not only your own company vault, but also your company's collaboration partners' vaults. 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.

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. For example, if you are searching for objects, you may want to search multiple vaults. Click one or more check boxes to select the vault(s).
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 Common Components 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 people

1. Click  next to the field on a form page that requires that you select a user.

Or

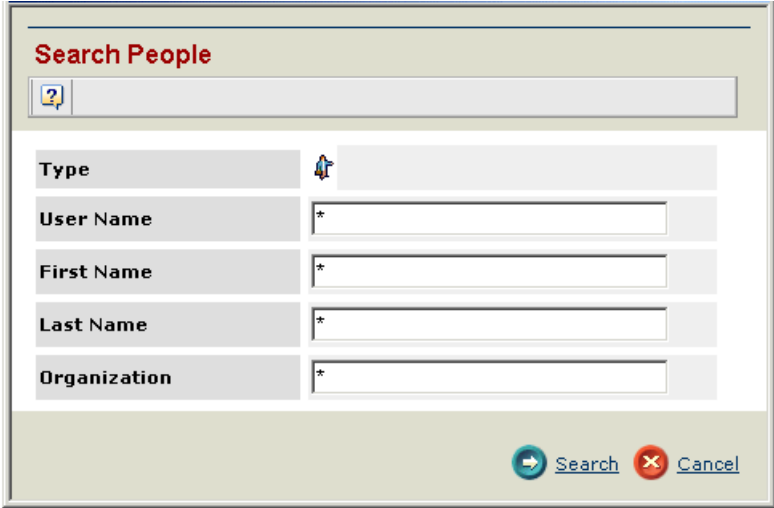
Click **Add People** from the page Actions menu.

Or

Click **Tools > Administration > Search for People**.

The Search page appears.

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 Search People search criteria includes some or all of the following fields, depending on the page from which you accessed the search function:

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).

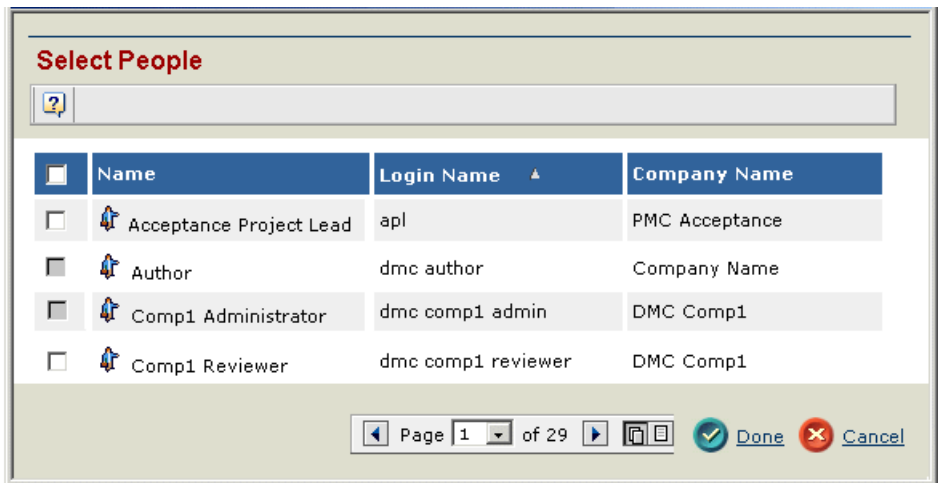
Organization. Type an Organization name or part of a name (using wildcards). This can be a company, subsidiary, business unit, or department. The search results will include employees of the organization, but not persons who only have role access to the organization.

2. 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 your search was initiated from.

To select people

1. Click the checkbox to the left of the person you want to select.



2. Click **Done**.

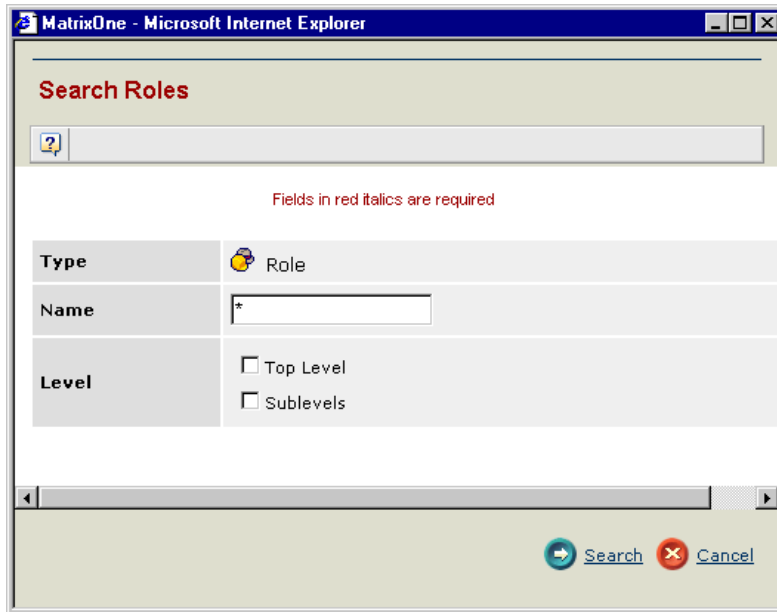
Finding and Selecting Roles

Some pages within the Common Components allow you to select users by role.

To find roles

1. Click **Add Role** from the page Actions menu.

The Search Roles page appears.



The Search Roles search criteria includes some or all of the following fields, depending on the page from which you accessed the search function:

Name. If you know the name of the Role, type the name or part of a name (using wildcards).

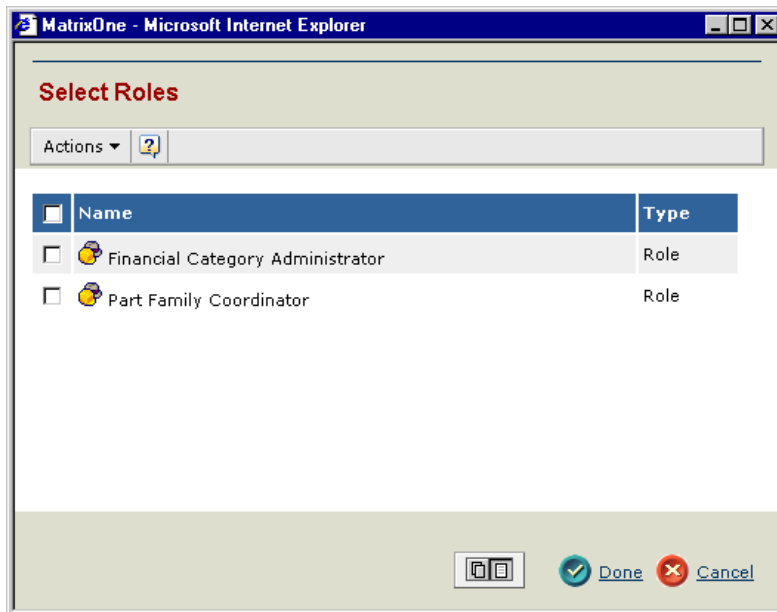
Level. Check whether you want to search for only Top Level or SubLevel roles.

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

The Select Roles page appears, listing the roles that match your search criteria.

To select roles

1. Click the button to the left of the role to select it.



2. Click **Done**.

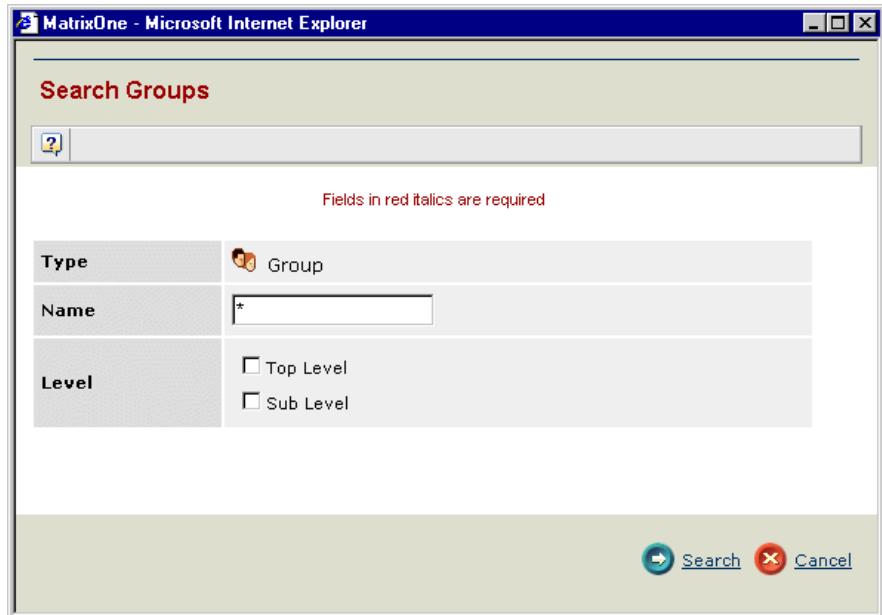
Finding and Selecting Groups

Some pages within the Common Components allow you to select users by group.

To find groups

1. Click **Add Group** from the page Actions menu.

The Search Groups page appears.



The screenshot shows a web browser window titled "MatrixOne - Microsoft Internet Explorer". The page content is titled "Search Groups" in red. Below the title is a search input field with a question mark icon on the left. A red message states "Fields in red italics are required". The form contains three sections: "Type" with a dropdown menu showing "Group"; "Name" with a text input field containing an asterisk (*); and "Level" with two checkboxes: "Top Level" and "Sub Level". At the bottom right, there are "Search" and "Cancel" buttons.

The Search Groups search criteria includes some or all of the following fields, depending on the page from which you accessed the search function:

Name. If you know the name of the Group, type the name or part of a name (using wildcards).

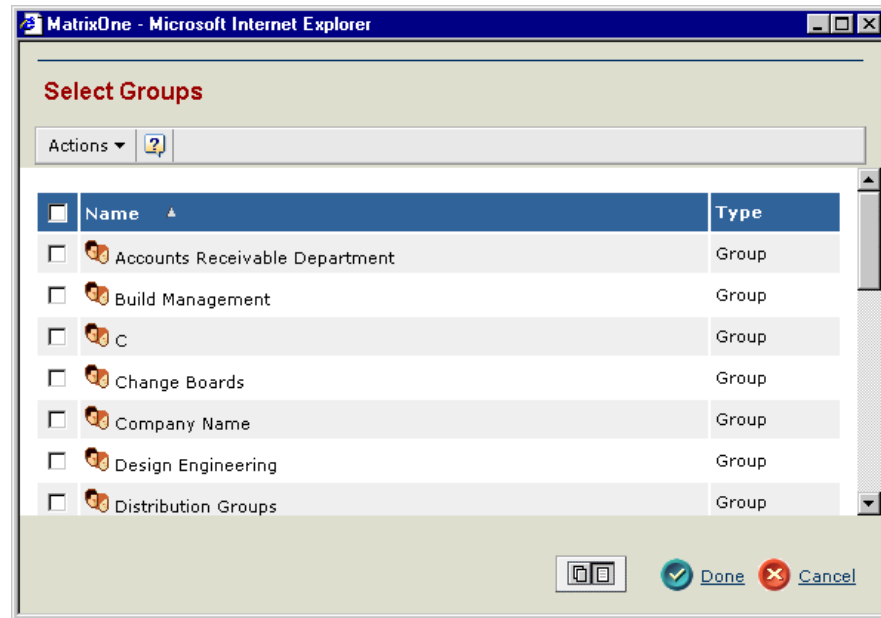
Level. Check whether you want to search for only Top Level or SubLevel groups.

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

The Select Groups page appears, listing the roles that match your search criteria.

To select groups

1. Click the button to the left of the group to select it.



2. Click **Done**.

Profile Management

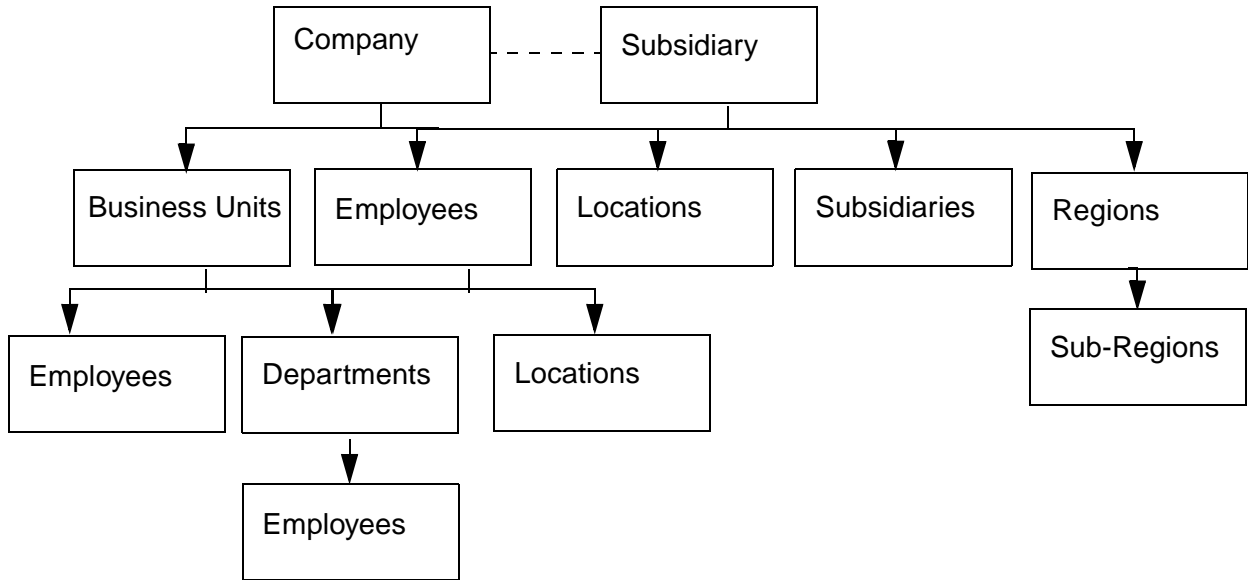
Profile Management Overview

Administration features allow Organization Managers to maintain all aspects of profile administration, including adding and editing organizations, locations, and people. Person definitions include login names and passwords, group and role assignments, and individual contact information. Organization definitions include identifying numbers, Internet addresses, and location information.

There are four types of organizations:

- company
- subsidiary
- business unit
- department

The term *company*, sometimes called parent company, refers to a top-level corporate entity. A *subsidiary* is a division of a company. A *business unit* is an operating unit of a company or of a subsidiary. A *location* is a physical site where an organization does business. For example, a location may be a headquarters, manufacturing plant, shipping address, etc. As the below diagram shows, all organization types can have employees and locations. A company or subsidiary can also have many business units and subsidiaries. Every location for a business unit also belongs to the company. Business units can be further divided into *departments*.



Every registered employee must be associated with a company and may be associated with a subsidiary, business unit, and/or department within the company.

A location must be associated with a company or a business unit. Similarly a region can be associated with a company or a business unit and sub regions can only be associated with a region. But a sub business unit can only be associated with a business unit and business units can be associated with a company or a region.

An organization can have several users defined in the role of Organization Manager. Each Organization Manager has access to information for his/her own organization and all subordinate organizations. For example, a company, XYZ Corp may have 2 business units, W Corp and V Corp. The Organization Manager for XYZ Corp can add and modify information for both W Corp and V Corp. The Organization Manager for V Corp can add and modify information only for V Corp.

If a business unit has no Organization Manager assigned to it, then all notifications that would normally go to the Organization Manager for the business unit are sent to Organization Manager of the parent company.

Common Profile Scope

Most Common Profile objects are available to all MatrixOne applications. However, there are some Common Profile objects that are specific to one or more MatrixOne applications. Links for these objects will appear only if their associated MatrixOne applications are installed.

The table below lists MatrixOne Common Profile objects along with their availability to the MatrixOne applications.

Common Profile Object	MatrixOne Application(s)
Business Units	All
Capabilities	All
Companies	All

Common Profile Object	MatrixOne Application(s)
Certifications	Supplier Central
Collaboration Partners	Team Central, Engineering Central
Currency Exchange Rates	Sourcing Central
Departments	All
Development Managers	Supplier Central
Directed By	Supplier Central
Formats	All
History	All
Lifecycle	All
Location	All
Part Quality Plans	Supplier Central
Parts	Supplier Central
People	All
Plant Scorecards	Supplier Central
Purchase Classes	Supplier Central
Regions	All
Specification Office	Specification Central
Subsidiaries	All
Supplier Development Plans	Supplier Central
Supplier Scorecards	Supplier Central

Creating a Company, Subsidiary, Business Unit, or Department

Organization Managers have the responsibility for adding companies, subsidiaries, business units, and departments (collectively known as *organizations*) to the database. For whichever organization, the information you enter is almost identical. If details need to be modified, you can select Edit Details from the Actions menu on the Properties page to make changes.

To create a new company, subsidiary, or business unit, or department

1. Click **Tools > Administration > Companies**. (Only users defined in the role of Organization Manager will see this link on the Tools menu.)
2. Access the Create page using one of the following methods:
 - If you are creating a new company:
 - Select **Create New** from the page Actions menu.
 - If you are creating a new business unit, subsidiary, or department:
 - a) Click a company name to access the Properties page and category list for the parent company that you want to create a business unit, subsidiary, or department for. See [Viewing Information for a Company](#).
 - b) From the category list of the parent company, click **Business Units, Subsidiaries, or Departments**.
 - c) Click **Create New** from the page Actions menu.

The following shows the Create New Company page. The information contained in the Create Subsidiary, Create Business Unit, and Create Department pages is very similar; differences are noted in the description for Create New Company.

Create New Company

Fields in red italics are required

Image	<input type="text"/>	Browse...
<i>Name</i>	<input type="text"/>	
Parent Company	<input type="text"/>	... Clear
<i>Company ID</i>	<input type="text"/>	
Cage Code	<input type="text"/>	
DUNS Number	<input type="text"/>	
Phone Number	<input type="text"/>	
Fax Number	<input type="text"/>	
Web Site	<input type="text"/>	
File Store	STORE	▼
FTP Host	<input type="text"/>	
FTP Directory	<input type="text"/>	
<i>Meeting Site Name</i>	<input type="text"/>	
<i>Meeting Site ID</i>	<input type="text"/>	
State		▼

Done Cancel

3. Enter details about the organization, including the following:

Image. The image for the organization. Clicking **Browse** allows you to select the image.

Name. The name of the organization as you want it to appear on the pages of the MatrixOne application. Type any alphanumeric characters (numbers, letters, or allowed symbols). Entry is required.

Parent Company. The name of the parent company. Clicking the ellipse button allows you to select the parent company. This attribute pertains only to a Company or Subsidiary. See [Using Search](#).

ID. Type any alphanumeric characters (numbers, letters, or allowed symbols) to identify the Company, Subsidiary, Business Unit, or Department.

Cage Code. An ID issued by the federal government. Type complete Cage Code (must be a whole number).

DUNS Number. An ID issued by Dunn & Bradstreet (must be a whole number).

Phone Number. Main phone number or phone number of primary contact. Type the complete phone number with area code (numbers, letters, or allowed symbols). Include the country code if outside US.

Fax Number. Main fax number or fax number of primary contact. Type the complete phone number with area code (numbers, letters, or allowed symbols). Include the country code if outside US.

Web Site. Address (URL) of Web site. Do not include http://.

File Store. If you want to use a store other than the default, select a different store from the drop-down list to specify where files for the organization will be stored in the database. (This attribute pertains to a Company only, and not to a Business Unit or Department.)

FTP Host. The server name for the organization's FTP site.

FTP Directory. The directory for the FTP site.


Meeting Site Name. The URL for the organization's Web meetings, including the "http://" prefix, as provided by the Web meeting supplier. A meeting site name and ID is required in order for employees to schedule and host meetings.

Meeting Site ID. The site ID that enables the organization to host Web meetings, as provided by the Web meeting supplier.

State. The state of the organization. Values are Active or Inactive.

Description. Additional information that describes the organization. Type any alphanumeric characters (numbers, letters, or allowed symbols).

Primary Vault. The primary vault for a Company or Subsidiary. For a Business Unit or Department, this attribute is named Vault.

Secondary Vault. This field pertains only to a Company or Subsidiary. If you want to use a vault other than the default, click  to specify where the organization object will be stored in the database. This field is displayed only if more than one vault is available. See [Selecting a Vault](#).

4. When you have filled in all necessary fields, click **Done** to add the new company, subsidiary, business unit, or department to the database.

Maintaining Company Information

Company information can be accessed from the Tools menu by users defined in the role of Organization Manager. Only users in this role will see the Administration option on the Tools menu.

The following topics are covered:

[Viewing a List of Companies](#)

[Viewing Information for a Company](#)

[Editing Details about a Company](#)

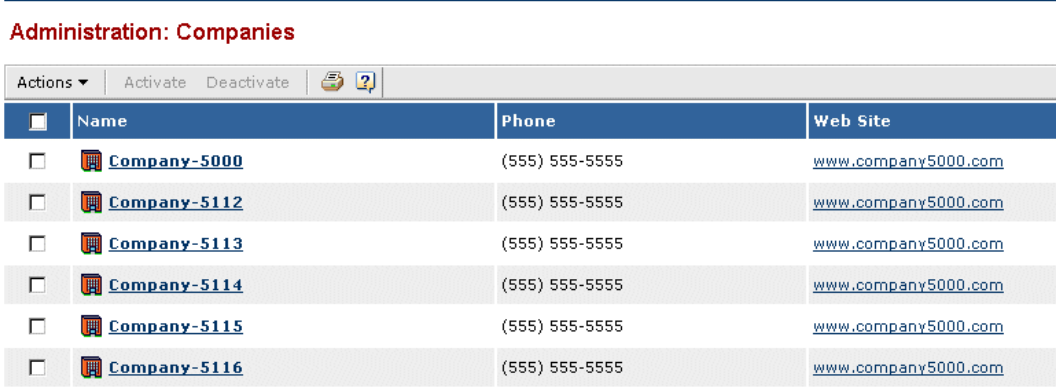
Viewing a List of Companies

The Administration: Companies page shows a table containing basic information about companies that are included in the database. This page provides access to specific company details and links to company locations and people.







To view a list of companies


1. Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)

The Administration: Companies page opens. It contains the following columns:



Administration: Companies

<input type="checkbox"/>	Name	Phone	Web Site
<input type="checkbox"/>	 Company-5000	(555) 555-5555	www.company5000.com
<input type="checkbox"/>	 Company-5112	(555) 555-5555	www.company5000.com
<input type="checkbox"/>	 Company-5113	(555) 555-5555	www.company5000.com
<input type="checkbox"/>	 Company-5114	(555) 555-5555	www.company5000.com
<input type="checkbox"/>	 Company-5115	(555) 555-5555	www.company5000.com
<input type="checkbox"/>	 Company-5116	(555) 555-5555	www.company5000.com

Company. Click on any highlighted link in the Company column to view the Properties page for that object, or click  at the end of the row to view the Properties page in a new browser window.

Phone. The main company phone number, as included in the company definition.

Web Site. The URL of the company's Web site, as included in the company definition.

2. To add a Company to the database, click the Actions menu and select **Create New Company**. See [Creating a Company, Subsidiary, Business Unit, or Department](#).
3. To view information about your company, click the company Name. See [Viewing Information for a Company](#).
4. To delete companies from the database, click the check box for each company you want to delete and then click the Actions menu and select **Delete**. To select all companies in the list, click the check box in the column heading.

A message is displayed, asking you to confirm that you want to delete the item(s) from the database. Click **Yes** to confirm the deletion or click **No** if you want the item(s) to remain in the database.


Viewing Information for a Company

The Company Properties page shows details about the company and provides access to company locations and people.

To view information for a company

1. Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)

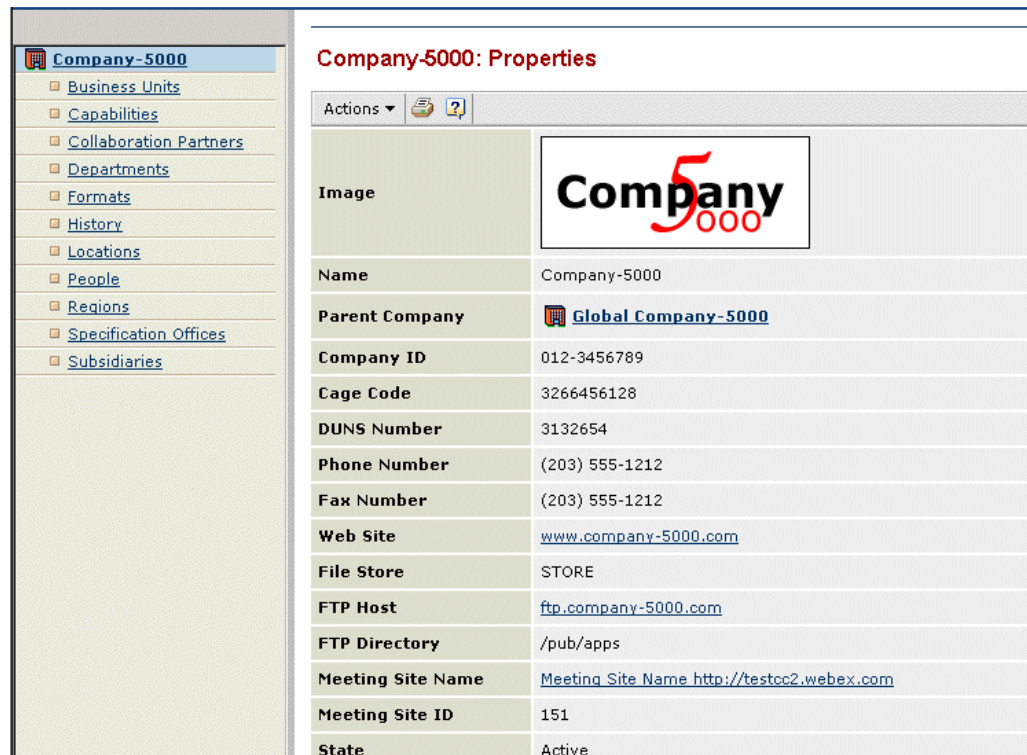
The Administration: Companies page opens.





2. From the list of companies, click the highlighted link in the Name column of the company you want to view, or click  at the end of the row to view the Properties page in a new browser window.

Or

To view information about your own company, click **Tools > Administration > View My Company**.

The category list for the company opens in the left frame and the Properties page opens in the right frame, showing details about the company. All fields are read-only.



Company-5000: Properties	
Actions	 
Image	
Name	Company-5000
Parent Company	 Global Company-5000
Company ID	012-3456789
Cage Code	3266456128
DUNS Number	3132654
Phone Number	(203) 555-1212
Fax Number	(203) 555-1212
Web Site	www.company-5000.com
File Store	STORE
FTP Host	ftp.company-5000.com
FTP Directory	/pub/apps
Meeting Site Name	Meeting Site Name http://testcc2.webex.com
Meeting Site ID	151
State	Active

The Company Properties page contains details entered when the company was created or modified. For details on specific fields, see [Creating a Company, Subsidiary, Business Unit, or Department](#).

3. To edit the properties listed, click **Edit Details** from the page Actions menu. See [Editing Details About a Company](#).

4. Use the category list to view additional information about the company:

Category	Description	For details, see:
Business Units	Lists the business units added for the company and lets you add and edit them.	Viewing a List of Business Units
Capabilities	Lists capabilities for a company or subsidiary.	Viewing a List of Capabilities
Collaboration Partners	Shows a list of companies that are defined as collaboration partners for the context company.	Viewing a List of Collaboration Partners
Departments	Shows the departments for the company.	Viewing a List of Departments
Formats	Shows the formats available to a company or subsidiary.	Viewing a List of Formats
History	Shows a log of events that have occurred for the company.	See the <i>AEF User Guide</i> .
Locations	Shows location details for the company.	Viewing a List of Locations
People	Provides access to definitions of people who work for the company.	Viewing People in a Company
Regions	Shows the regions. Only for Spec Central	Viewing a List of Regions
Specification Offices	Shows the specification offices. Only for Spec Central.	Viewing a List of Specification Offices
Subsidiaries	Lists the subsidiaries added for the company and lets you add and edit them.	Viewing a List of Subsidiaries

Editing Details about a Company

Users assigned to the role of Organization Manager can edit information about their own company. Only Organization Managers for the host company can edit information about other companies.

To edit details about a company

1. Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)
The Administration: Companies page opens.
2. Click the **Name** of the company you want to edit. The category list and Properties page open for the selected company.
3. From the Properties page, click **Edit Details** from the page Actions menu.

Dialog - Microsoft Internet Explorer

Edit Company Details

Fields in red italics are required

Image	<input type="text"/> Browse...
<i>Name</i>	Company-5000
Parent Company	Global Company-5000 ... Clear
<i>Company ID</i>	012-3456789
Cage Code	3266456128
DUNS Number	3132654
Phone Number	(203) 555-1212
Fax Number	(203) 555-1212
Web Site	www.company-5000.com
File Store	STORE ▾
FTP Host	ftp.company-5000.com
FTP Directory	/pub/apps
<i>Meeting Site Name</i>	Meeting Site Name http

Done Cancel

4. Use the Edit Company Details page to make changes. For details on specific fields, see [Creating a Company, Subsidiary, Business Unit, or Department](#).
5. When you have modified all necessary fields, click **Done**.


Viewing a List of Inactive Companies

The Administration: Inactive Companies page shows a table containing basic information about inactive companies. From this page you can view company details and activate a company.

To view a list of companies

1. Click **Tools > Administration > Inactive Companies** to view a list of inactive companies.

The Administration: Inactive Companies page opens. It contains the following columns:

Company. Click on any highlighted link in the Company column to view the Properties page for that object, or click  at the end of the row to view the Properties page in a new browser window.

Phone. The main company phone number, as included in the company definition.

Web Site. The URL of the company's Web site, as included in the company definition.

2. To view information about your company, click the company Name. See [Viewing Information for a Company](#).
3. To activate a company, click the check box for each company you want to activate and then click the Actions menu and select **Activate**. To select all companies in the list, click the check box in the column heading.
4. To delete companies from the database, click the check box for each company you want to delete and then click the Actions menu and select **Delete**. To select all companies in the list, click the check box in the column heading.

A message is displayed, asking you to confirm that you want to delete the item(s) from the database. Click **Yes** to confirm the deletion or click **No** if you want the item(s) to remain in the database.

Maintaining Subsidiary Information

A subsidiary is a division that is owned by a parent company. Each subsidiary can have several business units, locations, and other subsidiaries within the corporate structure.

Organization Managers for the parent company can add, edit, and remove subsidiaries.

The following topics are covered:

[Viewing a List of Subsidiaries](#)

[Viewing Information for a Subsidiary](#)

[Editing Details About a Subsidiary](#)

Viewing a List of Subsidiaries

The Subsidiaries page shows a table containing basic information about subsidiaries that are included in the database. This page provides access to specific subsidiary details.

To view a list of subsidiaries

1. Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)

The Administration: Companies page opens.










2. Select the parent company that you want to view subsidiaries for.

The company category list and Properties page opens.


3. From the company category list, click **Subsidiaries**.

The Subsidiaries page opens.

Company-5000: Subsidiaries

Actions ▾   				
<input type="checkbox"/>	Name	Phone	Fax	Web Site
<input type="checkbox"/>	 Subsidiary-5000	(555) 555-5555	(555) 555-5557	www.Subsidiary5000.com
<input type="checkbox"/>	 Subsidiary-5112	(555) 555-5555	(555) 555-5557	www.Subsidiary5000.com
<input type="checkbox"/>	 Subsidiary-5113	(555) 555-5555	(555) 555-5557	www.Subsidiary5000.com
<input type="checkbox"/>	 Subsidiary-5114	(555) 555-5555	(555) 555-5557	www.Subsidiary5000.com
<input type="checkbox"/>	 Subsidiary-5115	(555) 555-5555	(555) 555-5557	www.Subsidiary5000.com
<input type="checkbox"/>	 Subsidiary-5116	(555) 555-5555	(555) 555-5557	www.Subsidiary5000.com

It contains the following columns:

Name. Click on any highlighted link in the Name column to view the Properties page for that object, or click  at the end of the row to view the Properties page in a new browser window.

Phone. The main subsidiary phone number, as included in the subsidiary definition.

Fax. Main fax number or fax number of primary contact.

Web Site. The URL of the subsidiary's Web site.

4. To add a subsidiary to the database, click **Create New** from the page Actions menu. See *Creating a Company, Subsidiary, Business Unit, or Department*.
5. To delete subsidiaries from the database, click the check box for each subsidiary you want to delete and click **Delete Selected** from the page Actions menu. To select all subsidiaries in the list, click the check box in the column heading.
A message is displayed, asking you to confirm that you want to delete the item(s) from the database. Click **Yes** to confirm the deletion or click **No** if you want the item(s) to remain in the database.

Viewing Information for a Subsidiary

The Subsidiary Properties page shows details about the subsidiary and provides access to other subsidiaries, business units, locations, and people defined for the subsidiary.

To view information for a subsidiary


1. Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)

The Administration: Companies page opens.

2. Select the parent company that you want to view subsidiary information for.

The company category list and Properties page opens.

3. From the company category list, click **Subsidiaries**.

4. From the list of subsidiaries, click the highlighted link in the Name column of the subsidiary you want to view, or click  at the end of the row to view the Properties page in a new browser window.

(Subsidiaries can also have subsidiaries connected to them. If you want to view information about a subsidiary of a subsidiary, you need to click **Subsidiaries** from the subsidiaries category list.)

The category list for the subsidiary opens in the left frame and the Properties page opens in the right frame, showing details about the subsidiary. All fields are read-only.

Subsidiary-5000: Properties

Actions ▾

Image

Name Subsidiary-5000

Parent Company Global Company-5000

Subsidiary ID 012-3456789

Cage Code 3266456128

DUNS Number 3132654

Phone Number (203) 555-1212

Fax Number (203) 555-1212

Web Site www.Subsidiary-5000.com

File Store STORE

FTP Host [ftp.Subsidiary-5000.com](ftp://ftp.Subsidiary-5000.com)

FTP Directory /pub/apps

Meeting Site Name [Meeting Site Name http://testcc2.webex.com](http://testcc2.webex.com)

Meeting Site ID 151

State Active

The Subsidiary Properties page contains details entered when the subsidiary was created or modified. For details on specific fields, see [Creating a Company, Subsidiary, Business Unit, or Department](#).

5. To edit the properties listed, click **Edit Details** from the page Actions menu. See [Editing Details About a Subsidiary](#).
6. Use the category list to view additional information about the subsidiary:

Category	Description	For details, see:
Business Units	Lists the business units added for the company and lets you add and edit them.	Viewing a List of Business Units
Capabilities	Lists capabilities for a company or subsidiary.	Viewing a List of Capabilities
Collaboration Partners	Shows a list of companies that are defined as collaboration partners for the context company.	Viewing a List of Collaboration Partners
Departments	Shows the departments for the company.	Viewing a List of Departments
Formats	Shows the formats available to a company or subsidiary.	Viewing a List of Formats
History	Shows a log of events that have occurred for the company.	See the <i>AEF User Guide</i> .
Locations	Shows location details for the company.	Viewing a List of Locations
People	Provides access to definitions of people who work for the company.	Viewing People in a Company
Regions	Shows the regions. Only for Spec Central	Viewing a List of Regions

Category	Description	For details, see:
Specification Offices	Shows the specification offices. Only for Spec Central.	Viewing a List of Specification Offices
Subsidiaries	Lists the subsidiaries added for the company and lets you add and edit them.	Viewing a List of Subsidiaries

Editing Details About a Subsidiary

Users assigned to the role of Organization Manager can edit information about their subsidiary. Only Organization Managers for the host company can edit information about other subsidiaries.

To edit details about a subsidiary

1. Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)
The Administration: Companies page opens.
2. Click the **Name** of the parent company of the subsidiary. The category list and Properties page for the selected company opens.
3. From the Company category list, click **Subsidiary**.
4. Click the **Name** of the subsidiary you want to edit. The category list and Properties page for the selected subsidiary opens.
5. From the Properties page, click **Edit Details** from the page Actions menu.

Dialog - Microsoft Internet Explorer

Edit Subsidiary Details

Fields in red italics are required

Image	<input type="text"/> Browse...
<i>Name</i>	<input type="text" value="Subsidiary-5000"/>
Parent Company	<input type="text" value="Global Company-5000"/> Clear
<i>Subsidiary ID</i>	<input type="text" value="012-3456789"/>
Cage Code	<input type="text" value="3266456128"/>
DUNS Number	<input type="text" value="3132654"/>
Phone Number	<input type="text" value="(203) 555-1212"/>
Fax Number	<input type="text" value="(203) 555-1212"/>
Web Site	<input type="text" value="www.Subsidiary-5000.cc"/>
File Store	<input type="text" value="STORE"/>
FTP Host	<input type="text" value="ftp.Subsidiary-5000.com"/>
FTP Directory	<input type="text" value="/pub/apps"/>
<i>Meeting Site Name</i>	<input type="text" value="Meeting Site Name http"/>
<i>Meeting Site ID</i>	<input type="text" value="151"/>
State	Active

Done Cancel

Use the Edit Details page to make changes. For details on specific fields, see [Creating a Company, Subsidiary, Business Unit, or Department](#).

- When you have modified all necessary fields, click **Done**.

Maintaining Business Unit Information

A business unit is an operating unit that is owned by a parent company or a subsidiary. Each business unit can have several departments and locations within the corporate structure. Organization Managers for the parent company or subsidiary can add, edit, and remove business units.

The following topics are covered:

Viewing a List of Business Units

Viewing Information for a Business Unit

Editing Details About a Business Unit

Viewing a List of Business Units

The Business Units page shows a table containing basic information about business units that are included in the database. This page provides access to specific business unit details.

To view a list of business units

1. Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)

The Administration: Companies page opens.

2. Select the parent company that you want to view business units for.

The company category list and Properties page opens.


3. From the company category list, click **Business Units**.

(Subsidiaries can also have business units connected to them. If you want to view information about a business unit of a subsidiary, you need access the subsidiary under the company category list, then click **Business Units** from the subsidiary category list.)


The Business Units page opens.



Company-5000: Business Units

<input type="checkbox"/>	Name	Phone	Fax	Web Site
<input type="checkbox"/>	 BusinessUnit-5000	(555) 555-1212	(555) 555-1212	www.company5000.com
<input type="checkbox"/>	 BusinessUnit-5001	(555) 555-1212	(555) 555-1212	www.company5000.com
<input type="checkbox"/>	 BusinessUnit-5002	(555) 555-1212	(555) 555-1212	www.company5000.com

It contains the following columns:

Name. Click on any highlighted link in the Name column to view the Properties page for that object, or click  at the end of the row to view the Properties page in a new browser window.

Phone. The main business unit phone number, as included in the business unit definition.

Fax. Main fax number or fax number of primary contact.

Web Site. The URL of the business unit's Web site.

4. To add a business unit to the database, click **Create New** from the page Actions menu. See *Creating a Company, Subsidiary, Business Unit, or Department*.
5. To delete business units from the database, click the check box for each business unit you want to delete, click **Delete Selected** from the page Actions menu. To select all business units in the list, click the check box in the column heading.

A message is displayed, asking you to confirm that you want to delete the item(s) from the database. Click **Yes** to confirm the deletion or click **No** if you want the item(s) to remain in the database.

Viewing Information for a Business Unit

The Business Unit Properties page shows a table containing details about the business unit. This page provides access to modify business unit details and links to locations, people, and departments defined for the business unit.

To view information for a business unit

1. Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)


The Administration: Companies page opens.

2. Select the parent company that you want to view business unit information for.

The company category list and Properties page opens.

3. From the company category list, click **Business Units**.

(Subsidiaries can also have business units connected to them. If you want to view information about a business unit of a subsidiary, you need access the subsidiary under the company category list, then click **Business Units** from the subsidiary category list.)

4. From the list of business units, click the highlighted link in the Name column of the business unit you want to view, or click  at the end of the row to view the Properties page in a new browser window.

The category list for the business unit opens in the left frame and the Properties page opens in the right frame, showing details about the business unit. All fields are read-only.

Company-5000

- Business Units
 - BusinessUnit-5000**
 - Business Units
 - Departments
 - History
 - Locations
 - People
 - Route Templates
 - Capabilities
 - Collaboration Partners
 - Departments
 - Formats
 - History
 - Locations
 - People
 - Regions
 - Specification Offices
 - Subsidiaries

BusinessUnit-5000: Properties

Actions ▾

Image

Name	BusinessUnit-5000
ID	012-3456789
Cage Code	3266456128
DUNS Number	3132654
Phone Number	(203) 555-1212
Fax Number	(203) 555-1212
Web Site	www.businessUnit-5000.com
FTP Host	ftp.businessUnit-5000.com
FTP Directory	/pub/apps
Meeting Site Name	Meeting Site Name http://testcc2.webex.com
Meeting Site ID	151
State	Active
Description	Description of this Business Unit.
Vault	eServiceProduction

The Business Unit Properties page contains details entered when the business unit was created or modified. For details on specific fields, see [Creating a Company, Subsidiary, Business Unit, or Department](#).

5. To edit the properties listed, click **Edit Details** from the page Actions menu. See [Editing Details About a Business Unit](#).
6. Use the category list to view additional information about the business unit:

Category	Description	For details, see:
Business Units	Shows a list of business units for the business unit.	Viewing a List of Business Units
Departments	Shows a list of departments for the business unit.	Viewing a List of Departments
History	Shows a log of events that have occurred for the business unit.	See the <i>AEF User Guide</i> .
Locations	Shows location details for the business unit.	Viewing a List of Locations
People	Provides access to definitions of people who work for the business unit.	Viewing People in a Company
Route Templates	Shows a list of route templates for the business unit.	Listing Route Templates

Editing Details About a Business Unit

Users assigned to the role of Organization Manager can edit information about their business unit. Only Organization Managers for the host company can edit information about other business units.

To edit details about a business unit

1. Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)
The Administration: Companies page opens.
2. Click the **Name** of the parent company of the business unit. The category list and Properties page for the selected company opens.
3. From the Company category list, click **Business Units**.
(Subsidiaries can also have business units connected to them. If you want to view information about a business unit of a subsidiary, you need access the subsidiary under the company category list, then click **Business Units** from the subsidiary category list.)
4. Click the **Name** of the business unit you want to edit. The category list and Properties page for the selected business unit opens.
5. From the Properties page, click **Edit Details** from the page Actions menu.

Dialog - Microsoft Internet Explorer

Edit Business Unit Details

Fields in red italics are required

Image	<input type="text"/>	Browse...
<i>Name</i>	BusinessUnit-5000	
ID	012-3456789	
Cage Code	3266456128	
DUNS Number	3132654	
Phone Number	(203) 555-1212	
Fax Number	(203) 555-1212	
Web Site	www.businessUnit-5000.	
FTP Host	ftp.businessUnit-5000.cc	
FTP Directory	/pub/apps	
Meeting Site Name	Meeting Site Name http	
Meeting Site ID	151	

Done Cancel

6. Use the Edit Business Unit Details page to make changes. For details on specific fields, see [Creating a Company, Subsidiary, Business Unit, or Department](#).
7. When you have modified all necessary fields, click **Done**.

Maintaining Department Information

A department is a sub unit of a business unit.

The following topics are covered:

Viewing a List of Departments

Viewing Information for a Department

Editing Details About a Department

Viewing a List of Departments

The Departments page shows a table containing basic information about departments that are included in the database. This page provides access to specific department details. To view departments, you must first access the business unit that the departments are defined for.

