TEAMCENTER

Active Workspace Fundamentals

Active Workspace 6.3

SIEMENS

About Siemens Digital Industries Software

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1. Why use Active Workspace?

Active Workspace helps you create and manage data in your organization's product lifecycle management (PLM) system by providing easy navigation of products and processes, collaboration across your business, and access to other tools such as computer-aided design (CAD) software and Microsoft Office.

Active Workspace ensures that you see only the tasks and data relevant to your needs and interactions. For example:

- Active Workspace only shows those commands that you can execute. Some commands may be grayed out or not shown.
- If your administrator does not install optional features, Active Workspace does not show the associated commands. For example, the **Send to NX** command is shown only if the NX for Active Workspace extension is installed.

In addition, your administrator may configure the interface for a specific industry, group, role, or individual user.

> Note:
>
> Not all areas of the life cycle are currently supported in Active Workspace.

Where do I go from here?

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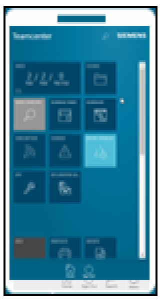
Business User	
User interface basics	
Access your content quickly	Generate and view predefined reports
Create/Add a part, document, or other project	Edit properties
Create a new revision	

2. Exploring the Active Workspace interface

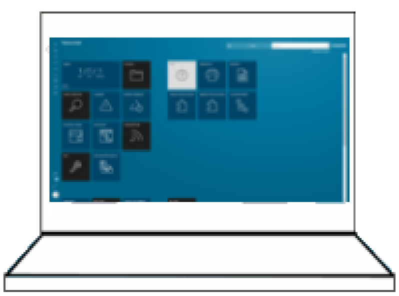
Using Active Workspace on different devices

Active Workspace runs in a browser on traditional computers using mouse and keyboard inputs and on touch displays found on contemporary Windows devices, iPads, Android OS tablets, and smart phones.

- On touch-enabled devices, you can use standard touch gestures to navigate and select commands and objects.



- On a desktop computer or laptop, you can use the left mouse button to select commands and objects and the keyboard for shortcuts or tabbing through the interface.



- In the **Viewer** view, you can use the left mouse button while pressing the Control (pan) or Shift (zoom) keys to modify the default geometry navigation controls.

- In some situations you can use the right mouse button to enable additional commands, as described in context in the user documentation such as the instructions for arranging columns in a table display, resizing tiles, and working with data in the **Relations** and **Architecture** tabs.

> Note:
>
> Active Workspace supports the standard keyboard shortcuts for cut, copy and paste (**Ctrl**+X, **Ctrl**+C, **Ctrl**+V) when those commands are available on the page.

Working in narrow mode and on a mobile device

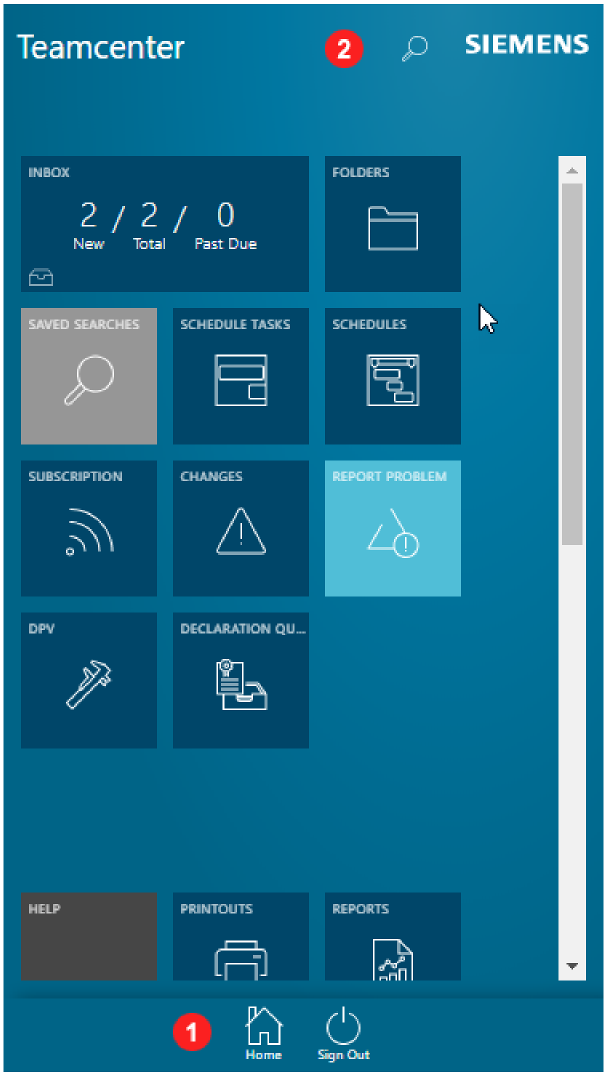
Active Workspace adapts to the available space, whether running on a computer monitor, tablet, phone, or within another application.

As the available space is reduced, Active Workspace adjusts its layout or functionality. For example, tables are available for a wide layout, but are replaced by lists of tiles in a narrow layout, and commands move from the sides of a wide layout to the bottom of a narrow layout.

> Note:
>
> When you are working with files on iOS, Android, or Windows Phone systems, the device controls the **Browse** button and provides a dialog that lets you choose how you want to locate files. These systems may also let you select a camera to directly import images.

Using the narrow interface

The narrow interface uses a one-panel system for displaying Active Workspace features.



1 Primary toolbar

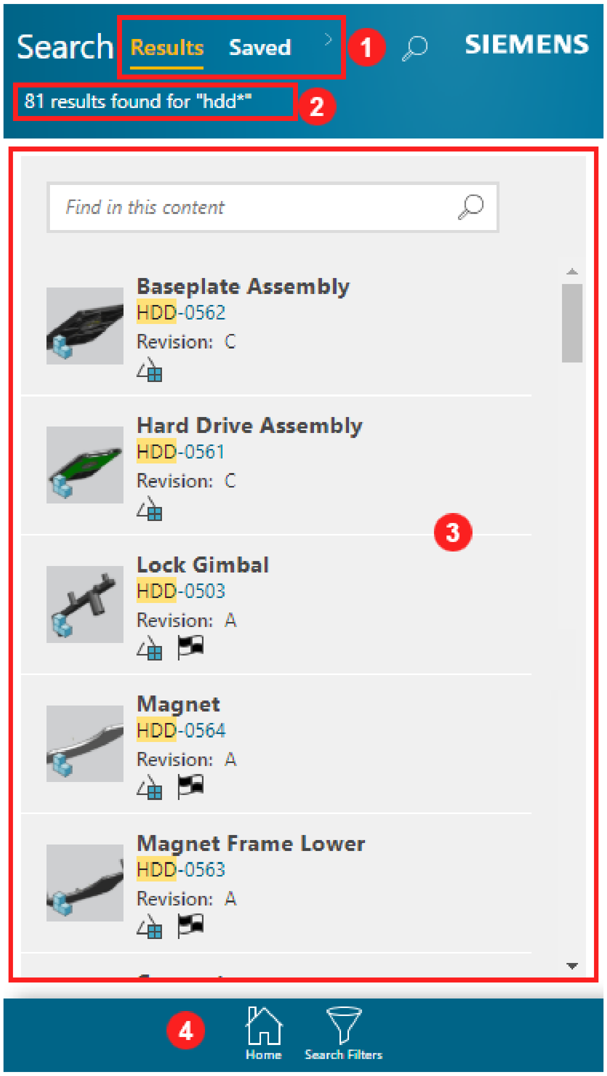
Displays the available commands, such as **Home** and **Sign Out**. Other commands are available from other locations in Active Workspace.

> Note:
>
> **Sign Out** is available only on the home page.

2 Global search

Searching

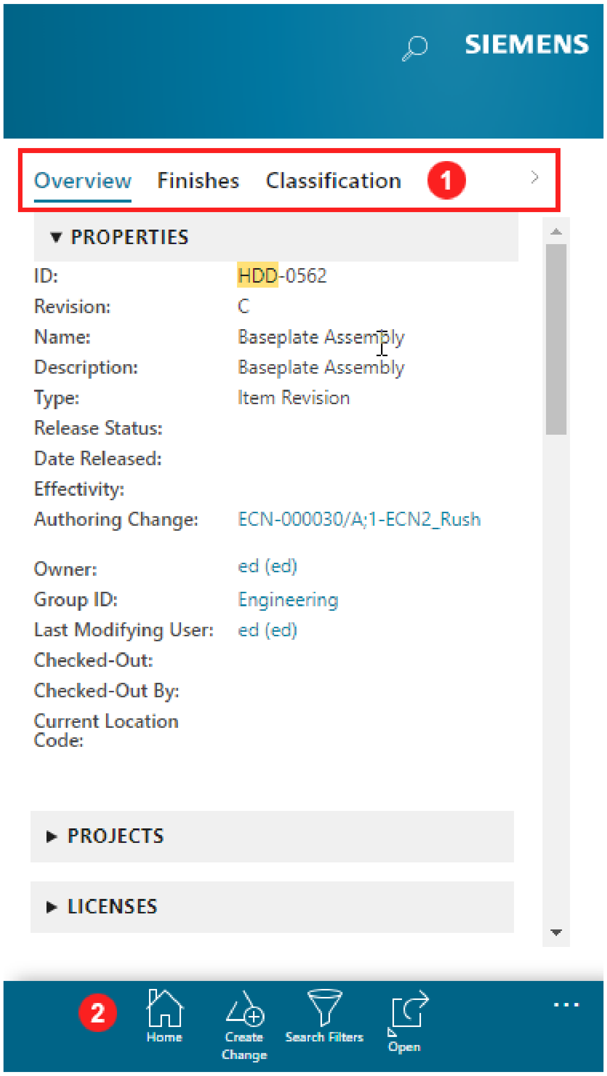
When you use search in the narrow interface, Active Workspace displays the list of search results.



1	Pages available with **Search**
2	Displays the number of search results and the filtering breadcrumbs.
3	Displays the list of search results. Tap a result object to replace the search results list with information about the object.
4	Primary toolbar with available commands.

Viewing details

Tap an object in any primary work location, such as search results or a folder, to display the secondary work area with details about the selected object.



1 Displays tabs containing details about the selected object. The information that displays is based on the selected object, your group and role, and the site configurations.

If there are too many tabs to display in the available space, a right-chevron 〉 is displayed.

- Tap the right-chevron button 〉 to select summary information tabs from a menu such as **Overview** and **Where Used**.

The content area does not update unless you select a new tab from the menu.

The information displayed is based on the selected object, your group and role, and site configurations.

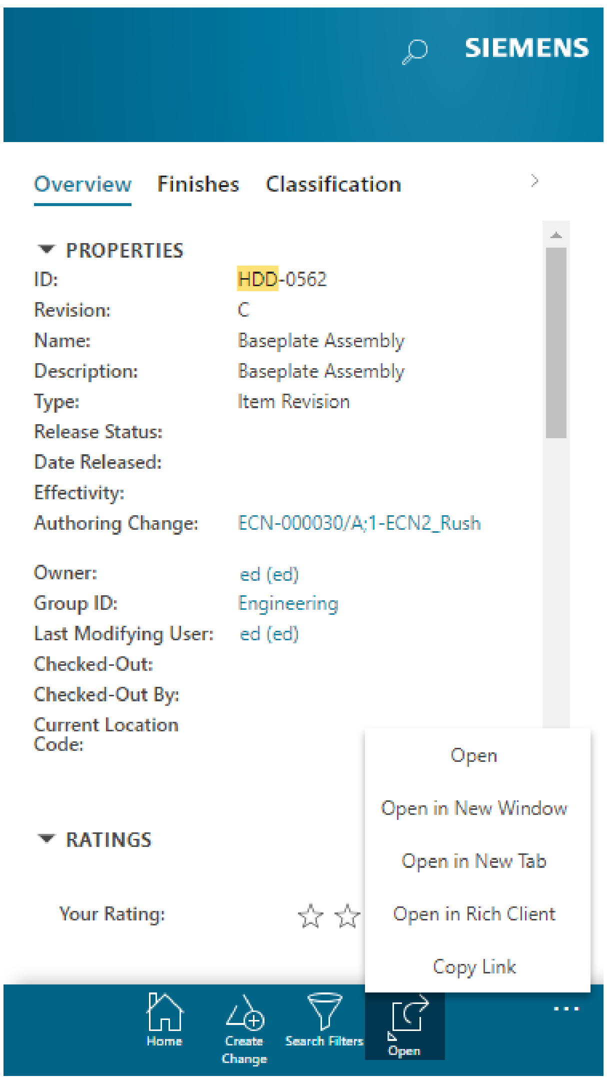
- Tap a partially displayed tab, indicated by ellipses, to fully display the tab and update the content area.

2 Primary toolbar with available commands.

When the number of available commands exceeds the available space, you can tap **More** to display more.

Opening objects

In any location in the narrow interface, tap **Open** to display the menu.

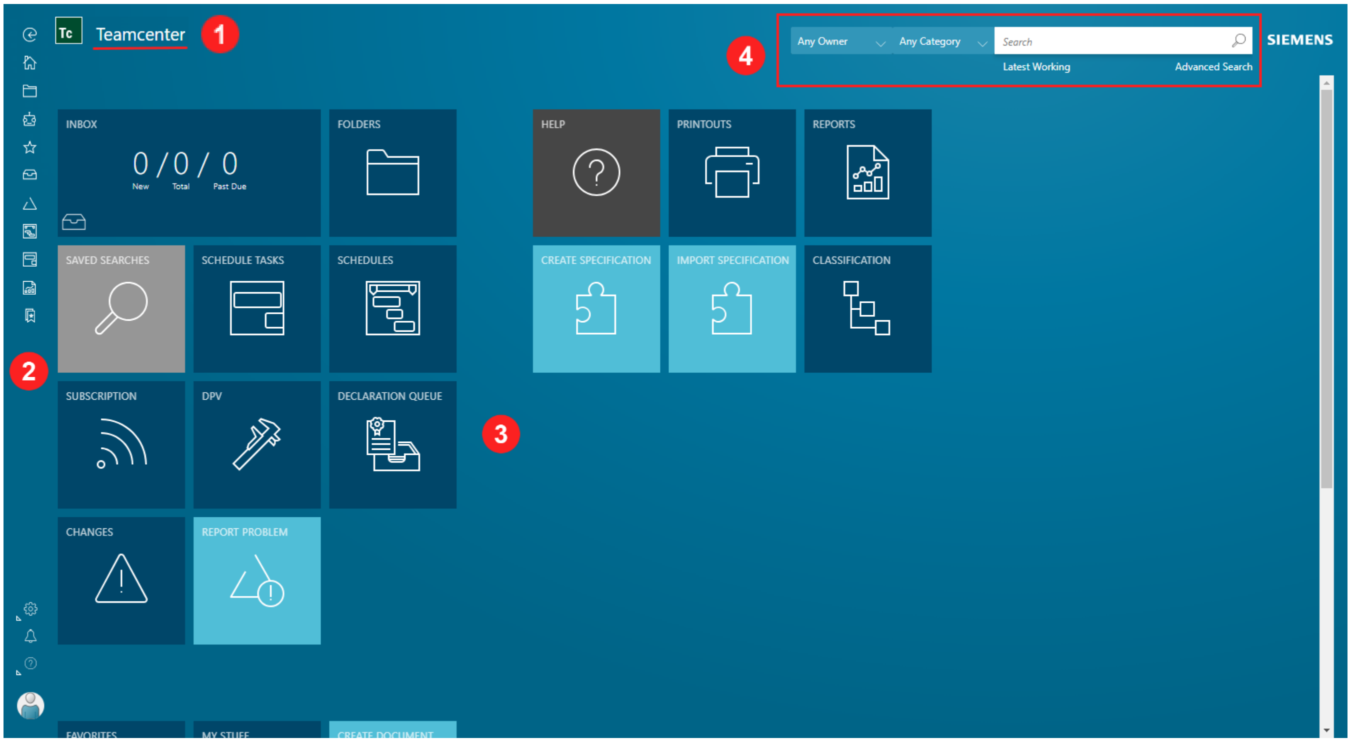


Choose **Open** to open the object in Active Workspace, or choose another option available on your device.

Page layouts and navigation

Home page

Your Active Workspace home page contains tiles and toolbars that allow you to launch various commands, such as viewing your folders and schedules, opening your Inbox, accessing help documents, and running reports. Your administrator configures the home page based on your role. This allows the home page to be customized for each user, which makes navigation easier by placing only your most frequently used commands on your home page.



> Note:
>
> Your home page may look different than the example image shown above. In addition, when Active Workspace is embedded in another application, some functionality may not be available. For example, when Active Workspace is embedded in the Teamcenter rich client, the **Sign Out** button is removed.

The following table describes the Active Workspace tiles and toolbars that are common to most installations.

1 Header

On the home page, the header includes only the location, **Teamcenter**.

2 Global navigation

These commands are available regardless of where you are in Active Workspace.

Icons at the top

Previous Location: Takes you to the previous named page visited in Active Workspace. The name of the page it takes you to is displayed below the icon.

Home: Takes you back to the home page.

Discussions: Displays your active discussions.

Folders: Displays your current work.

Active Folders: Displays your active searches.

Inbox: Displays tasks assigned to you.

Assistant: Displays a list of commands and the relevant data that suggest the next actions to perform.

Favorites: Contains the list of data you marked as your favorites.

Changes: Contains the list of available change objects.

Schedules: Displays a list of your schedules based on the selected role of Coordinator, Participant, or Observer.

Schedule Tasks: Contains the list of available schedule tasks that are assigned to you.

Reports: Access the list of available reports.

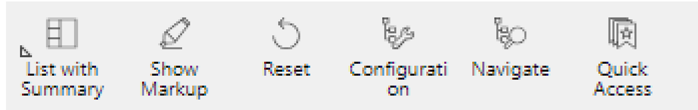
Quick Access: Quickly view objects you recently worked with, copied to the clipboard, or added to favorites.

Icons at the bottom

Active Change: Provides access to display and modify the current change context setting.

Settings:

- **Compact** / **Comfortable**: Set the data density to either compact or comfortable.
- **Labels**: Display or hide command icon labels for each of the toolbars.



- **Logging**: Access the performance logging. Talk to your administrator before using these tools.

Alerts: Notifies you when specific items have changed. Also prompts you when a background process completes.

Help:

- Displays online help.
- Displays Active Workspace version information.

Profile:

- Displays your current project, group, and role.
- Displays the current revision rule setting.
- Provides access to display and modify your profile settings.
- Allows you to sign out of Active Workspace.

The icon shown here is a default image. If the current user has added a profile picture it appears in the circle at the bottom of navigation. Otherwise the first letter of the username appears there.

> Note:
>
> If there is insufficient space to show all of the bottom-position icons due to your screen resolution or the vertical size of the client window, an ellipsis (...) appears in the last icon position. Clicking it reveals the hidden icons.

3 Work area

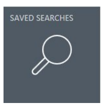
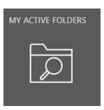
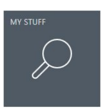
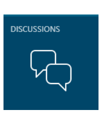
The tiles on the work area allow you to perform many tasks, such as access your Inbox, your **Home** folder, and your saved searches. If there are more tiles than fit the screen, you can scroll vertically to view more tiles.

4 Global search

Includes access to prefilters and **Advanced Search**.

Home page tiles

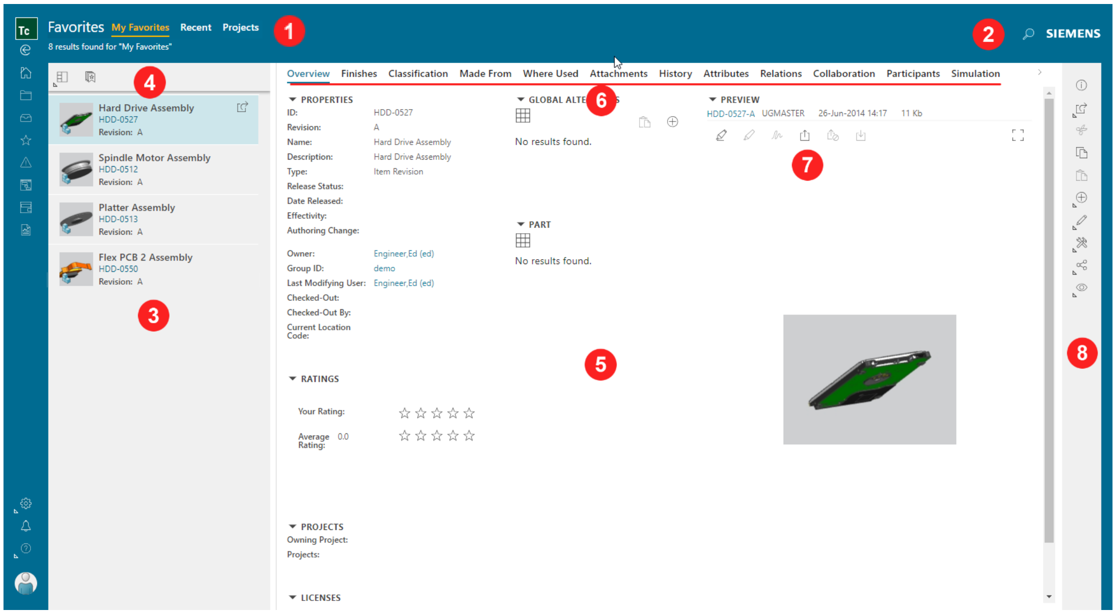
The following Active Workspace home page tiles are common to most installations. The tiles on your home page may differ based on your specific configuration.

	**INBOX**	Displays the number of tasks that you must complete. Click the **INBOX** tile to view the task details and tabs containing additional information.
	**FOLDERS**	Enables you to organize your work and data. It contains your Teamcenter mailbox and your Newstuff folder, along with any other folders, data, parts, and documents you may have added. You can create data, such as parts, schedules, or programs in your **Home** folder.
	**SAVED SEARCHES**	Provides access to searches you saved or pinned. Saved searches can be from global, quick or advanced searches.
	**MY ACTIVE FOLDERS**	Provides access to active folders that define searches which update automatically.
	**HELP**	Provides access to online help files, if configured for your site.
	**MY STUFF**	Contains the data you created in Active Workspace.
	**FAVORITES**	Contains the list of data you marked as your favorites.
	**REPORTS**	Allows you to generate various types of predefined summary and item reports.
	**DISCUSSIONS**	Allows you to create a dialog with others on objects you select, such as items, parts, and documents.
	**PRINTOUTS**	Contains any asynchronous reports that you need to print; these reports are printed one at a time. Reports are printed asynchronously if multiple

		reports are selected for printing at the same time or if your administrator has configured the report template to run asynchronously.
	**SUBSCRIPTION**	Provides notifications when users provide feedback about your data.
	**PROJECTS**	Allows you to view your projects and your team members.
	**MY GALLERY**	Displays all product snapshots (3D data associated with a product) created and shared by you or those shared with you.
	**ASSIGNMENT MATRIX DEFINITIONS**	Allows you to create an assignment matrix definition for an assignment matrix, which you can use to automate the assignments of workflow participants.

Page layouts

Tiles on the home page display various other locations, such as the **Favorites**, the **Inbox**, and **Folders**. All the locations share a common layout.



1 Header

Depending on the location within the client, the header may contain:

- Locations such as **Favorites**, **Inbox**, and **Folders**.
- Pages within the location.
- Breadcrumb to help navigate.
- Information about the selected object.

2 Collapsed global search

Click **Search** to expand the global search so you can use it.

3 Results panel

The results panel typically displays a list, table, or tree of parts, documents, or other objects relevant to the current page.

It also contains the results panel toolbar (**4**) with commands specific to the results panel.

5 Work area

The work area displays details about the selected object. The details that display depend on the type of object selected. This includes a set of navigational tabs (**6**).

> Note:
>
> If there are too many tabs to display in the available space, a right-chevron > is displayed.
>
> - Click the chevron to select a tab from a menu. The content area does not update unless you select a new tab from the menu.
> - Click a partially displayed tab, indicated by ellipses, to fully display the tab and update the content area.

It also includes the work area toolbar (**7**). You see different commands and a different number of commands based on the data that is displayed.

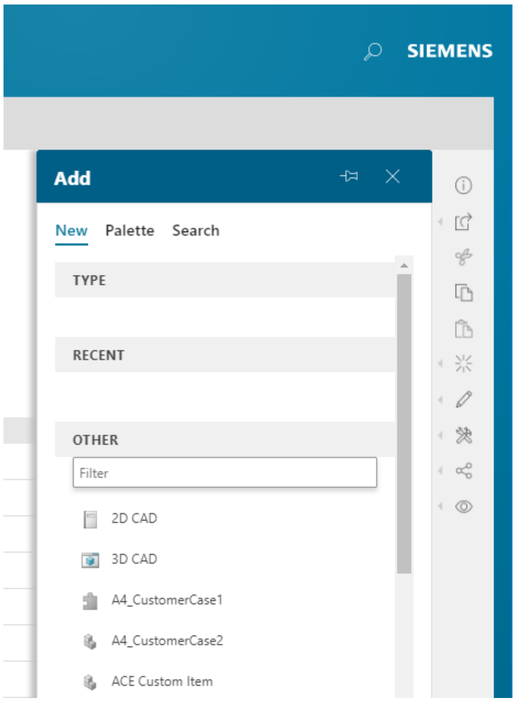
8 Primary toolbar

Each page has a collection of commands organized in the toolbar along the right side.

- Some are individual commands accessed by clicking or tapping the icons.
- Other commands are grouped together in a stack of icons. Click any of these grouped icons to access the individual commands.

Task panels

Some commands open a task panel on the right side of the client page. Typically, these panels appear over the top of the information in the work area. Examples include **Add** panel, **Create Change** panel, and **Trace Link** panel.

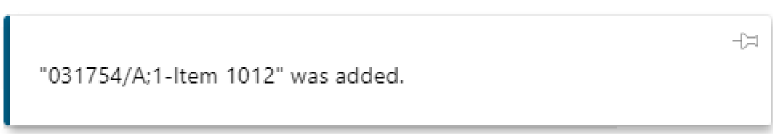


Other commands, such as search **Filters**, display a panel on the left.

Notification and error messages

Active Workspace adds notification messages to the bottom of the page. You may want to pin a message so that it continues to appear in the window, and you can refer to the message text later during your work session.

Example:

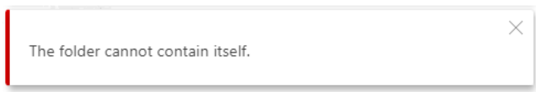


- To pin a notification message, click **Pin** (or anywhere in the message box).
- To unpin a notification message, click **Unpin** (or anywhere in the message box).

Navigating to a new location or selecting a new object, such as a physical part or a file, does not dismiss the message. You must unpin the message to dismiss it.

Active Workspace also adds error messages to the bottom of the page.

Example:



Error messages must be dismissed by clicking the X.

Move and resize panels

As you work with objects in Active Workspace, you may open panels, such as the **Information** panel, to perform your task. Supported panels can be undocked and moved around the browser window to your desired location. They can also be resized to take up less space.

When you dock a panel to return it to its default location, the next time you undock the panel, it returns to its last undocked size and location.

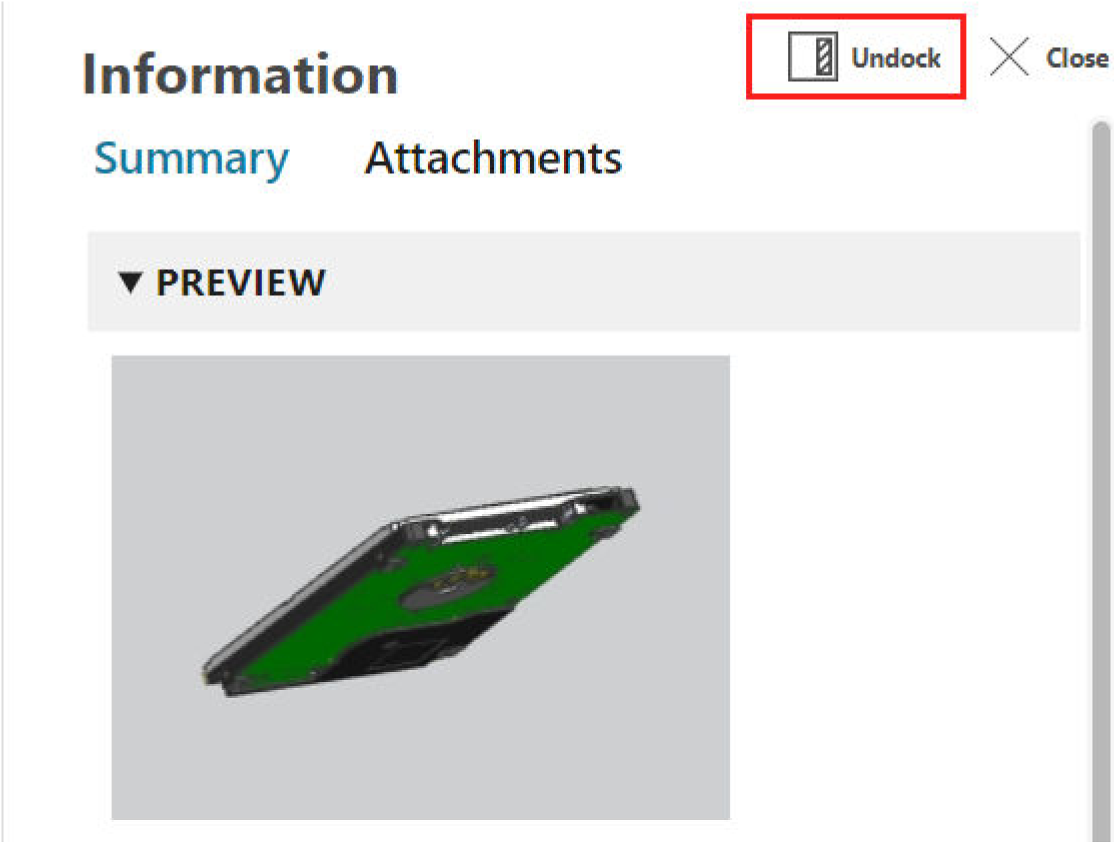
Note:

The following steps show how to undock the **Information** panel. Other panels that can be undocked work in the same way.

1. When viewing an object in Active Workspace, click **Information** from the primary toolbar.

   The **Information** panel opens.

