1

Profile Management

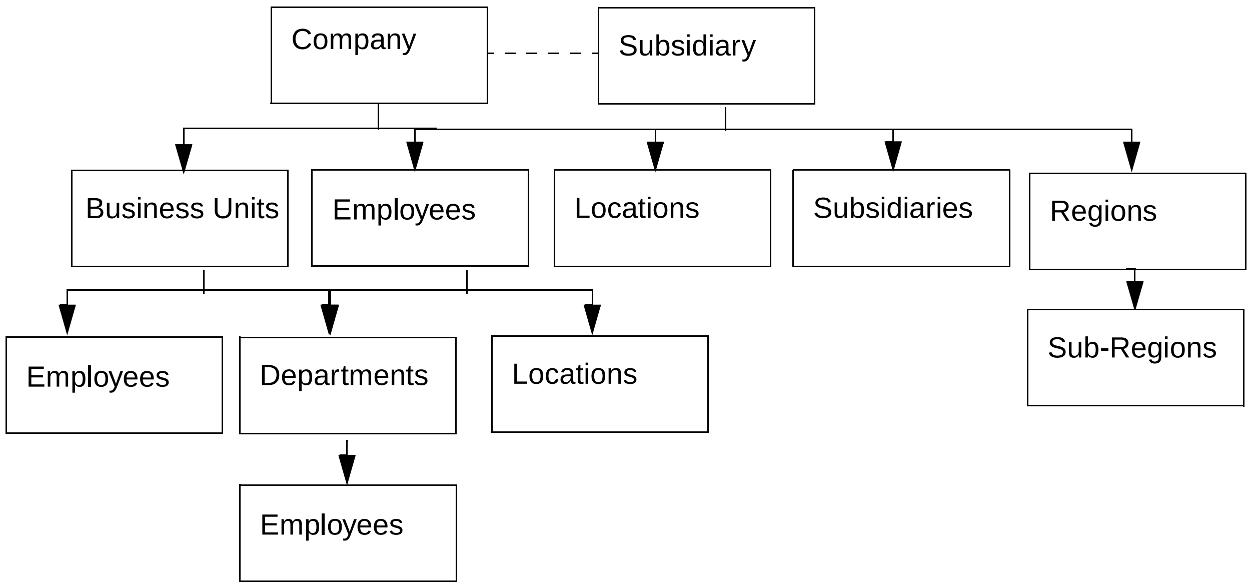
Profile Management Overview

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

There are four types of organizations:

- company
- subsidiary
- business unit
- department

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



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

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

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

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

Creating a Company, Subsidiary, Business Unit, or Department

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

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

1. Click **Tools** > **Administration > Companies**. (Only users defined in the role of Organization Manager will see this link on the Tools menu.)
2. Access the Create page using one of the following methods:

   If you are creating a new company:

   - Select **Create New** from the page Actions menu.

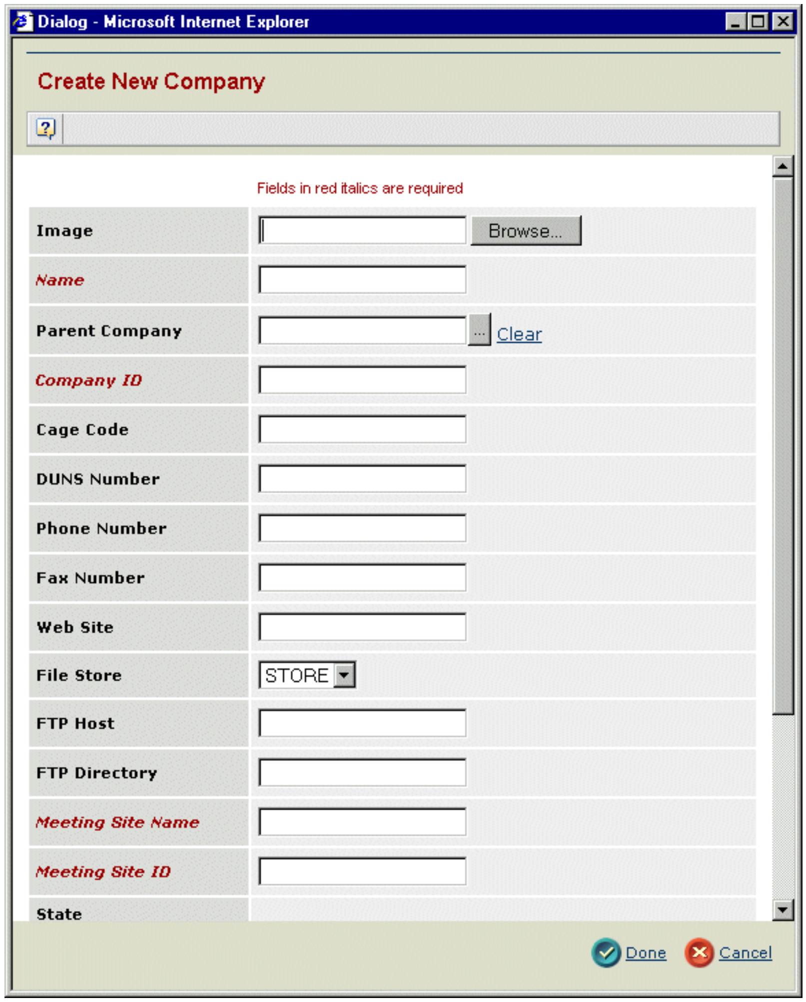
   If you are creating a new business unit, subsidiary, or department:

   a) Click a company name to access the Properties page and category list for the parent company that you want to create a business unit, subsidiary, or department for. See ***Viewing Information for a Company***.

   b) From the category list of the parent company, click **Business Units, Subsidiaries**, or **Departments**.

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

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



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

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

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

Parent Company. The name of the parent company. Clicking the ellipse button allows you to select the parent company. This attribute pertains only to a Company or Subsidiary.

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

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

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

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

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

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

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

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

FTP Directory. The directory for the FTP site.

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

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

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

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

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

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

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

Viewing History for a Company, Subsidiary, Business Unit, or Department

You can view the history of a company, including the type of action performed and the user who performed the action. Viewing history allows you to review the activities of users working with the company, such as adding new organization units, updates to user profiles, and the like.

History is displayed for ???????

To view history

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

   The Administration: Companies page opens.

2. Select the company that you want to view history for.

   The company category list and Properties page opens.

3. Click **History** in the category list.

Company-5000: History

Action Type: * ... and * Filter

Date	User	Action	Action Details	State	Message
Mon Jul 29, 2002 11:12:58 AM EDT	Smith, David	connect	Documents from Feature VCP Icon Mail URL 0 -	Revised	Information
Sun Jul 28, 2002 10:12:25 AM EDT	Harris, George	modify	Originator: Test Everything was:	Pending	Additional information
Sat Jul 27, 2002 11:12:57 AM EDT	Greene, Linda	modify	Quote Requested By Date: 07/05/2002 09:00:00 AM was:	Pending	More addition information
Fri Jul 26, 2002 9:12:05 AM EDT	Palin, Alexander	modify	Attribute Filter: attribute_PurchaseDecision~R;attribute_DefaultResponses~R; attribute_AnnualPartQuantity~R;attribute_ProductionPurpose~R; was:	Pending	Pending
Thu Jul 25, 2002 11:12:5 AM EDT	Hubble, Harry	modify	Comments: This is a test RFQ was:	Pending	
Wed Jul 24, 2002 8:12:15 AM EDT	Linski, Lou	connect	Documents from Feature VCP Task Route	Revised	
Tue Jul 23, 2002 7:12:25 AM EDT	Wainson, Wendy	modify	Comments: This is a test User Requirement was:	Pending	
Mon Jul 22, 2002 6:12:35 AM EDT	Harris, George	modify	Comments: Annother User Requirement test was:	Pending	Additional information

To refine the history listing, at the top of the page select an **Action Type** and ????????

The History page contains the following columns:

Date. The date on which the action was performed.

User. The user who performed the action.

Action. The action performed. Actions include Connect, Create, Disconnect, Modify, Promote, and Revise.

Action Details. Detailed description of the action.

State. The current status of the object, for example, Revised or Pending.

Message. Any message associated with the history event.

Maintaining Company Information

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

The following topics are covered:

Viewing a List of Companies

Viewing Information for a Company

Editing Details About a Company

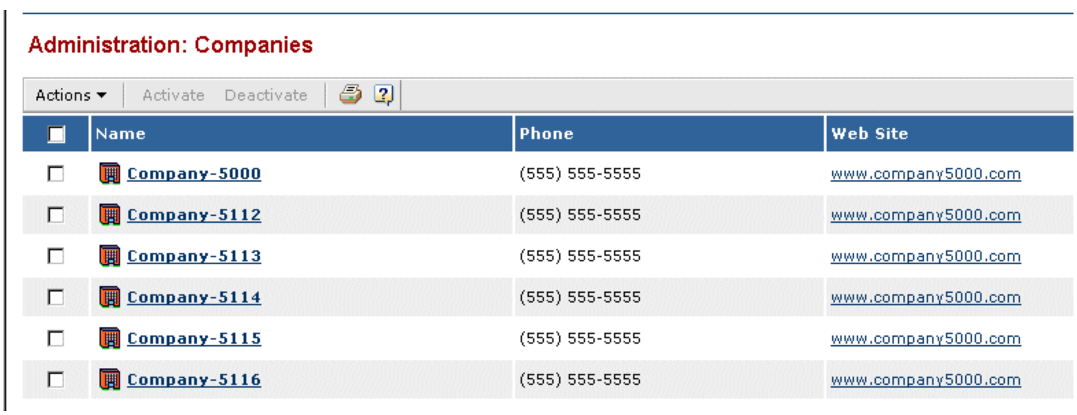
Viewing a List of Companies

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

To view a list of companies

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

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


Administration: Companies

Actions ▾ | Activate | Deactivate

	Name	Phone	Web Site
☐	Company-5000	(555) 555-5555	www.company5000.com
☐	Company-5112	(555) 555-5555	www.company5000.com
☐	Company-5113	(555) 555-5555	www.company5000.com
☐	Company-5114	(555) 555-5555	www.company5000.com
☐	Company-5115	(555) 555-5555	www.company5000.com
☐	Company-5116	(555) 555-5555	www.company5000.com

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

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

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

2. To add a Company to the database, click the Actions menu and select **Create New Company**. See *Creating a Company, Subsidiary, Business Unit, or Department.*

3. To view information about your company, click the company Name. See *Viewing Information for a Company*.

4. To delete companies from the database, click the check box for each company you want to delete and then click the Actions menu and select **Delete**. To select all companies in the list, click the check box in the column heading.

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

Viewing Information for a Company

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

To view information for a company

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

   The Administration: Companies page opens.

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

   Or

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

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

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

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

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

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

Editing Details About a Company

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

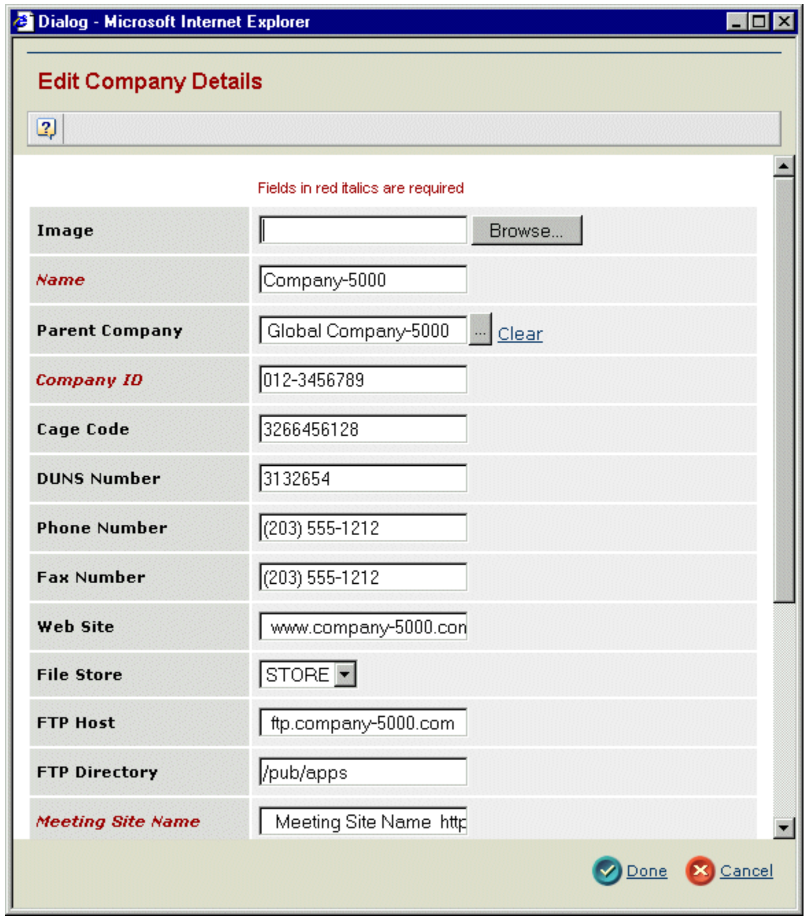
To edit details about a company

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

   The Administration: Companies page opens.

2. Click the **Name** of the company you want to edit. The category list and Properties page open for the selected company.

3. From the Properties page, click **Edit Details** from the page Actions menu.



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

Maintaining Subsidiary Information

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

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

The following topics are covered:

Viewing a List of Subsidiaries

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

To view a list of subsidiaries

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

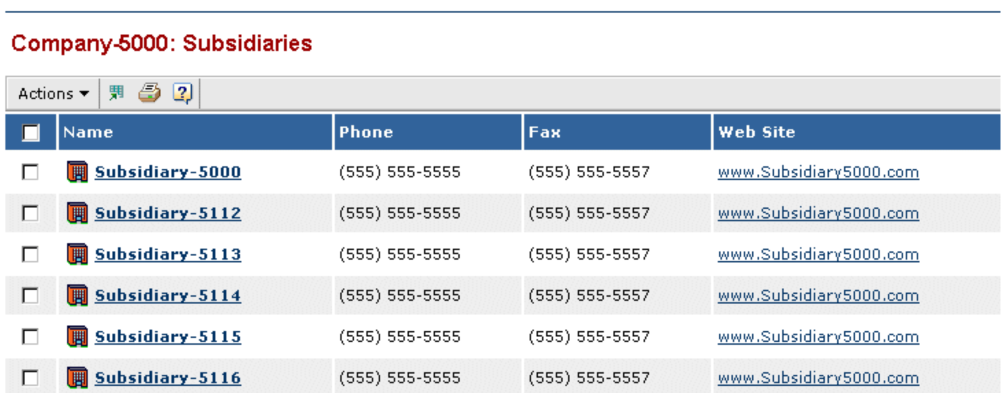
   The Administration: Companies page opens.