To view a list of departments

1. Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)

The Administration: Companies page opens.

2. Select the parent company that you want to view business units for.

The company category list and Properties page opens.

3. From the company category list, click **Business Units**.

The Business Units page opens.

(Subsidiaries can also have business units connected to them. If you want to view information about a business unit of a subsidiary, you need access the subsidiary under the company category list, then click **Business Units** from the subsidiary category list.)









4. Click the name of the business unit that you want to view departments for.

The Business Unit category list and Properties page opens.


5. From the business unit category list, click **Departments**.

The Departments page opens.

Company-5000: Departments

Actions ▾   				
<input type="checkbox"/>	Name	Phone	Fax	Web Site
<input type="checkbox"/>	 Department-5000	(555) 555-5555	(555) 555-5557	www.department5000.com
<input type="checkbox"/>	 Department-5112	(555) 555-5555	(555) 555-5557	www.department5000.com
<input type="checkbox"/>	 Department-5113	(555) 555-5555	(555) 555-5557	www.department5000.com
<input type="checkbox"/>	 Department-5114	(555) 555-5555	(555) 555-5557	www.department5000.com
<input type="checkbox"/>	 Department-5115	(555) 555-5555	(555) 555-5557	www.department5000.com
<input type="checkbox"/>	 Department-5116	(555) 555-5555	(555) 555-5557	www.department5000.com

It contains the following columns:

Name. Click on any highlighted link in the Name column to view the Properties page for that object, or click  at the end of the row to view the Properties page in a new browser window.

Phone. The main department phone number, as included in the department definition.

Fax. Main fax number or fax number of primary contact.

Web Site. The URL of the department's Web site.

6. To add a department to the database, click **Create New** from the page Actions menu. See *Creating a Company, Subsidiary, Business Unit, or Department*.

7. To delete departments from the database, click the check box for each department you want to delete and click **Delete Selected** from the page Actions menu. To select all departments in the list, click the check box in the column heading.

A message is displayed, asking you to confirm that you want to delete the item(s) from the database. Click **Yes** to confirm the deletion or click **No** if you want the item(s) to remain in the database.

Viewing Information for a Department

The Department Properties page shows a table containing details about the department. This page provides access to modify department details and links to people defined for the department. To view department details, you must first access the business unit that the department is defined for.

To view information for a department

1. Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)

The Administration: Companies page opens.

2. Select the parent company that you want to view business units for.

The company category list and Properties page opens.

3. From the company category list, click **Business Units**.


The Business Units page opens.

(Subsidiaries can also have business units connected to them. If you want to view information about a business unit of a subsidiary, you need access the subsidiary under the company category list, then click **Business Units** from the subsidiary category list.)

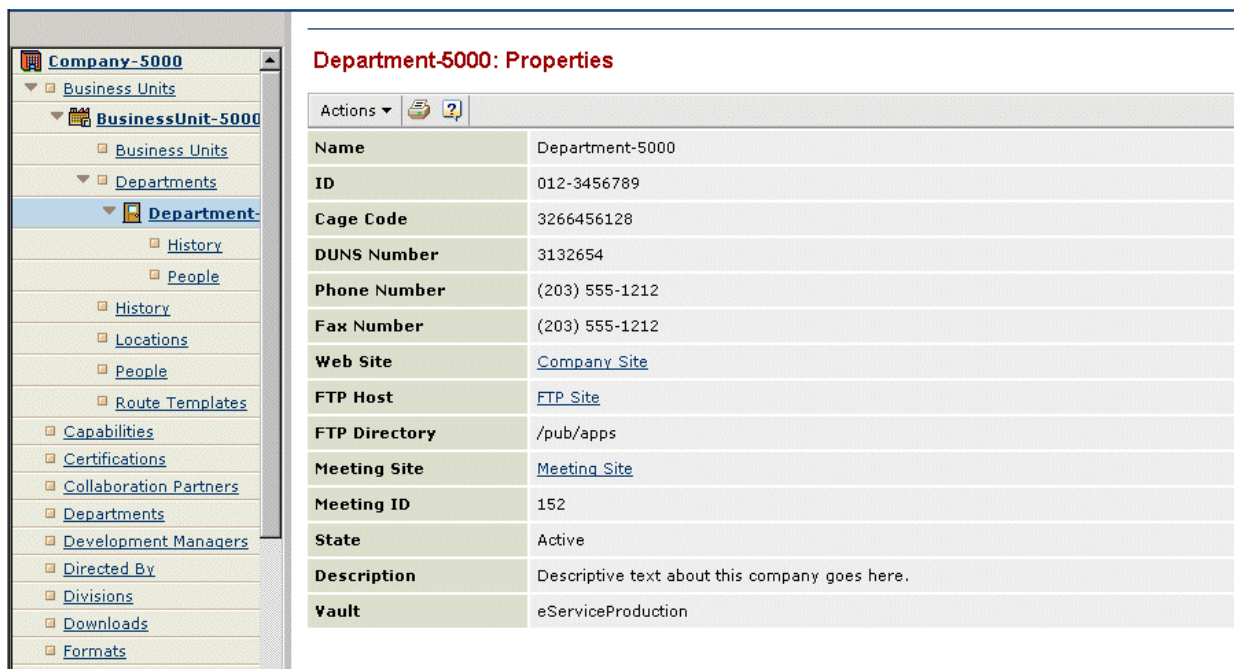
4. Click the name of the business unit that you want to view departments for.

The Business Unit category list and Properties page opens.

5. From the business unit category list, click **Departments**.

6. From the list of departments, click the highlighted link in the Name column of the department you want to view, or click  at the end of the row to view the Properties page in a new browser window.

The category list for the department opens in the left frame and the Properties page opens in the right frame, showing details about the department. All fields are read-only.



The Department Properties page contains details entered when the department was created or modified. For details on specific fields, see [Creating a Company, Subsidiary, Business Unit, or Department](#).

- To edit the properties listed, click **Edit Details** from the page Actions menu. See [Editing Details About a Department](#).
- Use the category list to view additional information about the department:


Category	Description	For details, see:
History	Shows a log of events that have occurred for the business unit.	See the <i>AEF User Guide</i> .
People	Provides access to definitions of people who work for the business unit.	Viewing People in a Company

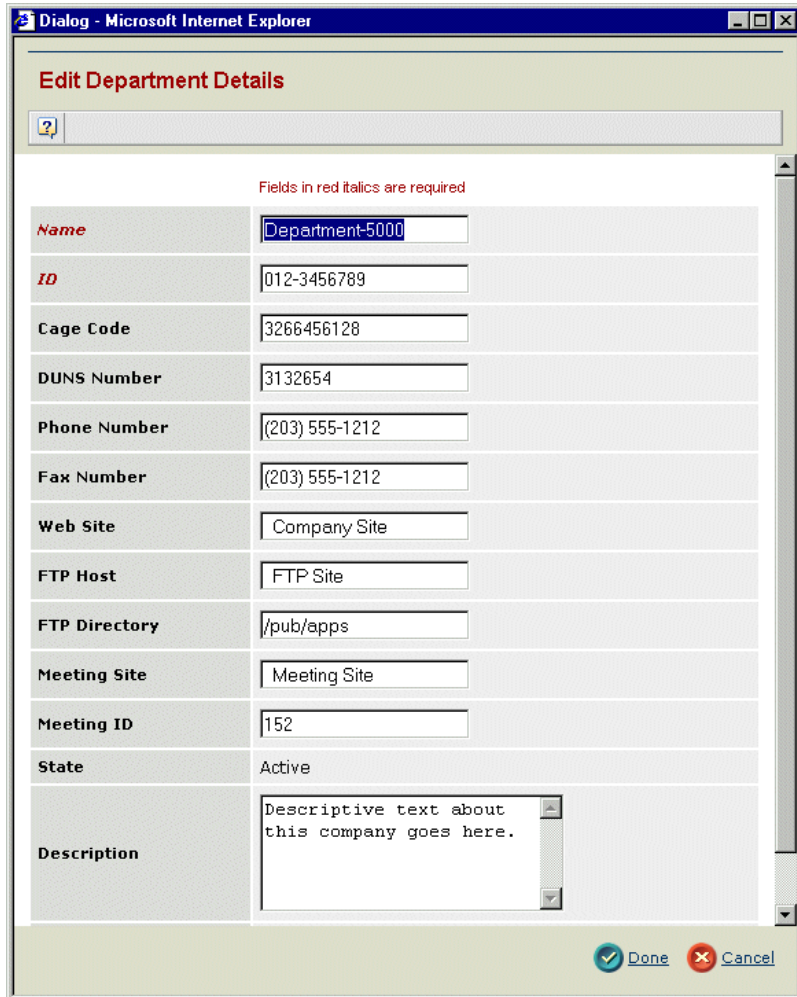
Editing Details About a Department

Users assigned to the role of Organization Manager can edit information about their department. Only Organization Managers for the parent company or business unit can edit information about other departments.

To edit details about a department

- Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)
The Administration: Companies page opens.
- Select the parent company that you want to view business units for.
The company category list and Properties page opens.
- From the company category list, click **Business Units**.
The Business Units page opens.

4. Click the name of the business unit that you want to view departments for.
The Business Unit category list and Properties page opens.
(Subsidiaries can also have business units connected to them. If you want to view information about a business unit of a subsidiary, you need access the subsidiary under the company category list, then click **Business Units** from the subsidiary category list.)
5. From the business unit category list, click **Departments**.
6. From the list of departments, click the highlighted link in the Name column of the department you want to view, or click  at the end of the row to view its Properties.
7. From the Properties page, click **Edit Details** from the page Actions menu.



Dialog - Microsoft Internet Explorer

Edit Department Details

Fields in red italics are required

<i>Name</i>	Department-5000
<i>ID</i>	012-3456789
<i>Cage Code</i>	3266456128
<i>DUNS Number</i>	3132654
<i>Phone Number</i>	(203) 555-1212
<i>Fax Number</i>	(203) 555-1212
<i>Web Site</i>	Company Site
<i>FTP Host</i>	FTP Site
<i>FTP Directory</i>	/pub/apps
<i>Meeting Site</i>	Meeting Site
<i>Meeting ID</i>	152
<i>State</i>	Active
<i>Description</i>	Descriptive text about this company goes here.

Done Cancel

8. Use the Edit Department Details page to make changes. For details on specific fields, see [Creating a Company, Subsidiary, Business Unit, or Department](#).
9. You can activate or deactivate the department by clicking the Active or Inactive **Status** button. If you change the status of a parent (business unit, company, or subsidiary) to inactive, you should also make the department inactive.
10. When you have modified all necessary fields, click **Done**.

Maintaining Location Information

A location is a physical address where an organization conducts business. There are four types of locations: Headquarters Site, Manufacturing Site, Billing Address, Shipping Address. Organization Managers can create locations for companies, subsidiaries, or business units.

The following topics are covered:

[Viewing a List of Locations](#)

[Creating a Location](#)

[Viewing Information for a Location](#)

Viewing a List of Locations

To view locations for an organization

1. From the category list for a Company, Subsidiary, Business Unit, or Department, click **Locations**.

Any locations already defined for the organization are listed. To see details about a location, click its Name.

Company-5000: Locations

<input type="checkbox"/>	Name	Type	City	State	Postal Code	Country
<input type="checkbox"/>	Belgium	Regional Office, Headquarters Site	Culliganlaan 1B		B-1831 Diegem	Belgium
<input type="checkbox"/>	Canada - East	Regional Office	Mississauga	ON	L4Z 3K3	Canada
<input type="checkbox"/>	Headquarters	Headquarters	Chelmsford	MA	12345	USA
<input type="checkbox"/>	Japan	Sales Office	Tokyo		102-0075	Japan

2. To add a location to the database, click **Create New** from the page Actions menu. See [Creating a Location](#).
3. To delete locations from the database, click the check box for each location you want to delete and click **Delete** from the page Actions menu. To select all locations in the list, click the check box in the column heading.

A message is displayed, asking you to confirm that you want to delete the item(s) from the database. Click **Yes** to confirm the deletion or click **No** if you want the item(s) to remain in the database.

Creating a Location

To add a new location

1. Access the category list and Properties page for the page type of organization you want to create a location for.
2. Click **Create New** from the page Actions menu.

Create Location

Fields in red italics are required

<i>Name</i>	<input type="text"/>
Company	ABC company
Location Type	<input type="checkbox"/> Headquarters Site <input type="checkbox"/> Manufacturing Site <input type="checkbox"/> Billing Address <input type="checkbox"/> Shipping Address
Address 1	<input type="text"/>
Address 2	<input type="text"/>
<i>City</i>	<input type="text"/>
State/Region	<input type="text"/>
Postal Code	<input type="text"/>
Country	<input type="text"/>

Done Cancel

3. Enter details about the company location, including the following:

Name. Name of the location.

If a location is entered with a duplicate name, the second location entered will appear as the Company Name - City. Therefore, if multiple locations exist with the same city, it is recommended to enter the Location name with a unique identifier.

Location Type. Check the boxes that represent the location type: Headquarters Site, Manufacturing Site, Billing Address, and Shipping Address. A small company might have just one location and all the types apply to it. A larger company might have many locations that are manufacturing sites, one headquarters site, one billing address, and several shipping addresses.

Address 1 and Address 2. Location address elements, generally any combination of street name, building number, suite number, or post office box number.

City. The city where the company is located, or the city to which company mail is delivered.

State/Region. Location state or region.

Zip Code. 5-digit or 9-digit zip code in the U.S., or any necessary postal code for international addresses.

Country. Name of the country where the company is located.

4. Click **Done**.

Viewing Information for a Location


The Location Properties page shows a table containing details about a location. This page provides access to modify location details. To view location details, you must first access the Company, Subsidiary, Business Unit, or Department that the location is defined for.

To view information for a location

1. Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)

The Administration: Companies page opens.

2. Select the location.
 - For a location for a Company, click **Locations** in the category list.
 - For a location for a Subsidiary, Business Unit, or Department, display the Properties page and then click **Locations** in the category list.

3. From the list of locations, click the highlighted link in the Name column of the location you want to view, or click  at the end of the row to view the Properties page in a new browser window.

The category list for the location opens in the left frame and the Properties page opens in the right frame, showing details about the location. All fields are read-only.



Location-5000: Properties

Actions   	
Name	Location-5000
Company	 Company-5000
Location Type	Headquarters
Status	Authorized
Address 1	234 Executive Way
Address 2	
City	Henderson
State/Region	Kentucky
Zip Code	55555-5555
Country	USA

The Location Properties page contains details entered when the department was created or modified. For details on specific fields, see [Creating a Location](#).

4. To edit the properties listed, select **Edit Details** from the page Actions menu. See [Editing Details About a Location](#).
5. Use the category list to view additional information about the location:


Category	Description	For details, see:
Certifications	Lists certifications for the location. For Supplier Central only.	<i>Supplier Central User Guide</i>
Part Quality Plans	Lists part quality plans for the location. For Supplier Central only.	<i>Supplier Central User Guide</i>

Category	Description	For details, see:
Purchase Classes	Lists purchase classes for the location. For Supplier Central only.	<i>Supplier Central User Guide</i>
Ship to Locations	Lists ship to locations for the location. For Supplier Central only.	<i>Supplier Central User Guide</i>

Editing Details About a Location

Users assigned to the role of Organization Manager can edit information about a location.


To edit details about a location



1. Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)
The Administration: Companies page opens.
2. Select the location.
 - For a location for a Company, click **Locations** in the category list.
 - For a location for a Subsidiary, Business Unit, or Department, display the Properties page and then click **Locations** in the category list.
3. From the list of locations, click the highlighted link in the Name column of the location you want to view, or click  at the end of the row to view its Properties.
4. From the Properties page, click **Edit Details** from the page Actions menu.

Dialog - Microsoft Internet Explorer

Edit Location Details

Fields in red italics are required

<i>Name</i>	Location-5000
Company	 Company-5000
Location Type	<input type="checkbox"/> Headquarters <input type="checkbox"/> Manufacturing Site <input type="checkbox"/> Billing Address <input type="checkbox"/> Shipping Address
Status	Authorized
Address 1	234 Executive Way
Address 2	
<i>City</i>	Henderson
State/Region	Kentucky
Zip Code	55555-5555
Country	USA

 Done  Cancel

5. Use the Edit Location Details page to make changes. For details on specific fields, see [Creating a Location](#).
6. When you have modified all necessary fields, click **Done**.

Maintaining Regions

A region is geographical area where an organization conducts business. Organization Managers can create regions for companies or subsidiaries.

The following topics are covered:

[Viewing a List of Regions](#)

[Creating a Region](#)

[Viewing Information for a Region](#)

[Editing Details About a Region](#)

[Working with Sub-regions](#)

Viewing a List of Regions







The Regions page shows a table containing basic information about regions that are defined for the selected company or subsidiary. The Sub-regions page shows the sub-regions defined for a region.

To view a list of regions

1. Open the Properties page for the company or subsidiary you want to view regions for.
2. From the category list, click **Regions**.

The Regions page opens.

Company-5000: Regions

Actions ▾   		
<input type="checkbox"/>	Name	Description
<input type="checkbox"/>	 North America	Description of region
<input type="checkbox"/>	 Asia Pacific	Description of region
<input type="checkbox"/>	 Europe	Description of region
<input type="checkbox"/>	 Australia	Description of region

3. To add a region to the database, click the Actions menu and select **Create New**. See [Creating a Region](#).
4. To delete regions from the database, click the check box for each region you want to delete and click **Delete** from the page Actions menu. To select all regions in the list, click the check box in the column heading.

A message is displayed, asking you to confirm that you want to delete the item(s) from the database. Click **Yes** to confirm the deletion or click **No** if you want the item(s) to remain in the database.

Creating a Region

To add a region

1. Access the category list and Properties page for the page type of organization you want to create a region for.

2. Click **Create New** from the page Actions menu.


The screenshot shows a web browser window titled "MatrixOne - Microsoft Internet Explorer". The main content area is titled "Create New Region". Below the title is a search bar with a question mark icon. A red message states "Fields in red italics are required". The form contains two fields: "Name" and "Description", both in red italics. At the bottom right are "Done" and "Cancel" buttons.

3. Enter details about the region, including the following:
Name. Name of region. Required.
Description. A description of the region.
4. Click **Done**.

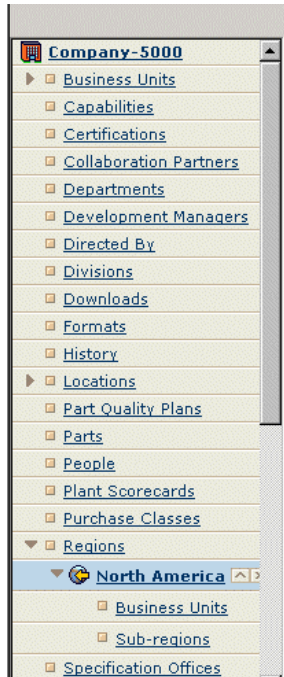
Viewing Information for a Region

The Region Properties page shows a table containing details about a region. This page provides access to modify region details. To view region details, you must first access the Company or Subsidiary that the region is defined for.

To view information for a region

1. Open the Properties page for the company or subsidiary you want to view regions for.
2. From the category list, click **Regions**.
3. From the list of regions, click the highlighted link in the Name column of the region you want to view, or click  at the end of the row to view the Properties page in a new browser window.

The category list for the region opens in the left frame and the Properties page opens in the right frame, showing details about the region. All fields are read-only.



North America: Properties

Actions ▼  	
Name	North America
Cage Code	3266456128
DUNS Number	3132654
Phone Number	(203) 555-1212
Fax Number	(203) 555-1212
Web Site	Company Site
FTP Host	FTP Site
FTP Directory	/pub/apps
Meeting Site	Meeting Site
Meeting ID	151
State	Active
Description	Descriptive text about this company goes here.

The Properties page for a region contains details about the region. For details on specific fields, see [Creating a Region](#).


- To edit the properties listed, click **Edit Details** from the page Actions menu. See [Editing Details About a Region](#).
- Use the category list to view additional information about the region:

Category	Description	For details, see:
Business Units	To list business units for the region.	Viewing a List of Business Units
Sub-regions	To list any sub-regions defined for the region.	Viewing a List of Regions

Editing Details About a Region

Users assigned to the role of Organization Manager can edit information about a region.

To edit details about a region

- Open the Properties page for the company or subsidiary you want to view regions for.
- From the category list, click **Regions**.
- From the list of regions, click the highlighted link in the Name column of the region you want to view, or click  at the end of the row to view its Properties.
- From the Properties page, click **Edit Details** from the page Actions menu.

Dialog - Microsoft Internet Explorer

Edit Region Details

Fields in red italics are required

<i>Name</i>	North America
<i>Company ID</i>	NA-012589
<i>Cage Code</i>	3266456128
<i>DUNS Number</i>	3132654
<i>Phone Number</i>	(203) 555-1212
<i>Fax Number</i>	(203) 555-1212
<i>Web Site</i>	Company Site
<i>FTP Host</i>	FTP Site
<i>FTP Directory</i>	/pub/apps
<i>Meeting Site</i>	Meeting Site
<i>Meeting ID</i>	151
<i>State</i>	Active
<i>Description</i>	Descriptive text about this company goes here.

Done Cancel

5. Use the Edit Region Details page to make changes. For details on specific fields, see [Creating a Region](#).
6. When you have modified all necessary fields, click **Done**.

Working with Sub-regions

A region can have one or more sub-regions defined for it. The category list for a region includes **Sub-regions**. A sub-region is defined just like a region.

To work with sub-regions, use the following procedures for regions:

[Viewing a List of Regions](#)

[Creating a Region](#)

[Viewing Information for a Region](#)

[Editing Details About a Region](#)

Creating People Definitions

The Organization Manager is responsible for adding company employees to the database. The definition of a person includes the person's login name and password, groups and roles to which the person is assigned, and other contact information about the individual.

Some fields for adding a person are available only to particular applications.

Adding a Person

To add a person

1. Select **Tools > Administration > View My Company > People**.
2. Click **Create New** from the page Actions menu.

Or



Click **Create New** from the Actions menu the People page for a specific company.

The screenshot shows a web browser window titled "MatrixOne - Microsoft Internet Explorer". The page content is titled "Step 1 of 2: Specify Details". Below the title is a search bar with a question mark icon. A red note states "Fields in red italics are required". The form consists of the following fields:

<i>User Name</i>	<input type="text"/>
<i>PassWord</i>	<input type="text"/>
<i>Confirm PassWord</i>	<input type="text"/>
State	<input type="text" value="Active"/>
<i>First Name</i>	<input type="text"/>
Middle Name	<input type="text"/>
<i>Last Name</i>	<input type="text"/>
<i>Company Name</i>	Company Name
Business Unit	<input type="text"/>
Location	<input type="text"/>
Company Representative	<input type="text" value="Not a Company Representative"/>
Office Phone	<input type="text"/>

At the bottom right of the form are "Next" and "Cancel" buttons.

3. Enter the **User Name** that the person will use to access the application(s). You can use whatever naming convention is standard for your company. For example, you may want to use the first letter of the person's first name followed by the last name (gashington) or the first name followed by a period and then the last name (george.washington). Usernames are case-sensitive.
4. Add password information:
 - Type the **Password** that the person will use to access the application(s). The password is case-sensitive.
 - Type the same password in the **Confirm Password** text box.
5. Add Name information:
 - Type the person's **First Name**.
 - Type the person's **Middle Name**.
 - Type the person's **Last Name**.
6. Add Business Unit and Location information:
 - Select a **Business Unit** from the drop-down list.
 - Select a **Location** from the drop-down list.
7. Specify the **Company Representative** status, if applicable.
8. Add phone information, including any of the following:
 - **Office Phone**
 - **Home Phone**
 - **Pager**
 - **Fax**
9. Add network access information:
 - Add the person's **Email Address**. This address appears on the People page and provides a direct link from that page to create a new email message for the person.
 - For system-generated e-mails, specify the language in **System Generated Mail Preference**.
 - Add the URL for the person's **Web Site**, if one exists.
10. Check whether the person's **Login Type** is Standard or Secure ID.
11. Check whether or not the person can **Host Meetings**.
12. Type the person's **Meeting Username**.
13. Add address information, including any of the following:
 - **City**
 - **State/Region**
 - **Postal Code**
 - **Country**
14. Add absentee information, including any of the following:
 - Click the calendar button and select the **Absence Start Date**.
 - Click the calendar button and select the **Absence End Date**. Required if the Absence Start Date is specified.

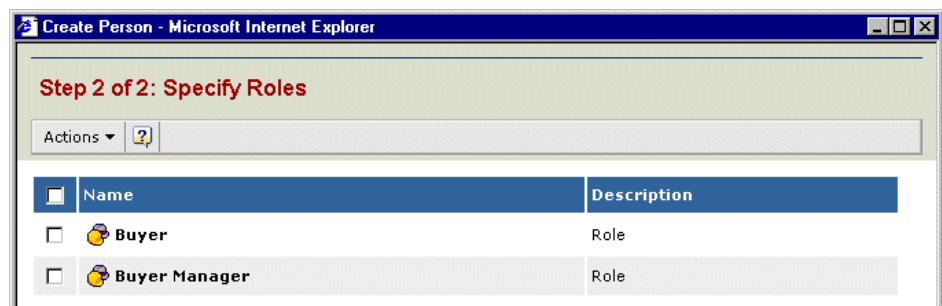
- To select the **Absence Delegate** who should be assigned tasks during the absence period, click  and select the person. See [Finding and Selecting People](#).
15. If you want to use a **Vault** other than the default, click  to specify where the person will access database objects. This field is displayed only if more than one vault is available to the context user.
 16. Select a **Vault Search Preference**.
 17. Select a **JT Viewer**.
 18. Select a **Default Store**.
 19. Click **Next**.
See [Assigning Roles](#).

Assigning Roles

After you create the basic definition for a person, you can assign roles to that person.

To assign roles to a person

1. Click the check box in the row for each role you want to assign for the person. You can click the check box in the column heading to select all roles.



2. If the role you want is not listed:
 - To add a role, click **Add Role** from the page Actions menu. Then search and select the role.
 - To add a group, click **Add Group** from the page Actions menu. Then search and select the group.
3. Click **Done** to add the new role(s) to the database.

Maintaining People Information

After person definitions have been added, they may need modification. For example, a person may move from one company location to another or change phone numbers. A promotion may require changes to the person's role assignments. The Organization Manager can make changes to individual person definitions.

Person definition details can be changed by accessing the company that the person works for or has role assignments in, and then locating the person from the list of employees for the company.

The following topics are covered:

[Viewing People in a Company](#)

[Adding Persons to a Company](#)

[Viewing Person Information](#)

[Editing Person Details](#)

Viewing People in a Company

To view a list of people in a company





1. Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)

The Administration: Companies page opens.

2. Click the name of the company where you want to view people.
3. From the company category list, click **People**.

The People page shows basic information about all people currently defined in the database for that company, and people who have role access within the company.

Company-5000: People

Actions   							
<input type="checkbox"/>	Name	Employee	E-mail	State	Attributes	Organizational Roles	Edit
<input type="checkbox"/>	 Billings, Maura	Yes	mbillings@companyname.com	Active	Secure ID	Employee, Specification User, Global Template Administrator	
<input type="checkbox"/>	 Smith, Thomas C.	Yes	tsmith@companyname.com	Active	Secure ID	Employee, Specification User, Organization Manager	
<input type="checkbox"/>	 Wallace, Mike	Yes	mike.wallace@companyname.com	Active	Company Rep	Employee, Specification User, Template Administrator	
<input type="checkbox"/>	 Clark, Rex	No	rex.clark@companyname.com	Active	Secure ID	Employee, Specification User, Template Administrator	

It contains the following columns:

Name. Click any highlighted **Name** to view the Properties page for that person. See [Viewing Person Information](#) for details.


Employee. Displays “yes” if the person is an employee of this organization, or “no” if they just have role assignments within this organization.

E-mail. The e-mail address entered for the person. If an e-mail address is specified, all IconMail for the person is also sent to the e-mail address. The application also sends e-mail notification to people whenever their e-mail is changed and when they are first registered. Click the highlighted link to open a new mail message addressed to the person.

State. To successfully log into the system, a person's state must be Active. A person's state should be changed to Inactive if they should no longer have access to use the system.

Attributes. The type of login access.

Organizational Roles. Lists the roles the person is assigned to within this organization.

Edit. Click  in this column to edit organizational roles for the person. The Edit Organizational Roles popup shows all roles that are defined in the person definition for this user, with check marks for currently assigned roles. Check or uncheck roles for this user. If you want to assign roles not shown in this popup, you must edit the person definition. See [Editing Person Details](#).

4. To add a new employee to the organization, click **Create New** from the page Actions menu. See [Creating People Definitions](#) for details.
5. The Administrator can add users to an organization and give them specific roles within that organization. Click **Add Existing** from the page Actions menu to add role access for a person for this organization. See [Adding Persons to a Company](#).
6. To remove persons from the company list or to remove a person's organizational roles, click the check box for each person you want to remove and click **Remove** from the page Actions menu. The person definition remains in the database, but is no longer connected to the organization.

Adding Persons to a Company

Organization Managers can add users who are not employees to the company, defining the roles the user performs for the company. This provides security on objects based on a role within a specific company. For example, Jackie is defined as a Design Engineer and has access to edit attributes on a part. But the Design Responsibility for the part belongs to XYZ Corp. To have access to edit attributes on the part, Jackie must be defined as a Design Engineer within XYZ Corp. When Jackie searches for parts, only those parts with Design Responsibility assigned to XYZ Corp. will be returned in the search results.


To add a person to a company

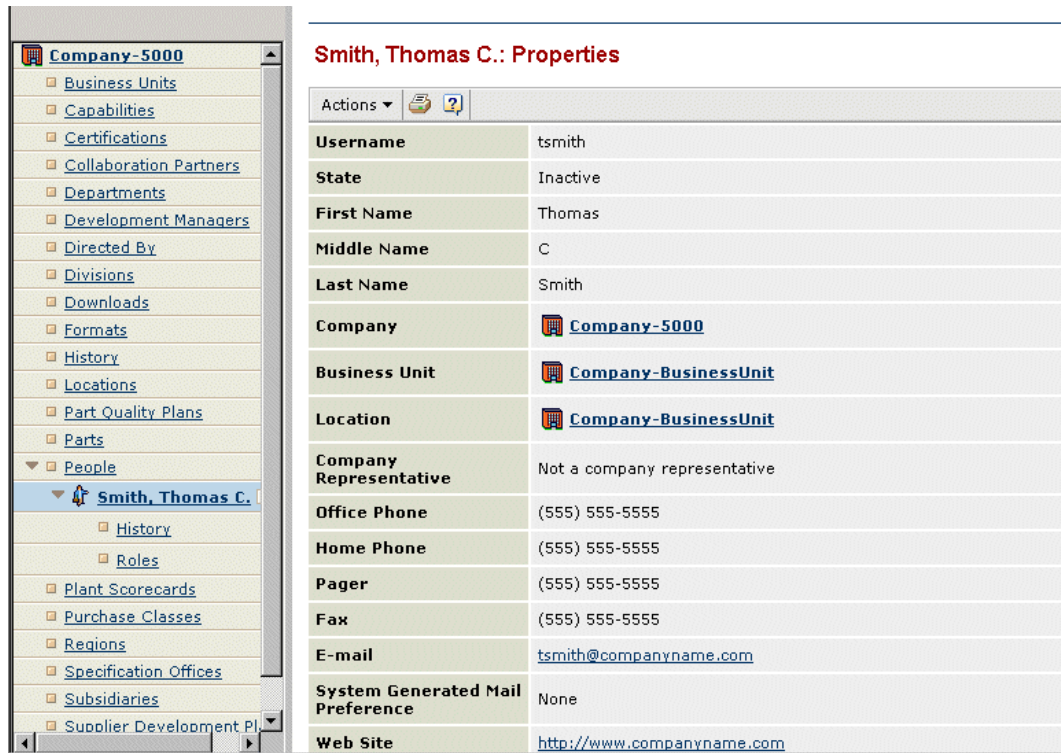
1. Access the People page for the company where you want to add people. See [To view a list of people in a company](#).
2. Click **Add Existing** from the page Actions menu. See [Finding and Selecting People](#).






Viewing Person Information

To view information for a person

1. Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)
The Administration: Companies page opens.

- Click the name of the company where you want to view information for a person, or click View my Company to view information for people in the company you represent.
- From the company category list, click **People**.
The list that is displayed shows all people currently defined in the database for that company.
- Click any highlighted **Name** to view the Properties page for that person, or click  at the end of the row to view the Properties page in a new browser window.
The Properties page opens.



Smith, Thomas C.: Properties	
Actions	 
Username	tsmith
State	Inactive
First Name	Thomas
Middle Name	C
Last Name	Smith
Company	 Company-5000
Business Unit	 Company-BusinessUnit
Location	 Company-BusinessUnit
Company Representative	Not a company representative
Office Phone	(555) 555-5555
Home Phone	(555) 555-5555
Pager	(555) 555-5555
Fax	(555) 555-5555
E-mail	tsmith@companyname.com
System Generated Mail Preference	None
Web Site	http://www.companyname.com

The Properties page contains all details entered when the person definition was created or modified. For details on specific fields, see [Creating People Definitions](#).

- To edit the properties listed, including changing the owner or co-owner, click **Edit Details** from the page Actions menu. See [Editing Person Details](#).
- To view or add roles for the context person, click **Role** from the category list. See [To add or change a person's roles](#) for details.
- To view or add groups for the context person, click **Group** from the category list.


Editing Person Details

Users assigned to the role of Organization Manager can make changes to the basic details and attributes that are specific to a person definition. The link can be accessed from a company's People page.

To edit a person definition

1. Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)

The Administration: Companies page opens.

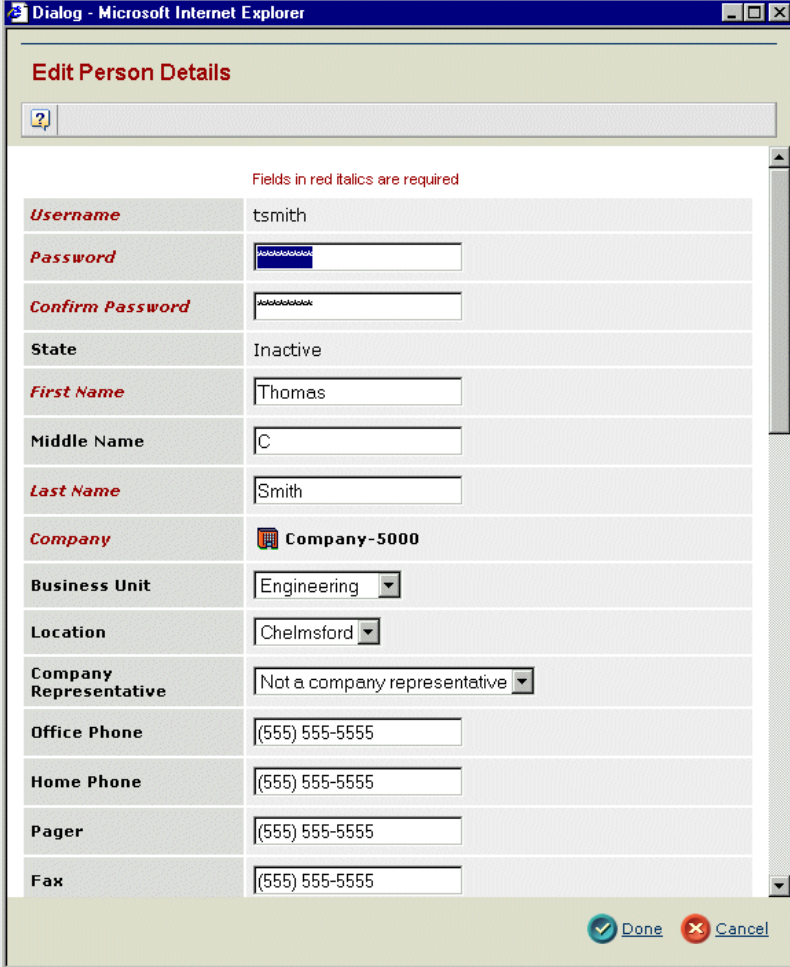
2. From the list of companies, click the highlighted link in the Name column of the company you want to view, or click  at the end of the row to view the Properties page in a new browser window.

The category list for the company opens in the left frame and the Properties page opens in the right frame.

3. From the company category list, click **People**.


The list that is displayed shows all people currently defined in the database for the context company with their login names and company names.

4. Click the name of the person whose definition you want to edit.
5. On the Properties page, click **Edit Details** from the page Actions menu.






Dialog - Microsoft Internet Explorer

Edit Person Details





Fields in red italics are required

<i>Username</i>	tsmith
<i>Password</i>	<input type="password"/>
<i>Confirm Password</i>	<input type="password"/>
<i>State</i>	Inactive
<i>First Name</i>	<input type="text" value="Thomas"/>
<i>Middle Name</i>	<input type="text" value="C"/>
<i>Last Name</i>	<input type="text" value="Smith"/>
<i>Company</i>	 Company-5000
<i>Business Unit</i>	<input type="text" value="Engineering"/>
<i>Location</i>	<input type="text" value="Chelmsford"/>
<i>Company Representative</i>	<input type="text" value="Not a company representative"/>
<i>Office Phone</i>	<input type="text" value="(555) 555-5555"/>
<i>Home Phone</i>	<input type="text" value="(555) 555-5555"/>
<i>Pager</i>	<input type="text" value="(555) 555-5555"/>
<i>Fax</i>	<input type="text" value="(555) 555-5555"/>

 Done  Cancel

6. Make changes, as necessary. The following can be changed:
7. Modify password information:

- Type the **Password** that the person will use to access the application(s). The password is case-sensitive.
 - Type the same password in the **Confirm Password** text box.
8. Modify Name information:
 - Type the person's **First Name**.
 - Type the person's **Middle Name**.
 - Type the person's **Last Name**.
 9. Modify Business Unit and Location information:
 - Select a **Business Unit** from the drop-down list.
 - Select a **Location** from the drop-down list.
 10. Change the **Company Representative** status, if applicable.
 11. Modify phone information, including any of the following:
 - **Office Phone**
 - **Home Phone**
 - **Pager**
 - **Fax**
 12. Modify network access information:
 - Add the person's **Email Address**. This address appears on the People page and provides a direct link from that page to create a new email message for the person.
 - For system-generated e-mails, specify the language in **System Generated Mail Preference**.
 - Add the URL for the person's **Web Site**, if one exists.
 13. Check whether the person's **Login Type** is Standard or Secure ID.
 14. Check whether or not the person can **Host Meetings**.
 15. Change the person's **Meeting Username**.
 16. Modify address information, including any of the following:
 - **City**
 - **State/Region**
 - **Postal Code**
 - **Country**
 17. Modify absentee information, including any of the following:
 - Click the calendar button and select the **Absence Start Date**.
 - Click the calendar button and select the **Absence End Date**. Required if the Absence Start Date is specified.
 - To select the **Absence Delegate** who should be assigned tasks during the absence period, click  and select the person. See [Finding and Selecting People](#).
 18. If you want to use a **Vault** other than the default, click  to specify where the person will access database objects. This field is displayed only if more than one vault is available to the context user.



19. Select a **JT Viewer**.
20. Select a **Default Store**.
21. Specify a **Date Format**, which is the format used for dates that display in the MatrixOne applications you use.
22. Select a **List Separator**, which defines the character used for the import/export of table data. This can be set for by individual user.
23. Click **Done** to accept changes.

To add or change a person's roles

1. From the Properties page category list for the person whose role assignments you want to change, click **Role**.

The Roles page opens, showing all roles assigned to the person with a short description of each.

Smith, Thomas C.: Roles

Actions ▾  	
Name	Description
 Buyer	Description
 Supplier Representative	Description

2. To add role assignments for the context person, click **Add Existing** from the page Actions menu.
The Search screen for Roles appears, allowing you to search for roles. For information about searching for roles, see [Finding and Selecting People](#).
3. To remove role assignments for the context person, click the check box in the row for each role assignment you want to remove and click **Remove** from the page Actions menu.

To add or change a person's groups

1. From the Properties page category list for the person whose group assignments you want to change, click **Group**.

The Groups page opens, showing all groups assigned to the person with a short description of each.

2. To add group assignments for the context person, click **Add Existing** from the page Actions menu.
The Search screen for Groups appears, allowing you to search for groups. For information about searching for roles, see [Finding and Selecting People](#).
3. To remove group assignments for the context person, click the check box in the row for each group assignment you want to remove and click **Remove** from the page Actions menu.

Editing Your Profile

You can edit your profile, which includes your system and network access information, phone and address information, and other personal attributes.

To edit your profile

Click **Tools > Edit Profile**.

The Edit Person Details page appears. For information about changing information in your profile see [Editing Person Details](#).

Viewing Inactive People

To view a list of inactive people

1. Click **Tools > Administration > Inactive People** to view a list of inactive people.

The Administration: Inactive People page opens.

It contains the following columns:

Name. Click any highlighted **Name** to view the Properties page for that person. See [Viewing Person Information](#) for details.

Organization. The organization the person belonged to.

Business Phone. The person's business phone number.

E-mail. The e-mail address entered for the person. If an e-mail address is specified, all IconMail for the person is also sent to the e-mail address. The application also sends e-mail notification to people whenever their e-mail is changed and when they are first registered. Click the highlighted link to open a new mail message addressed to the person.

2. To activate a person, click the check box for each person you want to activate and click **Activate** from the page Actions menu.

Maintaining Collaboration Partner Information

Collaboration Partners are external companies that can share parts, ECRs, or specifications with the host company. Sharing includes the ability to create new objects in the partner's vault.

The following topics are covered:

[Viewing a List of Collaboration Partners](#)

[Editing Share Types](#)

[Adding Collaboration Partners](#)

[Viewing Information for a Collaboration Partner](#)

[Editing Details About a Collaboration Partner](#)

Collaboration Partners are available only for Engineering Central or Team Central.

Viewing a List of Collaboration Partners

The Collaboration Partners page shows a table containing basic information about organizations that are defined as collaboration partners for the selected company.


To view a list of collaboration partners

1. Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)
The Administration: Companies page opens.
2. Select the parent company that you want to view collaboration partners for.
The company category list and Properties page opens.
3. From the company category list, click **Collaboration Partners**.
The Collaboration Partners page opens.

Company-5000: Collaboration Partners

Actions   					
<input type="checkbox"/>	Name	Phone	Web Site	Share Types	Edit Share Types
<input type="checkbox"/>	 Company-5000	(555) 555-5555	www.company5000.com	ECR, Drawing Print	
<input type="checkbox"/>	 Company-5112	(555) 555-5555	www.company5000.com	Part, CAD Drawing, Drawing Print	
<input type="checkbox"/>	 Company-5113	(555) 555-5555	www.company5000.com	CAD Model, CAD Drawing	
<input type="checkbox"/>	 Company-5114	(555) 555-5555	www.company5000.com	CAD Drawing	
<input type="checkbox"/>	 Company-5115	(555) 555-5555	www.company5000.com	CAD Model, CAD Drawing	
<input type="checkbox"/>	 Company-5116	(555) 555-5555	www.company5000.com	CAD Model, CAD Drawing	


It contains the following columns:

Name. Click on any highlighted link in the Name column to view the Properties page for that object, or click  at the end of the row to view the Properties page in a new browser window.

Phone. The main business unit phone number, as included in the business unit definition.

Web Site. The URL of the business unit's Web site.

Share Types. Comma-separated list of types that the collaboration partner allows to be created in their company.


