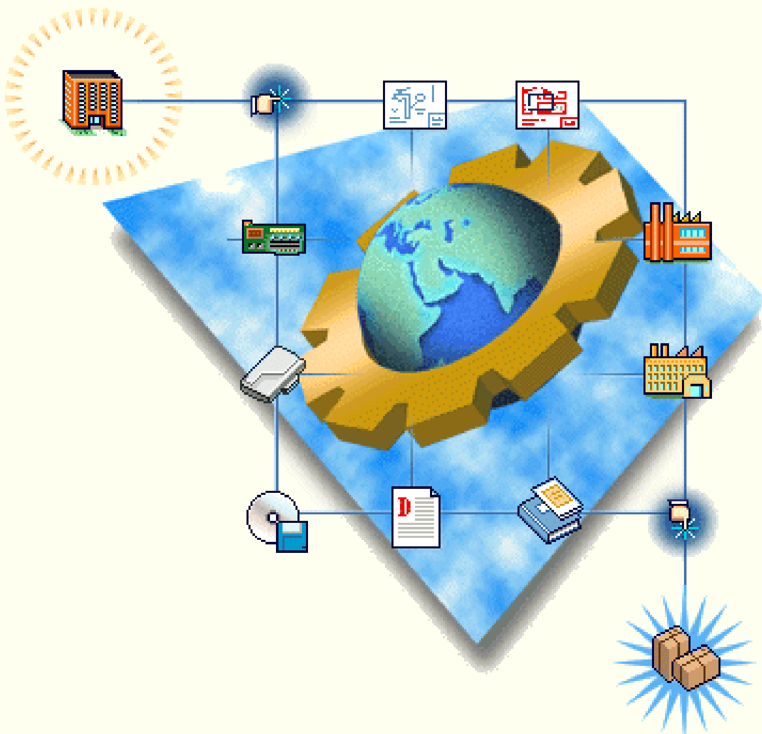
MatrixOne Team Central™

Version 10.5



User Guide

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

DM-MX-22-10-50

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1 Introduction to MatrixOne Team Central

Welcome to MatrixOne Team Central

MatrixOne Team Central helps you complete projects faster and with more efficiency by linking you with other people, both inside and outside your company, whose input is critical to getting the project completed. Use Team Central to:

- Create workspaces for sharing documents and discussions among workspace members and for routing information to specific members.
- Specify the people who can access the workspace by adding individuals from any company your company collaborates with, by adding a role to the workspace (all people in your company who are assigned to the role can access the workspace), and by associating the workspace to a Sourcing Central Buyer Desk (all buyers assigned to the Buyer Desk can access the workspace).
- Share documents and other information among workspace members using folders and subfolders.
- Participate in discussions about the project, folders, and individual content in the folders.
- Route information to workspace members and request that route members perform tasks—such as comment, approve, or investigate—by a scheduled date. Include instructions specific for each task in the route.

- Complete tasks assigned to you by reviewing and revising documents, indicating your approval or rejection, and commenting. Also delegate the task to another workspace member as needed and create sub-routes to help complete the task.
- Track the status of routes you have created and that you are a member of; see who has completed tasks and on what date, view documents people have added and edited, and review their approval status and comments.
- Track the status of tasks you are assigned and receive notifications when tasks are late.
- Schedule Web meetings and add workspace members as attendees.
- Contact workspace members easily with email links, Web site links, and phone and address records.
- Control who can access specific folders and subfolders, routes, discussions, and individual content items. Also specify the specific access level for each. For example, specify whether a member can just view the information or change, add, and delete the information. The workspace owner can set default accesses for all folders and content in the workspace.
- Request to be notified when specific events occur for specific workspaces or workspace components; for example, whenever a member is added to a workspace, whenever a file is edited, whenever a task is completed for a route, or whenever a new discussion is created for a file. Also request for other people to be notified when specific events occur.
- Read notifications from within the application using your IconMail InBox or within your email application.

Common Components and AEF Features

All MatrixOne applications install common components that are shared, providing consistency of features across all applications. Common features allow MatrixOne applications to manage information such as user and company profiles, documents, and routes, based on company roles rather than on the application used. These are described in the ***MatrixOne Common Components User Guide*** as well as in Common Components Help.

Other common features are provided by the Application Exchange Framework. These include IconMail, generic searching, collections, and preferences and are described in the ***AEF User Guide*** and AEF Help.

Common feature behaviors that are unique to Team Central are described in this user guide.

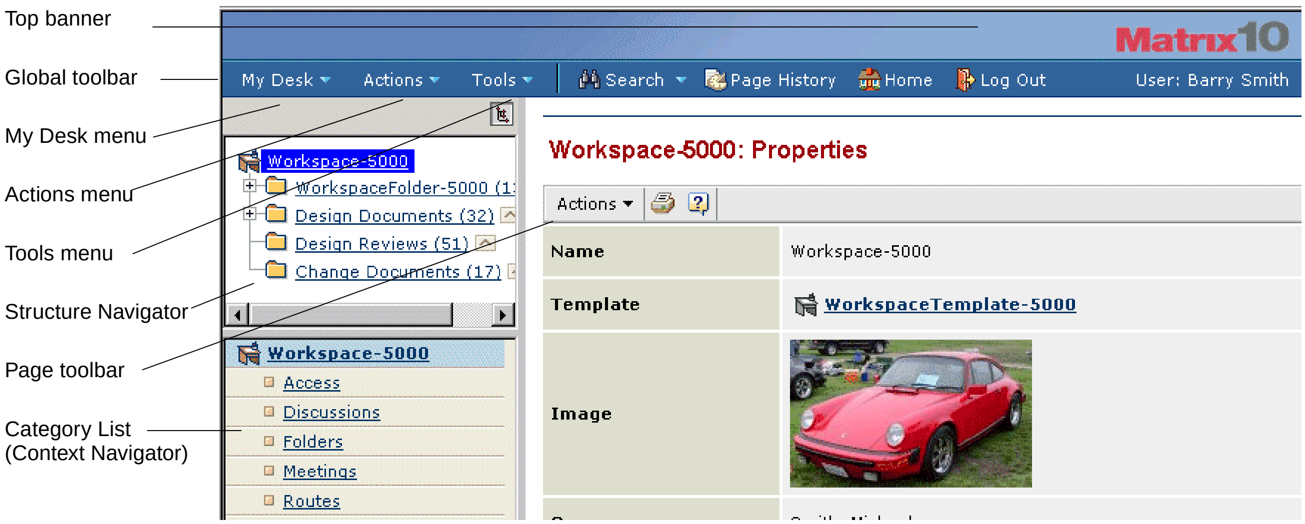
Using Team Central with Sourcing Central

Sites that use Sourcing Central (another Matrix One application) in conjunction with Team Central have additional options available, including:

- The ability to associate a Buyer Desk with a workspace. All buyers assigned to the Buyer Desk will have access to the workspace.
- The ability to add Sourcing Central items, such as RFQs, quotations, and packages, to folders. Once added to a folder, you can then route these items and view details about them.

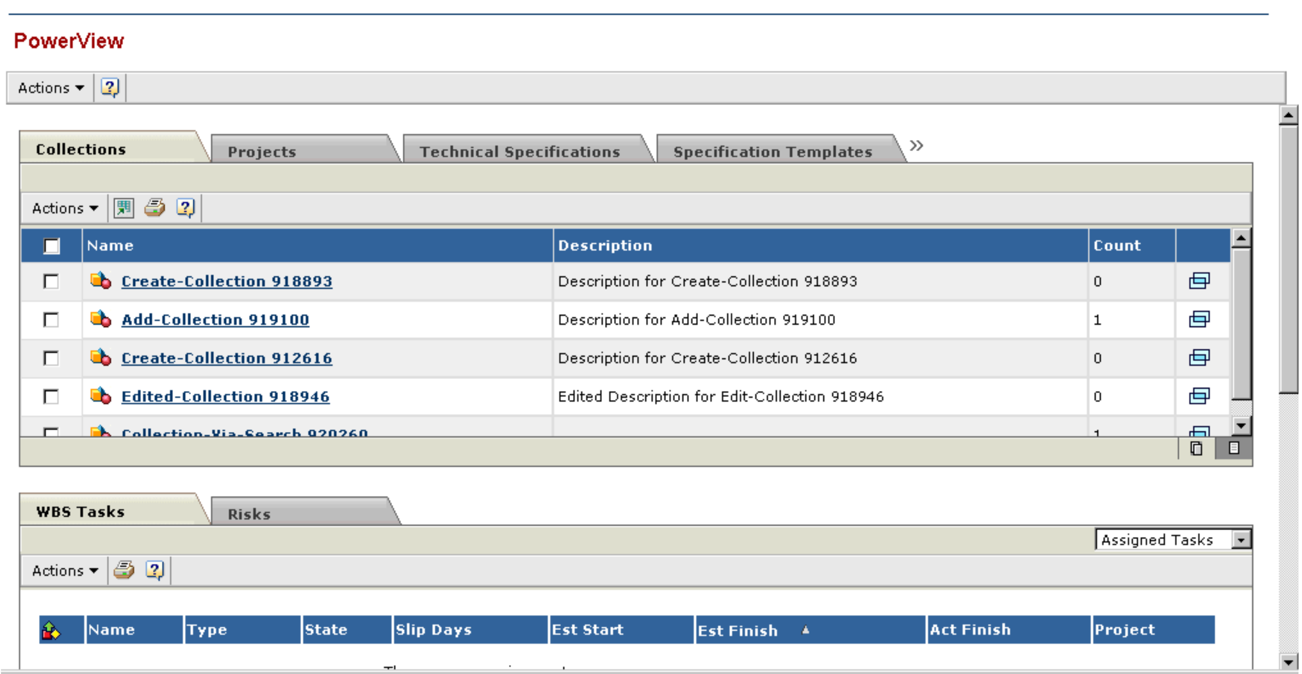
Application Window and PowerView

Shown below is a typical application window within Team Central.



For details about working with the controls and features in the application window, see “Overview of the MatrixOne Applications Window” in the ***AEF User Guide***.

If PowerView is configured for Team Central, clicking **Tools** > **PowerView** displays the desktop PowerView page, which provides direct access to items that are frequently used in MatrixOne applications. The PowerView is configurable by your Matrix Business Administrator, so you may see different information than what is shown below, especially if you use Team Central with other MatrixOne applications.



For details, see “Using Desktop PowerView” in the ***AEF User Guide***.

Important Terms

This section lists words you'll see frequently on Team Central pages and explains how these words are used within the system.

2D and 3D viewers
Applications that let you view documents and drawings 2- or 3-dimensionally. The viewers are usually compatible with many different file formats and often offer the ability to mark up the documents with annotations and highlights. Two common viewers are ViewCafe and Brava.

attribute
A property or characteristic that defines an item. For example, an attribute of a line item is Required Quantity, an attribute of a part is Weight, and an attribute of an RFQ is Quote Requested by Date.

access (access levels)
The ability to perform a particular action or view specific information. Team Central lets Workspace Leads assign accesses to individual folders, subfolders, content items, routes, and discussions. Workspace Leads can also assign default accesses for the workspace. See ***Overview of Team Central Accesses*** in Chapter 3.

archive
Make a completed workspace unavailable to members for the purposes of clearing obsolete or finished work from view. The workspace creator can archive a workspace. Once archived, only the workspace creator can access the workspace and its associated components, such as files and discussions.

business unit
An operating unit of a company. A business unit can have employees and locations of its own.

Buyer Desk
A term used within MatrixOne's Sourcing Central application that refers to a team of buyers responsible for sourcing particular line items or parts. Associating a Buyer Desk with a workspace adds all the buyers in the Buyer Desk to the workspace. Each Buyer Desk can only be associated with one workspace and a workspace can only be associated with one Buyer Desk.

check in
Checking in a file, also called uploading, means to copy the file from a local disk to a folder, subfolder, or route, making the file available to all workspace members who have access to the folder, subfolder, or route. To check in a new file, a person must have the appropriate access to the folder, subfolder, or route. To check in an updated version of a file, a person must first lock the file for edit. When a person checks in a new version, the system unlocks the file so others can edit and route it. Also see ***version (of a file)***.

check out
See ***lock for edit***.

company
Sometimes called parent company, refers to a top-level corporate entity. A company can have many business units, employees, and locations.

collaborate
When your company collaborates with another company, employees of each company can add employees of the other company as workspace members.

customer company
A company that registers with the host company so its employees can use Team Central.

discussion
Posted messages and replies to those messages that are related to a particular workspace, folder, or content item. The messages are "threaded" because workspace members can reply to a specific message. Other workspace members who have access to the discussion can then see the replies to the message. In turn, members can reply to a reply and then see those replies, and so on.

folder
A container for documents and other items, such as RFQs and quotations, that concern a particular subject within a workspace. Your site may have predefined top-level folders—

such as Testing/QA, Prototype, and Design Specifications—that are recommended for every workspace. Custom folders and subfolders can also be created for a workspace.

host company The company that makes Team Central available to other companies who register to use the application.

IconMail IconMail is a messaging system for Team Central and other MatrixOne applications. The messages include system notifications and messages sent between MatrixOne applications users. You access IconMail by clicking the IconMail tool in the toolbar. For more information, click the help button on the IconMail page.

location A physical site where a company or business unit does business. For example, a location may be a headquarters, manufacturing plant, shipping address, etc.

locked file A file that someone has checked out and is editing. Other people can view the file but they cannot lock the file for edit or check in a new version of the file until the person who locked the file checks in a new version.

lock for edit You can lock a file for editing when you intend to make changes and check in an updated version of the file. Since you don’t want anyone else to make changes while you are editing the file, the system “locks” the file. Other people can view the file but they can’t lock the file for editing, check in a new version, or route the file. When you lock a file for editing, you save the file to a local disk and then open it in the associated program (for example, Microsoft Excel for .xls file). After editing the file, you can resave it and check in the new version.

mark up To add annotations, drawings, highlights, or callouts to a document or drawing. Most 2D and 3D viewers let you mark up documents or drawings although the specific markup functions vary by viewer.

owner The owner of an item is initially the person who creates or adds the item. For example, the owner of a workspace is the person who creates the workspace. The owner of a workspace and folder can reassign ownership to someone else.

package A set of Request for Quotes (RFQs), which are managed from Sourcing Central. Buyers should create a package when they want to manage a set of RFQs collectively.

push subscription To request that another workspace member be notified when a specific event occurs for an item you own.

quotation A component of an RFQ. When the buyer sends an RFQ to suppliers, Sourcing Central creates one quotation for every supplier in the RFQ. The supplier uses the quotation to review the line items in the quotation, enter bids for each line item, and attach documents.

Request for Quote (RFQ) A buyer creates and submits an RFQ to inform suppliers of opportunities to design, test, or manufacture parts or supply services.

revision Non-document content items have revision numbers, which are just like version numbers. See ***version (of a file)***.

route A set of tasks that a person defines for a group of people. Routes typically contain documents and can contain RFQs, packages, or quotations, which the route members can use to complete their tasks. The route may require that people perform tasks sequentially or at the same time. The person who creates the route specifies the ***action*** people should perform when their tasks become active. For example, the action might be to comment or approve the items. The route creator also specifies the date by which each person should complete the task and gives instructions for completing the task.

route template A route template saves the components of a route that are frequently reused, including the route description, route members, task order, and task instruction and action for each member. The components of a route that are typically unique for each route—the route name, the content being routed, the task due dates and times, and the route accesses—are not saved in the template. Use route templates to speed up the process of creating a route that is similar to one you have already created.

subfolder

A container for files that are grouped within a folder. Having subfolders within a folder is optional and there can be subfolders within subfolders. Files and other items can be added to both folders and subfolders. You will probably want to create subfolders if you anticipate that a folder will have a lot of content and this content can be logically grouped into more than two sets.

sub-route

When a person is assigned a task as part of a route, the task assignee can create a sub-route to help complete the task. For example, if a task requires you to comment on a specification, you can create a sub-route to gather input and other documentation from other people. Any sub-routes that exist for a task must be completed before the task can be completed.

subscribe

To indicate that you want to be notified whenever a specific event is performed for an item within Team Central. For example, you could subscribe to a file and request that you be notified whenever someone locks the file for editing or checks in an updated version of the file. The items you can subscribe to are workspaces, routes, folders/subfolders, files, all the discussions for an item, and replies for individual messages within a discussion. You can also request that other people be notified when specific events occur for an item you own. This is called pushing a subscription.

task

A request that a workspace member perform some business activity—such as review, comment, or approve. When people create routes, they define the tasks that should be completed, who should complete them, and the action that should be completed. Routes typically include content, such as documents, and the tasks typically involve reviewing or commenting on the routed information. Included with each person's task are instructions for the person and the scheduled completion date.

template

See ***route template***.

unlock a file

To make the file available so other people who have the appropriate access to the file can lock the file for editing and then check in updated versions of the file. When you check in an updated version of a file, the system automatically unlocks it. You can also unlock a file without checking in a new version. For example, if you decide not to update the file or if you cancel the lock for edit process before saving the file to disk.

unmanaged documents

Documents that are attached to items, such as RFQs and quotations, but are not added to a Team Central folder.

version (of a file)

A file's version number increments by 1 each time a person checks in an updated version of the file. For example, the first time a person adds a file, its version is 1. When someone locks the file for editing and then checks in the updated version, Team Central lists version 2 of the file and so on.

view a file

When you view a file, the application opens the file in a new browser window. If the browser doesn't recognize the file's extension or the file is a type that can't be opened in a browser (such as a Winzip file), the browser gives you the option to save the file to a local disk. Then you can open the file in an appropriate program or use it as needed. Viewing a file has no affect on other people's ability to view or edit the file. For example, someone could edit the file while you are viewing it. If you intend to edit the file and check in a new version, you must lock the file for edit. Also see ***2D and 3D viewers***.

workspace

A collection of people, folders, content, routes, tasks, Web meetings, and access privileges assembled to accomplish a particular business need.

Workspace Lead

A workspace member who is able to add and remove people from the workspace, change access privileges for members (for example, give members the ability to create routes, add files to folders, etc.), add folders and subfolders to the workspace, and view any route in the workspace, even those they don’t belong to. Note that Workspace Leads are assigned per workspace, so a person who is a Workspace Lead for one workspace need not be a Workspace Lead for another workspace.

The workspace owner is automatically designated as a Workspace Lead. The workspace owner can then designate other workspace members to be Workspace Leads as needed.

workspace member

Any person added to a workspace is a workspace member, including people designated as a Workspace Lead and the workspace owner. When Workspace Leads add members to a workspace, they can include people from within their company or from within any collaborating organization. Workspace members also include roles assigned to the workspace and people assigned because they belong to an associated Buyer Desk.

How to Use This Guide

This ***Team Central User Guide*** is organized to help you use the Team Central application to perform tasks appropriate to your designated role. Here is a brief description of the contents in this guide:

- Chapter 1, ***Introduction to MatrixOne Team Central***. This section, which you are now reading, is intended to help new users learn about the scope and purpose of Team Central. Read this section to learn about what you can do in Team Central as well as what a typical application and PowerView page look like. This section also includes important terms and an explanation of documentation for using Team Central.
- Chapter 2, ***Performing Frequent Tasks***. This section describes frequently used tasks across Team Central, such as searching for items and people.
- Chapter 3, ***Workspaces***. This section describes how to create workspaces and workspace templates. It also explains how to assign people to workspaces, create discussions, and add folders and content.
- Chapter 4, ***Meetings***. This section describes how to schedule, join, and manage Web meetings. A Web meeting lets you conference with other people—live and over the Internet. Meeting attendees can share and mark up documents, give presentations, lead Web tours, demo applications, and share Desktops.

Conventions Used in This Guide

This guide uses the following conventions:

- Remove/Delete—In this guide and within the application, the term “delete” is used to refer to an action that deletes an item from the database, which means the item is no longer available for viewing or choosing. The term “remove” is used to refer to an action that disconnects one item from another. The disconnected item is still in the database and is still available for connecting to another item and viewing.
- Add/Create—Similar to the remove/delete distinction, adding means to connect or associate an existing item to another item. The item is not added to the database. Create means to add an item to the database.
- Sourcing Central-related options—Sites that also use Sourcing Central will see additional options on some pages, which are mainly related to associating Buyer Desks with workspaces, and adding RFQs, packages, and quotation to folders and routes. This guide describes these options and the graphics show them. If your site doesn’t use Sourcing Central, then the options won’t be displayed on your pages and you can disregard references to them within this guide. For more information about these options, see ***Using Team Central with Sourcing Central***.

Getting Help

You can get help on the Team Central page you are working with by clicking ? on the page. A separate help window will appear that displays the help topic for the page along with a navigable table of contents for the user guide. The help window also contains links for Common Components Help and AEF Help.

Related Documentation

In addition to this user guide, refer to the following documentation for information about Team Central administration and MatrixOne application features in general.

- ***Team Central Administrator Guide***, which contains information about Business Administrator functions. This manual is intended to help Business Administrators in the host company understand, set up, and configure Team Central.
- ***Common Components User Guide***, which describes features common to MatrixOne applications, such as company and user profile management, document management, discussions, issues, and route processing. This is accessible by clicking the Common Components Help link on any Help page.
- ***Common Components Administrator Guide***, which explains how Business Administrators can configure common components. It also describes the JSP pages for each component.
- ***AEF User Guide***, which describes common features such as IconMail, generic searching, collections, and preferences. This is accessible by clicking the AEF Help link on any Help page.
- ***AEF Administrator Guide***, which describes how Business Administrators can configure and customize MatrixOne applications. It describes the schema that underlies the applications and how to configure it.

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Performing Frequent Tasks

Finding an Item to Work On

There are two ways to find an item that you want to work with:

- Use the options when clicking **My Desk** > **Team** and drill down using tables and category lists.

  Clicking **My Desk** > **Team** shows options for listing the principal items of interest for working with workspace teams. For example, the My Desk tab contains options for listing workspaces, routes, tasks, and meetings. Clicking a My Desk option opens a table that lists all the items of that type that are relevant to you. You can use the filter list in the right corner of the table page to filter the list so it shows only items that meet a specific criteria.

- Search for an item.

  The Search option on the main toolbar lets you search for documents for which you have access. You can search for documents that have been added to folders and for documents that have been added to the database but not to folders. For example, people can attach documents to quotations using Sourcing Central. These documents that are not in workspace folders are called unmanaged files.

  Sites that use Sourcing Central can also search for RFQs, packages, and quotations.

  For general instructions on how to search for any type of item, see ***Searching for Items to Work With***.

Searching for Items to Work With

Searching for Items

This section contains general instructions for using the search option to search for any type of item. The types of items you can search for depends on the roles you are assigned and whether you are a Company Representative. For instructions on filling in search criteria for each type of item, see the specific instructions referenced below.

- The search for unmanaged files, those that are in the database but not in a folder, is the same as the search for folder documents, except there are no options for specifying a folder.
- For instructions on searching for companies, business units, and employees, see the ***Common Components User Guide***. Only Company Representatives can use these administrative search tools.

To search for an item

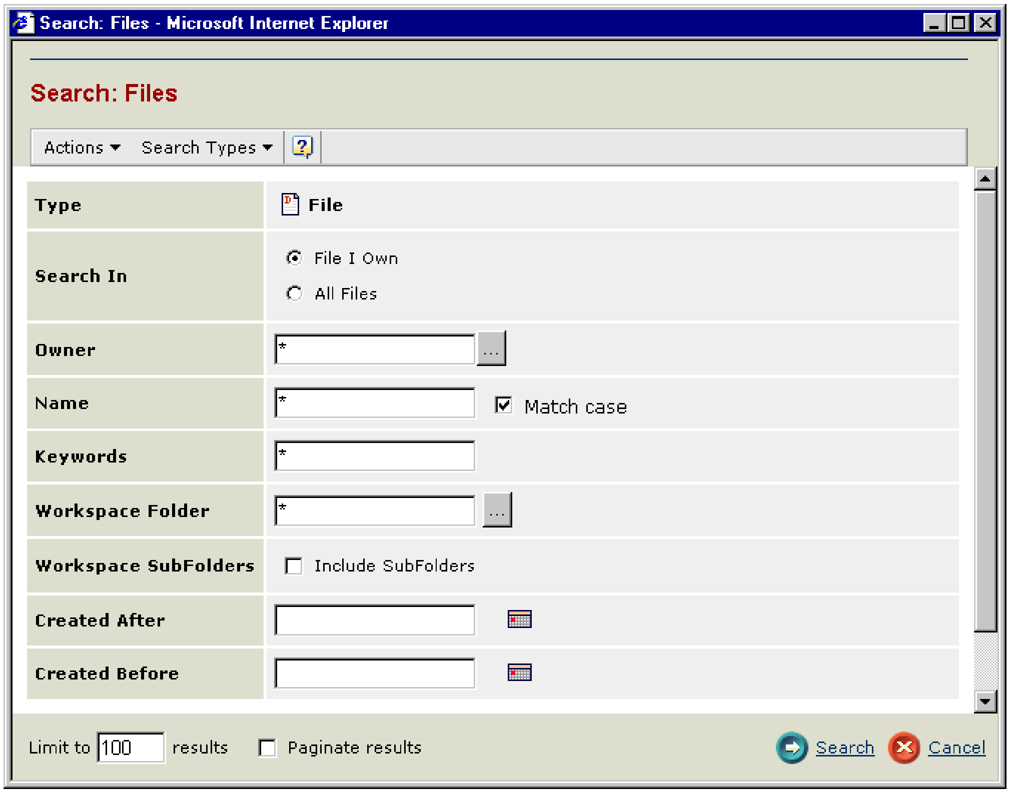
1. To search for a business-related item, such as a document or quotation, click **Search > Search Types > Team** from the main toolbar.

   The Search page opens.

2. From the drop-down list, click the type of search you want to perform.

- For example, to search for documents in folders, click **Files**. The search criteria for the type of search you selected appears. The types of items you can search for depends on the roles you are assigned to. Everyone can search for files, only buyers can search for packages and RFQs, and only suppliers can search for quotations. If Engineering Central is installed, the list also contains an option to search for parts. All users can search for parts that they own.

When searching for:	Use Advanced search to search using these attributes:
Files	Name, Description, Revision (this is the same as the version of the document), Owner, Current (state), Title, Originator, Checkin Reason Note that the application does not use following fields and therefore you should not enter criteria for them. If you do, the search will yield no results. These fields may be removed from your system: • Designated User • Version Date • Version • File Version • Language
Packages	Name, Description, Revision, Owner, Current (state), Originator, Co-Owners, Comments, Allow User Edits
Quotations	Name, Description, Revision, Owner, Current (state), Originator, Comments, Co-Owners, Allow User Edits
RFQs	Name, Description, Revision, Owner, Current (state), Originator, Comments, Co-Owners, Currency, Default Responsibility, Default Responses, Annual Part Quantity, Production Purpose, Purchase Decision, Quote Requested by Date, Quotation Response Review, Sourcing Product, Sourcing Spares, Allow User Edit, Last Legacy Update



3. Enter basic search criteria.

   For help entering criteria for a particular type of item, go to the topic for searching for that type of item. These topics are listed at the top of this topic.

   Here are some general guidelines for entering search criteria:

   - The system looks for items that meet all the basic criteria that you enter (an AND search).
   - When entering text to search on, use a wildcard character (*) to substitute for any characters you are unsure of or don't want to enter. Text fields are case sensitive, so make sure you type upper-case and lower-case letters exactly as entered in the database or use a wildcard for characters whose case you are unsure of. When searching for files, you can turn off the case sensitivity for the file name by unchecking Match case. If you don't want to search using a criteria that requires text input, leave the * in the box.
   - To search for all items created after a specific date, enter the date by clicking for **Created After** and choosing the date. The search includes items created on that date and after it. Note that for files, the creation date is when the file was added to the system, not when the file itself was actually created.
   - To search for all items created before a specific date, enter the date by clicking for **Created Before** and choosing the date. The search includes items created before that date but not on it.

4. To specify more search criteria, click **More**. See ***Using Advanced Search***.

5. When you have entered your search criteria, click **Search** to display the search results.

The Search Results page appears, listing summary information for all items that match your search criteria.

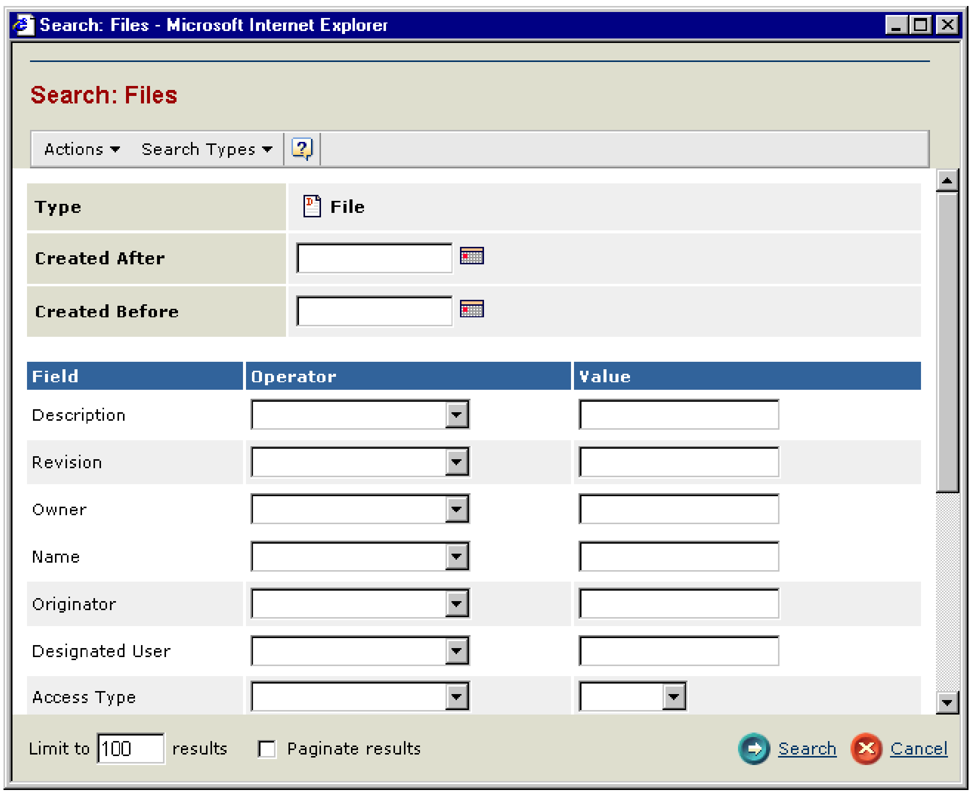
6. To access information about an item, click its **Name**.

Using Advanced Search

You can enter advanced search criteria when searching for items by clicking **Search** > **Search Types** > **Team** from the main toolbar. Then scroll to the bottom of the page and click **More**.

1. Click **More** on the Search page. (Do not enter basic criteria because the system does not use the basic criteria when performing an advanced search.)

   The page expands to show the advanced search criteria for the type of item you are searching for. Except for the Created Before and Created After fields, the basic criteria is removed. Any dates chosen in the Created Before and Created After fields are cleared. Most of the basic criteria is duplicated in the advanced criteria.



2. To search based on when the item was created, choose a date for the Created After and/or Created Before fields by clicking .

   To search for all items created after a specific date, enter the date by clicking for **Created After** and choosing the date. The search includes items created on that date and after it. Note that for files, the creation date is when the file was added to the system, not when the file itself was actually created.

   To search for all items created before a specific date, enter the date by clicking for **Created Before** and choosing the date. The search includes items created before that date but not on it.

3. For each attribute that you want to search on, choose an operator and enter the data you want to search on:

   a) Choose an operator from the **Operator** list.

   The operators for text attributes are:

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

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

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

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

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

   Matches—The system looks for attributes with data that matches text you enter, regardless of case.

   The operators for numeric attributes are AtLeast, AtMost, DoesNotEqual, Equals, IsBetween, LessThan, MoreThan.

   The operators for date/time attributes are On, OnOrAfter, OnOrBefore.

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

   If range values have been predefined for the attribute, a drop-down list is provided for you to select a value.

   If the operator requires more than one value, for example, “is between”, separate each option with a space.

4. Choose whether you want to perform an AND or an OR search. To search only for items that meet ***all*** the advanced criteria you entered, choose **AND**. To search for items that meet ***any*** of the advanced criteria, choose **OR**. (If you specified Created Before and/or Created After dates, the search is limited to those dates, regardless of whether you choose AND or OR.)

5. Click **Search**.

6. From the results list, choose the items you want to work with or click the Name of an item to see its details.

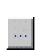
Searching for Files

Any Team Central user can search for files.

To search for files

1. From the main toolbar, click **Search** > **Search Types** > **Team** > **Files**.

2. Enter search criteria as needed to narrow the search:

   - Choose to search for **Files I Own** or **All Files**.
   - To search for files owned by a particular person, enter the **Owner** name. If you don’t want to search by owner, leave the * wildcard in the box. To search for an owner name, click  next to **Owner.**

- To search by the file **Name**, enter all or part of the name. Use the * wildcard to represent any number of characters. The search is case sensitive so make sure you use the correct case.
- To search by **Keywords**, enter one or more keywords. If you don't want to search by keywords, leave the * wildcard in the box.
- To search for files in a specific workspace folder, click the ... next to **Workspace Folder**. Enter search criteria and then choose the folders. For help executing the folder search, see ***Searching for Items***.
- To search for files in workspace folders, check **Include Subfolders** next to **Workspace SubFolder**.
- To search by **Created After**, click and select the date. See the ***AEF User Guide*** for using the calendar.
- To search by **Created Before**, click and select the date. See the ***AEF User Guide*** for using the calendar.

3. Use the **Limit to** box to limit the number of items that are listed in the results list. For example, if you limit the results to 50, the system will get only the first 50 items from the database that match your criteria.
4. To display more search options, click **More**. See ***Using Advanced Search***.
5. After entering search criteria, click **Search**.

   The Search Results page appears, listing the files that meet your criteria.
6. To see details about a file, click its **Name**.

Searching for Packages

Any Team Central user can search for packages.

To search for packages

1. From the main toolbar, click **Search** > **Search Types** > **Team** > **Packages**.
2. Enter search criteria as needed to narrow the search:
   - Choose to search for **Packages I Own** or **All Packages**.
   - To search for packages by name, enter one or more characters in **Package Name**. If you don't want to search by package name, leave the * wildcard in the box. The search is case sensitive so make sure you use the correct case.
   - To search by **Created After**, click and select the date. See the ***AEF User Guide*** for using the calendar.
   - To search by **Created Before**, click and select the date. See the ***AEF User Guide*** for using the calendar.
3. Use the **Limit to** box to limit the number of items that are listed in the results list. For example, if you limit the results to 50, the system will get only the first 50 items from the database that match your criteria.
4. To display more search options, click **More**. See ***Using Advanced Search***.
5. After entering search criteria, click **Search**.

   The Search Results page appears, listing the files that meet your criteria.

6. To see details about a package, click its **Name**.

Searching for Parts

Any Team Central user can search for parts.

To search for parts

1. From the main toolbar, click **Search** > **Search Types** > **Team** > **Parts**.
2. Enter search criteria as needed to narrow the search:
   - To change the **Type**, click the button and select another type.
   - To search by the program **Name**, enter all or part of the name. Use the * wildcard to represent any number of characters. The search is case sensitive so make sure you use the correct case.
   - To search by **Revision**, enter the revision identifier. If you don't want to search by revision, leave the * wildcard in the box.
   - To search by **Description**, enter part of the description and include the * before and after the portion you enter.
   - To search for the vault containing the part(s), click next to **Vault**. Enter search criteria and then choose the vault.
   - To search for parts owned by a particular person, enter the **Owner** name. If you don't want to search by owner, leave the * wildcard in the box.
   - To search for parts created by a particular person, enter the **Originator** name. If you don't want to search by originator, leave the * wildcard in the box.
3. Use the **Limit to** box to limit the number of items that are listed in the results list. For example, if you limit the results to 50, the system will get only the first 50 items from the database that match your criteria.
4. After entering search criteria, click **Search**.

   The Search Results page appears, listing the Parts that meet your criteria.
5. To see details about a part, click its **Name**.

Searching for Quotations

Any Team Central user can search for quotations.

This section gives instructions for entering the standard search criteria for quotations. For more help using the search tool and entering advanced criteria, see ***Using Advanced Search***.

To search for quotations

1. From the main toolbar, click **Search** > **Search Types** > **Team** > **Quotations**.
2. Enter search criteria as needed to narrow the search:
   - To search by the **Buyer Company**, select a buyer company from the drop-down list.
   - Choose to search for **Quotations I Own** or **All Quotations**.

- To search for quotations in a specific workspace folder, click the ... next to **Workspace Folder**. Enter search criteria and then choose the folder. For help executing the folder search, see ***Searching for Items***.
- To search for quotations by RFQ name, enter the **RFQ Name**. If you don't want to search by the RFQ name, leave the * wildcard in the box.
- To search by **Created After**, click and select the date. See the ***AEF User Guide*** for using the calendar.
- To search by **Created Before**, click and select the date. See the ***AEF User Guide*** for using the calendar.