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

   The company category list and Properties page opens.

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

   The Subsidiaries page opens.



It contains the following columns:

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

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

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

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

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

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

Viewing Information for a Subsidiary

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

To view information for a subsidiary

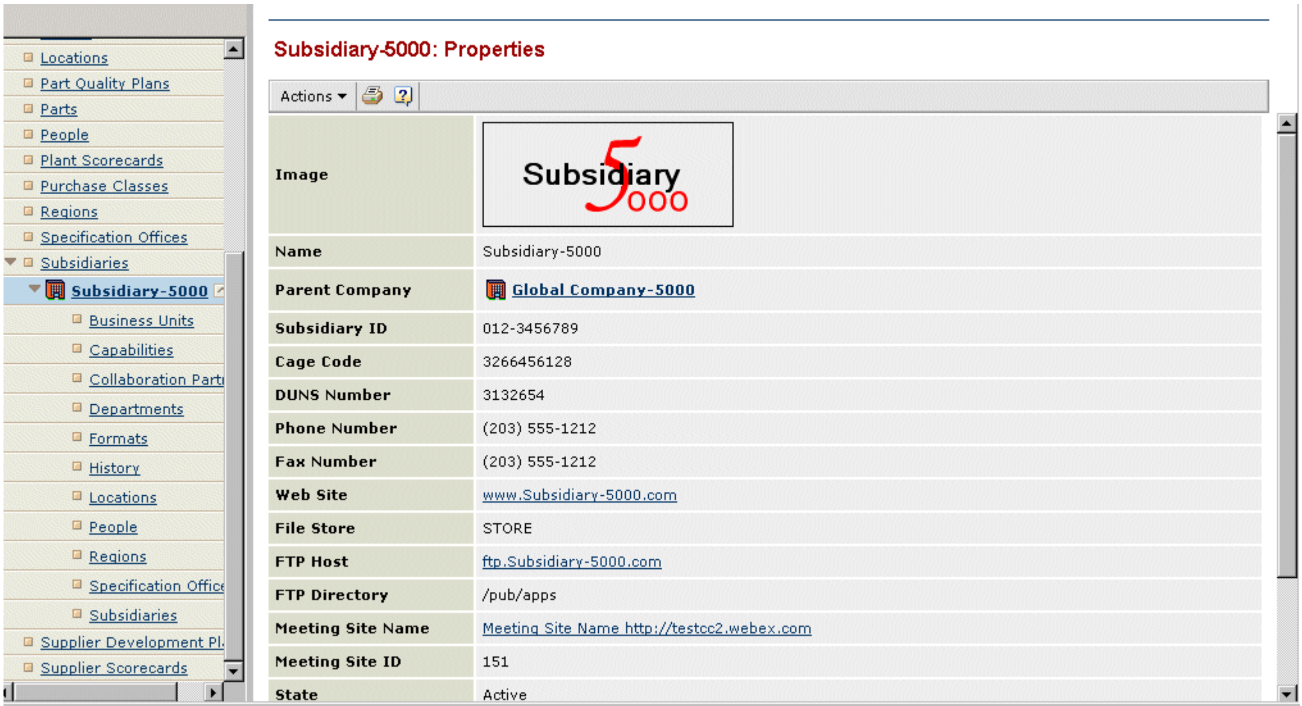
1. Click **Tools** > **Administration** > **Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)

   The Administration: Companies page opens.
2. Select the parent company that you want to view subsidiary information for.

   The company category list and Properties page opens.
3. From the company category list, click **Subsidiaries**.
4. From the list of subsidiaries, click the highlighted link in the Name column of the subsidiary you want to view, or click at the end of the row to view the Properties page in a new browser window.

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

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



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

5. To edit the properties listed, click **Edit Details** from the page Actions menu. See ***Editing Details About a Subsidiary***.

Use the category list to view additional information about the subsidiary:

Category	Description	For details, see:
Business Units	Lists the business units added for the subsidiary and lets you add and edit them.	***Viewing a List of Business Units***
Collaboration Partners	Shows a list of companies that are defined as collaboration partners for the subsidiary.	***Viewing a List of Collaboration Partners***
History	Shows a log of events that have occurred for the subsidiary.	***Viewing History for a Company, Subsidiary, Business Unit, or Department***
Location	Shows location details for the subsidiary.	***Viewing a List of Locations***
People	Provides access to definitions of people who work for the subsidiary.	***Viewing People in a Company***
Subsidiaries	Lists the subsidiaries added for the subsidiary and lets you add and edit them.	***Viewing a List of Subsidiaries***

Editing Details About a Subsidiary

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

To edit details about a subsidiary

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

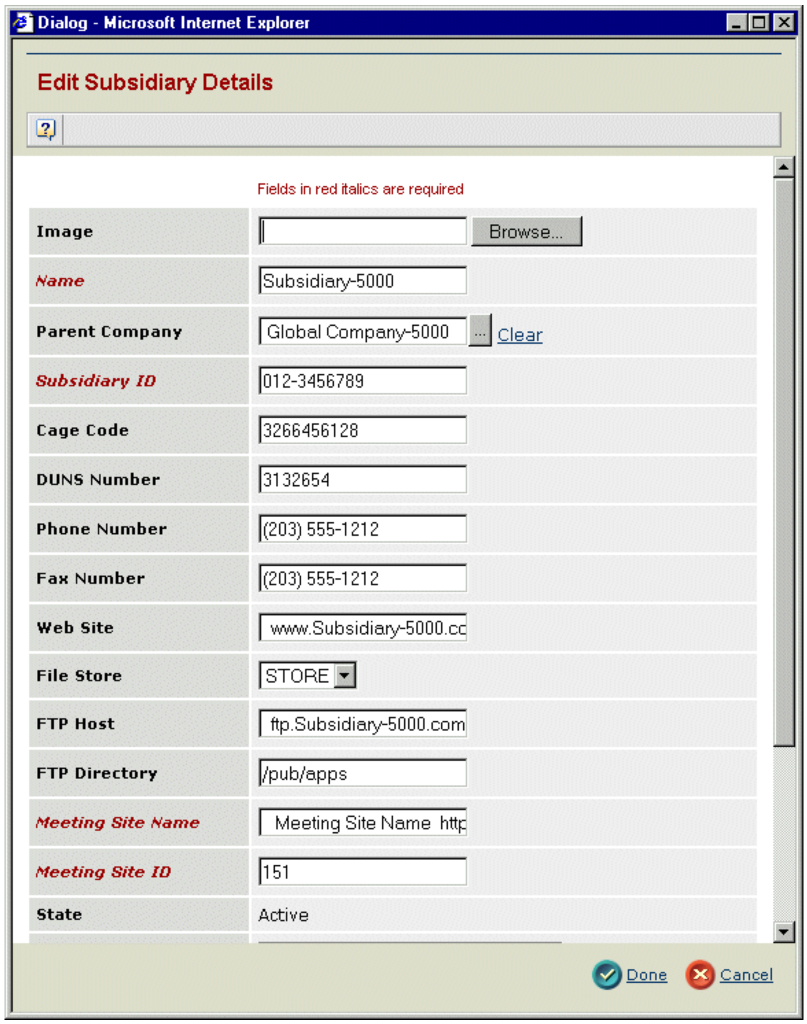
   The Administration: Companies page opens.

2. Click the **Name** of the parent company of the subsidiary. The category list and Properties page for the selected company opens.

3. From the Company category list, click **Subsidiary**.

4. Click the **Name** of the subsidiary you want to edit. The category list and Properties page for the selected subsidiary opens.

5. From the Properties page, click **Edit Details** from the page Actions menu.



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

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

Maintaining Business Unit Information

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

The following topics are covered:

Viewing a List of Business Units

Viewing Information for a Business Unit

Editing Details About a Business Unit

Viewing a List of Business Units

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

To view a list of business units

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

   The Administration: Companies page opens.

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

   The company category list and Properties page opens.

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

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

   The Business Units page opens.

It contains the following columns:

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

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

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

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

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

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

Viewing Information for a Business Unit

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

To view information for a business unit

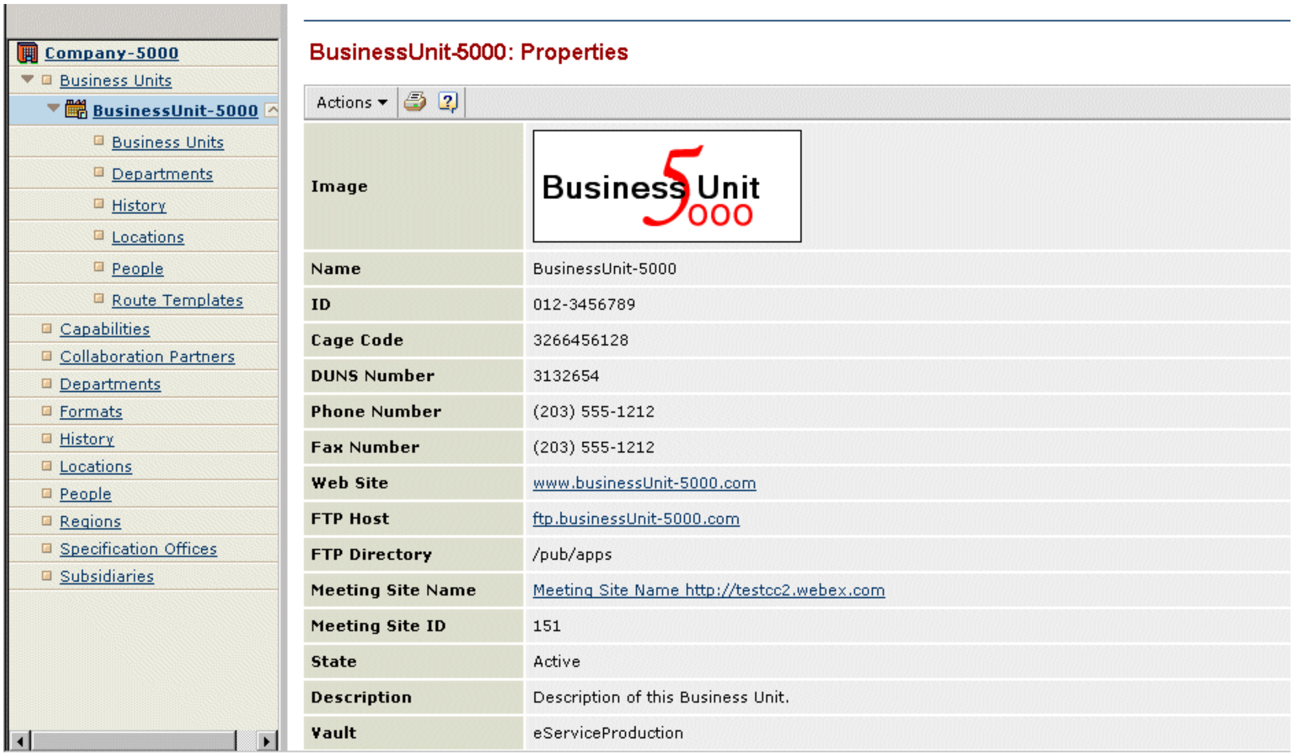
1. Click **Tools** > **Administration** > **Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)

   The Administration: Companies page opens.
2. Select the parent company that you want to view business unit information for.

   The company category list and Properties page opens.
3. From the company category list, click **Business Units**.

   (Subsidiaries can also have business units connected to them. If you want to view information about a business unit of a subsidiary, you need access the subsidiary under the company category list, then click **Business Units** from the subsidiary category list.)
4. From the list of business units, click the highlighted link in the Name column of the business unit you want to view, or click at the end of the row to view the Properties page in a new browser window.

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



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

5. To edit the properties listed, click **Edit Details** from the page Actions menu. See ***Editing Details About a Business Unit***.

6. Use the category list to view additional information about the business unit:

Category	Description	For details, see:
Business Units	Shows a list of business units for the business unit.	***Viewing a List of Business Units***
Departments	Shows a list of departments for the business unit.	***Viewing a List of Departments***
History	Shows a log of events that have occurred for the business unit.	***Viewing History for a Company, Subsidiary, Business Unit, or Department***
Location	Shows location details for the business unit.	***Viewing a List of Locations***
People	Provides access to definitions of people who work for the business unit.	***Viewing People in a Company***
Route Templates	Shows a list of route templates for the business unit.	????????

Editing Details About a Business Unit

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

To edit details about a business unit

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

   The Administration: Companies page opens.

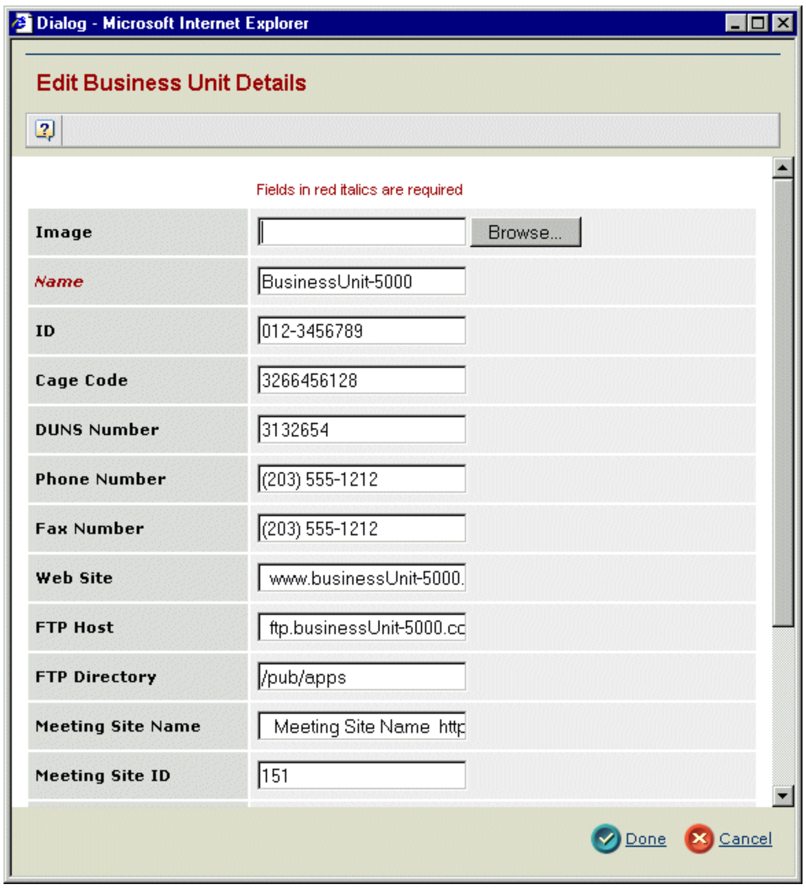
2. Click the **Name** of the parent company of the business unit. The category list and Properties page for the selected company opens.