Edit Share Types. For those with edit access, this column contains an icon that provides access to the Edit Share Types page. Click  to edit share types. See [Editing Share Types](#).

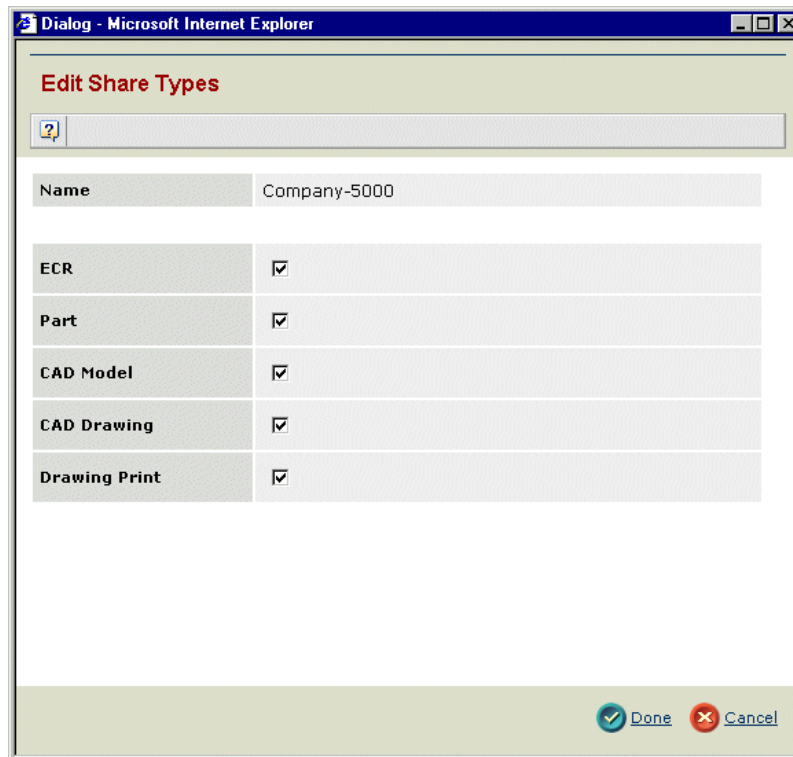
4. To add a collaboration partner to the list, click **Add Existing**. See [Adding Collaboration Partners](#).
5. To remove collaboration partners from the list, click the check box for each collaboration partner you want to remove and click **Remove Selected** from the page Actions menu. To select all collaboration partners in the list, click the check box in the column heading.

This removes the connection between the collaboration partner and the company, but does not delete the collaboration partner from the database.

Editing Share Types

To edit share types

1. From the category list of the company, click **Collaboration Partners**.
2. Select a partner and click  from the **Edit Share Types** column.



3. Check or uncheck boxes for the types you want to collaborate on with this partner.
4. Click **Done**.

Adding Collaboration Partners

To add a collaboration partner

1. From the category list of the company, click **Collaboration Partners**.
2. From the Collaboration Partners page, click **Add Existing** from the page Actions menu to search for and select companies to add as collaboration partners. If the company has not yet been defined in the database, you must first create it. See *Creating a Company, Subsidiary, Business Unit, or Department*.

Step 1 of 3: Find Companies

Type	Company
Name	<input type="text"/>
Revision	<input type="text"/>
Description	<input type="text"/>
Vault	<input type="text" value="all"/> <input type="button" value="Clear"/>
Owner	<input type="text"/>
Originator	<input type="text"/>




3. Enter information to refine the search, or accept the defaults to find all companies.
4. Click **Next**.

Step 2 of 3: Select Collaboration Partners

<input type="checkbox"/>	Name	Phone	Web Site
<input type="checkbox"/>	Company-5000	(555) 555-5555	www.company5000.com
<input type="checkbox"/>	Company-5112	(555) 555-5555	www.company5000.com
<input type="checkbox"/>	Company-5113	(555) 555-5555	www.company5000.com
<input type="checkbox"/>	Company-5114	(555) 555-5555	www.company5000.com
<input type="checkbox"/>	Company-5115	(555) 555-5555	www.company5000.com
<input type="checkbox"/>	Company-5116	(555) 555-5555	www.company5000.com

5. Click the check box for each company that you want to add as a collaboration partner and click **Next**.

Step 3 of 3: Specify Share Types


Name	Phone	Web Site	Share Types				
			ECR	Part	CAD Model	CAD Drawing	Drawing Print
 Company-5000	(555) 555-5555	www.company5000.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 Company-5112	(555) 555-5555	www.company5000.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 Company-5113	(555) 555-5555	www.company5000.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

6. On the Specify Share Types page, click the check box for each object type that you want each organization to collaborate on. These types will be allowed to be created in the partner's vault.
7. Click **Done**.
The organizations are added and the Collaboration Partners page is redisplayed showing additions.

Viewing Information for a Collaboration Partner

The Collaboration Partner Properties page shows a table containing details about the collaboration partner. This page provides access to modify collaboration partner details.

To view information for a collaboration partner

1. Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)
The Administration: Companies page opens.
2. Select the parent company that you want to view collaboration partner information for.
The company category list and Properties page opens.
3. From the company category list, click **Collaboration Partners**.
4. From the list of collaboration partners, click the highlighted link in the Name column of the collaboration partner you want to view, or click  at the end of the row to view the Properties page in a new browser window.
The category list for the collaboration partner opens in the left frame and the Properties page opens in the right frame, showing details about the collaboration partner. All fields are read-only.
The Collaboration Partner Properties page contains details entered when the collaboration partner was created or modified. For details on specific fields, see [Creating a Company, Subsidiary, Business Unit, or Department](#).
5. To edit the properties listed, click **Edit Details** from the page Actions menu. See [Editing Details about a Company](#).

- Use the category list to view additional information about the collaboration partner.

Category	Description	For details, see:
Business Units	Lists the business units for the partner company.	Viewing a List of Business Units
Capabilities	Lists the capabilities for the partner company.	Viewing a List of Capabilities
Collaboration Partners	Lists collaboration partners associated with the current collaboration partner.	Viewing a List of Collaboration Partners
Departments	Lists the departments added for the partner company.	Viewing a List of Departments
Formats	Lists for the formats available for the partner company.	Viewing a List of Formats
History	Shows a log of events that have occurred for the partner company.	See the <i>AEF User Guide</i> .
Locations	Shows location details for the partner company.	Viewing a List of Locations
People	Provides access to definitions of people who work for the partner company.	Viewing People in a Company
Regions	Lists the regions for the partner company.	Viewing a List of Regions
Specification Offices	Lists the specification offices for the partner company.	Viewing a List of Specification Offices
Subsidiaries	Lists the subsidiaries for the partner company.	Viewing a List of Subsidiaries

Editing Details About a Collaboration Partner

Users assigned to the role of Organization Manager can edit information about collaboration partners.

To edit details about a collaboration partner

- Click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)
The Administration: Companies page opens.
- Click the **Name** of the parent company of the collaboration partner. The category list and Properties page opens for the selected company.
- From the Company category list, click **Collaboration Partners**.
(Collaboration partners can also have collaboration partners connected to them. If you want to view information about a partner of a partner, you need access the collaboration partners under the company category list, then click **Collaboration Partners** from the Collaboration Partner category list.)
- Click the **Name** of the collaboration partner you want to edit. The category list and Properties page opens for the selected collaboration partner.
- From the Properties page, click **Edit Details** from the page Actions menu.

Dialog - Microsoft Internet Explorer

Edit Company Details

Fields in red italics are required

Image	<input type="text"/>	Browse...
<i>Name</i>	<input type="text" value="Company-5000"/>	
Parent Company	<input type="text" value="Global Company-5000"/>	... Clear
<i>Company ID</i>	<input type="text" value="012-3456789"/>	
Cage Code	<input type="text" value="3266456128"/>	
DUNS Number	<input type="text" value="3132654"/>	
Phone Number	<input type="text" value="(203) 555-1212"/>	
Fax Number	<input type="text" value="(203) 555-1212"/>	
Web Site	<input type="text" value="www.company-5000.com"/>	
File Store	<input type="text" value="STORE"/>	
FTP Host	<input type="text" value="ftp.company-5000.com"/>	
FTP Directory	<input type="text" value="/pub/apps"/>	
<i>Meeting Site Name</i>	<input type="text" value="Meeting Site Name http"/>	
<i>Meeting Site ID</i>	<input type="text" value="151"/>	

Done Cancel

- Use the Edit Details page to make changes. For details on specific fields, see [Creating a Company, Subsidiary, Business Unit, or Department](#).
- When you have modified all necessary fields, click **Done**.

Responding to Collaboration Requests

When another organization (company or business unit) invites your organization to collaborate, you can either accept or reject the invitation. Accepting the invitation means that employees from both organizations can include employees from the other organization as workspace members.

To respond to an invitation to collaborate

- Click **Tools > Administration > Collaboration Requests** (available only for Company Representatives).

The Administration: Collaboration Requests page shows all collaboration requests from and to the organization you represent.

- To accept a collaboration request from another organization, check the row for the request and click **Accept**.

The system sends emails and IconMail to:

- all Company Representatives for the organization that made the request; the message says your organization has accepted the request
- all Company Representatives for your organization; the message confirms that the request has been accepted

3. To reject a request to collaborate from another organization, check the row for the request and click **Reject**.

The system notifies the Company Representatives for both organizations and says the invitation has been rejected.

Maintaining Specification Offices

Specification offices are sub units of business units. A user can be part of more than one specification office. The user must use the specification office to work with the assigned SCOs.

Specification Offices are available only for Specification Central.

The following topics are covered:

[Viewing a List of Specification Offices](#)

[Creating a Specification Office](#)

[Viewing Information for a Specification Office](#)

[Editing Details of a Specification Office](#)

Viewing a List of Specification Offices

To view a list of specification offices

1. Access the category list and Properties page for the company or subsidiary you want specification office information for.






For example, click **Tools > Administration > Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)

The Administration: Companies page opens.

2. Select a company by name.
3. From the category list, click **Specification Offices**.

Specification offices already defined for the organization are listed. To see details about a specification office, click its Name.

Company-5000: Specification Offices

Actions ▾   				
<input type="checkbox"/>	Name	Assigned	Description	Status
<input type="checkbox"/>	 SpecOffice-5000	Yes	Description	Active
<input type="checkbox"/>	 SpecOffice-5001	Yes	Description	Active

4. To add a capability to the database, click **Create New** from the page Actions menu. See [Creating a Specification Office](#).
5. To delete specification offices from the selected company or subsidiary, click the check box for each office you want to delete and click **Delete** from the page Actions menu. To select all offices in the list, click the check box in the column heading.



A message is displayed, asking you to confirm that you want to delete the office(s). Click **Yes** to confirm the deletion or click **No** if you want the office(s) to remain.

Creating a Specification Office

To create a new specification office


1. Access the category list and Properties page for the company or subsidiary you want to create a specification office for.
2. Click **Create New** from the page Actions menu.

The screenshot shows a web browser window titled "MatrixOne - Microsoft Internet Explorer". The main content area is titled "Create New Specification Office". Below the title is a search bar with a question mark icon. A red note indicates "Fields in red italics are required". The form contains four fields: "Name" (text input), "Business Unit" (dropdown menu with a "Clear" button), "Description" (text area), and "Vault" (dropdown menu with "eService Productio" selected). At the bottom right are "Done" and "Cancel" buttons.

3. Enter details about the office, including the following:
 - Name.** Name of the specification office. Required.
 - Business Unit.** Click  and select the business office for the specification office. See [Using Search](#).
 - Description.** A description of the specification office.
 - Vault.** Click  and select the vault for the specification office. See [Selecting a Vault](#).
4. Click **Done**.

Viewing Information for a Specification Office


To view information for a specification office

1. Open the Properties page for the company or subsidiary you want to view specification offices for.
2. From the category list, click **Specification Offices**.
3. From the list of offices, click the highlighted link in the Name column of the office you want to view, or click  at the end of the row.
4. Click **Properties** in the category list.

5. To edit the properties listed, click Edit Details from the page Actions menu. See [Editing Details of a Specification Office](#).
6. Use the category list to view additional information about the specification office:

Category	Description	For details, see:
Assigned SCOs	Lists the SCOs assigned to the specification office.	<i>Specification Central User Guide</i>
Lifecycle	Shows the lifecycle of the specification office.	<i>AEF User Guide</i>
Member Lists	Lists the member lists.	<i>Specification Central User Guide</i>
Members	Lists the individual members.	<i>Specification Central User Guide</i>
Route Templates	Lists the route templates.	Listing Route Templates
Supporting Organizations	Lists the supporting organizations.	<i>Specification Central User Guide</i>

Editing Details of a Specification Office

1. Open the Properties page for the company or subsidiary you want to view specification offices for.
2. From the category list, click **Specification Offices**.
3. From the list of specification offices, click the highlighted link in the Name column of the office you want to view, or click  at the end of the row.
4. From the category list, click **Properties**.
5. Click **Edit Details** from the page Actions menu.

Dialog - Microsoft Internet Explorer

Edit Spec Office Details

Fields in red italics are required

<i>Name</i>	<input type="text" value="SpecOffice-5000"/>
<i>Business Unit</i>	<input type="text" value="Tissues & Towel"/> <input type="button" value="Clear"/>
Description	<input type="text" value="Descriptive text about this company goes here."/>

6. Use the Edit Spec Office Details page to make changes. For details on specific fields, see [Creating a Specification Office](#).
7. When you have modified all necessary fields, click **Done**.

Maintaining Capabilities Information

A capability describes a supplier's ability to perform a process (Manufacturing, Design, Testing). Any Buyer Administrator or Supplier Representative can view, add, edit, and delete capabilities for their own company. Buyers and Buyer Administrators can view capabilities for any active company.

The following topics are covered:

[Viewing a List of Capabilities](#)

[Creating a Capability](#)

[Adding an Existing Capability](#)

[Viewing Information for a Capability](#)

[Editing Details About a Capability](#)






Viewing a List of Capabilities

The Capabilities page shows a table containing basic information about capabilities that are defined for the selected company or subsidiary.

To view a list of capabilities

1. Open the Properties page for the company or subsidiary you want to view capabilities for.
2. From the category list, click **Capabilities**.
The Capabilities page opens.

Company-5000: Capabilities

Actions ▾  				
<input type="checkbox"/>	Name	Process Type	Status	Process Qualification Status
<input type="checkbox"/>	 Heat Treatment	Manufacturing Process	Unknown	Unknown
<input type="checkbox"/>	 Die Casting	Design Process	Unknown	Unknown
<input type="checkbox"/>	 Machining	Manufacturing Process	Unknown	Unknown

3. To add a capability to the database, click **Create New** from the page Actions menu. See [Creating a Capability](#).
4. To add an existing capability for the selected company or subsidiary, click **Add Existing** from the page Actions menu. See [Adding an Existing Capability](#).
5. To remove capabilities from the selected company or subsidiary, click the check box for each capability you want to remove and click **Remove** from the page Actions menu. To select all capabilities in the list, click the check box in the column heading.
A message is displayed, asking you to confirm that you want to remove the item(s). Click **Yes** to confirm the removal or click **No** if you want the item(s) to remain associated with the company or subsidiary.

Creating a Capability

To add a capability

1. List the capabilities for the selected company or subsidiary.
2. Click **Create New** from the page Actions menu.

Dialog - Microsoft Internet Explorer

Create New Capability

Fields in red italics are required

Process	Design
<i>Process Type</i>	Casting
Capability Status	
Process Qualification Status	Unknown
Prototype Capability	Unknown
Standard Lead Time Prototype	
Standard Lead Time Tooling	
Material Limitation	
Shape Limitation	
Size Limitation	
Weight Limitation	
Comments	

Done Cancel

3. Enter details about the region, including the following:

Process. Process for the capability.

Process Type. Process type. Required.

Capability Status. Status of the capability.

Process Qualification Status. Indicates the buyer understanding of the supplier's capability for a Process. Select an option from the drop-down list. Available options are:

- **Unknown.** Supplier qualification status is not known.
- **Planning.** Supplier is planning to qualify.
- **Qualifying.** Supplier is in process of qualifying.
- **Qualified.** Supplier is fully qualified.
- **Re-Qualifying.** Supplier is requalified after a period of disqualification.

Prototype Capability. A supplier's ability to make non-production, prototype parts with a process. Available options are:

- **Unknown.** Supplier's prototype capability unknown for this process.
- **Yes.** Supplier has prototype capability for this process.
- **No.** Supplier does not have prototype capability for this process.

Standard Lead Time Prototype. The standard time (days) between receipt-of-order and delivery of the first prototype parts.

Standard Lead Time Tooling. The standard time (days) between receipt-of-order and the availability of production tooling.

Material Limitation. A limitation of part material(s) for a process capability.

Shape Limitation. A limitation of part shape for a process capability.

Size Limitation. A limitation of part dimension for a process capability.

Weight Limitation. A limitation of part dimension for a process capability.

Comments.

4. Click **Done**.

Adding an Existing Capability

You can add an existing capability to a company or subsidiary.

To add an existing capability

1. List the capabilities for the selected company or subsidiary.
2. Click **Add Existing** from the page Actions menu.

The screenshot shows a web browser window titled "MatrixOne - Microsoft Internet Explorer" displaying the "Add Capability" form. The form has a header with a question mark icon and a note: "Fields in red italics are required". The form is organized into several sections:

- Process:** A radio button for "Manufacturing Process" is selected. Below it are three dropdown menus: "Molding", "Analysis", and "Drafting".
- Capability Status:** An empty text input field.
- Process Qualification Status:** A dropdown menu with "Planning" selected.
- Prototype Capability:** A dropdown menu with "No" selected.
- Standard Lead Time Prototype:** An empty text input field.
- Standard Lead Time Production:** An empty text input field.
- Standard Lead Time Tooling:** An empty text input field.
- Material Limitation:** An empty text input field.
- Shape Limitation:** An empty text input field.


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

3. Select one of the following processes:
Manufacturing Process
Testing Process
Design Process
4. For the process(es) you selected, select the process type from the drop-down menu.
5. Enter any other information that is required for the capability in your MatrixOne applications.
6. Click **Done**.


Viewing Information for a Capability

The Capability Properties page shows a table containing details about a capability. This page provides access to modify capability details. To view capability details, you must first access the Company or Subsidiary that the region is defined for.

To view information for a capability

1. Open the Properties page for the company or subsidiary you want to view capabilities for.
2. From the category list, click **Capabilities**.
3. From the list of capabilities, click the highlighted link in the Name column of the capability you want to view, or click  at the end of the row to view the Properties page in a new browser window.

The category list for the capability opens in the left frame and the Properties page opens in the right frame, showing details about the capability. All fields are read-only.



Capability-5000: Properties	
Actions	  
Company	 Company-5000
Process	Design
Process Type	Casting
Capability Status	Unknown
Process Qualification Status	Planning
Prototype Capability	Yes
Standard Lead Time Prototype	0
Standard Lead Time Tooling	0
Material Limitation	
Shape Limitation	Unknown
Size Limitation	Unknown
Weight Limitation	Unknown
Comments	


The Properties page for a capability contains details about the capability. For details on specific fields, see [Creating a Capability](#).

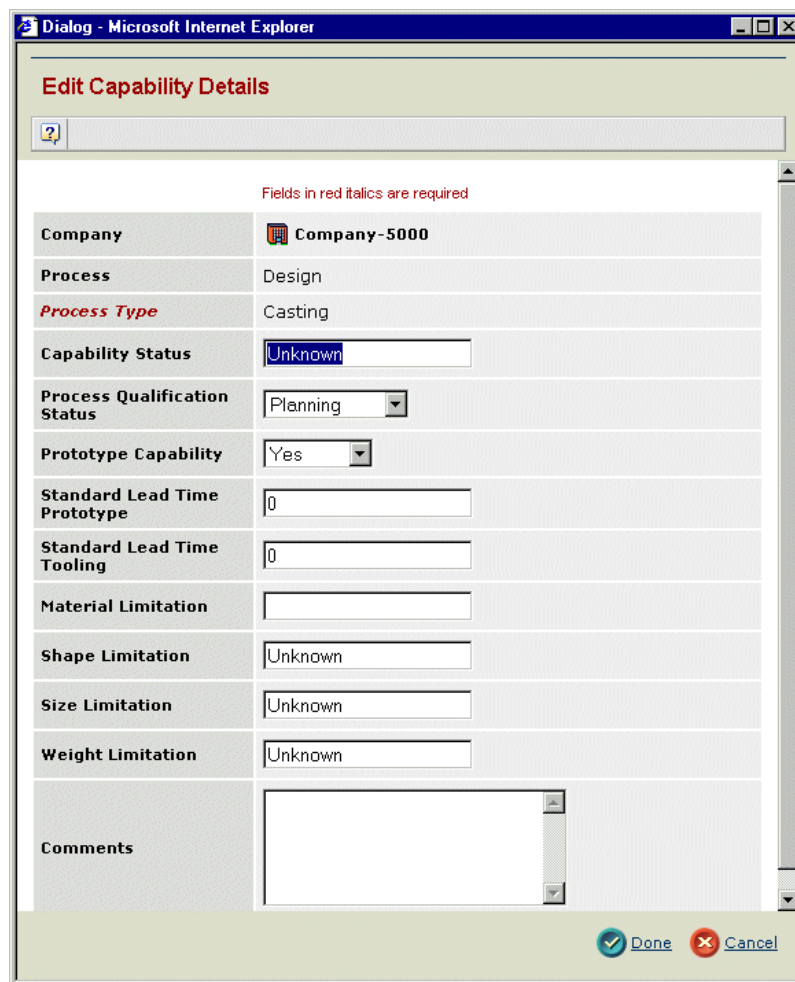
4. To edit the properties listed, click **Edit Details** from the page Actions menu. See [Editing Details About a Capability](#).

Editing Details About a Capability

Users assigned to the role of Organization Manager can edit information about a capability.

To edit details about a capability


1. Open the Properties page for the company or subsidiary you want to view capability for.
2. From the category list, click **Capabilities**.
3. From the list of capabilities, click the highlighted link in the Name column of the capability you want to view, or click  at the end of the row to view its Properties.
4. From the Properties page, click **Edit Details** from the page Actions menu.





Dialog - Microsoft Internet Explorer

Edit Capability Details

Fields in red italics are required

Company	 Company-5000
Process	Design
<i>Process Type</i>	Casting
Capability Status	<input type="text" value="Unknown"/>
Process Qualification Status	<input type="text" value="Planning"/>
Prototype Capability	<input type="text" value="Yes"/>
Standard Lead Time Prototype	<input type="text" value="0"/>
Standard Lead Time Tooling	<input type="text" value="0"/>
Material Limitation	<input type="text"/>
Shape Limitation	<input type="text" value="Unknown"/>
Size Limitation	<input type="text" value="Unknown"/>
Weight Limitation	<input type="text" value="Unknown"/>
Comments	<input type="text"/>

 Done  Cancel

5. Use the Edit Capability Details page to make changes. For details on specific fields, see [Creating a Capability](#).
6. When you have modified all necessary fields, click **Done**.

Maintaining Format Information

File format identifies the types of files a company can generate and add to the MatrixOne application.

The following topics are covered:

[Viewing a List of Formats](#)

[Adding an Existing Format](#)

Viewing a List of Formats




The Formats page shows a table containing basic information about capabilities that are defined for the selected company or subsidiary.

To view a list of formats

1. Open the Properties page for the company or subsidiary you want to view formats for.
2. From the category list, click **Formats**.

The Formats page opens.

Company-5000: Formats

<input type="checkbox"/>	Name	Version
<input type="checkbox"/>	 AutoCAD	Version 13.0
<input type="checkbox"/>	 Microsoft Excel	Ver 2000
<input type="checkbox"/>	 Microsoft Word	Version 2000

3. To add an existing format for the selected company or subsidiary, click **Add Existing** from the page Actions menu. See [Adding an Existing Format](#).
4. To remove formats from the selected company or subsidiary, click the check box for each format you want to remove and click **Remove** from the page Actions menu. To select all formats in the list, click the check box in the column heading.

A message is displayed, asking you to confirm that you want to remove the format(s). Click **Yes** to confirm the removal or click **No** if you want the format(s) to remain associated with the company or subsidiary.

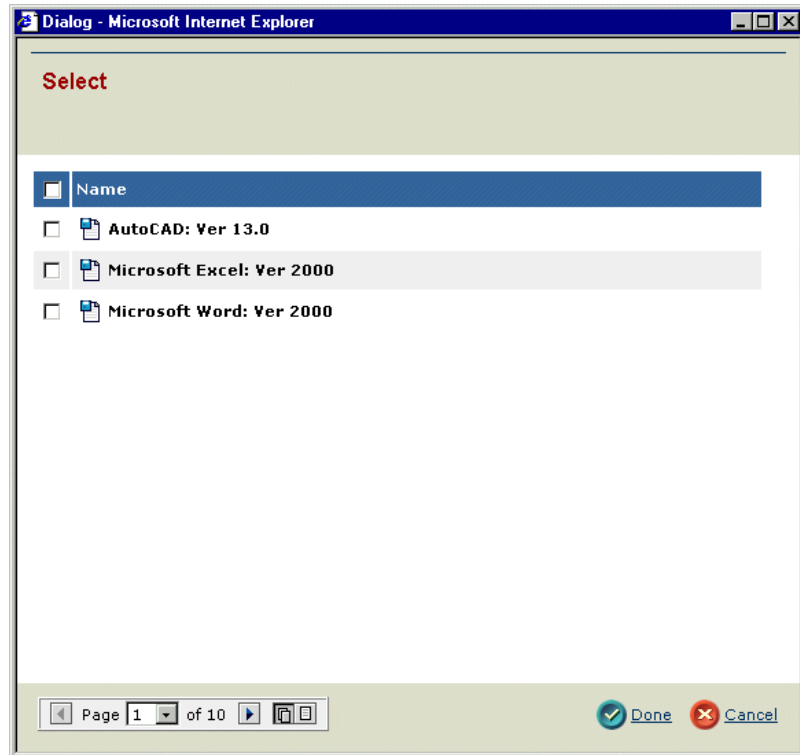
Adding an Existing Format

You can add an existing format to a company or subsidiary.

To add an existing format

1. List the formats for the selected company or subsidiary.
2. Click **Add Existing** from the page Actions menu.

The Select page opens.



3. Select one or more formats for the company or subsidiary: To select all formats in the list, click the check box in the column heading.
4. Click **Done**.

Maintaining Potential Supplier Information

A potential supplier is a company that acts as a supplier. Organization Managers can create potential suppliers.

Potential Suppliers is available only for Supplier Central.

The following topics are covered:

[Viewing a List of Potential Suppliers](#)

[Viewing Information for a Potential Supplier](#)

[Editing Details About a Potential Supplier](#)

Viewing a List of Potential Suppliers

The Potential Suppliers page shows a table containing basic information about suppliers.


To view a list of potential suppliers

1. Click **Tools > Administration > Potential Suppliers** to view a list of suppliers. (This link is available only for users defined in the role of Organization Manager.)

The Administration: Potential Suppliers page opens.

Administration: Potential Suppliers

Actions  						
<input type="checkbox"/>		Name ▼	State	Phone	Web Site	Company
<input type="checkbox"/>		 BusinessUnit-5000	Active	(555) 555-5555	www.company5000.com	Company-5000
<input type="checkbox"/>		 Company-5112	Active	(555) 555-5555	www.company5000.com	Company-5000
<input type="checkbox"/>		 Company-5113	Active	(555) 555-5555	www.company5000.com	
<input type="checkbox"/>		 Company-5114	Active	(555) 555-5555	www.company5000.com	
<input type="checkbox"/>		 Company-5115	Active	(555) 555-5555	www.company5000.com	
<input type="checkbox"/>		 Company-5116	Inactive	(555) 555-5555	www.company5000.com	


Potential Suppliers are designated by the  icon next to their name.

2. To add an existing company as a potential supplier to the list, click **Add Existing** from the page Actions menu. Use the Search page to find and select the company.
3. There are several ways to discontinue working with a potential supplier:
 - To delete the company definitions for potential suppliers from the database, click the check box for each supplier you want to delete and click **Delete** from the page Actions menu. To select all suppliers in the list, click the check box in the column heading.
 - To remove suppliers from the list but keep their company definitions, click the check box for each supplier you want to remove and click **Remove as Potential Supplier** from the page Actions menu.
 - To deactivate suppliers, click the check box for each supplier you want to deactivate and click **Deactivate** from the page Actions menu.

Viewing Information for a Potential Supplier

The Properties page shows a table containing details about a company or business unit that is a potential supplier. This page provides access to modify company or business unit details.

To view information for a potential supplier

1. From the list of potential suppliers, click the highlighted link in the Name column of the supplier you want to view, or click  at the end of the row to view the Properties page in a new browser window.

The category list for the supplier opens in the left frame and the Properties page opens in the right frame, showing details about the supplier. All fields are read-only.

The Properties page contains details about the supplier. For details on specific fields, see [Creating a Company, Subsidiary, Business Unit, or Department](#).

2. To edit the properties listed, click **Edit Details** from the page Actions menu. See [Editing Details About a Potential Supplier](#).
3. Use the category list to view additional information about the company or business unit. For more information, see [Viewing Information for a Company](#).

Editing Details About a Potential Supplier

Users assigned to the role of Organization Manager can edit information about a company or business unit that is a potential supplier.

To edit details about a potential supplier

1. Open the Properties page for the company or business unit that is the potential supplier.
2. Click **Edit Details** from the page Actions menu. For more information, see [Editing Details about a Company](#).

Maintaining Currency Exchange Rate Information

The data for some fields shown MatrixOne applications is based on a particular currency, such as unit price. The system displays this data based on the currency used by the person who enters the price. Users can convert this data to a selected currency. Buyer Administrators must define the currencies that can be converted and their conversion rates for their company. For each conversion, you can specify different exchange rates for specific time periods.

- [Viewing Currency Exchange Rates for Your Company](#)
- [Adding an Exchange Rate](#)
- [Editing an Exchange Rate](#)
- [Deleting a Currency Exchange Rate](#)

Viewing Currency Exchange Rates for Your Company

To view currency exchange rates for your company

1. Open the Properties page for the company you want to view currency exchange rates for.
2. From the category list, click **Currency Exchange Rates**.

ABC company: Currency Exchange Rates

	From Currency	To Currency	Rate	Effective Date
--	---------------	-------------	------	----------------

3. Work with the exchange rates as needed:
 - To add a new rate, click **Add New Exchange Rate**.
 - To delete a rate, check it and click **Delete**.

Adding an Exchange Rate


To define the currencies that users can convert to and the exchange rates to use for specific time periods, perform the following steps for each pair of currencies that you want to convert. If you create a new exchange rate for the same currency and effective date as an existing exchange rate (but with a different exchange rate), the system uses the newest exchange rate.

To add an exchange rate for a company

1. Click **Tools > Administration > View My Company**. (This link is only available for people designated as a Buyer Administrator or Supplier Representative.)
2. From the category list for the company, click **Currency Exchange Rates**.
3. From the Currency Exchange Rates page, click **Add New Exchange Rate** from the page Actions menu.

Add New Exchange Rate

Fields in red italics are required

<i>From Currency</i>	Dollar
<i>To Currency</i>	Euro
<i>Rate</i>	1.2751
<i>Effective Date</i>	Feb 13, 2004 

4. Choose the currency you want to convert from using the **From Currency** list.
5. Choose the currency you want to convert to using the **To Currency** list.
6. Enter the **Rate** for the exchange.
7. Enter the **Effective Date** for the rate by clicking the Calendar icon. The selected date is always assumed to be 12:00 am unless the date is appended with a different time.
8. Click **Done**.

The new exchange rate is added to the company's Currency Exchange Rate page.

Editing an Exchange Rate

To edit an exchange rate for a company

1. Click **Tools > Administration > View My Company**. (This link is only available for people designated as a Buyer Administrator or Supplier Representative.)
2. From the category list for the company, click **Currency Exchange Rates**.
3. From the Currency Exchange Rates page, click the **Edit** from the page Actions menu.
4. On the Edit Exchange Rate page, change the information as needed.
 - Enter the **Rate** for the exchange.
 - Enter the **Effective Date** for the rate by clicking the Calendar icon. The selected date is always assumed to be 12:00 am unless the date is appended with a different time.
5. Click **Done**.

Deleting a Currency Exchange Rate

To delete an exchange rate for a company

1. Click **Tools > Administration > View My Company**. (This link is only available for people designated as a Buyer Administrator or Supplier Representative.)
2. From the category list for the company, click **Currency Exchange Rates**.
3. From the Currency Exchange Rates page, check the exchange rate you want to delete.
4. Click **Delete** from the page Actions menu.
5. At the confirmation message, click **OK**.

Document Management

Document Management Overview

Common document management allows MatrixOne applications to manage documents and files in a similar manner.

Common document management consists of the following:

Viewing Documents and Content

Creating a New Document

Uploading Files with the Applet

Uploading Files without the Applet

Viewing Properties for a Document

Editing Details about a Document

Viewing Files for a Document

Updating a File

Viewing File Versions

Viewing Document Revisions

Viewing Document Sheets





















Viewing Documents and Content

You can view a list of documents and content associated with an object in an application. Icons show what actions can be performed on the content.

To view documents

1. From the MatrixOne application you are using, list the content for the object.

B1: Documents

Actions ▾   										
			Name ▲	Title	Rev	Ver	Type	Actions	Description	State
<input type="checkbox"/>	0/1		Doc-0000001	Doc-0000001	1	1	Generic Document	    		Create 
<input type="checkbox"/>	0/1		ee-66692440500	ee	1	1	Generic Document	    		Create 

Name. Click the name to view details about the content.






Title. The title of the content item.

Rev. The revision ID. Click the revision ID to view information about this revision. See [Viewing Document Revisions](#).

Ver. The version ID. Click the version ID to view information about this version. See [Viewing File Versions](#).

Type. The content type.


Actions. The following icons represent the allowable actions you can perform on the listed content:

Icon	Name	Action
	Subscription	To view and select subscriptions for a document. See Subscribing to a Document .
	Download	To download one or more files to your local machine. Browse to the directory or folder you want to contain the file. Multiple files are downloaded in a single zip file.
	Checkout and Lock	To checkout one or more files to your local machine and lock the files from other users who cannot unlock it. Navigate to the folder or directory you want to contain the file.
	Update Files	To update a file to its next version.
	Checkin	To checkin and unlock one or more files. See either Uploading Files with the Applet or Uploading Files without the Applet .

Description. A description of the content.

State. The current state of the content.

2. To create a new document, click the Actions menu and select **Create New**. See [Creating a New Document](#).

3. To add an existing file to the file list for the object, click the Actions menu and select **Add Existing**. Find and select the document.
4. To download one or more files, to your machine, click its check box and then click the Actions menu and select **Download**. Multiple files are downloaded in a single zip file.
5. To checkout one or more files to your local machine and lock the files, click its check box and then click the Actions menu and select **Checkout**.
6. To subscribe to a document, click its checkbox and then click the Actions menu and select **Subscribe to Selected**. See [Subscribing to a Document](#).
7. To edit the lifecycle block for route content only, click the checkbox for the content and then click the Actions menu and select **Edit Lifecycle Block**. See [To specify a blocked state for a route](#).
8. To remove a document in the list, click its check box and then click the Actions menu and select **Remove Selected**. The document is removed from the list but it is not deleted.
A message is displayed, asking you to confirm that you want to remove the document(s). Click **Yes** to confirm the removal or click **No**.
9. To view files for a document, click its Name. See [Viewing Files for a Document](#).
10. To view the properties for a document, click  at the end of the row. See [Viewing Properties for a Document](#).

Creating a New Document

This section describes how to create a document.

To create a document

1. From the page that lists documents, click **Create New** from the page Actions menu.

MatrixOne - Microsoft Internet Explorer

Step 1 of 2: Specify Details

Fields in red italics are required

Name	<input type="text"/>	<input checked="" type="checkbox"/>
Type	Generic Document	...
Policy	Controlled Production Release Rev2	▼
Title	<input type="text"/>	
Description	<input type="text"/>	
Release Type	<input type="text"/>	▼
Design Group Owner	null	
Created On	<input type="text"/>	ⓧ
Approver	null	

Next Cancel

2. Enter the following information:

Name— Type a name for the document. Names are case-sensitive and spaces are allowed. You can use complete names rather than contractions, making the terminology in your system easier for people to understand. Generally, name lengths can be a maximum of 127 characters. Leading and trailing spaces are ignored. To have the system generate the name, click the checkbox.

Type—The defaulted type is Generic Document. To select another document type, click and select the type. Required.

Policy—Select a policy for the document. Required.

Title—Type a title for the document.

Description—Type a description of the document.

Release Type—Select whether this is for a Design Release or a Production Release.

Design Group Owner—For design documents, type the owner.

Created On—The create date defaults to today's date. If you need to change this date, click and then select another date.

Approver—Click and select a person as Approver.

You may also see one or more custom attributes for the object. If a custom attribute field name appears in red, it is a required field.

3. Click Next.

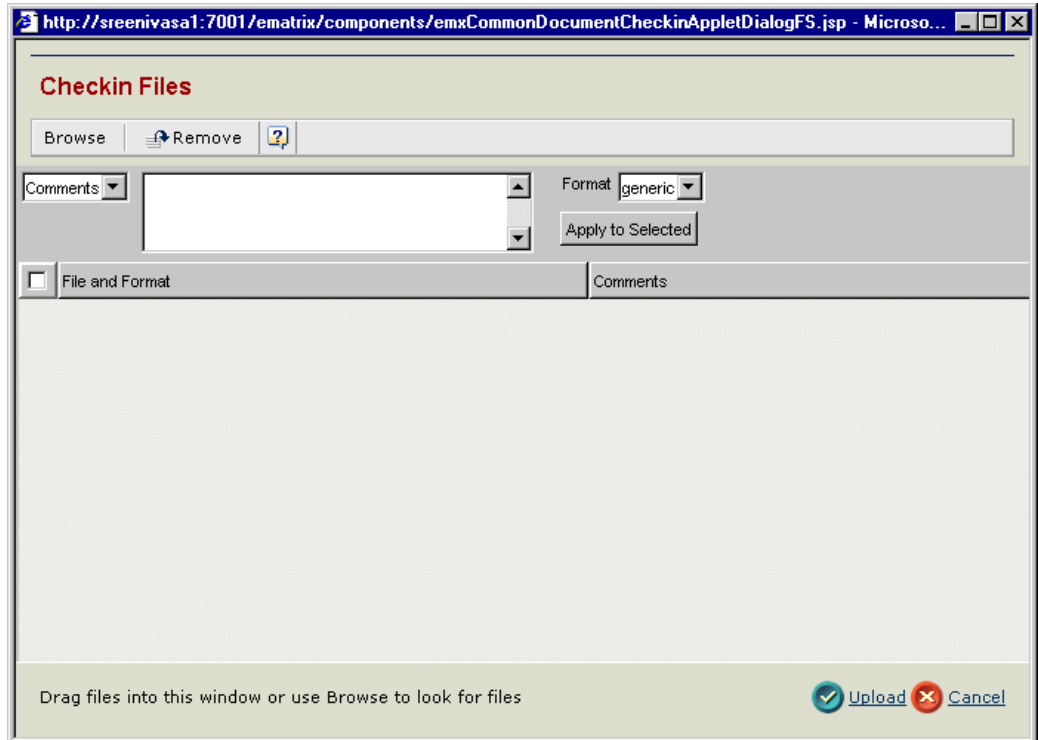
If you are using the Applet, see [Uploading Files with the Applet](#).

If you are not using the Applet, see [Uploading Files without the Applet](#).

Uploading Files with the Applet

You can upload multiple files if you have installed the upload Applet. You can checkin files by dragging and dropping them from Windows Explorer or by selecting them individually.

Your system administrator must enable the checkin applet. If the applet is not enabled, you will see the standard checkin page, which is described in [Uploading Files without the Applet](#).



1. Select individual or multiple files.
 - To select files *individually*, click **Browse**. Select the file you want from the file navigator dialog.
The file name appears in the Checkin Files page.
 - To checkin *multiple* files by dragging and dropping, open Windows Explorer or another file navigation window. Select one or more files from the file navigation window and drag them to the Checkin Files page.
The file names appear in the Checkin Files page.
2. For each file, type a title and select a format. To select the same format for all files, select the Format from the drop-down menu at the top of the page and click **Apply to Selected**.
3. Click **Upload**.

Uploading Files without the Applet

If the checkin applet is not installed you must select files individually.

The screenshot shows a web browser window titled "http://qechrh103:8080/ematrix/components/emxCommonDocumentCheckinDialogFS.jsp - Microsoft Internet Explorer". The main content area is titled "Checkin Files" and contains a search bar with a question mark icon. Below the search bar, a note states "Fields in red italics are required". The interface features a table with two columns: "File | Format" and "Comments". There are four rows in the table, each with a text input field for the file name, a "Browse..." button, a dropdown menu currently set to "generic", and a text area for comments with up and down arrow controls. At the bottom right of the form, there are "Done" and "Cancel" buttons with checkmark and X icons respectively.

1. For each file, click **Browse** and navigate to the file you want to check in.
2. Select the format for each file by selecting the format from the drop-down menu.
3. Type any Comments about each file.
4. When finished, click **Done**.

Viewing Properties for a Document

A document's properties provide information about a document's attributes.

To view document properties

1. Select **Properties** from the category list for a document.

Doc-0000001: Properties

Actions  	
Name	Doc-0000001
Revision	1
Type	Generic Document
Title	Doc-0000001
Policy	Controlled Production Release Rev2
Owner	Everything, Test
Approver	Reviewer, Test
State	Create
Locked	
Description	
Vault	eService Production
Originated	Feb 12, 2004
Checkin Reason	
Created On	Mar 6, 2004

The Document Properties page contains details entered when the document was created or modified. For details on specific fields, see [Creating a New Document](#).

2. You can perform any of these actions on the Properties page:

- To edit the properties of a document, click **Edit Details** from the page Actions menu. See [Editing Details about a Document](#).
- To copy this document to a new document, click **Copy** from the page Actions menu. See your application documentation for using the Copy page.
- To subscribe to the document, click **Subscribe** from the page Actions menu. See [Subscribing to a Document](#).
- To lock the document, click **Lock** from the page Actions menu. The lock icon will appear for this document.