3. Use the **Limit to** box to limit the number of items that are listed in the results list. For example, if you limit the results to 50, the system will get only the first 50 items from the database that match your criteria.
4. To display more search options, click **More**. See ***Using Advanced Search***.
5. After entering search criteria, click **Search**.

   The Search Results page appears, listing the quotations that meet your criteria.
6. To see details about a quotation, click its **Name**.

Searching for RFQs

Any Team Central user can search for RFQs.

This section gives instructions for entering the standard search criteria for RFQs. For more help using the search tool and entering advanced criteria, see ***Using Advanced Search***.

To search for RFQs

1. From the main toolbar, click **Search** > **Search Types** > **Team** > **RFQs**.
2. Enter search criteria as needed to narrow the search:
   - Choose to search for **RFQs I Own** or **All RFQs**.
   - To search for RFQs by name, enter one or more characters in **RFQ Name**. If you don't want to search by RFQ name, leave the * wildcard in the box. The search is case sensitive so make sure you use the correct case.
   - To search by **Created After**, click and select the date. See the ***AEF User Guide*** for using the calendar.
   - To search by **Created Before**, click and select the date. See the ***AEF User Guide*** for using the calendar.
3. Use the **Limit to** box to limit the number of items that are listed in the results list. For example, if you limit the results to 50, the system will get only the first 50 items from the database that match your criteria.
4. To display more search options, click **More**. See ***Using Advanced Search***.
5. After entering search criteria, click **Search**.

   The Search Results page appears, listing the quotations that meet your criteria.
6. To see details about an RFQ, click its **Name**.

Searching for Unmanaged Files

Any Team Central user can search for unmanaged files.

To search for unmanaged files

1. From the main toolbar, click **Search** > **Search Types** > **Team** > **Unmanaged Files**.
2. Enter search criteria as needed to narrow the search:
   - Choose to search for **Files I Own** or **All Files**.
   - To search for files owned by a particular person, enter the **Owner** name. If you don’t want to search by owner, leave the * wildcard in the box. To search for an owner name, click  next to **Owner.**
   - To search by the file **Name**, enter all or part of the name. Use the * wildcard to represent any number of characters. The search is case sensitive so make sure you use the correct case.
   - To search by **Keywords**, enter one or more keywords. If you don’t want to search by keywords, leave the * wildcard in the box.
   - To search by **Created After**, click  and select the date. See the ***AEF User Guide*** for using the calendar.
   - To search by **Created Before**, click  and select the date. See the ***AEF User Guide*** for using the calendar.
3. Use the **Limit to** box to limit the number of items that are listed in the results list. For example, if you limit the results to 50, the system will get only the first 50 items from the database that match your criteria.
4. After entering search criteria, click **Search**.

   The Search Results page appears, listing the files that meet your criteria.
5. To see details about a file, click its **Name**.

Choosing Items by Searching and Selecting

As you work in Team Central, you'll frequently need to choose an item or items that are in the database. For example, when you add an external file to a route, you select a folder to add the file to. When you add members to a workspace, you choose people and/or roles to add.

The system offers two ways to let you choose these kinds of items. If there may be many items from which you need to choose, the system lets you narrow the list of items by searching. For example, if you need to choose a person to add to a workspace, the system presents a search page so you can enter search criteria. If there are typically fairly few items, the system presents a select page so you can choose the items. For example, when specifying a folder to add a file to, you choose from a select page.

This section describes how to use these selection and search pages:

- ***Choosing by Searching***
- ***Choosing by Selecting***

Choosing by Searching

This describes how to use search pages that let you choose an item or items as part of performing a particular task. For example, when adding members to a workspace, you need to search for the people to add. The search pages are very similar to the main search pages you use to find an item to work with, as described in ***Searching for Items to Work With***.

This procedure assumes that you have already initiated the command that opens the search page.

To choose an item or items by searching

1. From the Find or Search page, enter search criteria.

   This graphic shows an example of the Find People page.

   Here are some general guidelines for entering search criteria. Use the table below these guidelines for more specific instructions for each type of search.

   - The system looks for items that meet all the basic criteria that you enter (it's an AND search).

- When entering text to search on, use a wildcard character (*) to substitute for any characters you are unsure of or don't want to enter. These fields are case sensitive; make sure you type upper-case and lower-case letters exactly as specified in the part information. If you don't want to search using a criteria that requires text input, leave the * in the box.

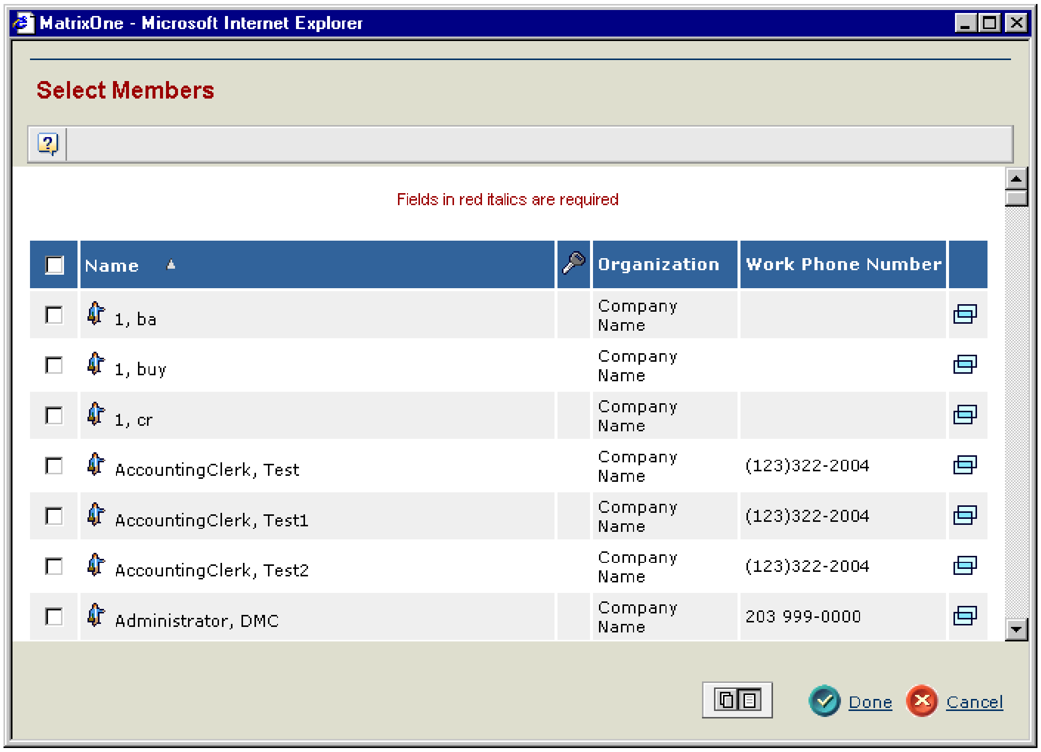
Search Type	Description of Possible Criteria
Person	Username—To search based on the username the person uses to log in, type the username. Use the * wildcard to represent any number of characters. The search is case sensitive so make sure you use the correct case. If you don't want to search by username name, leave the * wildcard in the box. Last Name, First Name—To search based on the person's last or first name, type the name. Use the * wildcard to represent any number of characters. The search is case sensitive so make sure you use the correct case. If you don't want to search by username name, leave the * wildcard in the box. Organization—To search based on the person's company, choose the company. When searching for people to add to a workspace, this list is limited to the companies your company collaborates with. Role—To search based on the person's role, choose the role.
Role	Name—To search based on the role's name, type the name. Use the * wildcard to represent any number of characters. The search is case sensitive so make sure you use the correct case. If you don't want to search by username name, leave the * wildcard in the box. Level—Check Top level to search only for top level roles, Sublevels to include sub-roles.
Unmanaged file	The search for unmanaged files, those that are in the database but not in a folder, is the same as the search for folder documents, except there are no options for specifying a folder.
Sourcing Central items, such as RFQs, packages, and quotations	For instructions on entering criteria for Sourcing Central items, see the ***Sourcing Central Guide***.
Route template	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 to search only for templates created by your Company Representative and available to all route members. Choose User to search only for templates that you created within the workspace. If you don't want to limit the search by scope, choose *.

2. If there is a More link at the bottom of the criteria page, you can enter advanced criteria. For instructions, see ***Using Advanced Search***.

3. When you have entered your search criteria, click **Search** to display the search results.

The Select page appears, listing summary information for all items that match your search criteria.

If the task you are completing lets you choose more than one item, the page shows a check box next to each item, allowing you to choose as many items as you want. If you can only choose one item, there is a circular button next to each item.



4. Choose the item or items you want to work with.
5. Click **Done**.

Choosing by Selecting

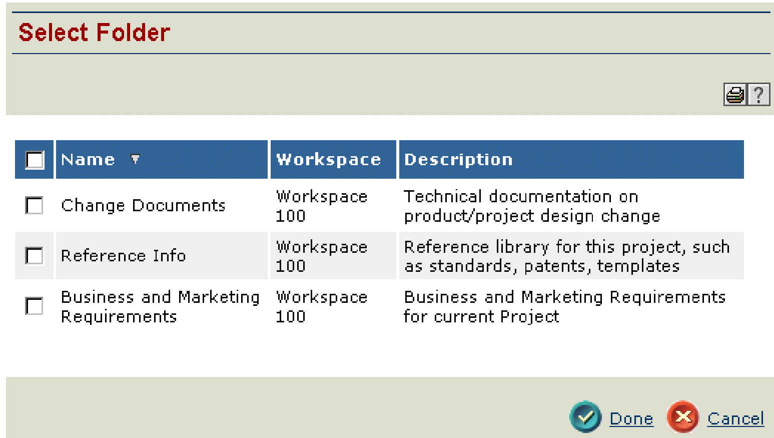
This section describes how to use Select pages that let you choose an item or items as part of performing a particular task. For example, when choosing a Buyer Desk for a workspace, the Workspace Lead can choose from a list of Buyer Desks created for their company. This section also describes how to use the Type chooser.

To choose an item or items by selecting

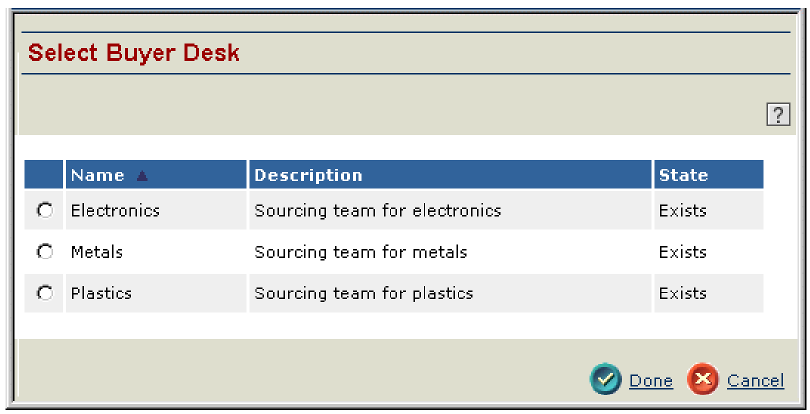
1. From the page that lets you specify the item, click the Browse ... button for the item.

   The Select page opens for the item, listing the items that you can choose. The system may limit the list based on items you have access to. For example, the list of workspace folders only includes folders you have access to. If an item can’t be selected, for example, because it is already selected or its state does not allow it to be selected, the check box/button for it is gray and unavailable.

   If you can select more than one item, the page shows a check box next to each item, letting you select as many as you want. The following graphic of the Select Folder page contains check boxes.



If you can select only one item, the page shows a circular button next to each item. The following graphic of the Select Buyer Desk page contains buttons.



2. Choose the item or items you want to select.

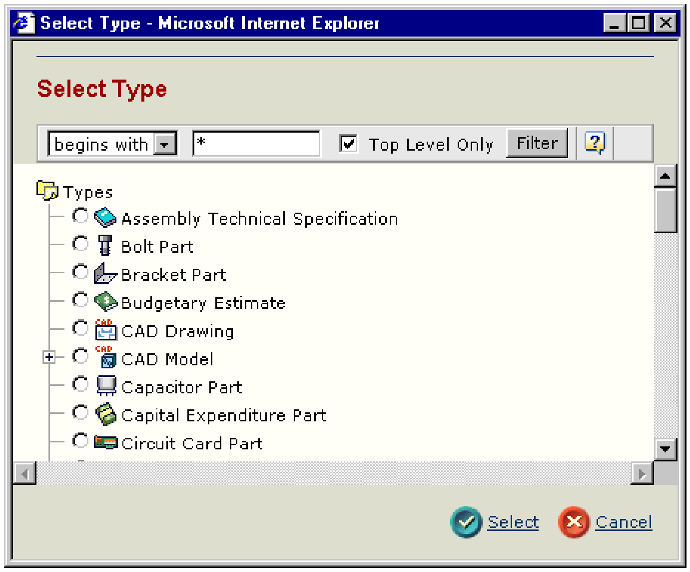
   If the items are organized in a hierarchy, and most items are, the lower-level items are indented and listed under the higher-level items. If a higher-level item has lower-level items, there is a plus sign next to the item. To expand a higher-level item, click the plus sign next to it. To contract a list, click the minus sign.

3. Click **Done**.

To select a type

1. Click the ... button for the Type.

   The Select Type page opens for the item, listing the types that you can choose.



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

2. You can use the filter bar to customize the types shown.

   a) Select an operator:

   Begins with—The system looks for type names that begin with the text you enter (like including a wildcard * at the end of the text you enter).

   Ends with—The system looks for type names that end with the text you enter (like including a wildcard * at the beginning of the text you enter).

   Contains—The system looks for type names that include the text you enter (like including a wildcard * before and after the text you enter).

   Equals—The system looks for type names that exactly match the text you enter.

   b) Type the text to search on. This field is case-sensitive.

   c) Check **Top Level Only** if you want to see only parent types, or uncheck it to see all type and subtypes that match your filter criteria.

   d) Click **Filter**.

   For example, to search for all parts, select “Contains” from the drop-down list and type “Part” in the text field. The list will change to show all types that contain the word “Part”, for example: Part, Electrical Part, Mechanical Part, Component Part, (etc.).

3. A plus sign to the left of a type indicates that there are subtypes of that type. Click the plus sign to expand the type hierarchy. Click the minus sign to collapse the hierarchy.

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

5. Click **Select**.

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

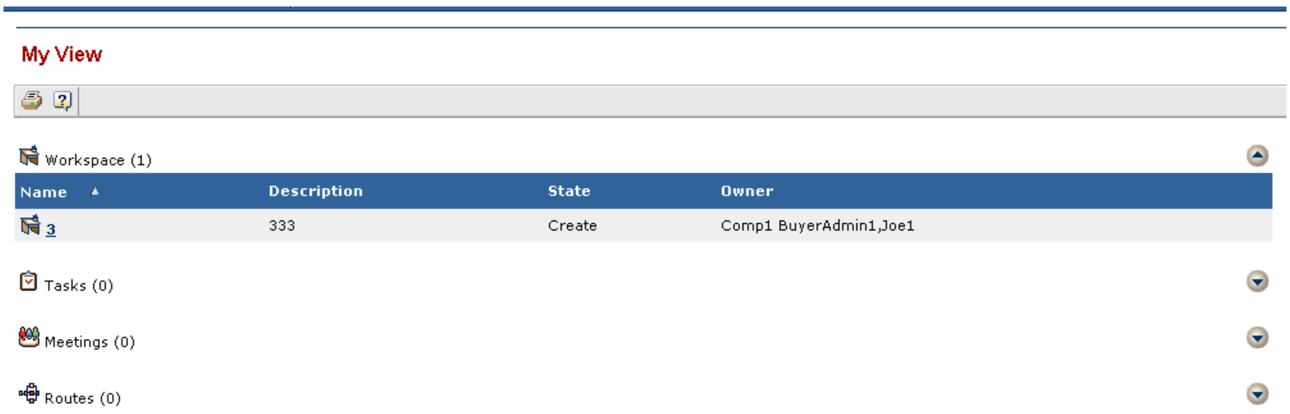
Using My View

You can view frequently used objects in Team Central by using the My View option.

To use My View

1. Click **My Desk** > **Team** > **My View**

   The My View page appears.



2. To expand an object category, click  at the end of the category line.
3. To view information about an object, click its **Name**.

   The Properties page for the object appears.

3

Workspaces

Workspaces

This section contains these topics:

- *Workspace Overview*
- *Workspace Example*
- *Overview of Team Central Accesses*
- *Workspace Accesses*
- *Listing Your Workspaces*
- *Viewing Information about a Workspace*
- *Creating a New Workspace*
- *Editing Workspace Details*
- *Activating a Workspace*
- *Archiving a Workspace*
- *Reactivating an Archived Workspace*
- *Deleting a Workspace*

Workspace Overview

A ***workspace*** is a collection of folders that contain documents and other information assembled to accomplish a particular business need, and people from different companies who can access the folder content. The workspace members can collaborate and share information by participating in Web meetings and discussions, and assigning tasks to each other. A workspace includes:

- Folders and subfolders

  A ***folder*** is a container for documents and other items, such as Requests to Suppliers and quotations, that concern a particular subject. Your system may have predefined, recommended folders—such as Testing/QA, Prototype, and Design Specifications—that can be added to every workspace. You can also define custom folders for a workspace and define custom subfolders within folders. If they have the appropriate access, workspace members can view folder content, add and remove content, revise documents, participate in discussions about the content, route the content, and subscribe to be notified when specific events occur for a folder or its content.

- Members

  You can add people from within your organization or from within any organization your company collaborates with. You can also add an entire role to a workspace, which gives access to any person from your company who is assigned to that role. If you associate the workspace with a Buyer Desk, all the people assigned to the Buyer Desk are added as members. You can designate certain members to be Workspace Leads. A ***Workspace Lead*** can add and remove people from the workspace and can assign workspace and default access privileges. Workspace Leads can also add and remove folders.

- Routes

  A ***route*** is a set of tasks that members of a workspace complete to accomplish a business activity. Routes can contain any item added to the workspace's folders, including documents and non-document items such as RFQs and quotations. Or a route can have no content. For example, a workspace member might create a route to get a design specification reviewed and approved. The person can include the design specification and other related documentation in the route. Some workspace members would have tasks for reviewing and commenting on the spec, others would have tasks for approving the spec.

  To speed-up the process of creating a route, you can save routes that you use frequently as templates. A ***route template*** contains the commonly reused components of a route, such as the description, route members, instructions, and task actions.

  For information about using routes, see the ***Common Components User Guide***.

- Web meetings

  Workspace members can schedule, join, and manage Web meetings. A Web meeting lets you conference with other people—live and over the Internet. Meeting attendees can share and mark up documents, give presentations, lead Web tours, demo applications, and share Desktops.

- Subscriptions

  Subscribing means to indicate that you want to be notified whenever a specific event is performed for a workspace or workspace component. For example, you could request that you be notified whenever someone locks a file for editing or checks in a new version of the file. You can also have other people be notified when specific events occur for components that you own. This is called ***pushing a subscription***.

Workspace Example

This section describes how a typical workspace team might use Team Central to collaborate on a design specification for a part.

Create the Workspace

When creating a workspace, the creator adds folders, subfolders, and members, and defines workspace-level accesses.

Suppose a Design Engineer creates a workspace for the design of a part. The Design Engineer associates the Buyer Desk that is responsible for sourcing the part to the workspace. The Design Engineer adds the predefined folders called Design Specifications and Prototype, and creates a new custom folder called Competitor Analysis. Within the Design Specifications folder, the Design Engineer adds the Preliminary and Final Spec subfolders.

The Design Engineer also adds members to the workspace and assigns workspace privileges for each, including default accesses for all folders and content in the workspace. In order for Workspace Lead to add a person from another company to a workspace, there must be a collaboration partnership established between the two companies. For information on establishing collaboration partnerships, see the ***MatrixOne Common Components User Guide***. These are the members who are added:

- A supplier from a company in Japan, can create routes, default access is Basic
- Design Engineer role, default access is Read
- Two Design Engineers from within his own company, default access is Add
- A project manager from within the company, designated as Workspace Lead, can create routes, default access is Add
- A manufacturing engineer from a company in China, can create routes, default access is Basic
- A manufacturing engineer from a company in Korea, can create routes, default access is Basic
- The buyers assigned to the associated Buyer Desk are also added to the workspace and the workspace creator gives them each Read access as the default access

Assign Additional Access to Folders, Add Content, and Subscribe

After creating the workspace, the Design Engineer adds content to folders and assigns additional accesses per folder and content item. He gives the Design Engineer role Add access to the Design Specification folder, and gives the members from collaborating companies Read access to Prototype and Read + Write access to Design Specifications. The collaborating partners still have None access to Competitor Analysis.

Next, the Design Engineer adds a few documents to Competitor Analysis and starts a discussion regarding one of the documents. The Design Engineer also adds a design specification to the Preliminary Spec subfolder. He subscribes to the file so he is notified whenever the file is revised. He also pushes subscriptions for the Prototype folder to the workspace members from the other companies.

Route a Document and Schedule a Web Meeting

The Design Engineer then creates a route that sends the design spec to some members of the workspace: first to the two Design Engineers added individually to the workspace for comment and review, then to the project manager for approval, then to the Supplier for review and markup, and finally to both Manufacturing Engineers for review and markup. When defining the route, the Design Engineer indicates that as soon as one of the Design Engineers completes the review task, the next task in the route should become active. He also schedules a Web meeting for a day after the route is scheduled to be complete so the workspace members can review comments and changes. The meeting attendees receive email and IconMail notification about the meeting.

When the route begins, the Design Engineers receive email and IconMail notification that they have a task pending. They will also see the task listed on the Team Central task pages. One of the Design Engineers enters comments about the spec and marks the task as completed. The task for the other Design Engineer is removed and the task for the project manager is activated. After the project manager approves the spec and completes her task, the Supplier is notified that a task is pending. The Supplier revises the specification and checks in an updated version. Since the Design Engineer who created the workspace subscribed to the file, he receives notification that the file has been revised. When the Supplier marks the task complete, the file is routed to the Manufacturing Engineers. When they complete their tasks, the route is complete and the Design Engineer who created the route is notified. He reviews the comments, approval statuses, and files. He removes the files from the route so other people can route and edit it.

At the scheduled meeting time, the Design Engineer starts the Web meeting and the other attendees join in. The Design Engineer shares the most recent version of the design spec so they can discuss the changes. As a result of the meeting, the Design Engineer makes additional changes to the specification and saves it with a new file name. He adds the file to the Final Spec subfolder and then routes the document to the workspace members again.

Overview of Team Central Accesses

Team Central lets Workspace Leads control access to all the main components of a workspace, including the workspace itself, folders and subfolders, routes, content in folders (which can also be included in routes), and discussions.

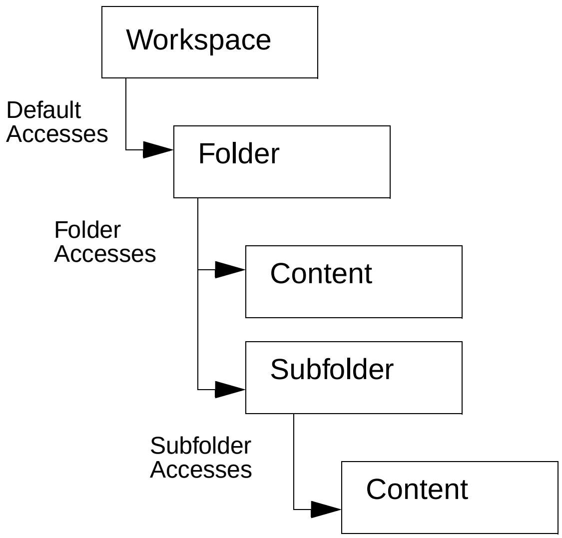
This section overviews important points to understand about the entire access model. For instructions on how to define accesses for each component, see:

- ***Defining a Member's Workspace and Default Accesses***
- ***Defining Access to Folders and Subfolders***
- ***Defining Access to a Discussion***

Important Points Regarding Accesses

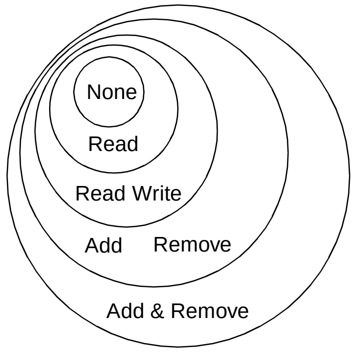
- **All people added to a workspace have Basic access to it.** This means they can view the workspace category list and Properties page, can create workspace-level discussions and participate in those discussions, can be added to workspace-scope routes, and can be added as meeting attendees. People with Basic access do not have access to any folders or content by default but Workspace Leads can give them access on a folder by folder basis.

- One of the most important points to remember when assigning accesses is that **accesses are inherited down the data hierarchy**. A member's default access for workspace content, which is set at the workspace level, defines the minimum access that person/role has for every folder. If not explicitly set, this is None. A member's access for a folder defines the minimum access the person/role has for every subfolder, and the member's folder/subfolder access defines the minimum access for every document in it (the folder access defines the ***exact*** access for non-document content items). The accesses for a content item apply even when the member accesses the item from a route or from another application. These minimum accesses can be added to but cannot be removed except by removing access on the parent item.



- **When you make any change to a person's access level at one point in the data hierarchy, the new access level replaces all inherited access down the data hierarchy and any additional accesses added at lower levels are removed.**

  For example, suppose a workspace member has Read access as the default access for the workspace and is given additional Add access to a folder. If you change the person's default workspace access, either making it higher (for example, Read Write) or lower (for example, Basic) the person's inherited access to the folder will now be the new default access and the additional access of Add is removed. Removing the additional access occurs whenever the access at the higher level is reset, regardless of whether the change is to a higher or lower access level.
- **Workspace Leads can give members additional accesses to a folder (accesses that are not inherited from the parent folder or subfolder) as long as the member has at least Read access to the parent folder or subfolder.** Similarly the owner of a document in a folder can give members who have at least Read access to the folder additional access to the document. Requiring at least Read access to the folder prevents a member from having access to content but not having access to the subfolder that contains it or having access to a subfolder but not to the parent folder.
- **Access levels build upon one another so when people are assigned one access level, they have all the permissions allowed in the lower levels, as shown in the below diagram**.



- **When a discussion is created, all the members who have at least Read access to the item being discussed can access the discussion.** The discussion creator can remove people from the access list as needed.
- **You cannot deny access per content item**. A person's access for folder content is inherited from the folder access and this inherited access cannot be removed. So everyone who has at least Read access to a folder has at least Read access to every item in the folder and this access cannot be removed except by removing access on the folder.
- **Routes do not inherit accesses from any other workspace component.** The access levels assigned for a route are for the route itself (such as the ability to add and remove content from the route) and are separate from accesses for the route content. For example, a route member who has Add access for a route can view the route and add content to it. But the accesses the person has to each content item in the route depends on the accesses assigned within the item's folder. The person might have no access to one item, Read Write access to another, and Remove access for another. All these accesses are independent of the route access.
- **Accesses for non-document folder content (RFQs, packages, quotations) cannot be controlled per item.** A member's access to non-document content is the same as the person's folder access. Additionally, Team Central accesses add to accesses given by Sourcing Central. They do not restrict access given by Sourcing Central.

Workspace Accesses

Workspace Members

People who are added to a workspace can access the workspace from their list of workspaces and have Basic access for the workspace. This includes people added individually, people added because they are assigned to an associated Buyer Desk, and people assigned to a role that is added to the workspace. Basic access to a workspace means they can create discussions for the workspace, be included in workspace-scope routes, and be added as attendees for Web meetings. With Basic access, they don't have access to any folders by default but a Workspace Lead can give them access on a folder-by-folder basis.

The only people who can access a workspace and its content are the workspace members. There are three types of workspace members: Persons, Buyer Desk Persons, and Roles.

Person Members

When a Workspace Lead adds a person individually to a workspace, the member type is Person. Any person in the workspace owner's company or in a collaborating company can be added individually. Unlike people who have access to a workspace because of a role assignment, person members can participate fully in the workspace: they can be assigned individually to routes, added as meeting attendees, assigned as a workspace owner or Workspace Lead, etc.

Buyer Desk Person Members

Another way to add persons to a workspace is for the workspace owner to associate a Buyer Desk with the workspace. All buyers in the Buyer Desk are added as members of the workspace. The system automatically updates the membership list as buyers are added and removed from the Buyer Desk. (Buyers are added and removed from a Buyer Desk from within Sourcing Central.)

There is one important difference between Person members and Buyer Desk Persons. People added individually can be removed individually, as long as the person is not the workspace owner or a member of a route. People added because they belong to the associated Buyer Desk cannot be removed individually from the workspace except by removing the person from the Buyer Desk. The workspace owner can remove all Buyer Desk Persons by removing the workspace's association with the Buyer Desk. If a Buyer Desk Person is removed from the Buyer Desk or the Buyer Desk is disconnected from the workspace and the person is the workspace owner or a member of a route, the system changes the person's member type to Person and does not remove the person from the workspace.

If a person is added individually to a workspace and also is a member of the associated Buyer Desk, the system treats the person as a Buyer Desk person.

Role Members

When a Workspace Lead adds a role to a workspace, all people assigned to the role in the workspace creator's company have access to the workspace. As people are assigned and unassigned to the role, they gain and lose access to the workspace. Role members can't participate as fully in the workspace as those assigned individually:

- Route creators can add a role to a route and assign the role to a task. Any person in the workspace creator's company who is assigned to the role can accept the task and that person becomes the task assignee. The route creator cannot assign a role member to the task specifically.
- Roles cannot be assigned to meetings.
- Roles cannot be given Workspace Lead, Create Route, or Create Folder access.

If you need a person in the role to participate in any of these features, you should add the person to the workspace individually.

Workspace Owner

When a person creates a workspace, that person becomes the owner. The owner can reassign ownership to someone else. The workspace owner has privileges no other user can perform, such as the ability to edit the workspace properties, reassign ownership, associate and disassociate a Buyer Desk, archive and reactivate the workspace, and push subscriptions for the workspace.

Workspace Leads

Workspace Leads can add and remove people from the workspace and assign accesses for workspace components. They can 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. Roles cannot be assigned Workspace Lead access.

Create Route Access

Members with Create Route access can create workspace-scope routes and folder-scope routes for folders they have Read access to. Roles cannot be assigned Create Route access.

Workspace-Wide Default Access for Folders and Content

Workspace Leads can assign default accesses for all folders and content in the workspace. A member's default access defines the minimum access the member has for every folder, subfolder, and content item in the workspace, but has no affect on access to other workspace components, such as routes, meetings, and discussions. Members can be given a higher access to individual folders and documents but they cannot be given less access than their default access. For example, if a member's default access is Read, the person will have Read access to every folder, subfolder, and content item in the workspace and this access cannot be removed (except by changing the default access). If there is one folder that the person should not have at least Read access to, the person's default access must be Basic.

Each default access is summarized below. For information on folder and content accesses, see ***Understanding Folder and Subfolder Access***.

Basic—For every top-level folder in the workspace, the member has an inherited access of None. A Workspace Lead can give the person a higher access on a folder-by-folder basis and these added accesses will transfer as inherited accesses for the folder's content and subfolders. As with all default accesses, Basic access only affects the member's access for folders. Members with Basic access can participate in all other workspace activities, such as creating discussions for the workspace, participating in workspace-scope routes, and attending Web meetings, etc.

Read—For every top-level folder in the workspace, the member has an inherited access of Read and this access cannot be removed except by changing the default access. A Workspace Lead can give the person a higher access on a folder-by-folder basis and these added accesses will transfer as inherited accesses for the folder's content and subfolders.

Read Write, Add, Remove, Add Remove—For every top-level folder in the workspace, the member has an inherited access that is the same as the workspace default access (Read Write, Add, Remove, Add Remove). This access cannot be lowered except by changing the default access. A Workspace Lead can give the person a higher access on a folder-by-folder basis and these added accesses will transfer as inherited accesses for the folder's content and subfolders. Workspace Leads can then give the person a higher access per subfolder and content (documents only).

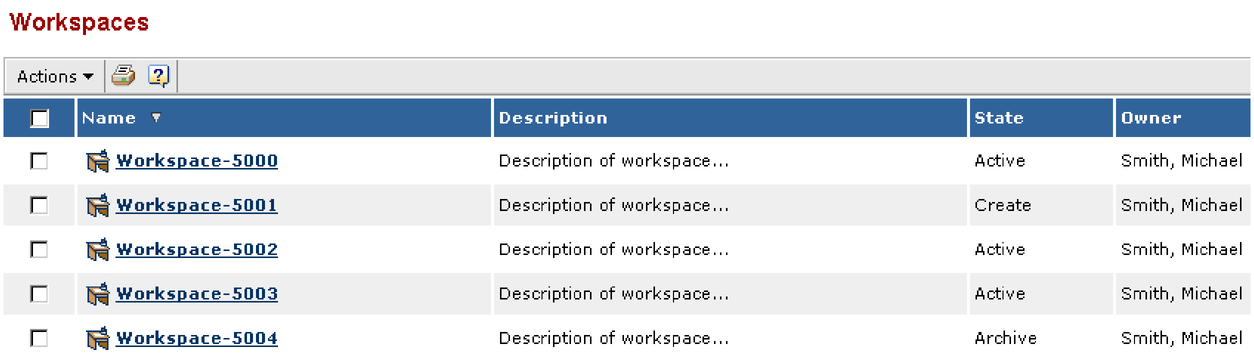
Listing Your Workspaces

You can see all the Active workspaces that you belong to and all workspaces that you own by clicking **Team** > **Workspaces** from the My Desk menu. You can reduce this list so it includes only active workspaces. You may belong to some workspaces because you are assigned to a role that has been added to the workspace (only if you belong to the same company as the person who created the workspace).

To list your workspaces

1. Click **My Desk** > **Team** > **Workspaces**.

   The Workspaces page opens, listing all workspaces that you are a member of and that you own. If you own a workspace, it is listed no matter what its state. If you are a member but not the owner, the workspace is listed only if it is in the Active state.



   For each workspace, the page shows:

   Name—The name entered by the person who created the workspace. To get information about the workspace, click its Name.

   Description—The purpose of the workspace, for example the type of data it is intended to manage, as entered by the person who created the workspace.

   State—When a person first creates a workspace, its state is Create. During this state, the owner adds folders and members and assigns accesses. Only the owner can access a workspace that is in the Create state. The owner cannot add content to the workspace or create routes. When ready for members to work with the workspace, the owner activates it, which changes the state to Active. All members can then access the workspace. When no further work should be done, the owner archives it, which changes the state to Archive. Archiving a workspace removes all members from the access list, so no one except the owner can access it.

   Owner—The person who has primary responsibility for the workspace. When a person creates a workspace, that person becomes the owner. The owner can reassign ownership to someone else. The workspace owner has privileges no other user can perform, such as the ability to edit the workspace properties, reassign ownership, archive and reactivate the workspace, and push subscriptions for the workspace.

2. To shorten the list so it includes only Workspaces in the Active states, choose **Active** from the drop-down list in the upper right corner of the page.

3. Work with workspaces as needed:

   - To get more information about a workspace, click its **Name**. See ***Viewing Information about a Workspace***.
   - To create a new workspace, click the **Actions** menu and then select **Create New** or **Workspace Wizard**. Create New creates just the basic workspace definition and lets you add folders and members separately. The wizard lets you add folders, subfolders, and members as you create the workspace. See ***Creating a New Workspace***.

- To delete a workspace, check it and click **Delete** from the page Actions menu. You can only delete workspaces that you own. For more restrictions on deleting workspaces, see ***Deleting a Workspace***.

Viewing Information about a Workspace

Any member of a workspace can get information about the workspace, including basic properties, discussions, and folders. You can also see your routes, tasks, meetings, and subscriptions for the workspace.

To see information about a workspace

1. From the My View page, click the **Name** of the workspace.

Or

Click **My Desk > Team** > **Workspaces**. Then click the **Name** of the workspace.

The workspace's category list and Properties page opens.

Name—A short, descriptive name for the workspace.

Template—The name of the template on which this workspace is based.

Image—An image file associated with the workspace.

Owner—The person who has primary responsibility for the workspace. When a person creates a workspace, that person becomes the owner. That person can then reassign ownership to someone else. The current owner always has Workspace Lead access and Add Remove access for all folders and content. Only the workspace owner can edit workspace properties, reassign ownership of the workspace, push subscriptions for the workspace to other users, and archive the workspace.

Originated—The date/time the workspace was created.

State—When a person first creates a workspace, its state is Create. During this state, the owner adds folders and members and assigns accesses. Only the owner can access a workspace that is in the Create state. The owner cannot add content to the workspace or create routes. When ready for members to work with the workspace, the owner activates it, which changes the state to Active. All members can then access the workspace. When no further work should be done, the owner archives it, which changes the state to Archive. Archiving a workspace removes all members from the access list, so no one except the owner can access it.

Buyer Desk—The Buyer Desk associated with the workspace, if there is one. A Buyer Desk is a sourcing sub-team, which includes parts the team is responsible for sourcing, buyers who source the parts, and Request for Quotes (RFQs) that have been created to source the parts. When a Buyer Desk is associated with a workspace, all buyers assigned to the Buyer Desk are automatically added to the workspace. To get information about the Buyer Desk, click its name. Only one Buyer Desk can be associated with a workspace.