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

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

4. Click the **Name** of the business unit you want to edit. The category list and Properties page for the selected business unit opens.

5. From the Properties page, click **Edit Details** from the page Actions menu.



6. Use the Edit Business Unit Details page to make changes. For details on specific fields, see ***Creating a Company, Subsidiary, Business Unit, or Department.***

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

Maintaining Department Information

A department is a sub unit of a business unit.

The following topics are covered:

Viewing a List of Departments

Viewing Information for a Department

Editing Details About a Department

Viewing a List of Departments

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

To view a list of departments

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

   The Administration: Companies page opens.

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

   The company category list and Properties page opens.

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

   The Business Units page opens.

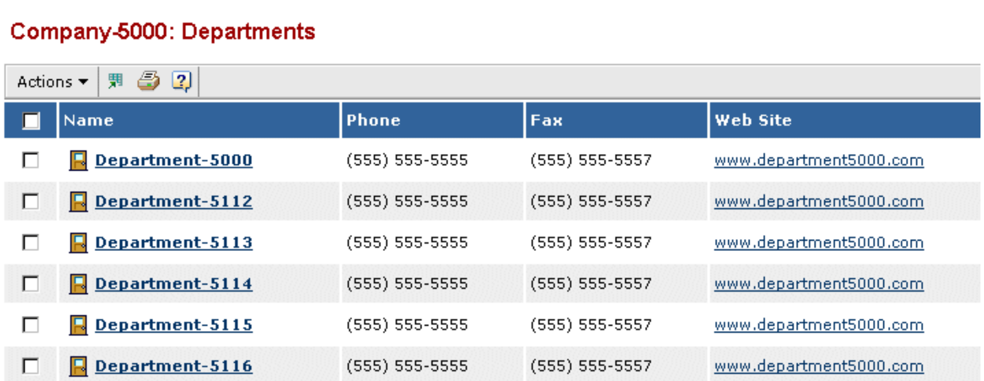
   (Subsidiaries can also have business units connected to them. If you want to view information about a business unit of a subsidiary, you need access the subsidiary under the company category list, then click **Business Units** from the subsidiary category list.)

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

   The Business Unit category list and Properties page opens.

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

   The Departments page opens.


Company-5000: Departments

Actions

	Name	Phone	Fax	Web Site
	Department-5000	(555) 555-5555	(555) 555-5557	www.department5000.com
	Department-5112	(555) 555-5555	(555) 555-5557	www.department5000.com
	Department-5113	(555) 555-5555	(555) 555-5557	www.department5000.com
	Department-5114	(555) 555-5555	(555) 555-5557	www.department5000.com
	Department-5115	(555) 555-5555	(555) 555-5557	www.department5000.com
	Department-5116	(555) 555-5555	(555) 555-5557	www.department5000.com

It contains the following columns:

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

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

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

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

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

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

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

Viewing Information for a Department

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

To view information for a department

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

   The Administration: Companies page opens.

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

   The company category list and Properties page opens.

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

   The Business Units page opens.

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

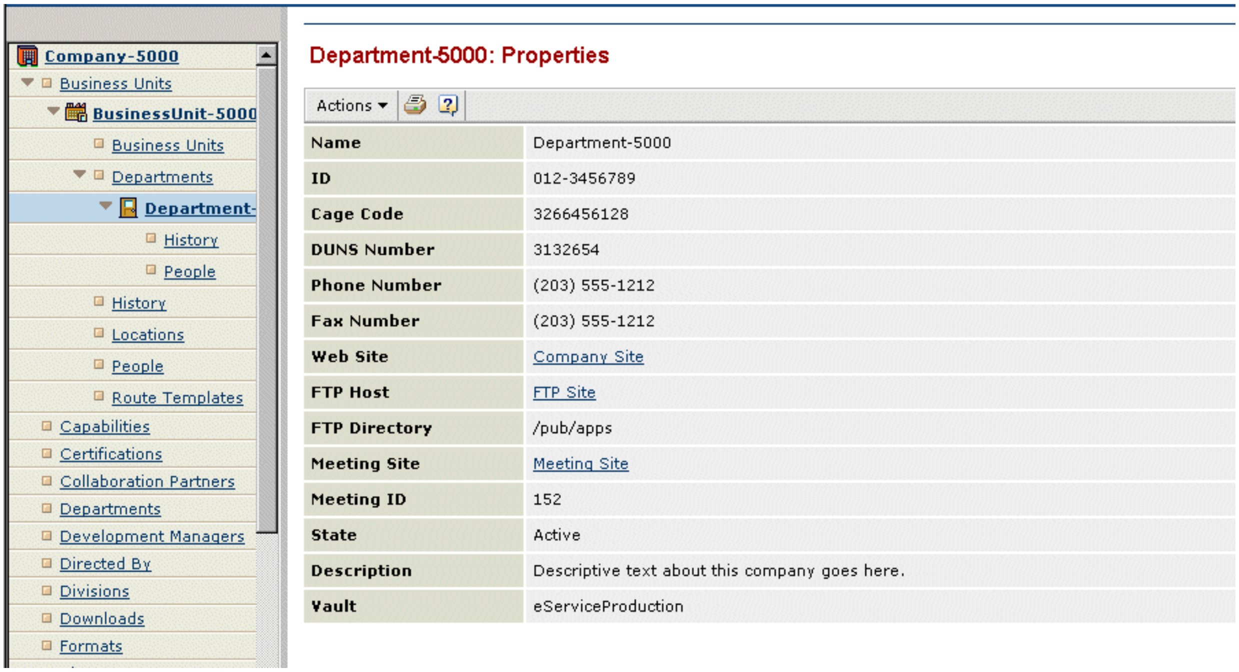
4. Click the name of the business unit that you want to view departments for.

   The Business Unit category list and Properties page opens.

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

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

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



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

7. To edit the properties listed, click **Edit Details** from the page Actions menu. See ***Editing Details About a Department***.

8. Use the category list to view additional information about the department:

Category	Description	For details, see:
History	Shows a log of events that have occurred for the business unit.	***Viewing History for a Company, Subsidiary, Business Unit, or Department***
People	Provides access to definitions of people who work for the business unit.	***Viewing People in a Company***

Editing Details About a Department

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

To edit details about a department

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

   The Administration: Companies page opens.

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

   The company category list and Properties page opens.

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

   The Business Units page opens.

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

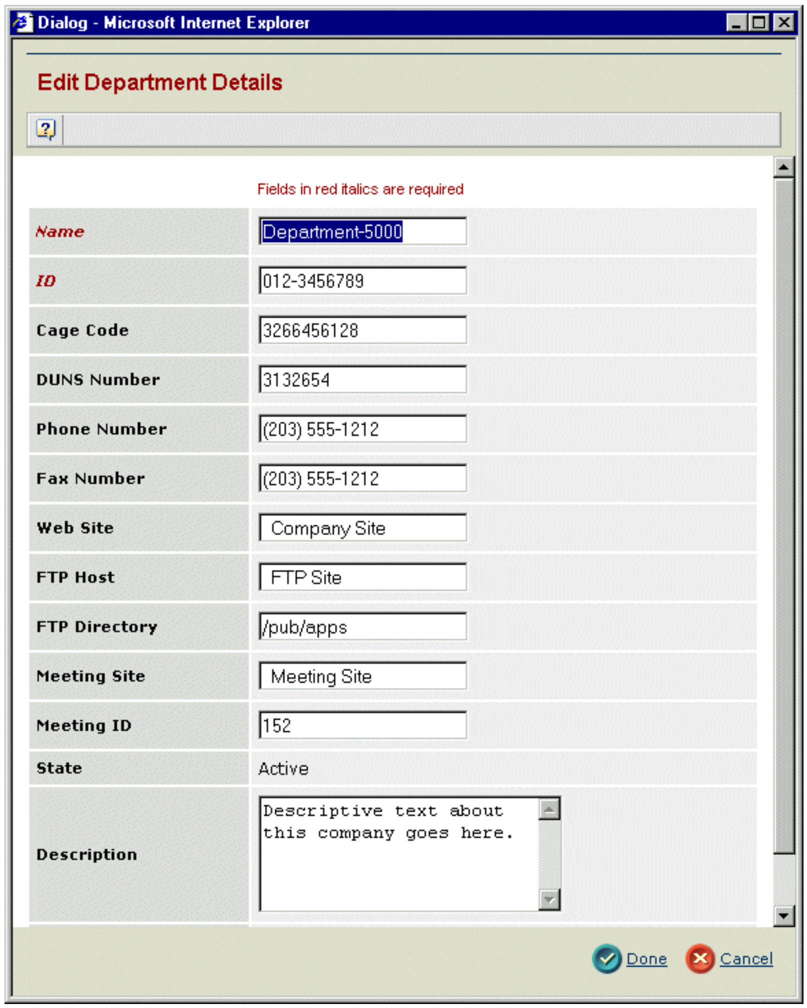
   The Business Unit category list and Properties page opens.

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

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

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

7. From the Properties page, click **Edit Details** from the page Actions menu.



8. Use the Edit Department Details page to make changes. For details on specific fields, see ***Creating a Company, Subsidiary, Business Unit, or Department.***

9. You can activate or deactivate the department by clicking the Active or Inactive **Status** button. If you change the status of a parent (business unit, company, or subsidiary) to inactive, you should also make the department inactive.

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

Maintaining Location Information

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

The following topics are covered:

Viewing a List of Locations

Creating a Location

Viewing Information for a Location

Viewing a List of Locations

To view locations for an organization

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

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

Company-5000: Locations

Actions

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

2. To add a location to the database, click **Create New** from the page Actions menu. See *Creating a Location.*

3. To delete locations from the database, click the check box for each location you want to delete and click **Delete** from the page Actions menu. To select all locations in the list, click the check box in the column heading.

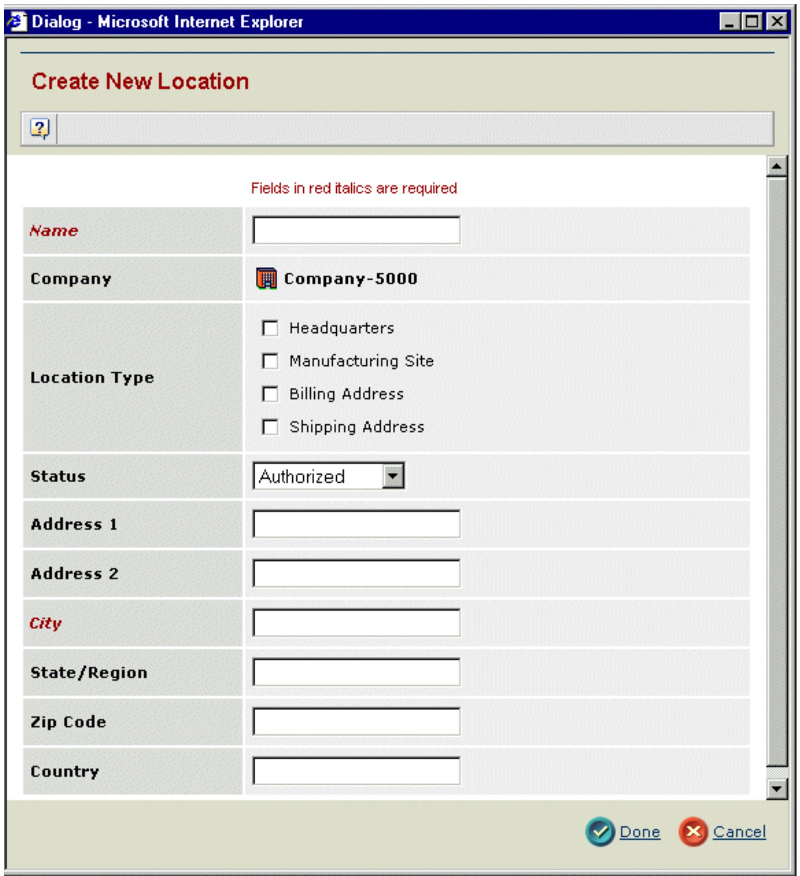
   A message is displayed, asking you to confirm that you want to delete the item(s) from the database. Click **Yes** to confirm the deletion or click **No** if you want the item(s) to remain in the database.

Creating a Location

To add a new location

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

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



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

   Name. Name of organization location. If there is more than one location, you may want to use a name that serves as a quick reminder of the location type, for example, “XYZ Inc. - Billing” or “XYZ Inc. - Headquarters”.

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

   Status - *** TO BE REMOVED--CHANGE THE MOCKUP****

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

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

   State/Region. Location state or region.

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

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

4. Click **Done**.

Viewing Information for a Location

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

To view information for a location

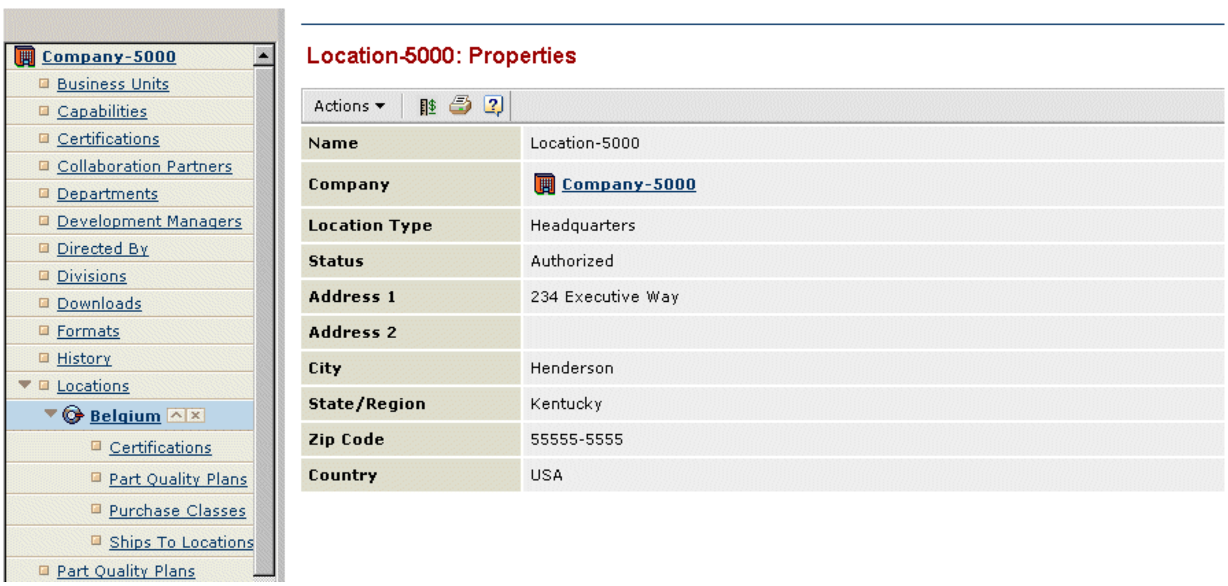
1. Click **Tools** > **Administration** > **Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)

   The Administration: Companies page opens.