- Use the category list to view more information about the document:

Category List	Description	For details, see:
Approvals	Lists the states and approvals for a document.	See the approvals page for your application.
Properties	Shows the properties for the document.	Viewing Properties for a Document
Document Sheets	Lists the document sheets for the document.	Viewing Document Sheets
History	Shows history information about the document.	<i>AEF User Guide.</i>
Lifecycle	Shows the states for the document, including its current state.	<i>AEF User Guide.</i>
Where Used	Shows the objects that contain the document.	See <i>Document Central User Guide.</i>
File Versions	Shows version information for the document.	Viewing File Versions
Revisions	Shows revision information	Viewing Document Revisions

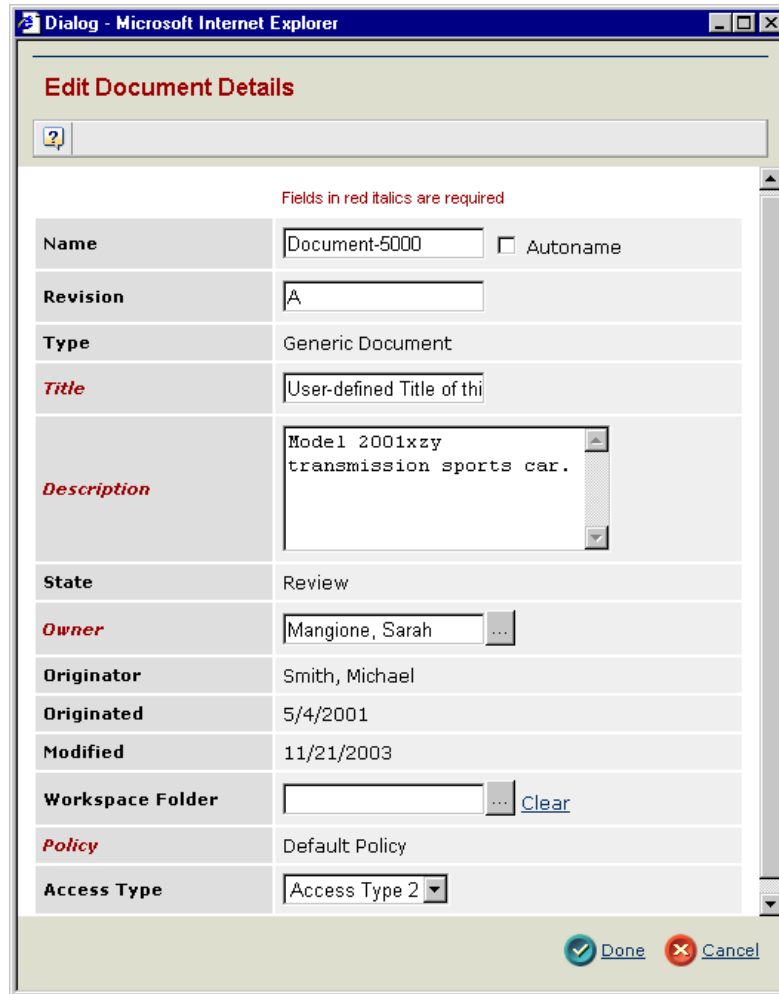
Editing Details about a Document

You can edit information about a document.

To edit details about a document

- On the Properties page for a document, click **Edit Details** from the page Actions menu

The Edit Document Details page opens.



2. Use the Edit Document Details page to make changes. For details on specific fields, see [Creating a New Document](#).
3. When you have modified all necessary fields, click **Done**.

Viewing Files for a Document

The Files page for a document shows information about files checked into a document.

To work with files attached to a document

1. Select a document from the document or content list page.

The Files page for the selected document shows the following information:

Doc-0000001: Files

File Name	Ver	Originated	Comments	Owner	Format	File Size	Actions
emxChangeTaskStateProcess.jsp	1	Feb 12, 2004 7:26:55 PM		Test Everything	generic	5560	

Lock—The icon appears if the file is locked.

File Name—The name of the file.

Ver—The file version identifier. Clicking the version identifier shows file versioning information. See [Viewing File Versions](#).

Originated—The date and time of file creation.







Comments—Any comments about the file.

Owner—The owner of the file.

Format—The format of the file.

File Size—The size of the file.

Actions—The following icons represent the allowable actions you can perform on the file:

Icon	Name	Action
	Download	To download one or more files to your local machine. If the  icon appears below the download icon, the file is locked from being downloaded. Navigate to the folder or directory you want to contain the file. Multiple files are downloaded in a single zip file.
	View	To view the file in a registered viewer.
	Checkout and Lock	To checkout one or more files to your local machine and lock the files from other users who cannot unlock it. Navigate to the folder or directory you want to contain the file.
	Checkin	To checkin and unlock one or more files. See either Uploading Files with the Applet or Uploading Files without the Applet .
	Unlock	Unlocks the file, if locked.

2. Upload one or more files by selecting **Upload** from the page Actions menu. See either [Uploading Files with the Applet](#) or [Uploading Files without the Applet](#).
3. Update a file by selecting **Update Files** from the page Actions menu. See [Updating a File](#).
4. Download a file by clicking its check box and then clicking the Actions menu and selecting **Download**. Multiple files are downloaded in a single zip file.
5. Check Out a file by clicking its check box and then clicking the Actions menu and selecting **Check Out**.
6. Unlock a locked file by clicking its check box and then selecting **Unlock** from the page Actions menu.
7. Delete this version of the file by clicking the check box for the file and then selecting **Delete This Version** from the page Actions menu.
8. Delete all versions of the file by clicking the check box for the file and then selecting **Delete All Versions** from the page Actions menu.

- Use the category list to view additional information about the files:

Category List	Description	For details, see:
Approvals	Lists the states and approvals for a document.	See the approvals page for your application.
Properties	Shows the properties for the file.	Viewing File Properties
Document Sheets	Lists the document sheets for the document.	Viewing Document Sheets
History	Shows history information about the document.	<i>AEF User's Guide.</i>
Lifecycle	Shows the states for the document, including its current state.	<i>AEF User's Guide.</i>
Where Used	Shows the objects that contain the document.	<i>Document Central User's Guide</i>
File Versions	Shows version information for the document.	Viewing File Versions
Revisions	Shows revision information	Viewing Document Revisions



Viewing File Properties

You can view the properties of a file, which includes revision, policy, and vault information.

To view file properties

- From the files listing page, click the name of a file.

251078161204249: Properties

Actions ▾  	
Name	251078161204249
Revision	1
Type	Generic Document
Title	k2ug_Assessment.fm
Policy	Version
Owner	Everything, Test
Approver	
State	Exists
Description	
Vault	eService Production
Originated	Mar 1, 2004

2. To make any changes, click **Edit Details** on the page Actions menu. See [Editing Details about a File](#).

Editing Details about a File

You can change the owner of a file and add comments.

To edit file details

1. From a file Properties page, click **Edit Details** from the page Actions menu.

MatrixOne - Microsoft Internet Explorer

41078759326296 : Edit Details

Fields in red italics are required

File	matrix.properties
Version	1
Format	generic
File Size	3322
<i>Owner</i>	Test Everything ...
Originated	Mar 8, 2004 10:22:06 AM
Modified	Mar 8, 2004 10:22:06 AM
Comments	<input type="text"/>

Done Cancel

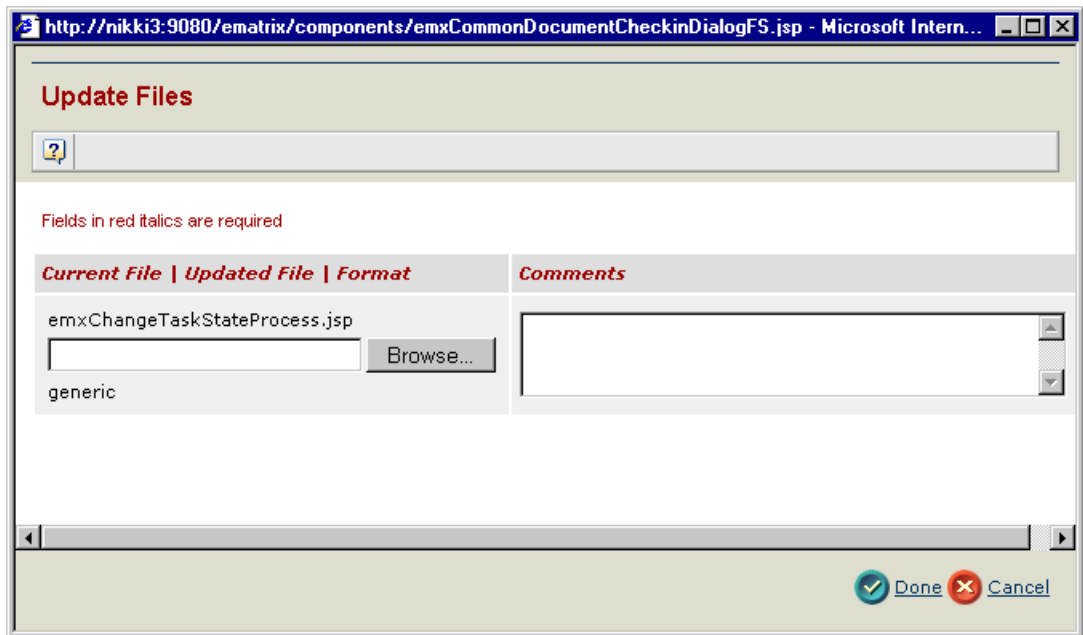
2. Change the Owner.
3. Add any Comments.
4. Click **Done**.

Updating a File

You can update a file and increment its version by selecting a file from your file system.

To update a file

1. Click  to update the file or click **Update File** from the page Actions menu.



2. Click **Browse** and navigate to the updated file.
3. Type any Comments.
4. Click **Done**.

Viewing File Versions




The File Versions page for a document shows information about the versions for each file checked into the document.

To view file versions

1. Click **File Versions** in the category list for the file listing.

Doc-0000001 rev:1: File Versions

Title: Doc-0000001

Ver	File Name	Originated	Comments	Owner	Format	File Size	Actions
1	 emxChangeTaskStateProcess.jsp	Feb 12, 2004 7:26:55 PM		Test Everything	generic	5560	 

Ver—The version identifier.

File Name—The name of the file.

Originated—The date and time of the file creation.




Comments—Any comments about the file.

Owner—The owner of the file.

Format—The file format.

File Size—The size of the file.

Actions—The following icons represent the allowable actions you can perform on the file version:

Icon	Name	Action
	Download	To download one or more files to your local machine. If the  icon appears below the download icon, the file is locked from being downloaded. Multiple files are downloaded in a single zip file.
	View	To view the file in a registered viewer.

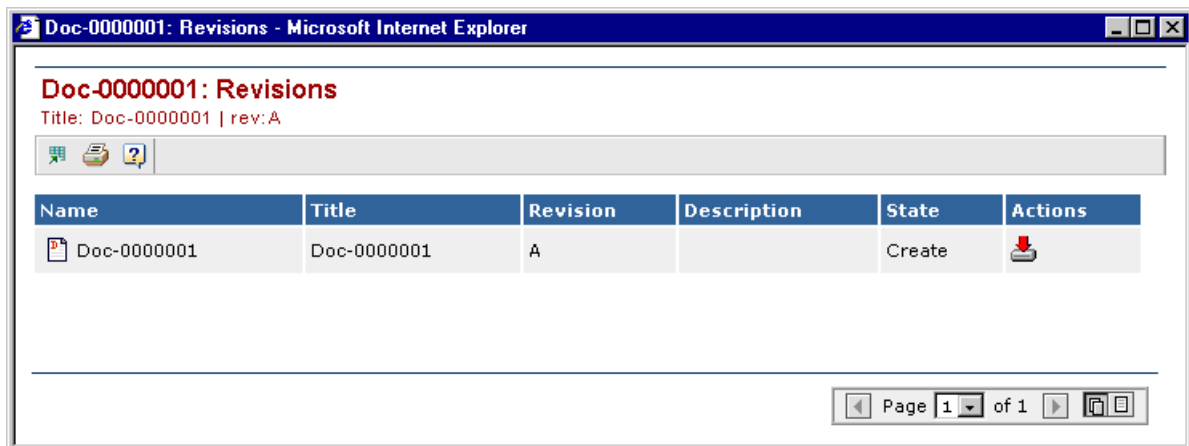
Viewing Document Revisions

Document revisions are done according to the policy for the document. Revising a document causes the document’s revision to be incremented.

Document sheets can also have revisions.

To view document or sheet revisions

1. From the document’s Properties page, click **Revisions** in the category list
Or click the **Rev** identifier in a document listing.
The Revisions page lists all revisions.



The page shows the following information for each revision listed:


Name—The name of the document. Click the Name to view its files. See [Viewing Files for a Document](#).

Title—The title of the document.

Revision—The revision identifier.

Description—A description of the revision.

State—The state of the document revision.


Actions—Click the Download icon  to download one or more files to your local machine. Multiple files are downloaded in a single zip file.

2. To revise this revision, select **Revise** from the page Actions menu.
3. To revise with files, select **Revise with Files** from the page Actions menu.

Viewing Document Sheets

In Document Central a document can contain one or more sheets, which may have files.

To view document sheets

1. From the document's category list, click **Document Sheets**.
You see a list of document sheets.
2. You can do one of the following:
 - To create a new sheet, click **Create New** from the page Actions menu. See [Creating a Document Sheet](#).
 - To print a sheet, check it and click **Print** from the page Actions menu.
 - To delete a sheet, check it and click **Delete** from the page Actions menu.
 - To view the details of a sheet, click the **Name** of the sheet or select the  button at the end of the sheet entry. To view the properties of a document sheet, see Document Central documentation.

Creating a Document Sheet

In Document Central, creating a sheet involves creating its attributes and adding files.

To add sheet attributes


1. Click **Create New** from the Action menu on the page that lists document sheets.
2. Enter the following information:
 - Name**— Type a name for the sheet. Names are case-sensitive and spaces are allowed. You can use complete names rather than contractions, making the terminology in your system easier for people to understand. Generally, name lengths can be a maximum of 127 characters. Leading and trailing spaces are ignored.
 - Type**—The type is Document Sheet.
 - Revision**—The revision is defaulted. You can enter a higher revision by typing any valid alphanumeric character for the revision, as long as it is consistent with the sequence specified in the policy.


You cannot create an object with the same type, name, and revision as another object.

Title—Type a title for the sheet.

Sheet Number—Used to identify multiple sheets.

Policy—click  and select the policy for the sheet.

Owner—This defaults to your user name. To select another person as Owner, click  and select the person.

Created—This field defaults to today's date. If you need to change this date, click  and then select another date.

Description—Type a description of the sheet.

You may also see one or more custom attributes for the sheet. If a custom attribute field name appears in red, it is a required field.

3. Click **Next** to add files.

If you are using the Applet, see [Uploading Files with the Applet](#).

If you are not using the Applet, see [Uploading Files without the Applet](#).

Downloading a File Package

All users with read access to an EBOM's component parts can generate and download a package of files connected to a part and its associated objects. The download file is a .zip file for Windows or UNIX.

This is a System Administrator configuration option, so you may not see the Download Package link.

The Download Package wizard displays a table showing all document objects (part, CAD model, CAD drawing, drawing print, reference document) for which you have read access and that are related to the parent part, to the level specified. It also shows files that are checked in to those objects. You can:

- Specify levels to include in the package.
- Select specific documents for the package.
- Download the package to your computer.

To download the file package

1. Access a part Bill of Materials page. See your application documentation for viewing a part bill of materials.
2. Click **Download Package** from the page toolbar.

The Download Package wizard opens.

Step 1 of 2: Specify Levels	
Fields in red italics are required	
Part	PT-5000-01 rev 3
<i>Levels</i>	<input type="text"/>
<input type="checkbox"/> or All Levels	

3. Type the number of levels of associated objects you want to choose files from, or click **All Levels** to include all levels below the selected part.

4. Click **Next**.

The Select Documents to Download page shows all document objects related to the part to the specified level, including files checked in to those objects.

Step 2 of 2: Part-5000: Select Documents to Download
Showing 4 Levels

<input type="checkbox"/>	Level	Name	Rev	Type	Description	State	Qty	U of M	Size
<input type="checkbox"/>	2	Front Gear	2	Part	Plasma drive system for a Warp 5 plus drive system.	Preliminary	2	EA	
<input type="checkbox"/>	3	CAD Drawing-5000	1	CAD Drawing	Plasma drive system for a Warp 5 plus drive system.	Preliminary	2	EA	
<input checked="" type="checkbox"/>		File-5000	2	File	Plasma drive system for a Warp 5 plus drive system.	Preliminary	2	EA	200 K
<input type="checkbox"/>	1	Differential Gear Box	2	Part	This is the description for this part.	Preliminary	2	EA	
<input checked="" type="checkbox"/>		File-5001	2	File	Plasma drive system for a Warp 5 plus drive system.	Preliminary	2	EA	530 K
<input type="checkbox"/>	1	CAD Drawing-5001	1	CAD Drawing	Plasma drive system for a Warp 5 plus drive system.	Preliminary	2	EA	
<input checked="" type="checkbox"/>		File-6000	2	File	Plasma drive system for a Warp 5 plus drive system.	Preliminary	2	EA	200 K
<input type="checkbox"/>	1	CAD Model-5001	1	CAD Model	Plasma drive system for a Warp 5 plus drive system.	Preliminary	2	EA	
<input checked="" type="checkbox"/>		File-6001	2	File	Plasma drive system for a Warp 5 plus drive system.	Preliminary	2	EA	530 K

Previous
 Done
 Cancel

5. Check each file that you want to include in the package to download. Check boxes for items other than files are gray and cannot be selected.
6. Click **Done** to generate the package.
The standard Windows Save As window opens.
7. Enter a name for the .zip file and specify the location where you want the file to be saved on your computer, then click **Save**.

Issue Management

Issue Management Overview

The Issue Management feature provides a flexible set of issue creation, tracking, and resolution workflows. It is designed to automate the communication and resolution of business issues related to items or suppliers.

Issue Management gives users the ability to report issues against specific products, projects, parts, or other business objects. Issues are ad-hoc problems that are identified and recorded during the lifecycle of any object in a MatrixOne application.

Working with Issue Management

The following topics are covered:

- [Listing Issues](#)
- [Creating a New Issue](#)
- [Viewing an Issue in PowerView](#)
- [Viewing an Issue's Properties](#)
- [Editing Details About an Issue](#)
- [Closing an Issue](#)
- [Changing an Issue's Type](#)
- [Selecting an Issue Type](#)
- [Viewing an Issue's Assignees](#)

Listing Issues

All users can list issues. However, only the Issue Manager can change the owner or the type for an issue when in the “Create” state.

To list issues






1. Click **My Desk > Issues > My Issues**.

For objects that have issues, you can also access issues from the Properties page for the object by clicking **Issues** in the category list.


The Issues page appears, listing all issues.

Issues All

Actions

	Name	Type	Description	State	Escalation Required	Estimated		Actual		Owner	Priority	Edit
						Start	Finish	Start	Finish			
<input type="checkbox"/>	 Issue-5000	Issue	Description for this Issue.	Assign	No	12/1/2002	12/31/2002	12/1/2002	12/31/2002	Schmidt, Becky	Medium	<input type="button" value="Edit"/> <input type="button" value="PowerView"/>
<input type="checkbox"/>	 Issue-5001	Issue	Description for this Issue.	Review	Yes	12/1/2002	12/31/2002	12/1/2002	12/31/2002	Schmidt, Becky	Low	<input type="button" value="Edit"/> <input type="button" value="PowerView"/>
<input type="checkbox"/>	 Issue-5002	Issue	Description for this Issue.	Assign	No	12/1/2002	12/31/2002	12/1/2002	12/31/2002	O'Brien, Keiko	Low	<input type="button" value="Edit"/> <input type="button" value="PowerView"/>
<input type="checkbox"/>	 Issue-5003	Issue	Description for this Issue.	Review	No	12/31/2002	12/1/2002	12/31/2002	12/1/2002	Archer, Jon	Medium	<input type="button" value="Edit"/> <input type="button" value="PowerView"/>
<input type="checkbox"/>	 Issue-5004	Issue	Description for this Issue.	Active	No	12/1/2002	12/31/2002	12/1/2002	1/25/2003	Merriwhether, Travis	High	<input type="button" value="Edit"/> <input type="button" value="PowerView"/>

For each issue, the page lists:

Status Icon —Represents any slippage between the estimated start and finish dates. The red, yellow, and green status icons are configurable. For example, a red icon might display for a high slip value, and a green icon for no slippage.

Name—The name of the issue, which is auto-generated. Click on the name to view its properties, or click at the end of the row to view the PowerView page in a new browser window. See [Viewing an Issue in PowerView](#).

Type—The type for the issue.

Description—The description of the issue.

State—The current state of the issue.


Escalation Required—Whether the issue requires escalation.

Estimated Start / Finish—The estimated start and finish dates for the issue resolution.

Actual Start / Finish—The actual start and finish dates for the issue resolution.

Owner—The owner of the issue.

Priority—The priority of the issue.

2. To edit details about an issue, click  at the end of the row. See [Editing Details About an Issue](#).
3. Use the **Actions** menu on the page toolbar to work with the issues as needed:
 - To create a new issue, select **Create New**. See [Creating a New Issue](#).
 - To delete an issue, check it and select **Delete**. Only users with delete access on specific states in the policy have the ability to delete the issue.
 - To change the owner of an issue, check it and select **Change Owner**. Use the Search page to locate the new owner. Only an Issue Manager can change the owner of an issue.

Creating a New Issue

All users can be given access to create an issue related to an item. Once created, an issue is auto-named according to the naming conventions set up by the Issue Manager.

To create a new issue for an item

1. Click **MyDesk > Issues > Create Issue**.

Or from the Actions menu on the Issues list page, click **Create New**.

The Create New Issue page appears.

Create New Issue

Fields in red italics are required

Type: Issue

Description: [Text Area]

Reported Against: [Text Box]

Escalation Required: Yes No





Estimated Start: [Text Box] (mmm dd, yyyy) [Calendar Icon]



Estimated Finish: [Text Box] (mmm dd, yyyy) [Calendar Icon]

Priority: Low

Resolution Recommendation: [Text Area]

Buttons: Clear All, Create Issue, Done, Cancel

2. In the **Type** text box, leave the value as Issue unless there is another Type. If another type is defined for creating issues, click  to select that type. See the *AEF User Guide* for using the Type selection page.
3. In the **Description** text box, type a description of the issue.
4. For **Reported Against**, click  to search for the object you want to create the issue for.
5. If the issue requires upper management support for resolution, for **Escalation Required** click **Yes**.
6. In **Estimated Start**, click  and select the date on which issue resolution will begin.
7. In **Estimated Finish**, click  and select the date on which issue resolution will begin.
8. Select the **Priority** for the issue. Values are High, Medium, Low, or Pre-assigned.

9. If you have a recommendation for resolving the issue, type its description in **Resolution Recommendation**.
10. If you have a procedure for reproducing the problem causing the issue, type it in **Steps to Reproduce**.
11. To select a category for the issue, click  in **Issue Category Classification**.
12. To select the company that is reporting the issue, click  in **Reporting Organization**.
13. If the property to display the policy list is set to “True” in the properties file, select a **Policy** from the drop-down list.
14. Select the **Vault** to contain the issue.
15. When finished, select an option:
 - To create the issue and exit the page, click **Done**.
 - To create the issue and leave the data on the page (for creating another issue), click **Create Issue**.
 - To clear the data on the page and start over, click **Clear All**.
 - To close the Create New Issue window, click **Cancel**. All issues previously created are committed.


The issue is created and auto-named. At this point, any user can read the issue. To list all issues, see [Listing Issues](#).

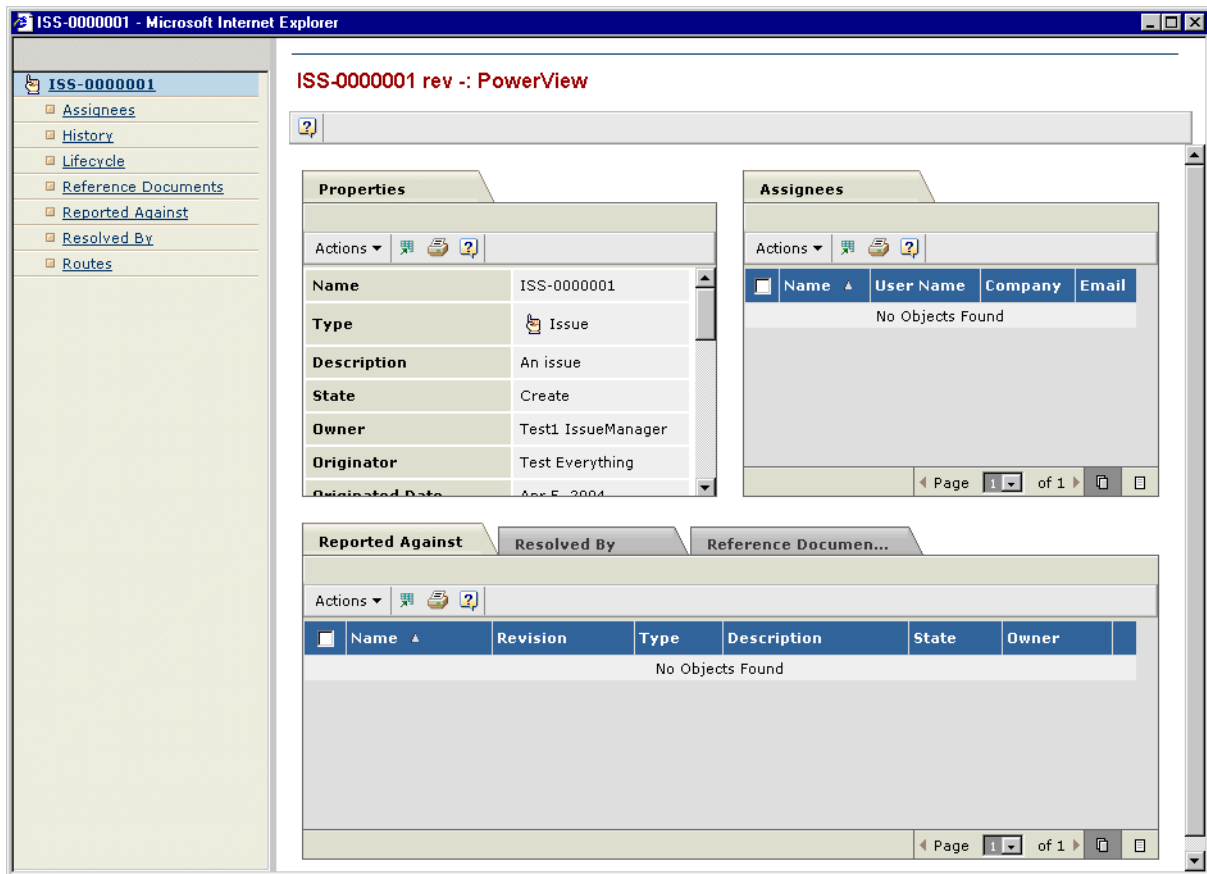
Viewing an Issue in PowerView

The PowerView page for an issue aggregates information about an issue onto one page and provides access to related items such as properties, assignees, reference documents, reported against items, and resolved by items. The PowerView is configurable by your Matrix Business Administrator, so you may see different information than what is described here.

In many cases, the tabs shown on the PowerView page correspond to items in the issue category list 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.

To view information for an issue

1. From the page that lists issues, click  at the end of the issue row. Or you can click the issue's Name.



2. Use the category list or PowerView tabs to view more information about the issue:

Category/Tab	Description	For details, see:
Properties	Shows the properties for an issue.	Viewing an Issue's Properties
Assignees	Shows persons assigned to the issue.	Viewing an Issue's Assignees
History	Shows a log of all the actions that have occurred for the issue.	See the <i>AEF User Guide</i> .
Lifecycle	Lets people with the appropriate access change the state for the issue.	See the <i>AEF User Guide</i> .
Reference Documents	Shows any documents associated with the issue.	Viewing Documents and Content in Chapter 3.
Reported Against	Shows the objects the issue is reported against.	Viewing Reported Against Objects
Resolved By	Shows the objects used to solve the issue.	Viewing Resolved By Objects
Routes	Shows routes involving the issue and provides access to create a new route.	See Listing Routes .

Viewing an Issue's Properties

The properties for an issue show basic details about the issue.

To view and issue's properties

1. Scroll down the Properties channel in PowerView.

The following attributes make up an issue's properties:

- **Name.** The auto-generated name.
 - **Type.** The issue type, used for classification.
 - **Description.** A description of the issue.
 - **State.** The current state of the issue.
 - **Owner.** The owner of the issue.
 - **Originator.** The person who created the issue.
 - **Originated Date.** The date on which the issue was created.
 - **Modified Date.** The date on which the issue was last modified. If not modified, this date is the same as the Originated Date.
 - **Escalation Required.** Indicates whether the issue requires upper management support for resolution.
 - **Estimated Start.** The estimated date on which the issue resolution will begin.
 - **Estimated Finish.** The estimated date on which issue resolution will end.
 - **Actual Start.** The actual start date.
 - **Actual Finish.** The actual finish date when the issue should close.
 - **Priority.** Values are High, Medium, Low, or Pre-assigned.
 - **Resolution Recommendation.** A recommendation for resolving the issue.
 - **Action Taken.** A description of any action taken to resolve the issue.
 - **Resolution Statement.** A description of the actual resolution.
 - **Steps to Reproduce.** The procedure for reproducing the problem causing the issue.
 - **Category.** Determines the issue classifications for this issue.
 - **Classification.** Determines the Issue Manager responsible. Based on Category and Classification, issue managers can be assigned and notified automatically.
 - **Reported Organization.** The company associated with the issue.
 - **Policy.** The policy that governs the issue's lifecycle.
 - **Vault.** The vault containing the issue.
2. Use any of the following commands from the page Actions menu to work with the issue.
 - **Edit Details.** To edit the properties listed, including changing the owner, priority, and start and finish times. See [Editing Details About an Issue](#).
 - **Change Type.** To change the type for the issue. See [Changing an Issue's Type](#).
 - **Close.** To close the issue and identify the action taken and the resolution. See [Closing an Issue](#).

Editing Details About an Issue

You can edit information about an issue.

To edit details about an issue

1. On the PowerView page for an issue, click **Edit Details** from the page Actions menu

The Edit Issue Details page opens.

Dialog - Microsoft Internet Explorer

Edit Issue Details

Fields in red italics are required

<i>Name</i>	Issue-5000
<i>Type</i>	Issue
<i>Description</i>	<input type="text" value="This is a description of the Impact Analysis"/>
<i>State</i>	Assign
<i>Owner</i>	<input type="text" value="Schmidt, Becky"/>
<i>Originator</i>	Leeman, Julian
<i>Originated Date</i>	9/1/2002
<i>Modified Date</i>	9/1/2002
<i>Escalation Required</i>	<input checked="" type="radio"/> Yes <input type="radio"/> No
<i>Estimated Start</i>	<input type="text" value="12/1/2002"/> (mm/dd/yyyy)
<i>Estimated Finish</i>	<input type="text" value="12/31/2002"/> (mm/dd/yyyy)
<i>Actual Start</i>	12/1/2002

2. Change one or more of the following fields:

Description. The description of the issue.

Owner. The owner of the issue. Only an Issue Manager can change the owner.

Escalation Required. Indicates whether the issue requires upper management support for resolution.

Estimated Start. Click and change the date on which issue resolution will begin.

Estimated Finish. Click and change the date on which issue resolution will end.

Priority. Values are High, Medium, Low, or Pre-assigned.

Resolution Recommendation. Type an updated recommendation for resolving the issue

Action Taken. Type any action taken to resolve this issue.

Resolution Statement. Type a description of the actual resolution.

Steps to Reproduce. Type any changes for reproducing the problem causing the issue.

Policy. Change the policy governing the issue.

3. When finished, click **Done**.

Closing an Issue

To close an issue the Issue Manager describes the action taken and the resolution statement.

To close an issue

1. From the Actions menu on the PowerView page for the issue, click **Close**.
The Close Issue page opens.

MatrixOne - Microsoft Internet Explorer

Close Issue

?

Fields in red italics are required

Name	ISS-0000001
<i>Action Taken</i>	<input type="text"/>
<i>ResolutionStatement</i>	<input type="text"/>

Done Cancel

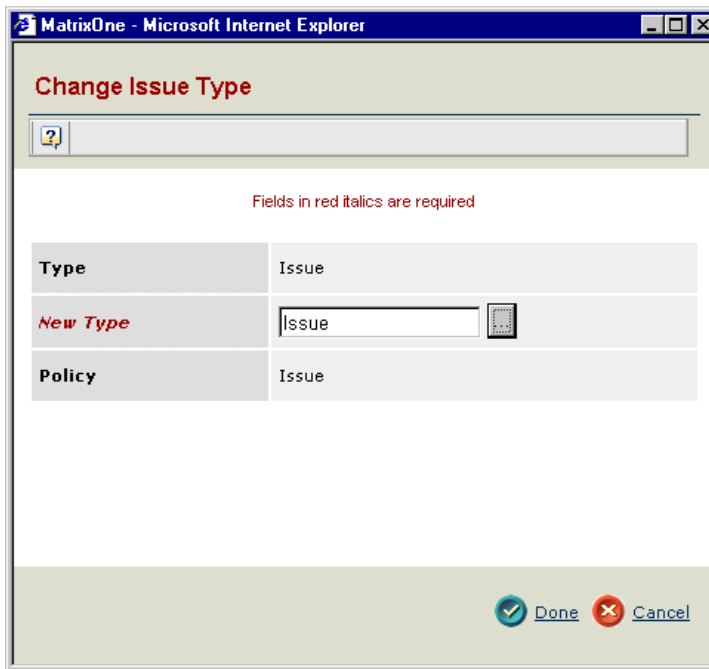
2. Type the **Action Taken** to solve the issue.
3. Type a **Resolution Statement** to describe why the issue can be closed.
4. Click **Done**.


Changing an Issue's Type

You can change an issue's type to reclassify an issue.

To change an issue's type


1. From the Actions menu on the PowerView page for the issue, click **Change Type**.
The Change Issue Type page opens.

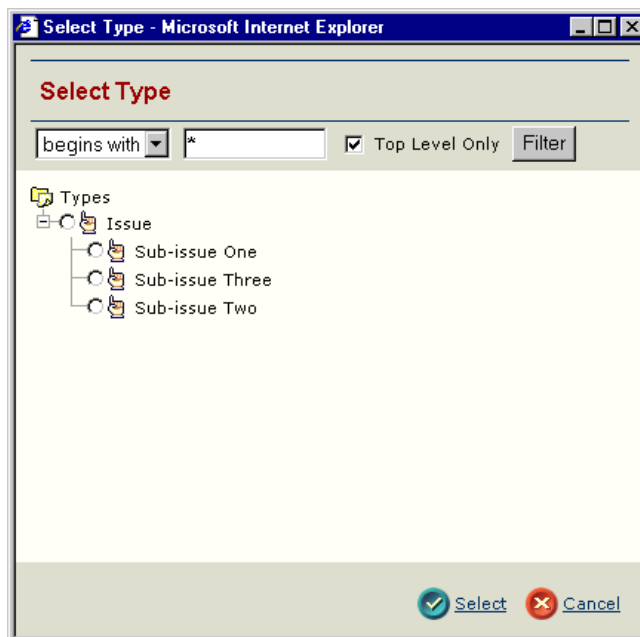


2. In **New Type**, click  to select the new type. See
3. Click **Done**.

Selecting an Issue Type

To select a new type for an issue

1. Click  next to New Type on the Change Issue Type screen. The Select Type page opens.



2. Select the Type by clicking its radio button. To expand the tree click the “+” sign. You can search for a type by name by using the following values in the drop-down menu:

begins with

ends with

contains

equals

Then type a value in the second field that identifies part of or the whole name. The character * is the wildcard. You can specify that the search be performed on types that are **Top Level Only**. Click the **Filter** button to perform the name search.

3. Click **Select**.

Viewing an Issue’s Assignees



The owner of an issue can assign the issue to any persons in the company. When a user is assigned to an issue, an e-mail notification is sent to the user.

To view assignees

1. From the issue category list or PowerView tab, click **Assignees**.

You see a list of persons assigned to the issue.

ISS-0000001: Assignee

<input type="checkbox"/>	Name ▲	User Name	Company	Email
<input type="checkbox"/>	 SupplierQualityEngineer2, RO	RO_SQE2	TestRetro_Outfitters	rose@retrooutfitters.com
<input type="checkbox"/>	 QualityAdministrator, Host	Host_QualityAdmin1	Company_Name	hqa@host.com

2. To add another assignee, click **Add Existing** from the page Actions menu. Search for and then select the new assignee.
3. To remove an assignee, click the check box for each assignee you want to remove and then click **Remove** from the page Actions menu.

A message is displayed, asking you to confirm that you want to remove the assignee(s) from the issue. Click **Yes** to confirm the removal or click **No** if you want to keep the assignee associated with the issue.

4. To see details about the assignee, click the person’s Name.

Viewing Reported Against Objects




You can view information about objects that the issue is reported against. The issue assignee or owner has the ability to attach objects reported against the issue.

To view reported against objects

1. From the issue category list or PowerView tab, click **Reported Against**.

You see a list of objects reported against the issue.

Issue-5000: Reported Against

<input type="checkbox"/>	Name	Rev	Type	Description	State	Owner
<input type="checkbox"/>	 Monitors	2	Feature	Monitors	Review	Henson, Frank
<input type="checkbox"/>	 Keyboard	3	Feature	Defines the type of Keyboards	Complete	Ollfon, Onstey
<input type="checkbox"/>	 Hard Drives	2	Feature	Defines the kind of Hard Drives	Assign	Ralston, Thomas

For each object, the page lists:

Name—the name of the object. Click the Name to view detailed information about the object.

Rev—the revision identifier.

Type—the object type.

Description—a description of the object.

State—the current state of the object in its lifecycle.

Owner—the object owner.

2. To add another object, click **Add Existing** from the page Actions menu. Search for and then select the new object.
3. To remove an object, click the check box for each object you want to remove and then click **Remove** from the page Actions menu.

A message is displayed, asking you to confirm that you want to remove the object(s). Click **Yes** to confirm the removal or click **No** if you want to keep the object associated with the issue.

4. To see details about an object, click the object's Name.

Viewing Resolved By Objects



You can view information about objects that were used to solve the issue. The issue assignee or owner has the ability to attach objects used in issue resolution.

To view resolved by objects

1. From the issue category list or PowerView tab, click **Resolved By**.

You see a list of objects used in issue resolution.

ISS-0000001: Resolved By

<input type="checkbox"/>	Name ▲	Revision	Type	Description	State	Owner
<input type="checkbox"/>	 ISS-0000002	-	Issue	Design Issue	Create	Test IssueManager
<input type="checkbox"/>	 ISS-0000003	-	Issue	Design Issue	Create	Test IssueManager

For each object, the page lists:

Name—the name of the object. Click the Name to view detailed information about the object.

Revision—the revision identifier.

Type—the object type.

Description—a description of the object.

State—the current state of the object in its lifecycle.

Owner—the object owner.

2. To create an issue that resolves an issue, click **Create Issue** from the page Actions menu.
3. To add another object, click **Add Existing** from the page Actions menu. Search for and then select the new object.
4. To remove an object, click the check box for each object you want to remove and then click **Remove** from the page Actions menu.
A message is displayed, asking you to confirm that you want to remove the object(s). Click **Yes** to confirm the removal or click **No** if you want to keep the object associated with the issue.
5. To see details about an object, click the object's Name.

Overview of Routes

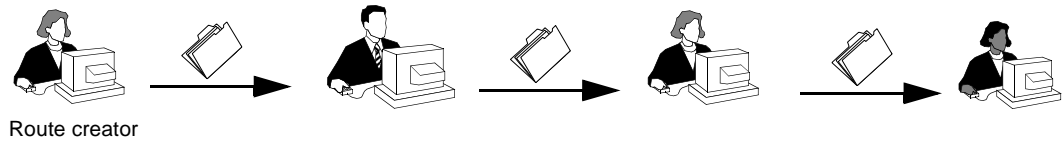
A *route* is a set of tasks that users complete in order to accomplish a business activity. Routes can contain content that helps the route members complete their assigned tasks. For example, you might create a route to get a design specification reviewed and approved. You could include the design specification and other related documentation in the route. Some route members would have tasks for reviewing and commenting on the spec, others would have tasks for approving the spec.

The route creator defines each task to be completed and for each task, specifies:

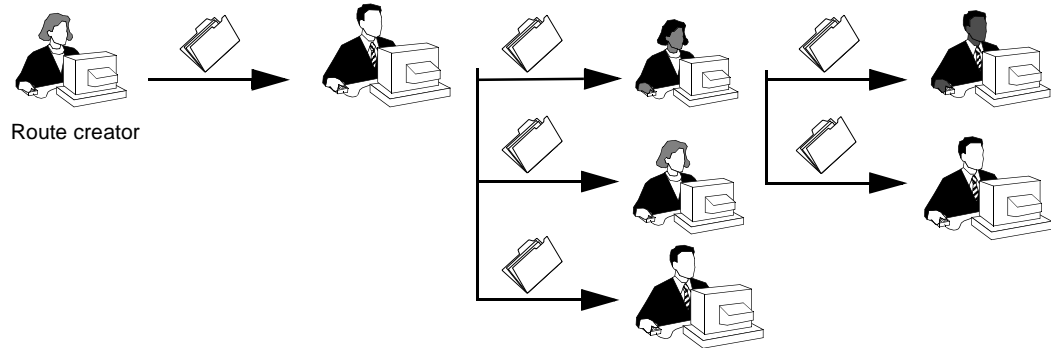
- the order in which the tasks should be completed
- the name of the task
- the route member who should complete each task, called the task assignee; this can be a person or a role
- optionally, when each task is due
- the action the task assignee should perform, such as approve, comment, investigate
- specific instructions for how the person should complete the task
- whether the task assignee can delegate the task to someone else
- whether the route creator needs to review the task before it is completed

More than one task can be active within a route at one time or tasks can become active sequentially, after each member completes a task. If more than one task is active at once, the route creator can specify whether only one task needs to be complete or they all must be complete before the next set of tasks become active.

You can create routes with tasks that should be completed sequentially . . .



or with tasks that should be completed simultaneously.



When the route creator starts a route, the system activates all tasks with an order number of 1 and notifies the assignee for each task. If the assignee is a group or role, one member of the group or role must accept the responsibility for the task. That person then becomes the task assignee. The assignees can then access the task to see the instructions, view and edit content in the route (as allowed based on the access they have for each content item), and enter comments and an approval status (as allowed/required based on the actions specified by the route creator). When the assignees mark the task as complete, the system creates a task for the next person in the route and so on.

You can simplify the process of creating similar routes by saving routes as templates. A route template contains the frequently reused components of a route, such as the route description, members, task order, and instructions.

Listing Routes

You can get lists of routes that include:

- all the routes you created and routes you are included in
- all routes that include a particular item for which you have access, for example, all routes that include a specific document or risk

If Team Central is installed, the route lists from within a workspace for Workspace Leads include all routes for the workspace, even those they are not included in.

To list routes

1. To list the routes that you created and that you are assigned a task for, click **Routes>My Routes** from the My Desk menu. This list also includes routes that were created in other installed MatrixOne applications.

Or

From the category list of the specific object you want to see routes for, click **Routes**. The Routes page opens, showing all routes you are included in that relate to the object.

	Name	Description	Route Base Purpose	Status	Due Date	Owner
<input type="checkbox"/>	Route-5000	Product development route	Standard	Started	2/15/2003	Smith
<input type="checkbox"/>	Route-3217	Camshaft Diagram	Standard	Started	11/30/2002	Smith
<input type="checkbox"/>	Route-3216	Circuit Board Change	Standard	Started	5/10/2002	Smith
<input type="checkbox"/>	Route-3215	Jet Engine Turbine Blade	Approval	Finished	2/10/2002	Smith

For each route, the page shows:

Status Icon—Shows the status of the route. A green arrow means all route tasks are on time. A yellow diamond means at least one route task, not including the last task in the route, is late. A red square means the last task is late.

Name—The name of the route. If the owner chose autaname when creating the route, the name contains a prefix and a number. To see details about a route, click its name.

Description—The description the owner entered for the route.

Route Base Purpose—Determines the kind of tasks included in the route.

- Standard—The route can include tasks that require the assignee’s approval or comment or tasks intended only for notification or information.
- Approval—The route includes only tasks that require the assignee’s approval.
- Review—The route includes only tasks that require the assignee’s comment.