Description—The purpose of the workspace, for example the type of data it is intended to manage.

2. Using the links at the top of the Properties page, work with the workspace as needed. Depending on whether you are a Workspace Lead and the workspace's state, some links may not be available.
   - To edit the properties listed, click **Edit Details** from the page Actions menu. See ***Editing Workspace Details***.
   - To save this workspace so you can use it to create other workspaces, click **Save As Template** from the page Actions menu. See ***Saving a Workspace as a Template***.
   - To choose alert events that you want to subscribe to, click **Subscribe** from the page Actions menu. See ***Choosing Alert Events for a Workspace***.
   - To have the system notify members when specific events occur for the workspace (set subscriptions for other users), click **Push Subscriptions** from the page Actions menu. See ***Choosing Alert Events for Others***.
   - To activate a workspace that is in the Create state, click **Activate** from the page Actions menu. See ***Activating a Workspace***.
   - To archive an Active workspace, click **Archive** from the page Actions menu. See ***Archiving a Workspace***.
   - To reactivate an archived workspace, click **Reactivate** from the page Actions menu. See ***Reactivating an Archived Workspace***.
3. Use the category list to view more information about the workspace:

Category	Description	For details, see:
Access	Shows the workspace members and the accesses they are granted. Lets the workspace owner set accesses.	***Defining a Member's Workspace and Default Accesses***
Discussions	Shows message threads created for the entire workspace.	***Listing Discussions for an Item***
Folders	Lists the top level folders for the workspace and lets you access subfolders within them.	***Listing Folders in a Workspace***

Category	Description	For details, see:
Meetings	Shows meetings for the workspace that you are included in and lets you schedule, start, and join meetings.	***Listing Meetings You are Participating In*** in Chapter 4
Routes	Lists the active routes for the workspace that you created or have a task for.	***MatrixOne Common Components User Guide***.
Subscriptions	Lists the events that you have subscribed to for the workspace.	***Viewing Your Subscriptions***
Tasks	Lists all your active tasks for the workspace.	***MatrixOne Common Components User Guide***.

Creating a New Workspace

To create a new workspace that can be used by its members, you need to enter basic information for it, add folders and subfolders, and add members and assign member access. The Actions menu on the Workspaces page, which lists your workspaces, contains two options for creating workspaces:

- **Create New**

  This is a quick-create option that lets you enter basic information for the workspace, such as name, associated Buyer Desk, and description. After creating the workspace, you can add folders and members when you're ready. The system automatically adds any predefined folders to the workspace, which you can remove, edit, and add to as needed. The quick-create option is best if you aren't ready to define the folders and members yet.

  This is a quick-create option that lets you enter basic information for the workspace, such as name, template, associated Buyer Desk, and description. After creating the workspace, you can add folders and members when you're ready, or have them automatically added from a template. The system adds any predefined folders to the workspace, which you can remove, edit, and add to as needed. The quick-create option is best if you aren't ready to define the folders and members yet, or if you have a pre-existing template that is similar to the workspace you want to create.

- **Workspace Wizard**

  This wizard walks you through all the steps needed to define the workspace, add folders and subfolders, and add members. This option is best if you know most of the folders and members that you want to add to the workspace and are ready to get started. The wizard also provides the option of choosing a template on which to base the workspace.

This section contains instructions for both options.

- ***Quick-Creating a Workspace***
- ***Creating a Workspace and Adding Folders and Members***

When you're ready for members to begin working with the workspace, you need to activate it, as described in ***Activating a Workspace***.

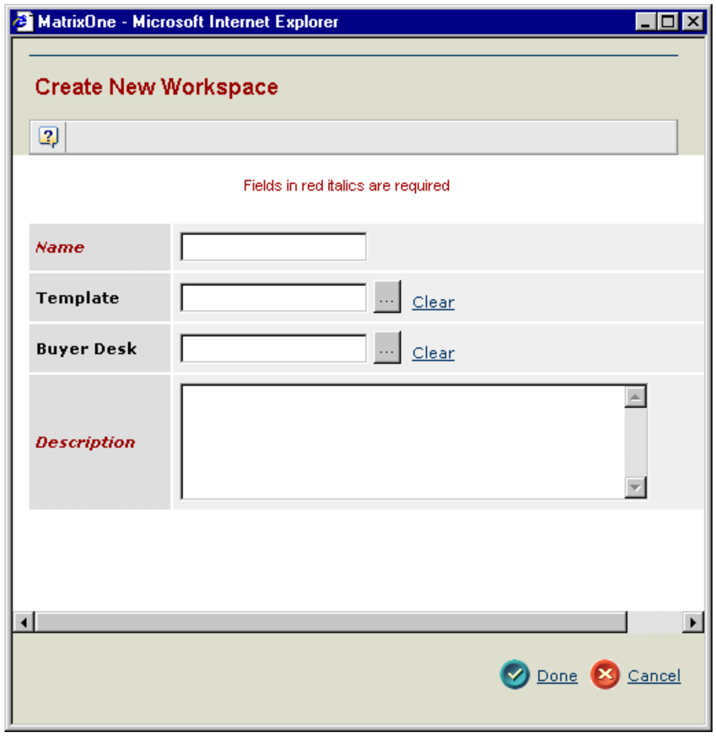
Quick-Creating a Workspace

To quickly create a workspace

1. Click **My Desk** > **Team** > **Workspaces**.

2. From the Workspaces page, click **Create New** from the page Actions menu.

   The Create New Workspace page opens.



3. Enter a short, descriptive **Name** for the workspace.

   Do not use a name that has already been used for a workspace created for your company. All members will use this name to access and work with the workspace.

4. You can quickly create a workspace complete with members and folder structure by using a template that has previously been saved. Click next to **Template**. See ***Selecting a Workspace Template***.

5. If using Sourcing Central, you can associate the workspace with a Sourcing Central **Buyer Desk**. Click next to **Buyer Desk**. See ***Selecting a Buyer Desk***.

6. In the **Description** box, enter the intent or purpose of the workspace. For example, specify the type of data the workspace will manage.

7. Click **Done**.

   The new workspace is listed on the Workspaces page. When you're ready, you should add folders and members to the workspace. See ***Creating a Folder or Subfolder*** and ***Adding a Workspace Member***. When you're ready for members to use the workspace, you should Activate it. See ***Activating a Workspace***.

Creating a Workspace and Adding Folders and Members

This section describes how to use the Workspace wizard to create a workspace, add folders, and add members. The wizard contains four main pages that allow you:

- ***To enter basic information for a new workspace***
- ***To specify the top-level folders for the workspace***

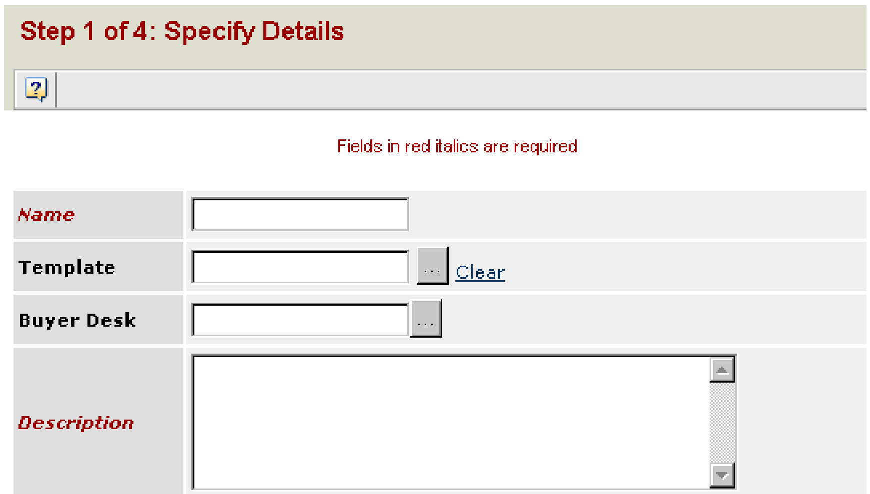
- *To add subfolders to a workspace's folders*
- *To add members to a workspace and specify default accesses*

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. Information is committed to the database as you progress through each page.

To enter basic information for a new workspace

1. Click **My Desk** > **Team** > **Workspaces**.
2. From the Workspaces page, click **Workspace Wizard** from the page Actions menu.

   The Specify Details page opens.

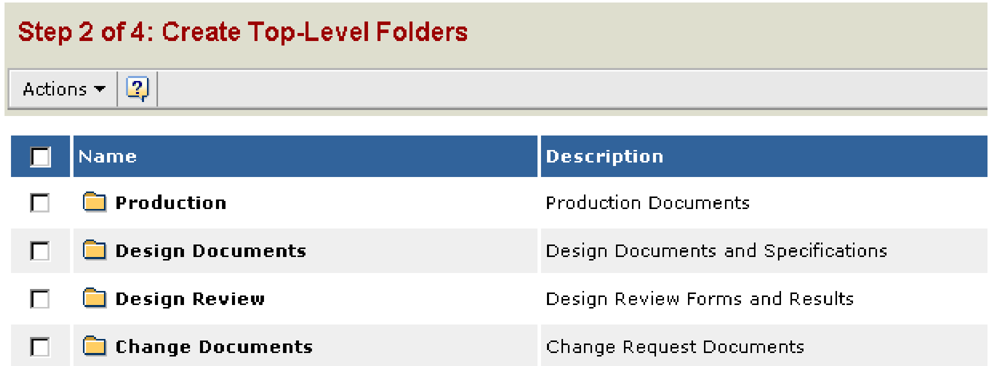
3. Enter a short, descriptive **Name** for the workspace.

   Do not use a name that has already been used for a workspace created for your company. All members will use this name to access and work with the workspace.
4. You can quickly create a workspace complete with members and folder structure by using a template that has previously been saved. Click  next to **Template**. See *Selecting a Workspace Template*.
5. If using Sourcing Central, you can associate the workspace with a Sourcing Central **Buyer Desk**. Click  next to Buyer Desk. See *Selecting a Buyer Desk*.
6. In the **Description** box, enter the intent or purpose of the workspace. For example, specify the type of data the workspace will manage.
7. Click **Next**.

   Team Central opens the page for the second step, the Create Top-Level Folders page. If you are creating the workspace from a template that contained top-level folders, they are shown on this page. You can add to or remove any of these folders.

To specify the top-level folders for the workspace

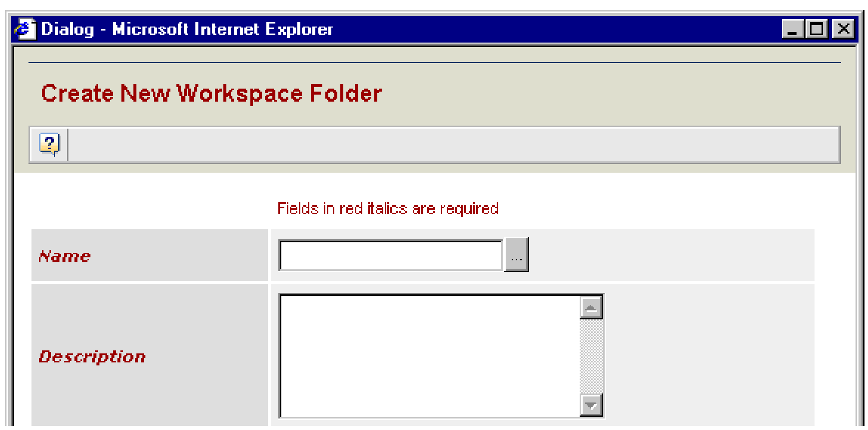
1. Select one of the folders listed.



A ***folder*** is a container for files that concern a particular subject. In the third step of the wizard, you can define custom subfolders for each top-level folder. If they have the appropriate access, workspace members can view and revise content in the folders, participate in discussions about the content, route the content to other team members, and have Web meetings in which attendees can discuss, view, and mark up the content.

2. To add a folder that is not already listed:

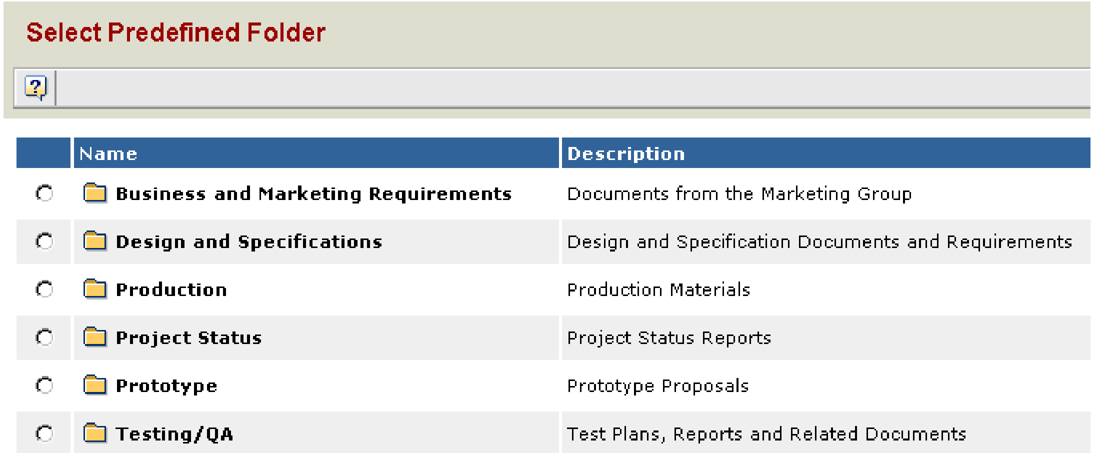
a) Click **Create New** from the page Actions menu.



b) Enter a **Name** for the folder. This is the name you will use to track the folder so it should be short and descriptive. Do not use the same name as used for another top-level folder in the workspace.

Or

Choose the name of a predefined folder by clicking [...]. If no folders have been predefined for your system or if all predefined folders have been added to the workspace, the Browse button is unavailable. Choose a predefined folder. Click **Done**.



c) Enter a **Description** for the folder to describe the folder's intent or purpose. If you chose a predefined folder, you can edit the description.

d) Click **Done**.

3. To remove a folder:

a) From the Create Top-Level Folders page, check the folder(s) you want to remove.

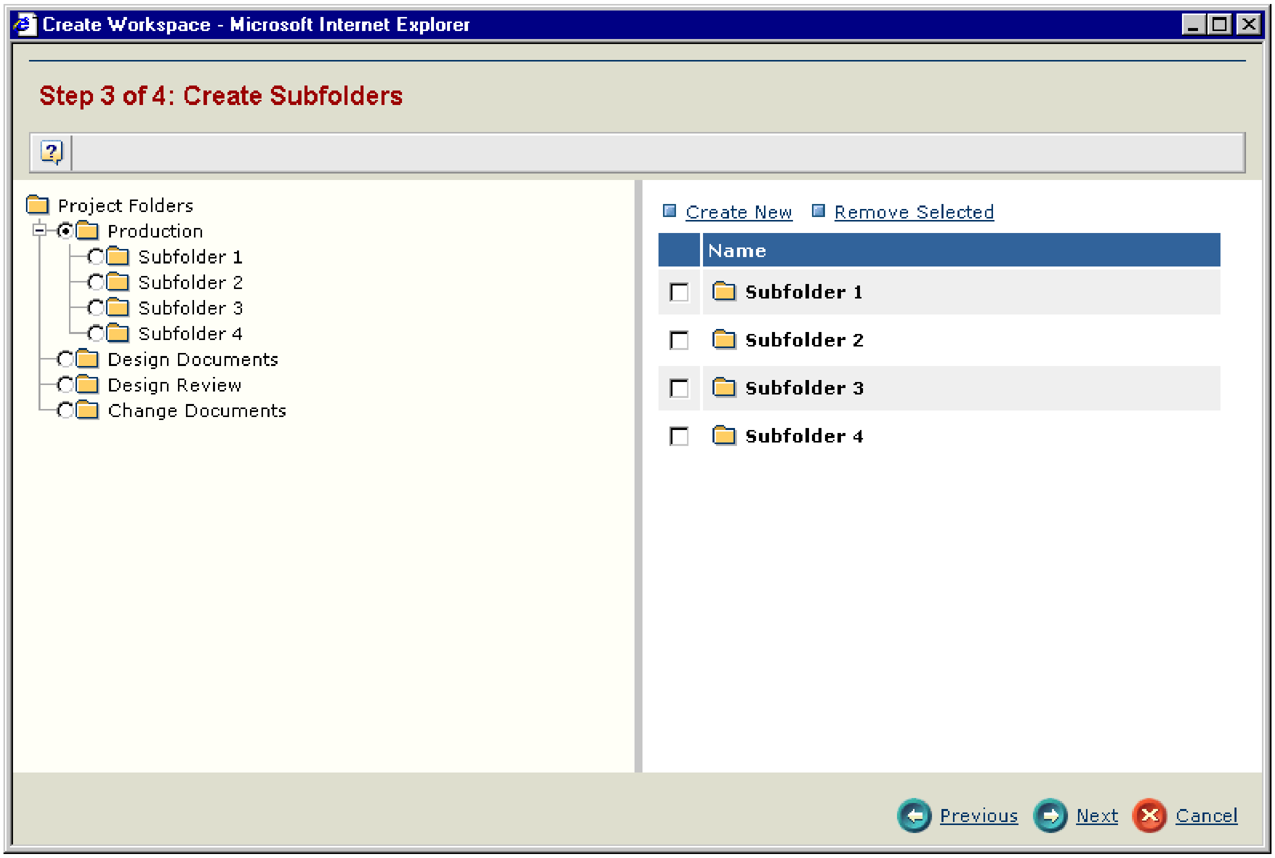
b) Click **Remove** from the page Actions menu.

c) At the confirmation message, click **OK**.

4. Click **Next**.

The Create Subfolders page opens, listing all the top-level folders on the left. If you are creating the workspace from a template that contained subfolders, they are also shown on this page. You can add to or remove any of these subfolders.

To add subfolders to a workspace's folders

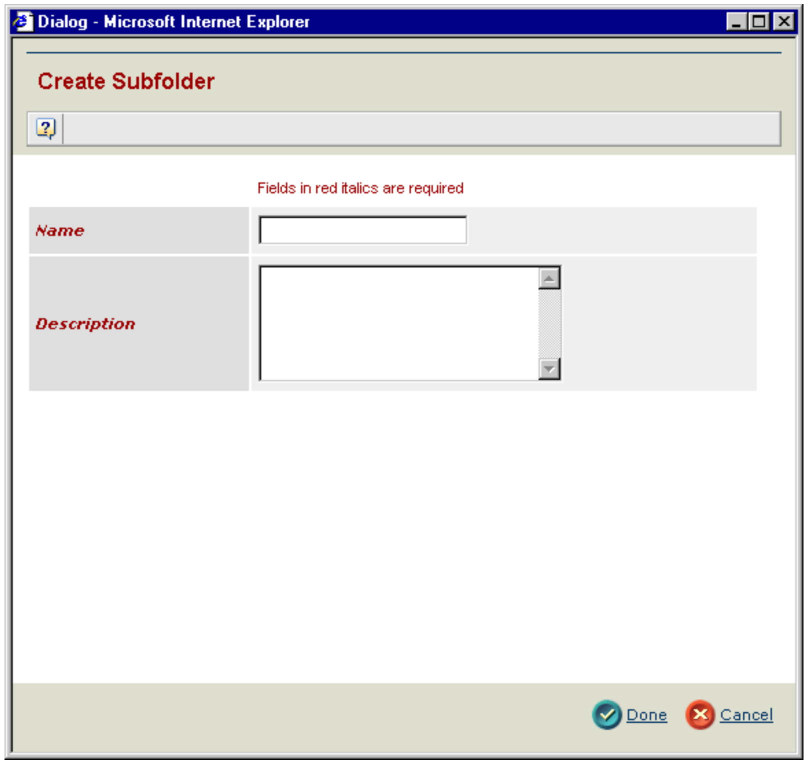


A subfolder is a container for documents and other content that are grouped within a folder. You will probably want to create subfolders if you anticipate that a folder will have a lot of content and this content can be logically grouped into more than two sets. If you don't want to add subfolders, you can click Next and proceed with adding workspace members.

After creating the workspace, you can add subfolders to subfolders. See ***Creating a Folder or Subfolder***.

1. To add subfolders to a folder:

- **a)** From the left side of the Create Subfolders page, choose a folder that needs subfolders.
- **b)** Any subfolders already added are listed on the right.
- **c)** Click **Create New** from the page Actions menu.



d) Enter a **Name** for the subfolder.

This is the name you will use to track the subfolder so it should be short and descriptive. Do not use the same name as used for another subfolder in the folder. A top-level folder cannot have two second-level subfolders with the same name.

e) Enter a **Description** for the subfolder to explain the folder's intent or purpose.

f) Click **Done**.

2. To remove a subfolder from a folder:

a) From the Create Subfolders page, choose the folder that contains the subfolder you want to remove.

b) On the right side of the Create Subfolders page, check the subfolders you want to remove.

c) Click the Actions menu and select **Remove**.

d) At the confirmation message, click **OK**.

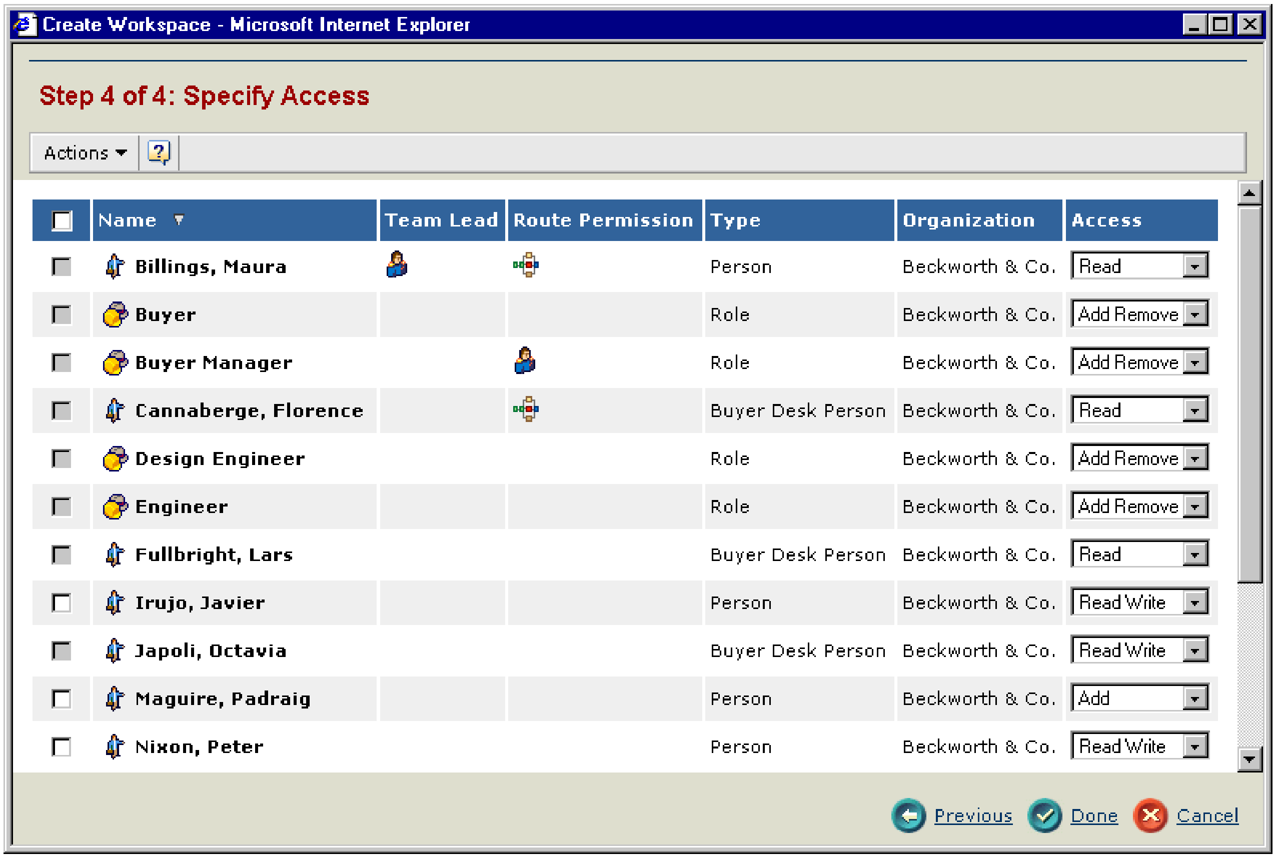
3. When you are finished adding subfolders, click **Next**.

The Specify Access page opens, letting you add members to the workspace and define their default access. If you associated a Buyer Desk to the workspace, all members of the Buyer Desk are listed and their member type is Buyer Desk Person. If you are creating the workspace from a template, all members included in the workspace template are shown on this page.

To add members to a workspace and specify default accesses

Only people who are added as workspace members can access workspace information. Therefore, anyone who will need to access folder content, attend Web meetings, participate in discussions, create routes, or receive routed information should be added as a workspace member. As the workspace creator, you are automatically added as a member.

1. Select one or more members for the workspace.



For each member of the workspace, the page shows:

Name—The name of the person or role assigned to the workspace.

Team Lead —Indicates whether the person is a team lead.

Route Permission—Icons indicate the type of route permission.

Type—Distinguishes between roles added to the workspace, people added individually, and people added because they belong to the associated Buyer Desk. For more information about each type of member, see ***Workspace Accesses***.

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

Access—Use to set the default access for each member. A person's default access is transferred to every folder, subfolder, and content item in the workspace. The workspace owner and Workspace Leads can give a member higher accesses for individual folders and content but they cannot give the member a lower access than the default access. For example, if you choose Read access for a member's default access, the person will have Read access to every folder, subfolder, and content item in the workspace and this access cannot be removed (except by changing the default access). If there is one folder that the person should not have Read access to, you must make the person's default access Basic. Basic access means that by default the person has no access to folders and content but Workspace Leads can give the person access on a folder by folder basis. You can always give the person a higher access for specific folders and content items.

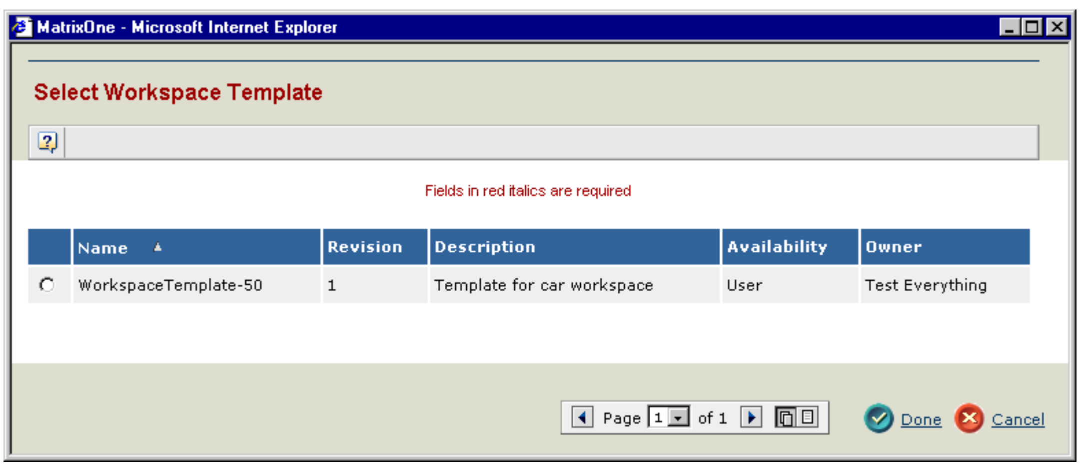
2. Click **Done**, if everyone you want for the workspace can be selected from the list.
3. To add a new person to the workspace:
   a) From the Specify Access page, click **Add Member(s)** from the page Actions menu.
   b) See ***Adding a Workspace Member*** for searching for members.

Selecting a Workspace Template

When creating a workspace you can select a workspace template that will include the template's members and folder structure.

When members are copied to the new workspace from the template, also copied are fields that determine if they are Workspace Leads and if they can create a Route in the workspace. Grants from the Workspace Member Grantor and from the Workspace Lead Grantor are also replicated. The access on the folder/sub-folder level is not carried over, so the access granted by the Workspace Access Grantor is not required. The workspace creator/lead can then give additional access to the members. All leads will have Add Remove access on the workspace, while all other members will have Basic access irrespective of their access on the workspace that was used to create the template.

1. On the page for creating a workspace, click next to **Template**.



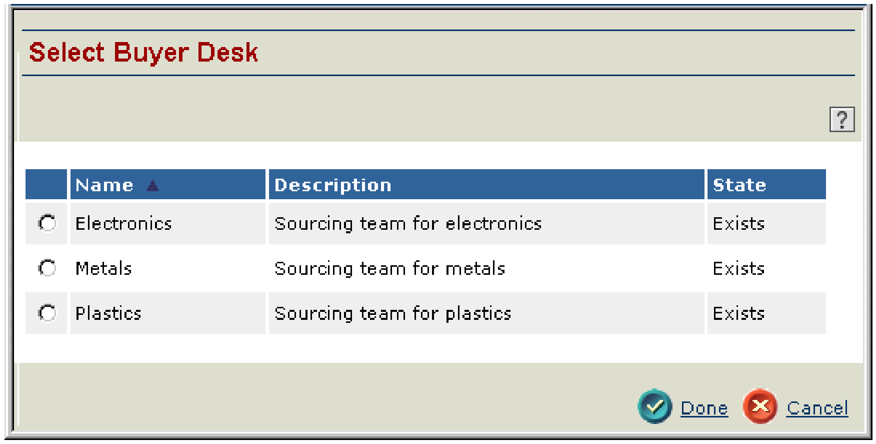
All workspace templates that you own or are of Enterprise scope are shown.

2. Choose a workspace.
3. Click **Done**.

Selecting a Buyer Desk

Selecting a buyer desk is only available if your system has Sourcing Central installed. A Buyer Desk is a sourcing sub-team, which includes parts the team is responsible for sourcing, buyers who source the parts, and Request for Quotes (RFQs) that have been created to source the parts. When a Buyer Desk is associated with a workspace, all buyers assigned to the Buyer Desk are automatically added to the workspace.

1. Click  next to Buyer Desk.



2. From the list of Buyer Desks for your company that have not already been associated with a workspace, choose a Buyer Desk.
3. Click **Done**.

Editing Workspace Details

The owner of a workspace can edit the basic information for a workspace and assign ownership to someone else. When you assign someone else as the owner, that person receives Workspace Lead and Create Route accesses. You retain these accesses but are no longer listed as the owner and therefore can no longer perform owner-only tasks, such as editing workspace details, reassigning ownership, and archiving.

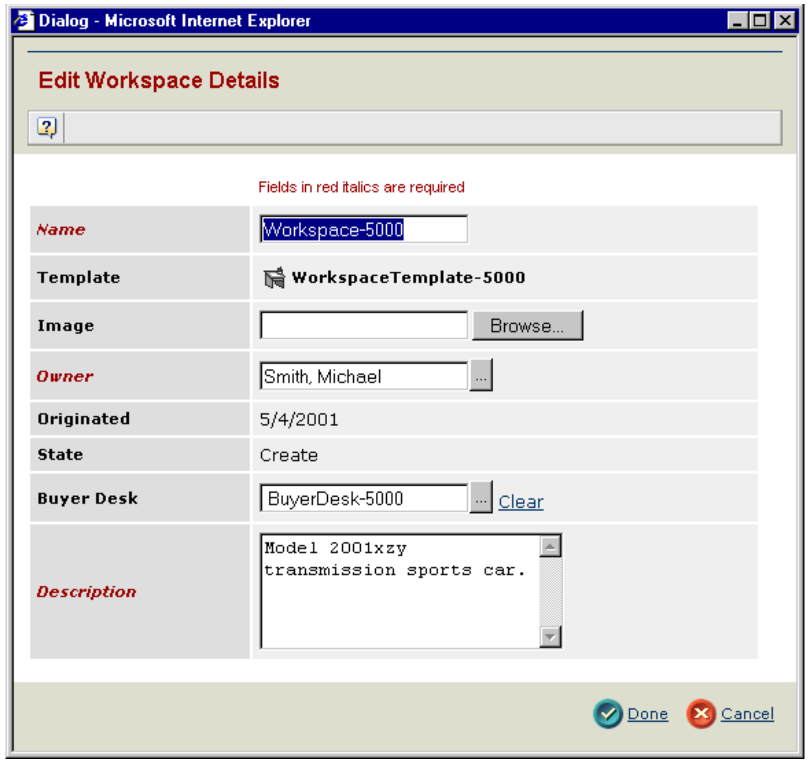
To edit the details for a workspace

1. From the My View page, click the **Name** of the workspace.

   Or

   Click **My Desk** > **Team** > **Workspaces**. Then click the **Name** of the workspace. If the workspace is not active, make sure **All** is selected from the drop-down list.
2. From the Properties page, click **Edit Details** from the page Actions menu.

   The Edit Workspace Details page opens.



3. Change the **Name** for the workspace, as needed.

   Do not use a name that has already been used for a workspace created for your company. All members will use this name to access and work with the workspace.

4. Change the **Image** for the workspace. Click the **Browse** button. From the Choose a File dialog box, choose or change the **Image** file (.gif, .jpg, .html, or .htm) to represent the workspace.

5. Use the **Owner** box to make any other user from your company the owner of the workspace. Be aware that if you make someone else the owner, you will no longer be the owner and therefore will not be able to change ownership again.

   a) Click ... next to your name in the Owner field.

   b) From the list of people from within your company on the Select Workspace Owner page, choose the new owner and click **Done**.

   The Edit Workspace Details page refreshes to show the new owner instead of your name.

6. Use the Buyer Desk box to assign, change, or remove the Buyer Desk association for the workspace:

   - To associate the workspace with a Sourcing Central **Buyer Desk** or change the current association to another Desk, click ... and select a Buyer Desk created for your company. You can only associate one Buyer Desk with a workspace and you can only associate Buyer Desks that have not already been associated with a workspace.
   - To remove the association with a Buyer Desk, click **Clear**.

If you remove a Buyer Desk association, all of its buyers are removed as members of the workspace. If you change the association, the system removes all members of the previously-associated Buyer Desk and adds buyers from the new Buyer Desk. If you disconnect a Buyer Desk and one of the assigned buyers is the workspace owner or a route member, the system changes the person's member type from Buyer Desk Person to Person and does not remove the person. If you associate a Buyer Desk with an assigned buyer who is also added individually to the workspace, the system treats the person as a Buyer Desk Person, which means the person cannot be removed individually from the workspace and if the Buyer Desk is disconnected, the system removes the person (unless the person is the workspace owner or a route member).

7. Revise the **Description** as needed.

   The description typically reflects the intent or purpose of the workspace. For example, specify the type of data the workspace will manage.

8. Click **Done**.

   If you made someone else the owner, the links available only to the owner are removed, such as the Edit Details, Push Subscriptions, and Archive links.

Activating a Workspace

When a workspace it first created, its state is Create. When a workspace is in the Create state, only the owner can access it. When a workspace is in the Create state, the owner can add members, folders, content, and create discussions but cannot create routes. Standard members cannot access the workspace or any of its content until the workspace is activated. When you, the owner, are ready for members to work with the workspace (you have added some folders and assigned member accesses), you should Activate it. Only the workspace owner can activate a workspace.

Before activating the workspace, you may want to assign accesses to folders and set up task due date notifications. See ***Defining Access to Folders and Subfolders*** and setting up task due date notifications in the ***MatrixOne Common Components User Guide***.

To activate a workspace that you own

1. Click **My Desk** > **Team** > **Workspaces**.
2. Make sure **All** is selected from the drop-down list in the upper right corner.
3. Click the **Name** of the workspace.
4. Click the **Actions** menu and select **Activate**.
5. At the confirmation message, click **OK**.

   The workspace's state changes to Active and members can now access and work with the workspace.

Archiving a Workspace

When a workspace and all of its routes and meetings are complete, the workspace owner can archive it. Archiving a workspace removes all of its members, so they can no longer work on it or access it. The workspace owner can still access the workspace, if needed, and view all completed routes, folder content, and other information for the workspace. The owner cannot make changes to an archived workspace though, such as adding folders or changing content.

Before you can archive a workspace, all of its routes and meetings must be completed or deleted. You can only archive Active workspaces.

To archive a workspace

1. From the My View page, click the **Name** of the workspace.

   Or

   Click **My Desk** > **Team** > **Workspaces**. Then click the **Name** of the workspace.

2. Click the **Actions** menu and select **Archive**.

3. At the confirmation message, click **OK**.

   The workspace's state changes to Archive and the system removes all members.

Reactivating an Archived Workspace

The owner of a workspace can reactivate it after it has been archived. Reactivating a workspace changes its state from Archive to Active. For example, suppose you archive a workspace because the project it manages is postponed indefinitely and then the project is rescheduled to be completely shortly. Reactivating the workspace lets you add members to the workspace again. (Archiving the workspace removes all members and these members are not re-instated automatically when you reactivate the workspace.)