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

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

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



   The Location Properties page contains details entered when the department was created or modified. For details on specific fields, see ***Creating a Location.***

4. To edit the properties listed, select **Edit Details** from the page Actions menu. See ***Editing Details About a Location***.

5. Use the category list to view additional information about the location:

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

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

Editing Details About a Location

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

To edit details about a location

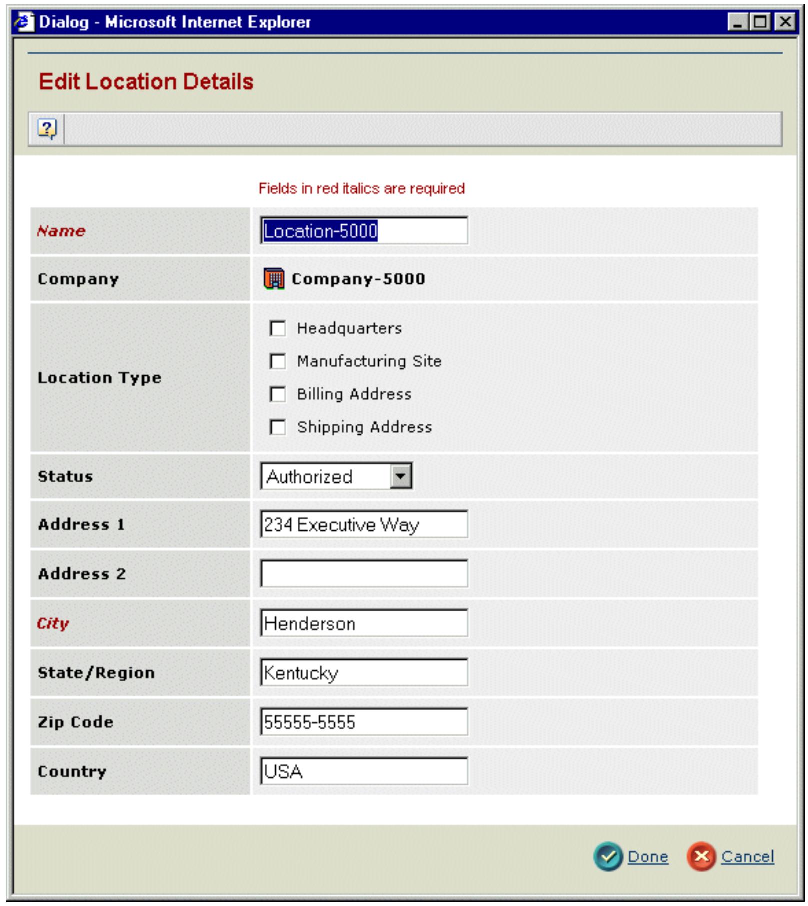
1. Click **Tools** > **Administration** > **Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)

   The Administration: Companies page opens.

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

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

4. From the Properties page, click **Edit Details** from the page Actions menu.



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

Maintaining Regions

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

The following topics are covered:

Viewing a List of Regions

Creating a Region

Viewing Information for a Region

Editing Details About a Region

Working with Sub-regions

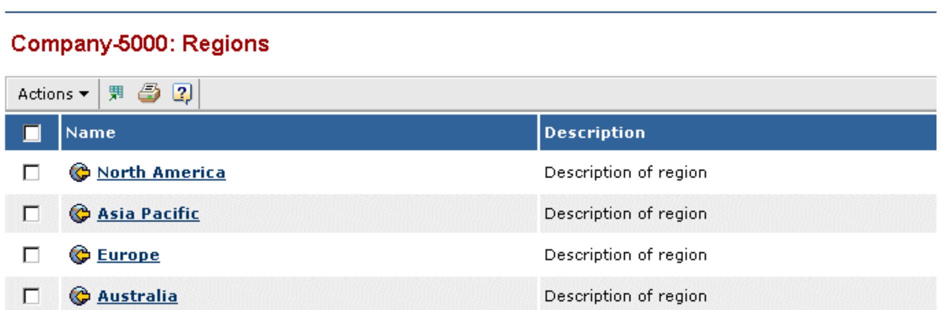
Viewing a List of Regions

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

To view a list of regions

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

   The Regions page opens.



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

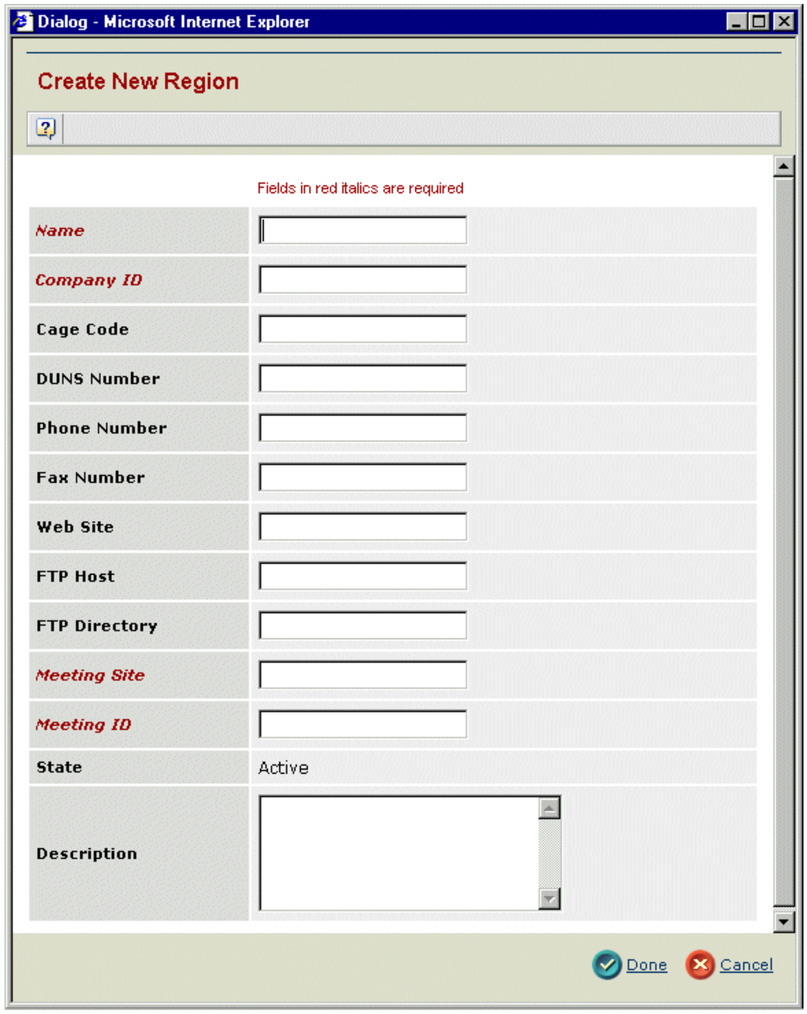
   A message is displayed, asking you to confirm that you want to delete the item(s) from the database. Click **Yes** to confirm the deletion or click **No** if you want the item(s) to remain in the database.

Creating a Region

To add a region

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

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



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

   Name. Name of region. Required.

   Company ID. ????? WHY NOT POPULATED? HOW DOES THIS WORK ????

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

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

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

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

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

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

   FTP Directory. The directory for the FTP site.

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

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

Description. A description of the region.

4. Click **Done**.

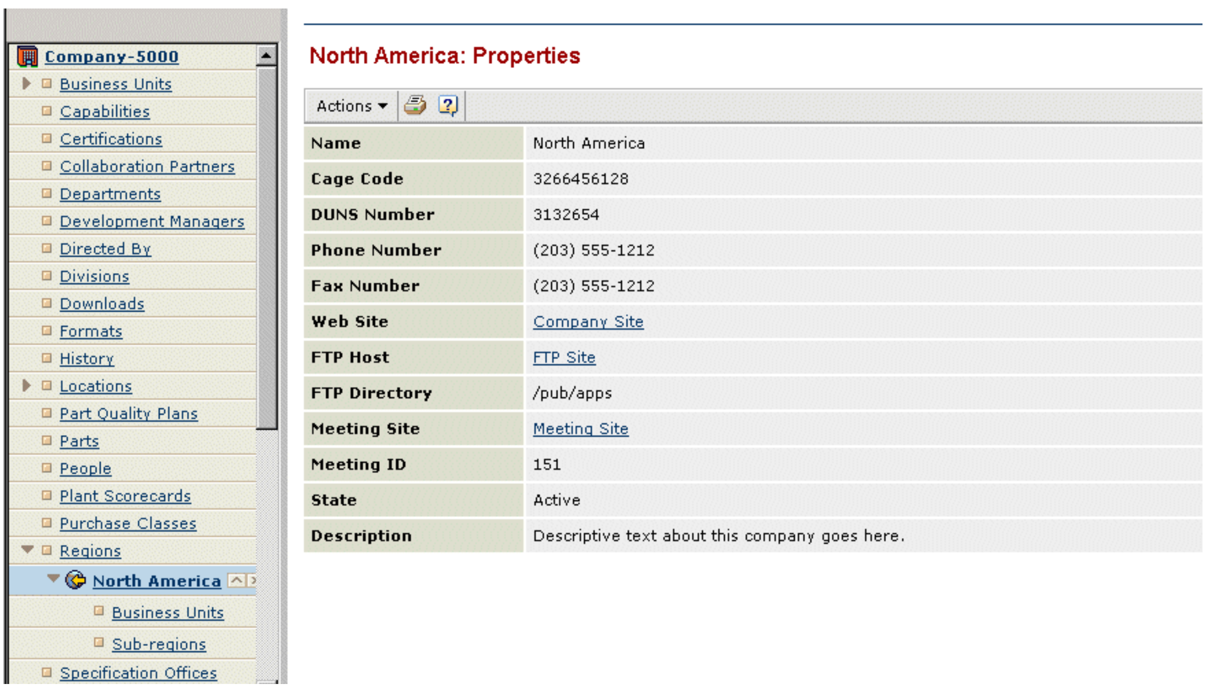
Viewing Information for a Region

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

To view information for a region

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

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



   The Properties page for a region contains details about the region. For details on specific fields, see *Creating a Region.*

4. To edit the properties listed, click **Edit Details** from the page Actions menu. See *Editing Details About a Region*.

5. Use the category list to view additional information about the region:

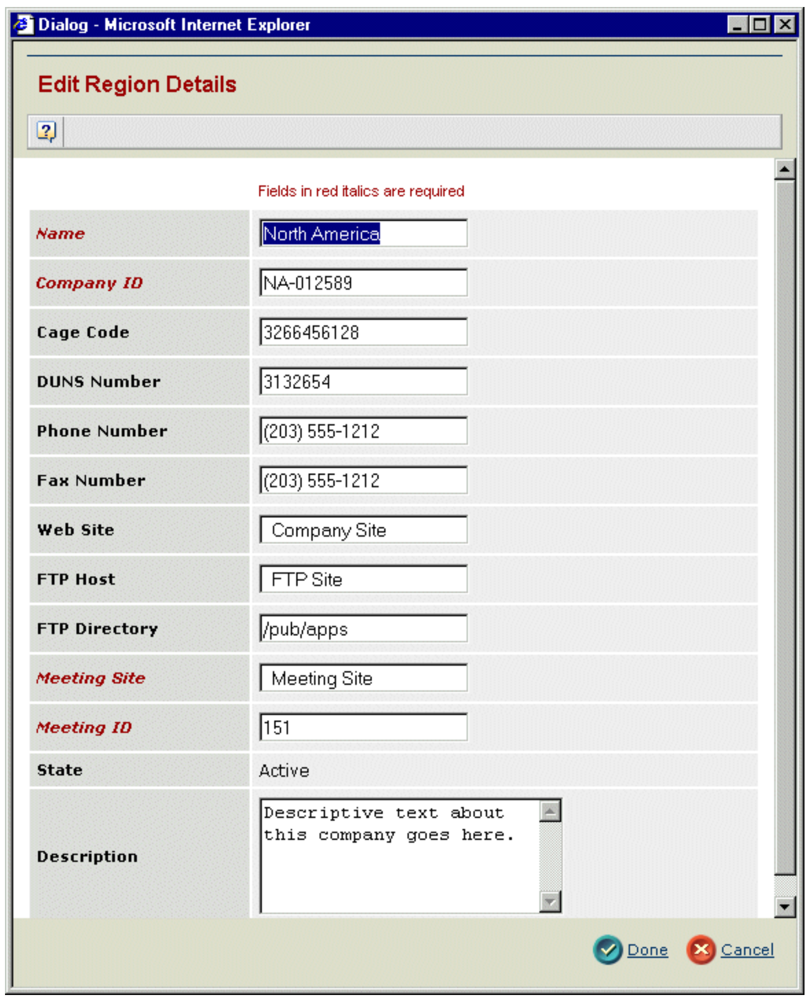
Category	Description	For details, see:
Business Units	To list business units for the region.	*Viewing a List of Business Units*
Sub-regions	To list any sub-regions defined for the region.	*Viewing a List of Regions*