2. To undock the panel, click **Undock** in the upper-right corner of the panel.



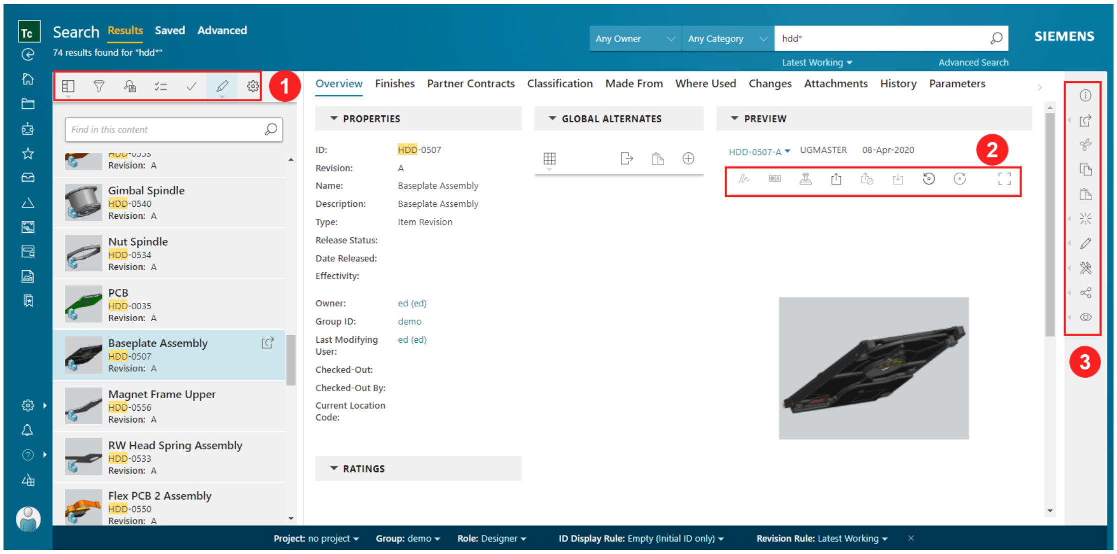
The panel undocks and can now be moved around the browser window.

3. Do any of the following:

   - To move the panel, place your cursor in the panel header and then click and drag the panel to your desired location in the browser window.
   - To resize the panel horizontally, place your cursor on the right or left edge of the panel and then click and drag to resize it.
   - To resize the panel vertically, place your cursor on the bottom of the panel and then drag to resize it.
   - To resize the entire panel, click the bottom-right corner of the panel and then drag to resize it.
   - To return the panel to its default size and location, click **Dock** .

Toolbars and commands

Active Workspace pages may include three different toolbars.



1	Results panel toolbar
2	Work area toolbar
3	Primary toolbar

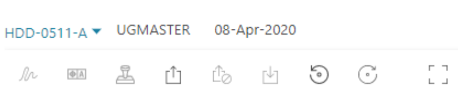
Results panel toolbar

The results panel toolbar includes commands associated with the data displayed in the results area. As the data changes, the commands available in the toolbar change. Some commands are grouped together as a stack of commands under an icon with a small triangle under the command icon.

> Note:
>
> Depending on the size of your browser window and display resolution, the **More** ▫▫▫ command may display on some of the results panel toolbars. Clicking this icon displays additional commands that are not displayed on the toolbar due to size constraints.

Work area toolbar

The work area toolbar includes commands associated with the data displayed in the work area. As the data changes, the commands available in the toolbar change.



Primary toolbar

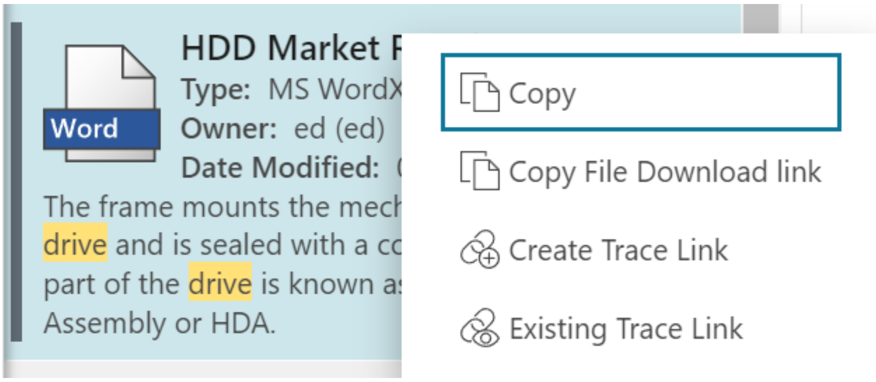
The primary toolbar includes commands associated with the data displayed on the page. As the data changes, the commands available in the toolbar change.

> Tip:
>
> If you don't see the command you need, try looking for it in the grouped icons.

Command context menus

You can access Active Workspace commands in the context of the items you are working with by right-clicking on the items in a table or a list to access the commands. Depending on the area of Active Workspace you are in, the available commands are different. For example, right-clicking on a schedule task gives you a completely different set of in context commands versus clicking on a part in a structure.

The following graphic shows the commands in the context of a document in the search results list.



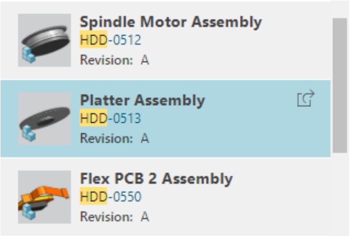
> Note:
>
> Context menus are not available on touch devices.

Selecting single or multiple objects

In Active Workspace you can select objects one at a time or several at once.

Select a single object

To select a single object, click on it. The object highlights to indicate that it is selected.



Select multiple objects

There are two methods to select multiple objects. In both cases, objects are highlighted to indicate selection.

1. You can use **Selection Mode** located in the results panel toolbar.

   Once you click or touch **Selection Mode**, you can:

   - Click or touch any object to select it.
   - Shift-click to select a range of objects.
   - **Select All / Clear Selections**. This is a toggle. Clicking it once selects all displayed objects. Clicking it again, clears the selection on all the displayed objects and exits the multiselect mode.

2. The second method is to click, Shift-click, or Ctrl-click objects without using **Selection Mode**.

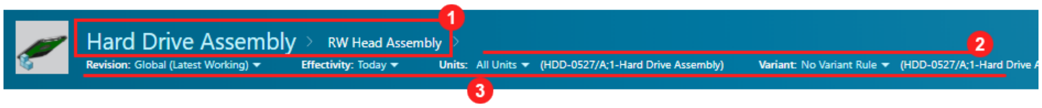
   - Click or touch any object to select it. Any previously selected objects are deselected.
   - Ctrl-click nonconsecutive objects to select them.
   - Shift-click to select a range of objects.
   - **Select All / Clear Selections** is not available without using **Selection Mode**.

Header information

Depending on the location within Active Workspace such as **Favorites**, **Inbox**, or **Folders**, the header can include a variety of information.

Header for the **Home** folder.

Header for an assembly.



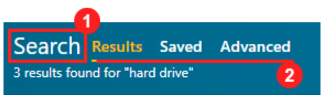
1 Location.

2 Breadcrumb to display and navigate structure or hierarchy.

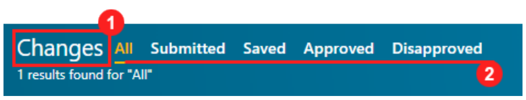
3 Additional information about the selected object.

For other locations such as **Search**, **Changes**, **Schedules**, the header includes multiple pages for each location.

Header for the **Home** folder.



Header for an assembly.



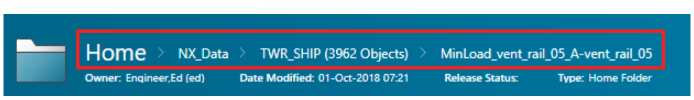
1 Location.

2 Multiple pages for a location. Click each page to see additional information.

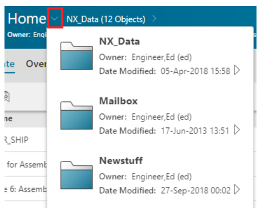
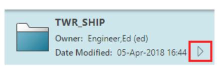
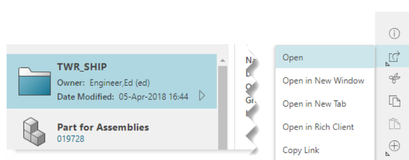
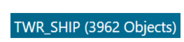
> Tip:
>
> If you horizontally shrink the client window so that there is not enough space to show all the breadcrumbs, the items furthest to the right become hidden and the **More** link appears. Click that link to reveal the hidden breadcrumbs.

Navigating your workspace using breadcrumbs

Locations can have a breadcrumb showing where you are within a folder structure or part structure.



Use these breadcrumbs to easily navigate the structure.

To	Do this	Result
Move to a different folder location.	Click the folder name. 	You move to the selected folder location. 
Move to a different branch within a parent folder.	Click the chevron to select a folder from within the parent folder and pick from the drop-down list. The drop-down lists all the folders within the parent location. 	You move to the selected folder location.
Navigate *to* a folder without opening it or resetting the breadcrumb.	Click **Navigate** on the selected folder. 	The folder name is added to the breadcrumb, but the starting folder in the breadcrumb does not change. 
Open a folder.	With the folder selected, click **Open** > **Open** on the primary toolbar. 	The breadcrumb resets to the opened folder. 

Tip:

If you horizontally shrink the client window so that there is not enough space to show all the breadcrumbs, the items furthest to the right become hidden and the **More** link appears. Click that link to reveal the hidden breadcrumbs.

Views

Display data in the table view

Data can be displayed in a table for things like **Search** results, **Inbox**, **Folders**, and **My Changes**. An administrator specifies the columns available for display. You can select between two types of table views: **Table** and **Table with Summary**.

There are two ways to edit while you are in table view.

- You can place the table into edit mode by clicking **Edit**. While in this mode, you can still tab through cells and expand/collapse objects with child elements. When you are finished making your changes, click **Save Edits**.

- You can directly edit table cells by double-clicking them. If Autosave Tables is enabled in your user properties, when you click off the cell, the changes are saved. If **Autosave Tables** is not enabled, you must click **Save Edits** to save your changes to the table.

> Note:
>
> Table view is not available in narrow interface mode.

Table view

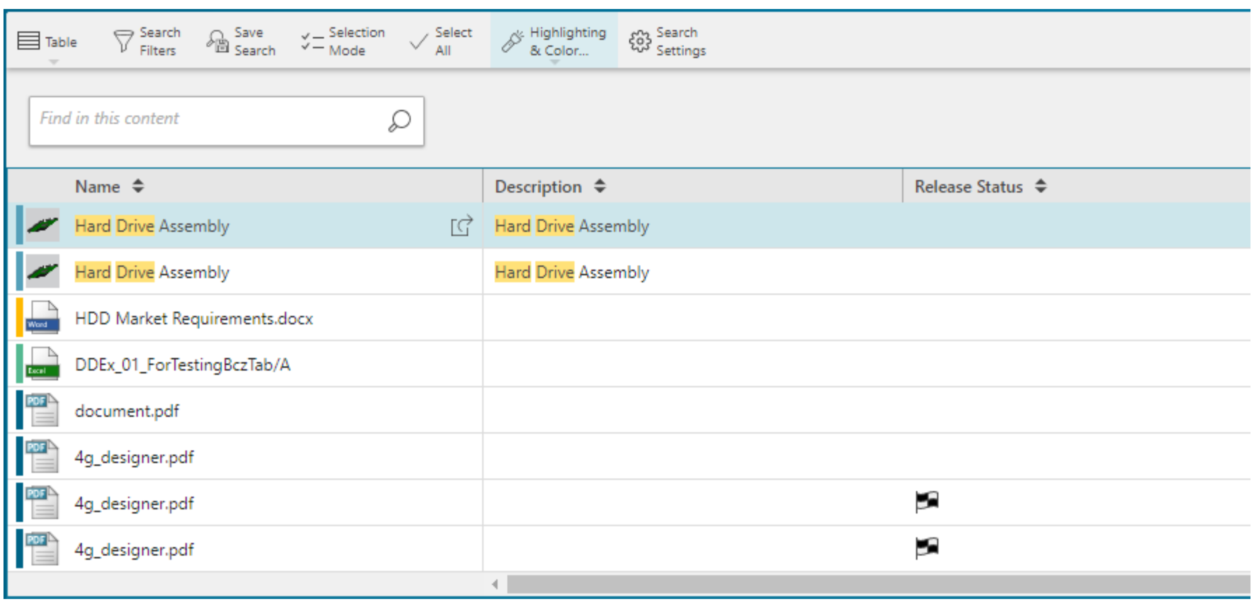
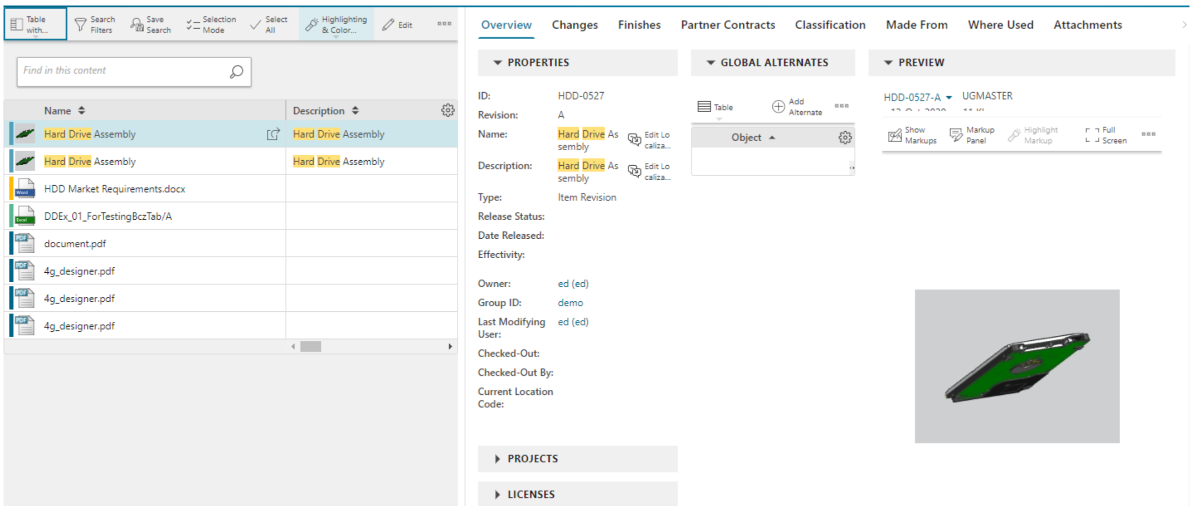


Table with Summary



Note:

- You can click a column header and then select **Hide Column** to hide an entire table column. To show the column again, click ⚙ to the right of the column headings to open the Arrange panel. From here, you can add the hidden column back to the table.

- You can sort the data in the table by clicking the column header and choosing to sort by ascending, descending, or no sorting.

- If a table column contains values of dissimilar data types, the table sorts based on the string values for the data.

- Some tables do not save customizations made to the table, such as hiding, freezing, or resizing columns. They also may not support modification of column arrangements and drag and drop functionality. Any changes made to these types of tables are lost when the table is reloaded.

- If you freeze a table column, this change is lost when the table is reloaded.

- Changes to some table settings are saved automatically and are restored on next access. For more information, see Automatically save table settings.

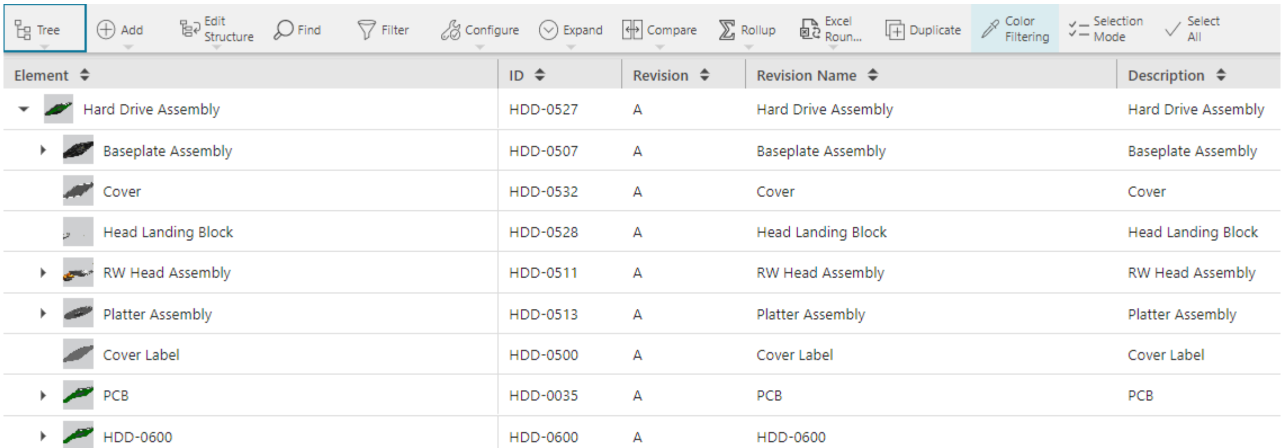
Display structures and folders in the tree view

The **Tree** view displays all elements of a structure or folder in a parent child relationship. When applicable objects contain child objects, an arrow appears next to it. You can navigate through the structure and expand or collapse the tree as needed.

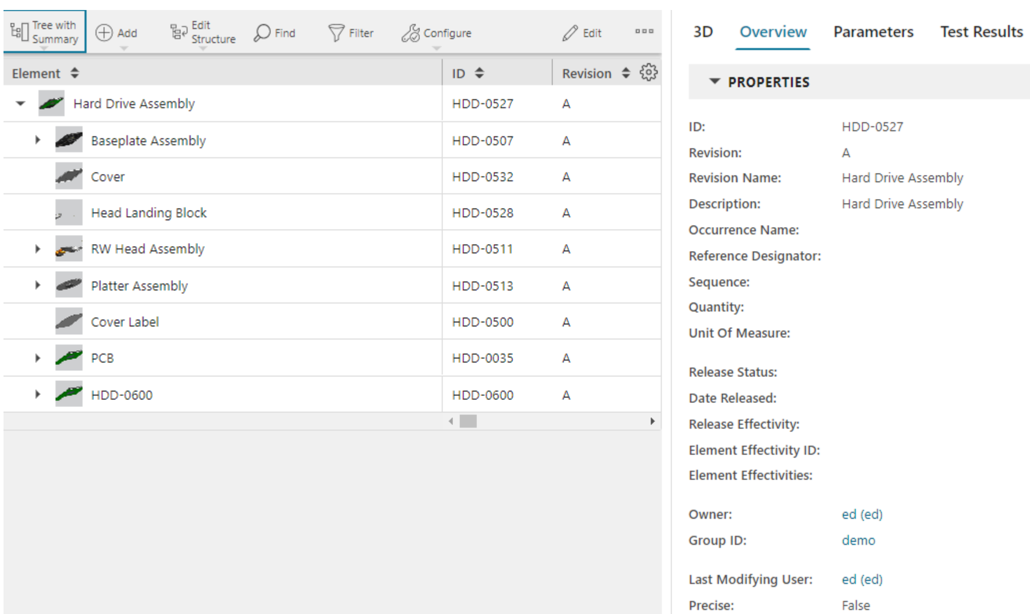
The tree view can be applied to your folders and structure elements displayed in the work area.

You can select between two types of tree views: **Tree** or **Tree with Summary**.

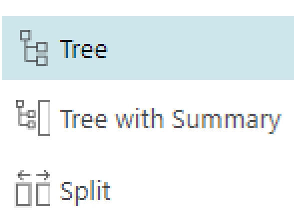
Tree view:



Tree with Summary view:



To display the structure in **Tree** or **Tree with Summary** view, click the icon and select the required view from the list:



Tip:

Tree views also provide efficient loading as the first column is loaded quickly and other columns are loaded subsequently.

Arrange, wrap text, and save the order of columns

You can use the **Arrange** panel to reorder, hide, or display columns in either the **Table** or **Tree** view.

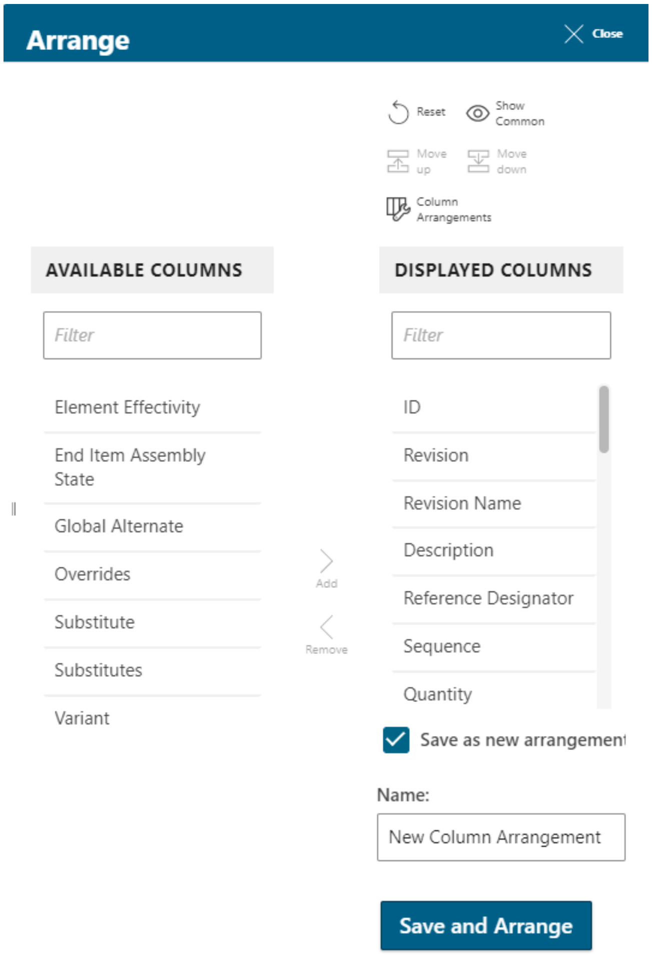
The Arrange panel contains the **AVAILABLE COLUMNS** that can be added to the table or tree and the **DISPLAYED COLUMNS**, which are the columns currently displayed.

Tip:

You can select the **Save as new arrangement** option to save your customized column configuration so it can be applied to views quickly.

Use the Arrange panel

Click the **Table Settings** ⚙ icon to the right of the column headings and select **Arrange** to display the **Arrange** panel.



Reset

Returns the columns to the default order and clears the state of the **Keep Filters** option.

Show All / Show Common

Displays all available properties as columns or only the common properties for the objects in the table.

Move up

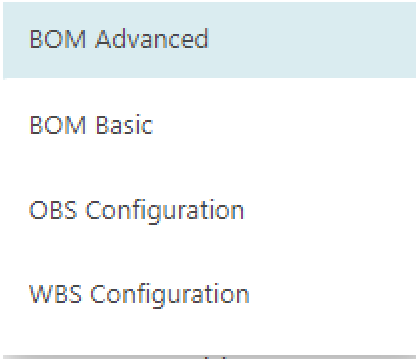
First click on a column name. Then click to alter the column order.

Move down

First click on a column name. Then click to alter the column order.

Column arrangements

Select one of your saved column arrangements to apply it to the view.



Add

Select a table column from the available columns list on the left. Then click > to add it to the list of displayed columns.

Remove

Select a table column from the displayed columns list on the right. Then click < to remove it from the list of displayed columns.

> Note:
>
> If the properties list is long, you can type a property name in the **Filter** field to display a specific property.

You can also select multiple columns to move groups of columns up or down the list by doing the following:

- Shift-click to select a range of columns if they are in consecutive order.
- Ctrl+click nonconsecutive columns to select them.

> Note:
>
> If search results are obtained from a set of external data, such as from a non-Teamcenter database, you may not be able to sort items in a column because the data model for these items does not conform to the Teamcenter properties displayed in the column headings.

You can also drag-and-drop column headings to rearrange the column order of a table.

> Note:
>
> Some tables do not save customizations made to the table, such as hiding or freezing a column, or support making changes to the column arrangements. Any changes made to these tables are lost when the table is reloaded. These tables also do not have the **Arrange** option in the table settings.

Save your column arrangement

When you finish arranging your columns, select the **Save as new arrangement** check box, enter a **Name** for the column configuration, and then click **Save and Arrange**. This saves your column arrangement so you can apply it in the future. You can click **Column Arrangements** on the **Arrange** panel to see a list of all your saved column arrangements.

> Note:
>
> Any column arrangements created by your administrator are also displayed along with your saved column arrangements. Administrator-created arrangements cannot be changed. However, they can be saved as one of your own column arrangements and then adjusted as necessary.

> Note:
>
> Any column arrangements created by your administrator are also displayed along with your saved column arrangements.

Wrap table text

You can toggle text wrapping to have text in table cells automatically start at a new line once it reaches a certain length. This helps tables with large amounts of text look cleaner and makes reading the data easier.

Click ⚙ to the right of the column headings and then select **Wrap Text** to enable text wrapping for the table. The command remains highlighted to show that wrapping is enabled. You can click it again to turn it off.

Automatically save table settings

Some table settings for some types of tables save automatically when you change them and are restored on next access. Persistence of table settings differs somewhat depending on the type of table.

- An objectSet table in **Summary** view: the last settings in effect for column sorting, text wrap and saved filters save automatically when you navigate away. The settings are restored the next time you access the same table and they persist until you change them.

- Primary work area tables, such as the **Folders** table: settings for text wrap, column sorting, and column arrangement persist automatically only if a server-side column configuration for the table exists.

- Search results table: changes you make to table settings do not persist when you navigate away.

Reset all table settings

You can reset a table to its default configuration by selecting the **Reset** command in the **Arrange** panel.

> Warning:
>
> Resetting a table removes *all* saved options (sorting, filtering, text wrap) and column arrangements and restores the default configuration. For tables with many saved options and column arrangements, consider explicitly removing only the ones you no longer need rather than performing a reset.

Modify table and tree appearances

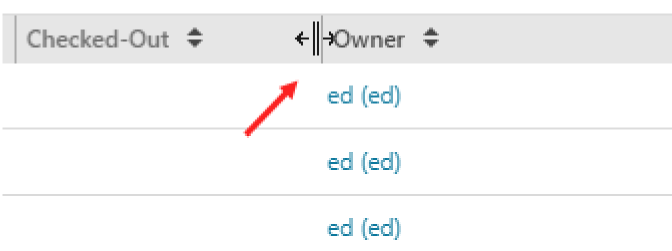
You can modify the display of tables and tree views in several ways.

- Change column widths.
- Hide columns.
- Freeze and unfreeze columns.

Change column widths

You can easily change the column widths for either **Table** or **Tree** views.

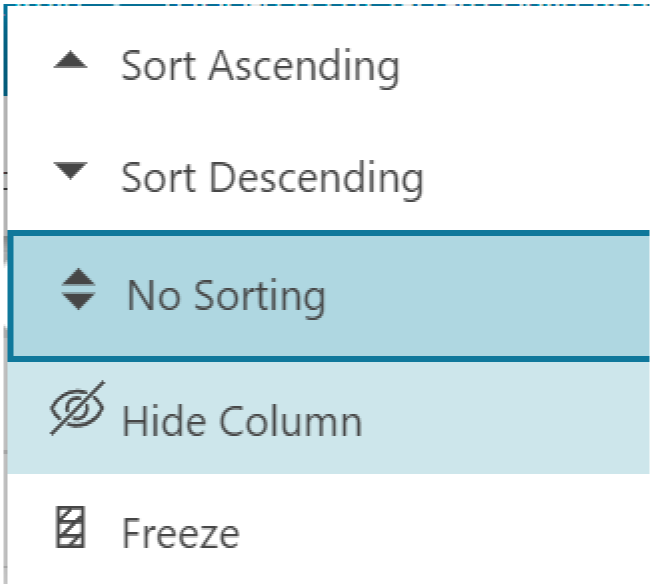
Tap or hover at the far-right of a column in the column header to display the column divider indicator and drag it to the left or the right.



Hide Columns

Columns that contain information that you do not need can be hidden from the table view.

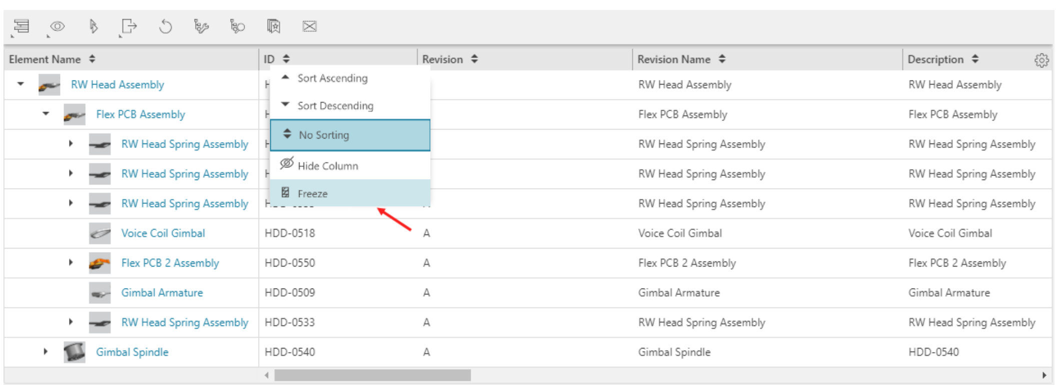
To hide columns, click the column header, then click **Hide**.



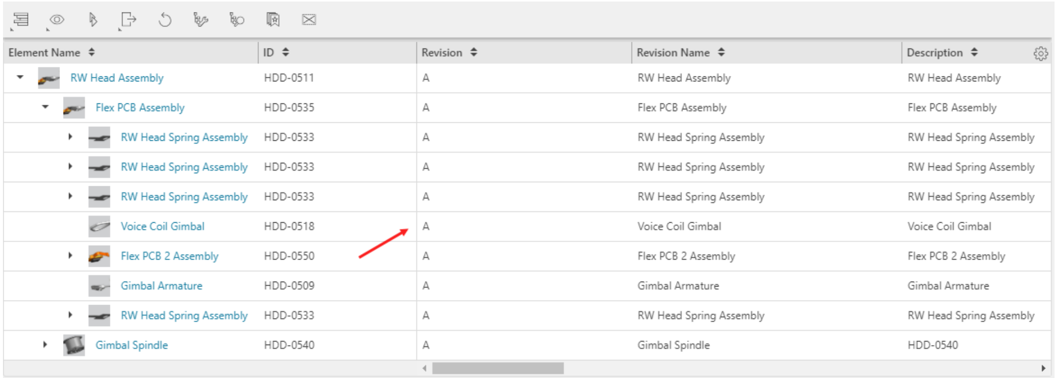
Freeze and Unfreeze columns

The first column is frozen by default for **Table** and **Tree** views. This is indicated by a dark right column border.

To freeze additional columns, click the column header, then click **Freeze**.



The column (and all the columns to the left) are frozen, meaning they are not part of the horizontal scrolling region.



Element Name	ID	Revision	Revision Name	Description
RW Head Assembly	HDD-0511	A	RW Head Assembly	RW Head Assembly
Flex PCB Assembly	HDD-0535	A	Flex PCB Assembly	Flex PCB Assembly
RW Head Spring Assembly	HDD-0533	A	RW Head Spring Assembly	RW Head Spring Assembly
RW Head Spring Assembly	HDD-0533	A	RW Head Spring Assembly	RW Head Spring Assembly
RW Head Spring Assembly	HDD-0533	A	RW Head Spring Assembly	RW Head Spring Assembly
Voice Coil Gimbal	HDD-0518	A	Voice Coil Gimbal	Voice Coil Gimbal
Flex PCB 2 Assembly	HDD-0550	A	Flex PCB 2 Assembly	Flex PCB 2 Assembly
Gimbal Armature	HDD-0509	A	Gimbal Armature	Gimbal Armature
RW Head Spring Assembly	HDD-0533	A	RW Head Spring Assembly	RW Head Spring Assembly
Gimbal Spindle	HDD-0540	A	Gimbal Spindle	HDD-0540

To unfreeze columns, click the column header and click **Freeze** again.