To reactivate a workspace that you own

1. Click **My Desk** > **Team** > **Workspaces**.

2. From the Workspaces page, make sure **All** is selected from the drop-down list.

3. Click the **Name** of the archived workspace.

4. Click the **Actions** menu and select **Reactivate**.

5. At the confirmation message, click **OK**.

   The workspaces state changes back to Active so the workspace is listed again on your My View page. You should now add members and assign access to the workspace so they have access to the folders. See ***Defining a Member's Workspace and Default Accesses***.

Deleting a Workspace

The owner of a workspace can delete it if the workspace contains no folders with content, no routes, and no discussions. Since these items can't be added to a workspace when it's in the Create state, the owner can delete workspaces in the Create state. When you delete a workspace, the system also deletes its folders and subfolders (which must be empty anyway).

To delete a workspace

1. Click **My Desk** > **Team** > **Workspaces**.

2. From the Workspaces page, check the workspace(s) you want to delete. If the workspace is not Active, make sure All is chosen from the drop-down list.

3. Click **Delete** from the page Actions menu.

4. At the confirmation message, click **OK**.

   If you one or more workspace couldn't be deleted, the system presents an error message. No changes are made to any of the selected workspaces.

Workspace Members

This section describes how to view information about and work with workspace members. Typically, the workspace creator adds members when creating a workspace. As the workspace progresses, Workspace Leads can add and remove members as needed.

- *Listing the Members of a Workspace*
- *Viewing Information about a Workspace Member*
- *Adding a Workspace Member*
- *Removing a Workspace Member*
- *Defining a Member's Workspace and Default Accesses*

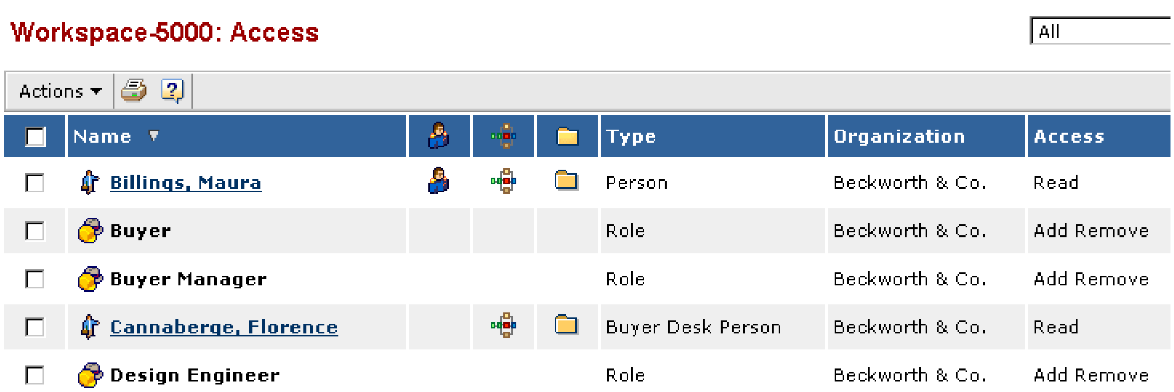
Listing the Members of a Workspace

Clicking **Access** from the category list for a workspace shows the Access page for the workspace. This page lists all the members assigned to the workspace and shows their workspace and default accesses. People designated as a Workspace Lead for the workspace can use the page to add and remove members and change accesses.

Everyone who needs access to a workspace component must be added as a member, either individually, by virtue of belonging to an added role, or by virtue of belonging to an added Buyer Desk. This includes any person who needs to be included in a route, who needs to view folder content, who needs to be a Web meeting attendee, or who needs to participate in discussions about workspace components.

To list the members of a workspace

1. Click **My Desk** > **Team** > **Workspaces**.
2. From the Workspaces page, click the **Name** of the workspace you want to work with.
3. From the category list for the workspace, click **Access**.



For each member, the page shows:

Check Box—Workspace Leads can use the check box to remove a member or role from the workspace. Buyer Desk Persons cannot be removed individually except by removing the person from the Buyer Desk through Sourcing Central and therefore their check box is grayed. The check box for the workspace owner and any member who is in a route is also gray, meaning these people cannot be removed.

Name—The name of the person or role assigned to the workspace. To see a profile of a person (Persons and Buyer Desk Persons only), click the member's Name.

Workspace Lead access—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 add and remove folders and subfolders, and have access to all routes, even those they don't belong to. The workspace owner is automatically assigned Workspace Lead access.

Create Route access—The Create Route icon indicates that the member can create any workspace-scope route and any route for a folder to which they have Read access.

Create Folder Permission—The Create Folder icon indicates that the member can create folders in the workspace.

Type—Distinguishes between roles added to the workspace, people added individually, and people added because they belong to the associated Buyer Desk. For information on how these types differ, see ***Workspace Accesses***.

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

Access—Shows the default access for each member. A member's default access is transferred to every folder, subfolder, and content item in the workspace but has no affect on other components in the workspace, such as routes, discussions, and meetings. Workspace Leads can give a member higher accesses for individual folders and content but they cannot give the member a lower access than the default access. For example, if you choose Read access for a member's default access, the person will have Read access to every folder, subfolder, and content item in the workspace and this access cannot be removed (except by changing the default access). If there is one folder that the person should not have Read access to, you must make the person's default access Basic. You can always give the person a higher access for specific folders and content items. For more information, see ***Workspace-Wide Default Access for Folders and Content***.

4. 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**.

5. The workspace owner and Workspace Leads can work with the access list as needed:
   - To add a member, click **Add Workspace Member(s)** from the page Actions menu. See ***Adding a Workspace Member***.
   - To remove a member, check the member and click **Remove Selected** from the page Actions menu. See ***Removing a Workspace Member***.
   - To edit accesses, click **Edit Access** from the page Actions menu. See ***Defining a Member's Workspace and Default Accesses***.

Viewing Information about a Workspace Member

Clicking a workspace member's name from the Access page opens the category list and Properties page for the person, which list the person's profile information.

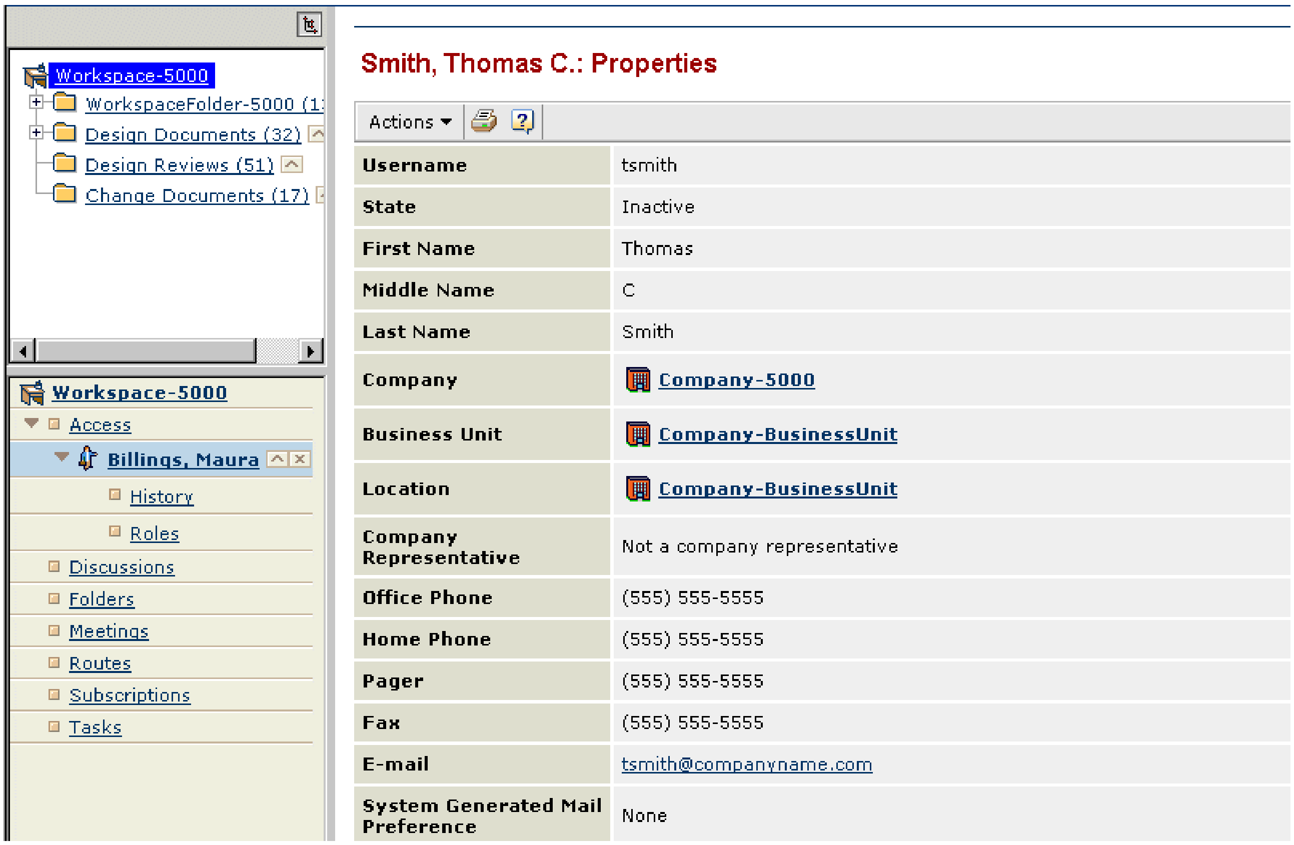
To view profile details about a workspace member

1. Click **My Desk** > **Team** > **Workspaces**.

2. From the Workspaces page, click the **Name** of the workspace you want to work with.
3. From the category list for the workspace, click **Access**.

   The Access page appears, listing all the members currently added to the workspace.
4. Click the person's name.

   The category list and Properties page opens for the person, listing the person's name and contact information.



Adding a Workspace Member

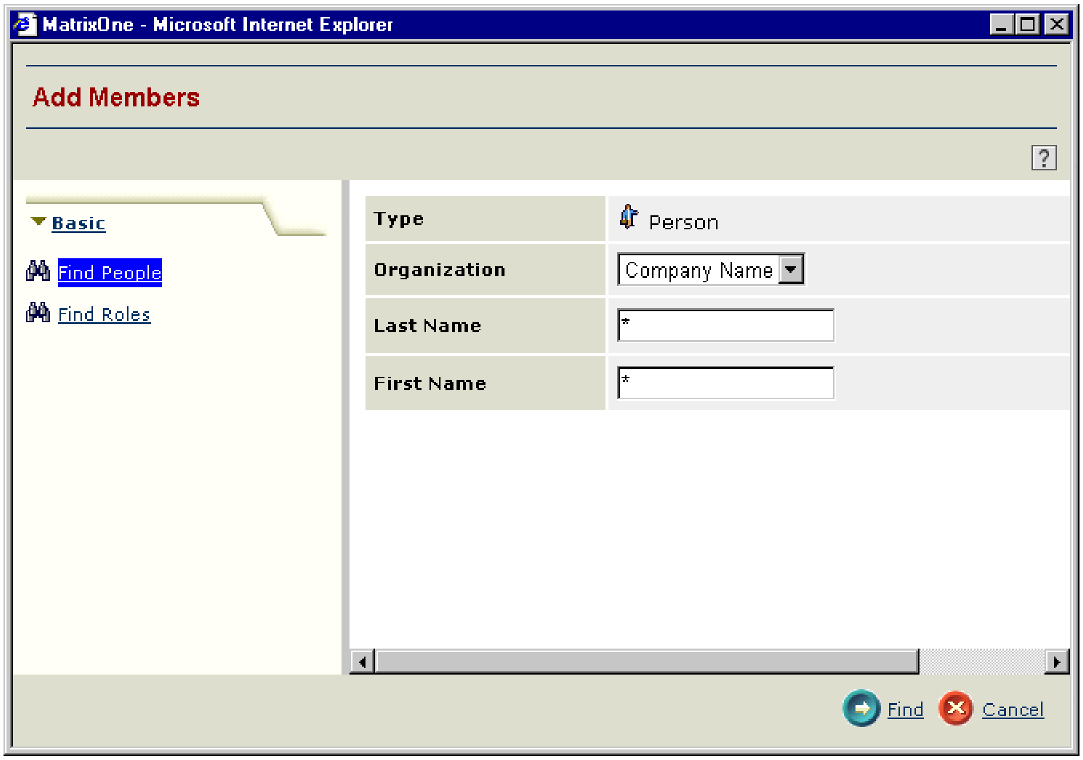
Typically, the workspace creator adds members when they create a workspace. Workspace Leads can then add additional members as needed at any time. This procedure describes how to add individual people and roles. When you add a role to the workspace, all people in the workspace creator's company who are assigned to the role will have access to the workspace.

To add people from a Buyer Desk, you need to associate the workspace with a Buyer Desk. See *Editing Workspace Details*.

To add a member to a workspace

1. Click **My Desk** > **Team** > **Workspaces**.
2. From the Workspaces page, click the **Name** of the workspace you want to work with.
3. From the category list for the workspace, click **Access**.
4. To add an individual person to the workspace:

a) From the Access page, click **Add Member(s)** from the page Actions menu.



b) From the Search page, enter search criteria to find the person you want to add:

Organization—To search based on the organization the person belongs to, choose the organization. Only the companies that your company is collaborating with are listed. If you search within your own company and your company has business units, the search includes employees of business units. If you don't want to search by organization, choose All Organizations.

Last Name, First Name—To search based on the person's name, enter the person's first and/or last name. If you enter part of the person's name, use the wildcard * to represent any number of characters. For example, to search for "Joseph Hue", you could enter "Hu*" in the Last Name box or "Jos*" in the First Name box. The search is case sensitive so use the correct capitalization. If you don't want to search by name, leave the * in the boxes.

c) Click **Find**.

d) From the Select Members page, check the person or persons you want to add.

e) Click **Done**.

The person is added to the Access page.

Removing a Workspace Member

The workspace owner and Workspace Leads can remove persons added individually and roles from a workspace. Removing a member prevents the member from accessing the workspace and any of its components. You cannot remove yourself, the current workspace owner, any member who belongs to or owns a route that is in process, or any member who owns a route template available to the workspace. For instructions on removing a person from a route, see the ***MatrixOne Common Components User Guide***.

The only way to remove a Buyer Desk person is to remove the person from the Buyer Desk through Sourcing Central or to remove the association between the workspace and Buyer Desk, which removes all Buyer Desk Persons. For instructions on removing the workspace association with a Buyer Desk, see ***Editing Workspace Details***. For instructions on removing a person from the Buyer Desk, see the ***Sourcing Central User Guide***.

Note these implications of removing a workspace member:

- If the person is a member of a route that has not been started, the task for the person is removed from the route. To prevent the task from being removed, reassign the task to another route member before removing the person from the workspace.
- If the person owns a route that has not been started, the workspace owner and Workspace Leads can still view the route but cannot change it or start it. They can save the route as a template though and create a new route based on the template. Since the route owner can no longer access the workspace, the route can never be started.
- If the person is the owner of a completed route, the other route members, workspace owner, and Workspace Leads can continue to view the route but the owner can no longer view it.
- If the person owns a folder, the workspace owner and Workspace Leads can still edit and manage the folder/ content.
- If the person owns a document, anyone with the appropriate access to the document can still work with it. For example, anyone with Write access can lock it for edit and anyone with remove access can remove it. Since only the document owner can edit its details and accesses, no one can make these changes for that version of the document. Anyone with Write access to the document can check in a new version, which makes that person the version owner, and then edit details and accesses as needed.

To remove a workspace member

1. Click **My Desk** > **Team** > **Workspaces**.
2. From the Workspaces page, click the **Name** of the workspace you want to work with.
3. From the category list for the workspace, click **Access**.
4. From the Access page, check the member you want to remove.

   You cannot remove Buyer Desk Persons, members who belong to a route, or the workspace owner.
5. Click **Remove Selected** from the page Actions menu.
6. At the confirmation message, click **OK**.

   The page updates and removes the selected members.

Defining a Member's Workspace and Default Accesses

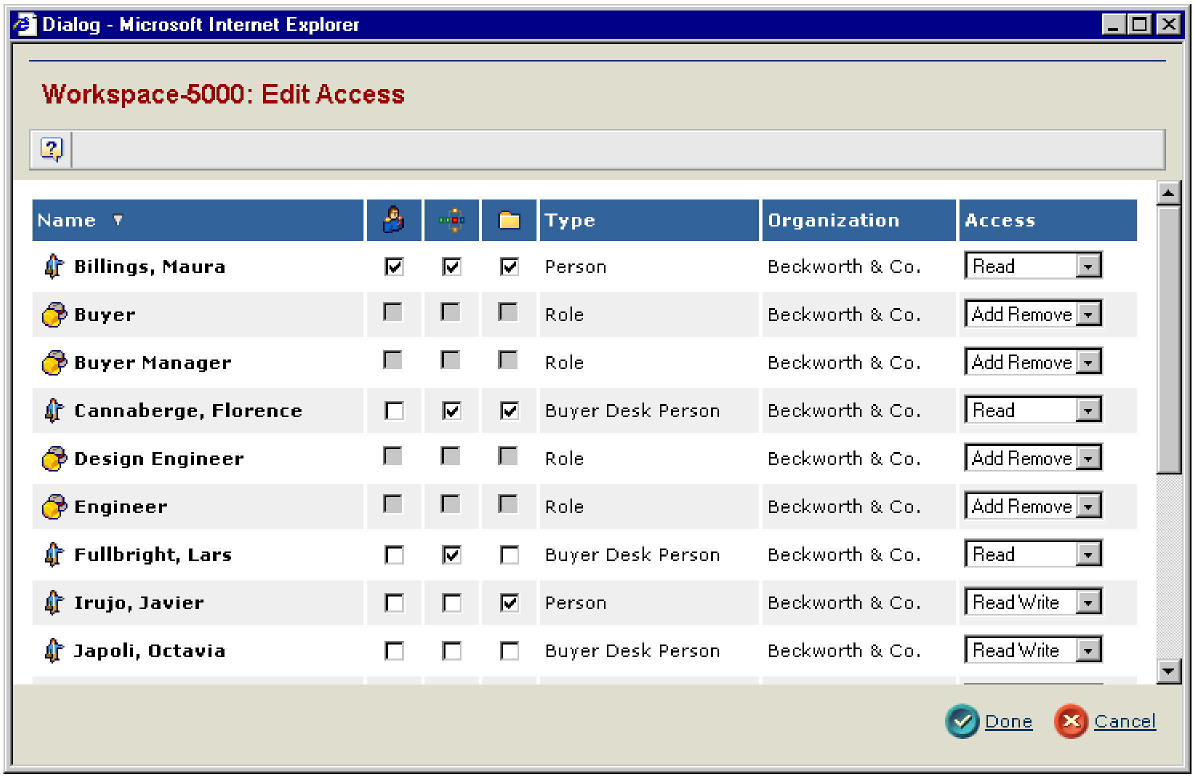
The workspace owner and people designated as a Workspace Lead for a workspace can change the Workspace Lead access, Create Route access, Create folder access, and default access level for any workspace member.

This section focuses on the steps for changing workspace accesses. For more information about what these accesses mean, see ***Workspace-Wide Default Access for Folders and Content***.

To edit the workspace and default folder accesses for a member

1. Click **My Desk** > **Team** > **Workspaces**.

2. From the Workspaces page, click the **Name** of the workspace you want to work with.
3. From the category list for the workspace, click **Access**.
4. From the Workspace Accesses page, click **Edit Access** from the page Actions menu. The Edit Access page opens.



5. To make a member a Workspace Lead or remove a member's Workspace Lead access, check/uncheck the **Workspace Lead** box for the member.

   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.
6. To give a member Create Route access or remove the access, check/uncheck the **Create Route** box for the member.

   Create Route access lets the person create routes for the workspace and for any folder the person has access to.
7. To give a member Create Folder access or remove the access, check/uncheck the **Create Folder** box for the member.

   Create Folder access lets the person create folders at any level in the workspace where the person has add or add/remove access for that level. When a person who is not the Workspace Lead creates a folder, the folder's access list is limited to inherited access only. A non-lead is not able to change the access list of a folder, and can only remove folders that s/he creates and has remove or add/remove access for.
8. To assign default workspace accesses, choose an access from the **Access** column.

A person’s default access is transferred to every folder, subfolder, and content item in the workspace but has no affect on other workspace components, such as routes, meetings, and discussions. The workspace owner and Workspace Leads can give a member higher accesses for individual folders and content but they cannot give the member a lower access than the default access. Basic access means that by default the person has no access by folders and content but Workspace Leads can give the person access on a folder by folder basis.

If you change a person’s default access level, the new access level replaces the existing inherited accesses throughout the folder, subfolder, and content hierarchy, and removes all additional accesses added at each level.

9. Click **Done**.

Workspace Templates

Use workspace templates to speed up the process of creating a workspace that is similar to one you have already created. A workspace template saves the components of a workspace that are frequently reused, including the:

- workspace description
- workspace members
- member access privileges
- folder structure

A workspace template can be designated as a User-level or Enterprise-level template. When a workspace is User-level, the only people who can see and edit it are the person who created it and Company Representatives who belong to the workspace and to the creator's company.

This section includes these topics:

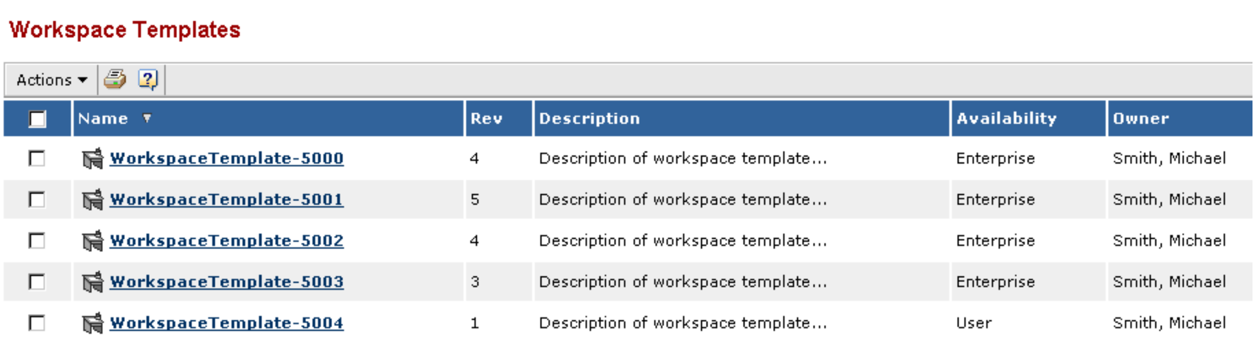
- *Listing Workspace Templates*
- *Viewing Information about a Workspace Template*
- *Saving a Workspace as a Template*
- *Listing Workspace Template Members*
- *Listing Previous Revisions of a Workspace Template*
- *Deleting a Workspace Template (Revision)*

Listing Workspace Templates

You can get a list of workspace templates that includes all workspace templates that you created and the Enterprise-level templates for all workspaces that you belong to. For Company Representatives, the list includes all User-level templates created for your workspaces by employees of your company.

To list workspace templates

1. Click **My Desk** > **Team** > **Workspace Templates**.


Workspace Templates

Actions

	Name	Rev	Description	Availability	Owner
	WorkspaceTemplate-5000	4	Description of workspace template...	Enterprise	Smith, Michael
	WorkspaceTemplate-5001	5	Description of workspace template...	Enterprise	Smith, Michael
	WorkspaceTemplate-5002	4	Description of workspace template...	Enterprise	Smith, Michael
	WorkspaceTemplate-5003	3	Description of workspace template...	Enterprise	Smith, Michael
	WorkspaceTemplate-5004	1	Description of workspace template...	User	Smith, Michael

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 information in the template.

Availability—User means the template is available only to you. Enterprise means the template is available to all workspace members.

Owner—The person who saved the template version.

2. To delete a template that you own, check it and click the **Actions** menu to select **Delete**. See the ***MatrixOne Common Components User Guide***.
3. To view details about a template, click its **Name**. See route templates in the ***MatrixOne Common Components User Guide***.

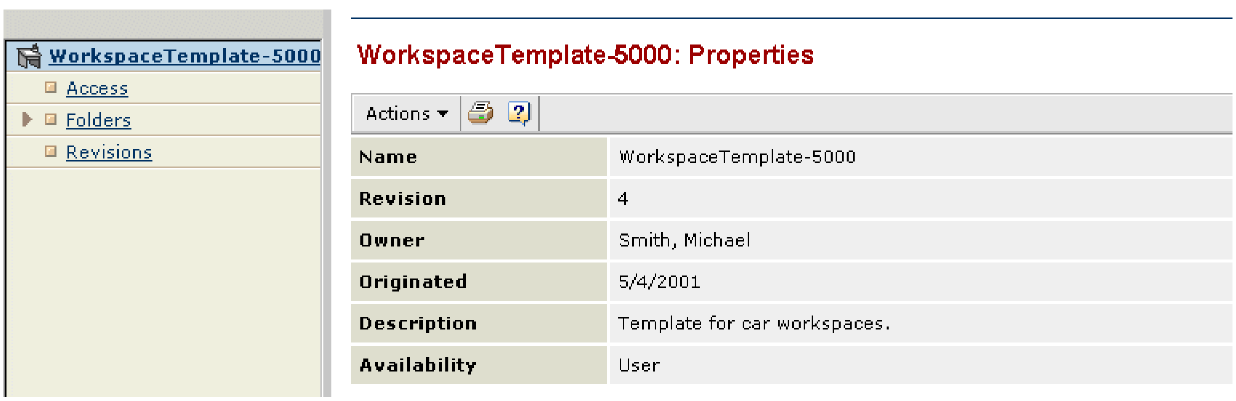
Viewing Information about a Workspace Template

You can view information about any workspace template that you created or that is an Enterprise-level template for a workspace you belong to. Company Representatives can also see user-level templates created by employees of their company.

To view information about a workspace template

1. Click **My Desk** > **Team** > **Workspace Templates**.
2. From the Workspace Templates page, click the **Name** of the template you want to view.

   The category list and Properties page for the template opens.



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. The page only shows the highest revision of each template.

Owner—The person who saved the template version.

Originated—The date the revision of the template was created.

Description—A summary of the information in the template.

Availability—User means the template is available only to you. Enterprise means the template is available to all workspace members.

3. To make changes to the workspace template attributes, click **Edit Details** from the page Actions menu. See ***Editing Workspace Template Details***.

Use the category list for the template to see more information:

Category	Description	For details, see:
Access	Lists the workspace members saved with the template and lets the template creator add and remove members.	***Listing Workspace Template Members***
Folders	Lists the folders and subfolders in the template and lets the creator edit the folder definitions.	***Listing and Editing Folders in a Workspace Template***
Revisions	Lists the previous revisions of the template and lets you view history for all revisions.	***Listing Previous Revisions of a Workspace Template***

Editing Workspace Template Details

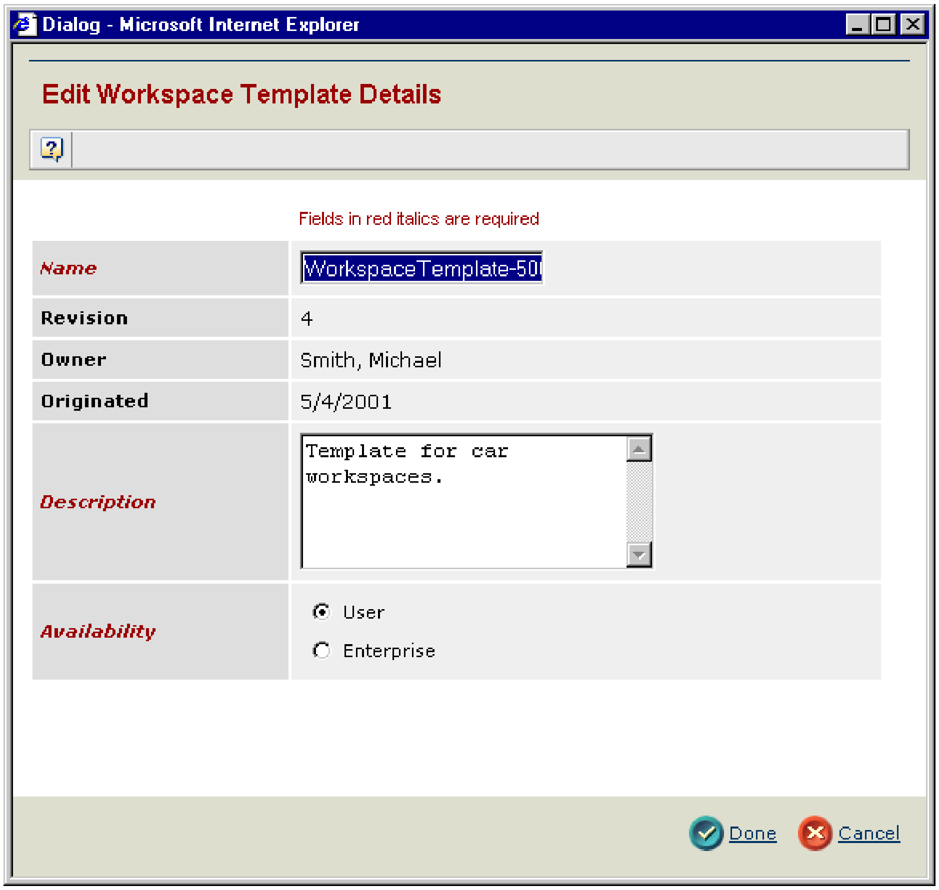
Only the owner of a workspace template can edit its name, description and availability. If you change the workspace template name, a new template is created, leaving the existing template unchanged. You can delete the old template from the Workspace Templates page. See the ***MatrixOne Common Components User Guide***.

To edit workspace template details

1. Click **My Desk** > **Team** > **Workspace Templates**.
2. From the Workspace Templates page, click the **Name** of the template you want to view.

   The category list and Properties page for the template opens.
3. From the Properties page, click **Edit Details** from the page Actions menu.

   The Edit Workspace Template Details page opens.



4. Edit the **Name** and **Description** as needed. If you change the workspace template name, a new template is created, leaving the existing template unchanged. You can delete the old template from the Workspace Templates page. See the ***MatrixOne Common Components User Guide***.

5. To change Availability, click either **User** or **Enterprise**. Enterprise-level templates are available to all workspace members and they can use them to create new workspaces with similar components. Workspace members cannot change Enterprise-level templates but can save them under a different template name.

The other information on the page is read only and cannot be changed after the workspace template is created. For details, see the ***MatrixOne Common Components User Guide***.

Saving a Workspace as a Template

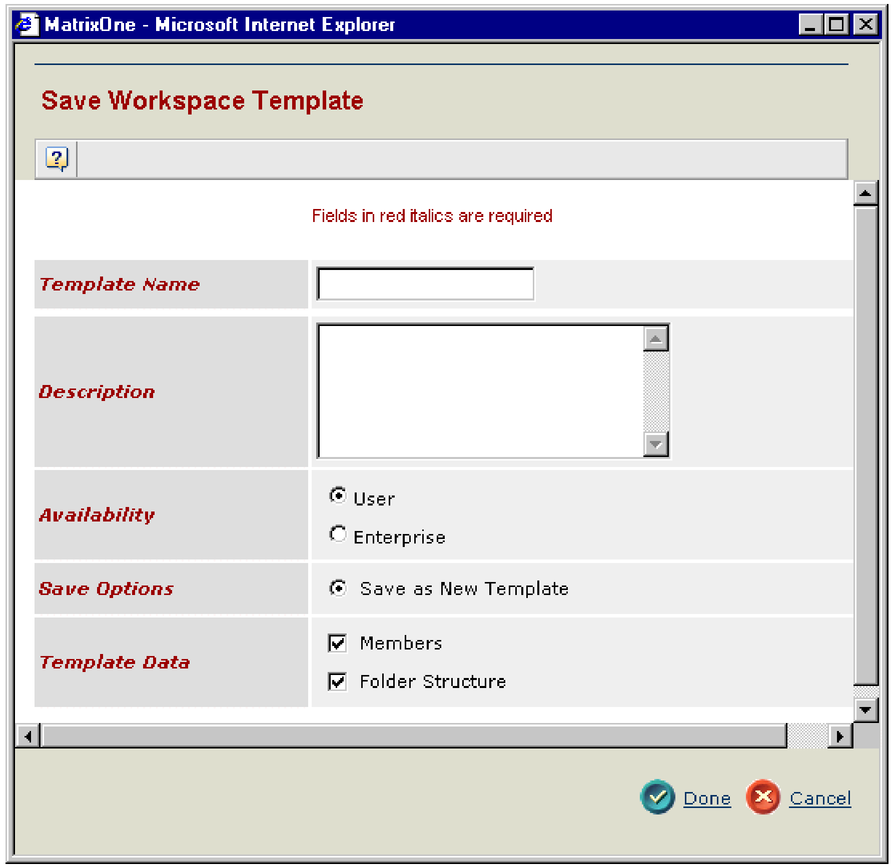
Use workspace templates to speed up the process of creating a workspace that is similar to one you have already created. A workspace template saves the components of a workspace that are frequently reused, including the workspace members and folder structure.

You can save any workspace as a template that you created. If you are designated as a Company Representative, you can make templates available to all members of the workspace, called Enterprise templates.

To save a workspace as a template

1. Access the workspace that you want to save as a template by clicking **My Desk** > **Team** > **Workspaces**. Then click the **Name** of the workspace.
2. From the Properties page, click **Save As Template** from the page Actions menu.

   The Save Workspace Template page opens.



3. On the Workspace Template page, enter a **Template Name** and **Description** for the template.
4. Choose the **Availability** for the template.

   User—The template is available only to you and from within the current workspace.

   Enterprise—This option is available only if you are designated as a Company Representative. Choose Enterprise if you want the template to be available to all workspace members.
5. If the workspace was already based on a template that you created, the page includes a **Save Option**. To save the workspace as a new template, choose **Save as New Template**. To save the workspace as a new revision of the template from which it was created, choose **Revise Template**.
6. Click **Members** and/or **Folder Structure** (or neither) to choose the **Template Data** you want included.
7. Click **Done**.

Listing Workspace Template Members

You can list the members included in any workspace template that you created or in any Enterprise-level template for a workspace you belong to. Company Representatives can also see user-level templates created by employees of their company.

To list members in a workspace template

1. Click **My Desk** > **Team** > **Workspace Templates**.
2. From the Workspace 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 default access levels are not saved with the template, the default access levels are not listed. For a description of the information shown, see the ***MatrixOne Common Components User Guide***.

Listing and Editing Folders in a Workspace Template

You can list the folders included in any workspace template that you created or in any Enterprise-level template for a workspace you belong to. Company Representatives can also see user-level templates created by employees of their company. Folders can be edited but only by creating a new revision of the template.

To list and edit folders in a workspace template

1. Click **My Desk** > **Team** > **Workspace Templates**.
2. From the Workspace Templates page, click the **Name** of the template you want to work with.
3. From the category list for the template, click **Folders.**

   The Folders page opens, listing all folders saved with the template. This is the same list that is shown for workspaces and the procedures for working with them are the same. For a description of the information shown, see ***Listing Folders in a Workspace***.
4. Edit the folders as you would the folders for a workspace. See ***Folders***.

Listing Previous Revisions of a Workspace Template

You can list previous revisions of any workspace template that you created or of any Enterprise-level template for a workspace you belong to. Company Representatives can also see user-level templates created by employees of their company.

To list previous revisions of a template

1. Click **My Desk** > **Team** > **Workspace Templates**.
2. From the Workspace 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.

WorkspaceTemplate-5000: Revisions

Actions

Name	Rev	Description	Availability	Owner
WorkspaceTemplate-5000	3	Workspace Template Description	Enterprise	Smith, Michael
WorkspaceTemplate-5000	2	Desc	Enterprise	Smith, Michael
WorkspaceTemplate-5000	1	Description of this Workspace Template	Enterprise	Smith, Michael

Name—The name assigned by the person who saved the template.

Rev—The revision number for the template. Each time a template is updated and saved, the system increments the revision number. The page only shows the highest revision of each template.

Description—A summary of the information in the template.

Availability—User means the template is available only to you. Enterprise means the template is available to all workspace members.

Owner—The person who saved the template version.

4. Click **Show History** from the page Actions menu to view the history of the workspace template. The history page shows the history for each revision starting with the most recent. For details, click the help link on the History page.
5. 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. See the ***MatrixOne Common Components User Guide***.

Deleting a Workspace Template (Revision)

You can only delete templates that you created. 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 workspace template

1. Click **My Desk** > **Team** > **Workspace Templates**.
2. From the Workspace Templates page, check the template(s) you want to delete.
3. Click **Delete** 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.

Folders

A ***folder*** is a set of documents that are related and that concern a particular workspace. Folders can have subfolders within them and you can add subfolders within subfolders. Typically, the workspace creator adds folders and subfolders when a workspace is created. As the workspace progresses, Workspace Leads can add and remove folders and subfolders as needed.

Depending on how your system is set up, you may also be able to add to folders documents from other Business applications and non-document kinds of items, such as quotations and Requests To Suppliers (RFQs) from Sourcing Central.