Editing Details About a Region

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

To edit details about a region

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



5. Use the Edit Region Details page to make changes. For details on specific fields, see *Creating a Region.*

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

Working with Sub-regions

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

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

Viewing a List of Regions

Creating a Region

Viewing Information for a Region

Editing Details About a Region

Creating People Definitions

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

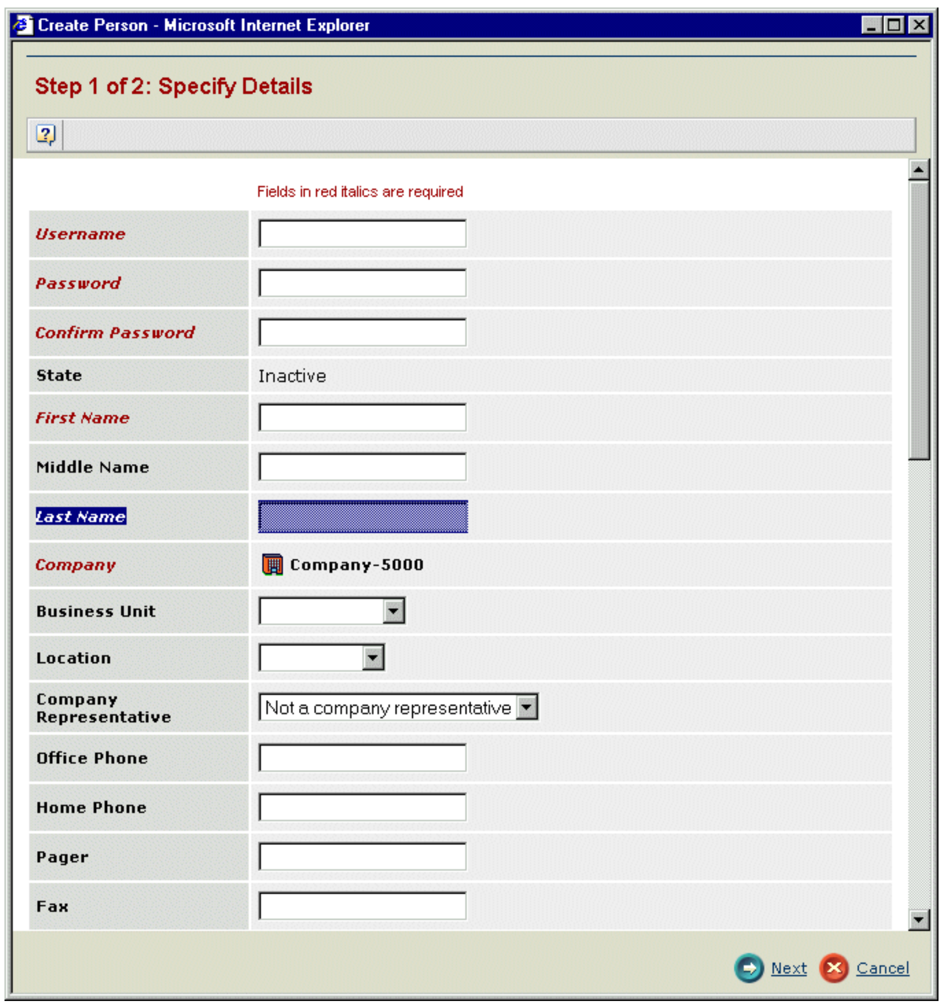
Some fields for adding a person are available only to particular applications.

To add a person

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

   Or

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

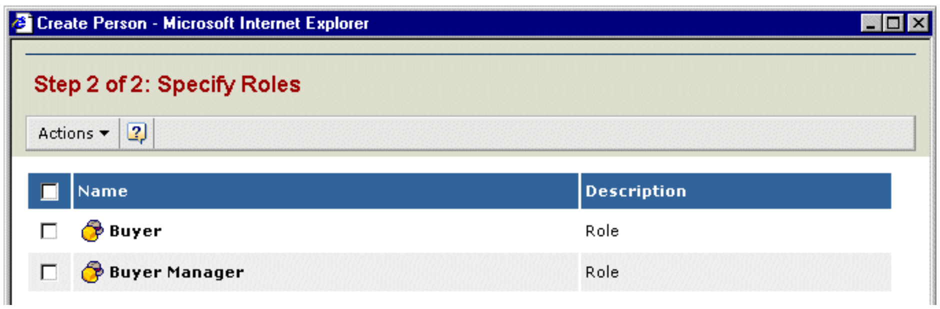


3. Enter the **Username** that the person will use to access the application(s). You can use whatever naming convention is standard for your company. For example, you may want to use the first letter of the person's first name followed by the last name (gwashington) or the first name followed by a period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

- To select the **Absence Delegate** who should be assigned tasks during the absence period, click and select the person. See ????????

15. If you want to use a **Vault** other than the default, click to specify where the person will access database objects. This field is displayed only if more than one vault is available to the context user.
16. Select a **Vault Search Preference**.
17. Select a **JT Viewer**.
18. Select a **Default Store**.
19. Click **Next**.

    The Roles page appears, where you can assign roles for the person.



20. Click the check box in the row for each role you want to assign for the person. You can click the check box in the column heading to select all roles.
21. Click **Done** to add the new person object to the database.

Maintaining People Information

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

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

The following topics are covered:

Viewing People in a Company

Adding Persons to a Company

Viewing Person Information

Editing Person Details

Viewing People in a Company

To view a list of people in a company

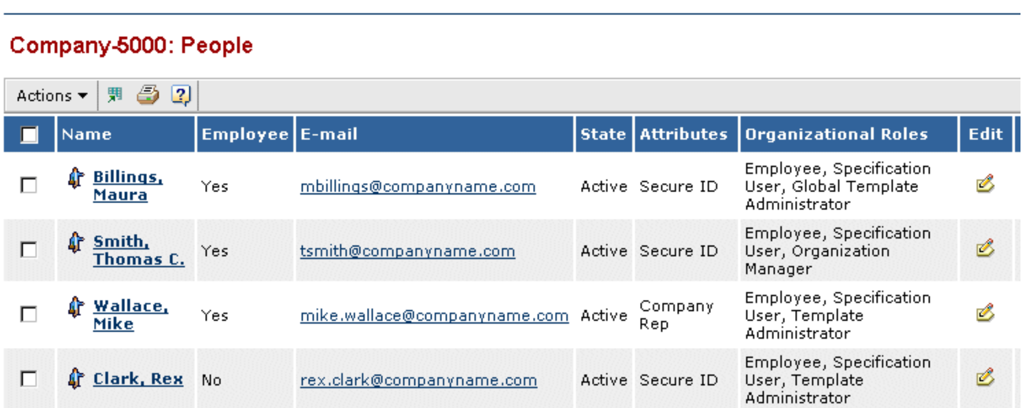
1. Click **Tools** > **Administration** > **Companies** to view a list of companies. (This link is available only for users defined in the role of Organization Manager.)

   The Administration: Companies page opens.

2. Click the name of the company where you want to view people.

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

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



   It contains the following columns:

   Name. Click any highlighted **Name** to view the Properties page for that person. See ***Viewing Person Information*** for details.

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

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

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

Attributes. The type of login access.

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

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

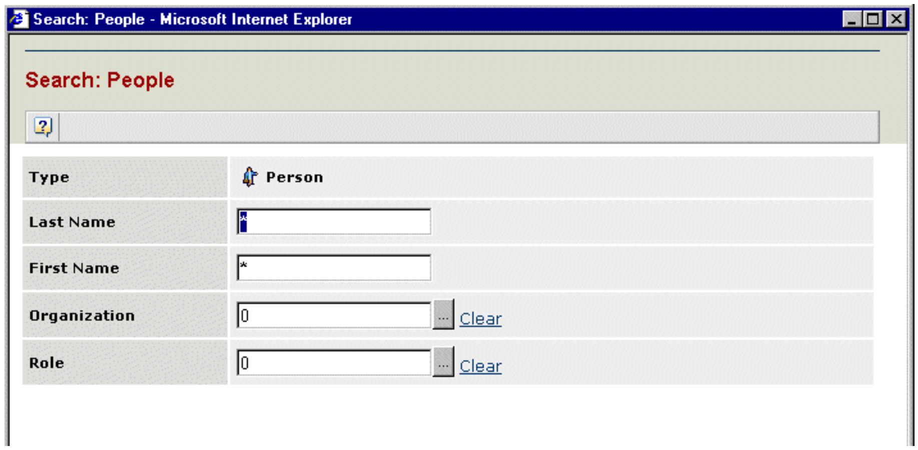
4. To add a new employee to the organization, click **Create New** from the page Actions menu. See ***Creating People Definitions*** for details.
5. The Administrator can add users to an organization and give them specific roles within that organization. Click **Add Existing** from the page Actions menu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

Adding Persons to a Company

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

To add a person to a company

1. Access the People page for the company where you want to add people. See ***To view a list of people in a company***.
2. Click **Add Existing** from the page Actions menu.



3. Enter search criteria if you want to limit the number of users returned in the search results. You can use wildcards. For example, to find all users whose last name starts with A, enter A* in the Last Name text box.
4. Click **Search**.

   For information about using the screens for a search, see ????????

Viewing Person Information

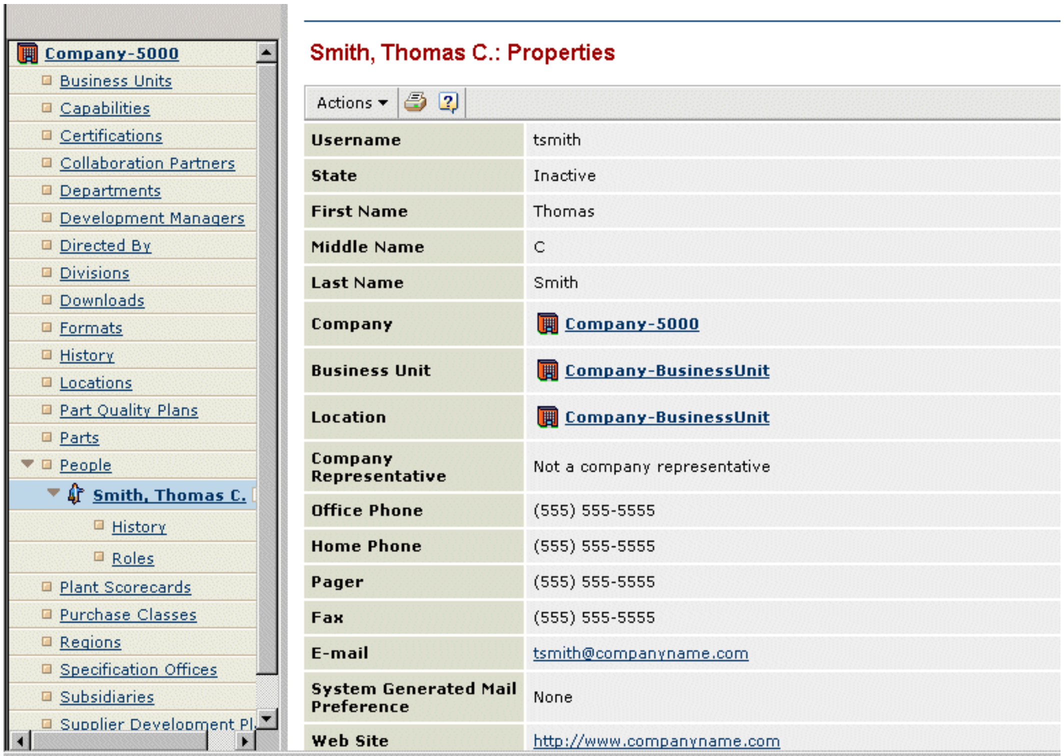
To view information for a person

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

   The Administration: Companies page opens.
2. Click the name of the company where you want to view information for a person, or click View my Company to view information for people in the company you represent.
3. From the company category list, click **People**.

   The list that is displayed shows all people currently defined in the database for that company.
4. Click any highlighted **Name** to view the Properties page for that person, or click at the end of the row to view the Properties page in a new browser window.

   The Properties page opens.



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

5. To edit the properties listed, including changing the owner or co-owner, click **Edit Details** from the page Actions menu. See ***Editing Person Details***.

6. To view or add roles for the context person, click **Roles** from the category list. See ***To add or change a person's roles*** for details.

Editing Person Details

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

To edit a person definition

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

   The Administration: Companies page opens.

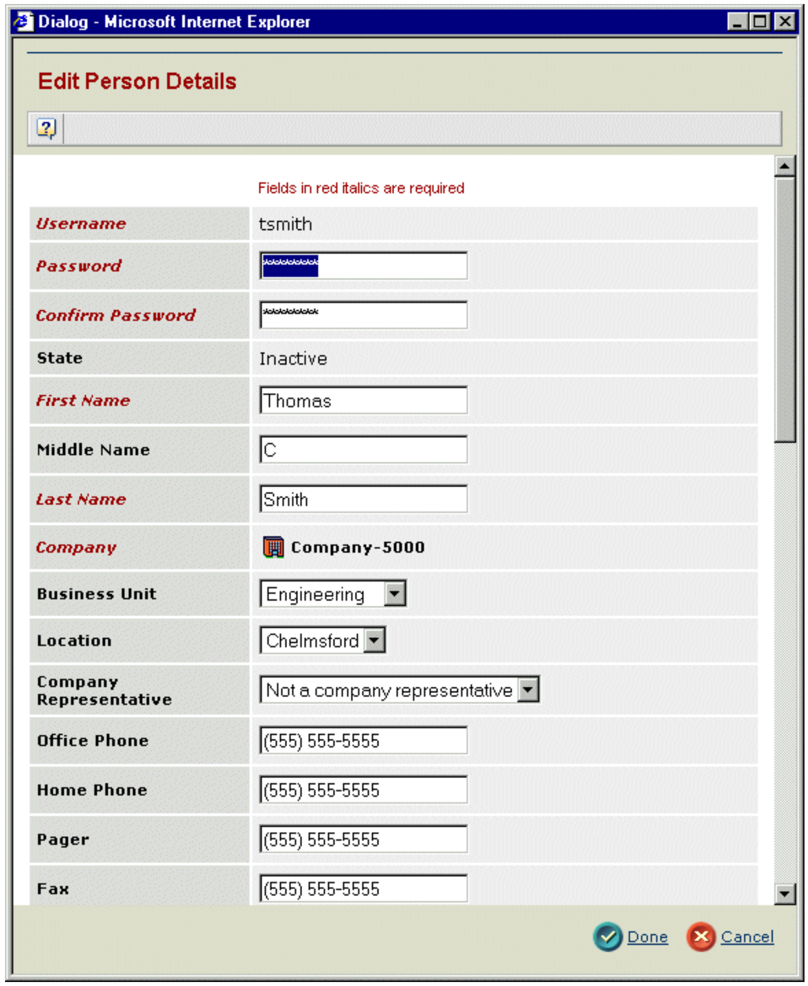
2. From the list of companies, click the highlighted link in the Name column of the company you want to view, or click at the end of the row to view the Properties page in a new browser window.