Note:

You can't unfreeze the first column in the **Table** or **Tree** views.

Filter data in a table column

You can filter the data within a table column so you can easily see the data that is important to you.

Tip:

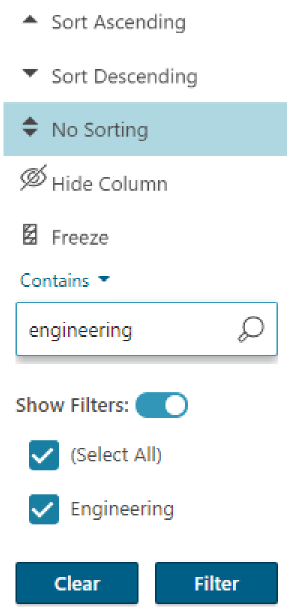
Column filtering is not supported in **Table** and **Table with Summary** views in search results.

Note:

You can click a column header and then select **Hide Column** to hide an entire table column. To show the column again, click ⚙ to the right of the column headings to open the **Arrange panel**. From here, you can add the hidden column back to the table.

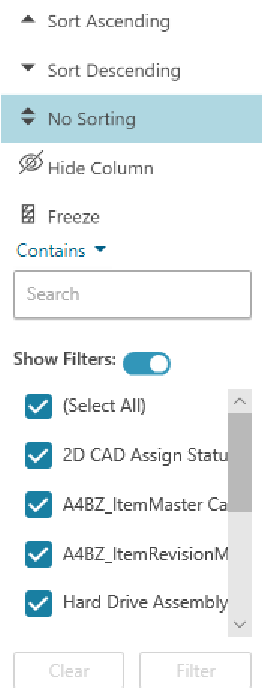
To access the filtering, click anywhere in the header of the table column to filter. There are four types of filters available depending on the types of data; text filtering, facet filtering, date filtering, and number filtering.

- Text filtering enables filtering for any table column that contains text.



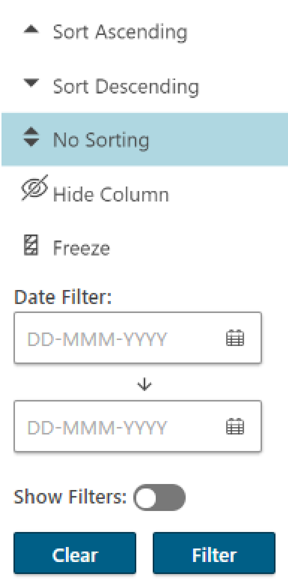
- Do not use wild cards. Just enter a text string to filter on and click **Filter**.
- You don't need to differentiate between upper and lower case.
- When you enable facet filtering by clicking **Show Filters** for the column, Active Workspace automatically narrows the list of values as you type the text.
- The default matching mode for text filtering is contains, which shows all values that contain the specified filter criteria. You can change to other matching modes, such as **Does not contain**, **Begins with**, **Ends with**, **Equals**, and **Does not equal**.

- Facet filtering displays all the available values in table columns, based on the current table values and the filter criteria entered.



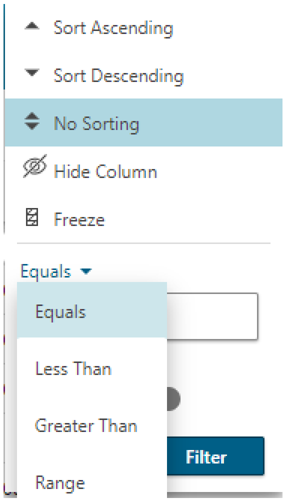
Click **Show Filters** to view the values for the table column. You can select the values you want to filter by, and then click **Filter** to show only the selected values.

- Date filtering enables filtering for table columns that contain dates.



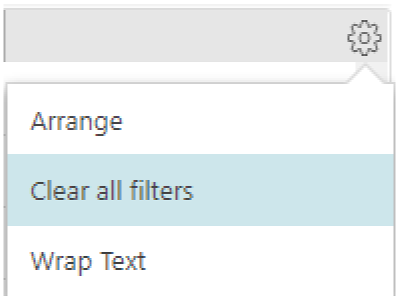
You can set a single date or a date range using the pop-up calendar.

- Number filtering enables filtering for table columns containing numeric data.



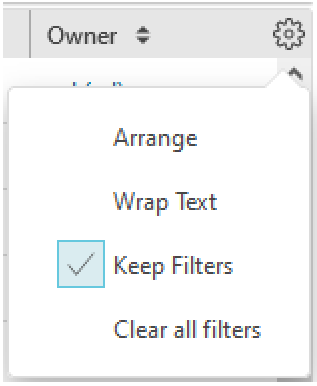
To remove filters:

- To clear an individual column filter, click **Clear**.
- To clear all filters, click the **Table Settings** icon to the right of the column headings and then select **Clear all filters**.



Keep filters between views

Unlike other settings such as sorting and text wrap, filters you set do not automatically persist when you navigate away. After you have set filters, if you want to save them so that they are reapplied automatically next time you view the table, select the **Table Settings** icon to the right of the column headings and then select **Keep Filters**.



The state of the **Keep Filters** option persists until you deselect it or select **Clear all filters**. The state of the **Keep Filters** option is also cleared, and the option is hidden if you remove all the table filters using **Clear all filters** or the column menu.

> Note:
>
> Saving column filters is not supported in **Table** and **Table with Summary** views in search results.

Guided navigation using the Teamcenter Assistant

The Teamcenter Assistant

The Teamcenter Assistant suggests the next possible actions to perform and provides the relevant data required to perform them. These suggestions are based on the context, history, and usage frequency of actions performed by other previous users belonging to the same role and group.

When you perform tasks in Active Workspace, the system remembers the commands and the sequence in which the tasks are performed. The next time you, or other users who belong to the same role and group as you, log on to Active Workspace, the system displays a set of commands based on the learning. You can either accept the commands suggested in the panel to complete your tasks or ignore them. The Assistant dynamically updates the sequence of tasks performed in each session. It learns the command usage and recommends the relevant command depending on the context for subsequent sessions.

Experienced users can log on to Active Workspace using special user credentials and train the Assistant on their preferred way of completing their tasks.

The Assistant panel displays your recent data, your team's recent data, your favorites, and the contents of the clipboard.

By suggesting the next logical commands, the Assistant helps to:

- Improve your efficiency by reducing the cognitive load.
- Minimize the number of mouse clicks required to perform your tasks.

- Reduce the total time required to complete a task.

> Note:
>
> On Support Center, you can find a video "Using the Teamcenter Assistant" that shows how the Assistant can be used to guide new or occasional users to complete their tasks. Open Teamcenter documentation for your Active Workspace version and search for the topic **The Teamcenter Assistant**.

Train the Assistant

You can use the **Tutor Mode** to train the Assistant to learn a preferred way to complete a task.

1. Log on to Active Workspace using the credentials of a user profile that is specifically set up for training the Assistant.

2. In the global navigation area, click **Assistant** .

3. Click to pin the **Assistant** panel.

4. Turn on the **Tutor Mode** and start performing the steps required to complete your workflow.

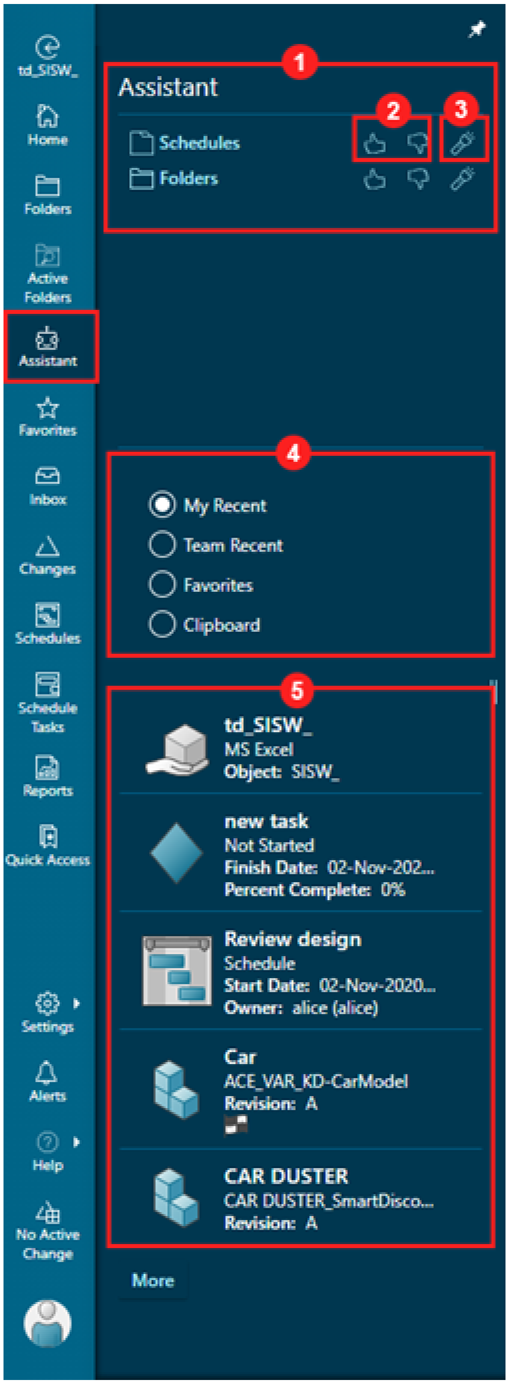
   The system records your preferred way of completing the task.

5. Turn off the **Tutor Mode** when you complete your task.

Now, when other users log on to Active Workspace, the system recommends the commands that were used in the **Tutor Mode**. This can help companies leverage the experience of experts and standardize the use of good practices.

The Assistant panel

When you log on to Active Workspace, you can view the **Assistant** icon in the global navigation area.



1	View up to 10 commands suggested by the **Assistant** panel. These command suggestions are specific to a user. If the current user is logging on for the first time, the system generates the suggestions from the history of other users belonging to the same group and role.
2	Like or dislike commands suggested in the panel to prioritize the use of one command another.

The availability of these options can be configured using a preference.

3 View the location of the suggested command on the Active Workspace user interface.

The availability of this option can be configured using a preference.

4 View the options to change the data displayed in the **Assistant** panel.

My Recent – View your recently created or modified data.

You can view up to 20 objects. The number of objects you want to display can be configured using preferences.

Team Recent- View the data created or modified by users in the same group and project.

You can view up to 20 objects. The number of objects you want to display can be configured using preferences.

The types of objects you want to display can be configured using preferences.

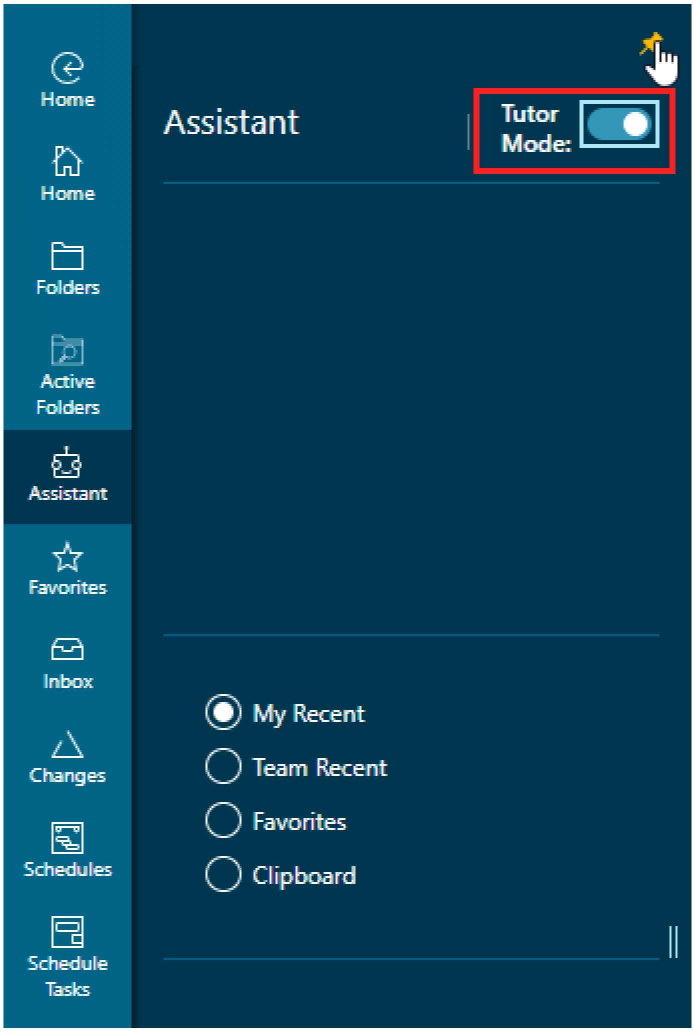
Favorites – View your favorites.

Clipboard – View the clipboard data.

5 View your data or your team's data.

The **Tutor Mode** is available when users log on to Active Workspace using a specific user profile that is set up for training the Assistant and when they pin the **Assistant** panel. Use this mode to **train the Assistant** to complete tasks in a preferred way.

The availability of the **Tutor Mode** can be configured using a preference.

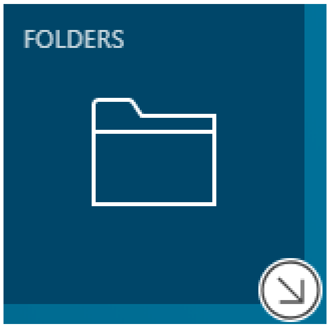


Modifying your home page

Resize a tile

Active Workspace allows users to customize their Home page in various ways to optimize their working experience. One customization is resizing the tiles.

1. Right-click the tile you want to resize, or left-click and hold the tile until you see an arrow button in the lower-right corner of the tile.



On a touch device, tap and hold a tile to enter edit mode.

2. Click the arrow button in the lower-right corner of the tile.

   Depending on the current size of the tile, the tile either shrinks to a smaller size or grows to a large one.

   Some tiles, like the **Inbox**, display different information depending on the tile size.

3. To save your changes, click in a blank area on the home page.

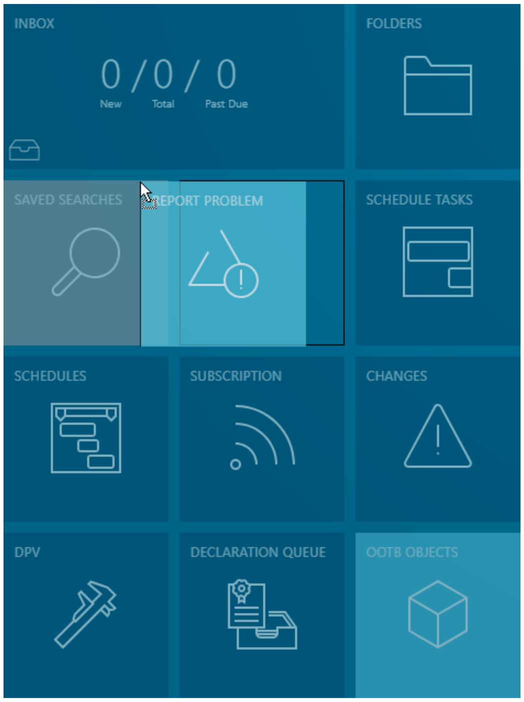
Arrange tiles

Tiles are arranged in groups on the home page. You can drag and drop tiles to create new groups, rearrange the tiles within a group, or move tiles between groups.

To move a tile from one group to another:

1. To select a tile to be moved, right-click with the mouse, or press and hold on touch devices.

2. Drag it to the new group and position near an existing tile, until you see the outline indicating the new tile position.

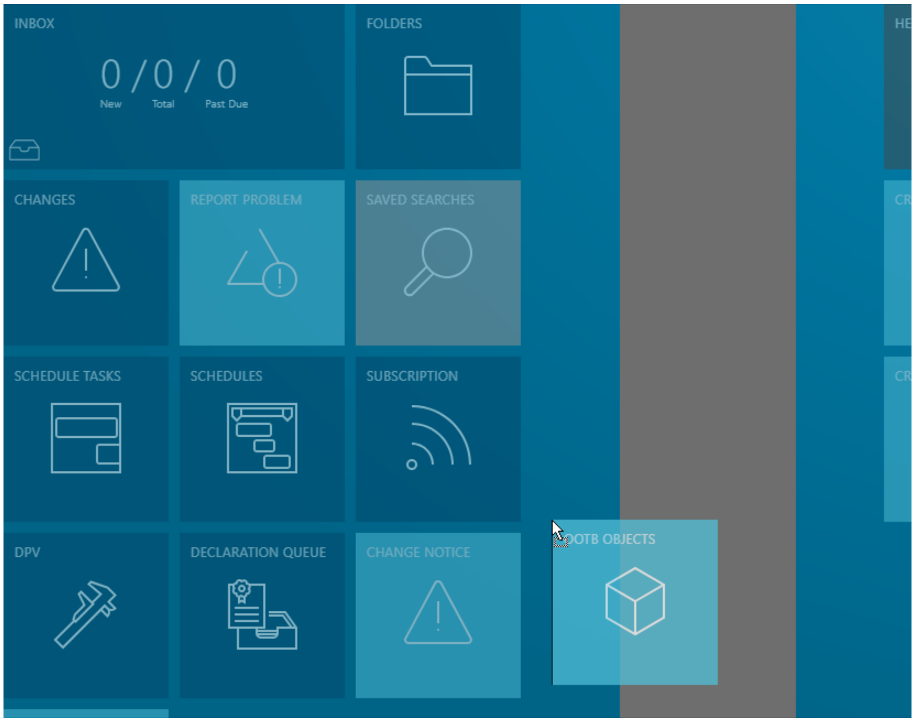


3. Drop the tile in the new position.

To move a tile and create a new group:

1. To select a tile to be moved, right-click with the mouse, or press and hold on touch devices.

2. Drag it to an area between existing groups until you see the vertical bar indicating the new group position.



3. Drop the tile.

   The tile is displayed in the new group.

Pin an object to the home page

You can pin objects to your home page to more easily access them when needed.

1. Select the object you want to add to your home page. You can add the object from locations such as your **Home** folder, favorites, or search results.

2. On the primary toolbar, click **Manage** > **Pin to Home**.

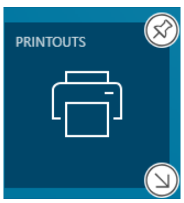
   The object is pinned to your home page. Object data, such as the ID, revision, and description display above the pinned object.

> Note:
>
> If the text for the pinned object is long, some of it will not display above the object. You can hover over it to see all of the text.

Unpin a tile from the home page

You can pin objects to your home page to more easily access them when needed. You can unpin pinned objects later on if you wish.

1. Right-click a tile, or left-click and hold a tile until you see additional controls on the corners of the tile.

   On a touch device, tap and hold a tile to enter edit mode.

2. Click unpin in the upper right corner of the tile.

   > Note:
   >
   > If you do not see unpin in the upper right corner of the tile, an administrator has protected the tile to prevent it being unpinned.

To unpin an object from the home page while you are on a different page, select the pinned object and click **Manage** > **Unpin from Home** on the primary toolbar.

> Note:
>
> Administrators can repin default tiles.

Updating your logon options

Change your password

When the Teamcenter installation is configured to use Security Services, passwords are managed by an external identity service provider (for example, lightweight directory access protocol) rather than Teamcenter. In this circumstance, you cannot change a password through Teamcenter or Active Workspace. If passwords are managed by Teamcenter,you can follow the steps in this topic to change your password.

1. From the global navigation, click your profile icon and select **Profile**.

2. From your **Profile** page, select **Manage** > **Change Password** .

3. In the **Change Password** panel, type your current password.

4. Type your new password.

5. Type your new password again in the **Confirm New Password** box.

   The **Change** button displays when all three fields are populated with valid values.

6. Click **Change**.

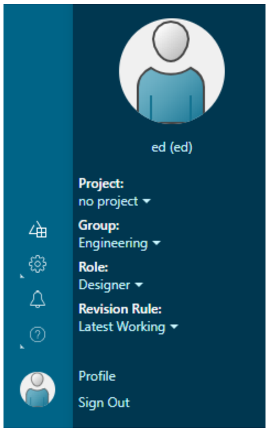
Change your group, role, or project for your session

As you use Active Workspace, you may need to change your current group, role or project. For example, you might need to switch your group from Manufacturing to Engineering to accomplish some task.

1. From the global navigation, click your profile icon.

2. Select your existing project, group, or role.

   > Note:
   >
   > Although your account may not be configured to display a project, you can view your projects and your project team by selecting the **PROJECTS** tile on the home page.



3. From the list of available options, select the one you want.

Example:

In your current session, if you change your current group from Manufacturing to Engineering, your role is set to the default role specified for the Engineering group. If no default role is specified, then the first role in the list is used.

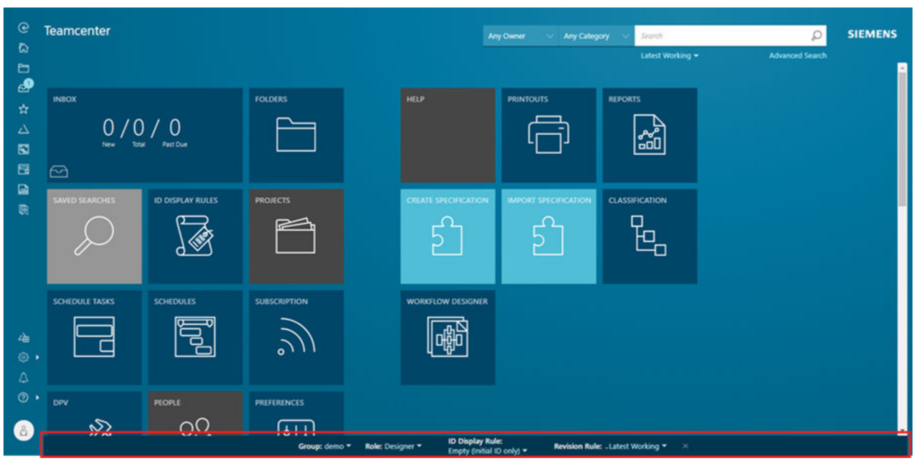
Note:

Your selected group and role are set for your current session only; the default values for your group and role are not updated.

You can manage your default group and role values using the **Profile** page.

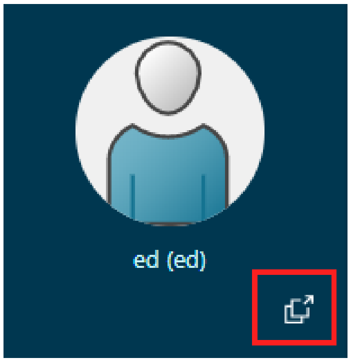
Pin user profile settings to bottom of browser window

As you use Active Workspace, you may need to change your group, role, ID display rule, and revision display rule. You can choose to pop out these user profile settings and pin them to the bottom of the Active Workspace browser window. This allows you to quickly changes these settings when needed as they are always displayed.



1. From the global navigation, click your profile icon.

2. Click **Pop Out User Properties** to pin the profile settings to the bottom of the browser window.



3. To unpin the user profile settings from the bottom of the window, click **Close** ☒.

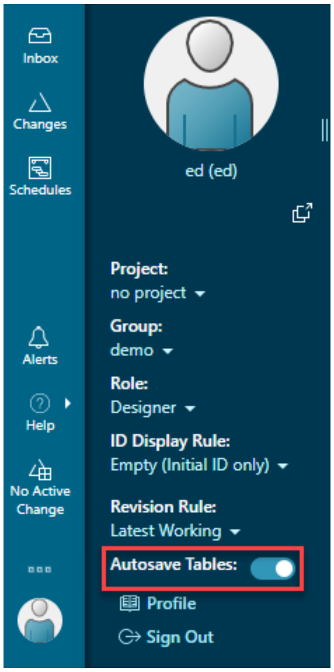
   Alternatively, you can also click your profile icon from the global navigation and then click **Return User Properties** to unpin the user profile settings.

Autosave table edits

You can toggle the option to automatically save changes made to tables. When this option is enabled and you edit a table cell by double-clicking it, the changes made to the cell are automatically saved when you click off the cell.

- If you edit a table with autosave off, you must save the changes made to the table cells by clicking **Save Edits**.
- Some table cells may not support autosave. You must manually save changes made to these table cells.
- Some tables may only support autosave editing. In this case, changes made to the cells are automatically saved, even if you have autosave turned off in your profile.
- If you enable **Autosave Tables** while you have unsaved table edits, Active Workspace prompts you to **Save** or **Discard** the table edits before enabling autosave.

1. From the global navigation, click your profile icon.
2. Click **Autosave Tables** to turn on auto saving of changes made to table cells.



Note:

By default, **Autosave Tables** is enabled for all Active Workspace users

Change your revision display

A *revision* is a unique, specific iteration of a previously created object such as a part, an assembly, or a document.

- A revision can have associated CAD models, drawings, or specifications that are applicable only to that revision.
- Revision display is controlled by *revision rules*.

  For example, **Latest Working** is a standard default revision rule for design engineers, while a manufacturing engineer may prefer to use the **Latest Released** revision rule.
- Revision rules are configured by administrators to specify which revisions of parts and assemblies display.

Multiple revisions of an object can clutter your display. You can select the rule that best meets your needs.

1. From the global navigation, click your profile icon.
2. In the **Revision Rule** section, click the down arrow next to the current revision rule and then select the new rule from the list.

Select your geography

You should set your declared geographic location in your profile. This is especially important if some data is restricted to certain geographic areas.

1. In global navigation, click your profile icon and select **Profile**.
2. On your **Profile** page, select **Edit** > **Start Edit** .
3. In the **LOCATION** area, select your declared geography from the **User Declared Geography**list - for example, **US** to indicate United States of America.

   The values are case sensitive.
4. Select **Edit** > **Save Edits** .

Manage your group, role, or volume from your Profile page

In addition to being able to manage your group and role by clicking your profile icon, you can also manage your group, role, or volume from your **Profile** page.

1. From the global navigation bar, click your profile icon and select **Profile**.
2. From your **Profile** page, select **Edit** > **Start Edit** .
3. In the **USER MEMBERSHIPS** area, you can change your default group, default volume, and default role.

   For example, select Engineering as a default group and Designer as a default role. From the **Default Group** list, select **Engineering**. From the corresponding **Default Role** list, select Designer.

   If you are only assigned one group or role, you cannot select another group or role.
4. To change your default volume, select a volume using the **Default Volume** list.

   If you are only assigned one volume, you cannot select another volume.
5. When you are finished with your selections, select **Edit** > **Save Edits** .

Create and change ID display rules

Create an ID display rule

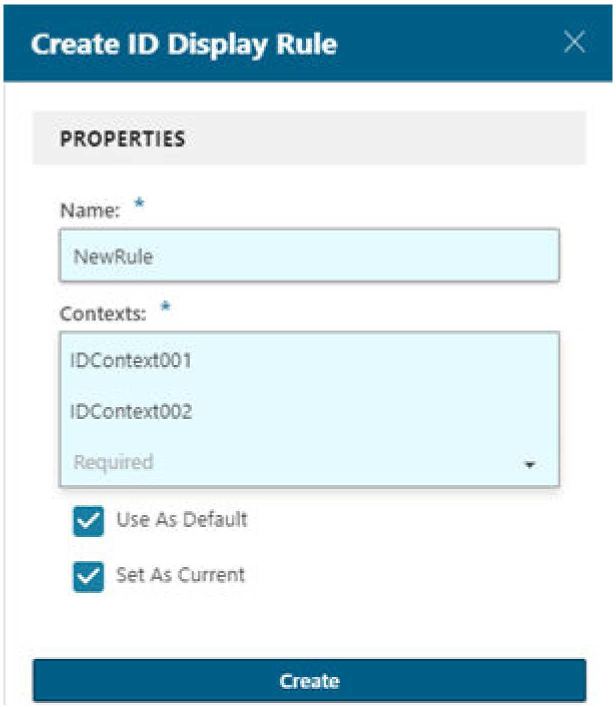
You can create a custom ID display rule to display objects with alternate IDs for a specified ID context.

1. From the Active Workspace **Home Page**, click the **ID DISPLAY RULES** tile.

   The **ID Display Rule** page opens and displays any existing rules.

2. From the primary toolbar, click **New** > **Create ID Display Rule** .

   The **Create ID Display Rule** panel opens.



3. Enter a **Name** for the rule and then select the rule **Contexts** from the list.

4. (Optional). Click **Use As Default** to set the new rule as the default ID display rule.

5. (Optional). Click **Set As Current** to set the new rule as your current display rule after it's created.

6. Click **Create** to create the new display rule. The new rule now appears on your **ID Display Rule** page.

Change your ID display rules

When you have created alternate IDs for objects, you can change your **ID Display Rule** to display these custom IDs in your bill of materials instead of the default value for the revision object.

1. From the global navigation, click your profile icon to display your user properties.

Tip:

You can optionally move the User Properties bar to the bottom of the browser window to keep it visible at all times. This is helpful if you have to cycle through many ID display or revision rules.

2. Click the down arrow next to **ID Display Rule** and then select the rule you want to apply.

Note:

The available ID display rules are based on the alternate ID context configured by your administrator.

Your alternate IDs now display for the revision object.

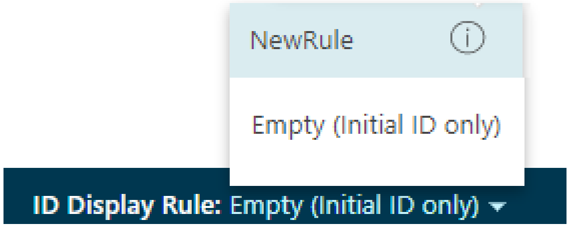
View ID display rule information

You can quickly view information on an ID display rule when viewing it from a list of your existing rules.

1. From the global navigation, click your profile icon to display your user properties.

2. Click the down arrow next to **ID Display Rule**.

3. Instead of selecting a rule, hover over it and then click the **Information** icon ⓘ.



The **ID Display Rule** page opens and displays the details on the rule.

Set or change your company location assignment

After your administrator creates and assigns company locations, you can set, clear, or change your company location assignment in Active Workspace:

1. From the global navigation, click your profile icon and select **Profile**.

2. From your **Profile** page, select **Manage** > **Location Code**.

3. Type your location in the **Available Locations** box to start the filter action to locate your location code.

 > Note:
 >
 > The associated location code may contain the filtered string. For example, "Mi" is contained in the location code, Milwaukee, associated with Wisconsin. It is also contained in the location code, Milford, associated with Ohio.

 > Tip:
 >
 > To set your location to a value not in this list, type the location you want to assign to yourself in the **Location Code** box. The following message is displayed:
 >
 > ```
 > Location Code "zzz" does not exist for any Company Location.
 > Do you want to set a new location with that code?
 > ```
 >
 > Click **Set**.