Status—Not Started, Started, Stopped, or Finished. Not Started means you began creating the route but didn’t start it yet, so no tasks have been created yet. Only the route creator can access Not Started routes. Started means the route has been started but not all members have completed their tasks. Stopped means a route member has rejected the route (chosen Reject for the task approval status). Finished means all members have completed their tasks for the route.

Scope—The members who can access the route: all, organization, or a specific workspace or project space.

Due Date—The date the final route member is scheduled to complete his or her task. If this date has passed and the final task has not yet been completed, the route status is red.

Completed—The date the final route member completed his or her task.

Owner—The person who created the route.

2. Work with the routes as needed using the links on the Routes page:

- To view information about a route, click its **Name**. See [Viewing Information about a Route](#).
- To create a new route, click **Create Route** or **Route Wizard** from the page Actions menu. See [Creating a Route: Basic Information Only](#) and [Creating a Route: All Route Information](#).
- To set the task escalation, click **Set Task Escalation**. This appears only for the route owner. See [Setting Up Task Due Date Notifications](#).
- To start a route whose state is Not Started, check it and click **Start/Resume Selected** from the Actions menu. See [Starting a Route](#).
- To start a route whose state is Stopped, check it and click **Start/Resume Selected** from the Actions menu. See [Processing Rejected Routes](#).
- To delete a route that you own, check it and click **Delete Selected** from the Actions menu. See [Deleting a Route](#).

Viewing Information about a Route

You can view information about any route that you created or that you are included in. Additionally, you can view routes for an item that you have view access to, even if you are not included in the routes. If Team Central is installed, Workspace Leads can view information for any route for the workspace, even if they are not included in it.

To view information about a route

1. From the My Desk menu, click **Routes>My Routes**.

Or

If you are working within an object, click **Routes** from the object category list.

2. From the Routes page, click the **Name** of the route.

The category list and Properties page for the route opens.

000000004 : Properties	
Actions ▾ [Print] [Help]	
Name	R-0000004
Scope	Workspace : newWS-IE
Template	RouteTemplate-5000
State	Not Started
Description	Ideas for NPI of Product X!
Owner	Smith, Michael
Originated	Jan 5, 2004 1:54:38 PM
Route Base Purpose	Standard
Route Completion Action	Notify Route Owner

Name—The name assigned by the route creator.

Scope—Determines the members that can be assigned tasks for the route.

- **Organization**—The route creator can add only people from his/her own company and one other company.

- **All**—The route creator can add people from any company, including roles and groups.
- **project space**—If Program Central is installed, the scope can be limited to a specific project space. To see information about the project space, click its name.
- **workspace, folder, subfolder**—If Team Central is installed, the scope item can be a workspace, folder, or subfolder. This defines not only the route members, but also the upper limit for content that can be added to the route. For example, if the scope is the workspace, the content can be from any folder or subfolder and the route’s members can be any person added to the workspace. If the scope is a particular folder or subfolder, the content can only be from that folder and any of its subfolders. The routes members can only be people who have at least Read access to the scope folder. To see information about the workspace/folder, click its name.

Template—The name of the template used to create the route, if any. To see information about the template, click its name.

State—Not Started, Started, Stopped, or Finished. Not Started means you began creating the route but didn’t start it yet, so no tasks have been created yet. Only the route creator can access Not Started routes. Started means the route has been started but not all members have completed their tasks. Stopped means a route member has rejected the route (chosen Reject for the task approval status). Finished means all members have completed their tasks for the route.

Description—The purpose or intent of the route.

Owner—The person who created the route.

Originated—The date the route was created. If the route was not started immediately, this could be different from the date and time the route was started.

Route Base Purpose—Determines the kind of tasks included in the route.

- **Standard**—The route can include tasks that require the assignee’s approval or comment, or tasks intended only for notification or information.
- **Approval**—The route includes only tasks that require the assignee’s approval.
- **Review**—The route includes only tasks that require the assignee’s comment.

Route Completion Action—Determines the events that will occur when the route is complete.


- **Notify Route Owner**—When the route is complete (all tasks are completed), the system sends a notification to the route owner.
- **Promote Connected Object**—This option is for routes with content for which the route owner has defined lifecycle block states. If this option is selected, the system automatically promotes the object when the route is completed, assuming no other routes or requirements are blocking promotion. The route owner is also notified of the route completion.

3. Use the Actions menu commands to work with the route:

- To edit the route’s name or description, click **Edit Details**. Only route owners can edit details. See [Editing a Route’s Details](#).
- To set up notifications about potentially late tasks, click **Set Task Escalation**. See [Setting Up Task Due Date Notifications](#).
- To save the route as a template, click **Save As Template**. See [Saving a Route as a Template](#).

- To start the route, click **Start Route**. This is only available for the route owner and when the route has not yet been started. See [Starting a Route](#).
- To request to be notified when a task is completed or content is added to the route, click **Subscribe**. If the route is Finished, this option is not available. See [Subscribing to Events for a Route](#).
- To request that other people be notified when a task is completed or content is added for the route, click **Push Subscriptions**. This is only available for the route owner. See [Pushing Subscriptions](#).
- To resume a route that has been rejected, click **Resume**. This button is available only for routes that have been rejected have a status of Stopped. See [Processing Rejected Routes](#).

4. Use the category list to view more information about the route.

Category	Description	For details, see:
Access	Lists the route members. For Team Central, also lets the route owner set accesses to the route.	Listing Route Members
Content	Shows the content that has been added to the route and lets people with the appropriate access add and remove content.	Listing Content for a Route
Discussions	Lists the discussion threads that are associated with this route.	Listing Discussions for an Item
History	Shows a log of events that have occurred for the route.	Click  on the History page or see AEF Help .
Tasks	Lists the tasks in the route.	Listing Tasks for a Route
Tasks (Graphical)	Shows a graphical display of the tasks in the route and their status.	Listing Tasks for a Route—Graphical View

Determining a Route's Scope

The scope for a route determines who can be assigned tasks in the route, who can access the route, and in some cases, what content can be added to the route. The following are possible values for the route's scope:

- Organization—The route creator can add only people from his/her own company and one other company.
- All—The route creator can add people from any company, including roles and groups.
- project space—If Program Central is installed, the scope can be a specific project space. To see information about the project space, click its name.
- workspace, folder, subfolder—If Team Central is installed, the scope item can be a workspace, folder, or subfolder. This defines not only the route members, but also the upper limit for content that can be added to the route. For example, if the scope is the workspace, the content can be from any folder or subfolder and the route's members can be any person added to the workspace. If the scope is a particular folder or subfolder, the content can only be from that folder and any of its subfolders. The routes members can only be people who have at least Read access to the scope folder. To see information about the workspace/folder, click its name.

If Team Central is installed, and the scope of the route is defined as a workspace or a folder or subfolder, the scope can further limit the access and content of the route. The scope can:

- Limit the content of the route to the content within the scope item or below it in the workspace hierarchy.

For example, if the scope is the workspace, the content can be from any folder or subfolder in the workspace. If the scope is a particular folder or subfolder, the content can only be from that folder and any of its subfolders. So to add content from multiple top-level folders, the route's scope must be the workspace. To add content from different subfolders within a folder, the scope must be at least the folder (and can be the workspace).

You can add files to a route that are not initially in the scope of the route by uploading an external file to the route. However when adding the file, you must place the external file in a folder within the route's scope.

Note that accesses also limit the content that can be added to a route. The people who add content to the route, which is either the creator or route members who have Add access, can only add content from folders that they have at least Read access to.

- Limit the people who can be assigned tasks to workspace members who have Read access to the scope item.

For example, if the scope is a workspace, the task assignees can be any member of the workspace. If the scope is a folder or subfolder, only members who have Read access to the folder or subfolder can be assigned tasks.

- Associate the route with a particular folder, subfolder.

For example, you may want to associate a route with a particular folder because the folder belongs to a project team. A folder-scope route is listed on the Routes page for the workspace and for the folder but not on the Routes page for other folders in the workspace. Associating a route to a folder may be especially useful for routes that have no content. A folder-scope route that contains no content is still listed on the Routes page for the folder, even though it doesn't contain items from the folder.

Consequences of Creating a Route Based on a Route Template

When you create a route, you have the option of basing it on a Enterprise route template or a route template created previously by you. A route template contains the components of a route that are frequently reused, such as the route description, route members, and task definitions. Content is not included in a route template. Basing a route on a route template can speed up the route creation process because the system pre-fills the member and task information for you.

Route templates can be saved with no members and therefore no task assignees. If you create a route based on a template that has no members, you'll have to add members and assign tasks before starting the route. If the route template has members, some tasks may still be unassigned and you'll have to assign these tasks before starting the route.

In Team Central, if the template is based on a route that has a scope item defined (a workspace, for example) and it contains members who do not have at least Basic access to the scope item, they are not included in the route. Any tasks these people are assigned are removed from the route.

The route template controls the amount of editing that can be performed on the task list for routes created from the template. A route template can be defined to allow one of the following four levels of editing. These edit levels control whether the person who creates routes from the template can add and remove tasks, edit the task names, and edit the task

orders. The pages that let you define the tasks for a route indicate the tasks that come from the template with a (t).

- **Maintain Exact Task List**—People who create a route from this template must use the exact task list, with no tasks added or removed. The route creator cannot make any changes to the task order or names, but all other fields can be changed, including the task assignee.
- **Extend Task List**—People who create a route from this template must use the exact task list, but more tasks can be added to an existing route order number or a new number. The route creator cannot make any changes to the order or names of tasks from the route template, but can change all other fields. The route owner can make any changes to tasks the owner adds to the route.
- **Modify Task List**—People who create a route from this template can change all information for template tasks except the task name. The route creator can add new tasks but cannot delete template tasks.
- **Modify/Delete Task List**—People who create a route from this template can change and delete any task and can add new tasks.

Creating a Route: Basic Information Only

This section contains instructions for creating a route and entering only basic information for it. You must define content, member access, and tasks before you can start the route. For instructions on using the Route wizard to define all components of the route when you create it, see [Creating a Route: All Route Information](#).

To create a route by entering only basic information

1. From the global toolbar, click **My Desk>Routes>Create Route**.

Or

Access the list of routes for a particular object and click **Create Route** from the Actions menu on the Routes page. For details, see [Listing Routes](#).

The Create New Route page opens.

Create New Route

?

Fields in red italics are required

<i>Name</i>	<input type="text"/>	<input type="checkbox"/> Autaname
Template	<input type="text"/>	<input type="button" value="..."/> <input type="button" value="Clear"/>
<i>Description</i>	<div style="border: 1px solid gray; height: 60px;"></div>	
Route Base Purpose	Approval ▾	
Scope	<input checked="" type="radio"/> All <input type="radio"/> Organization <input type="radio"/> <input type="text" value="Workspace-5000"/> <input type="button" value="..."/>	
<i>Route Completion Action</i>	Promote Connected Object ▾	

2. Enter the **Name** you want to use for the new route.

Or

Check **Autaname** to have the system assign a name. When a route is autonamed, the system assigns a prefix and a sequential number for the name, such as R-000305.

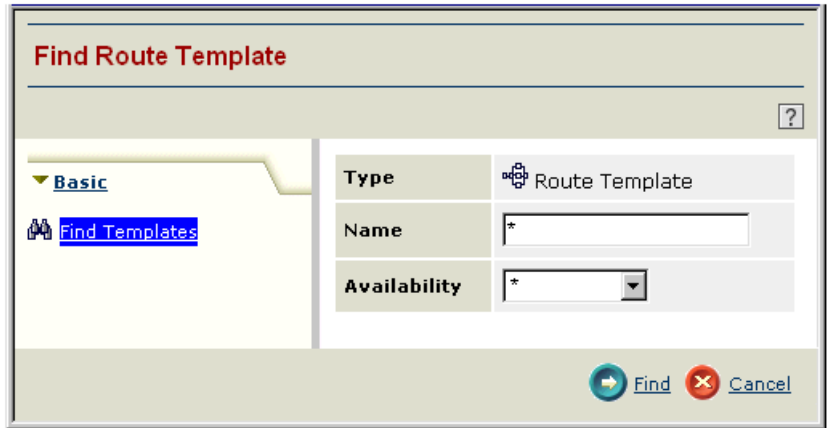
3. If this is a sub-route that you are creating to complete another route's task, use the **Visible to Parent Route Owner** options to choose whether you want the sub-route to be shown to people who can access the parent route. This includes the parent route owner, all members of the parent route, and Workspace Leads (if Team Central is installed).

- If you don't want others to see the sub-route, choose **No**.
- If you want others to see the sub-route, choose **Yes**.

These options are not shown unless the route is a sub-route.

4. Use the Template box to specify a template on which to base the route. After creating a route, you cannot change the template it is based on. See [Consequences of Creating a Route Based on a Route Template](#). If you don't want to use a template, proceed to Step 5. To specify a template:

- a) Click .

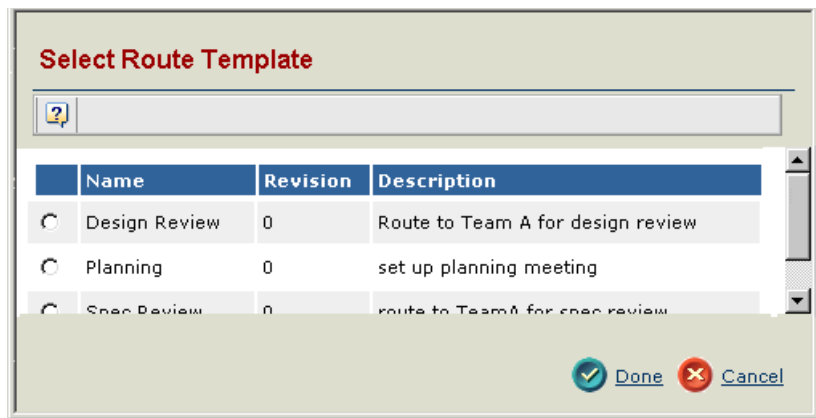


- b) From the Find Route Template page, enter search criteria. The search is limited to route templates that you saved (User) or that your Company Representative saved for the company (Enterprise). For Company Representatives, the list includes all route templates created by employees of your company.

Name—To search for templates by name, enter the name of the template or enter part of it and use the wildcard *. The search is case sensitive. If you don't want to search by name, leave the * in the box.

Availability—Choose Enterprise or User to limit the search based on the route template availability. If you don't want to limit the search by availability, choose *. Only Company Representatives can create Enterprise-level route templates.

- c) Click **Find**.



- d) From the Select Route Template page, choose the template you want.


- e) Click **Done**.

5. Enter a **Description** that indicates the route's purpose.

If you are basing the route on an existing template, the description is already entered. You can edit it as needed.

6. Select the **Route Base Purpose**, which determines the kind of tasks included in the route.

- **Standard**—The route can include tasks that require the assignee's approval or comment or tasks intended only for notification or information.
- **Approval**—The route includes only tasks that require the assignee's approval.

- Review—The route includes only tasks that require the assignee’s comment.
7. Choose the route’s **Scope**: All or Organization. If Team Central is installed, you can click  to choose a specific workspace or folder, or if Program Central is installed, a project space. For details, see [Determining a Route’s Scope](#).
 8. Select a **Route Completion Action**, which determines the events that will occur when the route is complete:
 - Notify Route Owner—When the route is complete (all tasks are completed), the system sends a notification to the route owner.
 - Promote Connected Object—This option is for routes with content for which the route owner has defined lifecycle block states. If this option is selected, the system automatically promotes the object when the route is completed, assuming no other routes or requirements are blocking promotion. The route owner is also notified of the route completion.
 9. Click **Done**.

The category list and Properties page for the new route opens. Before starting the route, you must add content (if any), add members and assign accesses, and define tasks using these procedures:

 - [Defining Content for a Route](#)
 - [Adding and Removing Route Members and Defining Access](#)
 - [Defining the Tasks in a Route](#)

Then, when you’re ready to start the route, follow the instructions in [Starting a Route](#).

Creating a Route: All Route Information

This section contains instructions for using a wizard to create a route and define all of its components. At the end of the wizard, you can choose to start the route immediately or wait to start the route.

Creating a route involves these steps:

1. [Launching the Wizard and Entering Basic Information about the Route](#)
2. [Adding Content to the Route](#)
3. [Adding Members and Defining Accesses for the Route](#)
4. [Defining the Tasks](#)
5. [Controlling Creation of Tasks that Follow Concurrent Tasks](#)

Launching the Wizard and Entering Basic Information about the Route

Clicking Create Route Wizard from either the My Desk menu or from the Actions menu of a Routes page opens the first page of the Route wizard, which lets you enter basic information for the route.

If Team Central is installed, you can also launch the Route wizard with preselected content from a folder. When you do this, the route's scope is the folder or subfolder that contains the selected content. From the Content page for the folder, check the content you want to include in the route and click Route Selected. The wizard opens so you can enter basic information. When you reach the step for adding content to the route, the content you selected is listed.

You move through the wizard using the Next and Previous buttons at the bottom of each page. You can skip a page using Next and return to previous pages using Previous.

To launch the Route wizard and enter basic information

1. From the global toolbar, click **My Desk>Routes>Create Route Wizard**.

Or

Access the list of routes for a particular object and click **Create Route Wizard** from the Actions menu on the Routes page. For details, see [Listing Routes](#).

The first page of the wizard opens, the Specify Details page.

Step 1 of 4: Specify Details

Actions [?]


Fields in red italics are required

<i>Name</i>	<input type="text"/>	<input type="checkbox"/> Autaname
Template	<input type="text"/>	...
<i>Description</i>	<input type="text"/>	
Route Base Purpose	Approval	
Scope	<input checked="" type="radio"/> All <input type="radio"/> Organization <input type="radio"/> Workspace-5000	
<i>Route Completion Action</i>	Promote Connected Object	
<i>Start Route Upon Wizard Completion</i>	<input checked="" type="checkbox"/>	


Content

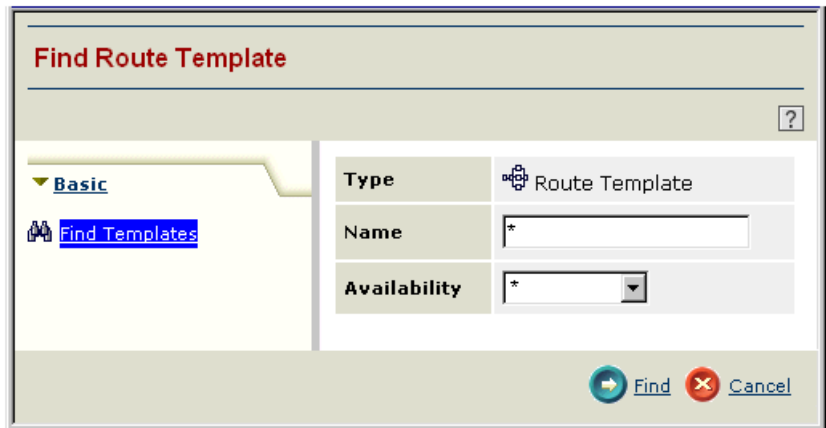
	Name	Ver	Rev	State Condition
<input type="checkbox"/>	abc.doc	1	A	Create
<input type="checkbox"/>

Next Cancel

2. Enter the **Name** you want to use for the new route.
Or
Check **Autoname** to have the system assign a name. When a route is autonamed, the system assigns a prefix and a sequential number for the name, such as R-000305.
3. If this is a sub-route that you are creating to complete another route's task, use the **Visible to Parent Route Owner** options to choose whether you want the sub-route to be shown to people who can access the parent route. This includes the parent route owner, all members of the parent route, and Workspace Leads (if Team Central is installed).
 - If you don't want others to see the sub-route, choose **No**.
 - If you want others to see the sub-route, choose **Yes**.These options are not shown unless the route is a sub-route.
4. Use the Template box to specify a template on which to base the route. See [Selecting a Route Template](#). If you don't want to use a template, skip this step.
5. Enter a **Description** that indicates the route's purpose.
If you are basing the route on an existing template, the description is already entered. You can edit it as needed.
6. Select the **Route Base Purpose**, which determines the kind of tasks included in the route.
 - Standard—The route can include tasks that require the assignee's approval or comment or tasks intended only for notification or information.
 - Approval—The route includes only tasks that require the assignee's approval.
 - Review—The route includes only tasks that require the assignee's comment.
7. Choose the route's **Scope**: All or Organization. If Team Central is installed, you can click  to choose a specific workspace or folder, or if Program Central is installed, a project space. For details, see [Determining a Route's Scope](#).
8. Select a **Route Completion Action**, which determines the events that will occur when the route is complete:
 - Notify Route Owner—When the route is complete (all tasks are completed), the system sends a notification to the route owner.
 - Promote Connected Object—This option is for routes with content for which the route owner has defined lifecycle block states. If this option is selected, the system automatically promotes the object when the route is completed, assuming no other routes or requirements are blocking promotion. The route owner is also notified of the route completion.
9. Click the **Start Route Upon Wizard Completion** check box if you want the route to start automatically when you finish defining it using the route wizard.

Selecting a Route Template

1. Use the Template box to specify a template on which to base the route. After creating a route, you cannot change the template it is based on. See [Consequences of Creating a Route Based on a Route Template](#). To specify a template:
 - a) Click .

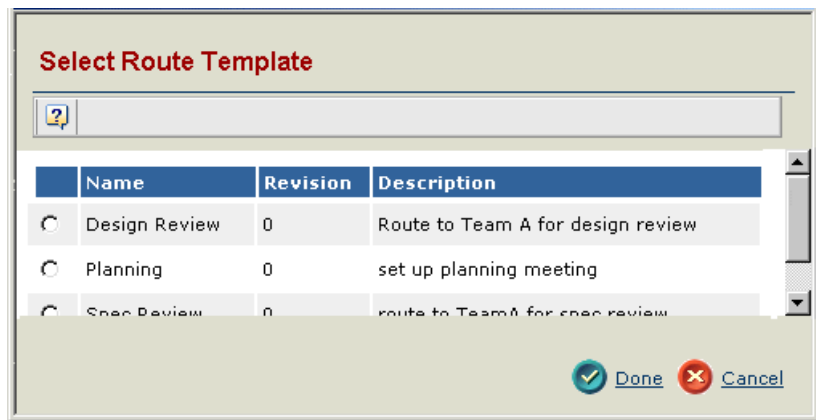


b) From the Find Route Template page, enter search criteria. The search is limited to route templates that you saved (User) or that your Company Representative saved for the company (Enterprise). For Company Representatives, the list includes all route templates created by employees of your company.

c) **Name**—To search for templates by name, enter the name of the template or enter part of it and use the wildcard *. The search is case sensitive. If you don't want to search by name, leave the * in the box.

Availability—Choose Enterprise or User to limit the search based on the route template availability. If you don't want to limit the search by availability, choose *. Only Company Representatives can create Enterprise-level route templates.

d) Click **Find**.



e) From the Select Route Template page, choose the template you want.

f) Click **Done**.

Adding Content to the Route

The Content section of the Specify Details page lets you specify the content you want to route to other route members. You can add no content or multiple items. The content that you add to a route can be:

- Documents in a local directory that are not in the database (referred to as an “external file”).

- Content already in the database. Depending on which MatrixOne applications you have installed, these objects could be parts, ECRs, ECOs, SCOs, RFQs, etc. If the route's scope is a Team Central folder or subfolder, the content is limited to the content of the folder and its subfolders.

For some non-document items, you can choose a block promotion state. When a block promotion state is chosen for an item, the system will not let the item be promoted from the state until the route is complete.


If you began the route by selecting items from a folder Content page, then that content is listed in the Content section at the bottom of the Specify Details page. Also, if you are creating the route based on a template that includes content, this content is listed. If you don't want to add any content or any additional content, you can click Next and proceed with the next step.

To add content to the route

1. To add database content to the route, click **Add Content** from the page Actions menu.

The Find Content page opens, where you can search for and select the item(s) that you want included in the route. The default type is Document. Allowable types depend on which MatrixOne applications are installed, and may vary depending on choices made by your Business Administrator for your installation. For example, if you have both Engineering Central and Specification Central installed, you can add items such as Engineering Central parts, ECOs, ECRs, etc., as well as Specification Central items such as SCOs and Technical Specifications.

a) Specify search criteria:

Type—Click  to select the type or subtype.

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.

Owner—Type an owner name or part of a name (using wildcards) if you want to limit the search results to objects owned by a particular person.


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

Vault—You can choose any of four 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).

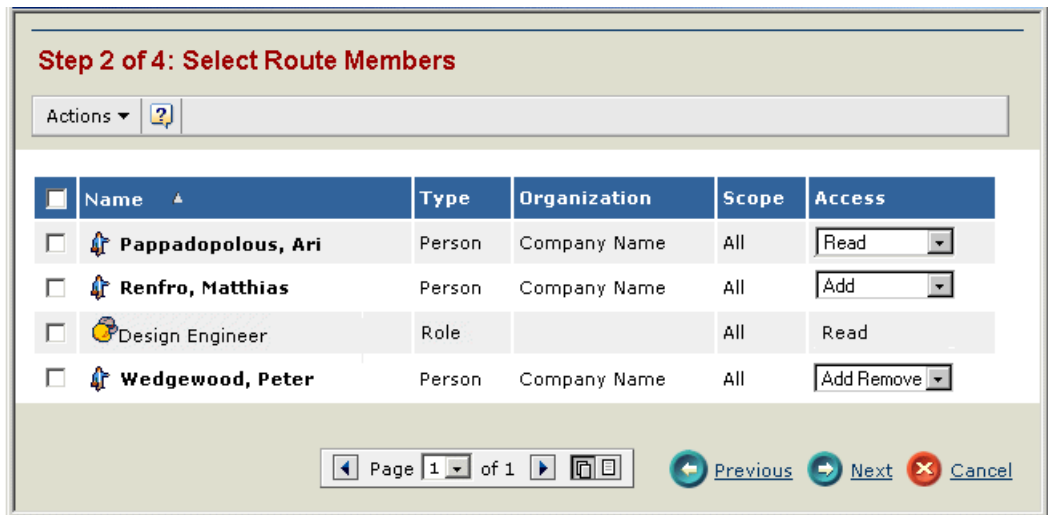
- b)** When you have entered your search criteria, click **Find**.
- To add documents that have not been added to the database but are in a local directory, click **Upload External File** from the page Actions menu. This link is available only if Team Central or Program Central is installed.
The Checkin Dialog appears, where you can search for and select the file(s) that you want to upload. For details, see [Uploading Files with the Applet](#) or [Uploading Files without the Applet](#).
 - To specify a **State Condition** for non-document items (only for items that have more than one state in their lifecycle), choose the state from the drop-down list in the State Condition column. If you don't want to specify a state, choose (none).
If you specify a block promotion state for an item, the system prevents the item from being promoted from that state until the route is completed. For example, suppose a buyer is routing an RFQ to be reviewed internally before sending it to suppliers. The buyer can make sure the RFQ is not sent to suppliers until the route (and associated review) is complete by specifying Initial Review as the block promotion state. Similarly, suppliers can make sure a quotation is not returned to the buyer until its route, which lets others in their company review it, is complete by choosing Review as the block promotion state.
 - To remove an item from the route, check it and click **Remove Selected** from the page Actions menu.
 - When you are finished adding content to the route, click **Next**.
The Specify Access page displays, as described in the next section.

Adding Members and Defining Accesses for the Route

Clicking Next from the Specify Details page brings up the Select Route Members page. This page lets you select the members to include in the route and specify the accesses they should have for the route.

You can add persons, registered groups and roles to a route. For details on registering groups, see “Configuring Groups for MatrixOne Applications” in the *Application Exchange Framework Administrator Guide*. When the system creates the task assigned to a group or role, it notifies all people who belong to the group or role. The first person who accepts the task is designated as the task assignee and can complete the task.

All route members will be able to access the route once you start it and you can assign one or more tasks to any route member. If you are creating this route based on a route template that includes members, the template members are already listed. You can remove these members, add new ones, change their route access (for Team Central only), or leave them unchanged.



For each member listed, the page shows:

Name—The name of the person, group or role added to the route.

Type—Distinguishes between people added individually/through a member list (Person), groups, and roles.

Organization—The organization the person belongs to. This is blank for groups and roles.

Scope—The scope of the route (all, organization, workspace, or project space), as defined in the first frame of the wizard.

Access—The access each member has for the route. When members are added to the route, their access is Read but you can set a higher access level. This access level is for the route only and not for the content. Groups and roles are added to the route with Read access. See Step 3 below for details on each access level.

To specify who should be included in the route

1. Add members to the route.

You can search for people, groups, roles, or member lists. If you add a member list, each person in the member list is added to the route. If the scope of the route is a workspace or project space, you can add route members outside the scope, but only those members who are within the scope will have access to the route content.

From the page Actions menu, click one of the following: **Add People**, **Add Group**, **Add Role**, or **Add Member List**.

Enter search criteria and click **Search**. For help entering criteria, click on the Search page or see *AEF Help*.

All members who meet the criteria you entered are shown. The check box for those already added to the route is grayed.

- a) Check the members you want to add.
- b) Click **Done**.

The members you chose are added to the Select Route Members page.

2. Remove any members that you do not want to assign a task to. For example, if the route was created based on a template, you may want to remove some members who were saved with the template. If you added a member list, you might want to remove some of the people on the member list.
 - a) Check the members you want to remove from the route.
 - b) Click **Remove Selected** from the page Actions menu.
 - c) At the confirmation message, click **OK**.
3. Choose the access for each person.

These accesses are for the route itself and not for the individual items being routed. Access to route content is defined separately for each content item. For example, a person with Add access to the route can add content to the route but cannot edit or delete a document in the route unless the person has Write and Remove access for the document.

Read—Every person, group and role included in the route is assigned at least Read access for the route. This means the member can view the category list and Properties page for the route, including all tasks, history, and accesses for the route. The member can also view and download route content but only the items the person has Read access to are listed. Read access also lets members subscribe to the route.

Read Write—A person with Read Write access to the route has Read permissions and can also check in files to the route.

Add—A person with Add access to the route has Read Write permissions and can also add new content to the route.

Remove—A person with Remove access has Read Write permissions and can also remove content from the route.

Add Remove—A person with Add Remove access has the accesses defined for both Add and Remove access.
4. Click **Next**.

The Assign Tasks page appears, as described in the next section.

Defining the Tasks

Clicking Next from the Select Route Members page brings up the Define Route Tasks page. One task is included for each member added to the route. Use this page to specify details about the tasks. You can also create additional tasks for any route members.

If you are creating this route based on a route template, the tasks from the template are also listed and have a (t) next to the task name. Depending on how the template is defined, you may not be able to make many changes to the task list, or you may have full editing ability. For a description of the task editing levels for a route template, see [Consequences of Creating a Route Based on a Route Template](#).

Step 3 of 4: Define Route Tasks

Actions

<input type="checkbox"/>	Name, Action & Order	Assignee & Instructions	Due Date & Time (EDT)
<input type="checkbox"/>	Document Sent Action Notify Only Order 1	Author, DMC Comp1 document has been sent out	Jan 6, 2004 9:00 AM Clear Advanced <input type="radio"/> day(s) from Route Start Date <input type="radio"/> Assignee-Set Due Date <input type="checkbox"/> Allow Delegation <input type="checkbox"/> Requires Owner Review
<input type="checkbox"/>	Review Document Action Approve Order 1	Everything, Test review document	9:00 AM Clear Advanced <input checked="" type="radio"/> 1 day(s) from Route Start Date <input type="radio"/> Assignee-Set Due Date <input checked="" type="checkbox"/> Allow Delegation <input type="checkbox"/> Requires Owner Review

To define the tasks in the route

1. For each task, specify the task **Name, Action & Order**.
 - a) Entering a Name for the task is optional. If you don't enter a name, the system will use an automatically-generated name, such as IT-292928.
 - b) Choose the **Action** you want the task assignee to perform. Note that the action does not affect the person's access to the route's content. In addition to indicating the action the person should perform, the action affects the options presented when the person completes the task:

Approve—If you choose Approve as the action, in addition to the Comment box, the task recipient must choose an approval status: Approve, Reject, or Abstain. If the task assignee chooses Approve or Abstain and then completes the task, the route continues as usual. If the task assignee chooses Reject and then completes the task, the route is stopped and the route creator is notified. The system does not create the next task in the route until the route creator resumes the route.

Comment, Investigate, Information Only—If you choose these options as the action, the recipient must enter a comment before completing the task.

Notify Only—If you choose this option, the recipient need only mark the task as complete to complete the task.
 - c) Choose the **Order** number that corresponds to the order in which you want the task to be pending for its recipient. If you want more than one task to be pending at the same time, choose the same order number for each task.

For example, suppose you want one person to complete a task and then you want two people to work on a task simultaneously. You would choose an order number of 1 for the first task. The other two tasks should have order numbers of 2.

2. Choose the Assignee & Instructions.

- a)** Using the drop-down list, choose the person, group, or role who should receive the task. This is a list of all members you added to the route on the previous page. If you're not ready to choose an assignee, you can leave the task unassigned until you are ready to start the route.


If you assign a group or role to a task, the system notifies all people in the group or role when the task is created. The first person to accept the task is then assigned to the task and is the only person who can complete it.

To assign one member to several tasks, check those tasks and click **Assign Selected** from the page Actions menu. Then choose the member from the Assign Tasks page and click **Done**.

- b)** Enter instructions for the task.

This should be a detailed description of what the person should do to complete the task. For example, you may want to indicate which file or section they should review or comment on.

3. For each task, choose how you want to handle the Due Date/Time. Choose one of the following options:

- Specify a due date and time. Click the first button under the Due Date & Time column. Choose the date by clicking the **Calendar**  icon and choose the time from the drop-down list. When you first open the calendar to assign a due date, the calendar shows the current date as the default. When you subsequently open the calendar within the same session, the default date is the last date you selected. This facilitates assigning sequential due dates to tasks. For instructions on using the calendar, see *AEF User Help*.
- Specify the due date/time as the number of days following the route start date or task creation date (the date the previous task assignee completes his/her task). Click the second button under the Due Date & Time column. Enter the number of **days from** and select whether it should be calculated from the **Route Start** or **Task Creation** date.

When calculating the due date, the system includes weekends and holidays so factor that into the number of days you enter. The maximum number of days is 365. For example, if you want to give the task assignee 10 working days to complete the task, you should enter 14 from the Task Create Date because it's likely there would be 4 weekend days within a 10-day working period. If you want the task to be complete 30 calendar days following the start of the route, you should enter 30 days from Route Start Date.
- Let the task assignee enter a due date by choosing **Assignee-Set Due Date**. Click the third button under the Due Date & Time column. The task assignee can enter a due date, although the system does not require one. If no due date is entered, the system does not display a status for the task.

If the assignee does not complete the task by the due date/time, the task is marked as late (red) and the route's status is changed from green to yellow. If late task notifications have been set up, the system sends out notifications to the appropriate people. For sub-routes, the system makes sure none of the task due dates are later than the parent task's due date. If they are, you must make the due dates earlier.

4. To allow the assignee to delegate the task to another person, check **Allow Delegation**.

If a task allows delegation, the assignee can delegate the task to another member to complete. See *Delegating a Task to Someone Else*. The delegate will temporarily inherit all accesses that the assignee has for the route and its content. The system may also delegate the task automatically if the recipient receives the task during a defined absence period and the person has designated an Absence Delegate. When the system automatically delegates a task, it also notifies the route owner.

The Tasks page will show a Delegate  icon for the tasks.

5. If you want to review a task after the assignee completes it, click **Needs Owner Review**.

After the assignee completes the task, the system notifies you. After reviewing the task, you must enter a review comment and then either promote the task to indicate approval or demote it to indicate rejection. The system does not create the next task in the route until you promote the task. Demoting the task changes its state back to Assigned and the assignee must recomplete the task based on your comments. When demoting the task, you can reassign it to someone else to work on.

The Tasks page will show a Requires Owner Review  icon for the task.

6. To assign additional tasks, click **Add Task** from the page Actions menu. A new task row is added. Repeat steps 1 through 5 to define the task.
7. Work with the tasks as needed:
 - To remove a task, check it and click **Remove Selected** from the page Actions menu.
 - To sort the list of tasks based on ascending order number and then by task name, click **Sort Task List** from the page Actions menu.

8. Click **Next**.

The Action Required page appears, as described in the next section.

Controlling Creation of Tasks that Follow Concurrent Tasks

Choosing Next from the Define Route Tasks page brings up the Action Required page. This page lets you specify whether tasks that have the same order number must all be complete before the subsequent tasks become pending or whether only one task must be complete. If you specify that only one task needs to be complete, the system deletes (rescinds) the remaining incomplete tasks at that order level and notifies the assignees for the deleted tasks. For example, suppose you assign three concurrent tasks to three people and ask that they approve a document in the route. All you need is approval from one of them so as soon as one of them completes the task, the other tasks can be deleted and the next task in the route can proceed.

If there are no concurrent tasks in the route, click Done to skip this page.

Step 4 of 4: Action Required

Order	Name	Action	Action Required
1	Fullbright, Lars	Review	
2	Irujo, Javier	Review	
3	Japoli, Octavia	Comment	<input type="radio"/> Any <input checked="" type="radio"/> All
3	Maguire, Padraig	Comment	
3	Nixon, Peter	Comment	
4	Pappadopolous, Ari	Approve	
5	Wedgewood, Peter	Implement	

 Previous  Next  Cancel

To control the creation of tasks that follow concurrent tasks

1. For each set of concurrent tasks, choose whether any or all must be completed before the next task(s) becomes pending.

Any—When one person completes a task in the set of concurrent tasks, the task or tasks in the next order level become pending and the remaining incomplete tasks in the current order level are deleted.

All—All tasks in the set of concurrent tasks must be complete before the next order level tasks become pending.

2. If this is a sub-route that you are creating to complete another route's task, use the **Visible to Parent Route Owner** options to choose whether you want the sub-route to be shown to people who can access the parent route. This includes the parent route owner, all members of the parent route, and Workspace Leads.
 - If you don't want others to see the sub-route, choose **No**.
 - If you want others to see the sub-route, choose **Yes**.

If this is not a sub-route, these options are not shown.

3. Click **Done**.

If you chose the Start Route on Wizard Completion option on the first page of the wizard, the route starts immediately. Otherwise, the route's status is Not Started. You can edit it as needed and then start it when you're ready. See [Starting a Route](#).

If you started the route, the system changes the route to the Started status and creates each task that has an order number of 1. The task recipients will see the task listed in their tasks list and they will receive notification that the task is pending. If the task is assigned to a group or role, all people assigned to the group or role receive the notification. If you receive a message that says no persons were notified, there were no people assigned to the role who have Read access to the route content. You should assign the task to someone else. See [Editing the Definition of a Task](#).

If there are members in the route who are not assigned a task, the application removes them from the route when you start it.

When you start a sub-route, the system makes sure none of the task due dates are later than the parent task's due date. If they are, you must make the due dates earlier.

When all tasks are completed, the system changes the route status to Finished and notifies you that the route is complete. You should then remove the files from the route so other workspace members can edit and route them. See [Processing Completed Routes](#).

If a person chooses Reject for the approval status (approval status is only available if the task action is Approve), then the route is stopped and the system notifies you via email and IconMail. The system does not route the files to anyone else unless you resume the route. See [Processing Rejected Routes](#).

Editing a Route's Details

The route creator can edit its name, description, and route completion action even after the route has been started.

To edit details for a route

1. From the global toolbar, click **My Desk>Routes>My Routes**.

Or

If you are working within an object, click **Routes** from the object's category list.

2. From the Routes page, click the Name of the route.
3. From the Properties page Actions menu, click **Edit Details**.

The Edit Route Details page opens.

Edit Route Details	
Fields in red italics are required	
<i>Name</i>	R-0000100
Scope	All
Template	
State	In Process
<i>Description</i>	route for my document
Owner	Smith, Michael
Originated	Jan 6, 2004 5:30:24 PM
Route Base Purpose	Standard
<i>Route Completion Action</i>	Notify Route Owner

4. Edit the **Name**, **Description** or **Route Completion Action** as needed. The description should indicate the purpose of the route, which is usually the goal the tasks are to accomplish.

The other information on the page is read only and can't be changed after the route is created. For a description of this information, see [Viewing Information about a Route](#).

Starting a Route

When using the Route wizard to create a route, you have the option of starting it immediately or waiting to start it later. If you created a route but didn't start it, you can edit it as needed and start it when you're ready. Routes that you create but don't start have a state of Not Started. Once started, the route state is Started. Only the route owner can start the route.

If there are members in the route who are not assigned a task, the application removes them from the route when you start it.

When you start a sub-route, the system makes sure none of the task due dates are later than the parent task's due date. If they are, you must make the due dates earlier.

To start a route you created but didn't start

1. From the global toolbar, click **My Desk>Routes>My Routes**.

Or

If you are working within an object, click **Routes** from the object's category list.

2. Check the route you want to start.
3. Click **Start/Resume Selected** from the page Actions menu.

The system changes the route to the Started status and creates each task that has an order number of 1. The task recipients will see the task listed in their tasks list and they will receive notification that the task is pending. If the task is assigned to a group or role, all people assigned to the group or role receive the notification and can access the task. If you receive a message that says no persons were notified, there were no people assigned to the group or role who have Read access to the route content. You should assign the task to someone else. See [Editing the Definition of a Task](#).

When all tasks are completed, the system changes the route status to Finished and notifies you that the route is complete. For Team Central users, if your system is configured so a document can only be in one route at a time, it is important to remove files from a route when the route is finished so the document can be routed and edited as needed. See [Processing Completed Routes](#). If a person chooses Reject for the approval status (approval status is only available if the task action is Approve), then the route is stopped and the system notifies you via email and IconMail. The system does not route the files to anyone else unless you resume the route. See [Processing Rejected Routes](#).

Processing Completed Routes

When the last person in a route completes his or her task, the route state changes to Finished and the system notifies the route creator. At this point, the route creator should review the tasks and any content that has been edited or added. For Team Central users, if your system is configured so a document can only be in one route at a time, it is important to remove files from a route when the route is finished so the document can be routed and edited as needed.

To process a completed route

1. From the global toolbar, click **My Desk>Routes>My Routes**.

Or

If you are working within an object, click **Routes** from the object's category list.

2. From the Routes page, click the Name of the finished route.
3. From the category list for the route, click **Tasks**.
4. For each task, review the comment and approval status chosen and entered by the task assignee.

A comment is required for all task actions except Notify Only. Tasks with Approve action require the assignee to select an approval option.

5. Review any edited or added content by clicking **Content** from the route category list. For instructions on viewing content, see [Viewing Documents and Content](#).
6. To remove content from the route:

For Team Central users, if your system is configured so a document can only be in one route, it is important to remove files from a route when the route is finished so the document can be routed and edited as needed.

- a) From the route Content page, check the items you want to remove.
- b) Click **Remove Selected** from the page Actions menu.
- c) At the confirmation message, click **OK**.

Processing Rejected Routes

If a task assignee chooses Reject for the approval status (approval status is only available if the task action is Approve) and then completes the task, the system stops the route and notifies the route owner via email and IconMail. The system does not activate the remaining tasks in the route unless the route owner resumes the route.

If there are other tasks of the same sequence order as the rejected task and the route is set up so all tasks must be completed for that sequence order, the task assignees can complete the remaining tasks. If the route owner resumes the route, the assignees must complete the tasks, as usual. If the sequence order is set up so any task must be completed, then the remaining tasks are rescinded when the rejected task is completed.

To process a rejected route

1. From the global toolbar, click **My Desk>Routes>My Routes**.

Or

If you are working within an object, click **Routes** from the object's category list.