This section contains these topics:

- *Listing Folders in a Workspace*
- *Viewing Information for a Folder or Subfolder*
- *Creating a Folder or Subfolder*
- *Cloning a Folder or Subfolder's Structure*
- *Editing Details for a Folder or Subfolder*
- *Listing the Content of a Folder or Subfolder*
- *Understanding Folder and Subfolder Access*
- *Listing Accesses for a Folder or Subfolder*
- *Defining Access to Folders and Subfolders*
- *Assigning Global Read Access for a Folder*
- *Listing Subfolders in a Folder or Subfolder*
- *Listing Routes for a Folder or Subfolder*
- *Deleting a Folder*

Listing Folders in a Workspace

There are two methods to view a list of top-level folders in any workspace that you have Read access to:

- When you click a workspace name, the folder list appears in the upper section of the left frame (the Structure Navigator). You can click any folder name for quick access to the folder content, or click the plus (+) sign to access subfolders.
- When you click **Folder** from the category list for a workspace, the folder list appears in table format in the right frame. From this page, you can click a folder name to access folder content, create new folders, or delete existing folders.

To list all the folders in a workspace

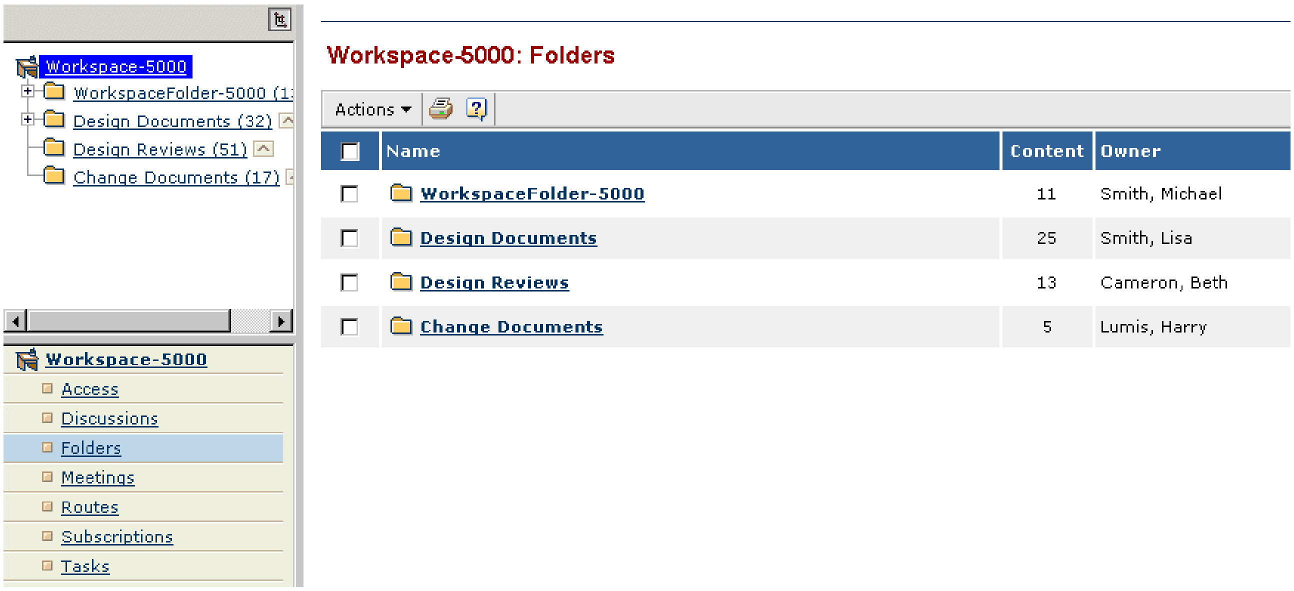
1. From the My View page, click the **Name** of the workspace.

   Or

   Click **My Desk** > **Team** > **Workspaces**. Then click the **Name** of the workspace.

   The category list and Properties page opens. Above the category list is a folder list, showing all folders for which you have Read access in the workspace. In parentheses next to the folder name is the number of items added to the folder and all of its subfolders.

2. You can also click **Folders** from the category list for the workspace, which shows the list of folders in table format in the right frame and provides links for those with access to create and delete folders.



For each folder, the page shows:

Name—The name of the folder. To get information about the folder, including its content and subfolders, click the Name.

Content—The number of items added to the folder and all of its subfolders combined.

Owner—The person who added the folder to the workspace.

3. Work with the folders as needed:
   - To list the contents of a folder, click its **Name**. See ***Listing the Content of a Folder or Subfolder***.
   - To add a new top-level folder, click **Create New** from the page Actions menu. (Workspace Leads and members with add or add/remove folder access only). See ***Creating a Folder or Subfolder***.
   - To delete a folder, from the Folders page, check it and click **Delete** from the page Actions menu. (Workspace Leads and members with remove or add/remove folder access only). See ***Deleting a Folder***.

Viewing Information for a Folder or Subfolder

Anyone with Read access to a folder or subfolder can view information about it, including its basic properties, content, subfolders, routes, and discussions. The category list and Properties page for a subfolder is exactly the same as the category list and Properties page for a folder.

To view information about a workspace folder or subfolder

1. From the My View page, click the **Name** of the workspace.

   Or

   Click **My Desk** > **Team** > **Workspaces** from the My Desk tab. Then click the **Name** of the workspace.

The workspace's category list and Properties page opens. Above the category list is a folder list, showing all folders contained in the workspace. This is a "quick access" method to see the content of a folder or subfolder.

Or

Click **Folders** in the category list to see the same content.

2. Click the name of the folder.

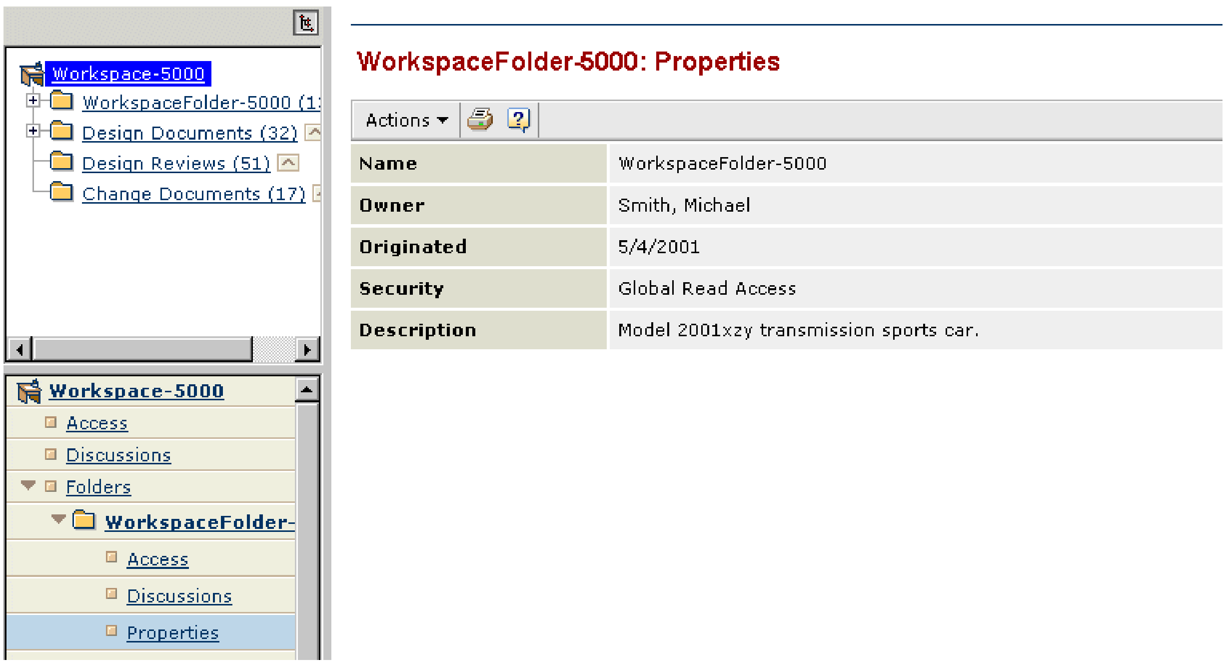
The folder's category list and Content page open.

To view information for a subfolder, in the folder list, click the plus sign (+) next to the folder you want to view subfolders for, and click the name of the subfolder.

Or

Click **Subfolders** from the folder's category list. Continue drilling down (clicking the subfolder's Name and then Subfolder from the subfolder's category list) until you see the category list and Content page for the subfolder you want to view information for.

3. From the folder's or subfolder's category list, click **Properties**.



Name—The name of the folder or subfolder.

Owner—The person who creates a folder or subfolder becomes the owner but that person can reassign ownership to another Workspace Lead or to the workspace owner. The owner should be the person with primary responsibility for the folder.

Originated—The date and time the folder was created.

Security—Your system may be configured so the folder Properties page also shows the folder Security. If the folder security is Global Read Access, then users from other MatrixOne applications can view content in the folder, even if they are not members of the workspace. If the security is Workspace Access, then Read access to the folder is required to view folder content. For more information about Global Read access, see ***Assigning Global Read Access for a Folder***.

Description—The intent or purpose of the folder, as entered by the folder owner.

4. Using the links at the top of the Properties page, work with the folder as needed:
   - To edit the properties listed, click **Edit Details** from the page Actions menu. See ***Editing Details for a Folder or Subfolder***.
   - To add folders and subfolders to the workspace by cloning the current folder/subfolder and any subfolders within it, click **Clone Structure** from the page Actions menu. Only Workspace Leads can add folders and subfolders. See ***Cloning a Folder or Subfolder's Structure***.
   - To subscribe to be notified when certain events occur for the folder or subfolder, click **Subscribe** from the page Actions menu. See ***Choosing Alert Events for a Folder or Subfolder***.
   - To have the system notify other workspace members when certain events occur for the folder or subfolder, click **Push Subscription(s)** from the page Actions menu. This is only available for the folder/subfolder owner. See ***Choosing Alert Events for Others***.

Creating a Folder or Subfolder

If the workspace creator used the Workspace Wizard to create the workspace, the creator probably created folders and subfolders for it. Workspace Leads and designated workspace members can create additional folders and subfolders as needed.

Another way to create folders and subfolders is to clone the structure of an existing folder/subfolder. See ***Cloning a Folder or Subfolder's Structure***.

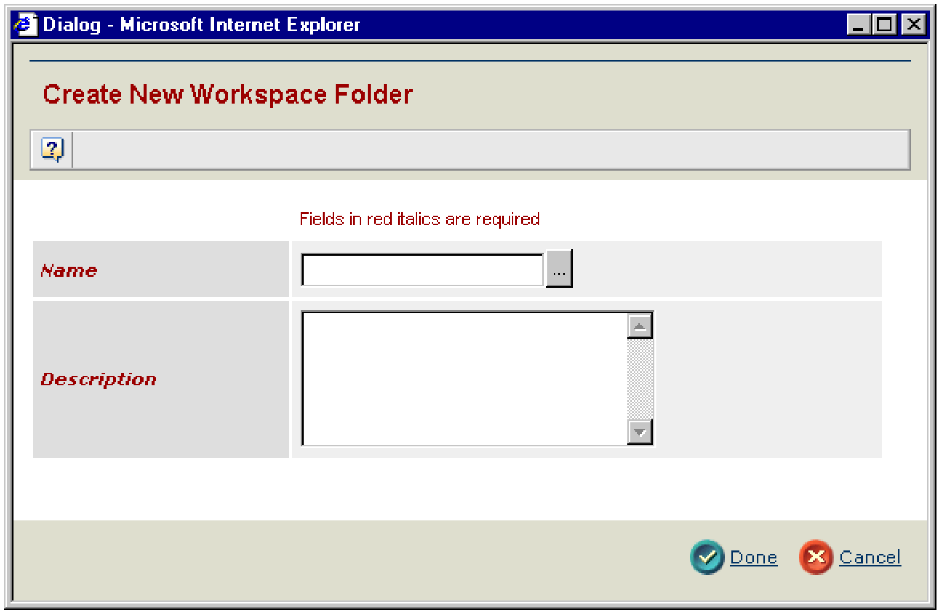
To create a folder or subfolder

1. Click **My Desk** > **Team** > **Workspaces**. Then click the **Name** of the workspace.
2. From the workspace category list, click **Folder**.

   The Folders page lists any folders that have already been created for the workspace.
3. To create a new top-level folder for the workspace, click **Create New** from the page Actions menu.

   To create a subfolder, click the folders **Name** from the Folders page. Then click **Subfolders** from the folder's category list. From the Subfolders page, click **Create New** from the page Actions menu.

   To create a subfolder within a subfolder, drill down to the Subfolders page that lists the subfolder you want to create a subfolder for. Click the **Name** of the subfolder, then click Subfolders from the subfolder's category list. From the Subfolders page, click **Create New** from the page Actions menu.



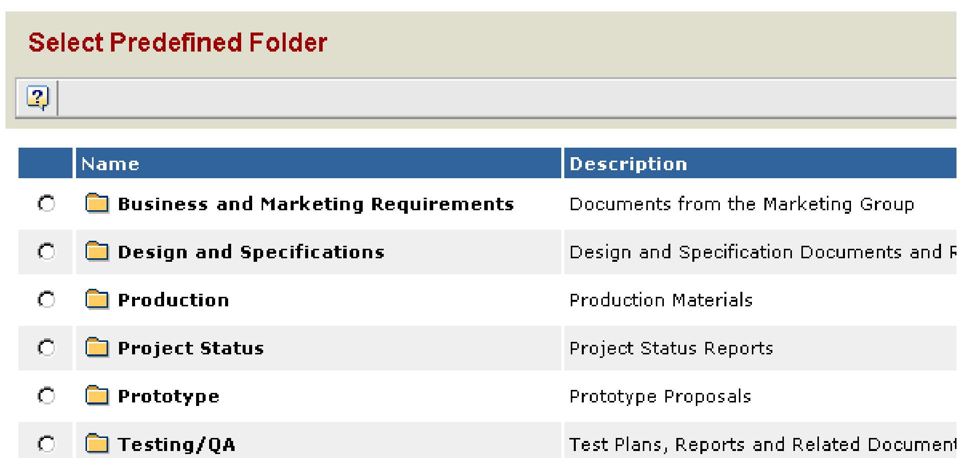
4. Enter a **Name** for the folder.

   This is the name you will use to track the folder so it should be short and descriptive. Top-level folders within a workspace cannot have the same name. Subfolders within a folder or subfolder also cannot have the same name. Subfolders can have the same name if they are within different folders/subfolders.

   Or for top-level folders:

   a) Choose the name of a predefined folder by clicking ... .

   If no folders have been predefined for your system or if all predefined folders have been added to the workspace, the Browse button is unavailable.



   b) Choose a predefined folder.

   c) Click **Done**.

5. Enter a **Description** for the folder to describe the folder’s intent or purpose. If you chose a predefined folder, you can edit the description.

6. Click **Done**.

   If you added a top-level folder, it inherits the default accesses set at the workspace level. If you added a subfolder, it inherits the accesses defined for its parent folder. You can add additional accesses as needed. See ***Defining Access to Folders and Subfolders***.

Cloning a Folder or Subfolder's Structure

Cloning a folder or subfolder creates a copy of the folder/subfolder and all levels of subfolders within it. The copied folder is added to the same folder level as the original cloned folder. Accesses for all folders and subfolders in the structure are also copied. Content, discussions, and routes are not copied. Only Workspace Leads can clone folders.

For example, suppose a workspace contains this folder structure:

- Folder A
- Folder B
  Subfolder B1
  Subfolder B2
  - Subfolder B2A
  - Subfolder B2B

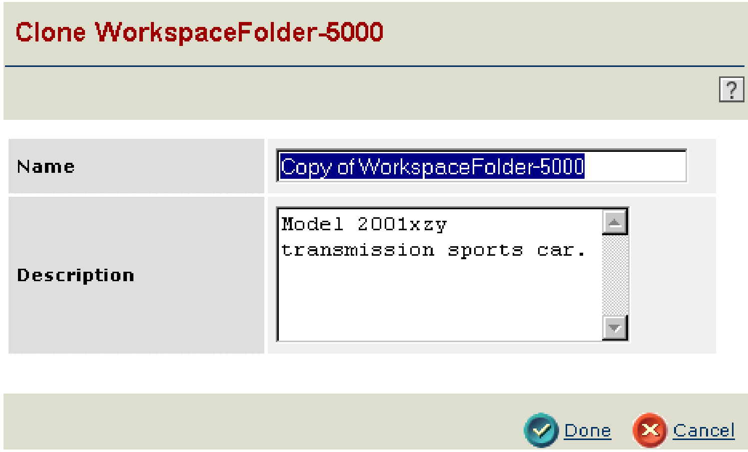
Cloning the structure of Folder B would result in this structure:

- Folder A
- Folder B
  Subfolder B1
  Subfolder B2
  - Subfolder B2A
  - Subfolder B2B
- Copy of Folder B
  Subfolder B1
  Subfolder B2
  - Subfolder B2A
  - Subfolder B2B

To clone the structure of a folder or subfolder

1. Access the category list and Properties page for the folder or subfolder. For details, see ***Viewing Information for a Folder or Subfolder***.
2. From the Properties page for the folder/subfolder that you want to clone, click **Clone Structure** from the page Actions menu.

   The Clone Workspace Folder page opens so you can enter a name and description for the new folder/subfolder. The system automatically enters the name of the cloned folder prefixed with "Copy of" and the description of the cloned folder.



3. Edit the **Name** and **Description** of the cloned folder as needed.
4. Click **Done**.

   The system creates the new folder/subfolder and all subfolders and accesses for it based on the cloned folder. The category list and Properties page for the highest folder/subfolder in the new structure is displayed.

Editing Details for a Folder or Subfolder

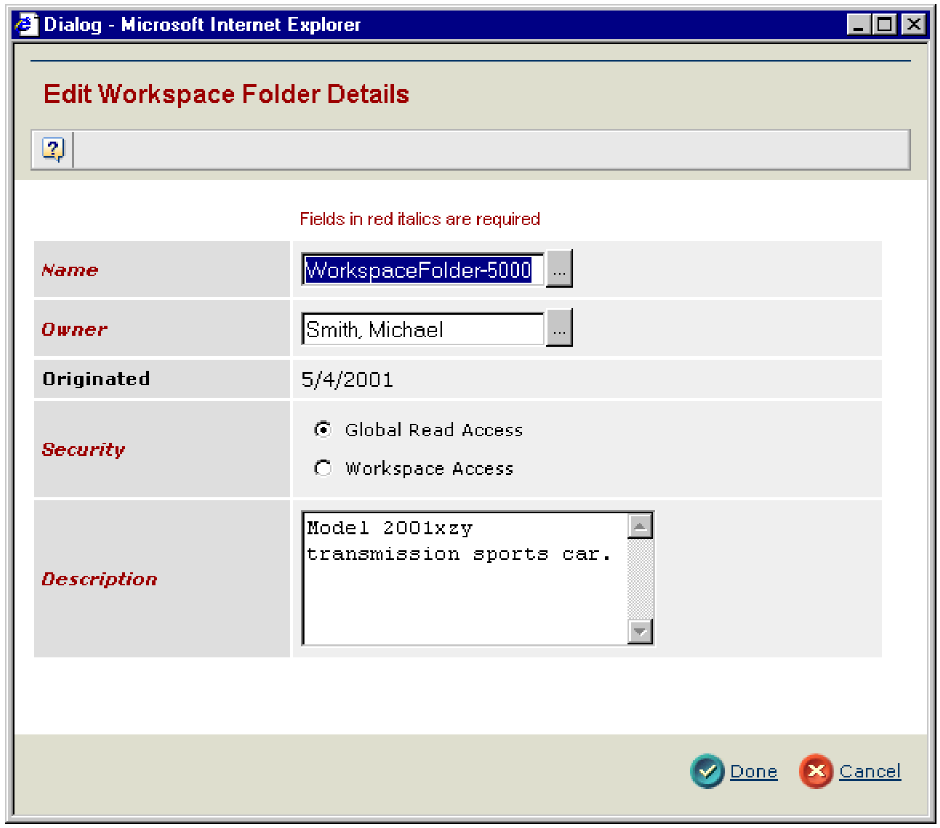
The owner of a folder or subfolder can edit its details, which includes changing the name and assigning ownership to another Workspace Lead.

If your system is configured to allow Global Read access for a folder, the Edit Folder Details page includes an option for choosing Global Read access. For instructions on assigning this access, see ***Assigning Global Read Access for a Folder***.

To edit details about a folder or subfolder

1. Access the category list and Properties page for the folder or subfolder. For details, see ***Viewing Information for a Folder or Subfolder***.
2. From the Properties page, click **Edit Details** from the page Actions menu.

   The Edit Folder Details page opens in a new window.



3. Edit the **Name** of the folder/subfolder as needed.

   This is the name you will use to track the folder so it should be short and descriptive. Top-level folders within a workspace cannot have the same name. Subfolders within a folder or subfolder also cannot have the same name. Subfolders can have the same name if they are within different folders/subfolders.

4. To make someone else the **Owner** of the folder/subfolder (be aware that if you make someone else the owner, you will no longer be the owner and therefore will not be able to change ownership again):

   a) Click  next to your name in the Owner field.

   b) From the list of Workspace Leads on the Select Folder Owner page, choose the new owner and click **Done**.

   The Edit Folder Details page refreshes to show the new owner instead of your name.

5. Choose whether the folder has **Global Read Access** or only **Workspace Access**.

6. Edit the **Description**, which describes the folder's intent or purpose, as needed.

7. Click **Done**.

Listing the Content of a Folder or Subfolder

Anyone with Read access to a folder or subfolder can list its content. A folder/subfolder can contain documents and, if your system is configured appropriately, 3D JT files. If your system also uses Sourcing Central, folders and subfolders can contain Requests to Suppliers (RFQs), packages, and quotations. If your system also uses Engineering Central, folders and subfolders can contain Parts.

Team Central contains a special feature that allows you to quickly see and work with the contents of a folder. When a workspace page is opened, the left frame contains the Structure Navigator, which shows a list of folders in a tree format. Clicking the plus sign next to any folder expands the tree to show the folder content and subfolders.

You can also use the Context Navigator, the traditional method of working with folders. Use this method when you want to see the category lists of multiple folders at the same time. For example, if you want to compare accesses, you can see several folders and their category lists at the same time. When using the Structure Navigator, the category list in the Context Navigator shows the current folder only. See the AEF Help for details on using the Structure Navigator.

To list the content of a folder or subfolder

1. From the My View page, click the **Name** of the workspace.

   Or

   Click **My Desk** > **Team** > **Workspaces**. Then click the **Name** of the workspace.

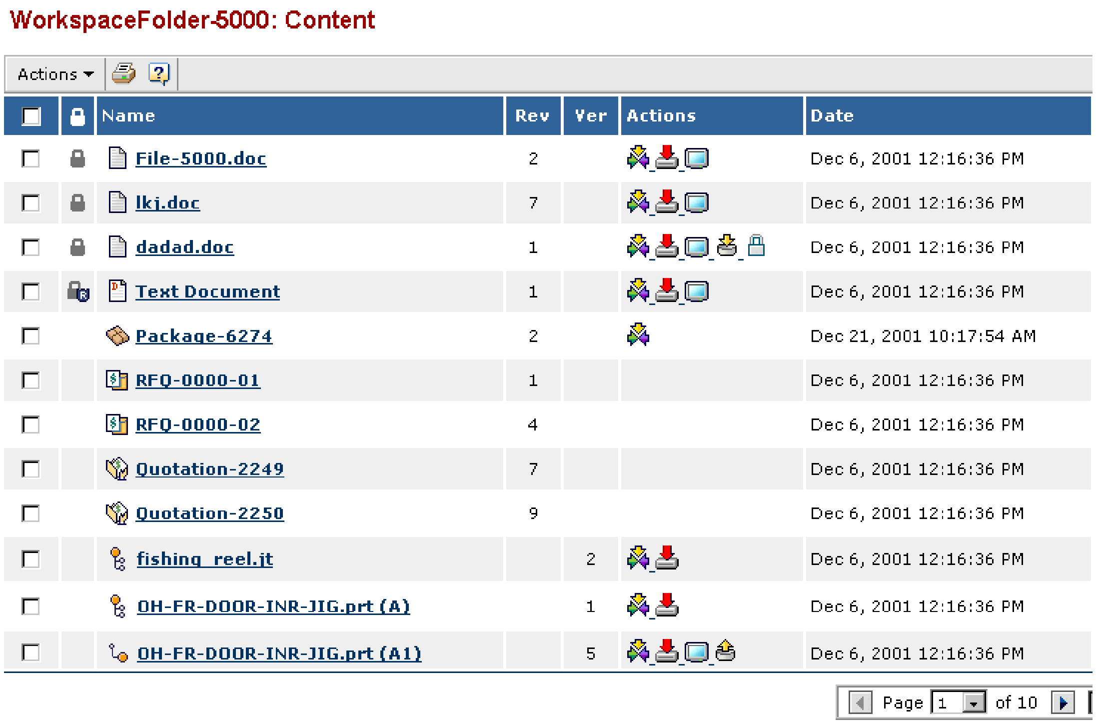
   The workspace's category list and Properties page opens. Above the category list is a folder list, showing all folders for which you have Read access in the workspace.

2. Click a folder name from the folders list.

   Or

   From the workspace category list, click **Folders** and from the Folders page, click the **Name** of the folder.

   The Content page opens, listing all content that has been added to the folder/subfolder. The page lists only the most recent version of documents and the most recent revision of non-document items.


WorkspaceFolder-5000: Content

Actions

		Name	Rev	Ver	Actions	Date
		File-5000.doc	2			Dec 6, 2001 12:16:36 PM
		lkj.doc	7			Dec 6, 2001 12:16:36 PM
		dadad.doc	1			Dec 6, 2001 12:16:36 PM
		Text Document	1			Dec 6, 2001 12:16:36 PM
		Package-6274	2			Dec 21, 2001 10:17:54 AM
		RFQ-0000-01	1			Dec 6, 2001 12:16:36 PM
		RFQ-0000-02	4			Dec 6, 2001 12:16:36 PM
		Quotation-2249	7			Dec 6, 2001 12:16:36 PM
		Quotation-2250	9			Dec 6, 2001 12:16:36 PM
		fishing_reel.jt		2		Dec 6, 2001 12:16:36 PM
		OH-FR-DOOR-INR-JIG.prt (A)		1		Dec 6, 2001 12:16:36 PM
		OH-FR-DOOR-INR-JIG.prt (A1)		5		Dec 6, 2001 12:16:36 PM

Page 1 of 10

For each item in the folder/subfolder, the page shows the:

Selection check box—The Folder Content page contains the standard check boxes in the left column, which let you select items to work on. If the item can't be removed, edited, or routed, the check box is gray and unavailable for checking. For example, if the item is locked for edit or if you only have Read access for the folder, the check box is gray. You can still view information about the item but you can't remove it from the folder, route it, or make changes to it.

Locked/Routed status—Shows any special conditions for the item. Documents can be 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. If the content item is included in a route, a lock and route icon is shown, indicating that the item cannot be included in another route or locked for edit from the folder. Route members with Write access to the document can edit the document through the route but not through the folder. (Your system may be set up so content can be included in multiple routes.)

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 root (top-level parent) JT files

for subassembly JT files

for component JT files with no other files under it for packages

for RFQs

for quotations

Rev—The revision number for the item, if the item is revisionable. Only non-document items have revision numbers. The Folder Content page lists only the latest revision of an item.

Ver—The version number for the document. Only documents have version numbers. 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.

Actions—The Actions column contains icons that let you work with the document content. These actions do not apply to non-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. For information about viewing and adding 3D documents, see ***3D JT Files***. 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.
- **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. For more information on downloading a file, see the ***Common Components User Guide***.
- **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, 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. See the ***Common Components User Guide***.
- **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. See the ***Common Components User Guide***.
- **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. See the ***Common Components User Guide***.
- **Subscribe** —Request to be notified when a specific event occurs for the document. See ***Choosing Alert Events for Folder Documents***.

Date—The date and time this revision or version of the item was added to the folder.

3. Work with the content as needed:
   - To get more information about an item, click its **Name**.
   - To add a document that has already been added to the system or a Sourcing Central item, click **Add Workspace Content** from the page Actions menu. See the ***Common Components User Guide***.
   - To add a file that is on your local disk and that has not been added to Team Central, click **Upload File(s)** from the page Actions menu. See the ***Common Components User Guide***.
   - To remove an item from the folder, check it and click **Remove** from the page Actions menu. See ***Removing an Item from a Folder***.
   - To route items in the folder, check them and click **Route** from the page Actions menu. The scope of the route is the folder/subfolder that contains the items. Depending on how your system is configured, this option may not be available for files that are locked for edit or for content that is already included in a route. See the ***MatrixOne Common Components User Guide***.
   - To move folder content to a different folder, check it and click **Move** from the page Actions menu. See ***Moving Content Between Folders***.
4. Use the category list to view more information about the folder:

Category	Description	For details, see:
Access	Lists the people who can access the folder and lets Workspace Leads define accesses to the folder.	***Listing Accesses for a Folder or Subfolder***
Discussions	Shows message threads created for the folder.	***Listing Discussions for an Item***
Properties	Shows basic information for the folder and provides links to edit, clone, subscribe, and push subscriptions.	***Viewing Information for a Folder or Subfolder***
Routes	Lists the active routes for the folder that you created or have a task for.	***Listing Routes for a Folder or Subfolder***
Subfolders	Lists the subfolders in the folder and lets you get information about the subfolders.	***Listing Subfolders in a Folder or Subfolder***

Understanding Folder and Subfolder Access

All top-level folders inherit the default accesses defined at the workspace level. For each folder, Workspace Leads can give additional accesses. For example, if a member’s default access is Basic, the person doesn’t have access to any folder by default. But a Workspace Lead can give the person access to any individual folder. For example, a Workspace Lead could let the member view a folder by assigning the member Read access to that folder. If a member’s default access is Read Write, a Workspace Lead could let the member add content to the folder by assigning the member Add access. The Workspace Lead can’t choose a lower access level than the member's default access, which is inherited by all folders.

Subfolders inherit all accesses from their parent folder. As long as the member has at least Read access to the parent folder, members can be given higher access levels but not lower. For example, suppose a member's default access is Basic and a Workspace Lead assigns the member Read access for a folder that has two subfolders: subfolder1 and subfolder2. The member inherits Read access for both subfolders and this access can't be removed. Now suppose the Workspace Lead gives the member Read Write access to subfolder1 and Add access to subfolder2. When the workspace owner creates a subfolder under subfolder1, the member inherits Read Write access to it. The member inherits Add access for subfolders under subfolder2. Again, a higher access can be assigned but not a lower access.

If your system is configured to allow Global Read access, you can assign Global Read access for a folder or subfolder. See ***Assigning Global Read Access for a Folder***.

All content inherits the accesses from the folder or subfolder it is in.

This list describes the specific actions allowed for each access level for a folder or subfolder. For more details about these accesses and instructions for configuring the accesses, see the Administrator's Guide.

- **None**—A person with None access to a folder or subfolder will not even see the folder/subfolder listed for the workspace. Such a person will not be able to view any item added to the folder (even if the item is included in a route they are in), participate in discussions about the folder's content, or be added to a route whose scope is the folder.
- **Read**—A person with Read access can view folder properties, participate in discussions for it, view accesses for the folder, and subscribe to be notified for events that occur for the folder. The person can be added to any route whose scope is the folder. Because all subfolders and document content inherit the person's access for the parent folder, a person with Read access for the folder can view all subfolders and document content for the folder.
- **Read Write**—A person with Read Write access to a folder can perform the tasks described for Read access. Write access applies only to editing content and therefore doesn't allow the person to perform any additional actions for the folder. Since all content inherits the folder access though, a person with Read Write access to the folder can edit all of its content.
- **Add**—A person with Add access to a folder can perform all Read and Write actions and can also add content to the folder.
- **Remove—**A person with Remove access to a folder can perform all Read and Write actions and can also remove items from the folder.
- **Add Remove—**A person with Add Remove access to a folder can perform all Add and Remove actions.

Listing Accesses for a Folder or Subfolder

Any workspace member with at least Read access to a folder can list the accesses for the folder. For help understanding how the accesses are inherited and added, see ***Understanding Folder and Subfolder Access***.

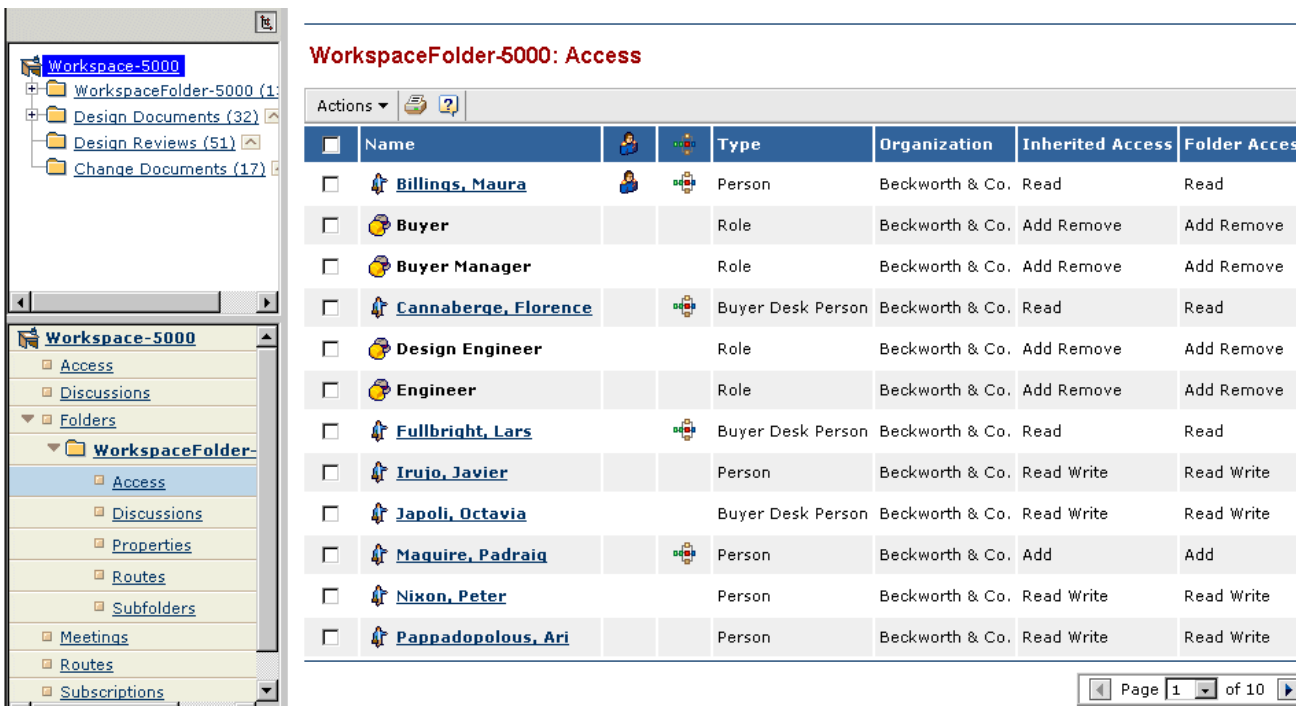
To list the workspace members who have access to a folder or subfolder

1. Access the category list and Properties page for the folder or subfolder. For details, see ***Viewing Information for a Folder or Subfolder***.

2. From the folder content page, click **Access** in the category list.

   The Folder Access page opens, listing all the workspace members and their access levels for the folder. Top-level folders inherit all default accesses set at the workspace level and subfolders inherit the accesses from their parent folder. These inherited accesses are listed in the Inherited Access column. Workspace Leads cannot change a person's inherited access. Workspace Leads define a higher access level for a member and remove accesses that have been added (those that are not inherited). Accesses that have been added for the folder and are not inherited are listed in the Access column.

   To filter the list so it shows only people added to the workspace individually, choose Persons from the list in the upper right corner. To filter the list so it shows only persons added to the workspace because they are assigned to an associated Buyer Desk, choose Buyer Desk Person. To filter the list so it only shows roles, choose Roles.



3. To give a member a higher access level than the inherited access or to change an added access, click **Edit Access** from the page Actions menu. This link is only available to Workspace Leads. See ***Defining Access to Folders and Subfolders***.

