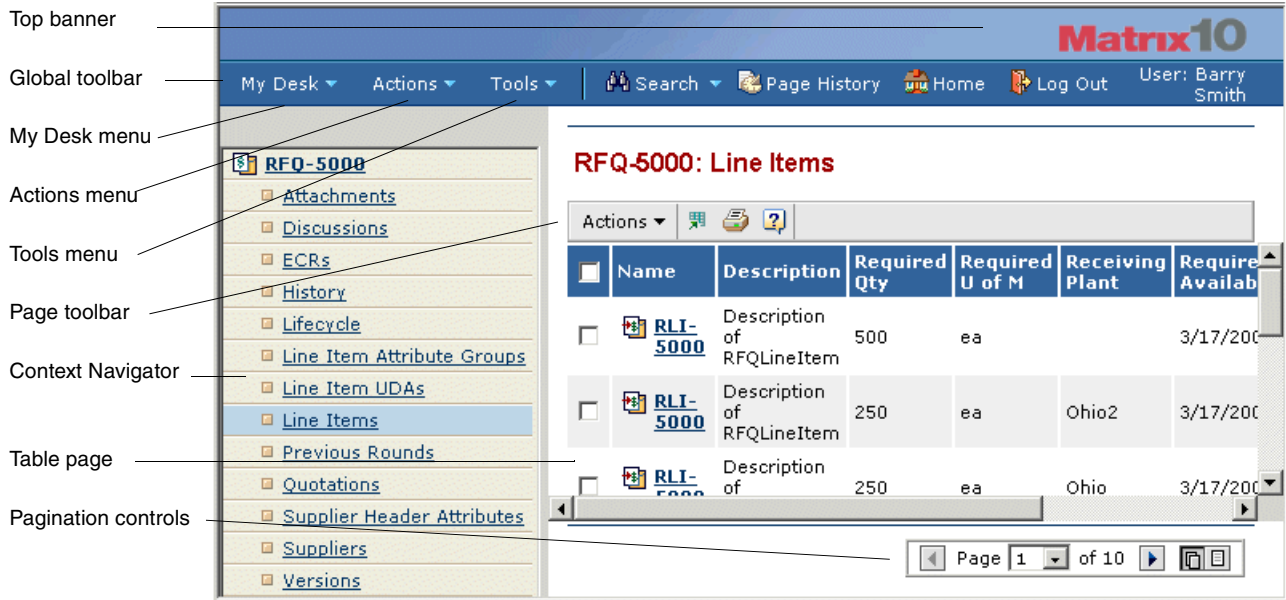



# Overview of the MatrixOne Applications Window




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



## Global Toolbar

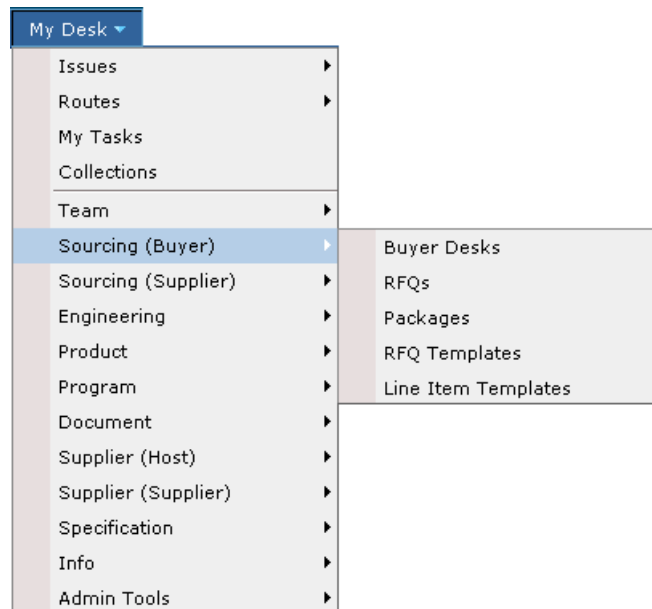
The global toolbar shown at the top of MatrixOne applications contains tools that are independent of the page or option you are currently working with. It holds top-level menu items: the My Desk, Actions, and Tools menus, which have drop downs; and Search, Page History, Home and Logout buttons. The following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

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

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

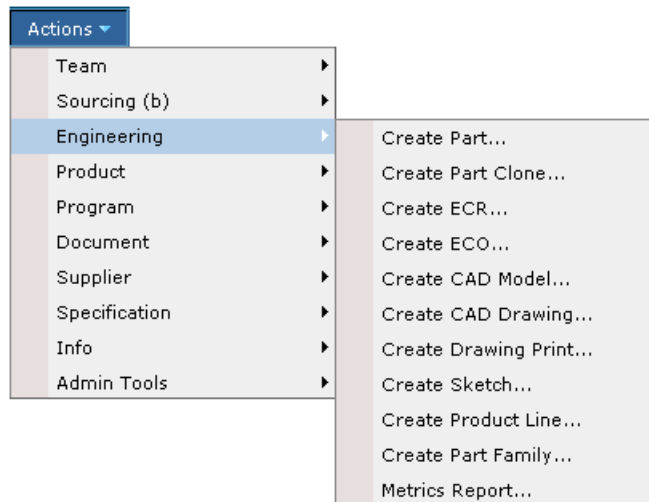
## My Desk Menu

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



## Actions Menu

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










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

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

## Tools Menu

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

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

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

## Table Pages

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

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






## Context Navigator

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

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

## Page Toolbar

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

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

## Using Home PowerView

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

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

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

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

### To access the Home PowerView page

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

*Or*

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

**Matrix10**

My Desk ▾ Tools ▾ Shortcuts ▾ Search Home Log Out

### PowerView

Actions ▾

My Collections Technical Specifi... Specification Tem... SCOs

Actions ▾

Name	Count
Collection-5000	11
My Workspace	24
Parts 2000	200
Parts 3000	8
Parts and ECRs for Alpha Project	8


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Tasks Routes

Actions ▾

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

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