4. Select a location and click **Set**.

Change location on parts and documents

When you create a part or a document in Active Workspace, your company location appears as a value in the **Current Location Code** box on that part or document. If your system configuration allows, you can change the location code to a code already in the system.

3. Finding data in Active Workspace

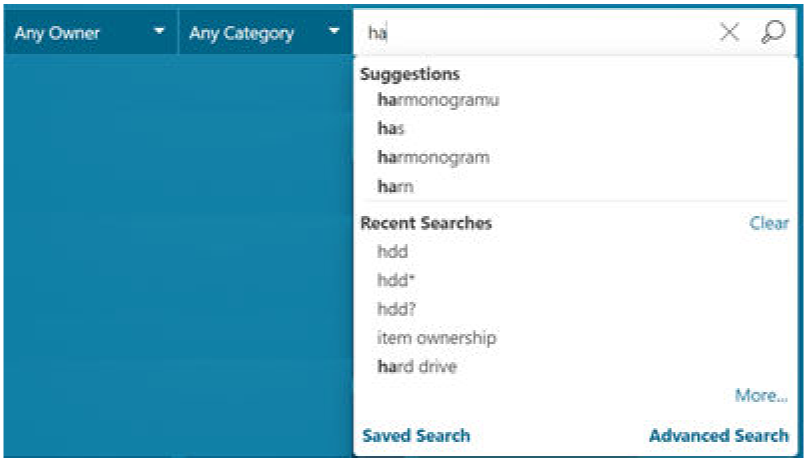
Searching for data

Throughout a product's life cycle, you need to keep track of multiple drawings, attachments, and item revisions. In Active Workspace, there is no need to remember folders or directories where this data is located. Instead, you can use built-in search features to locate any data stored inside Teamcenter.

In addition to locating all possible results, you can refine your search, save and pin your search, and export your results. During your project, you may want to see all matches that contain the **name of the project** you are working on. Or you may want to search the database for parts with a **similar shape or size**.

Return matches to a text search

Place your cursor into the **Search** box located in the top right corner in Active Workspace.



- Begin entering your search term in the search box.

  Suggestions and **Recent Searches** are displayed according to what you type. Recent searches are saved during your current session unless you choose **Clear**.

  Index term stemming is applied to all indexed fields. For example, a search for **shielding tile** also returns objects with the string **shield tile** in any indexed field.

- Click **Saved Search** to access your list of **saved searches**.

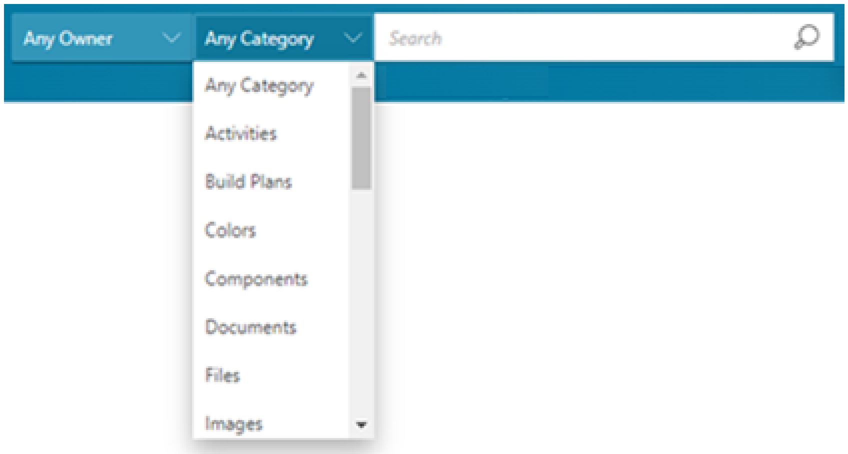
- Click **Advanced Search** to **return matches using advanced search templates**.

Active Workspace displays all search results.

To refine your search:

- Narrow the scope of your search with a prefilter.

  Prefilter lists are configured by your administrator. For example, you might see **Any Owner** and **Any Category** lists.



- Change the scope of your search by choosing a **revision rule**.
- Refine your search criteria using **Boolean operators and other techniques**.
- **Ignore common words** in your search criteria.

Work with your search results:

- **Choose a view for your results**.
- **Filter your results**.

  Apply filters from a list of categories and properties. You can remove filters using the **breadcrumb in the header area**.

- Display results by category in a **chart**.
- Apply **highlights for matching search terms or use filter colors**.
- **Save and pin your search criteria**, including your filters and chart view, to use or refine later.

  You can pin the search and access it from your home page. You can also access your saved search from the **Saved** page in the **Search** header and share it with others.

- **Export your search results** to Microsoft Excel or Microsoft Word.

You can also personalize your search settings to change the behavior of the **Filters** panel and how results are displayed.

Return matches with a similar shape and size

When building an assembly, you might want to search for existing components that match a similar shape or size. If the object is indexed for Shape Search, your search results can also display these similar objects.

Shape Search is enabled and configured by your administrator.

Return matches using advanced search templates

Your tasks may require you to search often and always against the same fields. For example, each week you may want to ensure that approved parts were not changed. You search for all objects in various projects that were modified the previous week with a **Release Status** of **Approved**.

Instead of typing your search criteria for multiple fields into the search box, you have the option of using search templates that provide you with a form containing just the fields you want to search against. For this example, enter your search criteria into a template containing fields for **Name**, **Description**, **Created After**, **Created Before**, and **Release Status**.

Active Workspace provides several standard templates for your use. Additional templates can be configured by your administrator.

You can refine your advanced search using wildcard characters, delimiters, and cascading lists of values.

You can choose a search from **Preferred Searches** in the **Advanced** search list. Preferred searches are displayed first. You can add or remove a query by selecting it and clicking **Preferred**.

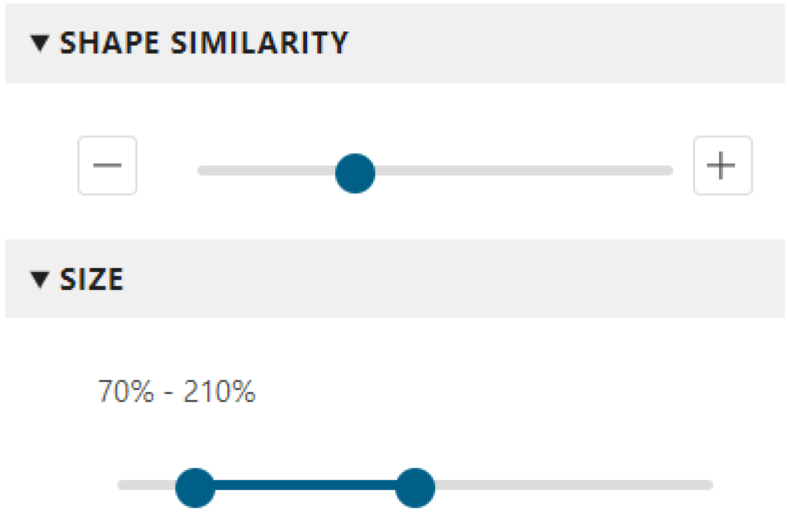
Organize your searches

You will likely use a combination of text searches and template searches to find the data you need. To organize, save, and share these searches in one place, use active folders.

Return matches with similar shape and size

If shape search is configured, you can activate it prior to performing a search by clicking the **SHAPE SEARCH** tile. To activate it after a search, select **Shape** in the header area. In the **Shape Search** panel, select a shape indexed for shape search and click **Search Similar**.

If you perform a shape search on a specific magnet within a computer disk drive, all parts similar in shape to the magnet are displayed. In the **Filters** panel, you can choose to apply similarity and size filters to your shape search results.



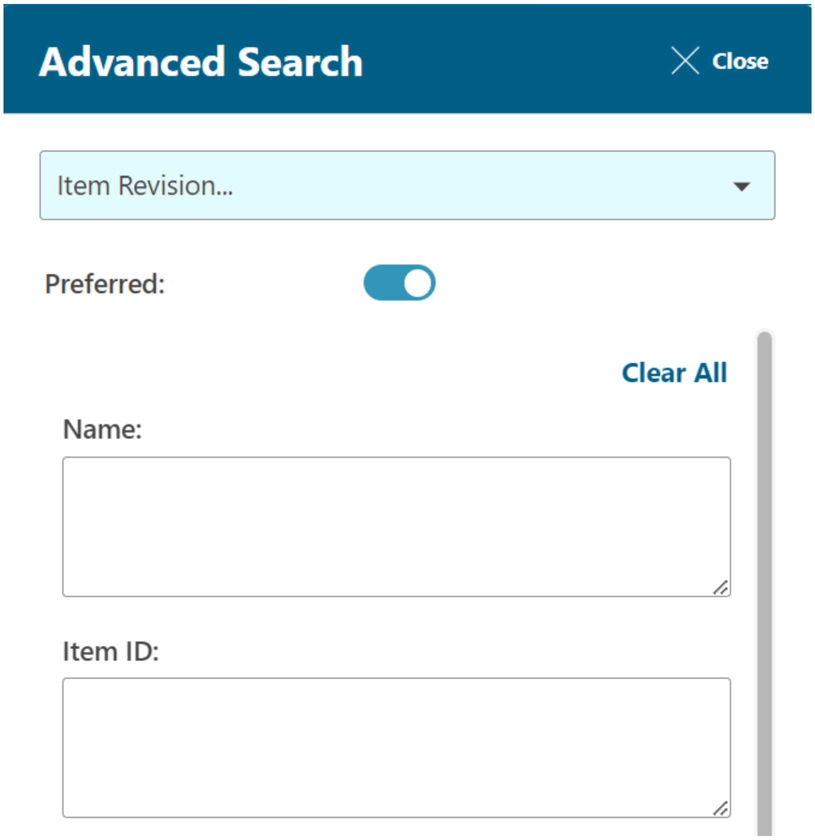
- The **Shape Similarity** slider specifies the level of similarity for matching results. Moving from identical to similar broadens the search and retrieves more results.
- The **Size** slider specifies the minimum and maximum size for matching results. Size is a percentage of the referenced object and not a specific dimension.

Return matches using advanced search templates

Use an advanced search template if you often search against the same set of fields. Advanced search provides templates that help you search quickly by displaying only the fields you need.

For example, maybe you often search for item revisions with different item IDs, created after a certain date, and with a specific **Release Status**. You can use the **Item Revision** template and enter your search criteria into the **Item ID**, **Created After**, and **Release Status** fields.

To access all available advanced search templates, click **Advanced Search** from the **Search** box or from the **ADVANCED SEARCH** tile to open the **Advanced Search** panel. The most recently used search template is displayed.



To use advanced search:

- Choose from a list of predefined queries that are configured for your site. Queries have additional criteria that narrow the results.
- Prioritize your frequently used advanced search queries by assigning them as **Preferred**.
- Search for results with similar information by using **wildcards**.
- Search for information by specifying a part of the value using **wildcards**.
- Search for information using criteria with **delimiters**.

When viewing your results you can:

- **Choose a view for your search results**.
- **Export your search results** to Microsoft Excel or Microsoft Word.
- **Save and pin your search criteria** to use later.

  Access saved searches from your home page or from the **Saved** page of the **Search** header.

Several templates can be used when advanced search is made available by your administrator. Your administrator can also create custom templates.

Refine your search

Apply a revision rule to your search

A revision rule refines your list of returned objects to those that meet the rule criteria. Change your revision display to refine your list of results. For example, to find all working objects with any status and having **bolt** in their name, choose the revision rule **Any Status; Working** and enter **bolt** in the search box.

Return matches with patterns using a wildcard

You can use the * wildcard to return all results matching the initial search term.

By default, the search adds an implied wildcard asterisk (*****) character to the end of each search term. Entering **HDD 0500** automatically performs a search for **HDD* 0500***. This search returns all results starting with **HDD** and **0500**, such as **HDD 050002** or **HDDA 050055**.

You can use the * wildcard to search for characters in individual search terms. Using * does not support search phrases as it does not apply to spaces between terms. For example, **fue*conomy** does not find **fuel economy**, but **fue* *conomy** does.

You can use the * wildcard with **NOW** for date searches. For example, **"last modified date":[* TO NOW]** returns everything until the present day. **NOW** must be all uppercase.

Siemens Digital Industries Software recommends that the wildcard (*) be used cautiously for non-indexed structure search because it might adversely impact search performance.

Particularize matches using special characters

You can return exact matches using quotation marks (**" "**). Without quotation marks, index term stemming is applied to all indexed fields and the search returns matches with the string from the stem word in any indexed fields.

For example, a search for **"Shielding Tile"** returns objects with the string **shielding tile** in any indexed fields. A search for **shielding tile** also returns objects with the string **shield tile** in any indexed fields.

You can specify the matches returned by using the following special characters. Be sure to enclose your search criteria in quotation marks (**" "**).

( ) { } [ ] - :

Numerical value range searches can be inclusive **[ ]**, exclusive **{ }**, or mixed (**[}** or **{]**), using syntax similar to other **property** or **date** searches.

Expand searches with Boolean operators

You can use Boolean operators to expand searches by including associated terms or prohibiting specific terms.

The default Boolean operator applied for all keywords in a search term is set by your administrator.

Search for two terms

AND	**bolt AND nut** returns objects with the words **bolt** and **nut** in any indexed fields.

Prohibit a term from the search

NOT	**bolt NOT nut** (or **bolt –nut**) returns objects that contain **bolt** but do not contain **nut** in any of their indexed fields.

Search for terms with multiple associations

AND (OR)	**"Part revision" AND (Dan OR Sally)** returns objects that are a **part revision** or contain a **part revision** associated with users named **Dan** or **Sally**.
(AND) OR	**(chrome AND matte) OR aluminum** returns objects that either contain both **chrome** and **matte** together or **aluminum**.
AND AND (OR)	**"Dan Designer" AND "Engineering Group" AND (motor OR "main axle")** returns objects that contain both **Dan Designer** and **Engineering Group** in addition to **motor** or **main axle**.

Specify property searches

You can search Active Workspace for indexed properties of objects. You can specify property searches using the special characters listed in this topic.

Colon (:)	**owner:john** Search on indexed property values using the property display name. Display names must be separated from search values by the colon (:) character.
Quotation marks and colons ("":)	**"Group ID":engineering** Use quotation marks for display names with spaces and property values with spaces.

Quotation marks for property values with parentheses.	If the property is: **Name: (test)** Then enter the search criteria: **Name: "(test)"**
Numerical value range	**ID:[000001 TO 000050]** Search for a range of numerical property values using **TO** and **[ ]**. **ID: [000001 TO 000050] OR ID:[000075 TO 000100]** You can combine date range with other search tools for more precision, for example, **AND**, **OR**, and **" "**. Numerical value range searches can be inclusive **[ ]**, exclusive **{ }**, or mixed (**[}** or **{]**), using syntax similar to other property-specific searches.
Combine property and term searches	**"group id":engineering motor itemrevision** This search finds objects that have engineering as the group ID property and that have the words **motor** and **itemrevision** in any indexed fields.
Name-value property search	Your organization can create name-value properties to display name-value pairs in a tabular format. These name-value pairs represent characteristics not defined in the persistent properties for a business object. Consider that your company has created a **MyNameValueProperty** name-value property. A search for **MyNameValueProperty.name:a5_part_id** returns everything with a **MyNameValueProperty** name-value property having a **a5_part_id** name. **MyNameValueProperty.name:a5_part_id AND MyNameValueProperty.value:000075** returns everything with the **MyNameValueProperty** name-value property having a **a5_part_id** name with a value of **000075**. When you search for the value of the name-value property, you *must* use the **AND** operator or separate the name expression and the value expression with a space. While you can search for the **name** portion of a name-value property by itself, you cannot search for the **value** portion by itself. You cannot use the **OR** operator with the **value** portion. The **AWS_Default_Query_Operator** preference is not honored by name-value search, and the default operator is always **AND**.

The provided name and value expressions must be in pairs and in order. That is, each value expression must be preceded by its corresponding name expression. A name expression cannot be supplied after its value expression.

Valid: **MyNameValueProperty.name:a5_part_id AND MyNameValueProperty.value:000075**

Invalid: **MyNameValueProperty.value:000075 AND MyNameValueProperty.name:a5_part_id**

All other search operators apply. For example, you can search for display names using **" "** and numerical ranges using **[TO]**, and perform wildcard searches with ***** (the asterisk).

Specify date searches

You can specify date searches using the following special characters.

Search date range	Date searches are property specific, and the search format is year, month, and day, as in **2015-08-24**. Date range searches can be inclusive **[ ]**, exclusive **{ }**, or mixed (**[}** or **{]**}, using syntax similar to other property-specific searches. Date searches can use the asterisk (*****) wildcard or the **NOW** keyword, which represents the current date and time in minutes and seconds and can include other properties. Inclusive date search: **"last modified date":[2015-08-24 TO 2015-08-26]** returns everything from August 24 to August 26, including August 24 and August 26. Exclusive date search: **"last modified date":{2015-08-24 TO 2015-08-26}** returns everything from August 25, excluding August 24 and August 26. Mixed date search: **"last modified date":{2015-08-24 TO 2015-08-26]**, returns everything from August 25 to August 26, excluding August 24 and including August 26.
Date search with wildcard (*) and NOW	**"last modified date":[* TO NOW]** returns everything until the present day (**NOW** must be all uppercase).
Mixed date searches with NOW	**"last modified date":{2015-08-25 TO NOW] "date released":{2015-08-25 TO NOW] name:screw** **"last modified date":{2015-08-25 TO NOW] bolt**

Date search with time	You can include the time with the date value, in the format year-month-day-hours-minutes-seconds: *"YYYY/mm/dd*T*HH:MM:SS"* Be sure to enclose the date and time value within quotation marks, for example, **"2012-12-11T23:59:59"** The date and time format is supported by simple search, name-value property search, and table property search.

Apply keywords to search criteria

You can apply supported keywords to your search criteria to return specific results.

Search objects owned or last modified by the logged-in user	**Owner:$ME** returns results for all objects owned by the logged-on user. **"Last Modifying User":$ME** returns results for all object modified by the logged-on user.
Search objects for your group or your project	**"Group ID":$MY_GROUP** returns results for objects with your group in the group ID property. **"Projects":$MY_PROJECT** returns results for objects with your project ID.
Search a time frame based on days	**"Creation Date":$TODAY** returns results for all objects created today. **"Date Modified":$YESTERDAY** returns results for all objects modified yesterday. **ItemRevision AND "Date Modified":$LAST_7_DAYS** returns results for all item revision objects modified in the last seven days. You can use any numerical value.
Search a time frame based on weeks	**"Date Modified":$THIS_WEEK** returns results for all objects modified in the current week. **ItemRevision AND "Creation Date":$LAST_WEEK** returns results for all item revision objects created in the last week. The week keyword does not support a numerical value.
Search a time frame	**"Creation Date":$THIS_MONTH** returns results for all objects created in the current month.

based on months	**Owner:$ME AND "Date Modified":$LAST_MONTH** returns results for all objects owned by the logged-on user and modified in the last month. **"Last Modifying User":$ME AND "Date Modified":$LAST_3_MONTHS** returns results for all objects last modified by the logged-in user and modified in the last three months. You can use any numerical value.
Search a time frame based on years	**"Creation Date":$THIS_YEAR** returns results for all objects created in the current year. **ChangeRequestRevision AND "Creation Date":$LAST_YEAR** returns results for all change request revision objects created in the last year. The year keyword does not support a numerical value.

Ignore common words

If your search phrase contains a common word, such as **the**, **and**, **for**, or **a**, it may be ignored in your search criteria. Your administrator can configure which words are interpreted as common words.

If common words occur in a search phrase inside quotation marks, you may not find an exact match. Using quotation marks around your search phrase has the following effects:

- If a common word occurs between keywords in a search phrase enclosed in quotation marks, it is replaced by a wild card in the query.

  For example, if you search for **"Parts and sprockets"**, search checks if a single property contains both **Parts** and **sprockets**. Your search results might include **Parts sprockets** and **Parts large sprockets**.

  If you search for **Parts and sprockets** without quotation marks, search checks if multiple properties match **Parts** or **sprockets** and returns the object only if it matches both. Your search results might include an object containing a property, **Parts and sprockets**. Or, your search results can include an object containing the property **Parts** and another property, **sprockets**.

- If a common word occurs at the beginning or end of a search phrase inside quotation marks, it is ignored.

  For example, if you search for **"The parts and sprockets for"**, **The** and **for** are ignored.

Refine your advanced search

Replace unknown characters with wildcards in an advanced search

Advanced searches are predefined queries. The more criteria you enter, the more specific your search results become. Advanced searches are not case sensitive.

You can use wildcard characters, the asterisk (*) and the question mark (?), to match single or multiple characters in specific positions of a search string.

Asterisk *	The asterisk searches for the root of a word followed by one or more characters.
Question mark ?	The question mark searches for the root of a word with the question mark as a substitute for another character. For example, a search for **Anders?n** might return **anderson**, **Andersen**, and **andersin**.

Return matches for multiple criteria using delimiters with advanced search

You can search for multiple pieces of information at the same time by using delimiters. Certain delimiters are enabled by default in the **AWC_WSOM_find_list_separator** preference. You can override this preference to add or remove available delimiters.

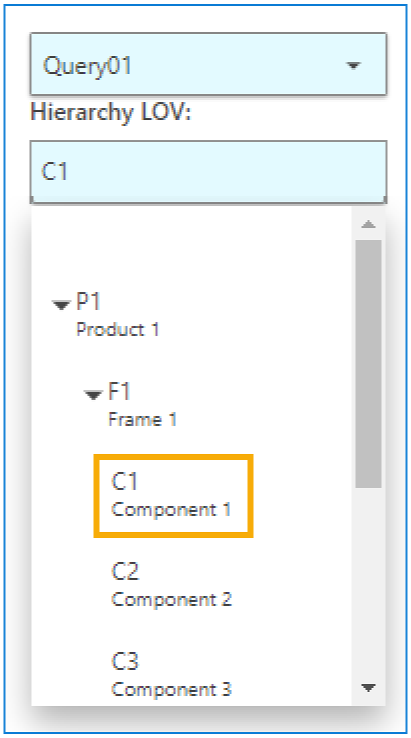
To use an enabled delimiter character, insert it between multiple search criteria. For example, a search for **HDD-0548;HDD-0544** using the **SEMICOLON** delimiter displays results for both criteria in the same search results table.

> Caution:
>
> Enabling delimiter characters also results in delimiting the existing search data in the system. If a delimiter is enabled in the **AWC_WSOM_find_list_separator** preference and the same delimiter character exists in the search data, your search results might be skewed.
>
> For example, you want to search for parts owned by a group of three users. You decide to enable the **COMMA** delimiter in the preference so that you can enter multiple names into the search criteria such as **Jones,Steve,Miller,John,Smith,Mary**. However, commas are used widely in your company's **owning_user.user_name** data because employee names are stored in the database in the format "Miller, John." When you enable the **COMMA** delimiter, **Advanced** search treats "Miller, John" as two separate pieces of data: "Miller" and "John." Therefore, your query does not return the expected results.
>
> Consider if you enable both the **COMMA** delimiter and the **SEMICOLON** delimiter. **Advanced** search still treats "Miller, John" as two separate pieces of data even if a semicolon is used as the search criteria delimiter in **Jones,Steve;Miller,John;Smith,Mary**. This is because the **COMMA** delimiter is also enabled.

Narrow your advanced search with cascading lists of values

You can narrow the results of your advanced search by selecting a specific value for the property.

If a property has a cascading list of values (LOVs), you must expand all parent values and select a child value. For example, to search for the component **C1**, expand **P1** and **F1** and select **C1**.



Work with search results

When you enter a search term in the **Search** field in the header, if Active Workspace finds objects relevant to your input, it returns a listing of these objects. This listing is called **Search Results**. This topic explains how you can view and work with the search results.

Result views

- In list or table summary view, **access the hidden tabs** if there are many tabs displayed.
- In table view, you can **modify how to display tables**.
- Switching between list views and table views preserves the sort order and selected items in your results. If you enter a new search, the sort order returns to the default order.
- In list view, snippets may show the location of search terms within file content for returned items. The snippet is displayed as a phrase under the object. Snippets provide assistance in determining where the search term is matched, especially if the displayed object name or description has no match. Snippet availability is configured by your administrator.

Toolbars

From the search results panel toolbar, you can perform a variety of actions.

- For all search types, you can:

- Click to choose the **display method**.
- Click to **save your search** to reuse later.

- For searches using the search box :
  - Click **Search Filters** to **apply property values to refine the results**.
  - Click to choose:
    - **Highlighting** to highlight the search term in the results. Highlights are available for keywords and property values.
    - **Color Filtering** to associate colors with the most common filter values. Some search results objects also display the corresponding filter value color in the results list.
  - Click **Search Settings** to configure your personal search preferences.

Explore the primary toolbar to display **commands that perform actions or open associated task panels**.

Filter search results

On the search **Results** page, you can apply available filters to narrow your search results using the **Filters** panel.

Display or close the **Filters** panel by clicking **Filters** . Selected filters are also displayed in the **search breadcrumb**.

Filter behavior is initially configured by your administrator, but you can change a few **filter panel settings** yourself.

Tips for using filters

- Search results are refreshed automatically when a filter is selected. To change this behavior, you can display the feature on the **Filters** panel by clicking **Search Settings** and selecting **Show Auto-update Filters Option**.
  - If **Auto-update Filters** is selected on the **Filters** panel, search results continue to refresh automatically when a filter is selected.
  - If **Auto-update Filters** is not selected on the **Filters** panel, multiple search filters may be selected. Click **Apply All** to refresh the search results.

- You can search the list of properties by entering text in **Filter By Property**. You can also search the list of property values using the search box for the filter.

- If you run the search again, filters and in-content search terms are cleared. If you save your search, the selected filter values are preserved.

- The **More** and **Less** commands may be displayed at the end of a property list. You can expand or reduce the length of the list.

- If **Color Filtering** is selected, colors are associated with objects in the results that match the most common filter values.

  Some objects may not display the corresponding filter value color. Typically, this happens when the properties are not defined in the data model template.

- The bar chart appears in the **List with Summary** and **Table with Summary** views when no search result item is selected.

  Apply a filter to the results from the **Chart by** list, which displays the results by property value, or from the **Filters** panel. The chart and the search results lists display the same color code for a selected filter property.

  The filter selections persist for the chart throughout the session unless you change them. You can reset the default behavior by logging off and logging on again.

- If you run a saved search, you can filter the **Updated Results** to the objects that are **New**, **Modified**, or **Unchanged** since the last time you ran the search.

Filtering by dates and ranges

Filtering dates

When a property displays date boxes, you can enter the start and end dates. Dates take the form *DD-MMM-YYYY*, for example, **29-Aug-2016**. An empty value means the date range is open.

When the filter displays the dates, they are grouped as follows:

If there is:	The date filters are grouped in:
More than one year of data	One-year increments
Between one month and one year of data	One-month increments

If there is:	The date filters are grouped in:
Between one week and one month of data	One-week increments
One week of data	One-day increments

When you click on a date range, the date filters change to the next filter grouping.

Your administrator specifies which day of the week is the first day.

Filtering numeric ranges

When a property displays numeric range boxes, you can enter start and end numeric range values.

Numeric values take the form *From- To*, for example, **.1- 1.5**. An empty value means the numeric range is open.

Filtering Multi-Site search results

If Multi-Site Collaboration is enabled at your site, you can filter Object Directory Services (ODS) published record objects from multiple locations. At Multi-Site locations, the **Filters** panel displays the **Search Site** property, where you can filter the search results to either **Local** or **Remote**. The **Search Site** is also displayed in the search breadcrumbs.

- **Local** displays the results that are indexed at the local site, which includes objects that were indexed from remote sites.

  If there are no published records available, then only local results are displayed.

- **Remote** displays the results that are indexed only from remote sites. Choosing **Remote** lets you choose results specific to the sites listed in the associated **Remote Sites** filter.

Personalize your search settings

You can configure your personal search preferences. On the results panel toolbar, click **Search Settings** to view the configurable areas.

FILTERS section

Configures **Filters** panel behavior.

Hide filters with only Unassigned values

Hides filters with values that are not assigned to any of the results. Clear the check box to display filters that have no assigned values in the search results.

Limiting expanded filters takes precedence over hiding unassigned filters. When you hide unassigned values and also specify a list of filters for **Limit filters to expand**, you may see unassigned values for filters in the **Filters to Expand** list.

Sort filter values

By count sorts the filter value list by total occurrences.

Alphabetically sorts the filter value list in alphabetical order.

Show Auto-update Filters Option

Displays the **Auto-update Filters Option** on the **Filters** panel.

If **Auto-update Filters** is selected on the **Filters** panel, search results continue to refresh automatically when a filter is selected.

If **Auto-update Filters** is not selected on the **Filters** panel, multiple search filters may be selected. Click **Apply All** to refresh the search results.

Filter Wildcard

Choose a wildcard (*) method to apply when searching property values.

Both leading and trailing wild cards applies the wildcard characters to the beginning and end of your search term.

No wild card searches only for exact matches to your search term.

Trailing wild card applies the wildcard to the end of your search term.

Leading wild card applies the wildcard to the beginning of your search term.

Display filters as

You can specify whether filters display as a list or in groups. The list of available filters and initial settings are configured by your administrator.

List displays all available filters in a list.

Group organizes filters inside predetermined groups. Groups of filters are configured by your administrator.

Expand

When filters are selected to display as a **List**, you can specify which filters are expanded. When filters are selected to display as a **Group**, you can specify which groups are expanded.

Selected Filters allows you to select specific filters from the available list to be expanded. By default, the **Category** and **Type** filters are always expanded.

All Filters expands all filters in the list.

Selected Groups allows you to select specific groups to be expanded from the available list.

All Groups expands all groups in the list.

Update Filter Values

On "Enter" Key Press runs the filter search after you enter text and press **Enter**.

As you type displays matching filter values as you enter text.

RESULTS section

Configures search results behavior.

Include results from files

Includes results found in the file content of returned items.

Clear the check box to display only matches found in the item name.

Show text snippet with results

Displays a snippet of the text matched from the file content.

This option is only available if Include results from files is selected.

> Tip:
>
> Use **Highlighting** on the results panel toolbar to display or hide highlighting on matches in the results list.

In summary view

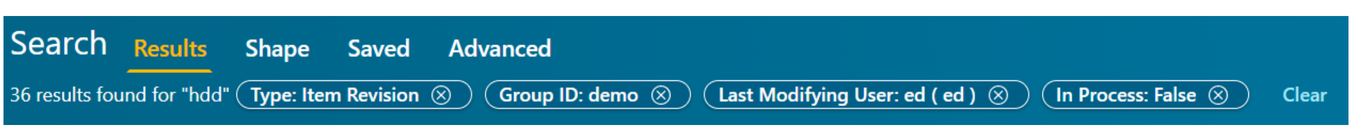
Show summary of first result displays information about the first returned result in the right pane.

Show chart of results displays the values for the chart filter category in the right pane.

Work with breadcrumbs

Breadcrumbs display information about results for all search types in the page header area. Breadcrumbs provide a quick view of all selected filters or applied criteria for your search results.