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

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

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

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



6. Make changes, as necessary. The following can be changed:
7. Modify password information:
   - Type the **Password** that the person will use to access the application(s). The password is case-sensitive.
   - Type the same password in the **Confirm Password** text box.
8. Modify Name information:
   - Type the person’s **First Name**.
   - Type the person’s **Middle Name**.
   - Type the person’s **Last Name**.
9. Modify Business Unit and Location information:
   - Select a **Business Unit** from the drop-down list.
   - Select a **Location** from the drop-down list.
10. Change the **Company Representative** status, if applicable.
11. Modify phone information, including any of the following:

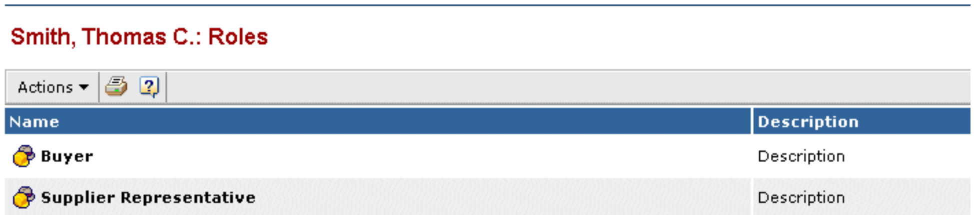
- **Office Phone**
- **Home Phone**
- **Pager**
- **Fax**

12. Modify network access information:
    - Add the person’s **Email Address**. This address appears on the People page and provides a direct link from that page to create a new email message for the person.
    - For system-generated e-mails, specify the language in **System Generated Mail Preference**.
    - Add the URL for the person’s **Web Site**, if one exists.
13. Change the person’s Organizational Roles.
14. Check whether the person’s **Login Type** is Standard or Secure ID.
15. Check whether or not the person can **Host Meetings**.
16. Change the person’s **Meeting Username**.
17. Modify address information, including any of the following:
    - **City**
    - **State/Region**
    - **Postal Code**
    - **Country**
18. Modify absentee information, including any of the following:
    - Click the calendar button and select the **Absence Start Date**.
    - Click the calendar button and select the **Absence End Date**. Required if the Absence Start Date is specified.
    - To select the **Absence Delegate** who should be assigned tasks during the absence period, click and select the person. See ????????
19. If you want to use a **Vault** other than the default, click to specify where the person will access database objects. This field is displayed only if more than one vault is available to the context user.
20. Select a **Vault Search Preference**.
21. Select a **JT Viewer**.
22. Select a **Default Store**.
23. Click **Done** to accept changes.

To add or change a person’s roles

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

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



2. To add role assignments for the context person, click **Add Existing** from the page Actions menu.

   The Search screen for Roles appears, allowing you to search for roles. For information about searching for roles, see ????????

3. To remove role assignments for the context person, click the check box in the row for each role assignment you want to remove and click **Remove** from the page Actions menu.

Maintaining Collaboration Partner Information

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

The following topics are covered:

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

Viewing a List of Collaboration Partners

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

To view a list of collaboration partners

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

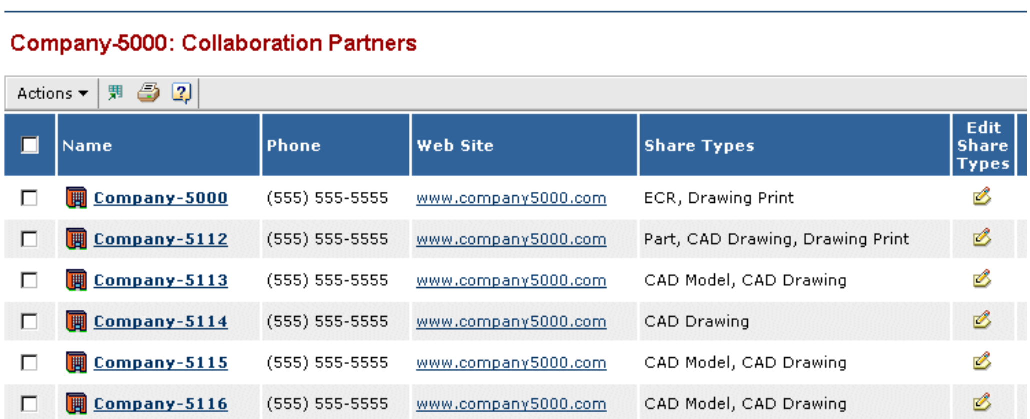
   The Administration: Companies page opens.

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

   The company category list and Properties page opens.

3. From the company category list, click **Collaboration Partners**.

   The Collaboration Partners page opens.


Company-5000: Collaboration Partners

Actions

	Name	Phone	Web Site	Share Types	Edit Share Types
	Company-5000	(555) 555-5555	www.company5000.com	ECR, Drawing Print	
	Company-5112	(555) 555-5555	www.company5000.com	Part, CAD Drawing, Drawing Print	
	Company-5113	(555) 555-5555	www.company5000.com	CAD Model, CAD Drawing	
	Company-5114	(555) 555-5555	www.company5000.com	CAD Drawing	
	Company-5115	(555) 555-5555	www.company5000.com	CAD Model, CAD Drawing	
	Company-5116	(555) 555-5555	www.company5000.com	CAD Model, CAD Drawing	

It contains the following columns:

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

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

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

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

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

4. To add a collaboration partner to the list, click **Add Existing**. See ***Adding Collaboration Partners***.

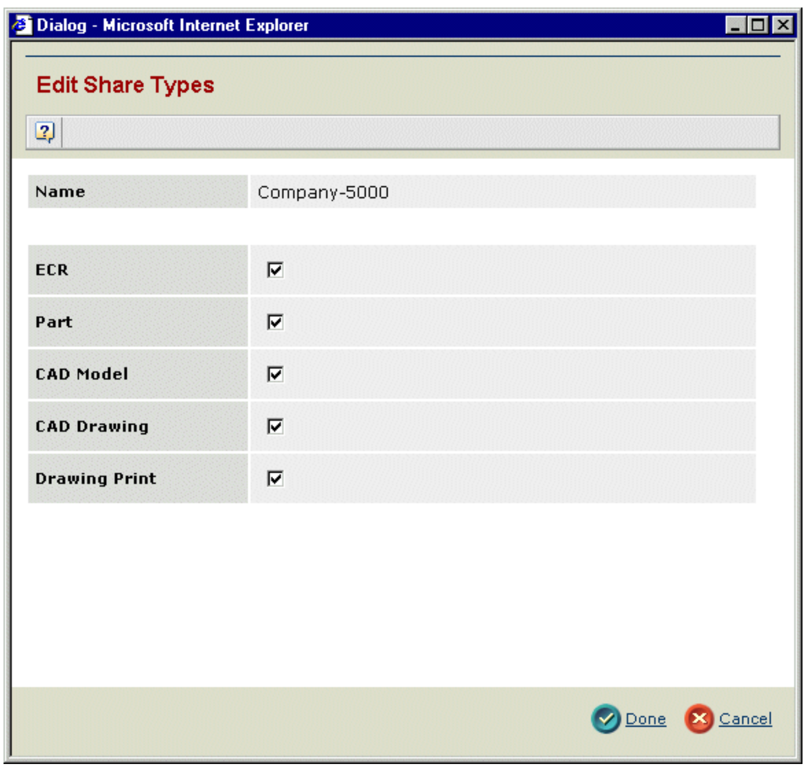
5. To remove collaboration partners from the list, click the check box for each collaboration partner you want to remove and click **Remove Selected** from the page Actions menu. To select all collaboration partners in the list, click the check box in the column heading.

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

Editing Share Types

To edit share types

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

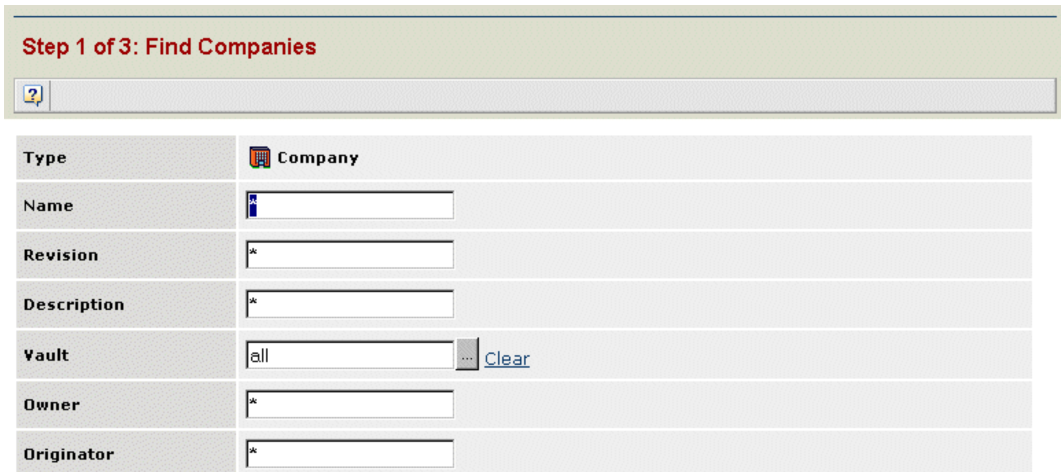


3. Check or uncheck boxes for the types you want to collaborate on with this partner.
4. Click **Done**.

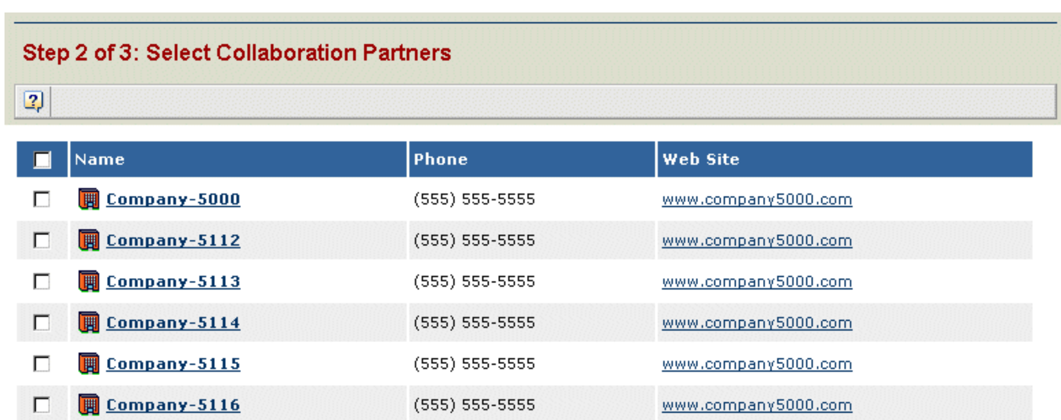
Adding Collaboration Partners

To add a collaboration partner

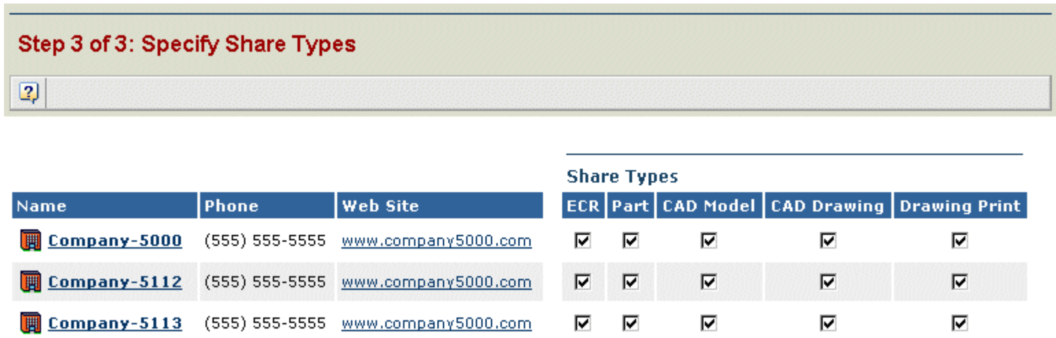
1. From the category list of the company, click **Collaboration Partners**.
2. From the Collaboration Partners page, click **Add Existing** from the page Actions menuto search for and select companies to add as collaboration partners. If the company has not yet been defined in the database, you must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



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



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


Step 3 of 3: Specify Share Types

Name	Phone	Web Site	ECR	Part	CAD Model	CAD Drawing	Drawing Print
			Share Types				
Company-5000	(555) 555-5555	www.company5000.com	☑	☑	☑	☑	☑
Company-5112	(555) 555-5555	www.company5000.com	☑	☑	☑	☑	☑
Company-5113	(555) 555-5555	www.company5000.com	☑	☑	☑	☑	☑

6. On the Specify Share Types page, click the check box for each object type that you want each organization to collaborate on. These types will be allowed to be created in the partner's vault.
7. Click **Done**.

   The organizations are added and the Collaboration Partners page is redisplayed showing additions.

Viewing Information for a Collaboration Partner

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

To view information for a collaboration partner

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

   The Administration: Companies page opens.
2. Select the parent company that you want to view collaboration partner information for.

   The company category list and Properties page opens.
3. From the company category list, click **Collaboration Partners**.
4. From the list of collaboration partners, click the highlighted link in the Name column of the collaboration partner you want to view, or click at the end of the row to view the Properties page in a new browser window.

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

   The Collaboration Partner Properties page contains details entered when the collaboration partner was created or modified. For details on specific fields, see ***Creating a Company, Subsidiary, Business Unit, or Department.***
5. To edit the properties listed, click **Edit Details** from the page Actions menu. See ***Editing Details About a Company***.

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

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

Editing Details About a Collaboration Partner

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

To edit details about a collaboration partner

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

   The Administration: Companies page opens.

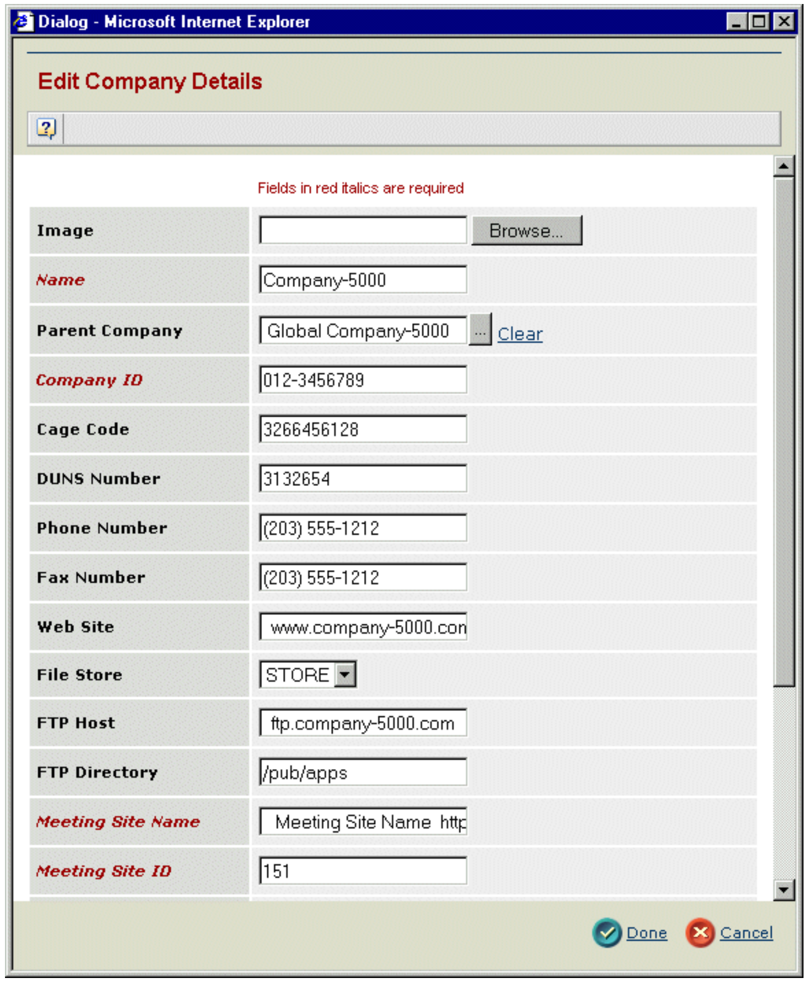
2. Click the **Name** of the parent company of the collaboration partner. The category list and Properties page opens for the selected company.