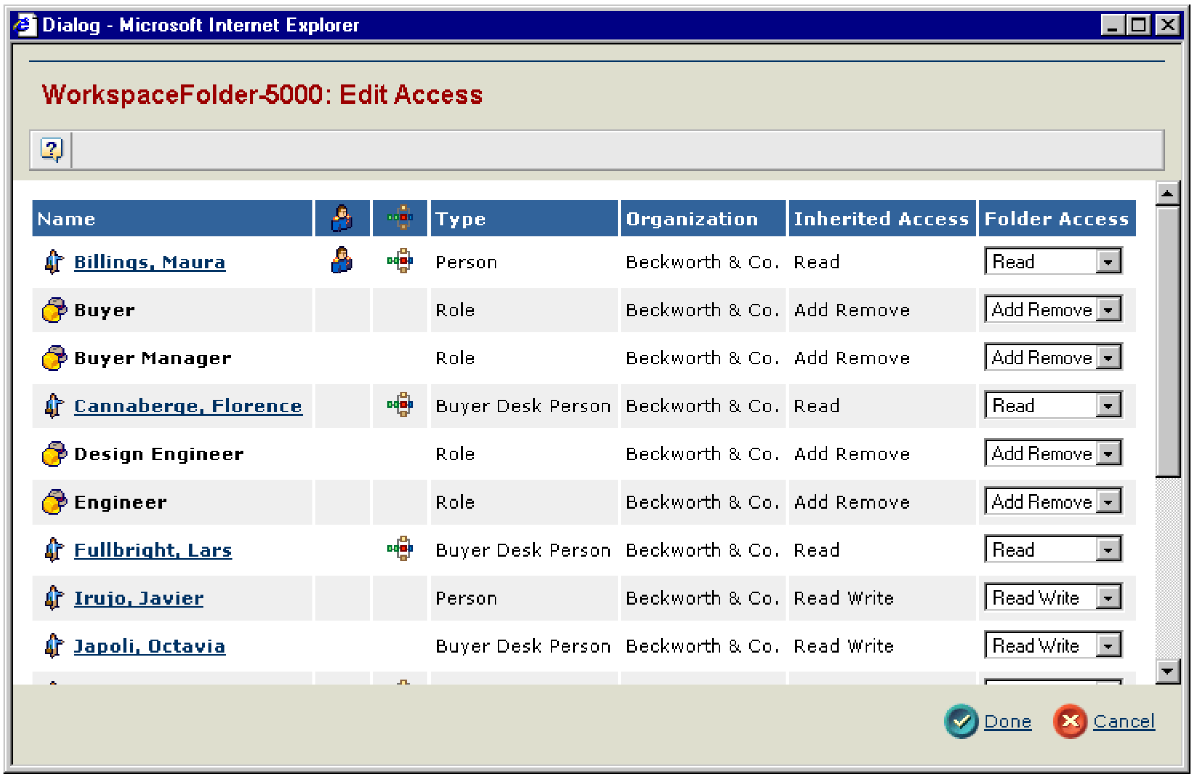
Defining Access to Folders and Subfolders

Only Workspace Leads can assign member access to folders. Assigning member access to a folder defines which members can view, add, remove, and work with the folder, its subfolders, and its content. All top-level folders inherit the default accesses defined at the workspace level and subfolders inherit the accesses defined for the parent folder. Similarly, content items inherit the accesses defined for the folder they are in. Document owners and Workspace Leads can add to these inherited accesses (as long as the owner inherits at least Read access from the parent folder) but they cannot remove them. Non-document content items, such as RFQs, inherit the folder access and this access cannot be increased per item. If you reset a person's access for a folder, that new access replaces all inherited accesses for the folder's subfolders and content and all additional accesses are removed.

This section focuses mainly on the steps for defining folder access. If your system is configured to allow Global Read access for folders, you can give Read folder access to all users, even if they are not members of the workspace. For instructions on assigning Global Read access to a folder, see ***Assigning Global Read Access for a Folder***.

To assign access permissions for a folder

1. Access the category list and Properties page for the folder or subfolder. For details, see ***Viewing Information for a Folder or Subfolder***.
2. From the category list for the folder or subfolder, click **Access**.
3. From the Folder Access page, click **Edit Access** from the page Actions menu.



4. From the Edit Access page, choose the access level each member should have for the folder. You cannot set an access that is lower than the inherited access.

The accesses you set for a folder define the minimum accesses for all of its subfolders and document content. Members can be given higher accesses for individual subfolders and documents but they cannot be given lower accesses. Accesses for a folder define the exact accesses for all non-document content. These accesses cannot be changed.

None—A person with None access to a folder or subfolder will not even see the folder/subfolder listed for the workspace. Such a person will not be able to view any item added to the folder (even if the item is included in a route they are in), participate in discussions about the folder's content, or be added to a route whose scope is the folder.

Read—A person with Read access can view folder properties, participate in discussions for it, view accesses for the folder, and subscribe to be notified for events that occur for the folder. The person can be added to any route whose scope is the folder. Because all subfolders and document content inherit the person's access for the parent folder, a person with Read access for the folder can view all subfolders and content for the folder.

Read Write—A person with Read Write access to a folder can perform the tasks described for Read access. Write access applies only to editing content and therefore doesn't allow the person to perform any additional actions for the folder. Since all content inherits the folder access though, a person with Read Write access to the folder can edit all of its content.

Add—A person with Add access to a folder can perform all Read and Write actions and can also add content to the folder.

Remove—A person with Remove access to a folder can perform all Read and Write actions and can also remove items from the folder.

Add Remove—A person with Add Remove access to a folder can perform all Add and Remove actions.

Assigning Global Read Access for a Folder

If your system is set up to allow Global Read access for folders, Workspace Leads can enable Global Read access for a folder or any of its subfolders. Global Read access should only be enabled for folders whose documents need to be viewed by people from within another MatrixOne applications, even if they are not workspace members. For example, when using Team Central in conjunction with the Sourcing Central, Global Read access should be given to folders that will be used to store standard content documents for RFQ templates. When these documents are added to RFQ templates and then to RFQs that are based on the templates, all buyers and suppliers who have access to the RFQ will be able to view the documents. Except for these very special cases, Global Read access should not be given.

Global Read access applies to all content within the folder or subfolder that is given the access and not to any subfolders under the folder. Note that Global Read access is for viewing files from other applications. Users within Team Central will still not be able to view files in Global Read folders unless they have Read access to the folder.

To assign Global Read access for a folder

1. Access the category list and Properties page for the folder or subfolder. For details, see ***Viewing Information for a Folder or Subfolder***.
2. From the Properties page, click **Edit Details** from the page Actions menu.
3. From the Edit Workspace Folder Details page, for **Security**, choose **Global Read Access**.

   To turn off Global Read access and have the system use standard accesses based on the folder's accesses, choose **Workspace Access**.
4. Click **Done**.

Listing Subfolders in a Folder or Subfolder

Anyone with Read access to a folder or subfolder can list its subfolders.

To list the subfolders within a folder or subfolder

1. From the My View page, click the Name of the workspace.

   Or

   Click **My Desk** > **Team** > **Workspaces**. Then click the Name of the workspace.

The workspace's category list and Properties page opens.

2. Click a folder name from the folders list.

   Or

   From the workspace category list, click **Folders** and from the Folders page, click the Name of the folder.

   The folder's category list and Properties page open.

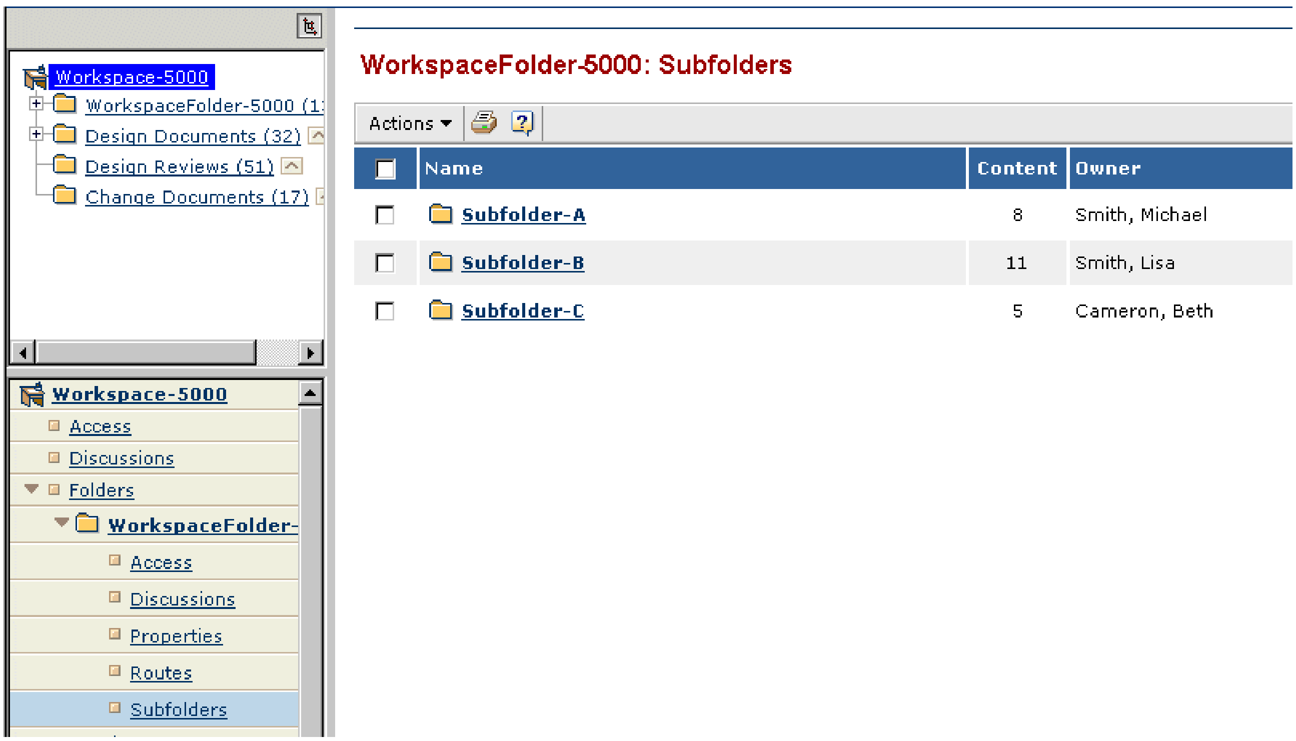
   To view subfolders for a subfolder, click the plus sign to expand the subfolder list in the Structure Navigator and click the Name of the subfolder.

   Or

   Click the folder's Name from the Folders page. Then click **Subfolders** from the folder's category list. Continue drilling down (clicking the subfolder's Name and then Subfolder from the subfolder's category list) until you see the category list and Properties page for the subfolder you want to view information for.

3. From the category list for the folder or subfolder, click **Subfolders**.

   The Subfolders page opens, listing all subfolders that has been added to the folder/subfolder.



   For each subfolder, the page shows:

   Name—The name of the subfolder. To get information about the subfolder, including its content and subfolders, click the Name.

   Content—The number of items added to the subfolder and all of its subfolders combined.

   Owner—The person who added the folder to the workspace.

4. Work with the subfolders as needed:

- To view the content of folder, click its Name. See ***Listing the Content of a Folder or Subfolder***.
- To add a new subfolder, click **Create New** from the page Actions menu (Workspace Leads only). See ***Creating a Folder or Subfolder***.
- To delete a subfolder, check it and click **Delete** from the page Actions menu (Workspace Leads only). See ***Deleting a Folder***.

Listing Routes for a Folder or Subfolder

To see a description of how routes work, see "Routes" in the ***Common Components User Guide***.

Deleting a Folder

Workspace Leads and designated workspace members can delete a folder or subfolder but only if it has no content, routes, or discussions. Subfolders within the folder/subfolder also cannot have content, routes, or discussions. This procedure describes how to delete both folders and subfolders.

To delete a folder or subfolder

1. From the My View page, click the Name of the workspace.

   Or

   Click **My Desk** > **Team** > **Workspaces**. Then click the Name of the workspace.

   The workspace's category list and Properties page opens.

2. From the workspace category list, click **Folder**.

3. To delete a folder:

   a) On the Folders page, check the folder.

   b) Click **Delete** from the page Actions menu.

   c) At the confirmation page, click **OK**.

4. To delete a subfolder:

   a) On the Folders page, click the Name of the folder that contains the subfolder.

   b) From the category list for the folder, click **Subfolder**.

   If the subfolder is a sub-subfolder, drill down through the subfolders by repeating Steps a and b until you have the Subfolders page that lists the subfolder you want to delete.

   c) From the Subfolders page, check the subfolder.

   d) Click **Delete** from the page Actions menu.

   e) At the confirmation page, click **OK**.

Moving Content Between Folders

Folder content can be moved within or across workspaces by users who have Remove access in the source folder and Add access in the destination folder. Files that are locked for edit and any item in a route cannot be moved until they are unlocked or removed from the route.

To move content between folders

1. Click the folder name to view its content.

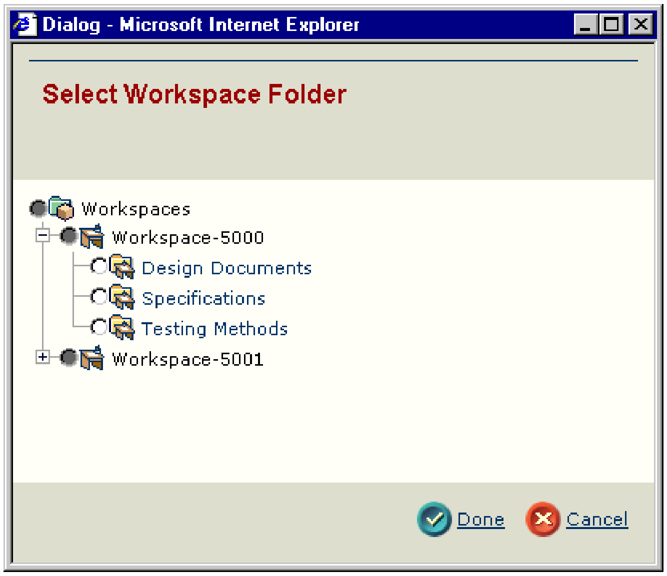
   For instructions on accessing the category list and Content page for a folder, see ***Viewing Information for a Folder or Subfolder***.

2. From the Content page, check the item(s) you want to move.

3. Click **Move** from the page Actions menu.

   If one or more selected documents are locked or in a route, you will receive an error message. Deselect the item(s) and click Move Selected again.

   The Select Workspace Folder page shows all folders for which you have Add access.



4. Select the folder where you want to put the items.

5. Click **Done**.

   Items are removed from the original folder and can now be found in the folder you selected.

Removing an Item from a Folder

The item owner and anyone with Remove access for a folder/subfolder can remove an item from the folder or subfolder. Files that are locked for edit and any item in a route cannot be removed until they are unlocked or removed from the route. When removing content from a folder or subfolder, you can choose between three options:

- remove all versions from the folder

  For example, if the current version is 3, no version of the document will remain in the folder.

- remove all versions from the folder and delete all versions from the database

  For example, if the current version is 3, no version will remain in the folder and versions 1, 2, and 3 are deleted from the database.

- delete only the most recent version and connect any discussions and subscriptions to the previous version

For example, if the current version is 3, it is deleted from the database but version 2 is still in the folder and all discussions and subscriptions are associated with version 2. This option is especially useful if you check in an updated version by accident.

You can only delete an item if you have Remove access for it and the item is not connected to another item, as listed in this table.

To delete this item from the database:	It cannot be connected to any other:
document	folder or subfolder item, such as an RFQ or package
package	folder or subfolder
RFQ	folder or subfolder package

Since quotations are always connected to an RFQ, they cannot be deleted from the database.

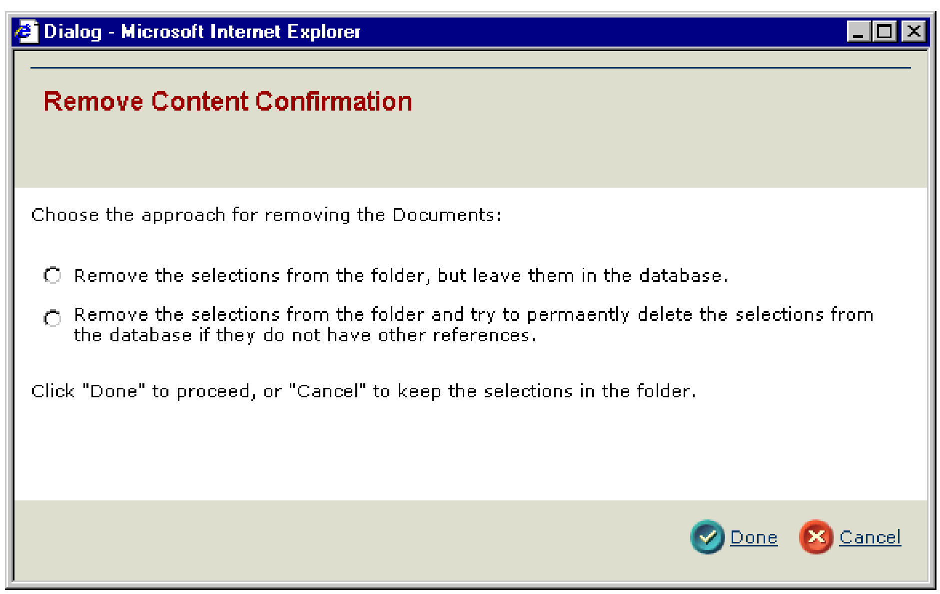
To remove an item from a folder

1. Click the folder name to view its content.

   For instructions on accessing the category list for a folder, see ***Viewing Information for a Folder or Subfolder***.

2. From the Content page, check the items you want to remove.

3. Click **Remove** from the page Actions menu.



4. Choose how to remove the item:

   To remove all versions of the item from the folder but keep the item in the database, choose **Remove the selections from the folder, but leave them in the database**. If the document is in no other folder, it becomes an unmanaged file.

To have the system attempt to also delete all versions of the item from the database, choose **Remove the selections from the folder and try to permanently delete...**. See the table at the top of this topic for the kinds of items the item cannot be connected to delete it.

5. Click **Done**.

   If you chose to remove the items only, the system removes them from the folder.

   If you chose to remove the items and delete them, the system attempts to delete them. If you do not have Remove access to one or more of the items, the entire process fails and no changes are made, including removals from the folder. If you still want to remove the items, you can repeat the above procedure and choose only to remove the items. If you have Remove access but one or more items could not be deleted because they are connected to other items, the system lists the items that could not be deleted.

3D JT Files

A 3D viewer lets people open drawing files that are saved in the .JT format and view the drawing in a 3D perspective. Using the 3D viewer, you can do some basic manipulation of the image, take some measurements, and mark up the drawing with comments and images. A .JT file is a rendered version of an original CAD file and is much smaller than the original.

If your system is set up for 3D viewing, people can add 3D JT files to folders and routes in Team Central and people with the appropriate access can view and mark up these files in the e-Vis Viewer or VisMockUp 3D viewer applications. Users can attach JT files to any route or folder that they have add access to. You can attach a single component JT file or a JT file that points to an assembly of other JT files. If you attach an assembly JT file, all the files that it points to in the assembly will also be added.

For instructions on registering 2D and 3D viewers, see the ***Application Exchange Framework Guide***. For instructions on setting up your system so users can check in 3D files, see the ***Administrator's Guide***. Your system may be set up so you can choose a preferred viewer for JT files from your profile page. See the ***MatrixOne Common Components User Guide***.

This section contains instructions for working with JT files. If your system is not set up for 3D viewing, then none of the options related to JT files, as described in the following sections, will be available.

- ***Installing the e-Vis Viewer***
- ***Adding a 3D Document***
- ***Viewing and Marking Up a 3D Document***
- ***Deleting JT Files***

Installing the e-Vis Viewer

If you have chosen the e-Vis viewer as your preferred viewer for JT files, you can download the installation program for the viewer from within Team Central. Choosing a preferred viewer must be configured by the host company and may not be available for your system.

To download the eVis viewer

1. Click **Tools** > **Edit Profile**.
2. From your Edit Profile page, click **Download eVisClient**.
3. From the File Download page, right-click **Choose Save Target As from the context menu** and choose **Save Target As**.
4. Save the file to your machine and run eVisClient.exe to install the viewer.

Adding a 3D Document

If your system is set up for 3D viewing, you can add 3D JT files to folders and routes. People with the appropriate access can view and mark up these files in the e-Vis or VisMockup viewer applications.

When adding a JT file, you can attach a single component JT file or one that is the root of an assembly of files. If you attach an assembly JT file, all the component files that it points to will also be added. If the root JT file points to JT files that in turn point to assembly files, then all these files are added and so on.

Unlike other documents in Team Central, you don’t add new versions of JT files by locking them for edit and then checking in new versions. The Lock for Edit and Checkin icons are not available for JT files. Instead, you add new versions of JT files by adding them as if you were adding the first version, by clicking on Upload External JT File. Then you’ll be given the option of creating a new version if the file already exists, as described below.

You can also maintain updates to JT files by saving markups in the VisMockUp viewer application. When you save a markup in this viewer, Team Central saves the markup with the document. Every person who views the JT file will be able to see all markups that have been added. For example, in VisMockUp, you save markups as layers and each layer file is saved along with the JT document. In e-Vis viewer, you save markups by capturing the image and saving the 2D image that shows your markups as a .CGM file. These CGM files are not added to Team Central but you can check them into the folder that contains the JT file.

Also unlike other documents, you cannot add a JT file to multiple workspace folders.

To add a 3D JT file to a folder or route

1. View the content of a folder or route: click the folder name from the folder list or click **Content** from the route’s category list.

   For instructions on accessing the category list for a folder, see ***Viewing Information for a Folder or Subfolder***. For instruction on accessing the category list for a route, see the ***MatrixOne Common Components User Guide***.

2. From the Content page, click **Upload External JT File**. (If this option isn’t available, then 3D viewing and upload hasn’t been set up for your system.)

   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 Team Central and click **Login**.

Do not use the standard Upload External File link for 3D JT files. If you do, the system will not recognize it as a JT file and will not open a 3D viewer when users attempt to view the file. The file also will not be converted to a binary file and will be very large.

3. If a security warning dialog appears, click **Yes**.

   The Upload External File page opens.

4. In the **File** box, type the full path for the file or click **Browse** to select the JT file.

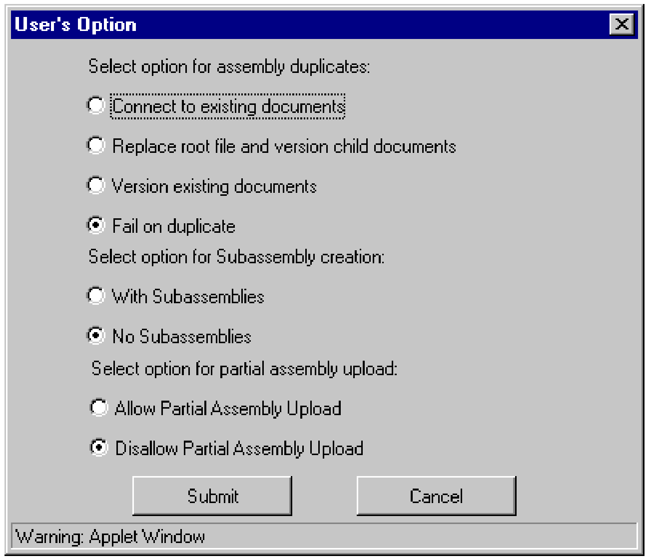
   File names cannot include any of these special characters: ; \ / ? < > + = : & @ $, * |.

5. In the Checkin Document page, enter a **Description** for the document.

6. If you are adding the JT file to a route, 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.

7. Click **JT FileCheckIn**.

A dialog appears, listing options for how you want the system to handle files that are already added with the same name and how you want the system to show the document structure.



8. Using the options at the top of the dialog, choose how you want the system to handle files that are already checked in with the same name as the ones you are adding, including the component files within assembly files. All three options apply to files being added that already exist in any folder for which you have Write access within the current workspace. Also if any of the files already exist in a folder to which you do not have Write access, then the upload fails and you will receive an error message.

Connect to existing documents—If the system finds existing files with the same name, it does not add the duplicate files or create new revisions. Instead it adds the files that are not duplicates and connects them to the existing files. The system makes the connections so the uploaded file structure is maintained. If the top level document already exists, then the upload fails with an error warning the user of the existence of the top level file.

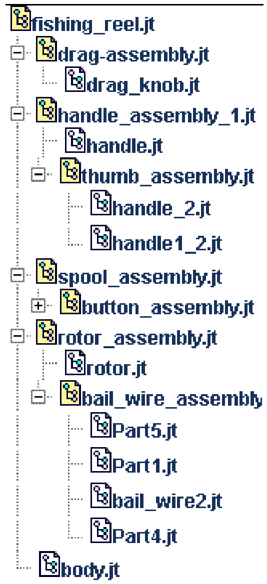
Replace root file and version child documents—If the system finds existing files with the same name, then the system adds the files and creates a new version. If the top level document exists in any folder, then it is replaced with the new file. Also the system creates all necessary connections to reflect the uploaded structure.

Version existing documents—If the system finds existing files with the same name, then the system adds the files and creates a new version. If the top level document exists in the folder being uploaded to, then it is versioned and the file is checked into the new version. If the top level does not exist in the folder but exists in another folder, then the upload fails. Also the system creates all necessary connections to reflect the uploaded structure.

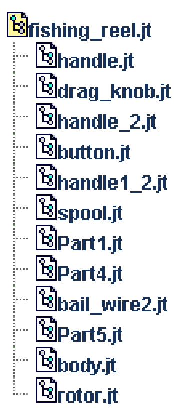
Fail on duplicate—If the system finds existing files with the same name, the upload fails.

9. Using the two options under Select option for subassembly creation, choose how you want the system to handle subassembly files within the JT file. If the JT file has no subassemblies, then these options do not apply.

With Subassemblies—Choose to have the system upload all subassembly and component files within the JT file. Users can view the entire subassembly structure, as shown below.



No Subassemblies—Choose to have the system upload only the component files within the JT file. No subassembly files are uploaded. When users view the structure of the files, the system will show the root JT file and all component files directly under it, regardless of where they are actually located within the subassembly structure, as shown below.



10. Using the options under Select option for partial assembly upload, choose how you want the system to handle an assembly that is missing one or more component or subassembly files:

    Allow Partial Assembly Upload—Choose this option to have the system upload an assembly even if it is missing one or more files.

    Disallow Partial Assembly Upload—Choose this option if you want the upload to fail if the assembly is missing one or more files.

11. Click **Submit**.

    The file is copied from the local directory to the folder. If the JT file is the root of an assembly, all component files in the assembly are also added. Subassemblies are added if you chose With Subassemblies.

12. At the confirmation message, click **OK**.

Viewing and Marking Up a 3D Document

This procedure describes how to view a 3D JT document that has been added to a folder or route in Team Central. The procedure also includes instructions for viewing the structure of an assembly JT file and marking up the file (VisMockUp only). To view a JT file, you must have at least Read access to the file. To mark up a JT file, you must have Read Write access to it. You can only perform this procedure if your system has been set up for 3D viewing and you have a supported 3D viewer installed, such as e-Vis Viewer or VisMockUp.

If your system has been set up to use more than one 3D viewer for JT files, you must choose the viewer you prefer to use. See the ***MatrixOne Common Components User Guide***. If you have the option of choosing a preferred viewer and don't select one, the system won't launch any viewer when you attempt to view a JT file.

Depending on how your system is set up, a File Checkin/Checkout Login page may appear when you attempt to view or add documents. If so, enter the same Username and Password that you enter when logging into Team Central and click Login.

To view a 3D JT document that has been added to a folder or route

1. View the content of a folder or route: click the folder name from the folder list or click **Content** from the route's category list.

   For instructions on accessing the category list for a folder, see ***Viewing Information for a Folder or Subfolder***. For instruction on accessing the category list for a route, see the ***MatrixOne Common Components User Guide***.

   The Content page lists all items in the folder or route, including JT files. The icon next to each JT file shows whether the file is the root assembly file , a subassembly file , or a component file with no files under it .

2. To view information about a JT file, including the structure of its subassemblies and component files:

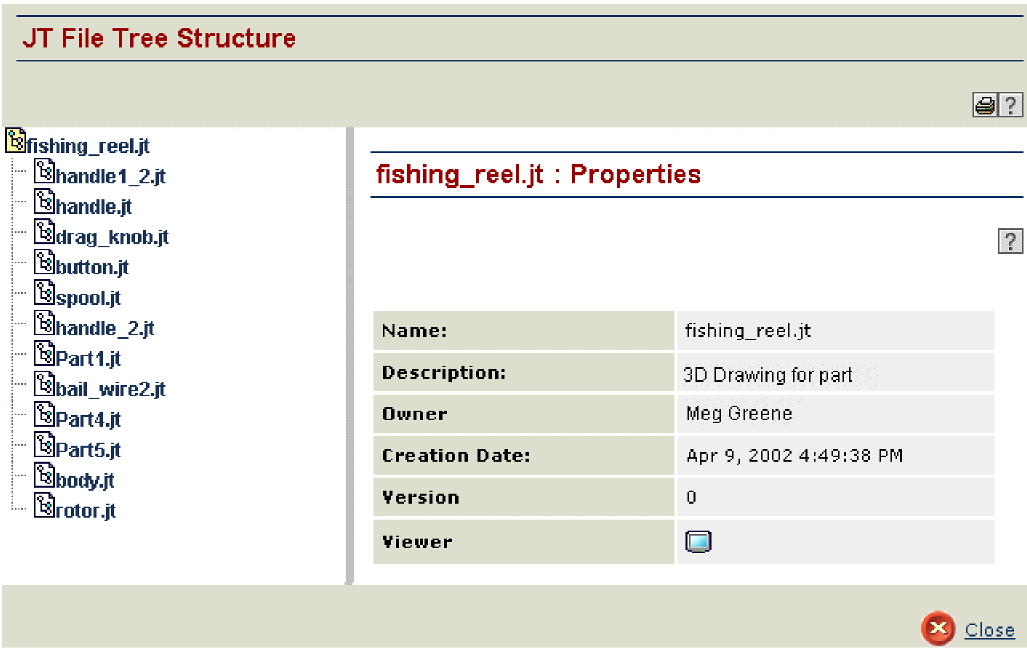
   a) Click the file's **Name** from the Content page.

   The category list and Properties page opens for the JT file.

b) Use the category list to view more information about the JT file, as you would any document.

c) To view the structure of the JT file, click **View Structure** from the Properties page.

The JT File Tree Structure page opens. The page shows the file structure on the left and details for the selected file on the right. If the JT file has no component files, no other files are listed on the left. If the JT file contains subassemblies and the subassemblies were added along with the root file, subassemblies are shown. Click the plus and minus icons to expand and contract the subassemblies. To view details about any file within the structure, click the file name. To view the selected file in the 3D viewer, click the **View** in the lower right corner of the window. See Step 3 below for more details.



3. To view a JT file in the e-Vis or VisMockUp viewer:

a) Click the **View** icon for the file from the Content page for the folder or route.

The Viewer popup window opens and a configured JT viewer launches and opens the JT file. If the JT file has child subassemblies or component files, they are also available. If the file has markups attached (VisMockUp viewer only), they are also opened. For instructions on viewing markups, see the documentation that accompanies the viewer.

b) Work with the file as needed. See the viewer's documentation for specific instructions.

c) You can switch back to Team Central and view another JT file if needed. The system will open another Viewer popup window and the second JT file will open in the Viewer application.

4. To mark up a JT file in VisMockUp:

a) View the JT file in VisMockUp as described in Step 3.

b) Use the viewer's markup tool to add text and/or line art.

c) Save the markup by saving the layers. Each layer file is saved along with the JT document.

Any markups that you save in VisMockUp will be attached to the drawing and available to anyone who subsequently views the drawing from Team Central.

In e-Vis Viewer, you save markups by capturing the image and saving the 2D image that shows your markups as a .CGM file. The 2D CGM file that you save in e-Vis is not saved with the JT file in Team Central. You can add it to the folder that contains the JT file using the standard file checkin.

Deleting JT Files

Like standard files, you must have Remove access for a folder to remove JT files from it and you cannot delete a JT file if it is connected to other items. For more information on the guidelines for removing files, see ***Removing an Item from a Folder***.

You cannot delete a child file until you first delete the assembly file that contains it and you cannot delete a subassembly without first deleting the parent assembly file that contains it. If you attempt to delete a file that cannot be deleted because its parent assembly file has not been deleted, the system does not delete the file and presents a message that tells you the file isn't deleted. If you selected some files that could be deleted, the system does delete them. Unless you know the file structure, you will have to select files that may not be able to be deleted and repeat the delete procedure until all the files you want to delete are removed.

For example, suppose you want to delete all files within a structure that has several levels of subassembly files. You must first delete the parent assembly file, as indicated by a icon next to the file. Then you must delete all subassembly files, as indicated by a icon next to the files. The system will only delete the highest level subassembly files. The lower level subassemblies remain. Note that the system does not distinguish between levels of subassembly files so you can't tell which subassemblies can be deleted unless you know the structure. After deleting these highest subassembly files, you must delete the next level of subassembly files by choosing all the remaining files with icons. Repeat this until you are left only with child files, as indicated by a . icon. Then you can delete the child files.

Alternatively, if you don't want to pay close attention to the icons, you could simply select all JT files for deletion. The system will delete only the highest level subassemblies. Then you can keep repeating the process, deleting only the highest level subassemblies each time, until you delete all the files.

If you uploaded the assembly without including subassemblies, then the procedure is much simpler. You need only delete the root assembly file and then you can delete all the component child files.

To delete a 3D JT document that has been added to a folder

1. View the content of a folder or route: click the folder name from the folder list or click **Content** from the route's category list.

   For instructions on accessing the category list for a folder, see ***Viewing Information for a Folder or Subfolder***.

2. On the Content page, check the JT files that you want to delete. For help determining which files to choose first, see the explanation at the beginning of this topic.

3. Click **Remove Selected** from the page Actions menu.
4. From the Remove Content Confirmation, choose the second option: **Remove the selections from the folder and try to permanently delete...**

   You must completely delete the files and not just removed them from the folder.
5. Click **OK.**

   If you receive a message that says some files could not be deleted because they have references to other files, then these files are part of an assembly and the system did not delete them.
6. If there are additional JT files that you want to delete but could not delete previously because they were part of an assembly that you deleted in the previous steps, repeat steps 2 through 5 until all JT files that you want to delete are deleted.

Subscriptions

This section contains these topics:

Subscription Overview

Subscribing means to indicate that you want to be notified whenever a specific event is performed for a workspace or workspace component. For example, you could request to be notified whenever someone locks a file for editing or checks in a new version of the file.

The application sends the notifications to the email address entered for your profile and to your IconMail inbox. The following table lists the events you can subscribe to for workspaces and workspace components.

Items you can subscribe to:	Events you can be notified about for each item:
workspaces	member added member removed route completed route started folder content modified folder/subfolder created folder/subfolder deleted
routes	content added (not including updated versions of existing files) content removed task completed
folders and subfolders	content added (not including updated versions) content removed folder created folder deleted
files	file locked for edit (file check out) updated version checked in (file check in)

Items you can subscribe to:	Events you can be notified about for each item:
discussions	new discussion (top-level message)
individual messages in a discussion	new reply

For more information about these events and instructions on how to subscribe to events for a particular kind of workspace component, see:

- *Choosing Alert Events for a Workspace*
- *Choosing Alert Events for a Route*
- *Choosing Alert Events for a Folder or Subfolder*
- *Choosing Alert Events for Folder Documents*
- *Choosing Alert Events for an Item's Discussions*
- *Choosing Alert Events for Individual Discussion Messages*

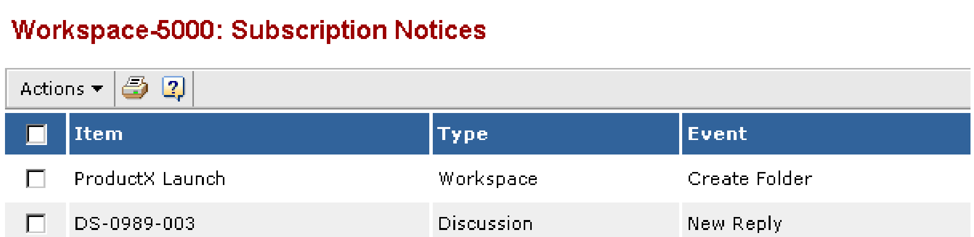
Viewing Your Subscriptions

You can list all events that you have subscribed to for a workspace.

To see all your subscriptions within a workspace

1. Click **My Desk** > **Team** > **Workspaces**.
2. From the Workspaces page, click the **Name** of the workspace.
3. From the workspace category list, click **Subscriptions**.

   The Subscription Notice page opens, listing all the events you are currently subscribed to for the workspace. This list does not included subscriptions that another person has selected for you ("pushed" subscriptions).


Workspace-5000: Subscription Notices

Actions

	Item	Type	Event
☐	ProductX Launch	Workspace	Create Folder
☐	DS-0989-003	Discussion	New Reply

   Item—The name of the item you are subscribed to.

   Type—A workspace or workspace component, such as folder, route, discussion.

   Event—The event for which you are notified. To see a list of all events for each item type, see *Subscriptions*.

4. To unsubscribe to an event, uncheck it and click **Remove** from the page Actions menu.

Choosing Alert Events for Others

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. For example, the owner of a workspace can have the system notify specific members whenever a route is started. These pushed subscriptions are added to the subscriptions the members have chosen for themselves. This means that it is possible for a person to receive two notifications when an event occurs for an item: one for a subscription the recipient initiated and another for a subscription that was “pushed” from the item’s owner. The recipient of the notifications can distinguish between the two notifications though because pushed notifications indicate who initiated the subscription and that the subscription was pushed.