2. From the Routes page, click the Name of the stopped route.
3. From the category list for the route, click **Tasks**.
4. Review the comment entered by the person who rejected the route.
5. If needed, review the route content by clicking **Content** from the route category list. For instructions on viewing content, see [Viewing Documents and Content](#).
6. Based on the comments, approval statuses, and content, decide how you want to process the rejected route. You have three options:
 - Resume the route and have the system activate the remaining tasks in the route as it normally would, beginning with the tasks in the sequence order following the order for the rejected task. Before resuming the route, you can edit the route as

needed. For example, you can add, remove, and edit content; define new tasks; and edit task definitions. You might want to add another task for the person who rejected the route so the person can review and approve it. Additionally, you might want to edit the instructions for tasks to clarify them and change due dates. To resume a rejected route, go to the Routes page that lists the route (Step 1 above), check the route, and click **Start/Resume Selected**.

- Delete the route. Then you can create a new route when you are ready. See [Deleting a Route](#).
- Leave the route in the Stopped state. You can always resume it or delete it at a later date.

Deleting a Route

You can delete routes that you have created, no matter what state the route is in. Deleting a route removes all information about the route, including all of its tasks, and stops any further tasks from being created. The system notifies task assignees who have an active task so they know why their task has been removed.

If the deleted route's tasks have sub-routes, the sub-routes and associated tasks are also deleted and their assignees are notified.

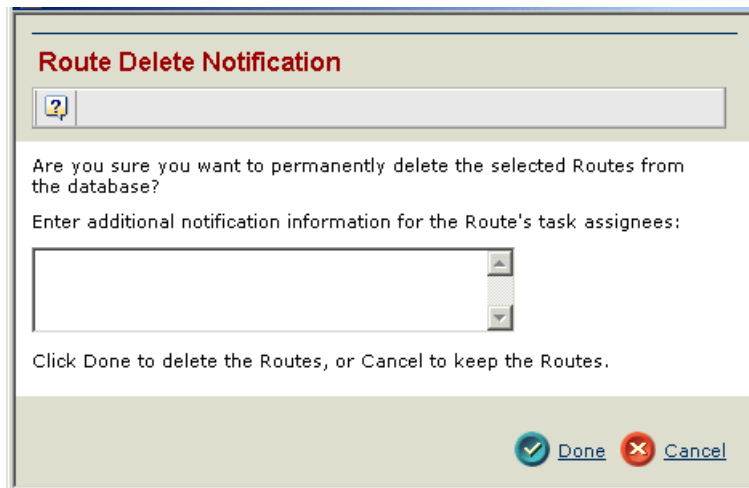
To delete a route you created

1. From the global toolbar, click **My Desk>Routes>My Routes**.

Or

If you are working within an object, click **Routes** from the object's category list.

2. From the Routes page, check the route you want to delete.
3. Click **Delete** from the page Actions menu.



The image shows a dialog box titled "Route Delete Notification". At the top, there is a search bar with a question mark icon. Below the search bar, the text asks: "Are you sure you want to permanently delete the selected Routes from the database?". Underneath, it says: "Enter additional notification information for the Route's task assignees:". There is a text input field with a vertical scrollbar. At the bottom of the dialog, there is a message: "Click Done to delete the Routes, or Cancel to keep the Routes." and two buttons: "Done" (with a green checkmark icon) and "Cancel" (with a red X icon).

4. At the confirmation message, enter additional information about why you are deleting the route. This information will be included in the notification sent to task recipients.
5. Click **Done**.

The system sends notifications to task assignees who have active tasks.

Routes: Tasks

This section contains the following topics related to working with all tasks in a route. Because these procedures pertain to all tasks in a route, they are mainly for the route owner. However any member in the route can list tasks for a route. If Team Central is installed, the workspace owner can set up task due date notifications. For information on working with tasks assigned to you, see [Tasks Assigned to You](#).

- [Setting Up Task Due Date Notifications](#)
- [Listing Tasks for a Route](#)
- [Viewing Information about Any Route Task](#)
- [Defining the Tasks in a Route](#)
- [Editing the Definition of a Task](#)
- [Processing a Task that Needs Owner Review](#)
- [Deleting a Task from a Route](#)

Setting Up Task Due Date Notifications

The owner of a route or workspace (for Team Central) can have the system notify people as task due dates approach and the tasks have not yet been completed. The owner can choose to notify task assignees, route owners, and/or workspace leads and can specify when these notifications should be sent by specifying the number of days and hours before or after the task due date. People receive these notifications in IconMail and email and receive one notification per task. For Team Central, these settings apply to all routes for the workspace and all of its folders. For other MatrixOne applications, these settings apply to the route they were created on.

The system also indicates that tasks are late by changing the task status from green to red if the assignee does not complete it by the due date. When at least one task is late, the route's status changes from green to yellow. If the last task in the route is overdue, the route status changes to red.

To set task due date notifications

1. Access a Routes list or the Properties page for a specific route. For details, see [Listing Routes](#) or [Viewing Information about a Route](#).
2. From the page Actions menu, click **Set Task Escalation**.
The Set Task Escalation page opens.

<input type="checkbox"/>	Escalate To	Escalate on Due Date	
<input type="checkbox"/>	Task Assignee	+ 0 Days	0 Hours
<input type="checkbox"/>	Route Owner	+ 0 Days	0 Hours
<input type="checkbox"/>	Project Lead(s)	+ 0 Days	0 Hours

3. Check the group(s) of people you want to send notifications to.

The Task Assignees include anyone who is currently the task assignee, which could be the original assignee or a delegate. The Project Lead(s) include the workspace owner and all Workspace Leads (for Team Central only) and project owners (for Program Central only).

4. To accept the default notification time and date for all checked groups, skip to Step 5. The default is the exact due date and time for the task (0 hours and days from the due date/time).

Or

To define the relative time before or after the task due date/time that the notifications should be sent, use the **Escalate on Due Date** drop-down lists.

- Use the first list to indicate if the time should be added (+) or subtracted (-) from the due date/time.
- Use the Days list to choose the number of days to add or subtract from the due date.
- Use the Hours list to choose the number of hours to add or subtract from the due time.

For example, suppose you want to notify task assignees 2 days before the task due date; route owners, 6 hours before; and Project Leads, 1 day after. You would fill in the page so it looks like this:

Task Assignee	- 2 Days 0 Hours
Route Owner	- 0 Days 6 Hours
Project Lead	+ 1 Days 0 Hours

The host company configures how frequently the system should check the task due dates. Depending on the specified frequency, the notifications may be later than the time offset established. For example, if the system only checks every two hours, the notifications could be as much as two hours later than the time set here.

5. Click **Done**.

Listing Tasks for a Route

You can list tasks for any route that you created or are included in.

To list the tasks for a route

1. From the global toolbar, click **My Desk>Routes>My Routes**.

Or

If you are working within an object, click **Routes** from the object's category list.

2. From the Routes page, click the Name of the route.
3. From the category list for the route, click **Tasks**.

The Tasks page opens, listing all tasks in the route. To see only the tasks in the Review state, choose Needs Review from the filter list on the top right of the page. This filter option is available only for the route owner.

Name	Order	State	Assignee	Action	Approval Status	Due Date/Time
Task-5000	1	Complete	Fullbright, Lars	Approve	Approved	Sep 2, 2002 4:00 PM EST
Task-5011	2	Assigned	Vandalay, Art	Approve	Approved	Jul 5, 2002 12:30 PM EST
Task-5011	2	Pending	Irujo, Javier	Approve		Jul 5, 2002 10:00 AM EST
Task-5011	2	Pending	Japoli, Octavia	Approve		Jul 5, 2002 9:00 AM EST
Task-5025	3	Pending	Maguire, Padraig	Review		Jul 5, 2002 4:00 PM EST
Task-5076	4	Pending	Nixon, Peter	Approve		Jul 5, 2002 2:30 PM

For each task, the page shows:

Status—Shows the status of the task. A green arrow means the task is on time. It's either not yet due or was completed before the due date. A red square means the task was not completed in time for the due date. Pending tasks and tasks that do not have an assigned due date have no status.

Name—The name of the task. To see details about the task, click its Name.

Order—The order of the task within the route.

State—Pending, Assigned, Review, or Complete.

- Pending—The previous task in the route hasn't been completed so the assignee isn't assigned to work on it yet. If the route isn't started yet, all tasks are pending.
- Assigned—When a task is created for an assignee, its state is Assigned.
- Review—Only tasks with a Needs Owner Review icon go through the Review state. For these tasks, the state changes from Assigned to Review when the assignee completes the task. If the route owner promotes the task, indicating approval, the state changes to Complete. If the owner demotes the task, indicating rejection, the state returns to Assigned so the assignee can redo the task.

- **Complete**—For tasks that do not have the Needs Owner Review icon, when the assignee indicates a task is complete by clicking Complete, the state changes to Complete and the next task in the route is created (provided there are no other tasks that must be completed).

Assignee—The person, group, or role the route creator assigned to the task unless the original assignee delegated the task to someone else. If the route creator assigned the task to a group or role, the assignee changes to the name of the first person in that group or role to accept the task.

Action—The action the task assignee should perform: Approve, Comment, Notify Only, or Investigate. If the action is Approve, the assignee must choose an approval status to complete the task: Approve, Reject, or Abstain. All actions except Notify Only require that the route member enter a comment to complete the task.

Approval Status—For tasks with an action of Approval, this column shows the approval option the task assignee selected: Approve, Reject, or Abstain. The column is blank for non-approval tasks.

Due Date/Time—The date and time the route owner requests that the assignee complete the task. If the assignee does not complete the task by this date, the task is marked as late (red) and the route’s status is changed from green to yellow (if it’s the last task in the route, the status changes to red). If the route has set up late task notifications, the system sends out notifications to the appropriate people.

If the route owner set the task due/time by specifying a number of days following the route start date and the route is not yet started, the field indicates the number of days following the route start. Similarly, if the due date/time is a number of days following the task creation and the task isn’t created yet, the field indicates this.

If no date/time is displayed, the route owner is allowing the task assignee to set the due date and the assignee has not yet entered one.

Allow Delegation—Shows whether the route creator has indicated that the task can be delegated. If a task allows delegation, the assignee can delegate the task to someone else to complete. See [Delegating a Task to Someone Else](#). The delegate will temporarily inherit all accesses that the assignee has for the route and its content. The system may also delegate the task automatically if the recipient receives the task during a defined absence period and the person has designated an Absence Delegate. When the system automatically delegates a task, it also notifies the route owner.

Needs Owner Review—If there is no icon in this column, the task’s state changes to Complete when the task assignee completes the task and the next task in the route is created. If the Needs Owner Review icon is displayed, when the assignee completes the task, the task’s state changes to Review and the system notifies the route owner. After reviewing the task, the route owner must enter a review comment and then either promote the task to indicate approval or demote it to indicate rejection. The system does not create the next task in the route until the owner promotes the task. Demoting the task changes its state back to Assigned and the task assignee must recomplete the task based on the route owner’s comments. When demoting the task, the route owner can reassign it to someone else to work on.

Comments—Ad hoc comments entered by the task assignee when completing the task. To complete the task, the assignee must fill in the comment field except for tasks with Notify Only actions.

Completed Date—The date and time the person clicked Complete for the task, as recorded by the system. If the task hasn’t been completed yet, the column is empty.

4. Work with the tasks as needed:

- To view information about a task, click the task Name. See [Viewing Information about Any Route Task](#).
- To add tasks or make changes to the tasks, click **Edit All** from the page Actions menu. These changes include the task name, order, due date, and instructions, and the action required settings. Only the route owner can define the tasks. See [Defining the Tasks in a Route](#).
- To delete a task, check the task and click **Delete** from the page Actions menu. Only the route owner can delete a task. See [Deleting a Task from a Route](#).

Listing Tasks for a Route—Graphical View

In addition to accessing a list of tasks for routes that you created or are included in, you can also view route tasks graphically. The graphical view shows how tasks fit sequentially into the route, where the route currently is within the sequence, who owns the task, and actions taken on tasks that have been completed.

To list the route tasks in a graphical view

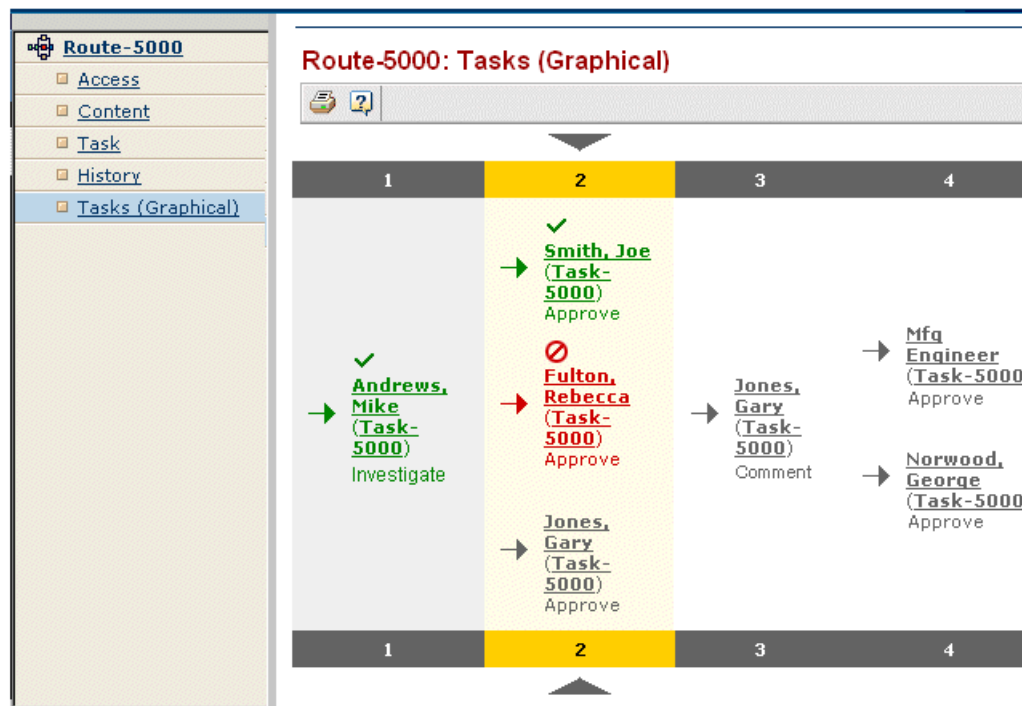
1. From the global toolbar, click **My Desk>Routes>My Routes**.

Or

If you are working within an object, click **Routes** from the object’s category list.

2. From the Routes page, click the Name of the route.
3. From the category list for the route, click **Tasks (Graphical)**.

The Tasks page opens, listing all tasks in the route.



The columns show the task sequence. The first column shows tasks that were assigned with order number 1, the second column shows tasks assigned order number 2, etc. Each column can contain multiple tasks. The column containing tasks in progress is highlighted

with an arrow below the column. If the tasks exceed the visual area, you can use the scroll bars to view additional tasks.

For each task, the following information is shown:

- **Assignee**—User who is responsible for completing the task. You may see a group or role name for future tasks or for tasks in the current sequence that have not yet been accepted. Once a member of the group or role accepts the task, the graph shows the person name.
Click on the assignee name to view the Properties page and tree for that person.
- **Task name**—Name of the task specified when the route was created.
 - For current and completed tasks, clicking on the task name shows the Task Properties/Content page and category list. This is in view-only mode for everyone except the task owner, who has a page Actions menu with links for updating the assignee and completing the task. If a task in the current sequence is assigned to a group or role, members of that group or role can click the task name to see the Task Properties page and tree, and can accept the task.
 - If the task is a future task, clicking on the task name brings up the view-only Task Properties popup page.
- **Action**—Under each task name is the action the assignee is required to perform: Approve, Comment, Investigate, or Notify Only.
- **Approval Status**—On completed tasks only, the action taken (Approve, Reject or Abstain) is shown as a .gif image above the assignee's name and color coded.
 - Green. Task has been completed and approved.
 - Red. Task has been rejected.
 - Gray. Task has not been completed.

Viewing Information about Any Route Task

You can view information about tasks in any route that you created or are included in. Workspace Leads (Team Central only) can view tasks for any route in the workspace. If you are assigned the task and want to complete it, see [Completing a Task](#).

To view information about a task


1. If the task is assigned to you and active, click **My Desk>My Tasks** from the global toolbar. See [Viewing Information about Your Assigned Tasks](#).
Otherwise
 - a) From the global toolbar, click **My Desk>Routes>My Routes**.
Or
If you are working within an object, click **Routes** from the object's category list.
 - b) From the Routes page, click the Name of the route.
 - c) From the category list for the route, click **Tasks**.
2. From the Tasks page, click the Name of the task you want to view information about. The Properties/Content page for the task opens.

taskone : Summary View

Actions ▾ ?

Properties

Fields in red italics are required

Owner	Test Everything
Originated	Feb 24, 2004 2:59:18 PM
Due Date	Feb 25, 2004 5:00:00 PM
Allow Delegation	Yes
<i>Assignee</i>	<input type="text" value="Test Everything"/> ...
Routes	 red team
Action	Approve
Approval Status	
State	Assigned
Instructions	review and approve

Content

Name ▲	Actions	Description	State Condition
CM-200000-01		Copy Machine	(none)

The Properties section of the task page contains the following:

Owner—The person who created the route.


Originated—Date the task was created, which is the date the route was defined, or last modified.

Due Date/Time—The date and time the route owner requests that the assignee complete the task. If the assignee does not complete the task by this date, the task is marked as late (red) and the route’s status is changed from green to yellow (if it’s the last task in the route, the status changes to red). If the route or workspace owner has set up late task notifications, the system sends out notifications to the appropriate people.

If the route owner set the task due/time by specifying a number of days following the route start date and the route is not yet started, the field indicates the number of days following the route start. Similarly, if the due date/time is a number of days following the task creation and the task isn’t created yet, the field indicates this.

If no date/time is displayed, the route owner is allowing the task assignee to set the due date and the assignee has not yet entered one.

Allow Delegation—If True, the assignee can delegate the task to another person in the assignee’s company. See [Delegating a Task to Someone Else](#). The system can also delegate the task automatically if the recipient receives the task during a defined absence period and the person has designated an Absence Delegate. For instructions on designating an Absence Delegate, see [Editing Your Profile](#). If False, the task cannot be delegated by the assignee or automatically by the system.

Assignee—The person, group, or role that is currently responsible for completing the task. This is person the route creator assigned to the task unless the original assignee delegated the task to someone else. If the route creator assigned the task to a group or role, the assignee changes to the name of the first person in that group or role to accept the task. If Allow Delegation is Yes and you own the task, this is an editable field. Click  if you want to assign the task to another person.

Route—Name of the route that contains the task. To see details about the route, click its name.

Action—The action the task assignee should perform: Approve, Comment, Notify Only, Information Only or Investigate. If the action is Approve, the route member must choose an approval status to complete the task: Approve, Reject, or Abstain. All actions except Notify Only require that the route member enter a comment to complete the task.

Approval Status—Only shown for completed tasks with Approve actions, this field shows the option the assignee chose: Approve, Reject, or Abstain. If the task assignee chooses Reject for the status to complete the task, the route is stopped, which means no new tasks are activated for the route. The route creator receives email and IconMail notification about the rejection. If the assignee chooses Approve or Abstain, the route continues as usual.

State—Pending, Assigned, Review, or Complete.

- Pending—The previous task in the route hasn't been completed so the assignee isn't assigned to work on it yet. If the route isn't started yet, all tasks are pending.
- Assigned—When a task is created for an assignee, its state is Assigned.
- Review—Only tasks with a Needs Owner Review icon go through the Review state. For these tasks, the state changes from Assigned to Review when the assignee completes the task. If the route owner promotes the task, indicating approval, the state changes to Complete. If the owner demotes the task, indicating rejection, the state returns to Assigned so the assignee can redo the task.
- Complete—For tasks that do not have the Needs Owner Review icon, when the assignee indicates a task is complete by clicking Complete, the state changes to Complete and the next task in the route is created (provided there are no other tasks that must be completed).

Instructions—Describes how to perform the task.

Comments—Ad hoc comments entered by the task assignee when completing the task. To complete the task, the assignee must fill in the comment field except for tasks with Notify Only actions.

Review Comments—Displayed only for tasks marked with Needs Owner Review. Shows comments entered by the route owner after the assignee marked the task as complete. After entering review comments, the route owner promotes the task to indicate approval or demotes it to indicate rejection. If the route owner reviewed the task more than once, as a result of demoting the task and having the task recompleted, comments from the previous review are included.

Sub-Routes—If the task assignee created a sub-route(s) for the task and chose to display it to people who can access the route, the sub-route is listed. To see details about it, click its name. The Properties page for the sub-route opens in a new window.

Route Owner Review—If No, the task's state changes to Complete when the task assignee completes the task and the next task in the route is created. If Yes, when the assignee completes the task, the task's state changes to Review and the system notifies the route owner. After reviewing the task, the route owner must enter a review

comment and then either promote the task to indicate approval or demote it to indicate rejection. The system does not create the next task in the route until the owner promotes the task. Demoting the task changes its state back to Assigned and the task assignee must recomplete the task based on the route owner's comments. When demoting the task, the route owner can reassign it to someone else to work on.

3. To edit the definition of any pending task, click **Edit Details** from the page Actions menu.

Only the route owner can edit the definition of tasks in the route. Note that the Approval Status and Comments are for the assignee to complete. If the task allows delegation, the owner can also change the assignee. For instructions on how the route owner can edit task information, see [Editing the Definition of a Task](#). For instructions on how the task assignee can edit task information, see [Completing a Task](#) and [Delegating a Task to Someone Else](#).

Defining the Tasks in a Route

If you created a route by entering only basic information for it (you did not use the Route wizard), you'll need to use this procedure to define tasks for the route. You can also use this procedure if you did define tasks for the route and want to edit them or add more. The route owner can edit any task in a route as long as the task has not been completed yet. The owner can also add new tasks as long as the route is not complete.

If you just want to edit properties for one task, you can use Edit Details on the task's Properties page. For tasks that are active (the assignees can work on them now), the only way to edit them is to use Edit Details and not this procedure. See [Editing the Definition of a Task](#).

To define the tasks in a route

1. From the global toolbar, click **My Desk>Routes>My Routes**.

Or

If you are working within an object, click **Routes** from the object's category list.

2. From the Routes page, click the Name of the route.
3. From the category list for the route, click **Tasks**.
4. From the Tasks page Actions menu, click **Edit All**.

The Add/Edit Tasks page opens, listing all tasks that have been added to the route. Completed and active tasks are not editable.

If this route is based on a route template, the tasks from the template have a (t) next to the task name. Depending on how the template is defined, you may not be able to make many changes to the task list or you may have full editing ability. For a description of the task editing levels for a route template, see [Consequences of Creating a Route Based on a Route Template](#).

Step 1 of 2: Add/Edit Tasks

[Add Task](#) [Sort Task List](#) ?

<input type="checkbox"/>	Order	Name	Assignee and Action		Instructions	Due Date/Time
<input type="checkbox"/>	1	Task-5000	Fullbright, Lars Approve		Instructions for this task would be displayed here.	Fri May 4, 2001; 10:00 AM EST
<input type="checkbox"/>	2	Task-5011	Vandalay, Art Approve		Instructions for this task would be displayed here.	<input type="radio"/> <input type="text"/> <input type="text"/> <input type="button" value="Clear"/> <input checked="" type="radio"/> 3 days from <input type="text"/> Route Start Date <input type="radio"/> Assignee-Set Due Date
<input type="checkbox"/>	2	Task-5012	Inujo, Javier Comment		Instructions for this task would be displayed here.	<input checked="" type="radio"/> 5/15/03 <input type="text"/> 10:00 AM <input type="button" value="Clear"/> <input type="radio"/> <input type="text"/> days from <input type="text"/> Route Start Date <input type="radio"/> Assignee-Set Due Date

[Remove Selected](#) [Allow/Deny Delegation](#)

1. To add new tasks, click **Add Task** from the page Actions menu.
2. Specify the task **Name, Action & Order**.
 - a) Entering a Name for the task is optional. If you don't enter a name, the system will use an automatically-generated name, such as IT-292928.
 - b) Choose the **Action** you want the task assignee to perform. Note that the action does not affect the person's access to the route's content. In addition to indicating the action the person should perform, the action affects the options presented when the person completes the task:

Approve—If you choose Approve as the action, in addition to the Comment box, the task recipient must choose an approval status: Approve, Reject, or Abstain. If the task assignee chooses Approve or Abstain and then completes the task, the route continues as usual. If the task assignee chooses Reject and then completes the task, the route is stopped and the route creator is notified. The system does not create the next task in the route until the route creator resumes the route.

Comment, Investigate, Information Only—If you choose these options as the action, the recipient must enter a comment before completing the task.

Notify Only—If you choose this option, the recipient need only mark the task as complete to complete the task.
 - c) Choose the **Order** number that corresponds to the order in which you want the task to be pending for its recipient. If you want more than one task to be pending at the same time, choose the same order number for each task.

For example, suppose you want one person to complete a task and then you want two people to work on a task simultaneously. You would choose an order number of 1 for the first task. The other two tasks should have order numbers of 2.

If the route has already started, you cannot choose an order number that has already been completed.
3. Choose the **Assignee & Instructions**.

- a) Using the drop-down list, choose the person, group, or role who should receive the task. This is a list of all members you added to the route on the previous page. If you're not ready to choose an assignee, you can leave the task unassigned until you are ready to start the route.

If you assign a group or role to a task, the system notifies all people in the group or role when the task is created. The first person to accept the task is then assigned to the task and is the only person who can complete it.


To assign one member to several tasks, check those tasks and click **Assign Selected** from the page Actions menu. Then choose the member from the Assign Tasks page and click **Done**.

If the original task assignee has created a sub-route for the task and the sub-route is incomplete, you cannot assign the task to someone else.

- b) Enter instructions for the task.

This should be a detailed description of what the person should do to complete the task. For example, you may want to indicate which file or section they should review or comment on.

- 4. For each task, choose how you want to handle the **Due Date/Time**. Choose one of the following options:

- Specify a due date and time. Click the first button under the Due Date & Time column. Choose the date by clicking the **Calendar**  icon and choose the time by choosing from the drop-down list. When you first open the calendar to assign a due date, the calendar shows the current date as the default. When you subsequently open the calendar within the same session, the default date is the last date you selected. This facilitates assigning sequential due dates to tasks. For instructions on using the calendar, see *AEF User Help*.
- Specify the due date/time as the number of days following the route start date or task creation date (the date the previous task assignee completes his/her task). Click the second button under the Due Date & Time column. Enter the number of **days from** and select whether it should be calculated from the **Route Start** or **Task Creation** date.

When calculating the due date, the system includes weekends and holidays so factor that into the number of days you enter. The maximum number of days is 365. For example, if you want to give the task assignee 10 working days to complete the task, you should enter 14 from the Task Create Date because it's likely there would be 4 weekend days within a 10-day working period. If you want the task to be complete 30 calendar days following the start of the route, you should enter 30 days from Route Start Date.

- Let the task assignee enter a due date by choosing **Assignee-Set Due Date**. Click the third button under the Due Date & Time column. The task assignee can enter a due date, although the system does not require one. If no due date is entered, the system does not display a status for the task.

If the assignee does not complete the task by the due date/time, the task is marked as late (red) and the route's status is changed from green to yellow. If late task notifications have been set up, the system sends out notifications to the appropriate people. For sub-routes, the system makes sure none of the task due dates are later than the parent task's due date. If they are, you must make the due dates earlier.

- 5. To allow the assignee to delegate the task to another person, check **Allow Delegation**.

If a task allows delegation, the assignee can delegate the task to another member to complete. See *Delegating a Task to Someone Else*. The delegate will temporarily inherit all accesses that the assignee has for the route and its content. The system may also delegate the task automatically if the recipient receives the task during a defined absence period and the person has designated an Absence Delegate. When the system automatically delegates a task, it also notifies the route owner.

The Tasks page will show a Delegate  icon for the tasks.

6. If you want to review a task after the assignee completes it, click **Requires Owner Review**.

After the assignee completes the task, the system notifies you. After reviewing the task, you must enter a review comment and then either promote the task to indicate approval or demote it to indicate rejection. The system does not create the next task in the route until you promote the task. Demoting the task changes its state back to Assigned and the assignee must recomplete the task based on your comments. When demoting the task, you can reassign it to someone else to work on.

The Tasks page will show a Requires Owner Review  icon for the task.

7. Click **Done**. The task is added to the list on the Add/Edit Tasks page. To assign additional tasks, repeat steps 1 through 6.
8. Work with the tasks as needed:
 - To remove a task, check it and click **Remove Selected** from the page Actions menu.
 - To sort the list of tasks based on ascending order number and then by task name, click **Sort Task List** from the page Actions menu.
9. Click **Next**.

The Action Required page opens. This page lets you specify whether tasks that have the same order number must all be complete before the subsequent tasks become pending or whether only one task must be complete. If you specify that only one task needs to be complete, the system deletes (rescinds) the remaining incomplete tasks at that order level and notifies the assignees for the deleted tasks. For example, suppose you assign three concurrent tasks to three people and ask that they approve a document in the route. All you need is approval from one of them so as soon as one of them completes the task, the other tasks can be deleted and the next task in the route can proceed.

You cannot change the action required status for completed tasks. As long as one of the tasks in a set of concurrent tasks is not complete, you can change the setting.

Step 2 of 2: Action Required



Order	Name	Action	Action Required
1	Fullbright, Lars	Approve	
2	Vandalay, Art	Approve	<input type="radio"/> Any <input checked="" type="radio"/> All
2	Irujo, Javier	Approve	
2	Japoli, Octavia	Approve	
3	Maguire, Pdraig	Review	
4	Nixon, Peter	Approve	
5	Pappadopolous, Ari	Review	<input type="radio"/> Any <input checked="" type="radio"/> All
5	Vandalay, Art		

Previous Done Cancel

10. For each set of concurrent tasks, choose whether any or all must be completed before the next task(s) becomes pending.

Any—When one person completes a task in the set of concurrent tasks, the task or tasks in the next order level become pending and the remaining incomplete tasks in the current order level are deleted.

All—All tasks in the set of concurrent tasks must be complete before the next order level tasks become pending.

11. Click **Done**.

Editing the Definition of a Task

The route owner can edit the definition of any task in the route as long as the task has not been completed yet. This includes changing the assignee to another person, for example, if the original assignee cannot complete the task in time. This procedure describes how to edit the definition of one task at a time and is the procedure you must use to edit tasks that are active (those assignees can work on now). To edit properties for more than one pending task and add new ones, see *Defining the Tasks in a Route*.

To edit the definition of a task

1. From the global toolbar, click **My Desk>Routes>My Routes**.


Or

If you are working within an object, click **Routes** from the object's category list.

2. From the Routes page, click the Name of the route.
3. From the category list for the route, click **Tasks**.
4. From the Tasks page, click the Name of the task you want to edit.
5. From the Actions menu on the Task Properties page, click **Edit Details**.

Edit Task Details

Fields in red italics are required

Name	Sign off
Originated	1/6/2004 6:27:50 PM
<i>Due Date</i>	<input type="text"/>  10:00 AM
<i>Allow Delegation</i>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<i>Assignee</i>	Billings, Ming
Route	R-0000101
<i>Action</i>	Approve
<i>Instructions</i>	review and approve

Done Cancel


6. From the Edit Task Details page, edit the information as needed:

Name—The name of the task. The route owner can change the task name only using the Edit All option.

Owner—The person who created the route. You cannot assign ownership to someone else.

Originated—Date the task was created, which is the date the previous task(s) (previous order in route) was completed.

Due Date/Time—If the assignee does not complete the task by the due date/time, the task is marked as late (red) and the route's status is changed from green to yellow. If the route or workspace owner has set up late task notifications, the system sends out notifications to the appropriate people. If you are defining tasks for a sub-route, the task due dates cannot be later than the parent task's due date. Choose one of these three options. If the task has already been created, the second option is not available.

- Specify a due date and time. Make sure the first of the three buttons for the tasks's Due Date/Time is selected. Click  to choose the date, and choose the time by choosing from the drop-down list. When you first open the calendar to assign a due date, the calendar shows the current date as the default. When you subsequently open the calendar within the same session, the default date is the last date you selected. This facilitates assigning sequential due dates to tasks. For instructions on using the calendar, see *AEF User Help*.

- Specify the due date/time as the number of days following the route start date or task creation date (the date the previous task assignee completes his/her task). Choose the second of the three buttons available for the Due Date/Time and enter the number of **days from** and select whether it should be calculated from the **Route Start** or **Task Creation** date.

When calculating the due date, the system includes weekends and holidays so factor that into the number of days you enter. The maximum number of days is 365. For example, if you want to give the task assignee 10 working days to complete the task, you should enter 14 from the Task Creation Date because it's likely there would be 4 weekend days within a 10-day working period. If you want the task to be complete 30 calendar days following the start of the route, you should enter 30 days from Route Start date.

- Let the task assignee enter a due date by choosing **Assignee-Set Due Date**. Click the third button available for the Due Date/Time. The task assignee can enter a due date, although the system does not require one. If no due date is entered, the system does not display a status for the task.

Allow Delegation—Yes means the assignee can delegate it to any other user in the assignee's company. See *Delegating a Task to Someone Else*. The system can also delegate the task automatically if the assignee receives the task during a defined absence period and the person has designated an Absence Delegate. No means the task cannot be delegated by the assignee or by the system.

Assignee—The person, group or role who is to perform the task. To change the assignee to another route member, choose the member from the drop-down list. If the person, group or role you want to assign it to is not in the list, you must first add the person or role to the route. Note that if you change the task assignee so that one of the original route members has no tasks, the system removes the member from the route access list.

If you assign a group or role to a task, the system notifies all people in the group or role when the task is created. The first person to accept the task is then assigned to the task and is the only person who can complete it.

If the original task assignee has created a sub-route for the task and the sub-route is incomplete, you cannot assign the task to someone else.

Route—Name of the route that contains the task.

Action—The action the task assignee should perform: Approve, Comment, Notify Only, or Investigate. If the action is Approve, the route member must choose an approval status to complete the task: Approve, Reject, or Abstain. All actions except Notify Only require that the route member enter a comment to complete the task.

Approval Status—Only the assignee can change the approval status and only for tasks with Approve actions. The approval statuses available are Approve, Reject, or Abstain. If a person chooses Reject for the status and completes the task, the route is stopped and no other tasks are created for the route until the route creator resumes the route. The route creator receives email and IconMail notification about the rejection. If the task assignee chooses Approve or Abstain and then completes the task, the route continues as usual.

State—Pending, Assigned, Review, or Complete. The route owner cannot change the state from this page.


- Pending—The previous task in the route hasn't been completed so the assignee isn't assigned to work on it yet. If the route isn't started yet, all tasks are pending.
- Assigned—When a task is created for an assignee, its state is Assigned.

- **Review**—Only tasks with a Needs Owner Review icon go through the Review state. For these tasks, the state changes from Assigned to Review when the assignee completes the task. If the route owner promotes the task, indicating approval, the state changes to Complete. If the owner demotes the task, indicating rejection, the state returns to Assigned so the assignee can redo the task.
- **Complete**—For tasks that do not have the Needs Owner Review icon, when the assignee indicates a task is complete by clicking Complete, the state changes to Complete and the next task in the route is created (provided there are no other tasks that must be completed).

Instructions—Instructions to the assignee about how to perform the task.

Comments—Ad hoc comments entered by the task assignee when completing the task. This field is not required for tasks with Notify Only actions.

Route Owner Review—If you want to review a task after the assignee completes it, choose Yes.

The Needs Owner Review  icon displays for the task on the Tasks pages. After the assignee completes the task, the system notifies you. After reviewing the task, you must enter a review comment and then either promote the task to indicate approval or demote it to indicate rejection. The system does not create the next task in the route until you promote the task. Demoting the task changes its state back to Assigned and the assignee must recomplete the task based on your comments. When demoting the task, you can reassign it to someone else to work on.

Review Comments—Only for tasks marked with Needs Owner Review and that are in the Review state, which occurs after the task assignee completes the task. The route owner must enter review comments before promoting or demoting the task. If demoting the task, the comments should explain what the task assignee should do to complete the task.

7. Click **Done**.


Processing a Task that Needs Owner Review

When the assignee completes a task marked as Needs Owner Review, the route owner must review the task and indicate approval or rejection. The task does not proceed to the Complete state until the route owner approves it. When the task assignee completes a Needs Owner Review task, the route owner receives notification.

For instructions on defining a task as Needs Owner Review, see [Defining the Tasks in a Route](#).

To process a task that needs owner review

1. From the IconMail Task for Review notification, click the link to open the category list and Properties/Content page for the task.
2. Review the task:
 - To see Comments and Approval Status that the assignee entered, look at the Properties section of the page.
 - To see content that the assignee edited or added, click the link in the Content section of the page.
3. Enter **Review Comments** in the Properties section of the page. If you plan on demoting the task, include instructions for the task assignee about how the task should be completed.

4. To reassign the task to someone else to complete (only if you will demote the task), click  next to the **Assignee** to select the person you want to complete the task. See [Delegating a Task to Someone Else](#).
5. Indicate your approval or rejection of the task by clicking the appropriate link from the task Properties page.
 - To approve the task, click **Promote** from the page Actions menu.

The task is promoted to Complete and the system sends a Review Complete notification to the task assignee that indicates you promoted the task. The system creates the next task in the route (if no other tasks must be completed).

Or
 - To reject the task, click **Demote** from the page Actions menu.

The task is demoted to Assigned and the system sends a Review Complete notification to the task assignee that indicates you demoted the task. If you assigned the task to someone other than the original assignee, the new assignee receives the notification. You will be notified when the assignee recompletes the task.

Deleting a Task from a Route

You can delete a pending task from any route that you own. You cannot delete active or completed tasks.

To delete a task from a route

1. From the global toolbar, click **My Desk>Routes>My Routes**.

Or

If you are working within an object, click **Routes** from the object's category list.
2. From the Routes page, click the Name of the route.
3. From the category list for the route, click **Tasks**.
4. From the Tasks page, check the pending tasks you want to delete.
5. Click **Delete** from the page Actions menu.

The system presents a confirmation message.
6. Click **OK**.

Routes: Member Access

This section contains these topics:

- [Understanding Route Accesses](#)
- [Listing Route Members](#)
- [Adding and Removing Route Members and Defining Access](#)

Understanding Route Accesses

The route creator assigns access to a route by adding members to the route. Route members can be assigned multiple tasks. Every route member must be assigned at least one task before starting the route. When you start a route, the system removes any

members who do not have at least one task assigned. Being a route member gives you at least Read access to the route, which means you can view the route and its tasks.

In Team Central, if the route's scope is a folder or subfolder, only members with Read access to the folder/subfolder can be added to the route. Also, the route creator can assign Add, Remove, or Add Remove access to members as needed, which gives members the ability to add and remove route content. Route accesses are for the route itself and not for the individual items being routed. Access to route content is defined separately for each content item. For example, a person with Add Remove access to the route can add content to the route but cannot edit a document in the route unless the person has Write and Remove access for the document, which is specified within the folder the document is added to.

This list describes the actions Team Central members can perform for each route access level:

Read—Every person, group and role included in the route is assigned at least Read access for the route. This means the member can view the category list and Properties page for the route, including all tasks, history, and accesses for the route. The member can also view and download route content but only the items the person has Read access to are listed. Read access also lets members subscribe to the route.

Read Write—A person with Read Write access to the route has Read permissions and can also check in files to the route.

Add—A person with Add access to the route has Read Write permissions and can also add new content to the route.

Remove—A person with Remove access has Read Write permissions and can also remove content from the route.

Add Remove—A person with Add Remove access has the accesses defined for both Add and Remove access.

Listing Route Members

You can view the members in any route that you created or that you are included in.

To list the members included in a route

1. From the global toolbar, click **My Desk>Routes>My Routes**.



Or





If you are working within an object, click **Routes** from the object's category list.



2. From the Routes page, click the Name of the route.
3. From the category list for the route, click **Access**.

The Access page opens, listing all the members who are included in the route. These are the people, groups and roles who can access the route and who can be assigned tasks. If the check box next to a member's name is grayed, the member's task has already been created. People who have temporary access to the route because a task assignee delegated the task to them are not listed. In Team Central, Workspace Leads for the workspace can also view routes, even if they are not a route member.

R-0000101 : Add Members

Actions ▾  

<input type="checkbox"/>	Name ▲	Type	Organization	Access
<input type="checkbox"/>	 Buyer	Role		Read
<input type="checkbox"/>	 Comp1 Buyer1, Joe1	Person	Comp1 BuyerCo	Read
<input type="checkbox"/>	 Comp1 Buyer2, Joe2	Person	Comp1 BuyerCo	Read
<input type="checkbox"/>	 Comp1 Buyer3, Joe3	Person	Comp1 BuyerCo	Read

For each member in the route, the page shows:

Name—The name of the person, group or role added to the route.

Type—Distinguishes between people added individually, groups, and roles.

Organization—The organization the person belongs to. This is blank for groups and roles.

Access—Shows the access each member has for the route. When members are added to the route, their access is Read Write but the route creator can set a higher access level. These accesses are for the route itself and not for the individual items being routed. Access to route content is defined separately for each content item. For example, a person with Add Remove access to the route can add content to the route but cannot edit or delete a document in the route unless the person has Write and Remove access for the document. For a description of each access level, see [Understanding Route Accesses](#).

Adding and Removing Route Members and Defining Access

Route members are the people, groups and roles who can be assigned tasks for the route and who will be able to access the route when it is started. The route creator can add members to the route, even after the route has started. The creator can also remove a member as long as there are no tasks assigned to the member. In Team Central, Workspace Leads can view any route in the workspace even if they are not a member of the route.

In Team Central, only workspace members who have at least Read access to the route's scope item can be included in the route. In other MatrixOne applications, you specify when you create the route whether you want route membership limited. You can add these types of members to a route.

- **People**—People added individually to the route.
- **Buyer Desk Person**—People added to the workspace because they belong to an associated Buyer Desk. This is available only if Team Central is installed.
- **Role**—When the system creates the task assigned to the role, it notifies all people who belong to the role. The first person who accepts the task is designated as the task assignee and can complete the task.

- **Group**—When the system creates the task assigned to the group, it notifies all people who belong to the group. The first person who accepts the task is designated as the task assignee and can complete the task.

All route members will be able to access the route once you start it and you can assign one or more tasks to any route member. Every route member must be assigned at least one task before starting the route. When you start a route, the system removes any members who do not have at least one task assigned. If you are creating this route based on a route template that includes members, the template members are already listed. You can remove these members, add new ones, change their route access, or leave them unchanged.

To add or remove members from a route and define route accesses

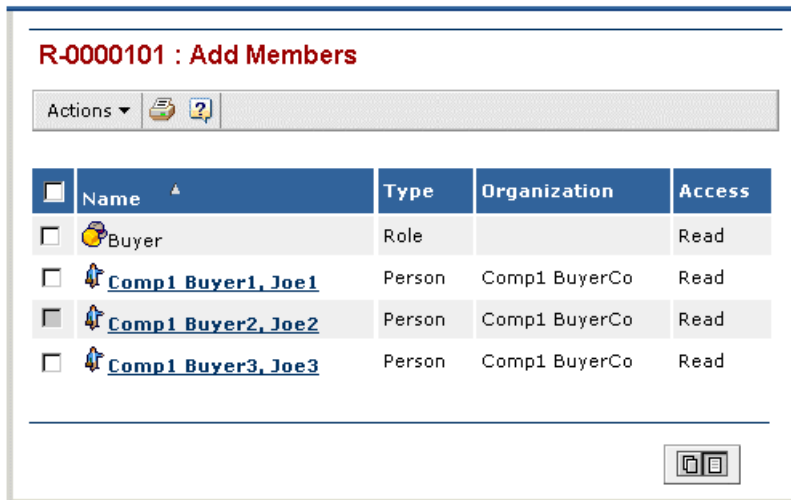
1. From the global toolbar, click **My Desk>Routes>My Routes**.