3. From the Company category list, click **Collaboration Partners**.

   (Collaboration partners can also have collaboration partners connected to them. If you want to view information about a partner of a partner, you need access the collaboration partners under the company category list, then click **Collaboration Partners** from the Collaboration Partner category list.)

4. Click the **Name** of the collaboration partner you want to edit. The category list and Properties page opens for the selected collaboration partner.

5. From the Properties page, click **Edit Details** from the page Actions menu.



6. Use the Edit Details page to make changes. For details on specific fields, see ***Creating a Company, Subsidiary, Business Unit, or Department.***

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

Maintaining Specification Offices

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

Specification Offices are available only for Specification Central.

The following topics are covered:

Viewing a List of Specification Offices

Creating a Specification Office

Viewing the Portal Page for a Specification Office

Editing Details of a Specification Office

Viewing a List of Specification Offices

To view a list of specification offices

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

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

   The Administration: Companies page opens.

2. Select a company by name.

3. From the category list, click **Specification Offices**.

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

Company-5000: Specification Offices

Actions

	Name	Assigned	Description	Status
	SpecOffice-5000	Yes	Description	Active
	SpecOffice-5001	Yes	Description	Active

4. To add a capability to the database, click **Create New** from the page Actions menu. See *Creating a Specification Office.*

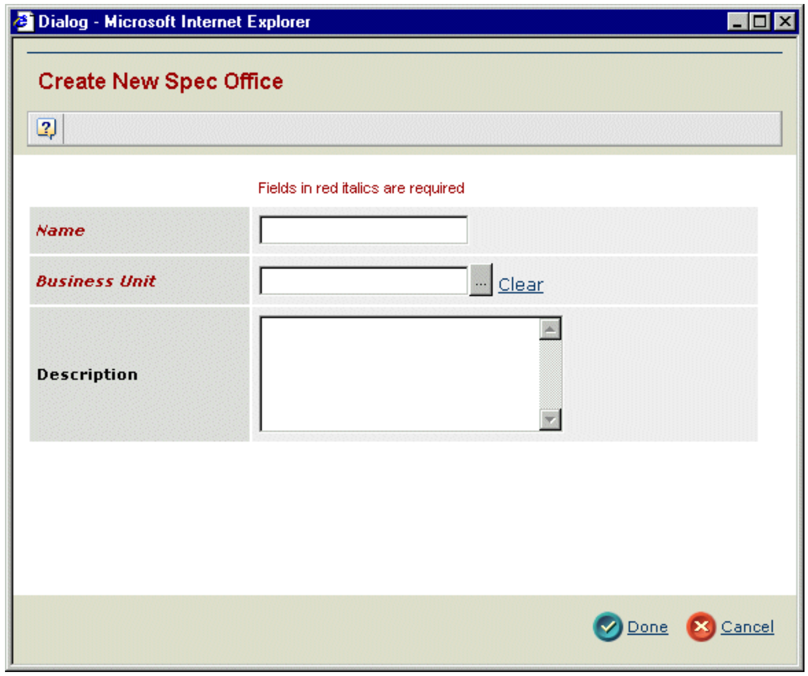
5. To delete specification offices from the selected company or subsidiary, click the check box for each office you want to delete and click **Delete** from the page Actions menu. To select all offices in the list, click the check box in the column heading.

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

Creating a Specification Office

To create a new specification office

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



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

   Name. Name of the specification office. Required.

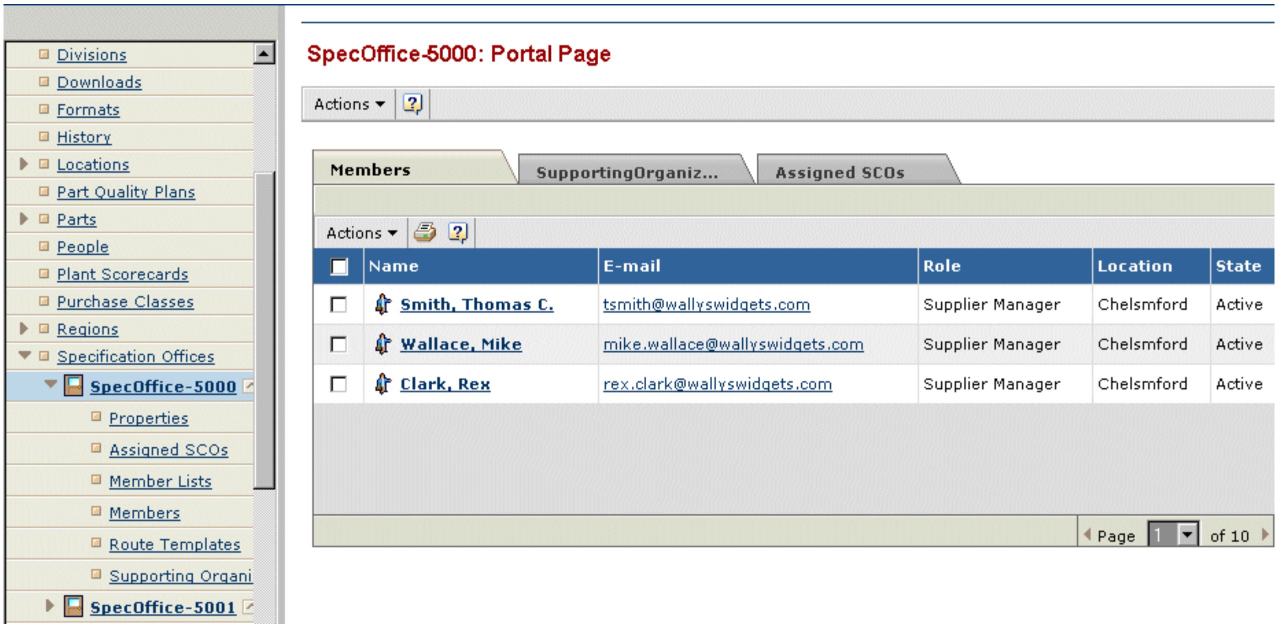
   Business Unit. Click and select the business office for the specification office.

   Description. A description of the specification office.
4. Click **Done**.

Viewing the Portal Page for a Specification Office

To view the portal page for a specification office

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

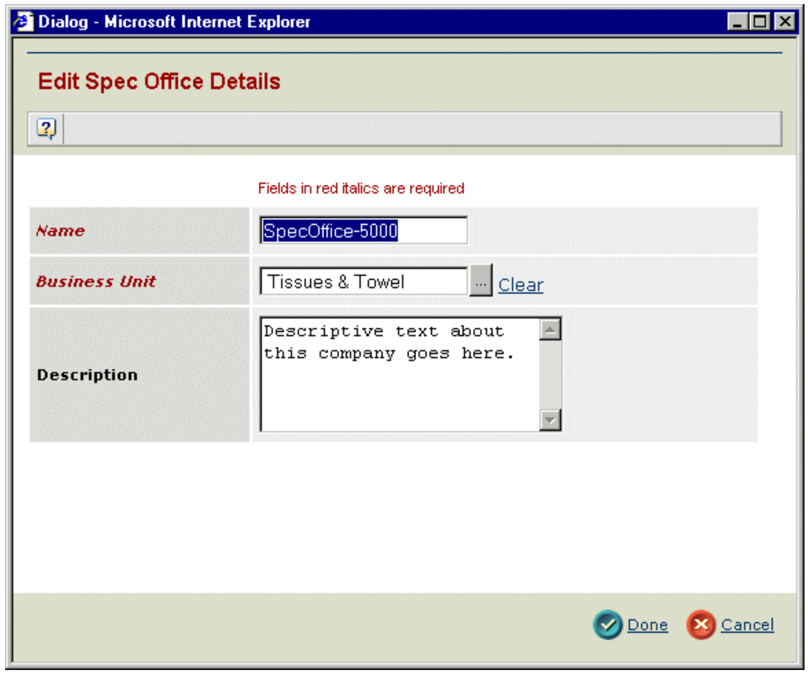


4. Use the category list to view additional information about the specification office:

Category	Description	For details, see:
Properties	To view and edit properties for a specification office.	*Editing Details of a Specification Office*
Assigtned SCOs		
Member Lists		
Members		
Route Templates		
Supporting Organizations		

Editing Details of a Specification Office

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



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

Maintaining Capabilities Information

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

The following topics are covered:

Viewing a List of Capabilities

Creating a Capability

Adding an Existing Capability

Viewing Information for a Capability

Editing Details About a Capability

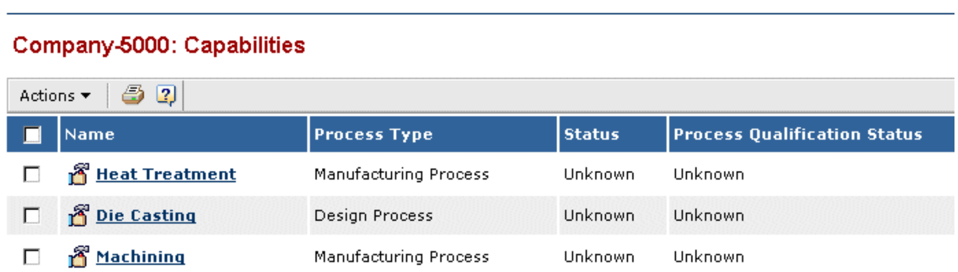
Viewing a List of Capabilities

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

To view a list of capabilities

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

   The Capabilities page opens.



Company-5000: Capabilities

Actions

	Name	Process Type	Status	Process Qualification Status
☐	Heat Treatment	Manufacturing Process	Unknown	Unknown
☐	Die Casting	Design Process	Unknown	Unknown
☐	Machining	Manufacturing Process	Unknown	Unknown

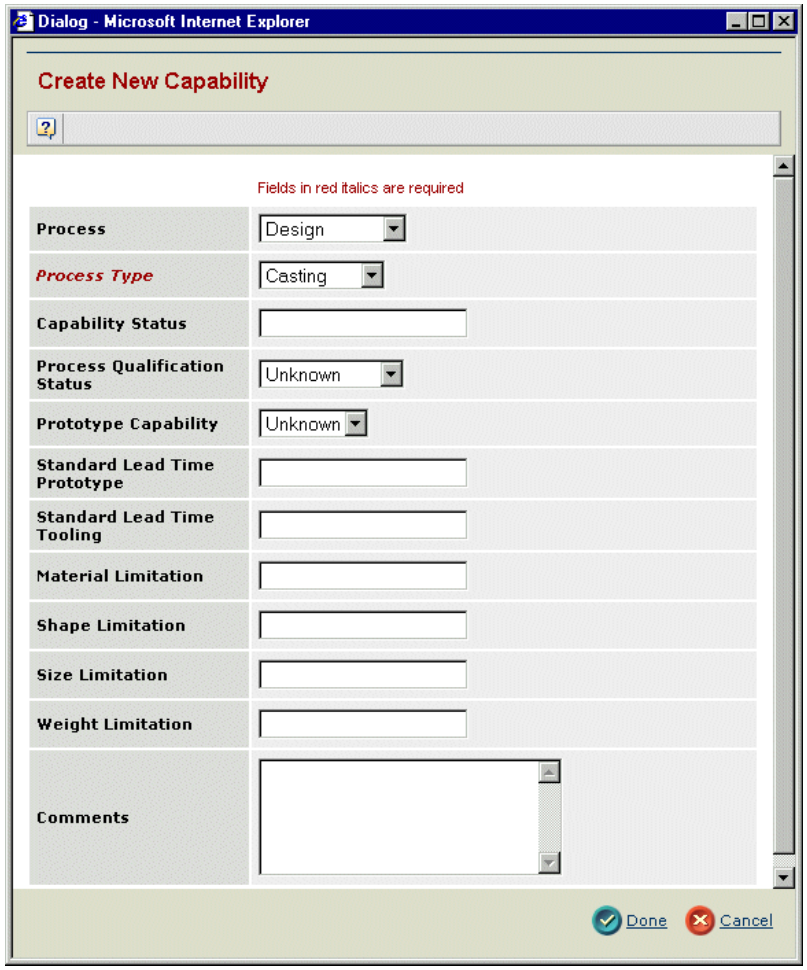
3. To add a capability to the database, click **Create New** from the page Actions menu. See ***Creating a Capability.***
4. To add an existing capability for the selected company or subsidiary, click **Add Existing** from the page Actions menu. See ***Adding an Existing Capability***.
5. To remove capabilities from the selected company or subsidiary, click the check box for each capability you want to remove and click **Remove** from the page Actions menu. To select all capabilities in the list, click the check box in the column heading.

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

Creating a Capability

To add a capability

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



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

   Process. Process for the capability.

   Process Type. Process type. Required.

   Capability Status. Status of the capability. ???? INPUT OR DISPLAY-ONLY ????

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

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

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

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

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

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

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

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

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

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

Comments.