Work with search breadcrumbs



The search **Results** page displays the filters that are applied to search results. Related filter values are grouped together in the breadcrumb, regardless of the order in which you choose them. Search criteria entered in **Find in this content** appear in the breadcrumb.

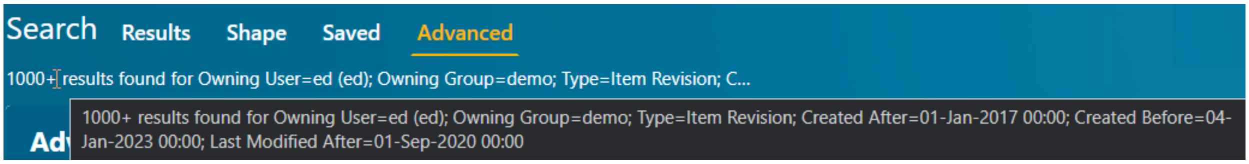
When several filters are selected, you can click **More** at the end of the breadcrumb to display additional selected filters.

The lock icon appears in the breadcrumb if there are unreadable results. Hover over the icon to view the number of unreadable results.

Click ⊗ next to a filter to remove it.

Click **Clear** at the end of the breadcrumb to remove all filters.

Work with Advanced search breadcrumbs



The **Advanced** search results page displays the criteria that are applied to advanced search results.

Hover over the breadcrumb to display all criteria applied to the Advanced search results.

> Note:
>
> The applied criteria cannot be edited in the breadcrumb.

Save and pin searches

All your searches, including advanced searches, can be saved and appear on the **Saved** search page available from the header. From the results toolbar, click **Save Search**.

Saving your searches has many benefits:

- Save all your search criteria to use later.
- Share saved searches with other users.
- Pin saved searches to your home page for quick access.
- Update saved searches when your criteria changes.

- From **Advanced** search, you can choose from a list of preferred searches that you tag as frequently used.

> Tip:
>
> Even if a search is not saved, you can choose a search from the **Recent Searches** list. These are saved by the system during your current session.

Save a search

When you save a search

Keywords are the search criteria you entered.

Filters are the filters you selected for the search.

Allow others to view shares your saved search. Sharing is configured by your administrator.

Pin to Home pins your saved search to a tile.

Chart Properties is the chart category filter you selected for the search.

When you save an advanced search

Type is the type of item you searched for.

Keywords are the search criteria you entered.

Allow others to view shares your saved search. Sharing is configured by your administrator.

Pin to Home pins your saved search to a tile.

Retrieve a saved search

In the **Saved** search list, searches from the search box are labeled as **Keyword Search**. Searches from advanced search are labeled as **Advanced Search**. Other searches shared with you may be included in this list.

You can access a saved search multiple ways:

- Click the **SAVED SEARCHES** tile on the home page to open the **Saved** search list.

- Click the **Saved** page on the **Search** header to open the **Saved** search list.

When viewing the **Saved** search list, you can:

- Refine the list using **Filters** ▽.

- Click a search in the list to display its information.

  - **Overview** displays key information about the selected search, including its search criteria and owner.

    Click on the values in **Criteria**, **Filters**, or **Chart By** to access **Rules**.

    The results are displayed in the **CONTENTS** section.

    In the **CONTENTS** section, you can **Export to Excel**.

  - **Rules** displays the current search criteria and the returned results. You can set or update the search criteria rules if you have permission.

- Run a search by clicking **Open**.

When you run a **Keyword Search**, the **Filters** panel includes an **Updated Results** filter. You can choose objects that are **New**, **Modified**, or **Unchanged** since the last time you ran the search.

Work with your saved search

Once you have saved your search, you can modify it in several ways by selecting **Saved** from the header area.

> Note:
>
> You cannot modify saved searches that were not saved by you.

Edit your saved search

You can change a search name and allow others to view a search. Select the saved search and click **Edit** > **Summary** in the primary toolbar. Make your changes and click **Edit** > **Save Edits**.

Pin or unpin your saved search

To pin your saved search, select the saved search and click **View** > **Pin Search** in the primary toolbar.

Unpin your saved search by using one of the following methods:

- Select the saved search and click **View** > **Unpin Search** in the primary toolbar.

- From the home page, right-click the search tile to display controls on the corners. Click **Unpin**.

Delete your saved search

You can delete a saved search that you created. Select the saved search and click **Edit** > **Delete** in the primary toolbar.

Export search results

From the **Table** or **Table with Summary** view of your search results, you can export rows to Microsoft Excel or Microsoft Word.

- **As Shown** exports the results to Microsoft Excel. The displayed columns and sort order are applied to the output.

  The maximum number of rows for exporting is configured for your site.

- **Template** exports the results to Microsoft Excel or Microsoft Word, and your selected view and template are applied to the output.

Activate **Selection Mode** on the results panel toolbar. You can also **Select All** or **Clear Selections** using .

1. When your items are selected, choose **Share** > **Export** from the primary toolbar.

2. In the **Export** panel, choose how to export your search results.

As Shown	**All Results** exports the entire list up to the maximum number, regardless of what is selected. Choosing all results may include results not yet displayed. **Selected Results** exports selected rows.
Template	Both **Excel** and **Word** export the selected results using a specified view and template.

3. Click **Export** and provide a location to save the file.

Organize searches with active folders

View active folders

Active folders save predefined search criteria and return the latest available matching results. You can create search criteria for active folders that generate results automatically. Then you can navigate, organize, and share these active folders.

You can create a hierarchy of related active folders to group similar searches together. A new active folder adopts the criteria of its parent by default. You can create a parent active folder with common search criteria and then refine this criteria for a set of child active folders.

Find your active folders

Open **Active Folders** from the global navigation toolbar or from the **MY ACTIVE FOLDERS** tile on the home page. By default, **My Active Folders** contains the **Recently Modified** active folder with sample searches in nested folders:

By Me	Returns your recently modified data. The criteria and the results are displayed in the **Overview** tab in the right pane.
By My Group	Returns your group's recently modified data. The criteria and the results are displayed in the **Overview** tab in the right pane.

If you are listed as the **Owner** of the folder, you can update the **Name** and **Description** of the active folder by clicking **Edit** on the primary toolbar.

Review and customize your active folders

On the **Navigate** tab, select the **Tree with Summary** or **Tree** view. In the **Tree with Summary** view, the right pane displays information about a selected folder.

Overview	Displays key information about the selected active folder, including its search criteria and owner. The results are displayed in the **CONTENTS** section. In the **CONTENTS** section, you can **Export To Excel**.
Rules	Displays the current search criteria and the returned results for the folder. You can set or update the search criteria rules if you have permission.
Shared With	Set or update with whom you want to **share an active folder**, if you have permission. You can filter the list, select multiple entries to add to the list, or remove entries from the list.

To further customize your active folders, you can:

- **Create an active folder**. Add and define an active folder using **Add Active Folder**.

  > Note:
  >
  > Active folders do not support **Import Changes**. You can use a different method to **import an active folder**.

- **Update the rules of an active folder**.

- **Share an active folder**.

Create an active folder

You can create an active folder several ways. The active folder is created as a child of your current folder selection. By default, the active folder inherits the search criteria of its parent and the parent folder no longer retains this search criteria. You can then further refine the active folder's search criteria and add other child folders.

Add an active folder from the My Active Folders page

1. Click **Add Active Folder** on the panel toolbar.

2. Enter a name for the active folder in the **Name** field.

3. Optionally, you can enter a description for the active folder in the **Description** field.

4. Click **Add**.

   If the new folder is a child, it inherits the parent folder settings.

Add an active folder from the Home folders page

1. Click **Add** on the panel toolbar.

2. Under **Type**, select **Active Folder**.

3. Enter a name for the active folder in the **Name** field.

4. Optionally, you can enter a description for the active folder in the **Description** field.

5. Click **Add**.

   All active folders created from the **Home** folders page are shared with the **My Active Folders** page.

Create an active folder template

1. On the **My Active Folders** page, select an existing active folder.

2. In the primary toolbar, click **Share** > **Export Active Folder as Template**.

   This creates an XML file containing the folder's hierarchy, rules, and sharing information.

Import an active folder

1. On the **My Active Folders** page, click **New** > **Import Active Folder** from the primary toolbar.

2. Select an active folder XML file with a folder definition, including hierarchy, rules, and sharing information.

3. Click **Import**.

   You can also import an active folder that is not shared with you. If you run the search, user permissions are applied to the results and may not return what you expect.

   If you import an active folder more than once but to a different location, the new folder is a copy of the previously imported folder. They are synchronized in the background, and changes made to one folder are made to the other.

Update the rules of an active folder

When a new active folder is created, it inherits the search rules from the parent folder. In the **Rules** tab, refine the rule using the work area toolbar for an active folder. A change affects only the selected active folder. The action has no effect on any other folder in the hierarchy.

Procedure

1. Click **Start Edit** to refine an existing rule or replace it.

2. Select **Keyword**, **Advanced**, or **Saved** search.

   The results are updated in the panel on the right as you make changes.

   For advanced searches, the results are updated when you click **Search** at the bottom of the panel.

3. Click **Save Edits** to save your changes.

Share an active folder

If you have permission, you can share a selected folder from the **Tree with Summary** view. You may share both **Organization** and **Projects** choices for a single active folder. Sharing permissions determine whether someone can make a change to a shared active folder. The owner is always displayed for a shared folder. If the owner is a group, you must be a member of the group to make a change.

Procedure

1. Click the **Shared With** tab and choose **Organization** or **Projects**.

2. Enter a search term and click to see a list of matches.

   If you choose a category, nested children are included.

3. Click **Add** ⇨ and **Remove** ⇦ to edit the items in the **SHARED WITH** list.

Your selections are saved automatically.

4. Searching for classified data

What is classification

New product development and product improvement commonly involve the reuse of existing elements. This increases efficiency and savings. Digital libraries contain massive quantities of objects that are unrelated to each other except for how they are used or reused. *Classifying* these objects using descriptive attributes that you can search ensures they can be easily found. Active Workspace contains classification hierarchies, classes, and attributes organized into class definitions so that users can quickly find objects for reuse.

For example, your company decides on a set of standardized processes for manufacturing your new product. When designers plan new processes, they can search the classes in the classification hierarchy to find a fitting standardized process to use as a basis for the new one. The designers do not have to start from scratch.

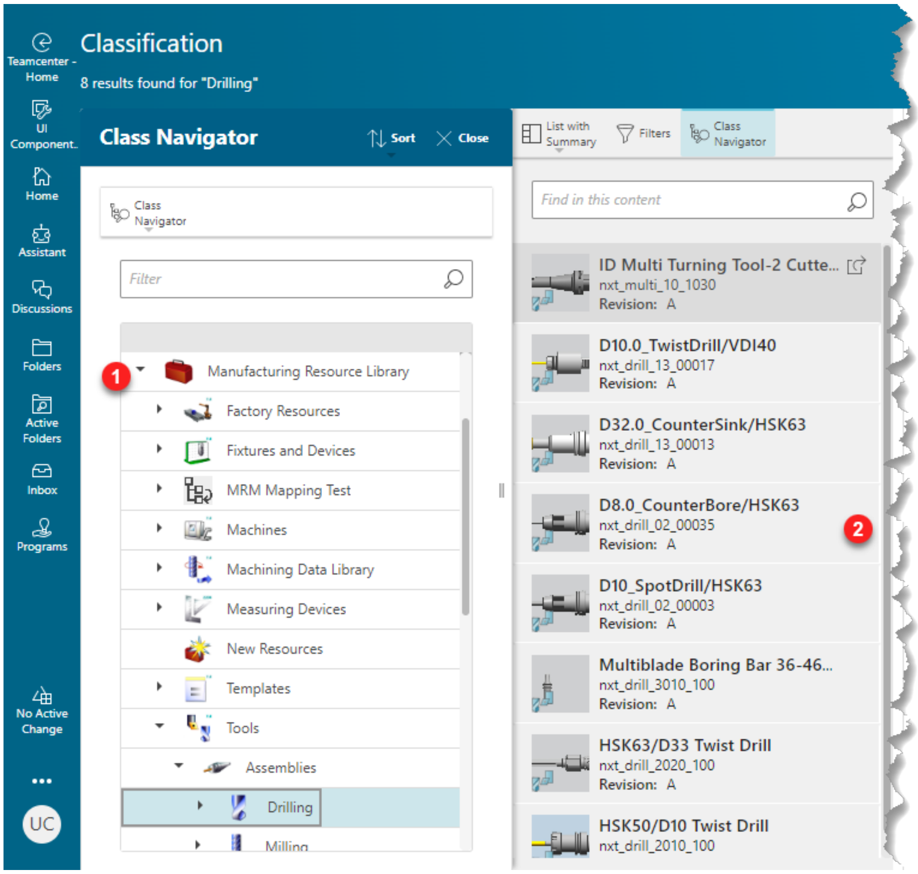
In Active Workspace, you can search for classified objects, or classify a new object into predefined classes, assigning values to attributes that uniquely describe your object.

Exploring the classification user interface

Active Workspace provides a rich graphical interface for working with classified object. Main components are the **Class Navigator**, the **Classification** tab, and the **Classify** panel.

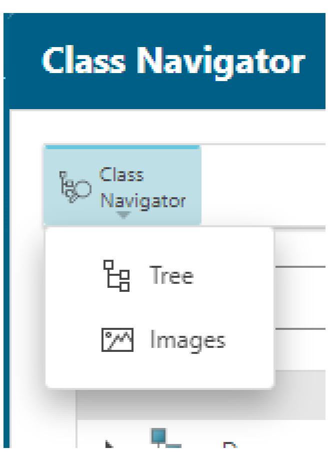
The classification location

The classification location is the starting point when searching for classified objects. The Class Navigator helps you find the class you need.

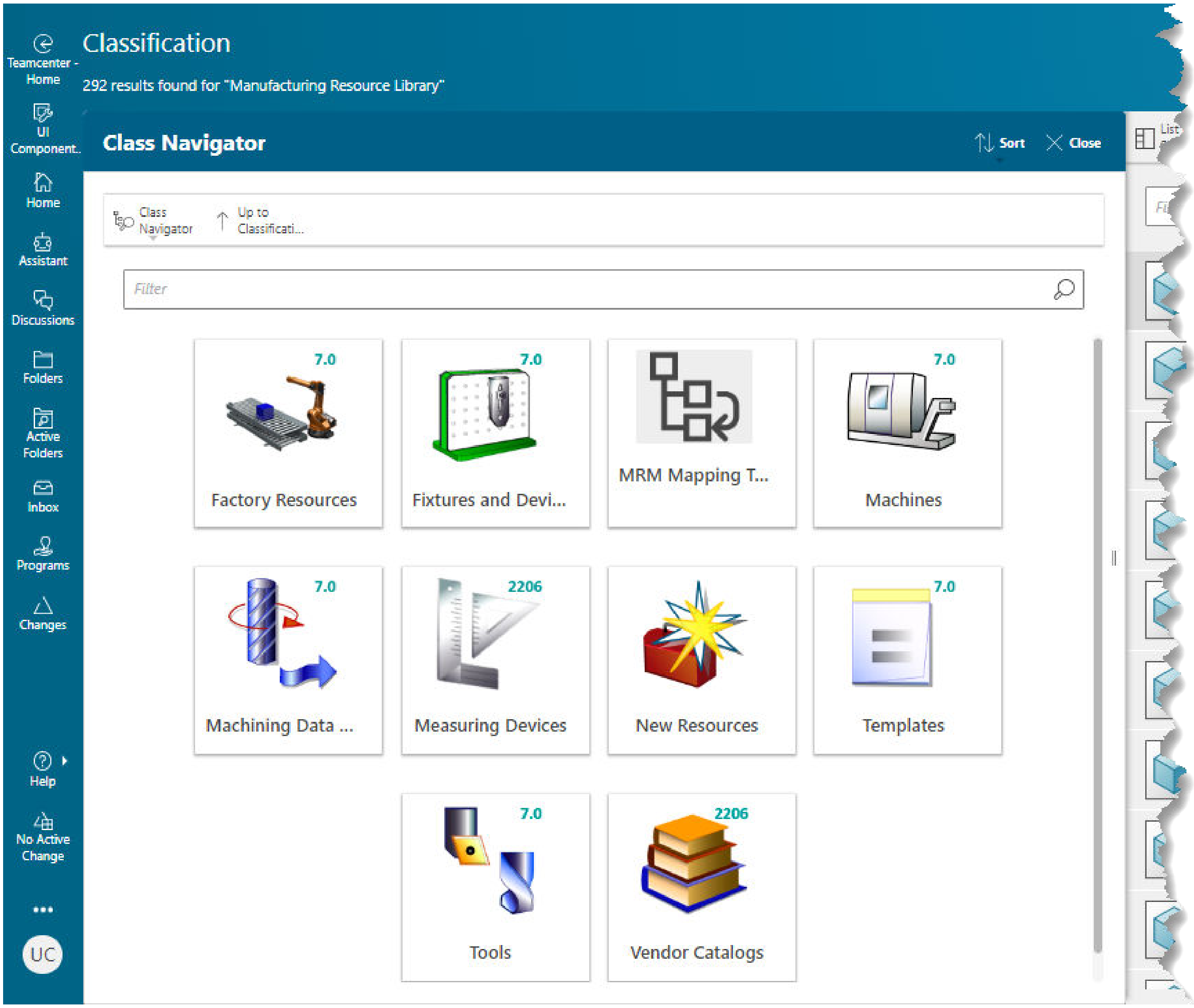


1	**Class Navigator**	Navigate the classification hierarchy to find the desired class and then optionally, use filters to narrow your search.
2	Search results	Select from a list of search results.

Alternatively, you can switch from tree viewing to navigating by image.

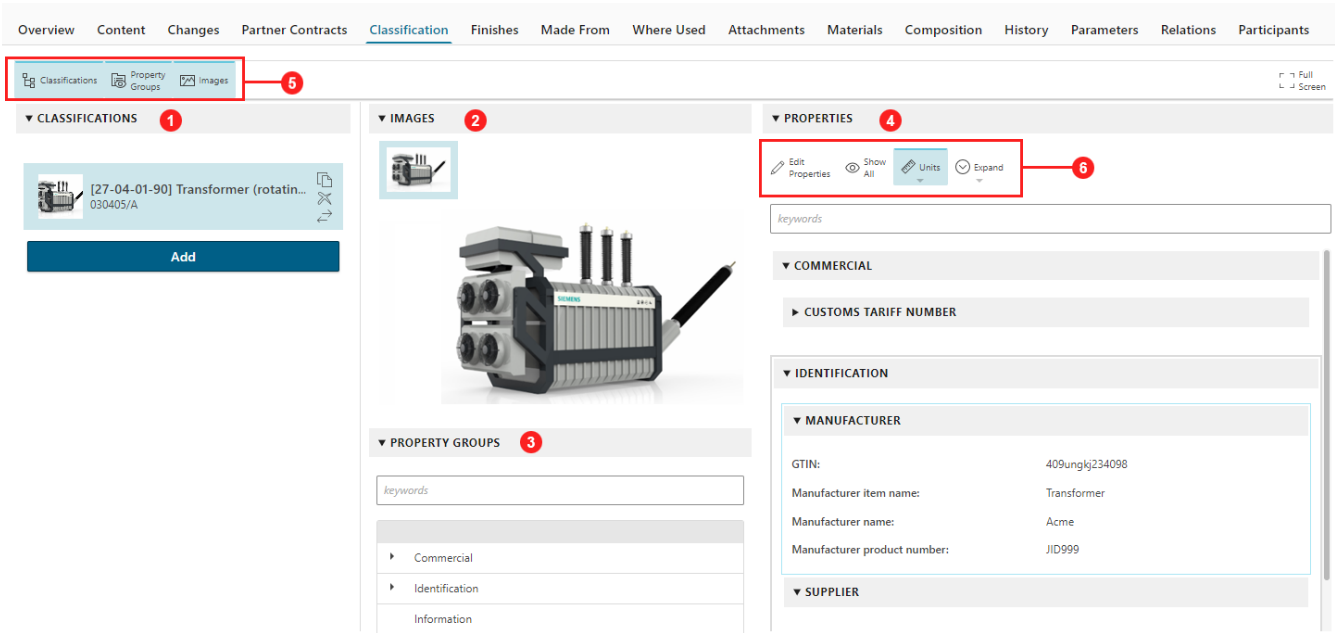


Each node in the hierarchy is then represented by an image.



The Classification tab

The **Classification** tab provides a large area to view, edit, or delete classification data.



Using the full page display improves the process of working with classification data by also allowing you to search and browse the classification hierarchy during a classify operation. For more space when working with the classification properties, click **Full Screen**.

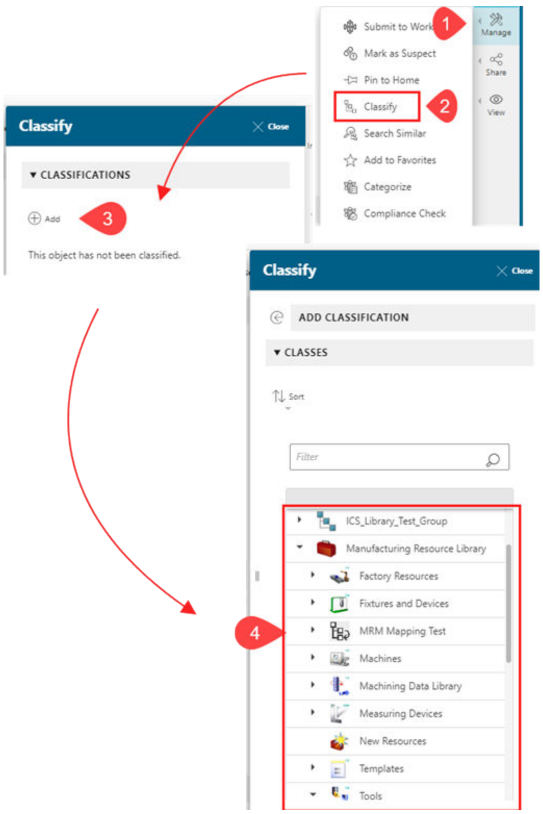
1	**CLASSIFICATIONS**	Lists the classifications for a selected object.
2	**IMAGES**	Displays any images associated with the classified object.
3	**PROPERTY GROUPS**	Displays all property groups 5 used to classify the object. Navigate the property groups by expanding or selecting each of them.
4	**PROPERTIES**	Displays the classification properties of the selected object.
5	Tab-specific buttons	Hide areas of the user interface to provide more viewing space for other areas.
6	Property-specific buttons	Edit property values. Show or hide the display of empty properties. This helps keep the focus on the properties containing a value. Specify whether you enter metric or non-metric values. The values are always stored in the base unit

of the class regardless of which unit system you use to enter them.

Expand or collapse all the property groups.

The Classify panel

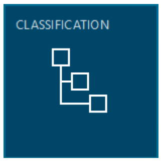
The **Classify** panel provides the option to classify without opening the **Classification** tab.



Find a classified object by browsing the classification hierarchy

The classification hierarchy is displayed as a tree structure of nested classes that allows you to intuitively navigate down the hierarchy in search of a classified object. Selecting any class provides you with filters for all the attributes contained in the selected class. You can use these filters to narrow the search results.

1. On the Home page, click the **CLASSIFICATION** tile.

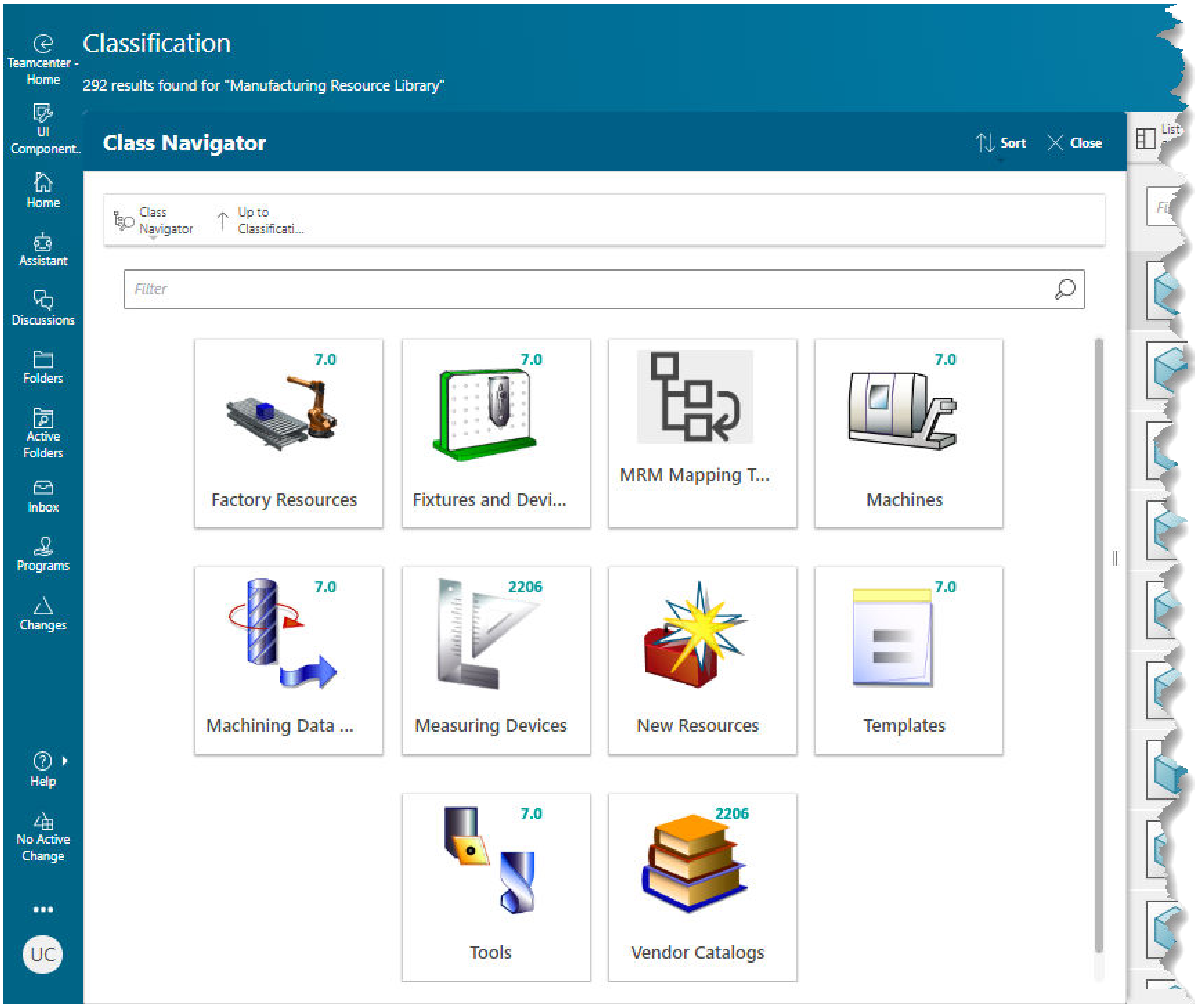


The classification location is displayed. The classification hierarchy is displayed in the **Class Navigator** panel.

2. Do one of the following:

   - Navigate down the hierarchy and click arrows in the **Class Navigator** pane to open the hierarchy or click the class to perform an automatic search in the class.

   - Click **Class Navigator** and select **Images** to navigate the hierarchy by class image. It is helpful to make the **Class Navigator** pane wider when navigating by image to see as many images as possible simultaneously.



3. Click **Filters** to narrow your search.

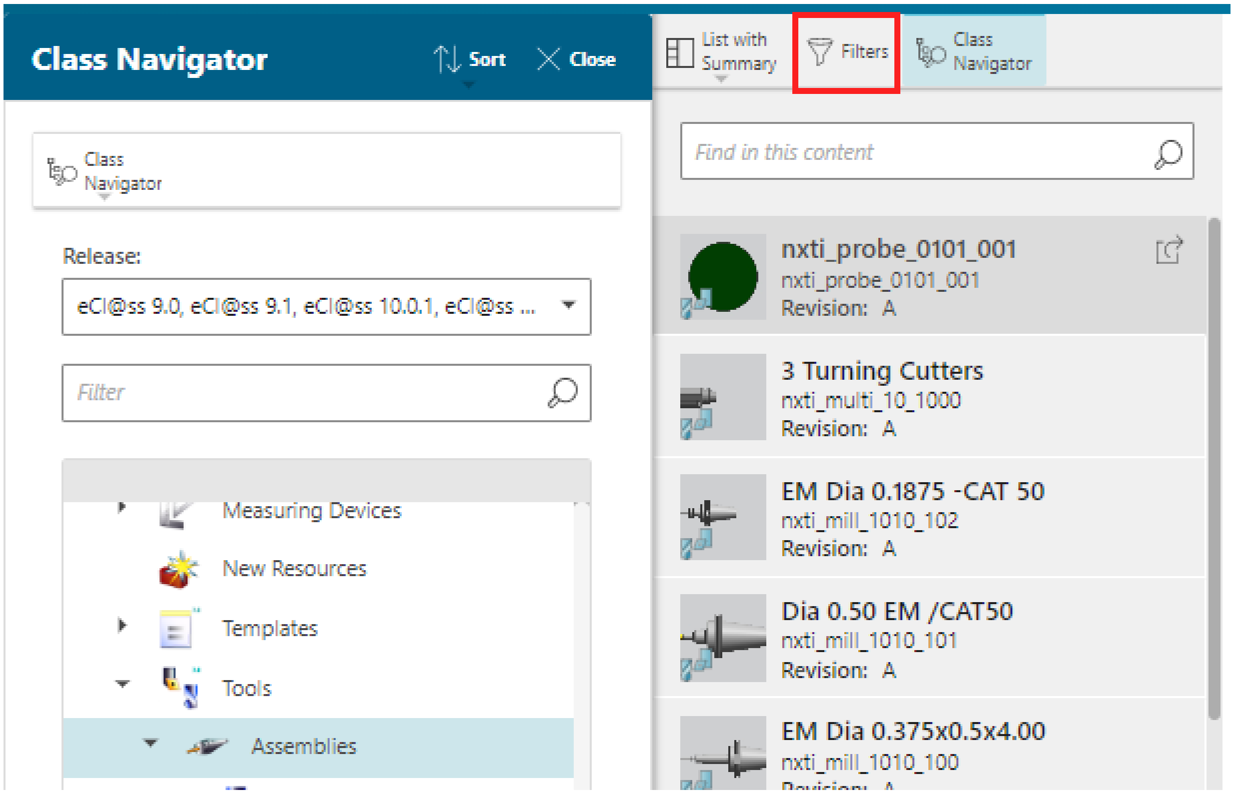
4. Open the desired result by clicking **Open** and click the **Classification** tab.