The option to push subscriptions is available to for all workspace items that can be subscribed to (workspace, folders, routes, documents in folders, etc.) except Sourcing Central content, such as RFQs, packages, and quotations. Push subscriptions is available only for the owner of an item. The item owner can push subscriptions for any event that they can normally subscribe to for that type of item. Members cannot remove a subscription that has been pushed to them.

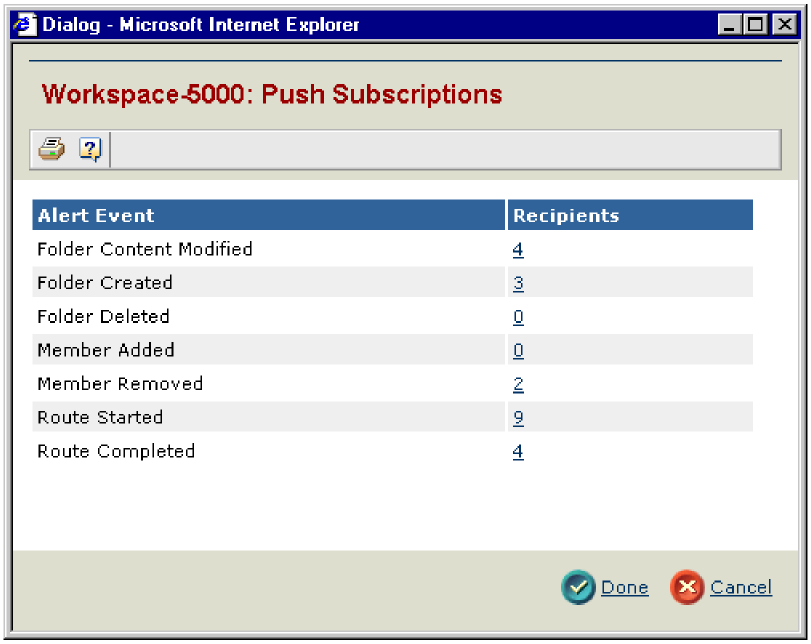
These instructions contain general steps for pushing subscriptions for any item. For specific instructions on accessing the page that contains the Push Subscription option or for information on the events that you can subscribe to for each type of item, see:

- ***Choosing Alert Events for a Workspace***
- ***Choosing Alert Events for a Route***
- ***Choosing Alert Events for a Folder or Subfolder***
- ***Choosing Alert Events for Folder Documents***
- ***Choosing Alert Events for an Item’s Discussions***
- ***Choosing Alert Events for Individual Discussion Messages***

To push subscriptions to other members

1. Go to the page that contains the standard Subscribe option for the item. You must own the item. Subscribe options are on the Properties page for all items except for individual messages. The Subscribe option for individual messages within a discussion are on the page that lists the discussion’s messages.
2. Click **Push Subscriptions**.

   The Push Subscriptions 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 workspace.



3. For each event that you want the system to notify other people for:
   a) Click the linked number in the **Recipients** column.
   b) From the Edit Push Subscription Recipients page, click **Add Recipients** from the page Actions menu.
   c) From the Select Push Subscription Recipients page, select one or more recipients and click **Done**.

      The system only finds people who have at least read access to the item.
   d) From the list of results, check the people you want to push the subscription to and click **Done**.
4. To prevent the system from sending notifications to people:
   a) Click the number in the **Recipients** column.
   b) Check the people.
   c) Click **Remove Selected** from the page Actions menu.
5. Click **Done**.

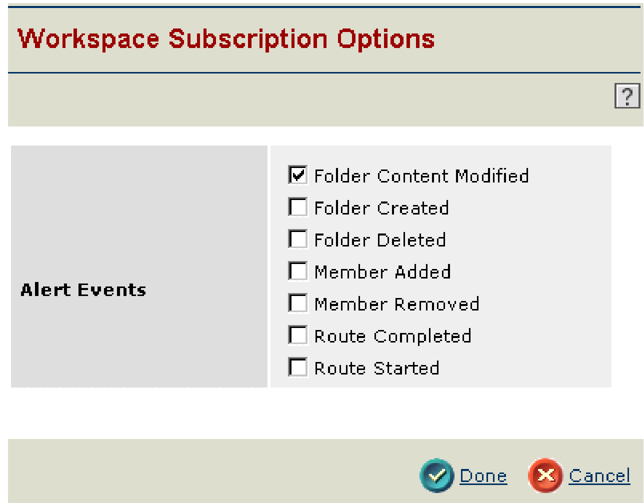
Choosing Alert Events for a Workspace

You can choose to be notified when specific events occur for any workspace of which you are a member.

To choose notification events for a workspace

1. Click **My Desk** > **Team** > **Workspaces**.
2. From the Workspaces page, click the **Name** of the workspace.
3. From the Properties page for the workspace, click **Subscribe** from the page Actions menu.

   The Subscription Options page opens with the alert events listed for the workspace.



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:
Folder Content Modified	Any content is added or removed from a folder or subfolder, or a new version of a file is checked in
Folder Created	A folder or subfolder is added to the workspace.
Folder Deleted	A folder or subfolder is deleted from the workspace.
Member Added	A member is added to the workspace.
Member Removed	A member is removed from the workspace.
Route Completed	All tasks are completed for a route in the workspace.
Route Started	A workspace member creates and starts a route.

5. Click **Done**.

Choosing Alert Events for a Route

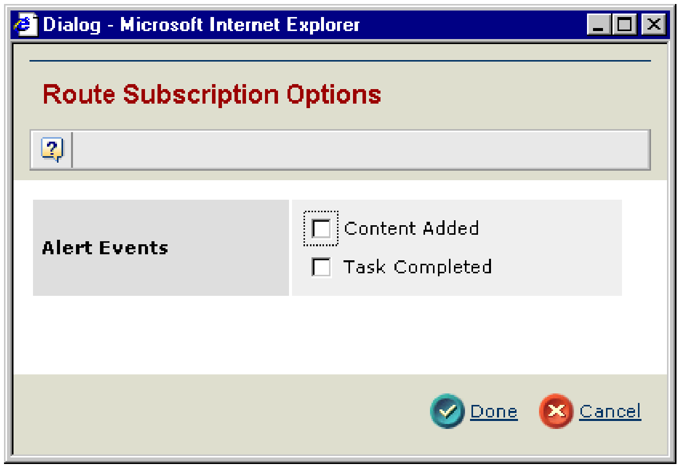
You can choose to be notified when content is added or a task is completed for any route that you create or for which you have a task. Workspace Leads can subscribe to any route in the workspace. Be aware that the application automatically notifies the route owner when the route is complete and it notifies 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** > **Team** > **Workspaces**.
2. From the Workspaces page, click the **Name** of the workspace.
3. From the Workspace page, click **Routes** in the category list.
4. From the Routes page, click the **Name** of the route.

5. From the Properties page for the route, click **Subscribe** from the page Actions menu.

   The Route Subscription Options page opens with the alert events listed for the route.

6. 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:
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.
Task Completed	A route member completes a task.

7. 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.

Choosing Alert Events for a Folder or Subfolder

You can choose to be notified when content is added or removed for any folder or subfolder to which you have access. The system sends out notifications for events that occur for the folder for which the subscription was chosen and not to its subfolders. To be notified about events for a subfolder, you must subscribe to that subfolder.

To choose notification events for a folder or subfolder

1. Click **My Desk** > **Team** > **Workspaces**. Then click the Name of the workspace.

   The workspace's category list and Properties page opens.

2. Click a folder name from the folders list.

   Or

   From the workspace category list, click **Folders** and from the Folders page, click the Name of the folder.

   To subscribe to a subfolder, click the plus sign to expand the folder list in the Structure Navigator and click the Name of the subfolder.

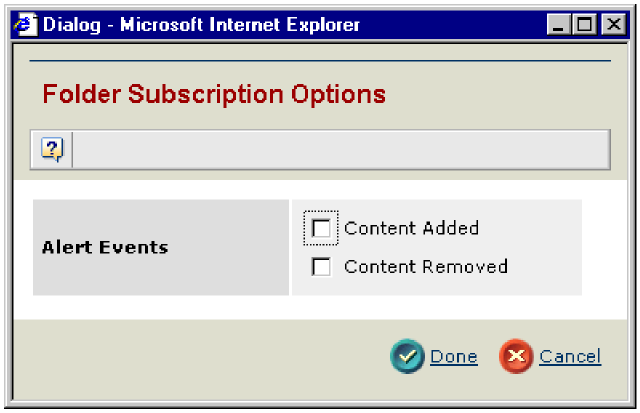
   Or

Click the folder’s Name from the Folders page. Then click **Subfolders** from the folder’s category list. Continue drilling down (clicking the subfolder’s Name and then Subfolder from the subfolder’s category list) until you see the category list and Properties page for the subfolder you want to subscribe to.

From the category list for the folder or subfolder, click **Properties**.

3. From the Properties page for the folder or subfolder, click **Subscribe** from the page Actions menu.

   The Folder Subscription Options page opens with the alert events listed for the folder/ subfolder.



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:
Content Added	A workspace member adds content to the folder or subfolder. This does not include updated versions of existing files.
Content Removed	A workspace member remove content from the folder or subfolder.

5. Click **Done**.

Choosing Alert Events for Folder Documents

You can choose to be notified when a file is locked for edit or an updated version is checked in.

To choose notification events for a document in a folder

1. Click **My Desk** > **Team** > **Workspaces**. Then click the Name of the workspace.

   The workspace’s category list and Properties page opens.

2. Click a folder name from the folders list.

   Or

   From the workspace category list, click **Folders** and from the Folders page, click the Name of the folder.

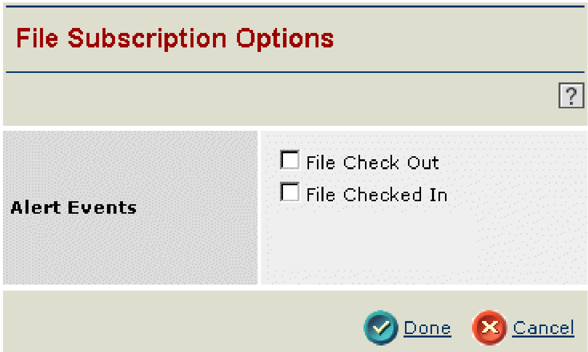
   To subscribe to a document in a subfolder, click the plus sign to expand the folder list in the Structure Navigator and click the Name of the subfolder.

Or

Click the folder's Name from the Folders page. Then click **Subfolders** from the folder's category list. Continue drilling down (clicking the subfolder's Name and then Subfolder from the subfolder's category list) until you see the category list for the subfolder you want to subscribe to.

3. From the Folder Content page, click the Name of the document you want to subscribe to.
4. From the folder or subfolder's category list, click **Properties**.
5. From the Properties page, click **Subscribe**.

   The File Subscription Options page opens with the alert events listed for the file.



6. 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 a workspace member:
File Check In	Checks in an updated version of the file.
File Check Out	Locks the file for editing.

7. Click **Done**.

   The category list and Properties page for the document redisplays.

Choosing Alert Events for an Item's Discussions

You can choose to be notified when a workspace member creates a new top-level discussion for an item. Workspaces, folders, subfolders, and folder content can have discussions.

To choose notification events for an item's discussions

1. Click **My Desk** > **Team** > **Workspaces**.
2. From the Workspaces page, click the **Name** of the workspace.
3. Access the category list for the item whose discussions you want to subscribe to:

   – To subscribe to the workspace's discussions, the category list for the workspace should already be open. (Step 2 should have opened the workspace category list.)

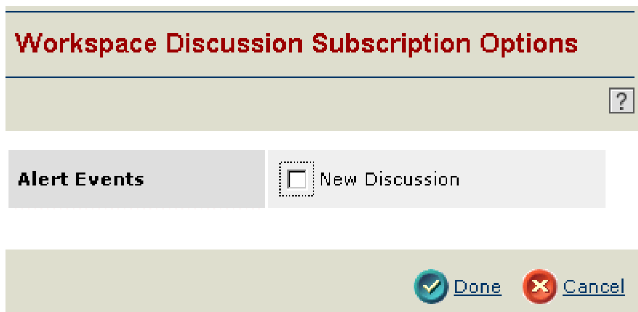
   – To subscribe to a folder's discussions, click the folder Name from the folders list or click **Folders** from the workspace category list and click the **Name** of the folder.

– To subscribe to a subfolder's discussions, click the plus sign to expand the folder in the folder list and click the name of the subfolder, or click **Subfolder** from the folder's category list and click the **Name** of the subfolder.

– To subscribe to discussions for folder or subfolder content, access the category list for the folder or subfolder using the above instructions. Then click the **Name** of the content.

4. From the category list for the item, click **Discussions**.
5. From the Discussions page, click **Subscribe** from the page Actions menu.

   The Discussion Subscription Options page opens with the alert events listed for the item's discussions.



6. To subscribe to an event, check the box to the left of it. To unsubscribe to an event, uncheck the box to the left of it.

If you choose this alert event:	Then the system will notify you whenever:
New Discussions	A workspace member posts a new top-level discussion for the item.

7. Click **Done**.

Choosing Alert Events for Individual Discussion Messages

You can choose to be notified when there is a reply to a specific message in a discussion. The system will notify you whenever there is a reply to the message you subscribe to. Be aware that you will not receive notifications for replies to replies and so on. However, you can subscribe to replies as well as to top-level messages.

To choose notification events for an individual message in a discussion

1. Click **My Desk** > **Team** > **Workspaces**.
2. From the Workspaces page, click the **Name** of the workspace.
3. Access the category list for the item that contains the discussion message:

   – To subscribe to a message in the workspace's discussions, the category list for the workspace should already be open. (Step 2 should have opened the workspace category list.)

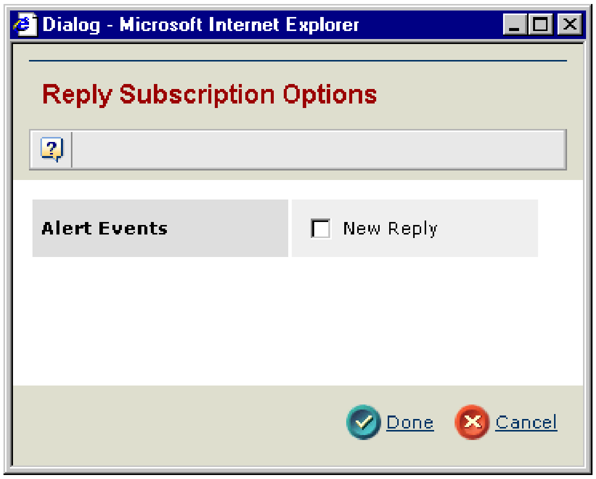
   – To subscribe to a message in a folder's discussions, click the folder Name from the folders list or click **Folders** from the workspace category list and click the Name of the folder.

– To subscribe to a message in a subfolder's discussions, click the plus sign to expand the folder in the folder list and click the name of the subfolder, or click **Subfolder** from the folder's category list and click the Name of the subfolder.

– To subscribe to message in discussions for folder or subfolder content, access the category list for the folder or subfolder using the above instructions. Then click the Name of the content.

4. From the category list for the item, click **Discussions**.
5. From the Discussions page, click the **Name** of the top-level message for the discussion that contains the message.
6. From the page that lists the discussion's messages, click **Subscribe** for the message you want to subscribe to. To expand the list of replies to a message, click the Right arrow next to the message subject.

The Reply Subscription Options page opens with the alert event listed for the message.



7. To subscribe to an event, check the box to the left of it. To unsubscribe to an event, uncheck the box to the left of it.

If you choose this alert event:	Then the system will notify you whenever:
New Reply	A workspace member posts a reply to this message. You will not be notified about replies to replies. To be notified about replies to replies, subscribe to the reply.

8. Click **Done**.

Receiving Subscription Notifications

You will receive notifications about the events you subscribe to in IconMail and at the email address specified in your profile. The subject of the notification will be the event for which you subscribed, such as Task Completed, Folder Created, or New Reply. The content of the message includes the name of the workspace component that you subscribed to and the date and time the event occurred. The message also contains a URL link to the item you subscribed to. To view details about the item, click the link. The messages for pushed subscriptions look identical to ones that you subscribe to yourself.

Workspace Component	Sample Notification Text	Comments
Workspace	"Folder Created" on "Workspace" "Team Workspace" "0000000001" at 07-17-2001 03:55 PM	The number that follows the name of the workspace represents the revision number for the workspace.
Folder	"Content Added" on "Workspace Vault" "Production" "0000000001" at 07-17-2001 03:17 PM	"Workspace Vault" is another name for a folder. The number that follows the name of the folder represents the revision number for the folder.
Route	"Task Completed" on "Route" "Review for Design Spec" "0000000001" at 07-17-2001 03:13 PM	The number that follows the name of the route represents the revision number for the route.
Folder Content	"File Check Out" on "Document" "0000000001DesignSpec.doc" "1" at 07-17-2001 03:52 PM	A number is pre-pended to the name of the file. The number that follows the file name is the revision number for the file.
All discussions for an item	"New Message" on "Thread" "0000000001DesignSpec.doc0" "1" at 07-17-2001 03:23 PM	"Thread" is another word for a discussion. For discussions about files, numbers are added to the beginning and end of the file name.
Individual messages within a discussion	"New Reply" on "Message" 'auto_531038257842028' "" at 07-17-2001 01:01 PM	The number after "Message" is the system-assigned name for the message. See ***Discussions***.

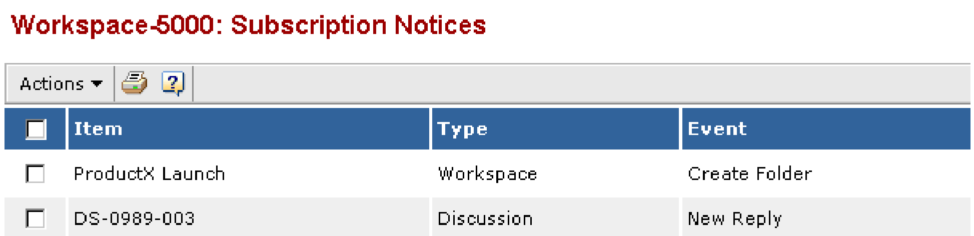
Unsubscribing to an Item

You can unsubscribe (remove the request to be notified) to any event that you previously subscribed to. You cannot remove subscriptions for events someone else has subscribed to for you.

To unsubscribe to an item

1. Click **My Desk** > **Team** > **Workspaces**.
2. From the Workspaces page, click the **Name** of the workspace.
3. From the workspace category list, click **Subscriptions**.

   The Subscription Notices page opens, listing all the events you are currently subscribed to for the workspace.



4. Check the events you want to unsubscribe to and click **Remove Selected** from the page Actions menu.

Discussions

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. Discussions can be created for workspaces, folders, subfolders, and individual content in folders. You access discussions for an item by clicking Discussions in the category list for the item.

- *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 of a workspace can list discussions for it. Everyone with Read access to a folder, subfolder, or content item 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 using the steps listed in this table for the item you want to work with.

To list discussions for a:	Follow these steps:
Workspace	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. The category list and Properties page for the workspace opens.
Folder	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Click the name of the folder from the folder list. ***Or*** Click **Folders** from the workspace category list and click the **Name** of the folder. **4.** To access the Routes page for the folder, click **Routes** from its category list. To access the Routes page for a subfolder, click **Subfolders** from the folder's category list. From the Subfolders page, click the **Name** of the subfolder. Continue drilling down the subfolders until you have the category list for the subfolder. Then click **Routes** from the category list.

To list discussions for a:	Follow these steps:
Subfolder	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Expand the folder from the folder list to see the subfolder names. ***Or*** Click **Folders** from the workspace category list, click the **Name** of the folder, and from the folder category list, click **Subfolders**. **4.** Click the **Name** of the subfolder. Continue drilling down the subfolders until you have the category list for the subfolder.
Folder content item (file, package, RFQ, quotation)	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Click the name of the folder from the folder list. ***Or*** Click **Folders** from the workspace category list and click the **Name** of the folder. **4.** From the Content page, click the **Name** of the item.

1. 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

Name	Replies	Last Message	Owner
Do you know about the...	11	2/5/2001	Smith, John
Interesting Discussion	25	5/4/2001	Jones, Michael
Message about File1234.doc	13	7/18/2001	Smith, Margot
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.

2. Use the **Actions** menu 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**. See ***Choosing Alert Events for an Item's Discussions***.
   - 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. See ***Choosing Alert Events for Others***.
   - 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 a workspace can create new discussions for it. Everyone with Read access to a folder, subfolder, or content 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

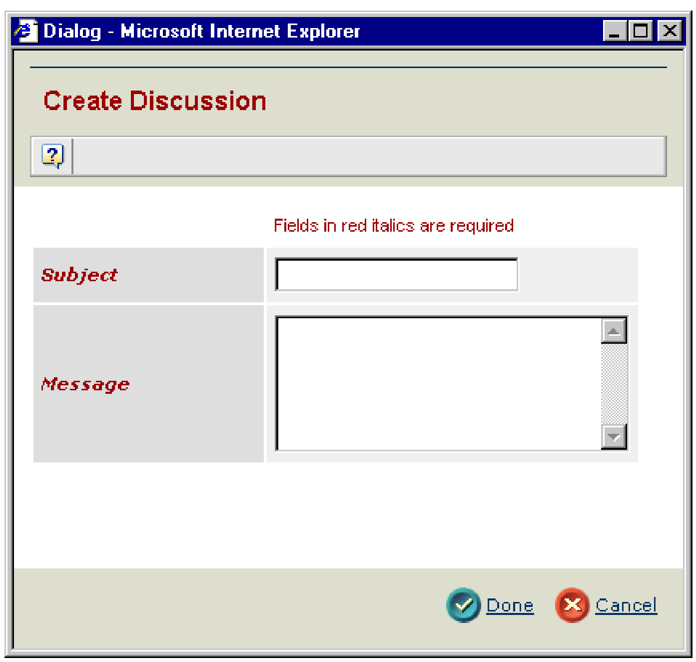
1. Navigate to the category list for the item using the steps listed in this table for the item you want to work with.

To list discussions for a:	Follow these steps:
Workspace	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. The category list and Properties page for the workspace opens.
Folder	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Click the name of the folder from the folder list. ***Or*** Click **Folders** from the workspace category list and click the **Name** of the folder. **4.** To access the Routes page for the folder, click **Routes** from its category list. To access the Routes page for a subfolder, click **Subfolders** from the folder's category list. From the Subfolders page, click the **Name** of the subfolder. Continue drilling down the subfolders until you have the category list for the subfolder. Then click **Routes** from the category list.

To list discussions for a:	Follow these steps:
Subfolder	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Expand the folder from the folder list to see the subfolder names. ***Or*** Click **Folders** from the workspace category list, click the **Name** of the folder, and from the folder category list, click **Subfolders**. **4.** Click the **Name** of the subfolder. Continue drilling down the subfolders until you have the category list for the subfolder.
Folder content item (file, package, RFQ, quotation)	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Click the name of the folder from the folder list. ***Or*** Click **Folders** from the workspace category list and click the **Name** of the folder. **4.** From the Content page, click the **Name** of the item.

1. From the category list for the item, click **Discussions**.
2. From the Discussions page, click **Create New** from the page Actions menu.

   The Create Discussion page appears.



3. In the **Subject** text box, type a word or short descriptive phrase that describes the content of the message.
4. In the **Message** text box, type your message.

5. 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 the workspace 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 that contains the discussion using the steps listed in this table for the item you want to work with.

To list discussions for a:	Follow these steps:
Workspace	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. The category list and Properties page for the workspace opens.
Folder	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Click the name of the folder from the folder list. ***Or*** Click **Folders** from the workspace category list and click the **Name** of the folder. **4.** To access the Routes page for the folder, click **Routes** from its category list. To access the Routes page for a subfolder, click **Subfolders** from the folder’s category list. From the Subfolders page, click the **Name** of the subfolder. Continue drilling down the subfolders until you have the category list for the subfolder. Then click **Routes** from the category list.

To list discussions for a:	Follow these steps:
Subfolder	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Expand the folder from the folder list to see the subfolder names. ***Or*** Click **Folders** from the workspace category list, click the **Name** of the folder, and from the folder category list, click **Subfolders**. **4.** Click the **Name** of the subfolder. Continue drilling down the subfolders until you have the category list for the subfolder.
Folder content item (file, package, RFQ, quotation)	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Click the name of the folder from the folder list. ***Or*** Click **Folders** from the workspace category list and click the **Name** of the folder. **4.** From the Content page, click the **Name** of the item.

1. From the category list for the item, click **Discussions**.
2. From the Discussions page, click the **Name** of the discussion thread whose messages you want to read.
3. 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.

Do you know about the...: Access

All

Actions

	Name	Type	Organization
	Billings, Maura	Person	Beckworth & Co.
	Buyer	Role	Beckworth & Co.
	Buyer Manager	Role	Beckworth & Co.
	Cannaberge, Florence	Buyer Desk Person	Beckworth & Co.
	Design Engineer	Role	Beckworth & Co.
	Engineer	Role	Beckworth & Co.
	Fullbright, Lars	Buyer Desk Person	Beckworth & Co.
	Irujo, Javier	Person	Beckworth & Co.
	Japoli, Octavia	Buyer Desk Person	Beckworth & Co.

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 workspace member creates a discussion for an item, the system automatically takes all the members who have at least Read access to the item and gives them access to the discussion. This list includes people and roles given access to the item from other workspaces and from Sourcing Central. 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 that contains the discussion using the steps listed in this table for the item you want to work with.

To list discussions for a:	Follow these steps:
Workspace	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. The category list and Properties page for the workspace opens.
Folder	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Click the name of the folder from the folder list. ***Or*** Click **Folders** from the workspace category list and click the **Name** of the folder. **4.** To access the Routes page for the folder, click **Routes** from its category list. To access the Routes page for a subfolder, click **Subfolders** from the folder's category list. From the Subfolders page, click the **Name** of the subfolder. Continue drilling down the subfolders until you have the category list for the subfolder. Then click **Routes** from the category list.

<table>
<tr><th>To list discussions for a:</th><th>Follow these steps:</th></tr>
<tr><td>Subfolder</td><td>1. Click My Desk > Team > Workspaces.
2. Click the Name of the workspace.
3. Expand the folder from the folder list to see the subfolder names.
Or
Click Folders from the workspace category list, click the Name of the folder, and from the folder category list, click Subfolders.
4. Click the Name of the subfolder.
Continue drilling down the subfolders until you have the category list for the subfolder.</td></tr>
<tr><td>Folder content item (file, package, RFQ, quotation)</td><td>1. Click My Desk > Team > Workspaces.
2. Click the Name of the workspace.
3. Click the name of the folder from the folder list.
Or
Click Folders from the workspace category list and click the Name of the folder.
4. From the Content page, click the Name of the item.</td></tr>
</table>

1. From the category list for the item, click **Discussions**.
2. From the Discussions page, click the **Name** of the discussion thread whose messages you want to read.
3. 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.

Do you know about the...: Access

All

Actions

	Name	Type	Organization
☐	Billings, Maura	Person	Beckworth & Co.
☐	Buyer	Role	Beckworth & Co.
☐	Buyer Manager	Role	Beckworth & Co.
☐	Cannaberge, Florence	Buyer Desk Person	Beckworth & Co.
☐	Design Engineer	Role	Beckworth & Co.
☐	Engineer	Role	Beckworth & Co.
☐	Fullbright, Lars	Buyer Desk Person	Beckworth & Co.
☐	Irujo, Javier	Person	Beckworth & Co.
☐	Japoli, Octavia	Buyer Desk Person	Beckworth & Co.

4. 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.

5. 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 workspace folder. 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 a Team 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.

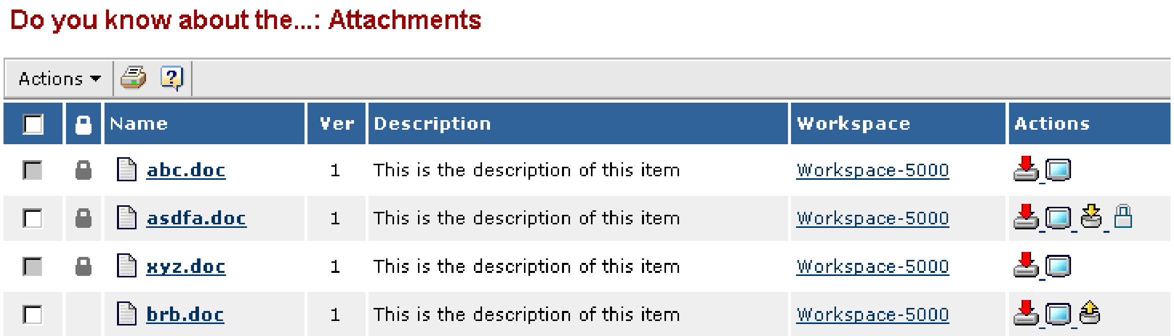
To list the attachments for a discussion

1. Navigate to the category list for the item that contains the discussion using the steps listed in this table for the item you want to work with.

To list discussions for a:	Follow these steps:
Workspace	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. The category list and Properties page for the workspace opens.
Folder	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Click the name of the folder from the folder list. ***Or*** Click **Folders** from the workspace category list and click the **Name** of the folder. **4.** To access the Routes page for the folder, click **Routes** from its category list. To access the Routes page for a subfolder, click **Subfolders** from the folder's category list. From the Subfolders page, click the **Name** of the subfolder. Continue drilling down the subfolders until you have the category list for the subfolder. Then click **Routes** from the category list.
Subfolder	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Expand the folder from the folder list to see the subfolder names. ***Or*** Click **Folders** from the workspace category list, click the **Name** of the folder, and from the folder category list, click **Subfolders**. **4.** Click the **Name** of the subfolder. Continue drilling down the subfolders until you have the category list for the subfolder.
Folder content item (file, package, RFQ, quotation)	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Click the name of the folder from the folder list. ***Or*** Click **Folders** from the workspace category list and click the **Name** of the folder. **4.** From the Content page, click the **Name** of the item.

1. From the category list for the item, click **Discussions**.
2. From the Discussions page, click the **Name** of the discussion thread whose attachments you want to view.
3. 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

		Name	Ver	Description	Workspace	Actions
		abc.doc	1	This is the description of this item	Workspace-5000	
		asdfa.doc	1	This is the description of this item	Workspace-5000	
		xyz.doc	1	This is the description of this item	Workspace-5000	
		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.

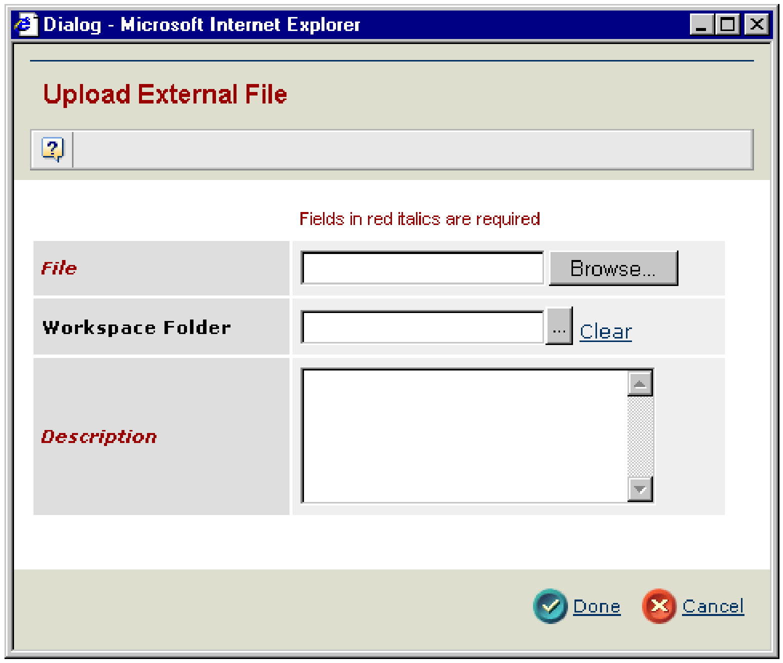
- **File Download** —Use to save the file to a local disk. If you plan to make changes to the file and then check in a new version, use the Lock for Edit icon instead of the Download icon. To view the document in an associated program immediately, without first saving the file to disk, use the View icon. For instructions on downloading a file, see the ***Common Components User Guide***.
- **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. See the ***Common Components User Guide***.
- **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. See the ***Common Components User Guide***.
- **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. See the ***Common Components User Guide***.

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 Team Central 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 ***Searching for Items***.
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 using the steps listed in this table for the item you want to work with.

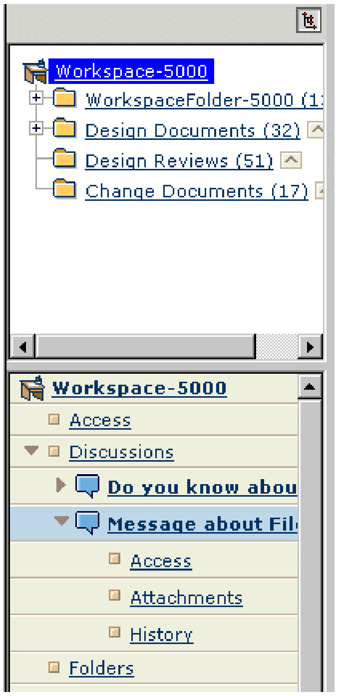
To list discussions for a:	Follow these steps:
Workspace	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. The category list and Properties page for the workspace opens.
Folder	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Click the name of the folder from the folder list. ***Or*** Click **Folders** from the workspace category list and click the **Name** of the folder. **4.** To access the Routes page for the folder, click **Routes** from its category list. To access the Routes page for a subfolder, click **Subfolders** from the folder's category list. From the Subfolders page, click the **Name** of the subfolder. Continue drilling down the subfolders until you have the category list for the subfolder. Then click **Routes** from the category list.

To list discussions for a:	Follow these steps:
Subfolder	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Expand the folder from the folder list to see the subfolder names. ***Or*** Click **Folders** from the workspace category list, click the **Name** of the folder, and from the folder category list, click **Subfolders**. **4.** Click the **Name** of the subfolder. Continue drilling down the subfolders until you have the category list for the subfolder.
Folder content item (file, package, RFQ, quotation)	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Click the name of the folder from the folder list. ***Or*** Click **Folders** from the workspace category list and click the **Name** of the folder. **4.** From the Content page, click the **Name** of the item.

1. From the category list for the item, click **Discussions**.
2. 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.



3. 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.

4. 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

5. 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 ***Choosing Alert Events for Individual Discussion Messages***.
- 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

1. Navigate to the category list for the item that contains the discussion using the steps listed in this table for the item you want to work with.

To list discussions for a:	Follow these steps:
Workspace	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. The category list and Properties page for the workspace opens.
Folder	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Click the name of the folder from the folder list. ***Or*** Click **Folders** from the workspace category list and click the **Name** of the folder. **4.** To access the Routes page for the folder, click **Routes** from its category list. To access the Routes page for a subfolder, click **Subfolders** from the folder’s category list. From the Subfolders page, click the **Name** of the subfolder. Continue drilling down the subfolders until you have the category list for the subfolder. Then click **Routes** from the category list.

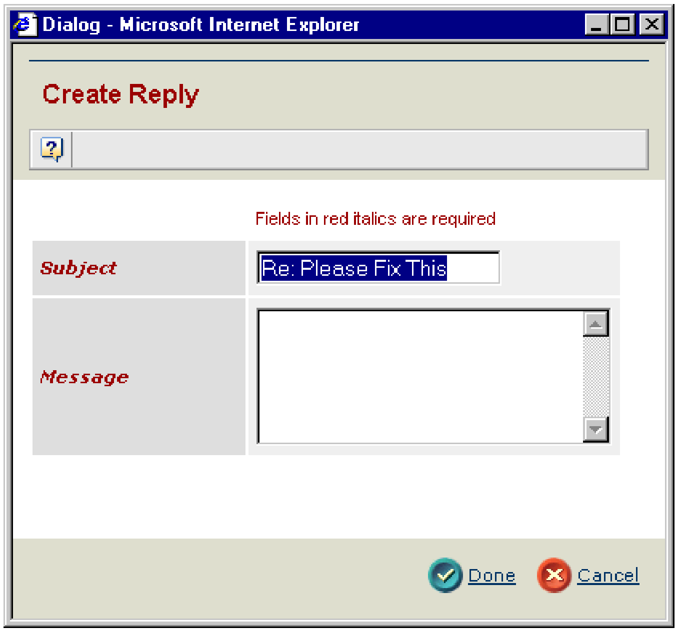
To list discussions for a:	**Follow these steps:**
Subfolder	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Expand the folder from the folder list to see the subfolder names. ***Or*** Click **Folders** from the workspace category list, click the **Name** of the folder, and from the folder category list, click **Subfolders**. **4.** Click the **Name** of the subfolder. Continue drilling down the subfolders until you have the category list for the subfolder.
Folder content item (file, package, RFQ, quotation)	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Click the name of the folder from the folder list. ***Or*** Click **Folders** from the workspace category list and click the **Name** of the folder. **4.** From the Content page, click the **Name** of the item.

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 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.
4. Find the message you want to reply to. Expand the list of replies as needed to find the message.

5. 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**.