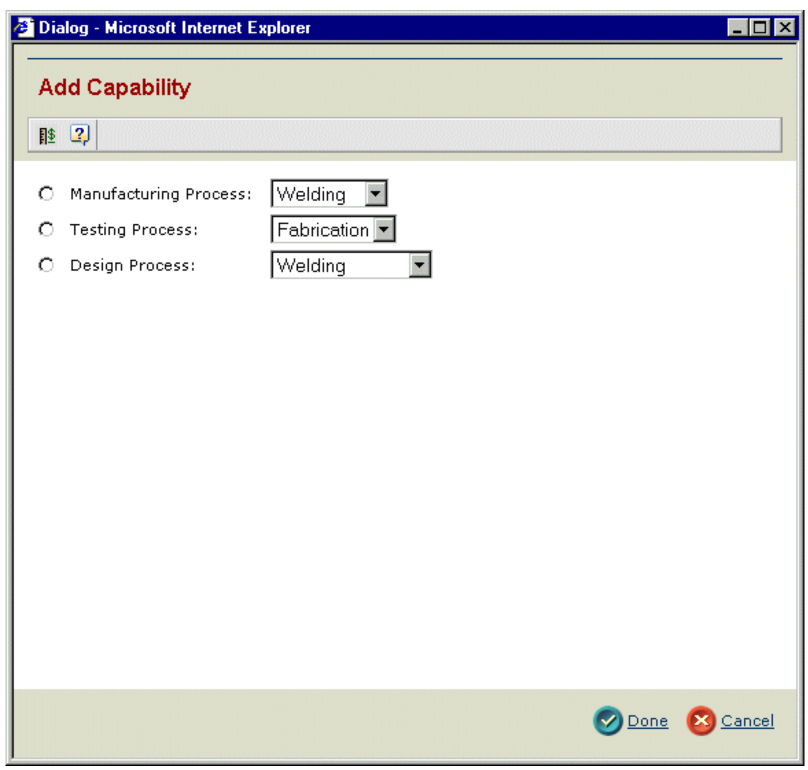
4. Click **Done**.

Adding an Existing Capability

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

To add an existing capability

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



3. Select one of the following processes:

Manufacturing Process

Testing Process

Design Process

4. For the process(es) you selected, select the process type from the drop-down menu.

5. Click **Done**.

Viewing Information for a Capability

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

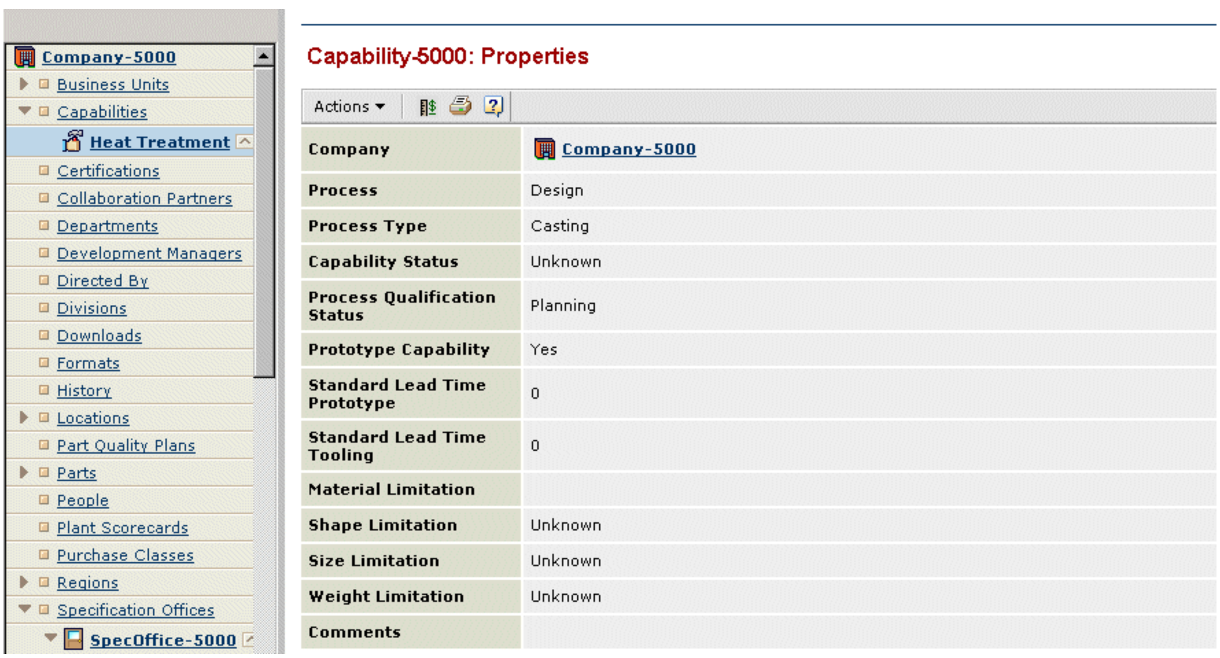
To view information for a capability

1. Open the Properties page for the company or subsidiary you want to view capabilities for.

2. From the category list, click **Capabilities**.

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

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



   The Properties page for a capability contains details about the capability. For details on specific fields, see ***Creating a Capability.***

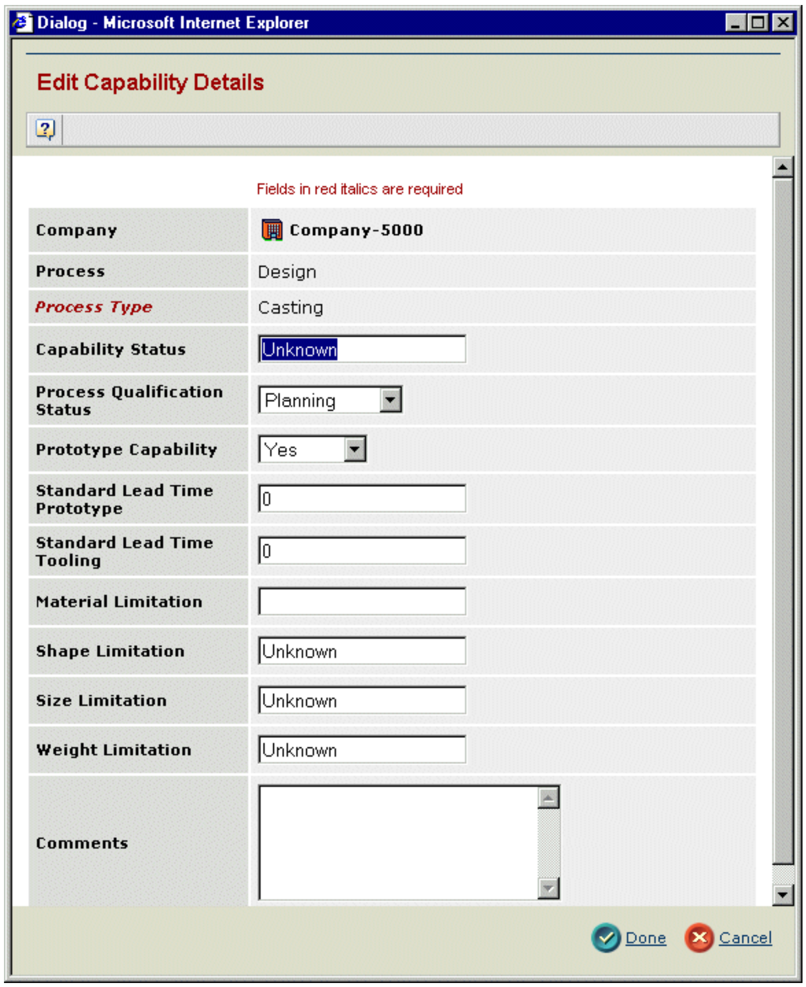
4. To edit the properties listed, click **Edit Details** from the page Actions menu. See ***Editing Details About a Capability***.

Editing Details About a Capability

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

To edit details about a capability

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



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

Maintaining Format Information

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

The following topics are covered:

Viewing a List of Formats

Adding an Existing Format

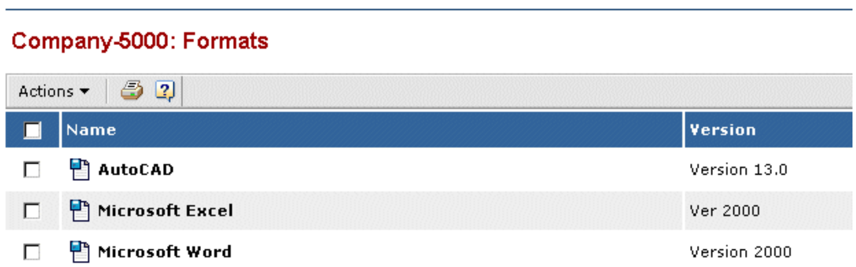
Viewing a List of Formats

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

To view a list of formats

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

   The Formats page opens.



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

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

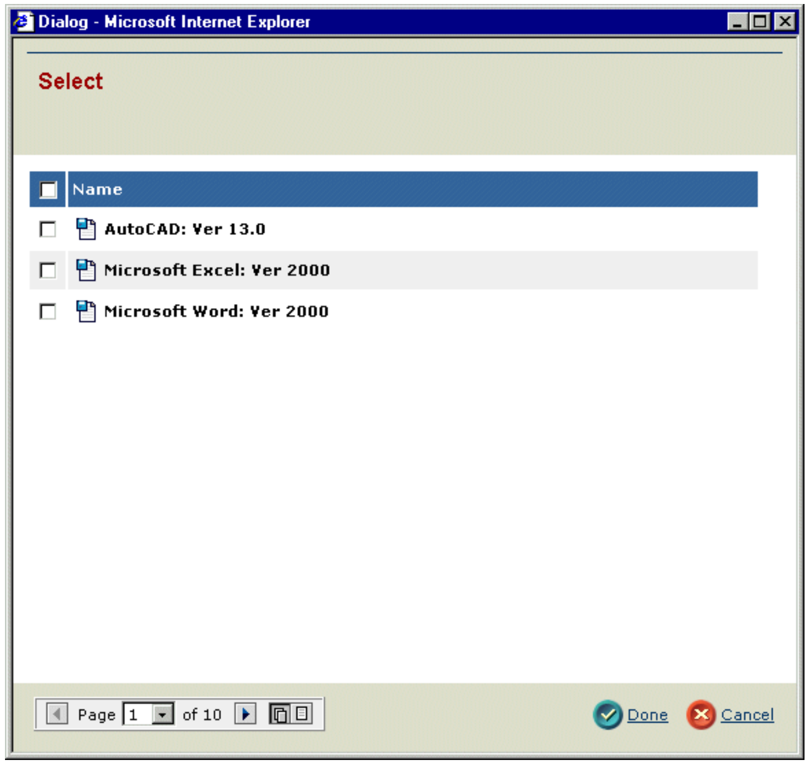
Adding an Existing Format

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

To add an existing format

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

   The Select page opens.



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

Maintaining Potential Supplier Information

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

Potential Suppliers is available only for Supplier Central.

The following topics are covered:

Viewing a List of Potential Suppliers

Creating a Potential Supplier

Viewing Information for a Potential Supplier

Editing Details About a Potential Supplier

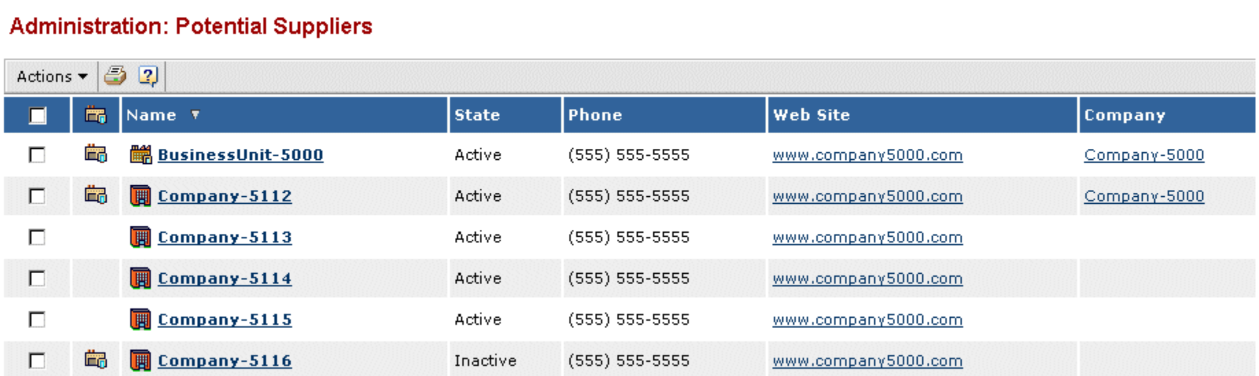
Viewing a List of Potential Suppliers

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

To view a list of potential suppliers

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

   The Administration: Potential Suppliers page opens.



Administration: Potential Suppliers

Actions

		Name	State	Phone	Web Site	Company
		BusinessUnit-5000	Active	(555) 555-5555	www.company5000.com	Company-5000
		Company-5112	Active	(555) 555-5555	www.company5000.com	Company-5000
		Company-5113	Active	(555) 555-5555	www.company5000.com	
		Company-5114	Active	(555) 555-5555	www.company5000.com	
		Company-5115	Active	(555) 555-5555	www.company5000.com	
		Company-5116	Inactive	(555) 555-5555	www.company5000.com	

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

2. To add a potential supplier to the database, click **Create New** from the page Actions menu. See ***Creating a Potential Supplier.***

3. To add an existing company as a potential supplier to the list, click **Add Existing** from the page Actions menu. Use the Search page to find and select the company.

4. There are several ways to discontinue working with a potential supplier:

   - To delete the company definitions for potential suppliers from the database, click the check box for each supplier you want to delete and click **Delete** from the page Actions menu. To select all suppliers in the list, click the check box in the column heading.

- To remove suppliers from the list but keep their company definitions, click the check box for each supplier you want to remove and click **Remove as Potential Supplier** from the page Actions menu.
- To deactivate suppliers, click the check box for each supplier you want to deactivate and click **Deactivate** from the page Actions menu.

Creating a Potential Supplier

To add a potential supplier

1. Click **Tools** > **Administration** > **Potential Suppliers** to view a list of suppliers. (This link is available only for users defined in the role of Organization Manager.)
2. Click **Create New** from the page Actions menu.
3. Enter details about the company that is the supplier, including the following:

   Name. Name of region. Required.

   Company ID. ????? WHY NOT POPULATED ????

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

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

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

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

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

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

   FTP Directory. The directory for the FTP site.

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

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

   Description. A description of the region.
4. Click **Done**.

Viewing Information for a Potential Supplier

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

To view information for a potential supplier

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

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

The Properties page contains details about the business unit or company that is a potential supplier. For details on specific fields, see ***Creating a Company, Subsidiary, Business Unit, or Department.***

2. To edit the properties listed, click **Edit Details** from the page Actions menu. See ***Editing Details About a Region***.

3. Use the category list to view additional information about the company or business unit. For more information, see ***Viewing Information for a Company***.

Editing Details About a Potential Supplier

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

To edit details about a potential supplier

1. Open the Properties page for the company or business unit that is the potential supplier.

2. Click **Edit Details** from the page Actions menu. For more information, see ***Editing Details About a Company***.

Lifecycles

NEED TO FIND OUT HOW PEOMOTE/DEMOTE/SIGNATURE WORKS IN V10.5 LIFECYCLES.