Find an object by searching for a specific property value

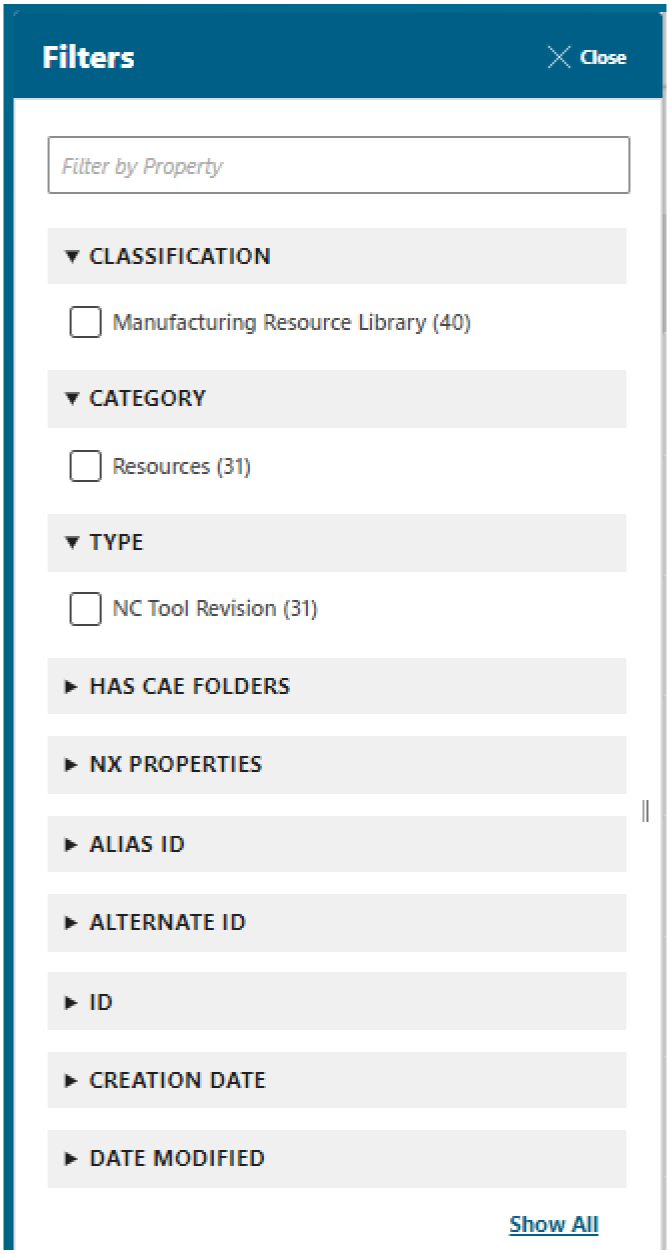
You can find classification objects by searching for the value of a specific property. Filtering is available to aid the search.

1. In the classification location, navigate to the desired class in the classification hierarchy.

2. Click **Filters**.



The properties of the selected class are displayed in the **Filters** pane.



3. Do one of the following:

   - Search for the desired filter by typing the name in the **Filter by Property** box.

   - Select the desired value within any of the filters.

The objects that are in the selected class that contain the specified property values are displayed in the search results.

Tip:

The behavior of the filters depends on your search settings. Find these in the **Advanced Search**.

Find classification objects using the global search

The global search helps you find any object in the database.

Use the following syntax when searching for classified objects in the global search:

To	Use this syntax	Examples
Search on the classification class name	**"Classification class name":***desired-class-name*	**"Classification class name":drill** **"Classification class name":"spot drill"**
Search on classification class ID	**"Classification class id":***desired-class-ID*	**"Classification class id":TA_MILL_10_20**
Search on a classification property	*property-name***:***property-value-or-keyword*	**Company:siemens** **"Resource Description 1":"angle base plate"** **"Step count":4**
Search for a numeric range of a property	*property-name***:[***start-range* **TO** *end-range***]**	**"Step count":[0 TO 5]**

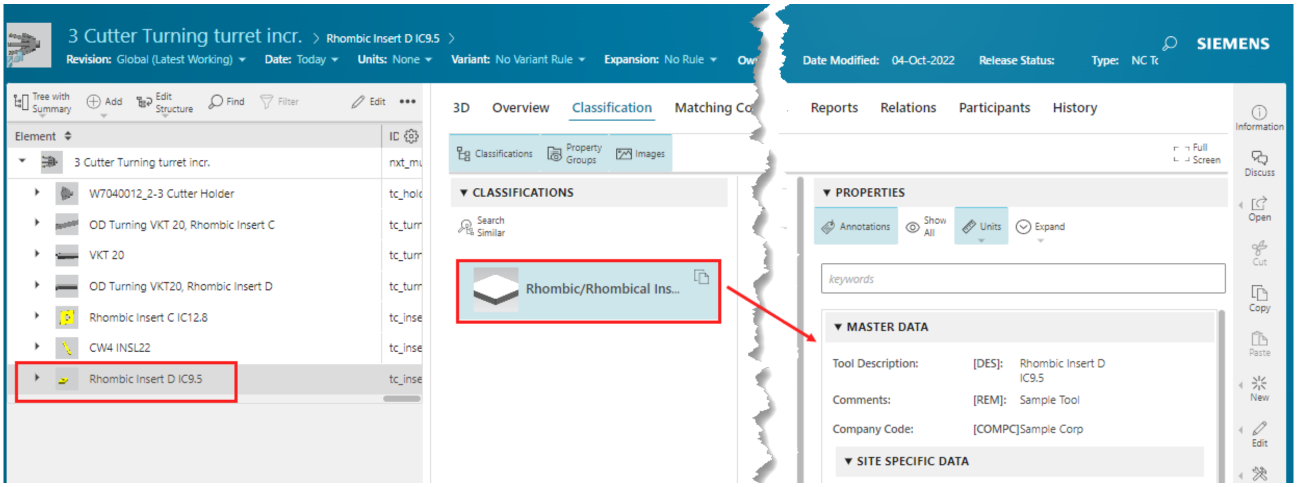
Note the following:

- If any part of the search syntax consists of more than one word, it must be enclosed in quotation marks.
- The global search is not case sensitive.
- Classification class IDs are not visible to a business user in Active Workspace. However, many business users are familiar with their hierarchies and know the class IDs. If this is so, then you can use the global search to search on this class ID.

Understanding the classification of assemblies

When you classify an assembly, you are actually classifying the underlying classifiable object (for example, the item revision). The underlying classifiable object of each line of an assembly is classified independently.

This means that each object in an assembly can belong to a different classification class (or none at all). When you view an assembly, the **Classification** tab displays the classification properties of the classifiable object that the selected element in the left panel points to. If no element is selected, the classification details for the assembly's classifiable object are displayed.



Search for classes using classification criteria

In the classification location, you can navigate through the class hierarchy manually.

If you already know the name or ID of the class in which you want to search, you can search using the following syntax:

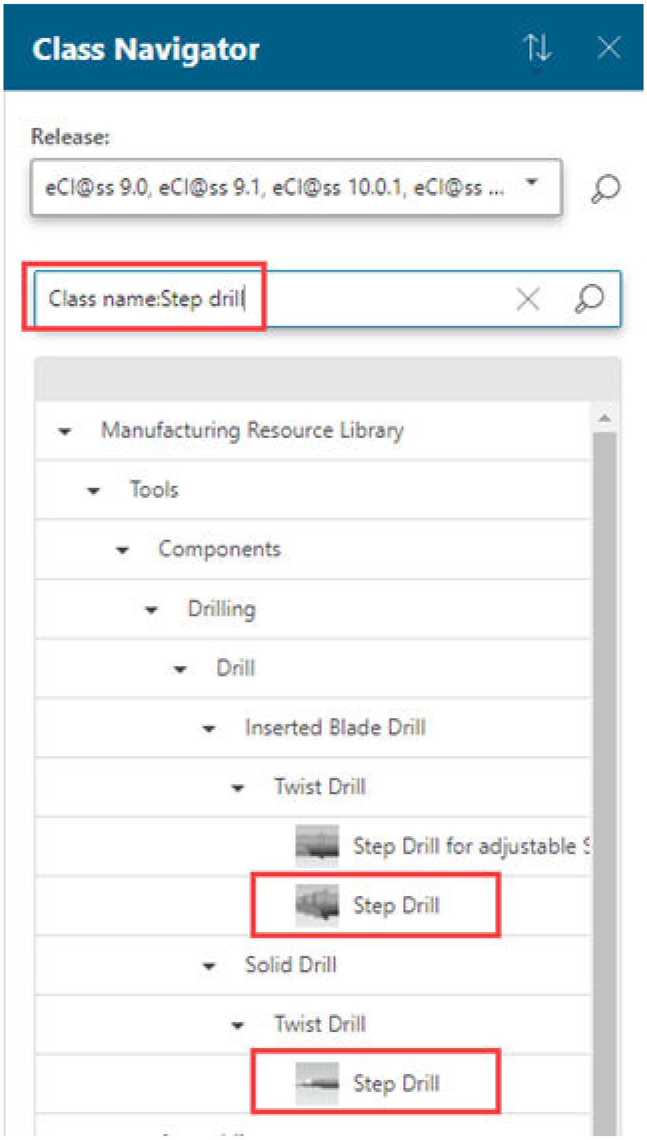
Class name:

Class id:

Example:

Class name:Step drill

Do not enter a space between the colon character and the parameter you search for.

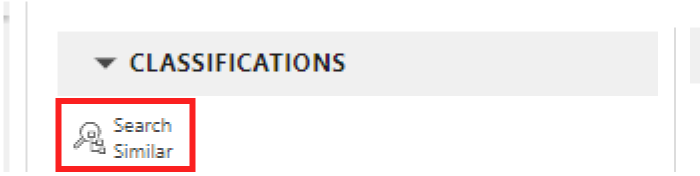


Search for an object based on the properties of another object (search similar)

Sometimes, you want to find an object with similar properties to one you know or to one you currently have open. This is possible with the **Search Similar** command.

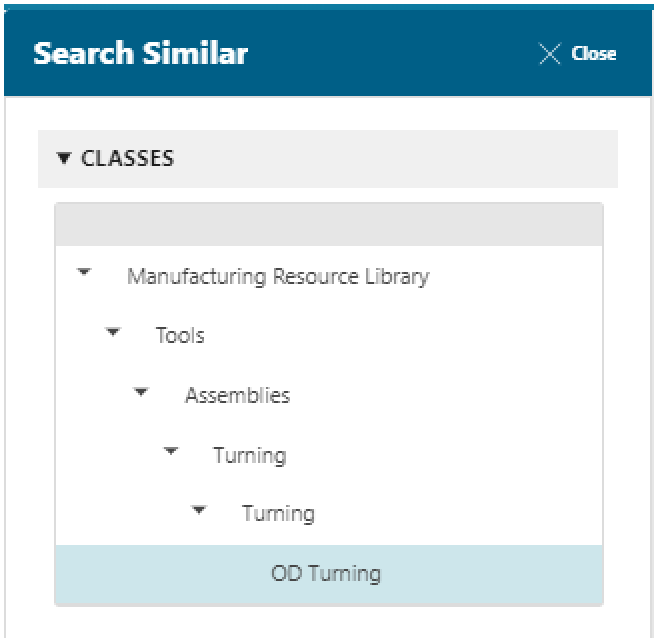
1. Open an object in the **Classification** tab.

2. Select **Search Similar** in the **CLASSIFICATIONS** pane.



You may have to allow the pop-up blocker permission to open the web page.

The **Search Similar** pane opens displaying the classification hierarchy of the object.



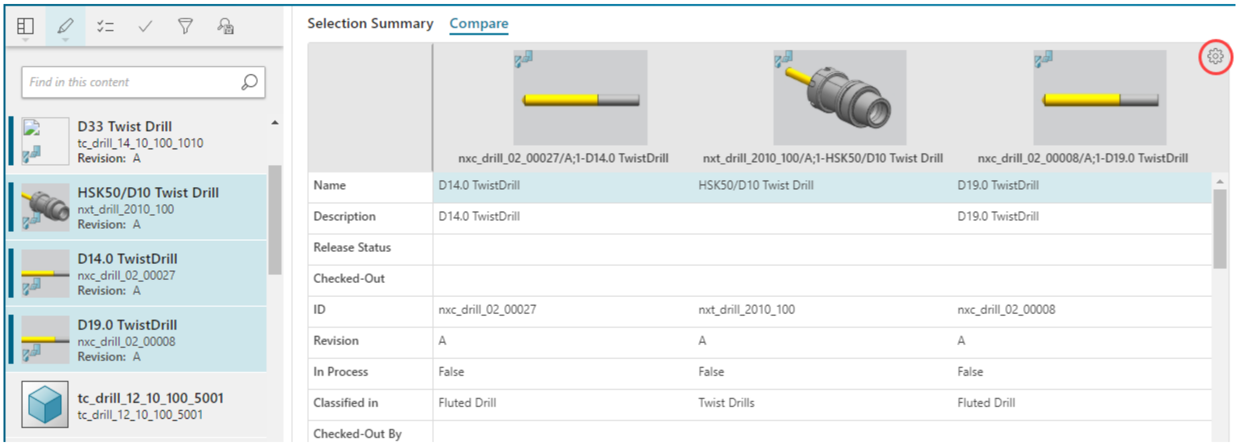
3. To search in the same class as the currently opened object, click **Search**. Alternatively, you can widen your search by clicking any of the parent classes displayed in the hierarchy and then clicking **Search**.

   A new browser window is displayed containing the **Filters** pane with the facets of the chosen class.

4. Modify these filters to find the appropriate object.

Include classification properties when you compare search results

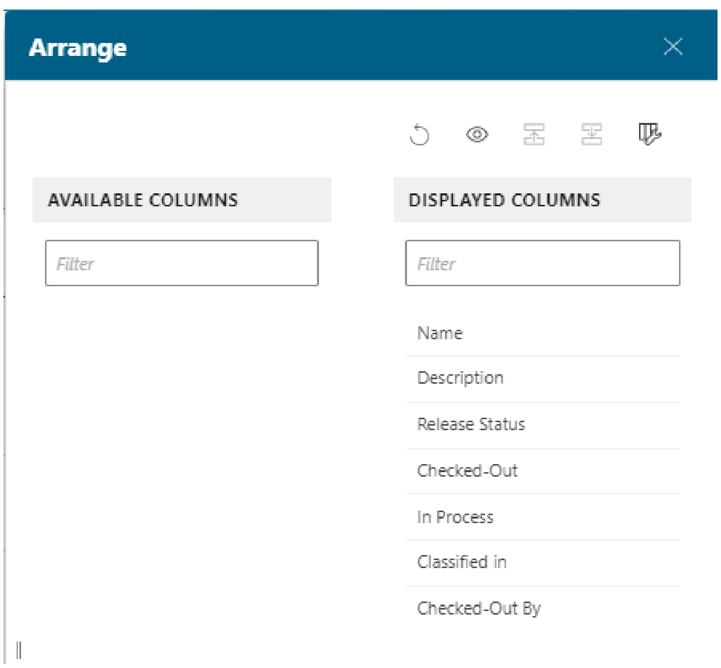
When you select multiple search results, you can compare their properties in a table. Classification properties are included in this table.



Note:

The comparison of classification properties is available only in the **Results** panel of the search. Only classifiable objects are displayed in the comparison table.

Open the **Arrange** panel by clicking ⚙.



Note:

When an object is classified in multiple classes, the most recent (by time) classification properties are displayed in the **Compare** table. Older classification properties are not shown but can be seen in the **Selection summary** view.

5. Working with data

Creating and revising data

Object types in Active Workspace

Object is a generic term used to describe any part, design, document or other entity that may be stored in your system.

As you work in Active Workspace, you see the thumbnail images for different object types, for example:

Image	Object type
	Folder
	Item Revision
	Document

If you don't recognize an icon, you can open the object and look at the **Type** in the **PROPERTIES** section.

Note:

To mark an object as a favorite, display the object and click **Manage** > **Add To Favorites**. This places a link to the object in the **FAVORITES** tile on the home page.

How items and item revisions work with Favorites and the home page

You will see different behavior for **Favorites** and **Pin to Home** based on the current revision rule of the user session and whether you add/pin an item or an item revision.

Favorites with items and item revisions

What you see when you favorite an item or item revision depends on three rules.

If:	Then:
1. You add an item to **Favorites**.	**Favorites** will display the *configured* item revision.
2. You add a *configured* item revision to **Favorites**.	**Favorites** will display the *configured* item revision.
3. You add a *superseded* item revision to **Favorites**.	**Favorites** will display the *superseded* item revision.

Let's look at a few examples to see how this works with the following scenario.

Item	026355	
Item revision	026355 revision A	(superseded revision)
Item revision	026355 revision B	(superseded revision)
Item revision	026355 revision C	(configured revision)

Revision rule = Latest Working

	If you add this to Favorites.	Then this is what you see in Favorites.
Example 1	Item- 026355	Item revision- 026355 revision C (the *configured* revision)
Example 2	Item revision- 026355 revision C (the *configured* revision)	Item revision- 026355 revision C (the *configured* revision)
Example 3	Item revision- 026355 revision C (the *configured* revision) and then make a revision D.	Item revision- 026355 revision D (the new *configured* revision)
Example 4	Item revision- 026355 revision A (a *superseded* revision)	Item revision- 026355 revision A (a *superseded* revision)
Example 5	Item revision- 026355 revision B (a *superseded* revision)	Item revision- 026355 revision B (a *superseded* revision)

Remove from Favorites

You open either the item or the *configured* item revision to remove the *configured* item revision from **Favorites**.

You open the specific *superseded* item revision to remove it from **Favorites**.

Pin to Home with items and item revisions

Pin to Home uses the same rules as **Add to Favorites**.

Let's look at a few examples to see how **Pin to Home** works with the following scenario.

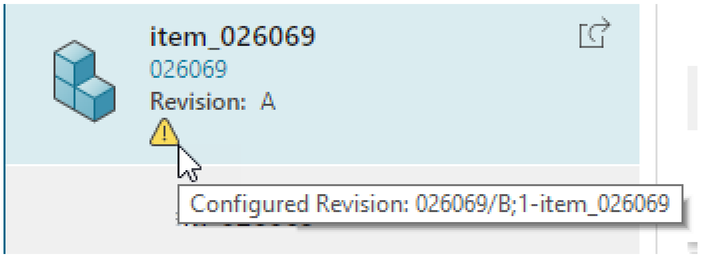
Item	026355	
Item revision	026355 revision A	(superseded revision)
Item revision	026355 revision B	(superseded revision)
Item revision	026355 revision C	(configured revision)

Revision rule = Latest Working

	If you pin to home	Then this is what you see on the home page.
Example 1	Item- 026355	Item revision- 026355 revision C (the *configured* revision)
Example 2	Item revision- 026355 revision C (the *configured* revision)	Item revision- 026355 revision C (the *configured* revision)
Example 3	Item revision- 026355 revision C (the *configured* revision) and then make a revision D.	Item revision- 026355 revision D (the new *configured* revision)
Example 4	Item revision- 026355 revision A (a *superseded* revision)	Item revision- 026355 revision A (a *superseded* revision)
Example 5	Item revision- 026355 revision B (a *superseded* revision)	Item revision- 026355 revision B (a *superseded* revision)

Superseded icon

Item revisions that have been superseded and are no longer the configured item revision are labeled with a visual indicator. Hover on the visual indicator and you see information about the configured revision.



How dynamic item revisions work in folders, item relations, and paste actions

Active Workspace can be configured by your administrator to only show the most recent item revisions in folders and tables, such as in the attachments for an object. If this is enabled, and you have your revision display rule set to **Latest**, you only see the most recent item revisions, even if the revision you originally pasted into a folder or related to an object has changed since you added it.

Note:

Revisions are displayed based on your revision display rule. Because of this, different revisions may display for your selection based on which rule you choose.

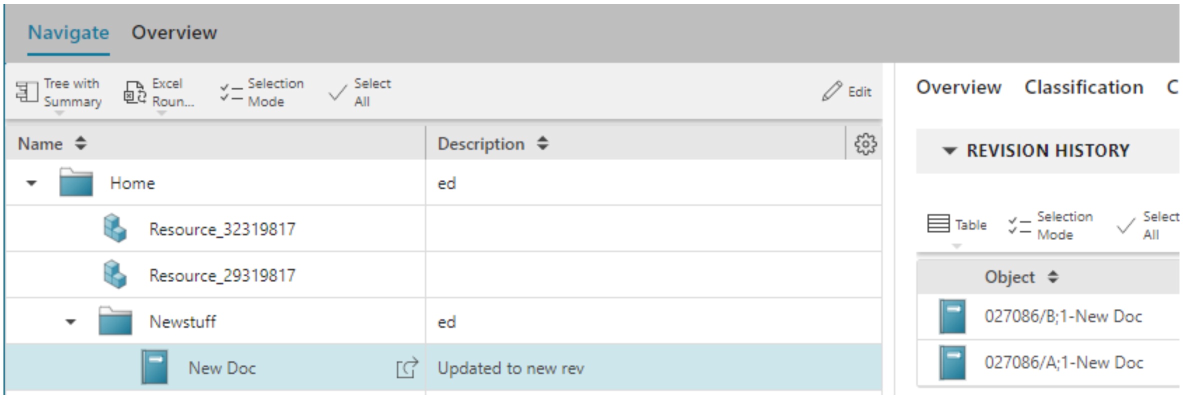
Keep the following in mind with how revisions display in Active Workspace when dynamic revisions are enabled.

- If you relate a non-configured or out-of-date revision, then this revision is related and the displayed revision does not change.
- If you relate a configured revision, then the item is related and the displayed revision automatically changes to your currently selected configured revision.

Folders

Items in your folders that you or other users revise are automatically updated to the most recent revision. This allows you to always see the most current revision of your items when browsing through your folders.

For example, you create a new document in your home folder that is revision A. Later, you revise this document and it is now revision B. The next time you browse your home folder, the new revision B displays. You can then select the item and view previous revisions on the **History** tab if necessary.



Note:

Automatic updating of item revisions in folders is on by default. Your can override the preference value of **AWC_display_configured_revs_for_pwa** and set it to **False** to prevent the items from automatically updating to the new revision. Any non-configured or out-of-date revisions pasted into your folders with this preference set to false are displayed with a warning icon letting you know the revision is not current.

Relating item revisions through search and copy/paste

Note:

Your administrator must configure which tables always show the most recent revision.

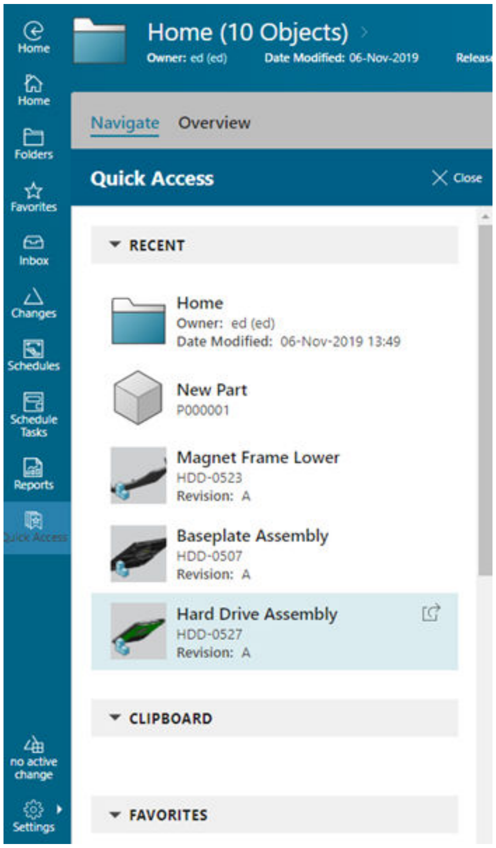
When relating an item revision to an object, such as adding a document (revision B), you can search for the item revision and then add it as an attachment to the object. If the related item is later updated to a new revision (revision C), the attached item revision automatically gets updated to show only the newest revision (revision C). The next time you view the attachments for the object, only the new item revision is displayed.

If you paste an out of date revision that was copied to your **Clipboard**, such as a document revision (revision A) you copied earlier that was later updated (revision B), Active Workspace automatically updates the copied document to the newest revision when you paste it.

Quick access to your content

Use **Quick Access** in the **global navigation** to quickly view objects you recently worked with, data saved to the clipboard, and data tagged as favorites from any page.

- Easily view the content by expanding and collapsing the three sections of data.
- Drag items from **Quick Access** to places like your home folder or to a product structure.
- Select items in the panel to work with.



Open a part, document, or other object

To view or otherwise work with a data object in Active Workspace you need to *open* it. Once opened, you can view detailed information such as properties, access attachments, and perform various operations.

1. In Active Workspace, select a part, document, or other object you want to open.

2. Click **Open** on the selection tile.

Note:

You can also make a selection and click **Open** > **Open in New Window** or **Open in New Tab** from the primary toolbar.

Based on your browser settings, an attached file attached may open immediately, or you may be prompted to download or save the file.

Note:

If an administrator has enabled the Data Share Manager, a dialog box may appear asking you to install the Data Share Manager on your client to manage file uploads and downloads.

Create / Add a part, document, or other object

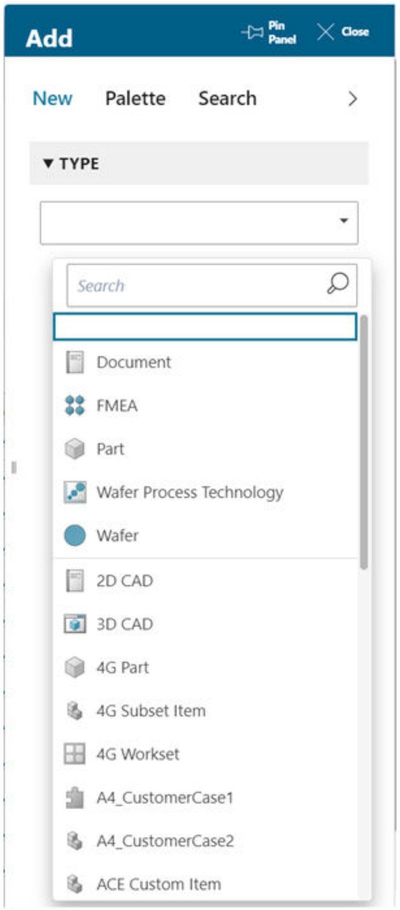
If you have the requisite user permissions you can create new data objects in Active Workspace.

1. Display the folder where you want to create a part, document, or other object.

   For example, open your **Home** folder.

2. Click **New** > **Add** .

   The **Add** panel opens.



3. (Optional) To keep the **Add** panel open so that you can continue to add objects without opening the panel each time, click **Pin Panel** to pin the panel to your workspace.

> Note:
>
> Click **Unpin Panel** to unpin the panel from your workspace.

4. Select the type of object you want to create from the **Type** list. The most recently used types are displayed at the top of the list.

   You can also search for a type using the **Search** box.

   The types that display are configured by the system administrator.

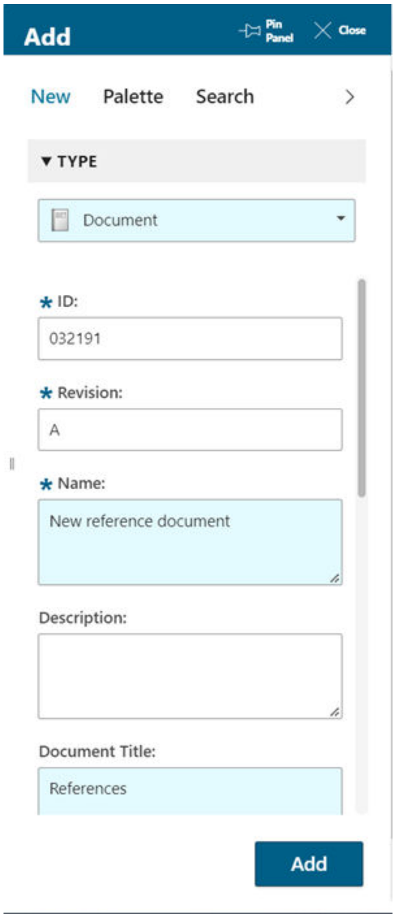
   If you are creating a new attachment, you can upload an existing file as an attachment to the new object. In the **FILE ATTACHMENTS** section of the **Add** panel, click **Choose File** and select the desired file. Active Workspace automatically sets the type to the file type that matches the file extension. If there is more than one choice, Active Workspace selects the default, but you can change it.

Note:

If an administrator has enabled the Data Share Manager, a dialog box may appear asking you to install the Data Share Manager on your client to manage file uploads and downloads.

5. Enter properties.

   The properties vary depending on the type being created. These properties are configured by style sheets, which are maintained by the administrator.



   Add is highlighted when all required fields are entered.

6. Click **Add**.

   The newly created object is placed at the top of the current list, list with summary, or table display for easy access. If you create a single new object, the object is automatically selected. The object is placed in the expected sort order once you navigate away from this location or apply filters.

> Note:
>
> If you pinned the panel to your workspace, the **Add** panel remains open, the **Revision** and **Name** values carry forward, and the **ID** value increments.

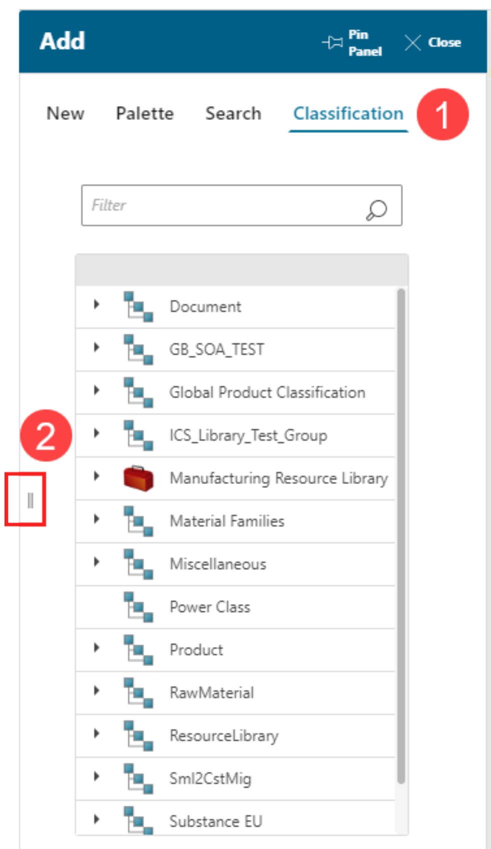
Add a classified object to a selected folder

The **Classification** tab allows you to search for classified objects. If you want to classify objects, open the **Classification** location.