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 using the steps listed in this table for the item you want to work with.

To list discussions for a:	Follow these steps:
Workspace	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. The category list and Properties page for the workspace opens.
Folder	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Click the name of the folder from the folder list. ***Or*** Click **Folders** from the workspace category list and click the **Name** of the folder. **4.** To access the Routes page for the folder, click **Routes** from its category list. To access the Routes page for a subfolder, click **Subfolders** from the folder's category list. From the Subfolders page, click the **Name** of the subfolder. Continue drilling down the subfolders until you have the category list for the subfolder. Then click **Routes** from the category list.
Subfolder	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Expand the folder from the folder list to see the subfolder names. ***Or*** Click **Folders** from the workspace category list, click the **Name** of the folder, and from the folder category list, click **Subfolders**. **4.** Click the **Name** of the subfolder. Continue drilling down the subfolders until you have the category list for the subfolder.
Folder content item (file, package, RFQ, quotation)	**1.** Click **My Desk** > **Team** > **Workspaces**. **2.** Click the **Name** of the workspace. **3.** Click the name of the folder from the folder list. ***Or*** Click **Folders** from the workspace category list and click the **Name** of the folder. **4.** From the Content page, click the **Name** of the item.

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**.

4

Meetings

Overview of Web Meetings

Workspace teams can use Team Central to schedule, join, and manage Web meetings. A Web meeting lets you conference with other people—live and over the Internet. Meeting attendees can share and mark up documents, give presentations, lead Web tours, demo applications, and share Desktops.

- *Prerequisites for Working with Web Meetings*
- *Listing Meetings You are Participating In*
- *Viewing Information about a Meeting*
- *Scheduling a New Meeting*
- *Adding or Removing Attendees*
- *Editing Details for a Meeting*
- *Setting Additional Options for a Meeting*
- *Starting a Meeting*
- *Joining a Meeting*
- *Leaving, Ending, and Closing a Meeting*
- *Deleting a Meeting*

Prerequisites for Working with Web Meetings

Before your company can use the application to schedule Web meetings, these prerequisites must be satisfied:

- Your organization must register with WebEx at http://www.webex.com. Make a note of your WebEx site ID and site name. The site name is a URL specific for your company's use of WebEx.
- Enter the WebEx Site ID and Site Name in the Meeting Site ID and Meeting Site Name boxes for each company and/or business unit that will use Team Central to schedule and join Web meetings. For instructions on modifying your organization's profile, see Common Profile in the ***Common Components User Guide***.
- All employees who will join or schedule meetings must have a Meeting User Name and Meeting Password. All employees who will schedule meetings must have the Host Meetings access set to Yes. For instructions on modifying a person's profile, see the ***Common Components User Guide***.

Listing Meetings You are Participating In

You can see a list of all unfinished meetings for which you are a host or an attendee. You can get the meeting list for all workspaces or for a specific workspace. Both lists show the same information for each meeting.

To list the meetings for which you are a host or attendee

1. To see meetings for all workspaces, click **My Desk** > **Team** > **Meetings**.

   Or

   To see meetings for a specific workspace only:

   a) Click **My Desk** > **Team** > **Workspaces**.

   b) Click the **Name** of the workspace.

   The workspace's category list and Properties page opens.

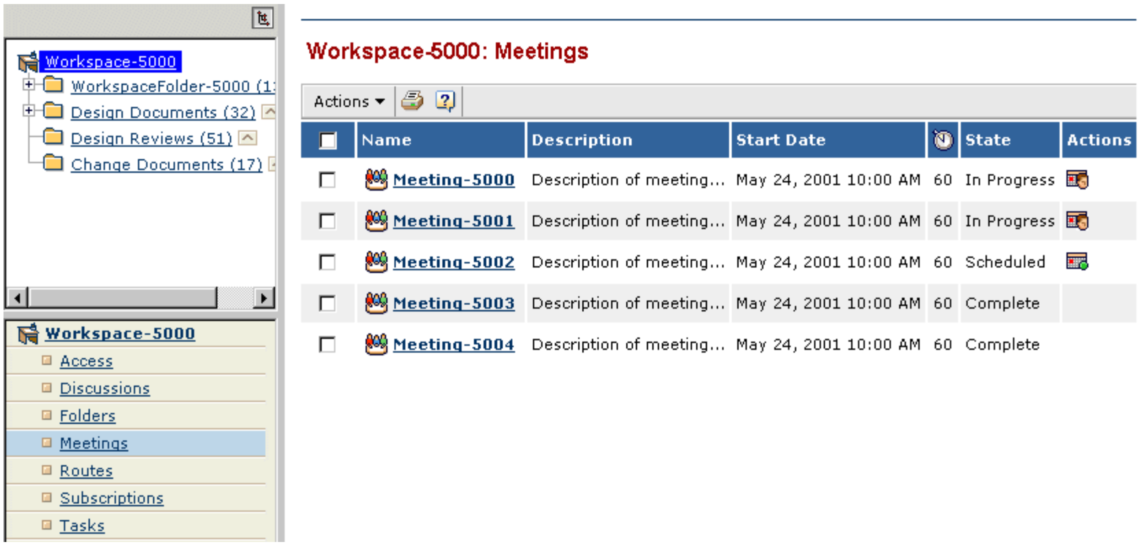
   c) From the category list, click **Meetings**.

2. From the Meetings page, view your list of meetings.

   The Meetings page lists all meetings for which you are a host or attendee except those that:

   – have been deleted by the meeting host (creator)

   – you are not the host for and that have a Complete status



Name—The name given to the meeting by the meeting creator.

Description—The description entered by the meeting creator.

Start Date—The date and time the meeting starts. If the meeting host is in a different time zone than you, the time has been converted to your local time. For example, suppose the meeting host is in Japan and specifies the meeting time as 3 pm. If you are in Germany, the meeting time will display as 7 am.

(Length)—The number of minutes the meeting is scheduled to last.

State—Scheduled, In Progress, Complete. Scheduled means the meeting hasn't started yet. If you created the meeting, you can start it by clicking the Start Meeting icon. In Progress means the meeting is currently taking place and you can join the meeting by clicking the Join Meeting icon. Complete means the original meeting host has closed the meeting so no one else can join in.

Actions—Provides links to execute the action available for the meeting, if any. If you created the meeting and the state is Scheduled, the action is Start Meeting. If the meeting is In Progress, the action is Join Meeting. If you created the meeting and left the meeting without closing it, the action also includes Close Meeting. Otherwise, no action is available. When starting and joining a meeting, you can choose the language you would like for the text on the meeting pages.

- To start a meeting, click the icon. See ***Starting a Meeting***.
- To join a meeting, click the icon for any In Progress meeting. See ***Joining a Meeting***.
- To close a meeting that you started and then left, but didn't close, click the icon. See ***Leaving, Ending, and Closing a Meeting***.

If your system has been configured to all the meeting host to specify a language, the Actions column includes a Language drop-down list for all meetings for which you are the host. The language you choose for a meeting is the language the user interface appears in for all attendees. For information on configuring this option, see the Administrator's Guide.

3. Work with the meetings as needed:

- To see details about a meeting or change the attendees (available for the meeting creator only), click the meeting name. For more information, see ***Viewing Information about a Meeting*** and ***Adding or Removing Attendees***.
- To create a meeting, click **Create New** from the page Actions menu. See ***Scheduling a New Meeting***.
- To remove a meeting, check the box next to its name (available for the meeting creator only) and click **Remove** from the page Actions menu. See ***Deleting a Meeting***.
- To start a Scheduled meeting that you created, click the **Start Meeting** icon. See ***Starting a Meeting***.
- To join a meeting, click the **Join Meeting** icon for any In Progress meeting. See ***Joining a Meeting***.
- To close a meeting that you started and then left, but didn't close, click the **Close Meeting** icon. See ***Leaving, Ending, and Closing a Meeting***.

Viewing Information about a Meeting

The category list and Properties page for a meeting lists meeting information and attendees.

To view information about a meeting you will (or did) attend

1. Click **My Desk** > **Team** > **Meetings**.

   Or

   From the category list for a workspace, click **Meetings**.
2. Click the **Name** of the meeting you want to see details about.

   The category list and Properties page for the meeting opens.

Subject—The name given to the meeting by the meeting creator.

Meeting Location—The specific room or area of the building where the meeting will be held if the meeting is not an online meeting.

Description—The description entered by the meeting creator.

Start Date—The date the meeting starts.

Start Time—The time the meeting starts. The time is converted to your local time, even if the meeting host and/or other attendees are in a different time zone. For example, suppose the meeting host schedules a meeting for 1 pm and she is in the Eastern Standard Time (EST) zone. If you are in Pacific Standard Time (PST), the meeting start time will display as 10 am for you.

Duration—The number of minutes the meeting is scheduled to last.

State—Scheduled, In Progress, Complete. Scheduled means the meeting hasn't started yet. If you created the meeting, you can start it. In Progress means the meeting is currently taking place and you can join the meeting. If you created the meeting and left the meeting without closing it, you can close the meeting. Complete means the original meeting host has closed the meeting so no one else can join the meeting.

Conference Call #—For online meetings, the telephone number meeting participants will call to join the meeting.

Conference Call Access Code—For online meetings, the code meeting participants must enter in order to join the online meeting, similar to a password.

Online Meeting Provider—Web-based meeting integration group, for example, Webex.

Online Meeting Instructions—Details of steps that meeting participants must follow to join the meeting. If a URL link is included, you can click the link to open your default Web browser and access the Web page of the meeting provider.

Language—The language the text will appear in on the meeting pages. The meeting host sets the language for all participants.

3. Using the links at the top of the Properties page, work with the meeting as needed:
   - To edit the properties listed, click **Edit Details** from the page Actions menu. Only the meeting host can edit this information. The meeting must be in the Create state. See ***Editing Details for a Meeting***.
   - To start a Scheduled meeting that you created, click **Start Meeting** from the page Actions menu. See ***Starting a Meeting***.
   - To join an In Progress meeting, click **Join Meeting** from the page Actions menu. See ***Joining a Meeting***.
   - To close a meeting that you started and then left, but didn't close, click **Close Meeting** from the page Actions menu. See ***Leaving, Ending, and Closing a Meeting***.
   - To promote a meeting to the Scheduled state, click **Promote** from the page Actions menu. Attendees are notified by email.
4. To see a list of documents attached to the meeting, click **Attachments** from the category list. See ***Listing and Adding Attachments for a Meeting***.
5. To see a list of attendees for the meeting, click **Attendees** from the category list.

   The category list and Properties page for the meeting opens, listing all people who have been added as attendees. To see a profile of a person, click the person's Name. To e-mail an attendee, click the person's E-mail address. For instructions on adding and removing attendees, see ***Adding or Removing Attendees***.

Meeting-5000: Attendees

Actions

	Name	Organization	Work Phone Number	E-mail	Attendance
	Billings, Maura	Beckworth & Co.	(555) 555-5555	billings@beckworth.com	Absent
	Cannaberge, Florence	Beckworth & Co.	(555) 555-5555	cannaberge@beckworth.com	Absent
	Fullbright, Lars	Beckworth & Co.	(555) 555-5555	fullbright@beckworth.com	Absent
	Irujo, Javier	Beckworth & Co.	(555) 555-5555	irujo@beckworth.com	Present

Listing and Adding Attachments for a Meeting

During the course of a meeting, a participant may need to attach a document. A file can be uploaded externally or added from a workspace folder. Attachments can be added to any meeting. Only documents can be attached to the meeting and not other type objects (like Sourcing central packages, quotations and RFQs).

The owner of the meeting can delete any attendee's attachment so that s/he can delete the entire meeting if desired. All meeting attendees can remove only attachments that they own. If a workspace folder document is removed, it is disconnected from meeting, but still remains in workspace folder. When a document that is not in a workspace folder is removed, it is deleted from the database. A message is displayed to confirm the delete.

Clicking the Attachment link in the meeting category list displays a summary of all attachments to the meeting. The owner and all persons that have at least read access to the parent object of the meeting have access to this summary and will see all attachments to the root message as well as all replies. If a document is in a Team Central folder, all who have access to the folder also have access to the document, which means that all meeting attendees may not have access to it. For uploaded external files, all meeting participants have download, checkout, checkin, view, and unlock access to the file.

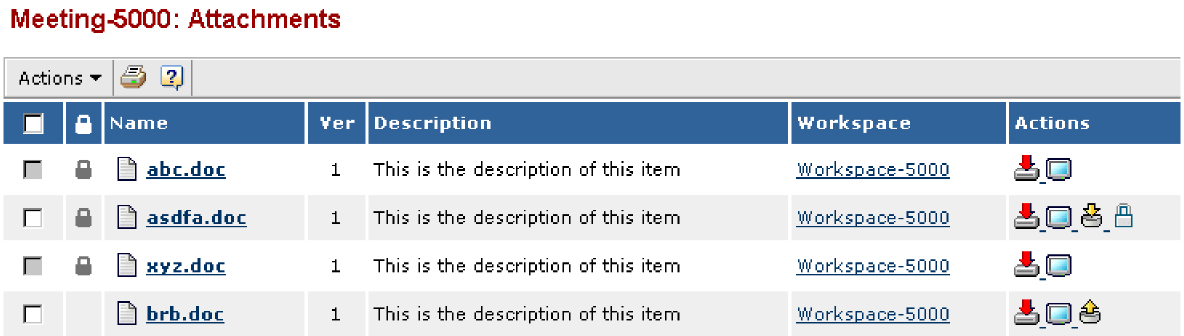
To list the attachments for a meeting

1. Click **My Desk** > **Team** > **Meetings**.

   Or

   From the category list for the meeting's workspace, click **Meetings**.
2. From the Meetings page, click the **Name** of the meeting you want to view attachments for.
3. From the category list for the meeting, click **Attachments**.

   The Meeting Attachments page opens, listing all documents added to the meeting.


Meeting-5000: Attachments

Actions

		Name	Ver	Description	Workspace	Actions
		abc.doc	1	This is the description of this item	Workspace-5000	
		asdfa.doc	1	This is the description of this item	Workspace-5000	
		xyz.doc	1	This is the description of this item	Workspace-5000	
		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 about the contents of the document.

Workspace—The workspace folder where the document is stored.

Date—The date and time this version of the item was added to the workspace folder that contains it.

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. For instructions on viewing non-3D documents, see the ***Common Components User Guide***. For information about viewing and adding 3D documents, see ***Viewing and Marking Up a 3D Document*** in Chapter 3. 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. For instructions on downloading a file, see the ***Common Components User Guide***.

- **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. See the ***Common Components User Guide***.

- **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. See the ***Common Components User Guide***.

- **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. See the ***Common Components User Guide***.

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, an Upload External File page may appear. If so, enter the same **Username** and **Password** that you enter when logging into Team Central and click **Login**.

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 workspace folder name for the file, or click to select a workspace folder.

   Description—Type details that explain the contents of the file.

3. Click **Done**.

To add documents from the workspace

1. Click **Add File(s) from Workspace** from the page Actions menu.
2. Enter criteria on the Search page. For help entering criteria, see ***Searching for Items***.
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 meeting participants may not have access to it.

To remove an attachment from the meeting

The owner of the root message can remove an attachment as well as the reply owner.

1. From the Attachments page, check one or more files that you want to remove.
2. Click **Remove** from the page Actions menu.

   An alert is displayed to indicate that files that have been uploaded externally will be removed from the System.

3. Click **OK** to remove files.

Scheduling a New Meeting

Before you can create a meeting, your company must have a meeting site name and ID, and you must enter a meeting username and password in your user profile. See the ***MatrixOne Common Components User Guide***.

When you schedule a meeting, you become the meeting host. Only the meeting host can start a meeting and mark it as completed. The meeting host cannot leave the meeting unless the person assigns another host (which can be done using the window available when conducting the meeting) or ends the meeting.

To schedule a new meeting

1. Click **My Desk** > **Team** > **Workspaces**.
2. From the Workspaces page, click the **Name** of the workspace that you want to create the meeting for.
3. From the workspace category list, click **Meeting**.
4. On the Meetings page, click **Create New** from the page Actions menu.

   If a page appears that says you do not have a WebEx account, click **Close** and contact your Company Representative. The Representative should define a username and password for you in WebEx and then enter the meeting username and password for your employee profile.

   If a page appears that says your organization site name is incorrect, your Company Representative must enter a site name for your company.

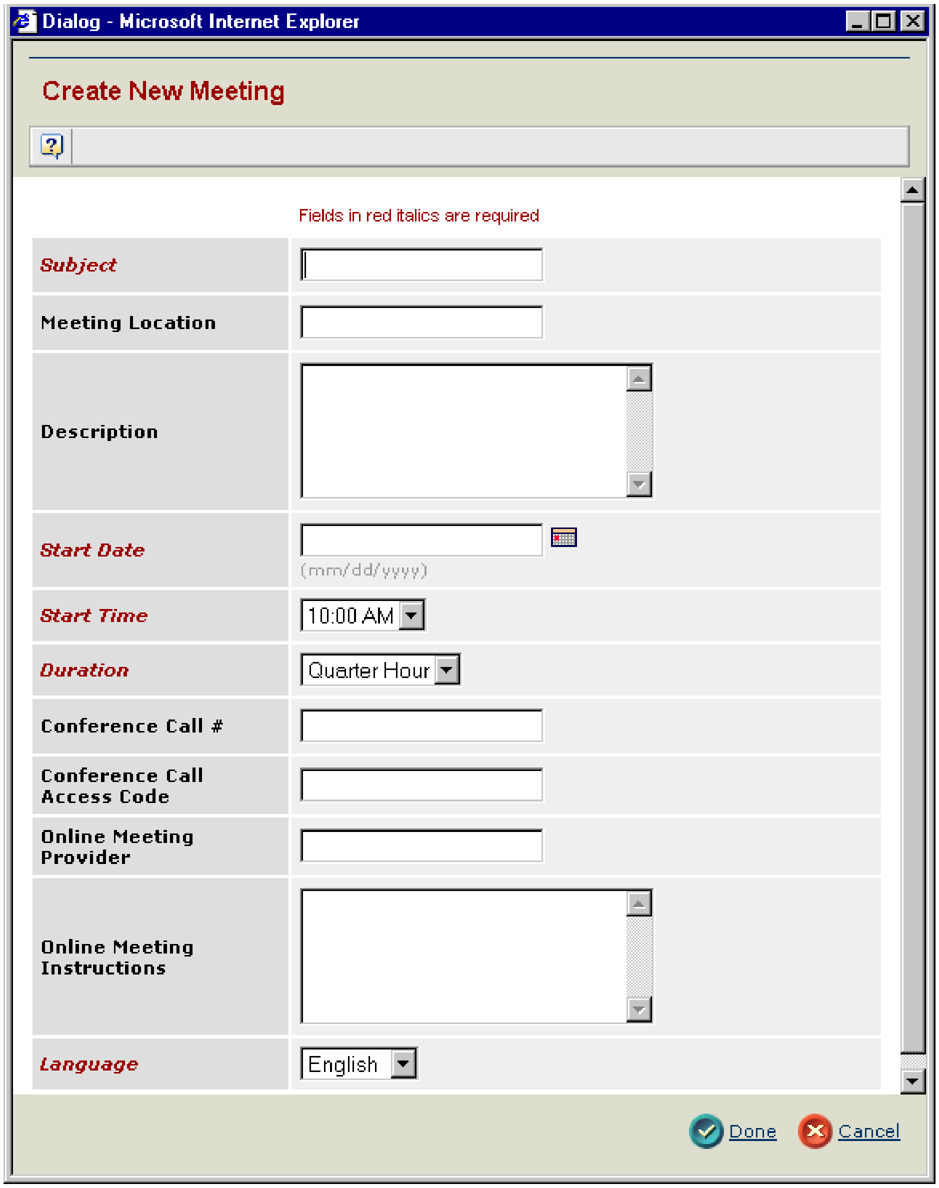
   If a page appears asking for your meeting username and password:

   a) Enter a **Meeting User Name** and **Meeting Password**. They can be any set of characters but cannot be the same as an existing username and password set up for your company in WebEx.

   b) The pages lists the **Email Address** entered for your profile. This email address must not be one that is already entered for a user in WebEx.

   c) Click **Done**.

   When the system verifies that your company and profile is set up to create a meeting, the Create New Meeting page opens.



5. Enter details about the meeting, including the following:

Subject—This is the name all attendees will see for the meeting.

Meeting Location—Describe where the meeting will be held. This could be the name of a building, conference room number or name, etc. You could also type “con call” if the meeting will be held over the phone.

Description—Describe the purpose of the meeting. For example, you may want to give a brief description of the agenda, presenters, or items attendees should have available during the meeting. The description is included in the notification that is sent to meeting attendees.

Start Date—Click the Calendar icon to choose a date for the meeting.

Start Time—Choose the time you want the meeting to start for your local time zone. When attendees are notified of the meeting, the meeting start time is converted to their local time.

Duration—Enter the estimated time that the meeting will last in minutes. If the duration exceeds the duration that your company has agreed to with the Web meeting provider, you will receive an error message. Lower the duration.

Conference Call #—For online meetings, type the telephone number that meeting participants will call to join the meeting.

Conference Call Access Code—For online meetings, type the code that meeting participants must enter in order to join the meeting, similar to a password.

Online Meeting Provider—Type the name of the Web-based meeting integration group, for example, Webex.

Online Meeting Instructions—Type details of steps that meeting participants must follow to join the meeting. If a URL link is included, you can click the link to open your default Web browser and access the Web page of the meeting provider.

Language—Choose the language that you want the meeting user interface to appear in for all attendees. For instructions on configuring the system so it shows or hides this option, see the Administrator's Guide.

6. Click **Done**.

   The category list and Properties page for the meeting opens.

   Now you should add attendees for the meeting. See ***Adding or Removing Attendees***.

Adding or Removing Attendees

You can add and remove attendees for Web meetings that you scheduled but have not yet started. Be aware that although you can add as many attendees as you want, the Web meeting provider may impose a limit to the number of people who can simultaneously join a Web meeting. Roles and people who have access to the workspace because they belong to an assigned role cannot be added as attendees. You can add workspace members, or you can add people from your company and its collaborated partners.

Removing meeting attendees just removes the connection between the attendee and the meeting. It has no effect on the person's other workspace connections.

To add or remove attendees

1. Click **My Desk** > **Team** > **Meetings**.

   Or

   From the category list for the meeting's workspace, click **Meetings**.

2. From the Meetings page, click the **Name** of the meeting you want to add or remove attendees for.

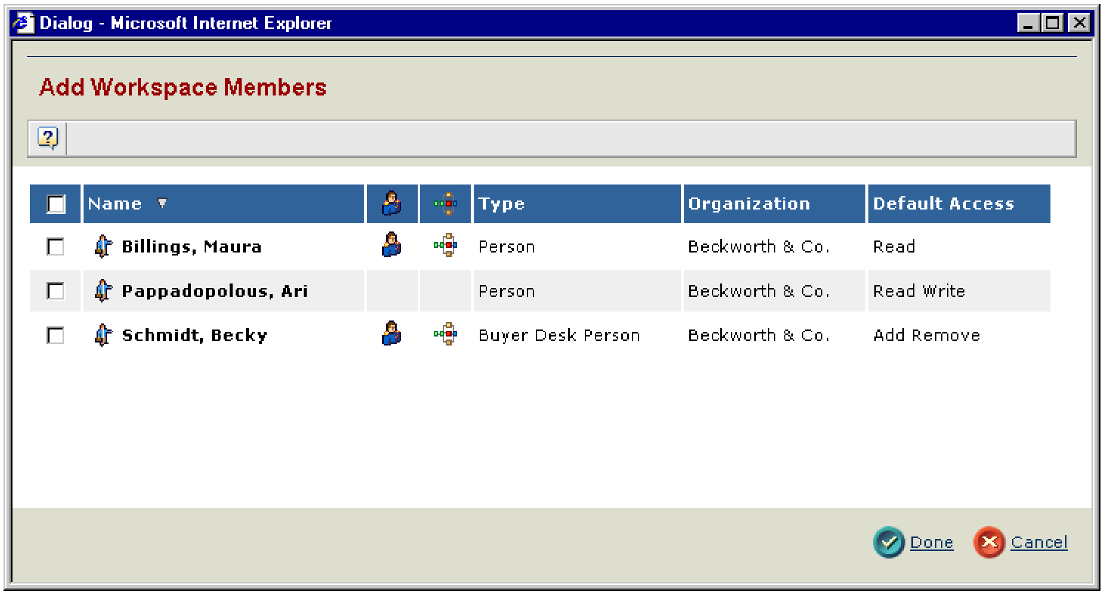
3. From the category list for the meeting, click **Attendees**.

   The Meeting Attendees page opens, listing all people added as attendees.

4. To add workspace members:

   a) Click **Add Member(s)** from the page Actions menu.

   The Add Workspace Members page for meetings opens, listing all members of the current workspace (except members already assigned as attendees).



b) Check the workspace members who should attend.

c) Click **Done**.

5. To add members from outside the workspace:

a) Click **Add Member(s)**.

The Add Members link is available only if the eMatrix Business Administrator has configured Team Central to be able to add people from outside the workspace.

The Find People page for opens, where you can find any person in your company as well as any Collaboration Partner companies. For details, see ***Choosing by Searching***.

b) From the search results, click the check box(es) for people who should attend.

c) Click **Done**.

The Meeting Attendees page appears again with the new attendees added. The system notifies the new attendees about the meeting via email and IconMail. The message includes the host, description, and meeting date and time. The meeting time is converted to the local time for each attendee.

6. To remove attendees:

a) From the Meeting Attendees page, check the attendees you want to remove.

b) Click **Remove** from the page Actions menu.

c) At the confirmation message, click **OK**.

The meeting will now be listed on the Meetings page for all attendees. When you go to the URL for your company's Web meetings, the meeting is listed in the My Meetings list. For information on additional options available, see ***Setting Additional Options for a Meeting***. There are additional options available for your meeting from the Meeting Center.

Editing Details for a Meeting

You can edit the details—such as start time and date, duration, and description—for Web meetings that you have not yet promoted to the Scheduled state. If the meeting has already been promoted, you must demote it if you want to edit details. When you promote it again, notifications are sent to the meeting attendees to inform them of the changes you have made.

To edit the details of a meeting

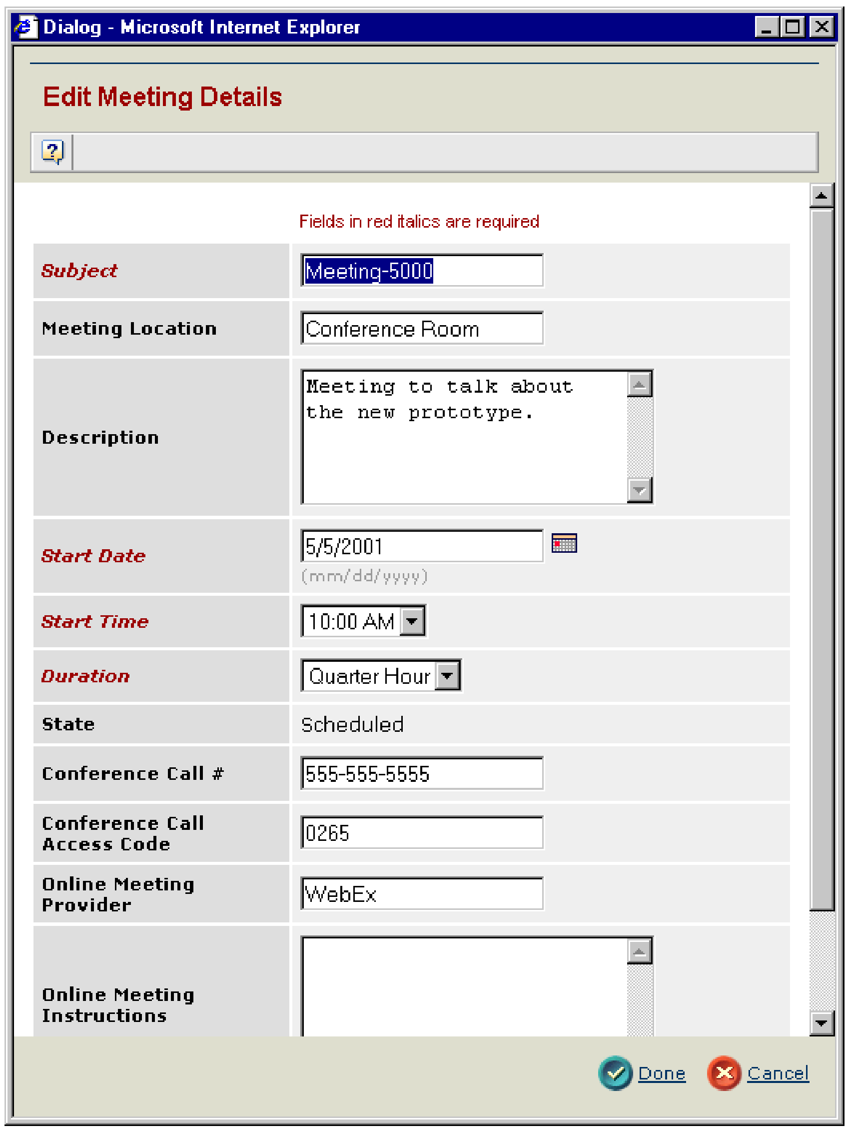
1. Click **My Desk** > **Team** > **Meetings**.

   Or

   From the category list for the meeting's workspace, click **Meetings**.

2. From the Meetings page, click the **Name** of the meeting you want to edit.

3. From the Properties page for the meeting, click **Edit Details** from the page Actions menu.



4. Change the meeting **Subject** as needed. This is the name all attendees will see for the meeting.
5. Change the **Meeting Location** as needed.
6. Edit the **Description** as needed.

   For example, you may want to give a brief description of the agenda, presenters, or items attendees should have available during the meeting. The description is included in the notification that is sent to meeting attendees.
7. To change the **Start Date**, click the Calendar icon.
8. To change the **Start Time**, choose a new time from the drop-down list. Choose the time you want the meeting to start for your local time zone.

   When attendees are notified of the meeting, the meeting start time is converted to their local time.
9. Change the **Duration**, in minutes, if needed.
10. Change the **Conference Call #**, if needed. Type the telephone number that meeting participants will call to join the meeting.
11. Change the **Conference Call Access Code**, if needed. Type the code that meeting participants must enter in order to join the meeting, similar to a password.
12. Change the **Online Meeting Provider**. Type the name of the Web-based meeting integration group, for example, Webex.
13. Change or type additional **Online Meeting Instructions**. Include details of steps that meeting participants must follow to join the meeting.
14. Click **Done**.

Setting Additional Options for a Meeting

After you create a meeting in Team Central, you can go to the URL for your company's Web meetings to access the meeting. From the Meeting Center, click **My Meetings** from the list on the left. To edit the meeting, click the meeting name in the My Meetings list. For example, you can establish a password for the meeting; choose specific features to be available, such as allowing file transfers, displaying the attendee list, and allowing people to chat; require registration; and set additional notifications (Team Central automatically notifies attendees once when you add them as attendees).

For help using the Meeting Center, click **Support** in the list on the left.

Starting a Meeting

You can start any meeting that you scheduled.

To start a scheduled meeting

1. Click **My Desk** > **Team** > **Meetings**.

   Or

   From the category list for the meeting's workspace, click **Meetings**.
2. From the Meetings page, click the **Start Meeting** icon for the meeting you want to start.

If this is the first time you've started or joined a Web meeting, a Security Warning dialog box appears and asks if you want to install client software. Click **Yes** and wait for a few moments while the software is set up.

A message may also appear indicating that you are going to an outside site. To continue, click Yes.

The meeting window opens.

3. To share documents or presentations, an application, a Desktop, whiteboard, or Web page, click the **Share** button in the lower left corner or choose from the Share menu.
4. For help using the meeting window, click **Help** > **Contents**.
5. When you're ready to leave or end the meeting, see ***Leaving, Ending, and Closing a Meeting***.

Joining a Meeting

After the meeting host has started a meeting, as indicated by a status of In Progress, you can join the meeting. As long as the meeting has not yet ended and has not been closed, you can also rejoin a meeting that you left.

To join a meeting

1. Click **My Desk** > **Team** > **Meetings**.

   Or

   From the category list for the meeting's workspace, click **Meetings**.
2. From the Meetings page, find the In Progress meeting that you want to join.

   If this is the first time you've started or joined a Web meeting, a Security Warning dialog box may appear and ask if you want to install client software. Click **Yes** and wait for a few moments while the software is set up.

   A message may also appear indicating that you are going to an outside site. To continue, click **Yes**.

   The meeting window opens.
3. For help using the meeting window, click **Help** > **Contents**.
4. When you're ready to leave the meeting, choose **File** > **Leave Meeting** in the meeting window. For more information on leaving and ending meetings, see ***Leaving, Ending, and Closing a Meeting***.

Leaving, Ending, and Closing a Meeting

Overview

When you, a meeting attendee who is not the host, leave a meeting, the meeting window closes so you no longer see the exchanges that take place between the remaining attendees. But unless the host ends the meeting, the meeting is still In Progress and the remaining attendees can continue their exchanges. Until the meeting host closes or ends the meeting, anyone can rejoin a meeting after leaving it.

If you are the meeting host, you cannot leave a meeting unless you assign a new host or end the meeting. If you assign a new host, then you become a standard attendee and can leave without ending the meeting. Only the current meeting host can end a Web meeting. When a meeting ends, the meeting attendees can no longer communicate through the meeting window.

When the original meeting host (the person who scheduled the meeting) leaves a meeting either by assigning a new host or ending the meeting, Team Central asks if the meeting should be closed. Closing a meeting, which is not the same as ending a meeting, means that no new attendees can join the meeting. As the meeting host, when you end a meeting, you should always close the meeting so no one tries to join a meeting that has ended.

But when you leave a meeting by assigning a new host, you might not want to close the meeting because there may still be attendees who need to join. Or you might want to close the meeting to prevent anyone else from joining. Closing a meeting that has not ended has no affect on the current participants. If you do not close the meeting when you leave it, you need to remember to close it when the meeting has ended or when you want to prevent people from joining the meeting.

Leaving a meeting

To leave a meeting for which you are an attendee (not a host)

1. In the meeting window, choose **File** > **Leave Meeting**.
2. Click **OK** to confirm that you want to leave.

   The meeting window closes and the system returns you to the Meetings page. As long as the meeting state is In Progress, you can rejoin the meeting by clicking the Join Meeting icon.

If you are the meeting host, you cannot leave the meeting unless you end it or assign someone else as a host.

To leave a meeting for which you are the host

1. In the meeting window, choose **Tools** > **Assign Host** and assign one of the participants as the host. If prompted, enter the host key that is displayed on the meeting window.
2. Choose **File** > **Leave Meeting**.
3. Click **OK** to confirm that you want to leave.

   The meeting window closes. If you are not the original meeting host, you are finished leaving the meeting. If you are the original meeting host (the meeting creator), the system asks if you want to close the meeting. Proceed to Step 4.
4. To let other attendees join, including letting people who leave the meeting rejoin, click **Cancel**. The system returns you to the Meetings page. The meeting state is still In Progress and the options to Join Meeting and Close Meeting are available.

   Or

   To prevent anyone else from joining, click **OK**. The system returns you to the Meetings page. The meeting state is now Complete.

   If an accidental promotion to the Complete state occurs, the meeting owner can demote the meeting back to the In Progress state. Attendees will not be removed from the meeting upon completion so that all have access to it.
5. If you didn’t close the meeting when you left it, remember to close it by clicking the **Close Meeting** icon when you no longer want people to join it or when it ends.

Ending a meeting

Only the current meeting host can end a meeting.

To end a meeting you are hosting

1. From the meeting window, choose **File** > **End Meeting**.
2. At the confirmation message, click **OK**.

   The meeting window closes. If you are not the original meeting host, you are finished ending the meeting. If you are the original meeting host (the meeting creator), the system asks if you want to close the meeting. Proceed to Step 3.
3. Click **OK**.

   The system returns you to the Meetings page. The meeting state is now Complete.

   If an accidental promotion to the Complete state occurs, the meeting owner can demote the meeting back to the In Progress state. Attendees will not be removed from the meeting upon completion so that all have access to it.

Closing a meeting

Use this procedure to close a meeting that you did not close when you first left the meeting. Only the original meeting host can close a meeting.

To close a meeting for which you are the original host (meeting creator)

- From the Meetings page, click the **Close Meeting** icon.

  The meeting state is now Complete and no one can join the meeting, even if it has not yet ended.

Deleting a Meeting

You may want to delete meetings that get canceled so they no longer appear on the meetings list for attendees. To clean up your list of meetings, you may also want to delete completed meetings that you scheduled. Note that completed meetings do not appear on the meetings list for standard meeting attendees so there is no need to delete them to clean up their lists.

To delete a meeting, the meeting must:

- be one that you created
- have a state of either Scheduled or Completed but not In Progress

To delete a meeting

1. Click **My Desk** > **Team** > **Meetings**.

   Or

   From the category list for the meeting's workspace, click **Meetings**.
2. Check the meeting you want to delete.
3. Click **Delete Selected** from the page Actions menu.
4. At the confirmation message, click **OK**.

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