Or

If you are working within an object, click **Routes** from the object’s category list.

2. From the Routes page, click the Name of the route.
3. From the category list for the route, click **Access**.

The Access page opens, listing all people, groups and roles who can be assigned tasks for the route.



4. Add members to the route. From the page Actions menu, select what type of members you want to add: **Add People**, **Add Group**, **Add Role**, or **Add Member List**.

The Search page for your selections opens. Search and select members to add to the route.

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. For details, see “Finding and Selecting People” in *AEF Help*.

The members you choose are added to the Route Access page. All route members have Read Write access to the route by default. You can choose a higher access level for members as needed.

5. Remove any members that you do not want to assign a task to. For example, if the route was created based on a template, you may want to remove some members who were saved with the template. If you added a member list, you might want to remove some of the people on the member list.

- a) Check the members you want to remove from the route.
 - b) Click **Remove** from the page Actions menu.
 - c) At the confirmation message, click **OK**.
6. Assign access levels for the route by clicking **Edit Access** and choosing the appropriate access for each person.

These accesses are for the route itself and not for the individual items being routed. Access to route content is defined separately for each content item. For example, a person with Add Remove access to the route can add content to the route but cannot edit or delete a document in the route unless the person has Write and Remove access for the document.

Read—Every person, group and role included in the route is assigned at least Read access for the route. This means the member can view the category list and Properties page for the route, including all tasks, history, and accesses for the route. The member can also view and download route content but only the items the person has Read access to are listed. Read access also lets members subscribe to the route.

Read Write—A person with Read Write access to the route has Read permissions and can also check in files to the route.

Add—A person with Add access to the route has Read Write permissions and can also add new content to the route.

Remove—A person with Remove access has Read Write permissions and can also remove content from the route.

Add Remove—A person with Add Remove access has the accesses defined for both Add and Remove access.

Routes: Content

This section contains these topics:

- [Listing Content for a Route](#)
- [Defining Content for a Route](#)

Listing Content for a Route

You can list the content of any route that you created or that you are included in. In Team Central, Workspace Leads can list content for any route in the workspace. The Content page lists all the items added to the route.

See [Viewing Documents and Content](#) in Common Document Management.

Defining Content for a Route

The route creator can define the content of a route at any point up until the route is Finished. Team Central route members with Add access to the route can add content from the workspace, and members with Remove access can remove content as needed until the route is Finished. If Team Central or Program Central is installed, members who have access can add content from a local directory.

To define content for a route

1. From the global toolbar, click **My Desk>Routes>My Routes**.

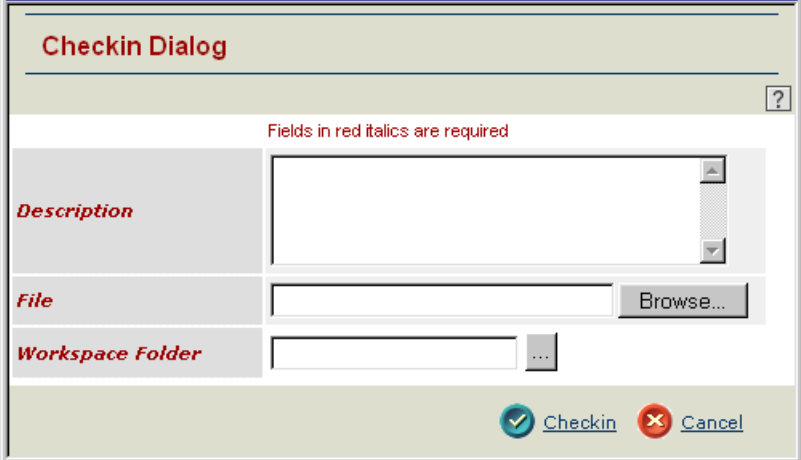
Or


If you are working within an object, click **Routes** from the object's category list.

2. From the Routes page, click the Name of the route.
3. From the category list for the route, click **Content**.
4. To add general content, click **Add Content**. This allows you to add any database content. For example, if Engineering Central is installed, you can add parts, ECRs, ECOs, etc. Search and select database items that you want included in the route. For details, see [Using Search](#).
5. To add documents that have not been added to the database but are in a local directory:
 - a) From the Add Content page, click **Upload External File**. This option is shown only if Team Central or Program Central is installed.

Depending on how your system is set up, a File Checkin/Checkout Login page may appear. If so, enter the same **Username** and **Password** that you enter when logging into MatrixOne application and click **Login**.

The Checkin Dialog page appears.



- a) Enter a **Description** for the file.
- b) In the **File** box, click **Browse** to select the file.
- c) Specify a folder or subfolder to add the document to by clicking  for the **Workspace Folder** box. From the list of folders for which you have Read access, choose a folder. If the route's scope is a folder or subfolder, then only that folder or its subfolders can be chosen.
- d) Click **Checkin**.

The file is added to the Content page.



To specify a blocked state for a route

1. To specify a Blocked State for non-document items (only for items that have more than one state in their lifecycle):
 - a) From the Content page, click **Edit Lifecycle Blocks**.

Edit Lifecycle Blocks

?

Name ▲	Ver.	Rev	State Condition
DesignSpec39282.doc	1		(none)
Pkg 100		-	Started ▼

 Done
  Cancel

- b)** Choose the state from the **State Condition** column. To remove a blocked state, choose (none).

If you specify a block promotion state for an item, the system prevents the item from being promoted from that state until the route is completed. For example, suppose a buyer is routing an RFQ to be reviewed internally before sending it to suppliers. The buyer can make sure the RFQ is not sent to suppliers until the route (and associated review) is complete by specifying Initial Review as the block promotion state. Similarly, suppliers can make sure a quotation is not returned to the buyer until its route (which lets others in their company review it) is complete by choosing Review as the block promotion state.

State-based blocking must be enabled by the Matrix Business Administrator. See the Common Components Administrator Guide for details.

2. To remove an item from the route:
 - a) From the route Content page, check the items you want to remove.
 - b) Click **Remove** from the page Actions menu.
 - c) At the confirmation message, click **OK**.
3. Click **Done**.

Tasks Assigned to You

A *task* is a request that you perform some activity—such as review, comment, or approve information—by a particular date and time. Tasks are assigned when a route is created or modified. The route that is associated with a task may contain documents and other items such as parts, quotations and Requests for Quotes. You can be assigned more than one task for a route.

This section includes these topics:

- [Listing Your Active and Completed Tasks](#)
- [Viewing Information about Your Assigned Tasks](#)
- [Listing Sub-Routes for a Task](#)
- [Creating a Sub-Route for a Task](#)
- [Accepting a Task Assigned to a Group or Role](#)
- [Setting a Due Date for Your Task](#)
- [Delegating a Task to Someone Else](#)
- [Completing a Task](#)
- [Processing a Rejected Task](#)

Listing Your Active and Completed Tasks

When a route that you are included in is started, you can immediately see the route in your list of routes. If you are assigned a task in the route, it won't be listed in your task list until the prior route tasks are completed and it's your turn to complete your task. When you first open the task lists, only active tasks are listed but you can see completed tasks using the filter list.

Tasks assigned to you can be deleted and if they are, you are notified. The route owner can delete tasks. Another reason tasks are deleted is if the route owner defines several tasks to be assigned at once and specifies that only one needs to be completed.

To list your active and completed tasks

1. To list all your assigned tasks, click **My Desk>My Tasks** from the global toolbar.

Or

In Team Central, to list assigned tasks for a particular workspace, click **My Desk>Team>Workspaces** from the global toolbar and then click the Name of the workspace. From the workspace category list, click **Tasks**.

The Tasks pages shows your tasks. Use the filter in the upper right to select which tasks you want to view: All tasks, Active, Complete, Tasks to be Accepted.

Tasks								Active
Name ▲	Action	Task Instruction	Due Date	Due Time	Route	WorkSpace		
<input type="checkbox"/> Check figures	Investigate	Please check the figures on page 34.	May 31, 2002	10:00:00 AM	Spec Review	Workspace 200		
<input type="checkbox"/> Comment	Comment	Please add your changes.	May 14, 2002	1:00:00 PM	Route 100	Workspace 100		

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Status—The icons in this column show if the task is late. A green arrow means the task is on time and a red square means it is late.

Name—The task name specified by the route creator. If the route creator didn't specify a name, the system automatically generates it. To get more information about a task, click its **Name**.

Action—The action the route creator requests that you perform: Approve, Comment, Investigate, Information Only, or Notify Only. If the action is Approve, you must choose an approval status to complete the task: Approve, Reject, or Abstain. All actions except Notify Only require that you enter a comment to complete the task.

Task Instructions—The instructions the route creator included for you.

Due Date/Time—The date and time by which the route creator requests you complete the task, if specified. If the task is overdue (the due date has passed and the task is not yet completed), its status is red. If there is no due date, the route creator didn't specify one and you can enter one if you choose to.

Route—The name of the route the task belongs to. To see details about the route—including route members, other tasks for the route, comments people have entered, and approval statuses people have chosen—click the Route name.

Content—Contains the number of items included in the route content. Clicked the number to open the Content page. See [Listing Content for a Route](#).

Workspace—Shows the Team Central workspace the route is associated with. If no workspace is listed, then the route has been created from another application, such as Engineering Central or Program Central.

- To see all tasks, including your completed tasks, choose **All Tasks** from the filter list.

Viewing Information about Your Assigned Tasks

This procedure describes how to view information about tasks that are assigned to you and are ready to be completed or that you have already completed.

You can also view information about your pending tasks (those not yet active) and about tasks assigned to any person in a route, including those assigned to other people, as long as you belong to the route or you created the route. For instructions, see [Viewing Information about Any Route Task](#).

To view information about an assigned or completed task

- Access the Properties page for the task.

- If the task is active, the fastest way to access the task is to click **My Desk>My Tasks** from the global toolbar and then click the task Name.
Or
- For Team Central users, click the task Name from **My Desk>Team>My View**.
Or
- From the category list for the Team Central workspace the task belongs to, click **Task** and then click the task Name.

The category list and Properties/Content page for the task opens. From this page, you can delegate or complete the task, set the task's due date and time, or access the task's content.

check design : Summary View

Actions ▾ ?

Properties

Owner	Tesser
Originated	Jul 3, 2003 2:51:10 PM
Due Date	Jul 16, 2003 10:00:00 AM
Allow Delegation	Yes
Assignee	Tesser
Route	R-0000100
Action	Approve
Approval Status	
State	Assigned
Instructions	Review and approve
Comments	

Content

Name	Actions	Description	State Condition
PT-5000		Development part for assembly XYZ	(none)

The page is divided into two sections. The top section shows task properties. The bottom section contains basic details about the task's content.

Properties include the following:


Owner—The person who created the route.

Originated—Date the task was last defined by the route owner.

Due Date/Time—The date and time the route owner requests that you complete the task, if specified. If you do not complete the task by this date, the task is marked as late (red) and the route's status is changed from green to yellow (if it's the last task in the route, the status changes to red). If the route or workspace owner has set up late

task notifications, the system sends out notifications to the appropriate people. If there is no due date, the route creator didn't specify one and you can enter one if you choose to.

Allow Delegation—If Yes, the assignee can delegate the task to another person. The system can also delegate the task automatically if the recipient receives the task during a defined absence period and an Absence Delegate has been assigned. See [Editing Your Profile](#). If No, then neither the assignee nor the system can delegate the task.

Assignee—The person responsible for completing the task. This is the person the route creator assigned to the task unless the task was delegated to someone else. If task delegation is allowed, this is an editable field. Click  to select the person you want to complete the task. See [Delegating a Task to Someone Else](#).

Route—Name of the route that contains the task. To see details about the route, click its name.

Action—The action the assignee should perform: Approve, Comment, Notify Only, Information Only or Investigate. If the action is Approve, you must choose an approval status to complete the task: Approve, Reject, or Abstain. All actions except Notify Only require that you enter a comment to complete the task.

Approval Status—For tasks with Approve actions, this field shows the option the task assignee chose: Approve, Reject, or Abstain. If the assignee chooses Approve or Abstain and completes the task, the route continues as normal, and new tasks are created when the ones for the current order are completed. If a person chooses Reject for the status and completes the task, the route is stopped, which means no new tasks are activated for the route. The route creator receives email and IconMail notification about the rejection.


State—Assigned or Complete. When a task is created for an assignee, its state is Assigned. When the assignee indicates the task is complete, the state changes to Complete.

Instructions—Describes how to perform the task.

Comments—Ad hoc comments entered by the task assignee when completing the task. This field is not shown for tasks with Notify Only or Information Only actions.

2. Work with the task, as needed:
 - To complete the task, click the appropriate link from the page Actions menu. These links are available only for the task assignee. See [Completing a Task](#).
 - To view details about the route or content object, click its name.

- Use the category list for the task to see more information:

Category	Description	For details, see:
Properties	Shows the Properties page for the task.	Viewing Information about Any Route Task
Content	Provided you have the appropriate access to the content item, the Route Content page lets you view, download, lock for edit, and check in new versions of documents in the route and work with other route content. For example, you can only edit documents that you have at least Read Write access to.	The Route Content page for a task is just like the Content page for the route, described in Listing Content for a Route , except there are no links for adding and removing content. To add and remove content for the route, you must access the Content page for the route. See Defining Content for a Route .
History	Shows a log of events that have occurred for the task.	Click  on the History page or see AEF Help .
Route	Shows sub-routes created to complete the task.	Listing Sub-Routes for a Task

Listing Sub-Routes for a Task

A sub-route for a task is a route that the task assignee creates to help complete the task. For more information about sub-routes, see [Creating a Sub-Route for a Task](#).

To list the sub-routes for a task assigned to you

- Access the category list and Properties page for the task.
 - If the task is active, the fastest way to access the task is to click **My Desk>My Tasks** from the global toolbar and then click the task Name.
Or
 - For Team Central users, click the task Name from **My Desk>Team>My View**.
Or
 - From the category list for the Team Central workspace the task belongs to, click **Task** and then click the task Name.
- From the category list for the task, click **Route**.

A Routes page displays, listing all sub-routes for the task. This page is just like the top-level Routes pages. See [Listing Routes](#).

Creating a Sub-Route for a Task

A sub-route for a task is a route that the task assignee creates to help complete the task. For example, suppose a task requires that you approve a document, but you want other people's feedback before you enter your approval. You can create a sub-route to gather information from the other people and then complete your task. If needed, you can create multiple sub-routes for a task. A task cannot be completed until its sub-routes are complete.

If you have Create Route access, you can create one or more sub-routes for any task that you are assigned. The steps for creating a sub-route are very similar to the steps for creating a route, with the following exceptions:

- The sub-route creator can choose whether the sub-route is displayed to other people who have access to the parent route (the parent route creator, other members of the parent route, and Team Central Workspace Leads). The Sub-Route Visibility options are available on the last page of the Create Route wizard and on the Create Route page when not using the wizard.
- The due dates for tasks in sub-routes cannot be later than the due date for the parent route's task. When you start the sub-route, the system notifies you if any task due dates are later than the parent task's due date. Similarly, if a task assignee sets a due date that is later than the due date for the parent route's task, the system displays an error message.

The following exception is for Team Central:

- The scope for sub-routes is always the parent route's workspace, even if the parent route's scope is more limited. So even if the parent route's scope is a folder, the task assignee can add members and content from the entire workspace to a sub-route.

Also note these characteristics of sub-routes:

- If a task that has sub-routes is deleted, the sub-routes and all of its tasks are also deleted. People who have current tasks assigned are notified. A task might be deleted because the route owner deletes it or because another task of the same order was completed and the tasks were defined with the Any completion option.
- If you delegate a task for which you have created a sub-route, you remain the owner of the sub-route, not the delegate.

To create a sub-route for a task

1. Access the category list and Properties page for the task.
 - If the task is active, the fastest way to access the task is to click **My Desk>My Tasks** from the global toolbar and then click the task Name.
Or
 - For Team Central users, click the task Name from **My Desk>Team>My View**.
Or
 - From the category list for the Team Central workspace the task belongs to, click **Task** and then click the task Name.
2. From the category list for the task, click **Routes**.
3. From the Routes page, click the appropriate link at the top of the page:
To fill in only basic information for sub-route and define tasks, members, and content separately, click **Create New**. For instructions, see [Creating a Route: Basic Information Only](#).
To use the route wizard to enter all the information for the route, click **Route Wizard**. For instructions, see [Creating a Route: All Route Information](#).

Accepting a Task Assigned to a Group or Role

When the route creator assigns a task to a group or role and that task is created, the system notifies everyone assigned to the group or role. Before the task can be completed, one of the recipients must accept the task, which assigns the task to that person. The first person

who accepts the task becomes the new assignee and no one else can complete the task (unless the assignee delegates the task).

To accept a task assigned to a role that you belong to

1. Open the New Task Assignment Notice that the system sent to you:
 - a) From the global toolbar, click **Tools>IconMail**.
 - b) From the IconMail page, click the **Subject** of the New Task Assignment Notice.
2. From Mail Properties, click the link in the **Message** row to open details about the task.
3. From the Actions menu on the Properties/Content page for the task, click **Accept Task**.

The system changes the task assignee from the group or role name to your name and notifies other group or role members that you have accepted the task. You are the only person who can complete the task now and you do so as you would any task. See [Completing a Task](#).

Setting a Due Date for Your Task

If the route creator did not enter a due date/time for your task, you can enter one. You may want to enter a date to let other route members know when you plan to complete the task. After setting the due date, the task status flags will show whether the task is on time or late.

If the task is part of a sub-route, the due date you enter cannot be later than the due date for the parent task.

To set a due date for a task you are assigned to

1. From the global toolbar, click **My Desk>My Tasks**.
2. From the Tasks page, click the Name of the task you want to set a due date for. The category list and Properties page for the task opens.
3. From the Actions menu on Properties page for the task, click **Edit Details**.
4. From the Edit Task Details page, choose a **Due Date/Time** by clicking the Calendar icon. For instructions on using the Calendar, see *AEF User Help*.
5. Click **Done**.

Delegating a Task to Someone Else


If you are assigned a task and the route owner has indicated that you can delegate the task (Allow Delegation is set to Yes), you can make someone else the assignee for the task. You can delegate the task to any user in your company.

When you delegate a task to someone, that person becomes the new task assignee and is now the only person who can complete the task. The assignee inherits all the accesses that you have for the route and its content and receives notifications sent by the system regarding the task. However, these access are only temporary and are removed when the route is completed. The original assignee's access to the route and content remains and the list of members for the route continues to list the original assignee and not the delegate.

If you delegate a task for which you have created sub-routes, you remain the owner of the sub-routes. The new task assignee cannot complete the task until your sub-routes are complete.

Only the original task assignee can delegate the task. The delegate can not delegate the task again.

To delegate an active task to someone else

1. From the global toolbar, click **My Desk>My Tasks**.
2. From the Tasks page, click the Name of the task you want to delegate.
The Properties/Content page for the task opens.
3. Click  for the **Assignee** field. This is available only if Allow Delegation is set to Yes.

The Find Person page opens.

- a) Enter search criteria for the person.


Last Name, First Name—To search by a person’s name, enter the person’s first/last name. To enter part of a person’s first/last name, use the wildcard * to represent any number of characters. For example, to search for “Joseph Huenoth”, you could enter “Hue*” for the Last Name. The search is case sensitive so use the correct capitalization. If you don’t want to search by name, leave the * in the box.

Role—To search for people assigned to a particular role, choose the role or choose All Roles.

Group—To search for people assigned to a particular group, choose the group or choose All Groups.

- b) Click **Find**.
- c) From the Select Person page, choose the person you want to delegate the task to.
- d) Click **Done**.

To delegate a pending task to someone else

1. If the task has been assigned to you but is not yet active, click **My Desk>Routes>My Routes** from the global toolbar, then click the Name of the Route. From the category list for the route, click **Tasks**.
2. From the Tasks page, click the Name of the pending task you want to delegate.
The Properties page for the task opens.
3. From the Properties page for the task, click **Edit Details**.
4. From the Edit Task Details page, click  for the **Assignee** field. The Find Person page opens.

- a) Enter search criteria for the person.

Last Name, First Name—To search by a person’s name, enter the person’s first/last name. To enter part of a person’s first/last name, use the wildcard * to represent any number of characters. For example, to search for “Joseph Huenoth”, you could enter “Hue*” for the Last Name. The search is case sensitive so use the correct capitalization. If you don’t want to search by name, leave the * in the box.

Role—To search for people assigned to a particular role, choose the role or choose All Roles.

Group—To search for people assigned to a particular group, choose the group or choose All Groups.

- b) Click **Search**.
- c) From the Select Person page, choose the person you want to delegate the task to.
- d) Click **Done**.

Completing a Task

The steps you need to perform to complete a task differ depending on the Task Action chosen and instructions entered by the route creator. At a minimum, you must read and follow the instructions for the task and then mark the task as completed. You may also have to enter comments, choose an approval option, or review, edit, or add routed content.

If you (or the original task assignee) created sub-routes for the task, the sub-routes must be complete before you can complete the task.

To complete an active task

1. From the global toolbar, click **My Desk>My Tasks**.
2. From the Tasks list, click the Name of the task you want to complete.

The category list and Properties/Content page opens for the task.

check design : Summary View

Actions ▾ ?

Properties

Owner	Tesser
Originated	Jul 3, 2003 2:51:10 PM
Due Date	Jul 16, 2003 10:00:00 AM
Allow Delegation	Yes
Assignee	Tesser
Route	R-0000100
Action	Approve
Approval Status	
State	Assigned
Instructions	Review and approve
Comments	

Content

Name	Actions	Description	State Condition
PT-5000		Development part for assembly XYZ	(none)

3. Read the **Instructions** that the route creator entered for you.

4. If the instructions involve working with route content:
 - a) Click the content Name from the content section at the bottom of the page.
 - b) Work with the content as instructed. You must have the appropriate access for each content item to be able to work with the item. For Team Central, you must also have the appropriate access for the route to be able to add and remove content. For example, you can only edit documents that you have at least Read Write access to. To add and remove content from the route, you must have Add Remove access for the route.

For instructions on working with route content, such as viewing or editing content, see [Listing Content for a Route](#). For instructions on adding and removing content from the route, see [Defining Content for a Route](#).
5. To add new content to the route or remove content, access the Content page for the route:
 - a) From the task's Properties/Content page, click the **Route** name.

The category list and Properties page opens for the route.
 - b) From the category list for the route, click **Content**.
 - c) Work with the content as instructed.

You must have the appropriate access for each content item to be able to work with the item. For Team Central, you must also have the appropriate access for the route to be able to add and remove content. For example, to add and remove content from the route, you must have Add Remove access for the route.

For instructions on working with route content, such as viewing, editing, adding, and removing content, see [Routes: Content](#).
6. If the Task Action is Approve, Comment, or Investigate:
 - d) Enter **Comments** for the task.
 - e) If the page contains approval options (only if the Task Action is Approve), choose the appropriate **Complete Task Action** option from the page Actions menu: Approve, Reject, Abstain.

Approve. Indicates that you approve the information you have been requested to approve. For example, if the task instructions indicate that you should approve a document in the route content and you do approve the document, you should choose Approve. When you complete a task by choosing Approve for the Approval Status, the system continues the route normally.

Reject. Indicates that you reject the information you have been requested to approve. When you complete a task by choosing Reject for the Approval Status, the route is stopped and the route creator receives email and IconMail notification that you rejected the route.

Abstain. Indicates that you abstain from approving the information you have been requested to approve. When you complete a task by choosing Abstain for the Approval Status, the system continues the route normally.
7. If the Task Action is Notify Only or Information Only, click **Complete** from the page Actions menu.

After completing the task, the system promotes the task to Complete and enters the current date for the Completion date. The task is no longer on your Tasks pages, but you can still access the task through the route (unless the task was delegated to you and you do not have access to the route independently). If no one else needs to

complete a task for this order number in the route, the tasks at the next order number become active. Those task assignees are notified that they have active tasks. If you are the last person to complete a task for the route, then the route is complete.

If the task is not designated as Needs Owner Review, the system promotes the task to Complete.

If the task is designated as Needs Owner Review, the system promotes the task to Review and notifies the route owner. After reviewing the task, the owner approves or rejects it. If approved, the system promotes the task to Complete and notifies you. If rejected, the system demotes the task to Assigned and notifies the assignee, which could be someone other than you if the route owner reassigns it.

When a task is promoted to Complete, the system enters the current date for the Completion date. If no one else needs to complete a task for this order number in the route, the tasks at the next order number become active. Those task assignees are notified that they have active tasks. If you are the last person to complete a task for the route, then the route is complete.

Processing a Rejected Task

After the task assignee completes a task that is marked as Needs Owner Review, the task is promoted to the Review state and the route owner reviews the task. If the owner approves the task, the system promotes the task to Complete and notifies the task assignee. If the owner rejects the task, the system demotes the task back to Assigned and notifies the assignee. The task assignee must complete the task again based on the review comments the route owner entered.

When rejecting a task, the route owner may reassign the task to someone other than the original assignee. The new assignee receives the notification and must complete the task. This means you might receive a notification about a task that is rejected even though you didn't work on the task originally.

You complete a rejected task in the same way you complete a new task, as described in [Completing a Task](#). The only differences are:

- You, the task assignee, will receive a Review Complete notification about the task and can click the hyperlink in the message to access details about the task. Alternatively, you can click the task's Name from the Tasks pages as you would any Assigned task.
- Review the information on the Properties page for the task, focusing especially on the Review Comments. These are comments the route owner entered to explain how the task should be completed. Also look for updated information in the other fields, such as new Instructions, a new Due Date/Time, and a different Action.

Route Templates

Use route templates to speed up the process of creating a route that is similar to one you have already created. A route template saves the components of a route that are frequently reused, including the:

- route description
- route members (included optionally)
- tasks definitions

The components of a route that are typically unique for each route—the route name, the content being routed, and the access levels assigned to route members—are not saved in the template.

A route template's availability determines who can use the template to create routes. A route template's availability can be:

- User—Only the template owner can use it. Any person can create a User route template.
- Enterprise—Anyone can use the template to create a route. Only Company Representatives can create Enterprise-level route templates.

This section includes these topics:








- [Listing Route Templates](#)
- [Viewing Information about a Route Template](#)
- [Saving a Route as a Template](#)
- [Listing Route Template Members](#)
- [Listing Previous Revisions of a Route Template](#)
- [Listing and Editing Tasks for a Route Template](#)
- [Revising a Route Template](#)
- [Editing Details for a Route Template](#)
- [Deleting a Route Template \(Revision\)](#)



Listing Route Templates

You can get a list of route templates that includes all route templates that you own, the Enterprise-level templates for your company, and for Team Central users, Workspace-level templates for workspaces that you belong to. For Company Representatives, the list includes all templates created by employees of your company.

To list route templates

1. From the global toolbar, click **My Desk>Routes>Route Templates**.

Route Templates							
Actions  							
<input type="checkbox"/>	Name	Rev	Description	Availability	Workspace Availability	Owner	
<input type="checkbox"/>	RouteTemplate-3214	0	Product development	User		Smith, Michael	
<input type="checkbox"/>	RouteTemplate-3215	1	Camshaft Diagram	Enterprise		Schmidt, Becky	
<input type="checkbox"/>	RouteTemplate-3216	0	Circuit Board Change	User		Smith, Michael	
<input type="checkbox"/>	RouteTemplate-3217	4	Jet Engine Turbine Blade	Workspace	Workspace-5000	Maguire, Padraig	

Page 1 of 10  

For each template the page shows:

Name—The name assigned by the person who saved the template. To see details about the template, click its Name.

Rev—The revision number for the template. Each time a template is updated and saved, the system increments the revision number. The page shows only the highest revision of each template.

Description—A summary of the template’s purpose.

State—Shows if the template is active or inactive.

Route Base Purpose—Shows the kind of tasks included in the route.

- Standard—The route can include tasks that require the assignee’s approval or comment or tasks intended only for notification or information.
- Approval—The route includes only tasks that require the assignee’s approval.
- Review—The route includes only tasks that require the assignee’s comment.

Availability—Defines who can use the template to create routes. User means the template owner is the only person who can use the template. Enterprise means the template is available to all.

Owner—The person responsible for maintaining the template.

Scope—All or Organization. For templates whose scope is a workspace, folder or project space, this lists the Team Central workspace or folder, or the Program Central project space where the template can be used.

2. To delete a template, check it and click **Delete Selected**. See [Deleting a Route Template \(Revision\)](#).
3. To view details about a template, click its Name. See [Viewing Information about a Route Template](#).

Viewing Information about a Route Template

You can view information about any route template listed on your Route Templates page. This list includes all route templates that you own, the Enterprise-level templates for your company, and (for Team Central users) Workspace-level templates for workspaces that you belong to. For Company Representatives, the list includes all templates created by employees of your company.

To view information about a route template

1. From the global toolbar, click **My Desk>Routes>Route Templates**.
2. From the Route Templates page, click the Name of the template you want to view.
The category list and Properties page for the template opens.

route template 1 : Properties	
Actions	
Name	route template 1
Revision	1
State	Active
Owner	Comp1 Buyer1,Joe1
Originator	Comp1 Buyer1,Joe1
Availability	Company Name
Scope	All
Originated	Jan 6, 2004
Description	template for review document
Route Task Edits	Modify/Delete Task List
Route Base Purpose	Standard

Name—The name assigned by the person who saved the template.

Revision—The revision number for the template. Each time a template is updated and saved, the system increments the revision number.

State—Whether the template is in an Active or Inactive state. Templates in the Inactive state cannot be used to create routes.

Owner—The person responsible for the template.

Originator—The person who saved the template version.

Availability—Defines who can use the template to create routes. User means the template owner is the only person who can use the template. Enterprise means the template is available to everyone.

Scope—Defines who can be included in routes created from this template: All, Organization, or members of the specified Team Central workspace or the specified Program Central project space only.

Originated—The date the template or template revision was created.

Description—A summary of the purpose of the template.



Route Task Edits—Defines how people who create routes based on the template can edit the task list. The options range from the most restrictive at the top to the least restrictive. The editing restrictions are related to adding and removing tasks, changing the task order, and changing the task name only. The route owner can edit all other fields, such as task assignee, instructions, and due dates, no matter what the Route Task Edit option is.

- **Maintain Exact Task List**—People who create a route from this template must use the exact task list, with no tasks added or removed. The route creator cannot make any changes to the task order or names, but all other fields can be changed.

- **Extend Task List**—People who create a route from this template must use the exact task list, but more tasks can be added to an existing route task order or a new order number. The route creator cannot make any changes to the order or names of tasks from the route template, but can change all other fields. The route owner can make any changes to tasks the owner adds to the route.
- **Modify Task List**—People who create a route from this template can change all information for template tasks except the task name. The route creator can add new tasks but cannot delete template tasks.
- **Modify/Delete Task List**—People who create a route from this template can change and delete any task and can add new tasks.

Route Base Purpose—Determines which task actions are included in the route template.

- **Standard**—Can have several task actions.
 - **Approval**—All task actions are set to Approve.
 - **Review**—All task actions are set to Comment.
3. To make changes to the template, click **Edit Details** from the page Actions menu. See [Editing Details for a Route Template](#).
 4. To change the state of the route template, click Activate/Deactivate from the page Actions menu. This is visible only if you have promote/demote access for the template.
 5. Use the category list to work with the route template:

Category	Description	For details, see:
Access	Lists the route members saved with the template, if any.	Listing Route Template Members
Tasks	Lists the tasks in the template and lets the owner edit the task definitions (must create a new revision to make changes).	Listing and Editing Tasks for a Route Template
History	Shows a log of events that have occurred for the route template.	Click  on the History page or see <i>AEF Help</i> .
Lifecycle	Shows the current state of the route template and allows you to promote and demote it.	Click  on the Lifecycle page or see <i>AEF Help</i> .
Revisions	Lists the previous revisions of the template and lets you view history for all revisions.	Listing Previous Revisions of a Route Template

Saving a Route as a Template

Use route templates to speed up the process of creating a route that is similar to one you have already created. A route template saves the components of a route that are frequently reused, including the route members and task definitions. You can save as a template any route that you create.

To save a route as a template


1. Access the route that you want to save as a template by clicking **My Desk>Routes>My Routes** from the global toolbar. Then click the Name of the route.
2. From the Properties page Actions menu, click **Save As Template**.
The Save Route as Template page opens.

Save Route as Template

Fields in red italics are required

<i>Template Name</i>	<input type="text"/>
<i>Description</i>	<input type="text"/>
<i>Availability</i>	<input checked="" type="radio"/> User <input type="radio"/> Enterprise
Scope	<input type="radio"/> All <input type="radio"/> Organization
Route Task Edits	Modify/DeleteTaskList
Save Options	<input checked="" type="radio"/> Save as New Template <input type="radio"/> Revise Template
Template Data	<input checked="" type="checkbox"/> Task Assignees

Done Cancel

3. Enter a **Template Name**.
4. Enter a **Description** of the template. You might want to describe the kinds of routes that should be created using it and/or summarize the tasks and members.
5. Using the **Availability** options, choose who can use the template to create a route:
User—The template will be available only to you.
Enterprise—The template will be available to everyone. Only Company Representatives can create Enterprise-level route templates.
6. Using the **Scope** options, choose which persons can be added to routes created from this template. In Team Central and Program Central, the scope also limits the content that can be included in the route.
All—Any person in the database whose status is active.
Organization—Only employees of the route creator’s company, plus one other specified organization, can be included in the route.
workspace or project space—This option is available only if Team Central or Program Central is installed. Click the third button and click  to select a workspace (for Team Central) or a project space (for Program Central).

7. Use the **Route Task Edits** list to choose how people who create routes based on the template can edit the task list. The editing restrictions are related to adding and removing tasks, changing the task order, and changing the task name only. The route owner can edit all other fields, such as task assignee, instructions, and due dates, no matter what the Route Edit Task option is.

Maintain Exact Task List—People who create a route from this template must use the exact task list, with no tasks added or removed. The route creator cannot make any changes to the task order or names, but all other fields can be changed.

Extend Task List—People who create a route from this template must use the exact task list, but more tasks can be added to an existing route task order number or a new order. The route creator cannot make any changes to the order or names of tasks from the route template, but can change all other fields. The route owner can make any changes to tasks the owner adds to the route.

Modify Task List—People who create a route from this template can change all information for template tasks except the task name. The route creator can add new tasks but cannot delete template tasks.

Modify/Delete Task List—People who create a route from this template can change and delete any task and can add new tasks.

8. If the route was already based on a template that you created, the page includes Save Options. To save the route as a new template, choose **Save as New Template**. To save the route as a new revision of the template from which it was created, choose **Revise Template**.
9. If you do not want to save the route's member list with the template, uncheck **Task Assignees** in the **Template Data** field. The route template's Access page will be empty and the tasks will all be unassigned. When people use the template to create a route, they will have to add members and assign them to tasks before they can start the route.

Or

To save the route's member list and task assignments in the template, check **Task Assignees** in the **Template Data** field. The route template's Access page will contain the same members as the route's Access page and tasks will be assigned to the same members. You cannot remove members from the template but you can change the assignee for tasks and remove the assignees from tasks. See [Listing and Editing Tasks for a Route Template](#).

10. Click **Done**.

Listing Route Template Members



You can list the members included in any route template that is listed on your Route Templates page. Template accesses can be changed only by creating a new revision of the template.





To list members in a route template



1. From the global toolbar, click **My Desk>Routes>Route Templates**.
2. From the Route Templates page, click the Name of the template you want to work with.
3. From the category list for the template, click **Access**.

The Access page opens, listing all members saved with the template. Since route access levels are not saved with the template, the access levels are not listed.

route template 1 : Add Members

Actions ▾  

<input type="checkbox"/>	Name ▲	Type	Organization
<input type="checkbox"/>	 Buyer	Role	
<input type="checkbox"/>	 Comp1 Buyer1, Joe1	Person	Comp1 BuyerCo
<input type="checkbox"/>	 Comp1 Buyer2, Joe2	Person	Comp1 BuyerCo
<input type="checkbox"/>	 Comp1 Buyer3, Joe3	Person	Comp1 BuyerCo

Page 1 of 1  

Name—The name of the person, group or role included in the route template.

Type—Distinguishes between people added individually, groups, and roles.

Organization—The organization the person belongs to. This is blank for groups and roles.

Listing Previous Revisions of a Route Template



You can list previous revisions of any route template that is listed on your Route Templates page.





To list previous revisions of a template



1. From the global toolbar, click **My Desk>Routes>Route Templates**.
2. From the Route Templates page, click the Name of the template you want to work with.
3. From the category list for the template, click **Revisions**.

The Revisions page opens, listing all revisions of the template. The page shows the name, revision number, and creation date for each.

RouteTemplate-5000: Revisions

Show History  

Name	Rev	Create Date	
 RouteTemplate-5000	1	Dec 6, 2003 3:05:13 PM	
 RouteTemplate-5000	0	Nov 15, 2003 7:52:44 PM	

Page 1 of 10  

4. To view information about a revision, click its **Name**.

The category list and Properties page for the template revision opens. The category list and Properties page is the same as the pages for the highest revision, except you cannot edit a previous revision.

- To view the history for all revisions, click **Revision History** from the page Actions menu. The History page shows historical information for each revision starting with the most recent.

Listing and Editing Tasks for a Route Template

You can list the tasks included in any route template listed on your Route Templates page. Generally, only the current template owner can edit tasks for a template although Team Central Workspace Leads can change any Workspace-level route template for their workspaces. To edit tasks, you must create a new revision of the template.

This section describes how to view and edit all tasks in a route template at once. You can also view and edit information for a single task by clicking the task Name from the Tasks page of the route template. The Properties and editing pages for individual template tasks are different from the corresponding route task pages in the same ways described below.

To list and edit tasks in a route template

- From the global toolbar, click **My Desk>Routes>Route Templates**.
- From the Route Templates page, click the Name of the template you want to work with.
- From the category list for the template, click **Tasks**.

The Tasks page opens, listing all tasks saved with the template.

Order	Name	Assignee	Action	Instructions
		Software Engineer	Comment	
1		Design Engineer	Investigate	Please review this new design carefully.
2		Manufacturing Engineer	Approve	Need your approval.
2		Senior Manufacturing Engineer	Approve	Need your approval.

It contains the following columns:

Order—The order of the task within the route.

Name—The name of the task. If the template was created from a route that included automatically-named tasks, no task names are included.

Assignee—The person, group, or role the route creator assigned to the task. If the task assignees were not saved with the template, the Assignee column is empty. Also, if task assignees were saved with the template but the template owner removed the assignment for a task, the Assignee column for that task is empty.

Action—The action the task assignee should perform: Approve, Comment, Notify Only, or Investigate. If the action is Approve, the assignee must choose an approval status to complete the task: Approve, Reject, or Abstain. All actions except Notify Only require that the route member enter a comment to complete the task.

Instructions—Describes how to perform the task.

4. To edit the tasks, click **Edit All** from the page Actions menu.
A message is displayed: “You can edit a Route Template only by creating a new revision of it.” Click OK to create a new revision of the template. The new revision is inactive. You must activate it before anyone can use it to create routes.
5. Edit the tasks as you would the tasks for a route (see [Defining the Tasks in a Route](#)) with these exceptions:
 - There is no option for allowing the task assignee to set the due date so you must specify a date or the number of days after the route start or task creation.
 - If task assignees were not saved with the template, you cannot assign route members to tasks. People who use the template to create routes will have to add members and assign tasks before starting the route.
 - If task assignees were saved with the template, you can change the assignee to any other person in the access list. You can also unassign the task by choosing the empty row at the top of the tasks’s Assignee list.
6. Click **Done**.

Revising a Route Template

You can revise any route template that you created. Only the newest revision of a template can be used to create new routes. One way to revise a template is to edit the tasks in the template. See [Listing and Editing Tasks for a Route Template](#). Another way to make a new revision of a template is by editing a route that was created from the template and then clicking Save as Template from the route’s Properties page. See [Saving a Route as a Template](#).

Unless you are the template owner or Team Central Workspace Lead for a Workspace-level template, you cannot edit a route template. However, you can save a view-only template under a new name and then revise it. To do this, save a route created from the template as a template.

Editing Details for a Route Template

People with editing access for a route template can edit details of it, including reassigning the owner and changing the description, availability, and route task edit level. Generally, only the current template owner can make these changes, although Team Central Workspace Leads can change any Workspace-level route template for their workspaces.


To edit details for a route template

1. From the global toolbar, click **My Desk>Routes>Route Templates**.
2. From the Route Templates page, click the Name of the template you want to work with.
3. From the Properties page, click **Edit Details**.
4. From the Edit Route Template Details page, change information as needed.

Owner—The person who is responsible for maintaining the template. Who you can reassign ownership to depends on the template’s scope and availability.


If the route template’s Availability is:	Ownership can be reassigned to:
User	Anyone in the current owner’s company.
Enterprise	Any Company Representative in the current owner’s company.

If the scope of the route is a Team Central workspace, ownership can be reassigned only to another Workspace Lead in the specified workspace.

To change ownership, click  next to the Owner field and search for the new owner. For details, see [Finding and Selecting People](#).

Availability—Defines who can create routes from the template. User means the template owner is the only person who can use the template. Enterprise means the template is available to all company employees. Only Company Representatives can change a User template to an Enterprise template.

Scope—Defines who can be included in routes created from this template: All, Organization, or members of the specified Team Central workspace or Program Central project space only.

In Team Central, the template owner can change the scope only to another workspace for which the owner is a Workspace Lead. To change or specify a workspace, click  and choose a workspace.

Description—Change the template description as needed.

Route Task Edits—Use the Route Task Edits list to choose how people who create routes based on the template can edit the task list.

- **Maintain Exact Task List**—People who create a route from this template must use the exact task list, with no tasks added or removed. The route creator cannot make any changes to the task order or names, but all other fields can be changed.
- **Extend Task List**—People who create a route from this template must use the exact task list, but more tasks can be added to an existing route task level or a new level. The route creator cannot make any changes to the order or names of tasks from the route template, but can change all other fields. The route owner can make any changes to tasks the owner adds to the route.
- **Modify Task List**—People who create a route from this template can change all information for template tasks except the task name. The route creator can add new tasks but cannot delete template tasks.
- **Modify/Delete Task List**—People who create a route from this template can change and delete any task and can add new tasks.

5. Click **Done**.

Deleting a Route Template (Revision)

You can only delete User and Enterprise route templates that you own. Any Team Central Workspace Lead for the workspace can delete Workspace-level route templates. When you delete a template, you delete only the most recent revision of the template and the next-most recent revision becomes the active template. To delete a template entirely, you must delete all revisions of it.

To delete a route template

1. From the global toolbar, click **My Desk>Routes>Route Templates**.
2. From the Route Templates page, check the template(s) you want to delete.
3. Click **Delete Selected** from the page Actions menu.
4. At the confirmation message, click **OK**.
If there is more than one revision of the template, only the most recent revision is deleted and the next-most recent becomes the active template and is listed on the Route Templates page.
5. To delete the template entirely, repeat Steps 2 through 4 until there are no more revisions.