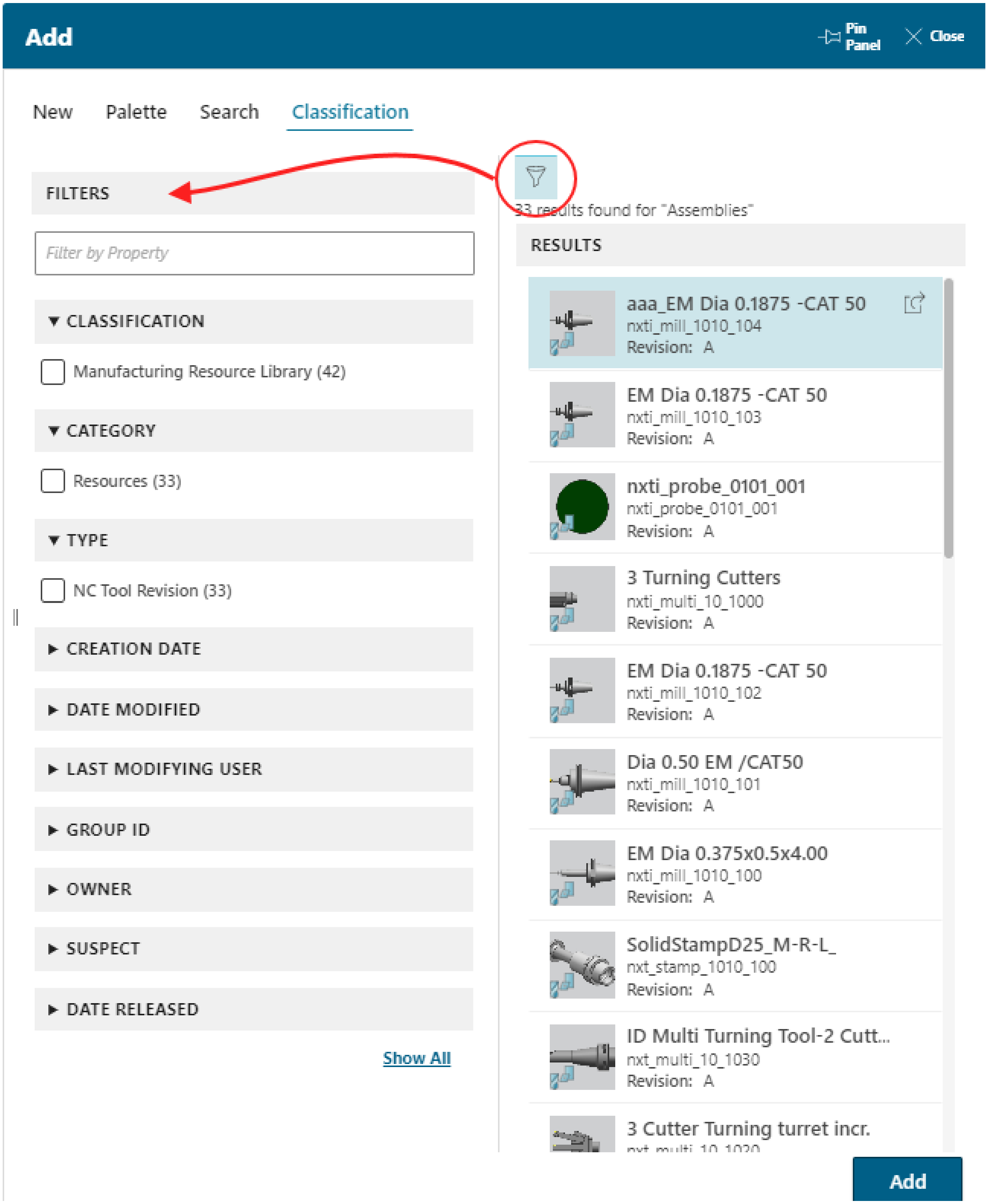
1. Select the folder to which you want to add a classified object.

2. Click **New** > **Add** .

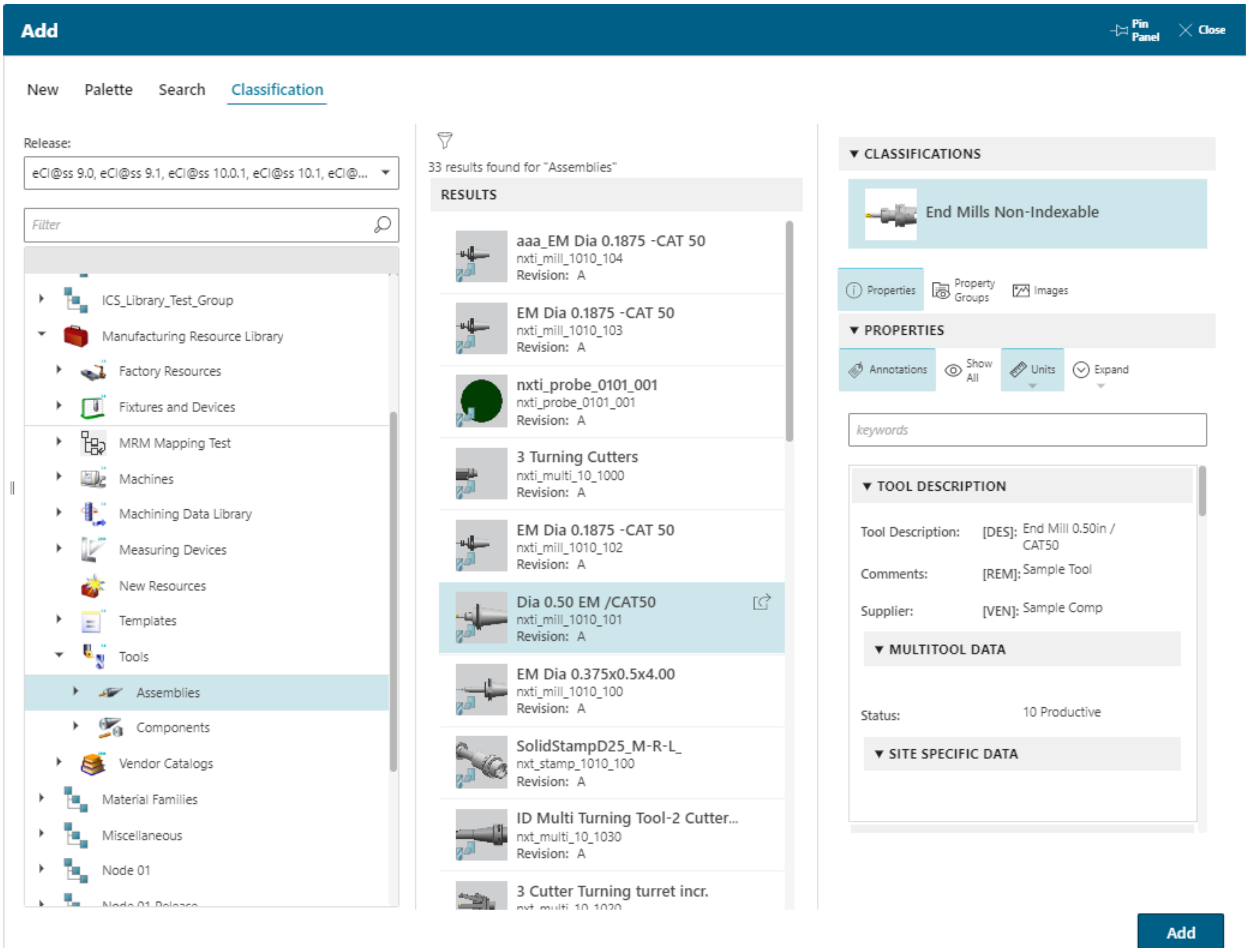
3. Click the **Classification** tab 1.



4. Select a class and drag the pane 2 to twice its width to display search results or to select the **Filter** button to further refine the results.



5. Drag the pane to three times its width to view the classification properties of the selected object.



6. Click **Add** to add the classified object to the folder.

Change ownership

Data objects in Active Workspace are assigned an *owner*. By default, the user who creates an object is the owner, but that can be changed.

> Note:
>
> You can only change the owner of an object if you have appropriate permissions (including the **Write** permission).

1. Select one or more objects.

2. Click **Manage** > **Change Owner** .

3. In the **Change Owner** pane, select the new owner.

If needed, use **Filter** to search for a new owner.

4. Click **Change**.

   You can see the change of ownership in the object **Properties**.

> Note:
>
> You cannot change the owner of the following object types:
>
> - **Answer**
> - **Att0MeasurableAttributeInt**
> - **Comment**
> - **CostValue**
> - **Fixed Cost**
> - **Helpful**
> - **Measurable Attribute** (Abstract)
> - **Measurable Attribute Boolean**
> - **Measurable Attribute Double**
> - **Measurable Attribute String**
> - **Proxy Task**
> - **Qualification**
> - **Question**
> - **RateModifier**
> - **Rating**
> - **Required Qualification**
> - **ResourceAssignment**
> - **Schedule**
> - **Schedule Audit**
> - **Schedule Deliverable**
> - **Schedule Member**
> - **Schedule Task Deliverable**
> - **ScheduleTask**
> - **Task**
> - **TaskDependency**

Check out and check in

1. Select a part, document, or other object you want to check out. For example, select something from the list of search results.

2. From the primary toolbar, click **Edit** > **Checkout** .

   The selection displays a **Checked-Out** property set to **Y**.

To check a selection back in, click **Edit** > **Checkin** .

To cancel the checkout, click **Edit** > **Cancel Checkout**.

Also see **Check out and check in objects when using Multi-Site Collaboration**.

Edit properties

If you have appropriate access privileges, you can edit properties in Active Workspace.

- The properties you can edit vary based on how your administrator configured the style sheets.
- You edit properties in various panels and tables.

1. Display the part, document, or other object whose properties you want to modify.
2. Click **Edit** > **Start Edit**.

   The properties that you can edit are activated.

   > Note:
   >
   > The **Start Edit** button appears only when you select something you can modify.
   >
   > In some panels, such as the **Information** panel, a **Start Edit** button is available for quick edits. You must click **Save** before you navigate away to retain changes.

3. Type or modify the properties as necessary.

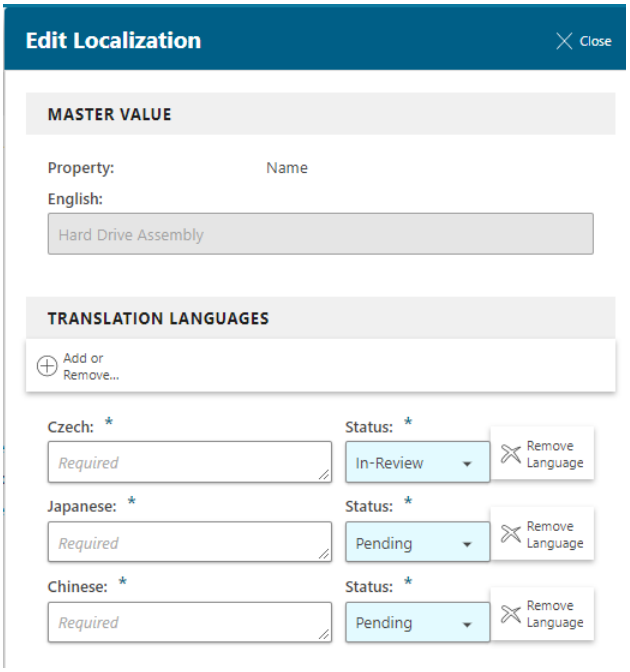
   As you edit, the cells appear with a different background color to indicate that the changes have not been saved. Once saved or cancelled, the background changes to its original color.

4. Save your changes by clicking **Edit** > **Save Edits**.

   To cancel your edits, click **Edit** > **Cancel Edits**.

Add multiple language properties for an object

When you are viewing the properties for an object some fields, such as the **Name** and **Description**, allow you to edit the localization information for those fields to add additional languages for the property. In addition, you can also set the status of the additional languages to track if they are pending, approved, or invalid.



1. When viewing the properties for an object, click **Edit Localization** next to the property you want to add different languages to.

   The **Edit Localization** panel opens. The **MASTER VALUE** section of the panel displays the property you are editing and it's default language.

2. In the **TRANSLATION LANGUAGES** section, click **Add** ⊕ to display a list of available languages.

3. From the list of languages, click the checkbox next to each language you want to add to the property. For each language you select, a new row is added in the panel.

4. Enter the translation text for each language and set the **Status** as necessary. You can choose to set the status to **Approved**, **Pending**, **In-Review**, or **Invalid**.

5. Click **Save** to save your changes and close the panel.

Delete a translated property value

You can delete a translated property value when it is no longer needed.

1. When viewing the properties for an object, click **Edit Localization** next to the property with the language you want to delete.

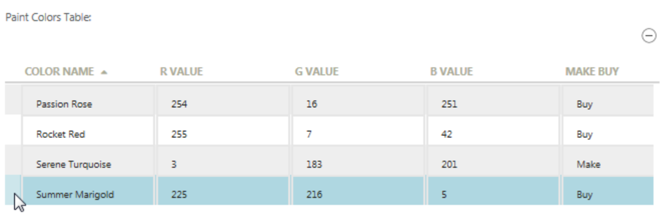
2. In the **TRANSLATION LANGUAGES** section, click **Remove Language** ⊗ next to the language you want to remove.

Alternatively, you can also deselect a language from the list of available languages to remove its translation.

3. Click **Save** to save your changes and close the panel.

Modify a table property

Properties identify specific characteristics about an object, such as the color and trim package of a selected make and model of car. Certain object properties are best represented using an editable table format. For example, a table format is useful when collecting repetitive data such as employee contact information. Table properties can be found anywhere that a property can be located, but most often table properties are located on the **Overview** or **Table Property** tab.


Paint Colors Table:

COLOR NAME	R VALUE	G VALUE	B VALUE	MAKE BUY
Passion Rose	254	16	251	Buy
Rocket Red	255	7	42	Buy
Serene Turquoise	3	183	201	Make
Summer Marigold	225	216	5	Buy

> Note:
>
> A table property is defined and configured in the Business Modeler IDE by an administrator. Some table properties may be configured to be noneditable, in which case, the following steps do not apply.

You can complete the following actions on a table property:

Add a row

1. Open the object and go to the tab for the table property. This is typically the **Table Property** or **Table Property LOV** tab.

2. Click **Edit** > **Start Edit** .

3. Click **Add** to add a row to the property table.

4. Add the appropriate data in the cells of the new row.

5. Click **Edit** > **Save Edits** .

Remove a row

1. Open the object and go to the tab for the table property. This is typically the **Table Property** or **Table Property LOV** tab.

2. Click to highlight the row to delete.

3. Click ⊖ located at the upper right corner of the table.

Duplicate a row

1. Open the object and go to the tab for the table property. This is typically the **Table Property** or **Table Property LOV** tab.

2. Click **Edit** > **Start Edit**.

3. Click a cell in the row to duplicate.

4. Click **Duplicate** located at the upper right corner of the table.

5. Make any changes to the data in the cells of the duplicated row.

6. Click **Edit** > **Save Edits**.

Modify data in a row

1. Open the object and go to the tab for the table property. This is typically the **Table Property** or **Table Property LOV** tab.

2. Click **Edit** > **Start Edit**.

3. Click each cell to modify the data in that cell.

4. Click **Edit** > **Save Edits**.

Define properties in addition to the object's configured properties

You can add properties to objects that are in addition to the configured properties. For example, in an automotive environment you can define variable properties for each vehicle, such as model, weight, and manufacture date. Or in a shipping environment, you can define a package's weight, shipping address, and size. These are properties that are defined ad hoc and associated with the object.

This functionality must be configured by an administrator.

1. Search for the object using the search box, or navigate to it in your folder structure.

2. (Optional) Filter the list to quickly find the desired object.

3. Click **Open** .

4. Click the appropriate tab.

   The tab reflects the name defined by your administrator for your organization. Most often, the tab name reflects the type of information you are defining.

5. Click **Edit** .

6. Click **Add** .

7. In the **Create** panel, define the **Type**, **Name**, and **Value** for the property you are adding. Refer to the five supported property types in the following list.

   Note:

   The field values that display on the **Create** panel reflect the selected **Type** and **Value**, where **Name** is the name of the property you are defining.

   You cannot define the same name for multiple property types.

Type	Value
String	An alphanumeric character string.
Double	A numeric value containing a decimal point.
Boolean	A binary variable; either true or false.
Date	A date and time selected from the calendar and time pickers.
Integer	A numeric value

8. Click **Add**.

   The name and value are added to the table.

NAME	VALUE
Model	SUV
Weight	5345.453
Towing Package?	true
Manufacture Date	12-Oct-2016 02:00
Doors	5

9. Click **Save**.

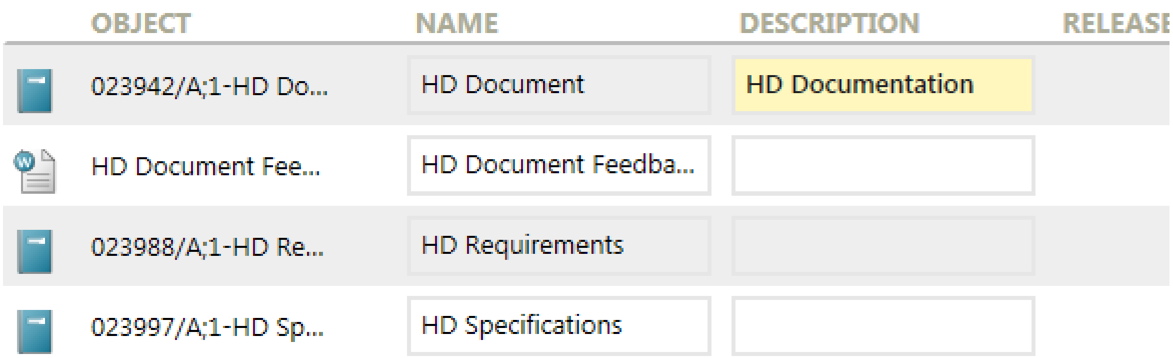
Autofill properties in a table

Copy the content of a selected table cell to a range of cells above or below the selected cell.

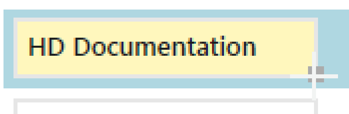
1. Display the table and click **Edit** > **Start Edit**.

OBJECT	NAME	DESCRIPTION
023942/A;1-HD Do...	HD Document	
HD Document Fee...	HD Document Feedba...	
023988/A;1-HD Re...	HD Requirements	
023997/A;1-HD Sp...	HD Specifications	

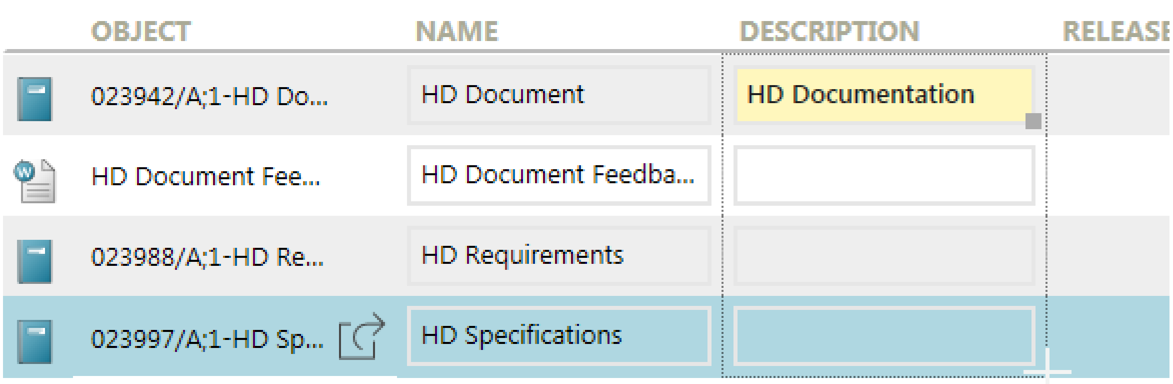
2. In the table, select a cell and, if the cell is empty, enter the content to be copied.



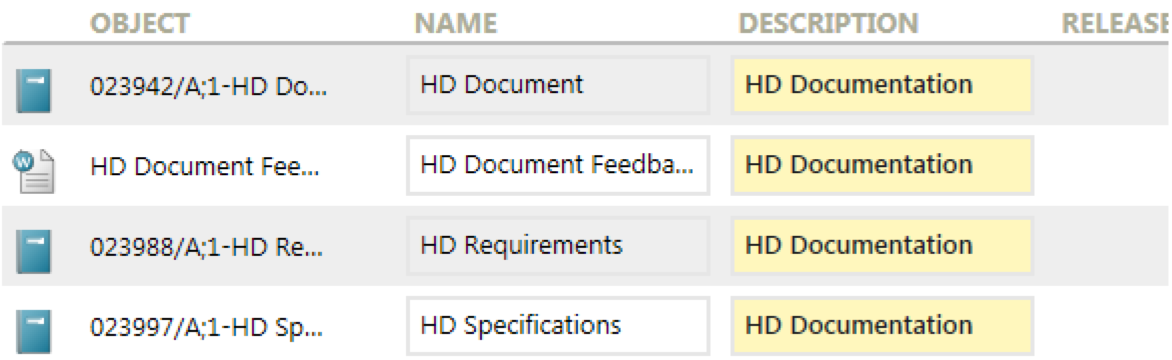
3. Move the mouse cursor over the cell to display the small fill-down box in the lower-right corner of the cell, then place the cursor over the small box to display the large plus sign (**+**).



4. With the plus sign displayed, press the left mouse button and drag up or down to select the cells to fill.



5. Release the mouse button.



6. Click **Edit** > **Save Edits** to save your changes.

   The changes are saved, except for objects that you do not have **Write** privileges to modify properties.

Drag-and-drop between browser windows

You can use drag-and-drop between *similar* web browser windows to copy parts, documents, or other objects from a location in Active Workspace in one window onto another accepting object or location in another Active Workspace window.

Similar web browser windows are browser windows of the same type.

For example:

- You can drag-and-drop objects between two similar browser windows when a single browser, such as Chrome, is running Active Workspace in multiple windows.

- You cannot drag-and-drop objects between dissimilar browser windows, such as between a Chrome window and a Firefox window.

> Note:
>
> To drag an object, you must click, hold, and move the object in a single fluid motion. If you do not move quickly enough, the system assumes you want to select multiple objects.
>
> An accepting object is one that supports a relationship with the object being dragged and dropped. When you cannot drop onto a location or object, the cursor has an associated cancel symbol.

You can use drag-and-drop between dissimilar browser windows, such as between a Firefox window and a Chrome window, to open a selected part, document, or other object.

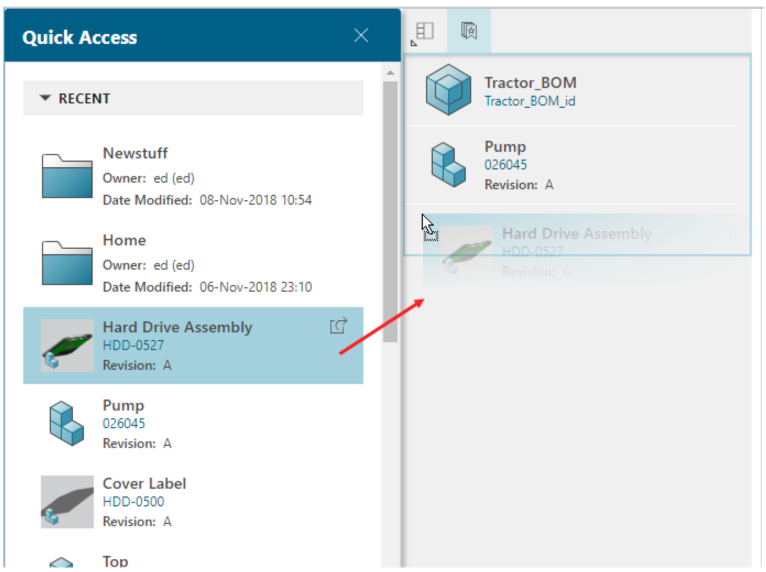
For example, you can select an Active Workspace object, such as a part or document in a list, and drag-and-drop that object to the URL address box in another browser. This opens the dropped object in Active Workspace in the second browser window.

Drag-and-drop in lists and tables

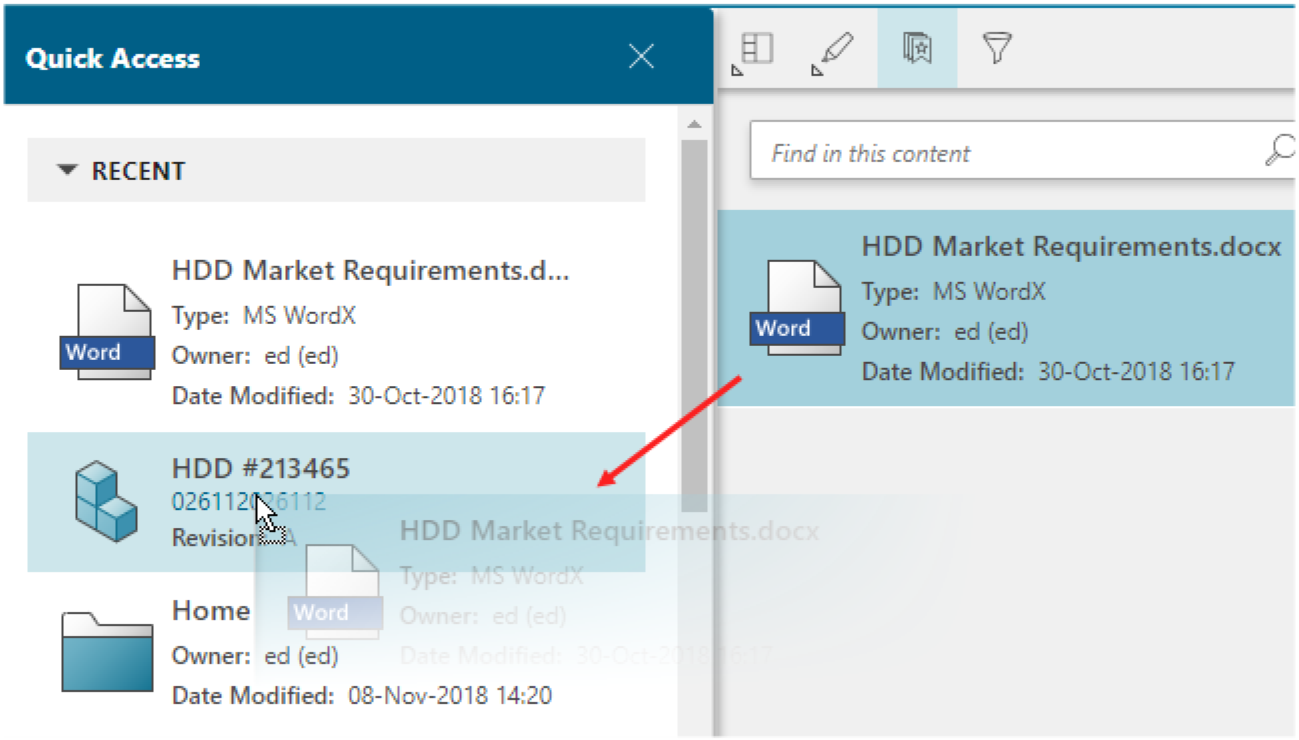
You can drag-and-drop one or more parts, documents, and other objects:

- Into an accepting list or table to create a new entry in the list or a new row appended to the end of the table.

  When you drag, you see a blue outline around the table or list to indicate where you are allowed to drop.



- Onto an accepting object (table row or list item.) In this case, the accepting object highlights indicating where you are allowed to drop.



Note:

To drag an object, you must click, hold, and move the object in a single fluid motion. If you do not move quickly enough, the system assumes you want to select multiple objects.

An accepting object is one that supports a relationship with the object being dragged and dropped. When you cannot drop onto a location or object, the cursor has an associated cancel ⊘ symbol.

You can drop one or more objects onto a table to create a new table row.

1. Click, hold, and move the object to the table header row.

   A bounding box appears to indicate you can create a new row with the object.

2. Release the object to create the new table row.

You can drag parts, documents, or other objects onto an accepting table row and have that row create appropriate relationships to those objects.

For example, you can drop a document onto a part in a table, and the document becomes a child of the part.

Create alias IDs and alternate IDs

Alias IDs and alternate IDs allow you to better manage your part data, such as supplier part numbers, customer naming standards, and legacy part names. Alias IDs and alternate IDs are associated with the Teamcenter object. You can then search and filter for these IDs to quickly find the objects, or set your **ID Display Rule** to display them as you work with a part.

> Note:
>
> When creating an alias ID or alternate ID, you must choose an ID context. This is configured by your administrator.

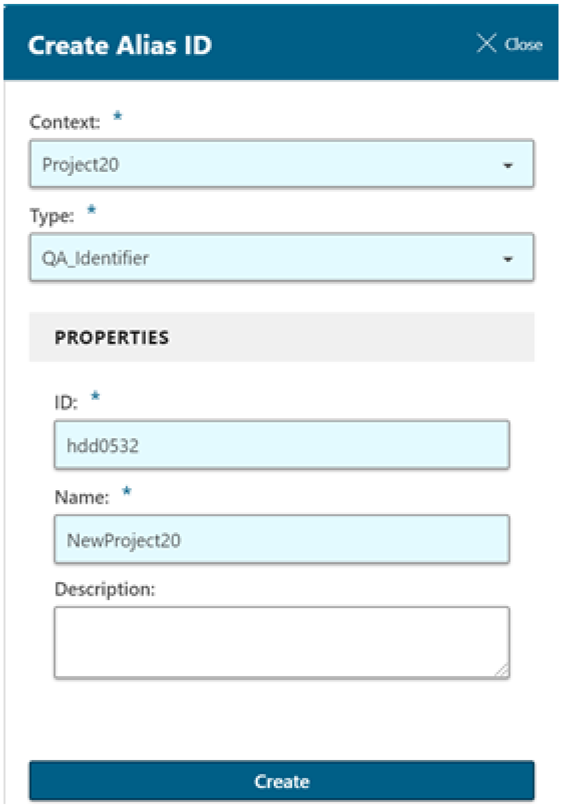
Create an Alias ID

An alias defines the ID of an object you do not have direct control over, such as supplier part numbers. It can also be used when the same ID can be applied to more than one object, such as a service part number. You create an alias when the part is similar to the current part and it can be used as a substitute in the product structure.

1. Search for and open the item revision you want to create the alias ID for.

2. On the primary toolbar, click **New** > **Create Alias ID**.

   The **Create Alias ID** panel opens.



3. Choose the **Context** and **Type** for the alias ID and enter the ID properties.

4. Click **Create**.

   The related object now shows the newly created alias ID in the **ALIAS IDS** section of the **Overview** tab.

Create an Alternate ID

An alternate ID defines additional IDs for an object. However, the alternate ID relates to only one unique identifiable object. Alternate IDs are often used to create different part numbers as an object evolves or to create a part number for a part used across multiple organizations. You create an alternate ID when the part is identical to the current part and you want to create your own naming scheme instead of using the existing one.

1. Search for and open the item revision you want to create the alternate ID for.

2. On the primary toolbar, click **New** > **Create Alternate ID** tab.

3. Choose the **Context** and **Type** for the alternate ID and enter the ID properties.

4. Click **Create**.

The related object now shows the newly created alternate ID in the **ALTERNATE IDS** section of the **Overview**.

Create a new revision of existing data

In Active Workspace, data is called an object. An object describes a part, design, document or other entity stored in your system. You can create new revisions of existing objects.

To learn more about objects, see **Object types in Active Workspace**.

Procedure

1. Open the object for which you want to create a new revision.

2. On the Primary toolbar, select **New** > **Revise**.

   The **Revise** panel opens.

3. Optionally modify the **Revision**, **Name** and **Description** fields.

   These fields are automatically populated when the panel opens.