Discussions

Discussions Overview

A discussion is a top-level message about a particular item and the replies to that message. Each reply can in turn have replies so there can be many levels within the discussion. Discussions are also called message threads. Depending on the MatrixOne Application, discussions can be created for workspaces, folders, subfolders, routes, and projects. You access discussions for an item by clicking Discussions in the category list for the item.

Working with Discussions

The following topics are covered:

- [Listing Discussions for an Item](#)
- [Creating a New Discussion for an Item](#)
- [Listing Accesses for a Discussion](#)
- [Defining Access to a Discussion](#)
- [Listing and Adding Attachments for a Discussion](#)
- [Reading Messages in a Discussion](#)
- [Replying to Messages in a Discussion](#)
- [Deleting a Discussion or Message](#)







Listing Discussions for an Item

All members defined for an item can list discussions for it. For example, everyone with Read access to a folder, subfolder, route, or project can list discussions for it. However, if the creator of a discussion has removed you as a participant for the discussion, that discussion is not be included in the list of discussion you see for the item.

To list discussions for an item

1. Navigate to the category list for the item you want to work with.
For example, to list discussions for a workplace in Team Central, click **My Desk** > **Team** > **Workspaces** and then click a workspace name to select it.
2. From the category list for the item, click **Discussions**.
The Discussions page lists all top-level discussions that you have access to for the item.

WorkspaceFolder-5000: Discussions

Actions ▾  				
<input type="checkbox"/>	Name	Replies	Last Message	Owner
<input type="checkbox"/>	 Do you know about the...	11	2/5/2001	Smith, John
<input type="checkbox"/>	 Interesting Discussion	25	5/4/2001	Jones, Michael
<input type="checkbox"/>	 Message about File1234.doc	13	7/18/2001	Smith, Margot
<input type="checkbox"/>	 Are the changes ready?	5	1/12/2001	Johnson, Lisa

By default, the system includes all discussions for previous versions of a file in the Discussions list for the latest version of the file. This means that when you click the Discussions category in the category list for a previous version, the page will be empty unless someone has created a new discussion for that version after a new version was added. Alternatively, your system may have been configured so discussions remain with the version they were originally created for.

For each discussion, the page lists:

Name—The subject of the first message posted for the thread. To read the messages in a discussion thread, click its Name.

Replies—The number of replies posted to the first message, including all replies to replies.

Last Message—The date the last message was posted to the discussion thread.

Owner—The person who started the discussion by posting the first message.

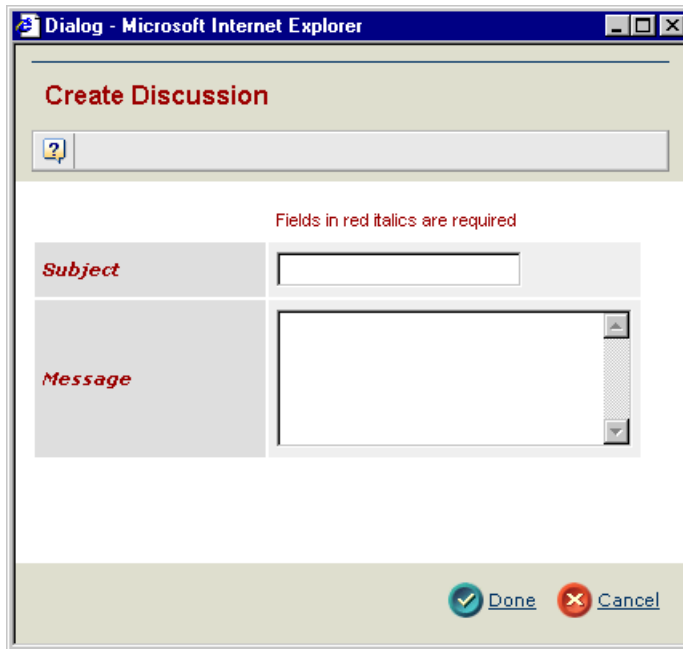
3. Use the **Actions** menu on the page toolbar to work with the discussions as needed:
 - To create a new discussion thread, select **Create New**. See [Creating a New Discussion for an Item](#).
 - To subscribe to be notified when a new top-level discussion is added for the item, select **Subscribe**. Refer to the User Guide for your application about subscribing to events.
 - To have other people receive notifications when a new discussion is added for the item, select **Push Subscriptions**. You can only push subscriptions for the item's discussions if you own the item. Push Subscriptions is not available for content from Sourcing Central, such as RFQs, packages, and quotations. Refer to the User Guide for your application about pushing subscriptions.
 - To delete a discussion thread, check it and select **Remove**. You can only delete discussions that you created and that have no replies. See [Deleting a Discussion or Message](#).

Creating a New Discussion for an Item

All members of an item (workspace, project, folder, etc.) can create new discussions for it. Everyone with Read access to the item can create discussions for it. After creating a discussion, you should define the list of people who can participate in the discussion. See [Defining Access to a Discussion](#).

To create a new discussion for an item

1. Navigate to the category list for the item you want to work with.
For example, to list discussions for a workplace in Team Central, click **My Desk > Team > Workspaces** and then click a workspace name to select it.
2. From the category list for the item, click **Discussion**.
3. From the Discussions page, click **Create New** from the page Actions menu.
The Create Discussion page appears.



4. In the **Subject** text box, type a word or short descriptive phrase that describes the content of the message.
5. In the **Message** text box, type your message.
6. When finished, click **Done**.

The discussion is added to the Discussions page. At this point, anyone with Read access to the item being discussed can read and reply to the discussion message. To limit the number of people who can participate in the discussion, see [Defining Access to a Discussion](#).

Listing Accesses for a Discussion

Having access to a discussion means you can fully participate in the discussion, including reading and replying to any message in it and subscribing to the discussion and individual messages. Anyone with access to a discussion can get a list of all members who have access to the discussion.




This procedure describes how to get the list of accesses only. To edit the list, see [Defining Access to a Discussion](#).

To list the people who can participate in a discussion

1. Navigate to the category list for the item you want to work with.
For example, to list discussions for a workplace in Team Central, click **My Desk > Team > Workspaces** and then click a workspace name to select it.
2. From the category list for the item, click **Discussions**.
3. From the Discussions page, click the **Name** of the discussion thread whose messages you want to read.
4. From the category list for the discussion, click **Access**.


The Access page for the discussion opens, listing all people who can participate in the discussion. If the discussion is for a folder content item and that item is in more than one workspace, the access list includes members who have access from all workspaces. If the item is also in Sourcing Central, the access list includes the roles that have access to the item from Sourcing Central, which is usually the Supplier and Buyer roles.


Talk : Access

Actions  					
<input type="checkbox"/>	Name ▲			Type	Organization
<input type="checkbox"/>	 Everything, Test			Person	Company Name

For each person, the page shows:

Name—The name of the person or role who can participate in the discussion.

The Workspace Lead  icon indicates the member is a Workspace Lead. Workspace Leads can add and remove people from the workspace and assign accesses for workspace components. They can edit workspace properties, add and remove folders and subfolders, and have access to all routes, even those they don't belong to. Workspace owners are automatically assigned Workspace Lead access.

The Create Route  icon means the member can create routes.

Type—For individual persons, this column distinguishes between people added to the workspace individually (Person) and people added by virtue of being assigned to the Buyer Desk associated with the workspace (Buyer Desk). If Role is listed in the column then the member includes all people in the workspace creator's company who are assigned that role, which means all these people can participate in the discussion.

Organization—The organization the person belongs to. This column is blank for roles.

Defining Access to a Discussion

When a person creates a discussion for an item, the system automatically takes all the people who have at least Read access to the item and gives them access to the discussion. Having access to a discussion means the person can fully participate in the discussion, including reading and replying to any message in it and subscribing to the discussion and individual messages. The discussion creator can remove persons and roles from the access list, preventing them from viewing or replying to any message in the discussion. But the discussion creator cannot add people to this list, which prevents a person who does not have Read access to an item from being able read discussions about it.

After the discussion is first created, the system does not update the access list for it as new people are given access to the item being discussed. However, if a person's Read access to the item being discussed is removed, the system removes the person from the discussion's access list.

Anyone with access to a discussion can get a list of all the workspace members and roles who have access to the discussion. Only the person who created the discussion can remove people from the access list and re-add these removed people by restoring the access list.

To define access for a discussion

1. Navigate to the category list for the item you want to work with.
For example, to list discussions for a workplace in Team Central, click **My Desk > Team > Workspaces** and then click a workspace name to select it.
2. From the category list for the item, click **Discussions**.
3. From the Discussions page, click the **Name** of the discussion thread whose messages you want to read.
4. From the category list for the discussion, click **Access**.

The Access page for the discussion opens, listing all people and roles who have access to the discussion. The system automatically lists all people who have at least Read access to the item being discussed. To filter the list so it shows only people added individually, choose Persons from the list in the upper right corner. To filter the list so it shows only persons added because they belong to an associated Buyer Desk, choose Buyer Desk Persons. To filter the list so it only shows roles, choose Roles.

Talk : Access

Name	Type	Organization
Everything, Test	Person	Company Name

5. To remove a member from the access list:
 - a) Check the member.
 - b) Click **Remove Selected** from the page Actions menu.
 - c) At the confirmation message, click **OK**.The member can no longer view or reply to messages in the discussion.
6. To re-add all members that you have removed from the access list, click **Reset Access** from the page Actions menu.
The system updates the list so it now contains all members who have Read access to the item being discussed.

Listing and Adding Attachments for a Discussion

During the course of a discussion, a participant may need to attach a document to support the posted message. Participants can access documents on a discussion as well as messages within a discussion. A file can be uploaded externally or added from a folder, depending on the application in use. Attachments can be added to any discussion or reply.






















Clicking the Attachment link in the discussion category list displays a summary of all attachments to the discussion. The owner and all persons that have at least read access to the parent object of the discussion have access to this summary and will see all attachments to the root message as well as all replies. If a document is in an Engineering Central folder, all who have access to the folder also have access to the document. For uploaded external files, all discussion participants have download, checkout, and checkin access to the file.

To list the attachments for a discussion

1. Navigate to the category list for the item you want to work with.
For example, to list discussions for a workplace in Team Central, click **My Desk > Team > Workspaces** and then click a workspace name to select it.
2. From the category list for the item, click **Discussions**.
3. From the Discussions page, click the **Name** of the discussion thread whose attachments you want to view.
4. From the category list for the discussion, click **Attachments**.


The Attachments page for the discussion opens, listing all files that have been added for the discussion.

Do you know about the...: Attachments

Actions ▾  						
<input type="checkbox"/>		Name	Ver	Description	Workspace	Actions
<input type="checkbox"/>		 abc.doc	1	This is the description of this item	Workspace-5000	 
<input type="checkbox"/>		 asdfa.doc	1	This is the description of this item	Workspace-5000	   
<input type="checkbox"/>		 xyz.doc	1	This is the description of this item	Workspace-5000	 
<input type="checkbox"/>		 brb.doc	1	This is the description of this item	Workspace-5000	  

For each attachment in the discussion, the page shows the:

Selection check box—The Attachments page contains the standard check boxes in the left column, which let you select items to work on. If you don't have accesses for removing an item, the check box is gray and unavailable for checking. You can still view information about the item but you can't remove it from the discussion.

Locked status—Shows whether the document is locked for edit, as indicated by a Lock  icon. To see who locked the file, move your mouse pointer over the Lock icon. When a file is locked for edit, no one else can lock the file for editing or check in a new version of the file until the person who is editing it unlocks the file manually or by checking in a new version. Even if a file is locked, you can still view it and save it to your computer.

Name—The name of the item. To view more information about an item, click its Name. The icon to the left of the name indicates the type of item. To see the type name, move your mouse pointer over the icon.

 for standard documents









 for 3D JT files

Ver—The version number for the document. A version of 1 represents the first time the file was added. Version number 2 means a person checked out the original file for revising and then checked in a new version. Version number 3 means a person checked in a second version and so on.

Description—Details of what the attachment is or what the attached file contains.

Workspace—The name of the workspace that contains the discussion. Click the workspace name to open a new window showing the workspace navigation pane and Properties page.

Actions—The Actions column contains icons that let you work with document content. If a particular icon is not displayed, then the item’s status does not allow the action (for example, the Unlock icon is only available for locked files) or you do not have access to perform the action.

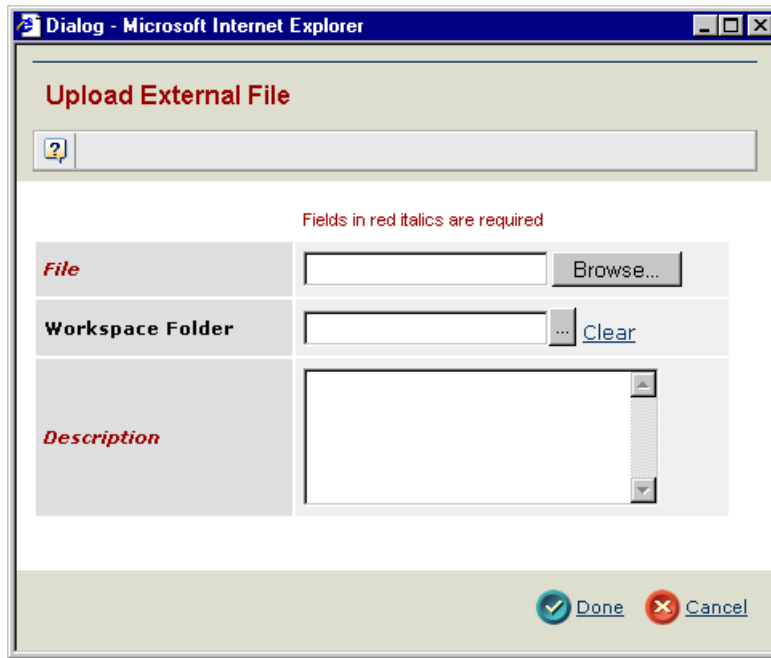
- **View**  —Use to view the file in the program associated with the file’s extension, including 2D and 3D viewer programs. To see which program will open if you click the icon for a particular document, move your mouse pointer over the icon. Note that this icon works just like the Checkout icon except it does not lock the file and Checkout can only be used for non-3D documents.
- **File Download**  —Use to save the file to a local disk. If you plan to make changes to the file and then check in a new version, use the Lock for Edit  icon instead of the Download icon. To view the document in an associated program immediately, without first saving the file to disk, use the View  icon.
- **Checkout (Lock for Edit)**  —Use to lock the document for editing. When a file is locked, no one else can check in a new version. When you lock a file for editing and the file’s extension has an associated program, the application opens the file in that program. If there is no program associated with the file’s extension or the file is of a type that can’t be opened in a browser, the application lets you save the file to a local disk. You can then open it in the associated program. Once opened in the associated program, you can edit it, resave it, and check it back in.
- **Checkin**  —Use to check in a new version of the document. This icon is only available if you checked out the document, which locked it for editing (your name should be displayed when you move your mouse pointer over the lock icon in the first column). Checking in a new version automatically unlocks the file, making it available for other people to edit it. Alternatively, you can unlock the file without checking in a new version by clicking the Unlock  icon.
- **Unlock**  —Use to unlock a file that you checked out and locked for editing. Manually unlock a file using this icon only if you decide not to check in a new version. Checking in a new version automatically unlocks the file.

To add documents that are in a local directory

1. From the Attachments page, click **Upload External File** from the page Actions menu.


Depending on how your system is set up, a File Checkin/Checkout Login page may appear. If so, enter the same **Username** and **Password** that you enter when logging into the MatrixOne Application and click **Login**.

The Upload External File page appears.



2. Enter information about the file:

File. Type the full path for the file, or click **Browse** to select the file. File names cannot include any of these special characters: ; \ / ? < > + = : & @ \$, * |.

Workspace Folder. Type the name of the folder for the file, or click  to select the workspace name.

Description. Type details that explain the contents of the file.

3. Click **Done**.

To add documents from the workspace

1. Click **Add Files(s) from Workspace** from the page Actions menu.
2. Enter search criteria. For help entering criteria, see [Using Search](#).
3. Click **Search**.
4. From the results page, check the item(s) you want to add.
5. Click **Select**.

When a file is added from a workspace folder, its security remains unchanged, which means all discussion participants may not have access to it.

To remove an attachment from the discussion or reply

The owner of the root message can remove an attachment as well as the reply owner. If the Discussion owner (creator of the root message) decides to delete the thread, all unmanaged documents also get deleted unless they have connections from another business object.

1. From the Attachments page, check one or more files that you want to remove.
2. Click **Remove Selected** from the page Actions menu.

If files have been uploaded externally, an alert is displayed to indicate that they will be removed from the system.

3. Click **OK** to remove files.

Reading Messages in a Discussion

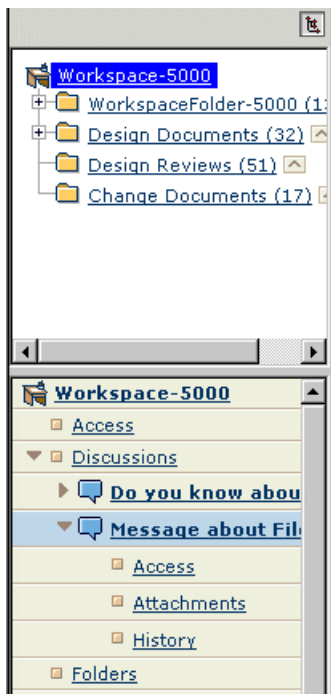
You can read all the messages in any discussion that you have been given access to.

To read messages in a discussion

1. Navigate to the category list for the item that contains the discussion.
For example, to list discussions for a workplace in Team Central, click **My Desk > Team > Workspaces** and then click a workspace name to select it.
2. From the category list for the item, click **Discussions**.
3. From the Discussions page, click the **Name** of the discussion thread whose messages you want to read.

A page opens that lists the messages in the discussion thread. The name of the person who posted the message and the date/time the message was posted is listed below the message content.

If a message has replies to it, there is an arrow to the left of the message subject. If the list of replies is shown, it is a down arrow, which you can click to contract the list. If the list of replies is contracted, it is a right arrow, which you can click to expand the list.



Do you know about the ...



4. To see replies to a message in the thread, click the right arrow to the left of the message.

The page expands and shows all replies to the message. The right arrow changes to a down arrow.

- Use the category list to view more information about the discussion:

Category	Description	For details, see:
Access	Lists the people who can participate in the discussion and lets the discussion owner add and remove people from the list.	Listing Accesses for a Discussion
Attachments	Lists the documents attached to the discussion and allows uploading external files or adding files from a workspace.	Listing and Adding Attachments for a Discussion
History	Lists a log of actions that have taken place for the discussion.	Click the help link on the History page

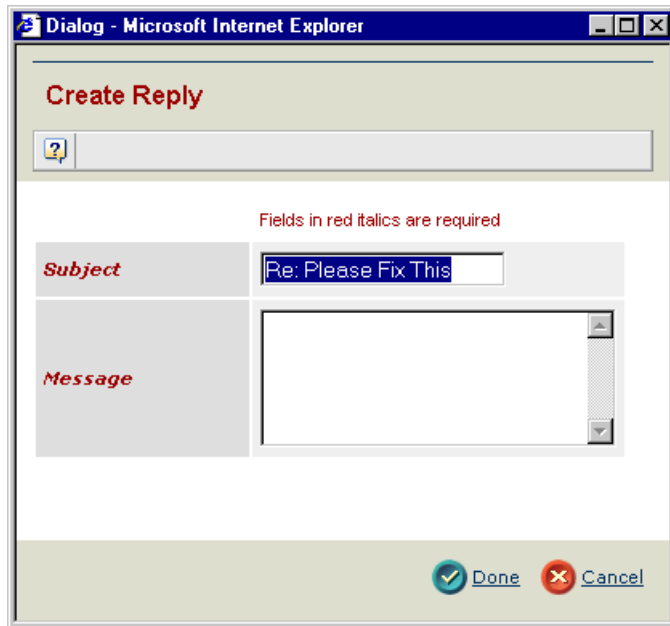
- Using the links under the content for each message, work with the messages as needed:
 - To reply to a message, click **Reply** under the message content. See [Replying to Messages in a Discussion](#).
 - To subscribe to be notified when a person replies to a message, click **Subscribe** under the message content. See [Subscribing to a Discussion](#).
 - To view attachments for a message, click **Attachments**.

Replying to Messages in a Discussion

You can reply to any message in any discussion that you have been given access to.

To reply to messages in a discussion

- Navigate to the category list for the item that contains the discussion.
For example, to list discussions for a workplace in Team Central, click **My Desk** > **Team** > **Workspaces** and then click a workspace name to select it.
- From the category list for the item, click **Discussions**.
- From the Discussions page, click the **Name** of the discussion thread whose messages you want to read.
A page opens that lists the messages in the thread. The name of the person who posted the message and the date the message was posted is listed below the message content.
If a message has replies to it, there is an arrow to the left of the message subject. If the list of replies is shown, it is a down arrow, which you can click to contract the list. If the list of replies is contracted, it is a right arrow, which you can click to expand the list.
- Find the message you want to reply to. Expand the list of replies as needed to find the message.
- For the message you want to reply to, click **Reply**.



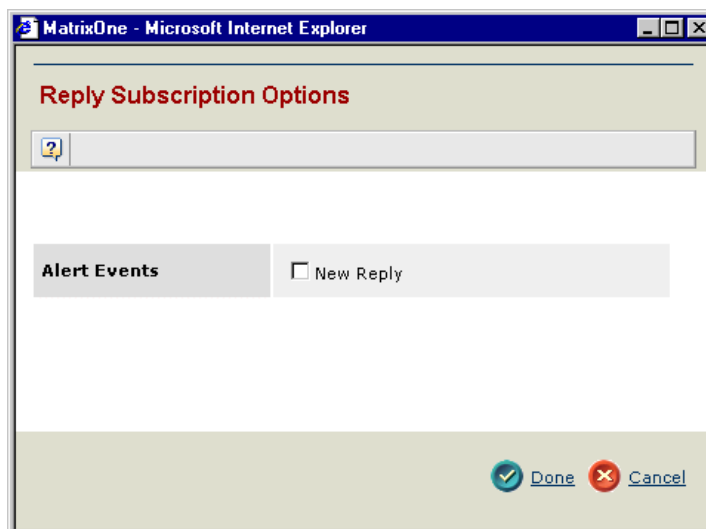
6. On the Create Reply page, edit the **Subject** if needed.
7. Enter the **Message** content.
8. Click **Done**.

Subscribing to a Discussion

You can subscribe to any replies made to a discussion.

To subscribe to a discussion

1. From the Discussions page, click the **Subscribe** link for the discussion.



2. To subscribe to replies for the discussion, check **New Reply**.
3. Click **Done**.

Deleting a Discussion or Message

You can delete any discussion or message within a discussion as long as you posted it and it has no replies.

To delete a discussion or message within a discussion

1. Navigate to the category list for the item that contains the discussion.
For example, to list discussions for a workplace in Team Central, click **My Desk > Team > Workspaces** and then click a workspace name to select it.
2. From the category list for the item, click **Discussions**.
3. To delete a top-level discussion that you created and that has no replies:
 - a) From the Discussions page, check the discussion you want to delete.
 - b) Click **Delete Selected** from the page Actions menu.
 - c) At the confirmation message, click **OK**.
4. To delete a message within a discussion that you created and that has no replies:
 - a) From the Discussions page, click the **Name** of the discussion.
 - b) Find the message you want to delete. Expand the list of replies as needed to find the message.
 - c) For the message you want to delete, click **Delete**.
 - d) At the confirmation message, click **OK**.

Member Lists

Overview of Member Lists

A member list is a collection of people that share one or more routes. Typically, member lists comprise people in the same department or people working in the same project team.

Any user can create a member list, which comprises:

- name of the member list
- whether the list is personal or enterprise in scope
- the owning organization

You assign member lists to a route when creating the route. Member lists can have either a Personal scope (available only to the user who created it) or an Enterprise scope (available to the organization assigned to it).

Member Lists are common only for Routes and specifications in Specification Central.

Viewing a List of Member Lists


Only users having a company representative role can view all member lists. All other users can view only their own member lists and Enterprise lists they belong to.

To view member lists

1. Click to view the listing of member lists.

For example, in Specification Central, click **My Desk > Specification > Member Lists**.

Member Lists

<input type="checkbox"/>	Name	Description	State	Scope	Owner	Organization
<input type="checkbox"/>	 ML-000101		Inactive	Personal	Test Everything	

The Member Lists page displays the member lists created by the user who logged in, and additionally displays the Enterprise scope member lists to which the user has access.

For each member list, the page shows:

Name—The name of the member list. If the owner chose autaname when creating the list, the name contains a prefix and a number. To see details about a list, click its Name.

Description—The description the owner entered for the list.

State—Inactive or Active. Inactive means the list can no longer be used. Active means the list is usable.

Scope—The scope is either Personal (available only to the user who created the list) or Enterprise (available to other users).

Owner—The person who created the list.

Organization—The company or business unit to which the member list applies.


2. Work with the member lists as needed:

- To view information about a member list, click its **Name**. See [Viewing Information for a Member List](#).
- To create a new member list, Click **Create New** from the page Actions menu. See [Creating Member Lists](#).
- To delete member lists from the database, click the check box for each list you want to delete and then click the Actions menu and select **Delete Selected**. To select all member lists, click the check box in the column heading.
A message is displayed, asking you to confirm that you want to delete the item(s) from the database. Click **Yes** to confirm the deletion or click **No** if you want the item(s) to remain in the database.
- To inactivate a member list, click the check box for each list you want to inactivate and then click the Actions menu and select **Inactivate Selected**. To select all member lists, click the check box in the column heading.
- To activate a member list that is inactivated, click the check box for the list you want to activate and then click the Actions menu and select **Activate Selected**.

Viewing Information for a Member List

The Member List Properties page shows details about the member list and provides access to the list's lifecycle and members.

To view information for a member list

1. Click to view the listing of member lists.
For example, in Specification Central, click **My Desk > Specification > Member Lists**.
2. From the list of member lists, click the highlighted link in the Name column of the list you want to view, or click  at the end of the row to view the Properties page in a new browser window.

The category list for the member list opens in the left frame and the Properties page opens in the right frame, showing details about the list. All fields are read-only.

Member List Host Co MemberList1 rev -: Properties

Actions ▾   	
Name	 Host Co MemberList1
Description	Member List1 sample data
Scope	Enterprise
Organization	Host Co BU1
Originated	Mar 8, 2004
Modified	Mar 8, 2004

The Member List Properties page contains details entered when the member list was created or modified. For details on specific fields, see [Creating Member Lists](#).

3. To edit the properties listed, click **Edit Details** from the page Actions menu. See [Editing Details About a Member List](#).
4. Use the category list to view additional information about the member list:

Category	Description	For details, see:
Lifecycle	Shows the lifecycle for the member list.	AEF User Guide
Members	Lists the members in the list.	Viewing Members in a Member List

Viewing Members in a Member List

You can view the members that make up a member list.

To view members in a member list

1. Click **Members** in the category list for a member list.

ML-000101: Members


<input type="checkbox"/>	Name	E-mail	Role	Location	State
<input type="checkbox"/>	 dmcall	qenotify@matrixone.com	Author,Limited Author,Reviewer,Release Manager,Document Management Administrator,Organization Manager		Active
<input type="checkbox"/>	 dmc reviewer	qenotify@matrixone.com	Reviewer		Active
<input type="checkbox"/>	 dmc author	qenotify@matrixone.com	Author		Active

2. To view detailed information about a member, click the member's **Name**.
3. To add a new member to the list, click **Add Members** from the page Actions menu. See *Finding and Selecting People*.

Editing Details About a Member List

A user can edit the details of their own member lists (having a Personal scope). Only users assigned as company representative can edit Enterprise scope lists.

To edit details about a member list

1. Click to view the listing of member lists.
For example, in Specification Central, click **My Desk > Specification > Member Lists**.
2. From the list of member lists, click the highlighted link in the Name column of the list you want to view, or click  at the end of the row to view the Properties page in a new browser window.
The category list for the member list opens in the left frame and the Properties page opens in the right frame, showing details about the list. All fields are read-only.
3. From the Properties page, click **Edit Details** from the page Actions menu.

Member List Host Co MemberList1 rev -: Properties

Fields in red italics are required

<i>Name</i>	Host Co MemberList1
Description	Member List1 sample data
Scope	<input type="radio"/> Personal <input checked="" type="radio"/> Enterprise
Organization	Host Co BU1
Originated	Mar 8, 2004
Modified	Mar 8, 2004

Done Cancel

4. Use the Edit Member List Details page to make changes. For details on specific fields, see [Creating Member Lists](#).
5. When you have modified all necessary fields, click **Done**.

Creating Member Lists

This section contains instructions for creating member lists and assigning people to a member list.

A user having the company representative role can create member lists having an Enterprise scope, meaning the member list is available to other users. Any user can create a member list having a Personal scope, meaning the member list is available only to the user who created the list.

Creating a member list involves two pages:

1. Create Member List
2. Add Members

To create a Member List

1. Click **Create New** from the page displaying member lists.

For example, in Specification Central, click **My Desk > Specification > Member Lists**. Then click **Create New** from the page Actions menu.

The Create Member List page opens.

MatrixOne - Microsoft Internet Explorer

Step 1 of 2: Create Member List

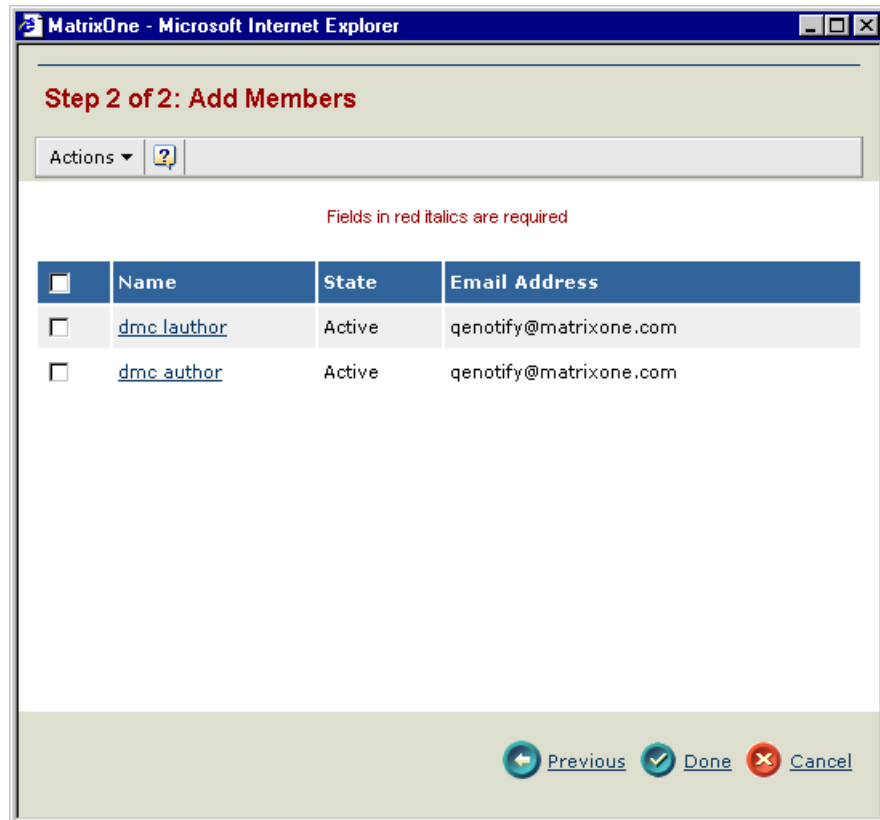
Fields in red italics are required

<i>Name</i>	<input type="text"/> <input checked="" type="checkbox"/> AutoName
Description	<input type="text"/>
Scope	<input checked="" type="radio"/> Personal <input type="radio"/> Enterprise
Owning Organization	<input type="text"/> Company Name ...

Next Cancel

2. Enter details about the member list, including the following:
 - Name.** Name of the member list. Required. Check **AutoName** if you want the system to generate the name.
 - Description.** Type a description of the member list.
 - Scope.** Select **Personal** if this is a list only available to the user. Users having the company representative role can create **Enterprise** scope lists, which are available to a particular organization.
 - Owning Organization.** Required for an Enterprise List. Select the company or business unit that can use this member list.
3. Click **Next**.
The Add Members page opens.

To add members to a member list



1. Click **Add Members** from the page Actions menu to select members for the list.
2. To remove a member from the list, check the box next to the member name and click **Remove Selected** from the page Actions menu.
3. When finished, click **Done**.

Subscriptions

Subscriptions Overview

Subscriptions are common in the following areas:

- document subscriptions
- route subscriptions

Working with Subscriptions

You can subscribe to document and route events and receive electronic notification when the events occur.

The following topics are covered:

- [Listing Document Subscriptions](#)
- [Subscribing to a Document](#)
- [Subscribing to Events for a Route](#)

Listing Document Subscriptions



You can list the documents that you currently subscribe to.









To list subscriptions

1. Open the Subscriptions page in your application.

For example, to list subscriptions in Document Central, click **My Desk > Document > Subscriptions**.

Subscriptions All ▾

Actions ▾  

<input type="checkbox"/>	Name ▾	Rev	Type	Description	Event	Edit	<input type="checkbox"/>
<input type="checkbox"/>	 Book-2114	A	Book	Descriptive text detailing the contents of this Book.	Book Locked, Content Added, Content Removed		<input type="checkbox"/>
<input type="checkbox"/>	 Bookshelf-5000	A	Bookshelf	Description	Bookshelf Deleted		<input type="checkbox"/>
<input type="checkbox"/>	 Document-5000	C	Document	Descriptive Text	Document Revised, Content Removed		<input type="checkbox"/>
<input type="checkbox"/>	 Library-3500	D	Library	Descriptive Text	Library Locked, Library Revised, Library Modified, Library Deleted, Content Added, Content Modified, Content Removed		<input type="checkbox"/>

For each subscription, the page lists:


Name—The name of the document.

Rev—The revision identifier for the document.

Type—The document type.

Description—A description of the document.

Event—A description of the event subscribed to for the document.


2. Optionally remove a subscription by checking it and selecting **Remove**.
3. To edit the subscriptions selected for a document, click  in the Edit column for the document. See [Subscribing to a Document](#).
4. To view details about an object in the list, click its Name.

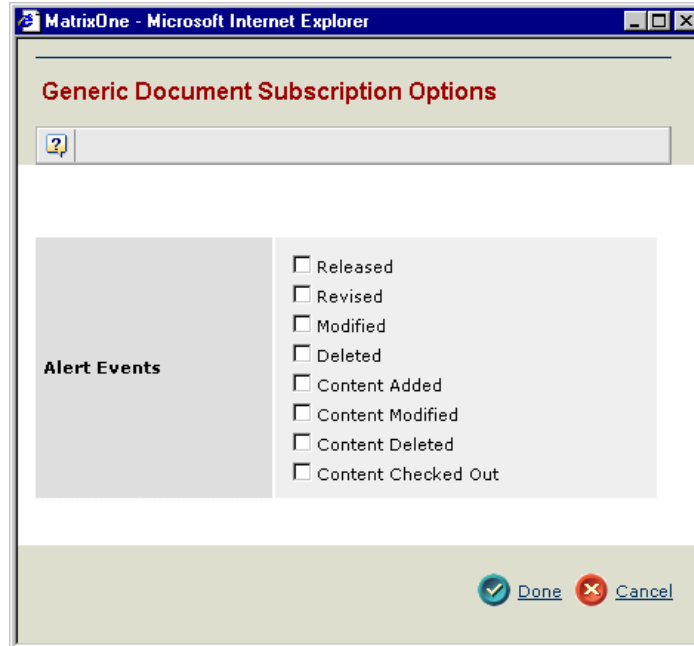
Subscribing to a Document

Subscribing to a document allows you to receive notification about selected events for the document.

To subscribe to a document

1. From the Properties page for a document click **Subscribe** from the page Actions menu.

Or from the subscription list page, click  in the Edit column for the document. The Document Subscription Options page appears.



2. Click the check box next to each document event you want to receive notification about.
3. When finished, click **Done**.

You will receive e-mail notification based on the events you selected.

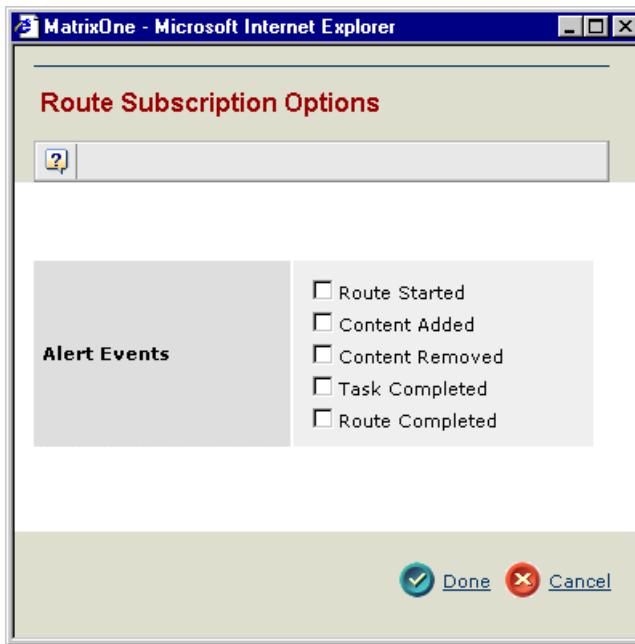
Subscribing to Events for a Route

You can choose to be notified when content is added or a task is completed for any route that you create or for which you have a task. Workspace Leads can subscribe to any route in the workspace. Be aware that the application automatically notifies the route owner when the route is complete and it notifies people when they have a pending task. These notifications occur without having to subscribe. You cannot subscribe to routes that have a Finished status.

To choose notification events for a route

1. Click **My Desk > Routes > My Routes**.
2. From the Routes page, click the **Name** of the route.
3. Click **Subscribe** from the page Actions menu.

The Route Subscription Options page opens with the alert events listed for the route.



4. To subscribe to an event, check the box to the left of it. To unsubscribe to an event, uncheck the box.

If you choose this alert event:	Then the system will notify you whenever:
Route Started	A route is started.
Content Added	A route member or the route owner adds content to the route. This does not include updated versions of files already in the route.
Content Removed	A route member or the route owner removes content from the route.
Task Completed	A route member completes a task.
Route Completed	The route has completed all its tasks.

5. Click **Done**.

If you are creating or editing a route that has not been started yet, the system returns you to the last step for creating/editing the route. You can start the route now or later.

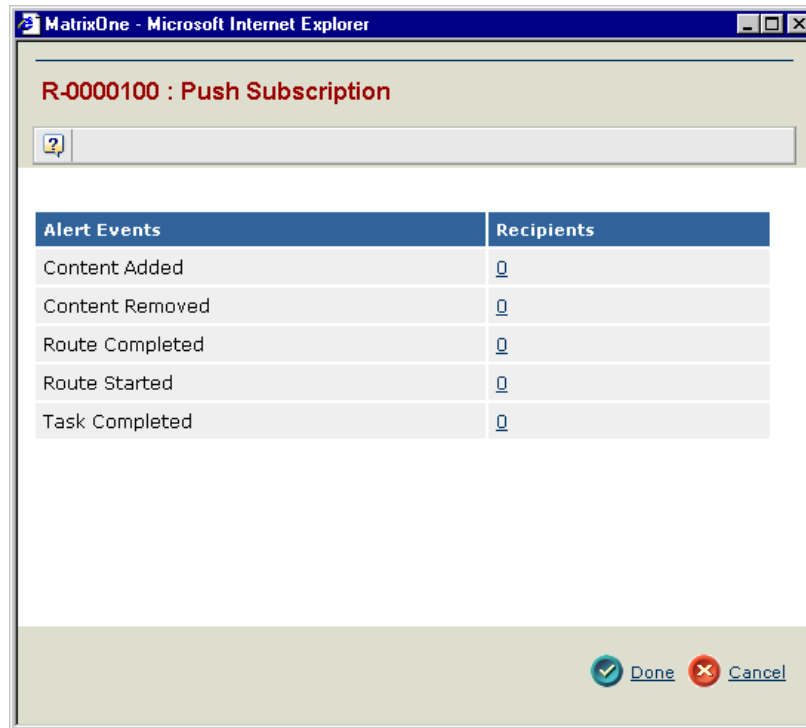
Pushing Subscriptions

The owner of an item can “push” subscriptions for the item to other users who have at least Read access to the item. Subscriptions cannot be pushed to a role.

To push subscriptions

1. Click **Push Subscriptions**.

The Push Subscription page opens, listing all events that you can subscribe to for the item. The Recipients column shows the number of people you have pushed subscriptions to for each event. The following graphic shows the Push Subscriptions page for a route.



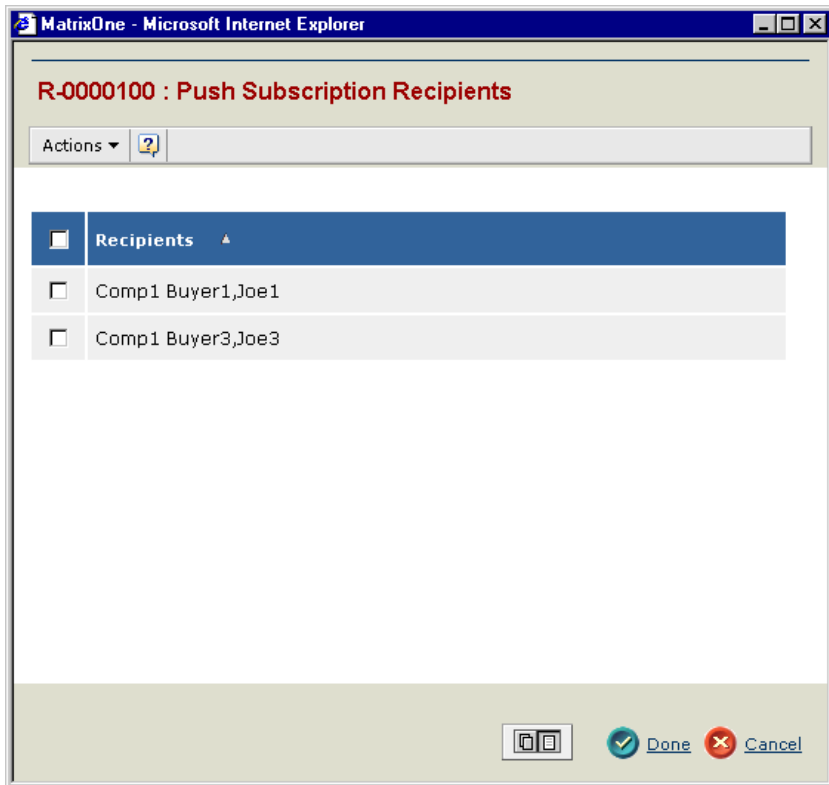
2. For each event that you want the system to notify other people for, click the linked number in the **Recipients** column. See [Selecting Recipients for a Subscription](#).
3. When finished selecting recipients, click **Done**.

Selecting Recipients for a Subscription

You select the recipients who will receive the subscription.

To select recipients

1. Click the Recipients link on the Push Subscription page.



2. To select the recipients, click **Add Recipients** from the page Actions menu. See [Finding and Selecting People](#).
3. To prevent the system from sending notifications to people:
 - a) Check the people.
 - b) Click **Remove Selected** from the page Actions menu.
4. When finished, click **Done**.

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