4. In the **PROJECTS** section, click **Add Project**, select a project as owner of the new object, and click **Assign**.

   > Tip:
   >
   > You can use **SEARCH** to filter the list of projects.

5. Click **Save** to create and save the new object.

Create new data from existing data

In Active Workspace, data is called an *object*. An object describes a part, design, document or other entity stored in your system. You can create new objects from existing objects.

To learn more about objects, see **Object types in Active Workspace**.

Procedure

1. Open the object from which you want to create a new object. If the object has multiple revisions, select the revision on which to base the new object.

2. On the Primary toolbar, select **New** > **Save As**.

The **Save As panel** opens.

3. Enter a name for the new object in the **Name** field.

4. Enter a description of the new object in the **Description** field.

5. In the **PROJECTS** section, click **Add Project** ⊕, select a project as owner of the new object, and click **Assign**.

   > Tip:
   >
   > You can use **SEARCH** to filter the list of projects.

6. Click **Save** to create and save the new object.

Working with attachments

Add attachments

1. Display and open something to which you want to attach another file or document. For example:

   - Perform a search and select something in the search results list.

   - Select an inbox task.

   - Open a folder where you want to add an object.

2. Locate the **Add to** ⊕ icon in the work area of the **Overview** tab.

   For example, in the default Active Workspace configuration there is an **Attachments** tab for item revisions. This tab has **Files** and **Documents** sections to which attachments can be added.

3. Click **Add to** ⊕ to display the **Add** task pane.

4. In the **Add** pane, choose the objects you want to add by doing one of the following.

   - Click **Search**.

     The search only returns results that you can relate to the displayed item. You can also filter search results in the task panel.

   - Click **Palette** to select from the **Favorites**, **Recent**, or **Clipboard** sections.

     The **Clipboard** section displays objects previously copied to the paste buffer using **Copy**. These are preselected at this point. Otherwise, select the desired objects.

- Click **New** to create a new object:

  a. Select the type of object you want to create either from the list of recently used object types or from the full list of available object types. You can also refine the results using **Filters**.

     If you are creating a new file attachment, you can upload an existing file as an attachment to the new object. Click the **Choose File** button and select the desired file. Active Workspace automatically sets the object type to the file type that matches the file extension. If there is more than one choice, the client selects the default but you can change it.

  b. Enter the properties for the new object.

     The properties vary depending on the type of object being created. These properties are configured by style sheets, which are maintained by the system administrator.

     > Note:
     >
     > Required properties are designated with a red asterisk next to the text box.

5. (Optional) When multiple relation types are available for the object being added, select the desired relation from the list displayed at the bottom of the **Add** pane.

   The available options vary based on the object set selected.

6. Click **Add**.

Replace an attached file or document

You can replace an attached file when it is out of date and no longer relevant to the item is it attached to. You can replace the attachment with an updated version of the file or with a different file altogether.

1. Search for and open the object with the attachment you want to replace.
2. Click the **Attachments** tab.
3. Select the attachment that you want to replace.
4. From the primary toolbar, click **Edit** > **Replace File**.

   The **Replace** panel is displayed.

5. Click **Choose File** to select the file to replace.
6. Click **Replace**.

Replace an attached document

In addition to replacing attached files for an object, you can also replace attached documents.

1. Search for and open the object with the document you want to replace.
2. In the **DOCUMENTS** section, select and open the document you want to replace.

   The **Overview** tab for the document is displayed.
3. In the **FILES** section, select the file you want to replace.
4. From the primary toolbar, click **Edit** > **Replace File**.

   The **Replace** panel is displayed.
5. Click **Choose File** to select the file to replace.
6. Click **Replace**.

Replace files using Data Share Manager

If you have Teamcenter Data Share Manager installed perform the following steps to replace files.

1. To display the attachments for an object, open the object.
2. Click the **Attachments** tab.
3. Select the dataset to replace.
4. Click **Edit** > **Replace File** to display the **Replace** panel. If you are replacing a single file, the **Data Share Manager** application window is displayed.

   If you are replacing a file in a dataset that has multiple files, select the file in the **Replace** panel and click **Replace**. The **Data Share Manager** application window is displayed.
5. In the Data Share Manager application window, locate or enter the replacement file. Then, click **Upload**. The selected file is uploaded and replaces the previously attached file. The Data Share Manager displays the upload status.

> Note:
>
> See Upload or download large data files for more information on using Teamcenter Data Share Manager in Active Workspace.

Find more information about the Data Share Manager in *System Administration→File Management System* in the Teamcenter help collection.

Download and open attached files

You can download attached files and potentially open them in the same operation, depending on browser settings. You can optionally download multiple files in a single download operation.

1. Display an object that has attachments.

2. Select the attachment.

3. Do any of the following:

   - Select the attachment and click **Download File**.

     Based on your browser settings, the file may open immediately or you may be prompted to download or save the file.

     > Note:
     >
     > To open attachments in the Safari browser, be sure to turn off the pop-up blocker. This is especially true on iPads running Safari.

   - Right-click the attachment and then select **Copy File Download Link** to copy the download link to the Teamcenter and OS clipboard. You can then share the link with others, or paste it into your browser's address bar to download the file.

     > Note:
     >
     > If your administrator has enabled reference lists, such as in a table for an item revision and its subtypes, on the **Information** panel of an attachment, or in the **Properties** of an object and its subtypes, all referenced files are hyperlinks. You can click the link to quickly download the referenced file.

Download multiple files at once

1. Display an object's attachments.

2. Do any of the following to select multiple files:

   - Ctrl-click each file you want to select.

   - Click **Selection Mode** and then click the check box next to each file you want to select.

   - Click **Select All** to select all files.

3. Click **Share** > **Download** .

   Active Workspace displays a message showing you how many of the selected files were downloaded.

Note:

The saved location of the downloaded files and the ability to download more than one file at a time varies depending on your browser and its settings.

View and download previous file versions

You can view and download previous file versions of files displayed in the **Attachments** tab for an object, or when viewing the properties of the attachment. This allows you to download old file versions, or restore an older version so it becomes the latest version of the file.

1. Search for an object and then navigate to the **Attachments** tab.

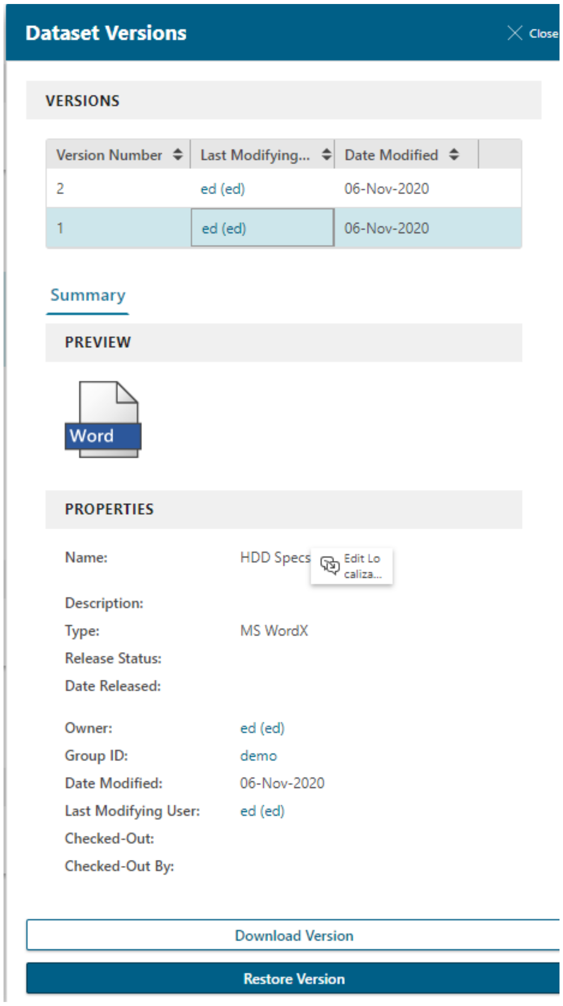
2. In the **FILES** section, select the attached file with the previous version you want to view.

3. From the primary toolbar, click **View** > **Show Dataset Versions** .

   You can also use the above command when viewing the properties for an attached file.

   The **Dataset Versions** panel opens.

4. In the **VERSIONS** section, select the file version to view its properties and a preview of the file.



5. Do any of the following as necessary:

   - Click **Download Version** to download the selected version to your computer.

   - Click **Restore Version** to make the selected version the latest version of the file. A new version is automatically created and displayed in the **VERSIONS** section.

6. Close the **Dataset Versions** panel when you are finished.

Open related drawings

You can view drawings attached to an item revision in the **Attachments** of an open data object.

1. Open an object that has drawings attached to an item revision.

2. Select the desired item revision and then select **Open**.

3. Select the **Attachments** tab.

All of the drawings related to the item revision appear under **FILES**.

View and mark up your attachments using the universal viewer

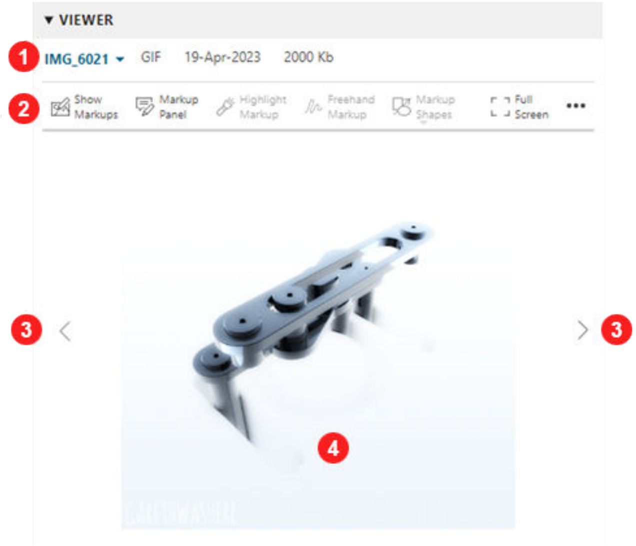
Use the universal viewer to view object attachments. The universal viewer is displayed in an object's **Overview** tab if there are attachments for the object, or in a workflow task's **Overview** tab if there is an associated attachment. The universal viewer can appear in other areas within Active Workspace, depending on how your administrator has configured Active Workspace for your site.

The universal viewer supports the following file types.

- PDF- Markup is available.
- Text
- HTML- Markup is available.
- Microsoft Office files- Editing is available depending on how Office Online configuration is set up.
- Image (JPEG, PNG, GIF, BMP, SnapShotViewData, and UGMASTER)
- Direct Model

> Note:
>
> The file types and the functionality supported will depend on how your administrator configures the universal viewer for your site.

Example of an image with the universal viewer



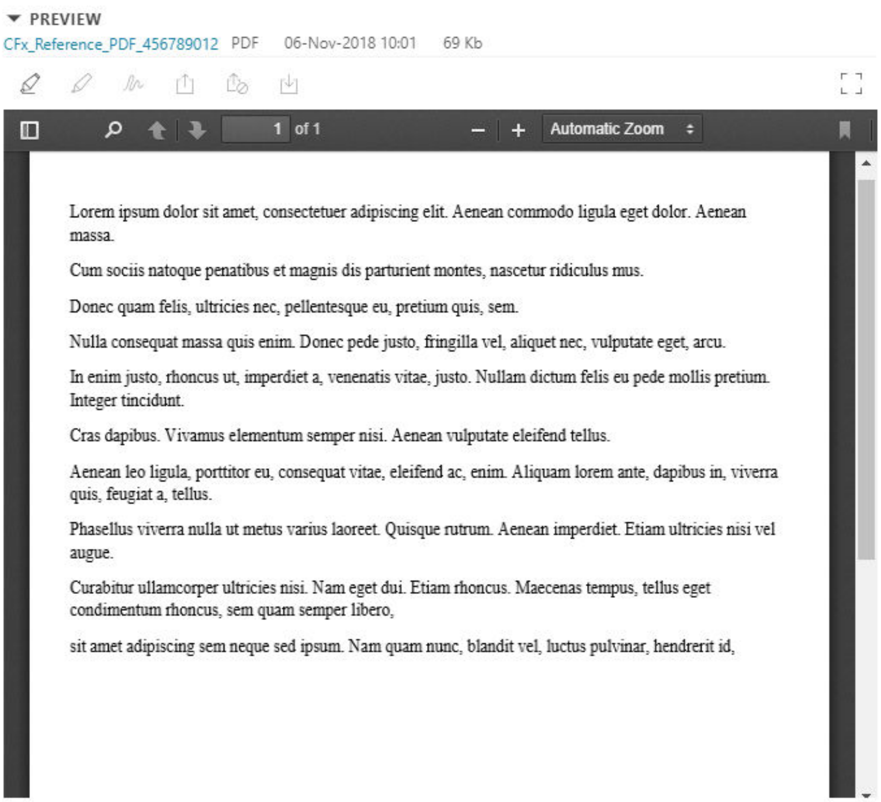
1 The document header identifies the document's name, file type, and last date and time the document was modified. Click the document name to open the file.

2 The work area toolbar contains the commands specific to the type of file or document displayed.

3 If a selected object has multiple attachments, click 〈 or 〉 to scroll backward and forward through all the attachments.

4 Review the document or file image that is displayed the viewer.

Example of a PDF document with the universal viewer



Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.

Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus.

Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem.

Nulla consequat massa quis enim. Donec pede justo, fringilla vel, aliquet nec, vulputate eget, arcu.

In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis eu pede mollis pretium. Integer tincidunt.

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Phasellus viverra nulla ut metus varius laoreet. Quisque rutrum. Aenean imperdiet. Etiam ultricies nisi vel augue.

Curabitur ullamcorper ultricies nisi. Nam eget dui. Etiam rhoncus. Maecenas tempus, tellus eget condimentum rhoncus, sem quam semper libero,

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Your options using the universal viewer vary, based on the type of file you are viewing. Typical commands on this toolbar include the following.

Markup	You can mark up a PDF or image file from within the universal viewer.
Create Highlight Markup	Mark up a text by highlighting it.
Create Freehand Markup	Mark up a document by drawing freehand.
Checkout	Check out an Office document so it can be edited.
Cancel Checkout	Cancel the check out on an Office document and throw away any changes.

Checkin	Check in the Office document to save any changes. There is no separate save command necessary.
Full Screen	View the Office document in full-screen mode. This allows the universal viewer to take over the full browser window for the display.

Upload or download large data files

The Teamcenter Data Share Manager (DSM) application provides a way for you to upload and download large data files without interrupting your work in Active Workspace.

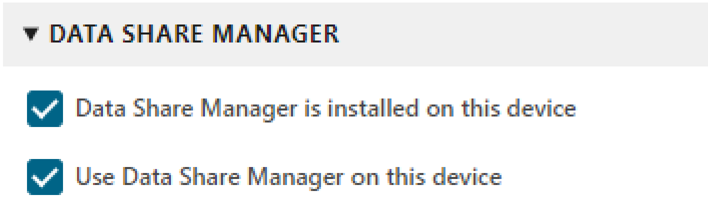
The following apply:

- You can close Active Workspace and the browser while the DSM is loading file data without interrupting the loading process.
- The DSM application automatically resumes loading data after interruptions, such as network or power outages.

> Note:
>
> You (or your administrator) must install the DSM application on your machine, and you must have a valid license key. Find DSM installation and detailed user instructions in *System Administration→File Management System* in the Teamcenter help.

Before using the Data Share Manager

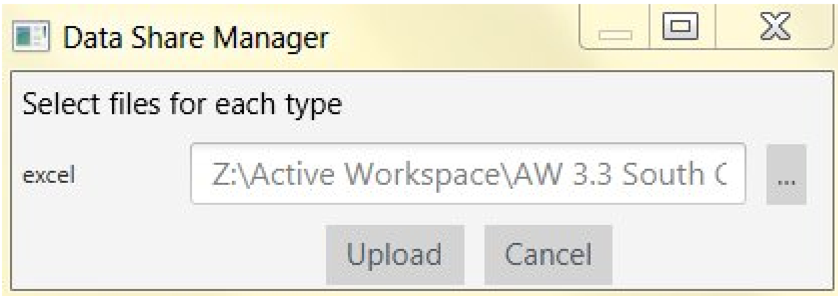
1. Ensure that the Data Share Manager and a license key are installed on your local machine. Contact your administrator for assistance.
2. Ensure that your Data Share Manager user session values are selected in Active Workspace.
   a. Select the profile icon in the lower corner of navigation on the left side of the Active Workspace home page.
   b. In the panel that opens, select **Profile**.
   c. Under **DATA SHARE MANAGER**, make sure that the **Data Share Manager is installed on this device** and **Use Data Share Manager on this device** check boxes are selected.



> Note:
>
> These values remain selected until you clear your browser cache or change browser applications. If you clear your cache or switch to a different browser, you must select these values again before using the DSM.

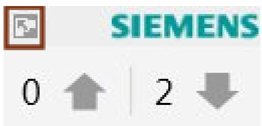
Upload a large data file

1. Navigate to the object to which you want to upload the data file.
2. Click the **Attachments** tab.
3. Define the data file type that you want to upload (for example, PDF, Word, or Excel).
    a. Click **Add to** ⊕.
    b. In the **Add** panel, select the file type of the data file that you want to upload.
    c. In the **Name** box, define the name of the file you want to upload.
    d. Click **Add**.
4. In the message that appears on the window, click **Open**.
5. Select the desired file to upload.
    a. From the task bar on your computer, open the Data Share Manager application window.
    b. In the Data Share Manager application window, enter the path or file location, or click **...** to navigate to the file to upload, and then click **Upload**.



The collapsed Data Share Manager window appears at the bottom of your window, showing the number of files that you have uploaded or downloaded.

6. Click **Open** in the Data Share Manager window.



7. Use the Data Share Manager application to manage your uploaded files. Find information about the Data Share Manager in *System Administration→File Management System* in the Teamcenter help.

Download a large data file

1. Navigate to the object with the attached data file that you want to download.

2. Click the **Attachments** tab.

3. Click **Download File** on the file that you want to download.

4. Click **Open** on the message that appears on the window.

   The collapsed Data Share Manager window appears at the bottom of your window, showing the number of files that you have uploaded or downloaded.

5. Click **Open** on the Data Share Manager window.

6. Use the Data Share Manager application to manage your downloaded files. Find more information on the Data Share Manager in *System Administration→File Management System* in the Teamcenter help.

Working with named references

Named references

Active Workspace has some support for Teamcenter datasets, named references, and dataset tools.

- Datasets are Teamcenter data objects that manage data files (operating system files) created by other software applications. Each dataset can manage multiple operating system files as separate "named references".
- Named references are objects that relate to a specific data file. In other words, a named reference is a file attached to a dataset.

> Note:
>
> Teamcenter administrators can define named references and optionally restrict some file types from being uploaded to a dataset.

Upload, download, and export named references

Named references for an opened object appear in the **Named References** tab of the **Information** panel for an open attachment object.

Prerequisites

To download or export named references, an object must have one or more attachments, and a selected attachment must have one or more named references.

Procedure

1. Locate an object such as a part and open it.
2. On the work area toolbar, select **Attachments**.

   The **Files** section displays existing attachments as tiles.
3. In the **Files** section, select an attachment tile.
4. On the primary toolbar, select **Information** ⓘ to open the **Information** panel.
5. In the **Information** panel, select the **Named References** tab.

Results

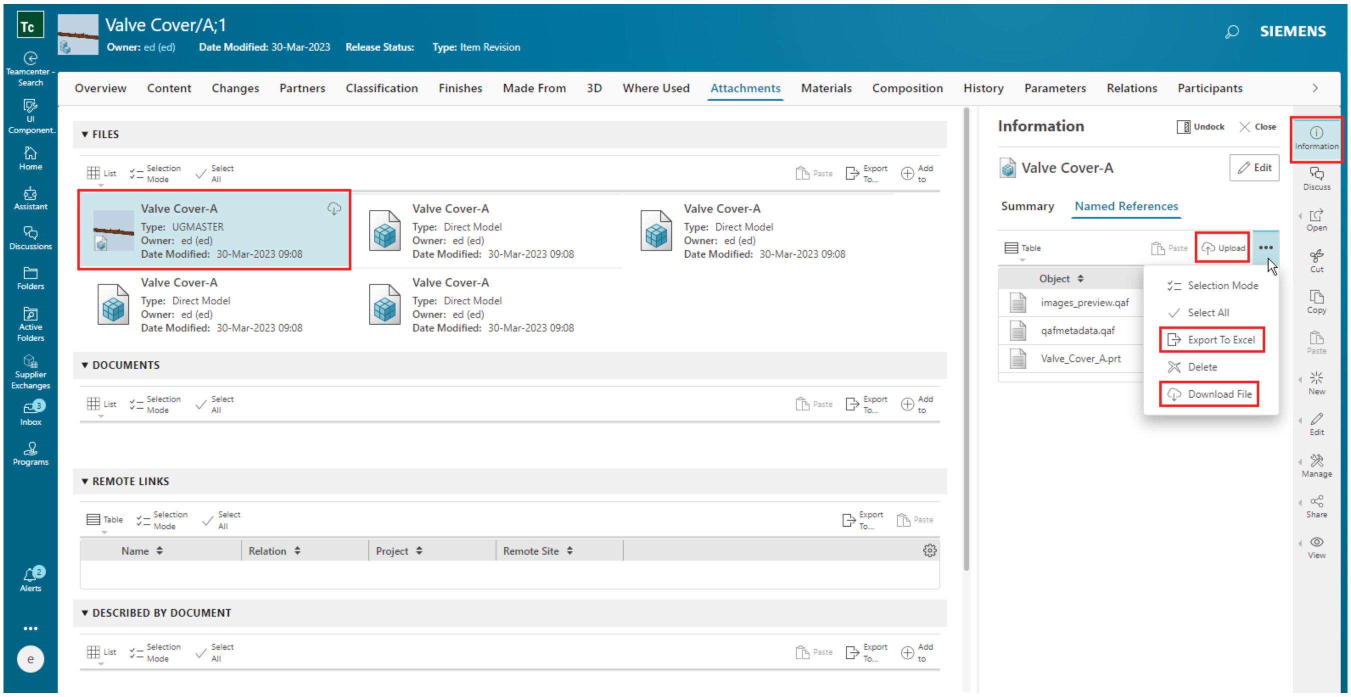
Named references appear in a table. You can now select a named reference and run any of these commands:

- **Download** selected files.
- **Upload** a file to the selected dataset.
- **Delete** a file from the selected dataset.

You can run the commands from the **Named References** toolbar. Its appearance can vary according to your screen resolution.

The commands may appear as icons only or icons plus a text label. Some icons may be hidden if there is insufficient space, in which case an ellipsis (**...**) appears on the toolbar. Select it to reveal hidden commands.

> Tip:
>
> Resizing the **Information** panel wider can reveal hidden commands on the toolbar.



Exploring relations between objects

Tips for using Relations

You can use *Relations* to view objects and the relations between objects in a graphical format.

- See or hide incoming and outgoing relations.
- Choose what objects or relations appear in the work area. You can do this by using the **Legend** panel or by applying filters based on object properties.
- Use an overview map to navigate large structures.
- Change the layout of the network display.

Tips for using Relations

- Double-click the background to resize the network to fit all content in the display.
- Use the left mouse button to drag the network around the display area. To move an individual object, click the object first and then drag it using the left mouse button.
- Use the roller on your mouse to zoom in and out of the network. The more you zoom in, more detailed information is displayed.
- Point the mouse over an object in the network to display additional details, such as the object name.
- Point the mouse over an edge (that is, a line connecting two objects) to display the type of relationship between the objects.
- Select an object, edge, or port and then click **Info** ⓘ to get more information about it.

  You cannot see the ⓘ button if the edge has no properties.
- To print a network, click **Open** and choose **Open in Print View**.

View related data

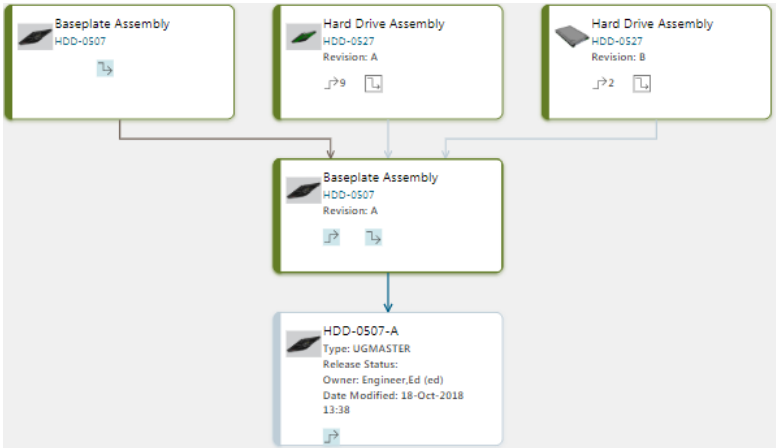
This topic explains the procedure for viewing related data.

1. Search for an object using the Active Workspace search feature.
2. From the list of search results, select the object for which you want to view the related data.

   This is the root object.

3. Select the **Relations** tab.

   By default, the object and its immediate relations appear.



   You can do the following actions:

Action	Ways to perform the action
Expand and collapse objects	Click arrows inside the objects to expand or collapse incoming relations
	Click arrows inside the objects to expand or collapse outgoing relations
	Use the one-step command bar
Show and hide objects	Using Legend
	Clicking the icon of the object
Make hidden objects visible	Using the Relations panel
Filter objects	Using the Filter panel
Highlight objects	Using Legend
	In the diagram, highlight objects that have relations going in the same direction.
Navigate the diagram	Using the overview map
Change the layout of the diagram	Using the layout command

4. Click the arrows inside the objects to show or hide relations:

Shows all the incoming relations.

Shows all the outgoing relations.

Hides the incoming relations for the object.

Hides the outgoing relations for the object.

Hides all the incoming relations or shows all the incoming relations, as applicable.

Hides all the outgoing relations or shows all the outgoing relations, as applicable.

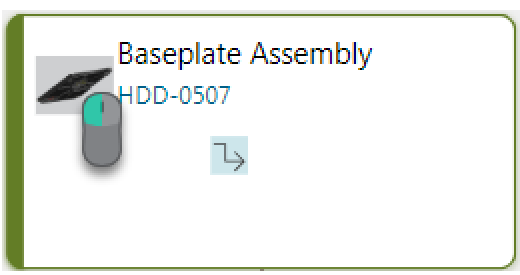
5. You can also show incoming and outgoing relations from the one-step command toolbar as follows:

   Select an object and click one the following buttons in the one-step command toolbar.

   Shows incoming relations. In the list that appears, select the number of levels to be displayed.

   Shows outgoing relations. In the list that appears, select the number of levels to be displayed.

6. Click the icon of an object to hide the object.



   The object fades away until it is hidden. You can cancel the hide action by clicking its icon again before it is hidden.

7. To show the object that you hid by clicking on its icon or to hide objects in the graph, select an object and click **Relations**.

   In the **Relations** panel:

   - Objects whose icons are grayed out are hidden in the graph. Click the objects to make them visible.

- Objects whose icons are not grayed out are visible in the graph. To hide objects, click them.

8. Using the **Legend** panel, you can highlight and hide objects and relations.

   Click **Legend** to display the **Legend** panel and then click **Views**.

   The colors of the object types and relations listed in the **Legend** panel correspond to those of the object border and edges, respectively, in the work area.

1. Click the colored square next to the object or relation name to hide or show objects or relations in the work area.

   > Note:
   >
   > The root object cannot be hidden. Orphan objects, that is, objects whose predecessors are hidden, are also hidden.

2. Select the object or relation name to select the object or relation in the work area.

   Use Ctrl + click in the menu to select multiple objects or relations.

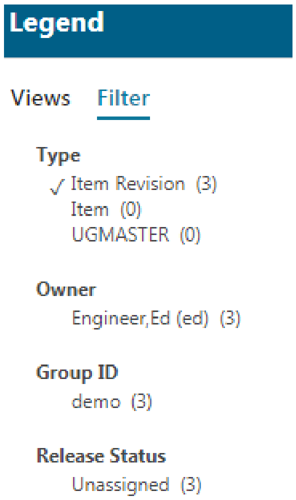
   If you select or undo the selection of an object in the work area, the corresponding object type is selected in or cleared from the **Legend** pane.

   When you expand a selected object in the work area, all other selections for objects are cleared.

3. The number within the parentheses denotes the number of expanded objects or relations that are visible.

The icon at the bottom right corner indicates that objects and relations are hidden in the graph.

9. You can choose the objects that you wish to see in the work area by filtering them based on their properties such as *object type* or *owner*.



a. Click **Legend** to display the **Legend** pane and then click **Filter**.

b. Click the property of the object that you want to use as a filter, for example, under the **Type** property, click **Item Revision**.

c. To remove a filter, click the selected property.

> Note:
>
> The root object cannot be filtered out. Orphan objects, that is, objects whose predecessors are hidden, are also filtered out.

The icon at the bottom right of the page indicates that a filter is applied.

10. You can investigate the relations between objects at two ends in the diagram as follows:

    a. Select an object in the graph.

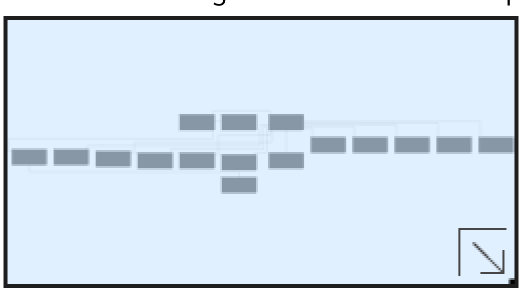
    b. Press the Shift key and select another object in the graph.

    Objects with similar relations going in the same direction are highlighted.

11. Use the overview map to navigate easily in cases where there is a large network of objects and relations.

    Click the lower right corner of the work area to view the overview map of the network.

    Move the rectangle in the overview map to browse the network.

    .

12. Click in the one-step command toolbar to change the layout of the network display.

    You can display the content using various layout types, such as top to bottom and left to right.

Managing object relationships and traceability with trace links

Trace links overview

Traceability provides a connection between objects in Active Workspace. For Model-Based Systems Engineering, this means connecting our structure elements together.

Trace links establish the traceability among structure elements and in which one object takes precedence over another. A trace link establishes a directional relationship between two objects.

For example, creating links between requirements, between system model blocks, and between each other. When the requirements and system modeling are complete, users have complete traceability from requirements, to functions, to logical and physical objects allowing users to see the decision, requirements and alternatives that lead to a particular design alternative.

The trace link **Start** (defining object such as a requirement), is the trace link source. The **End** (the complying object such as a system model block), is the target. In this relationship, the **Start** defines a condition with which the other **End** must comply, that is, must partially or completely fulfill.

Create a trace link

You can create trace links between objects such as requirements and system model blocks.

> Note:
>
> You can create a one-to-many or a many-to-one trace link relationship, but you cannot create a many-to-many trace link.

1. Ensure that you have the objects that you want to link in the results pane.

2. Click **New** > **Create Trace Link**.

   > Tip:
   >
   > If you want to create multiple trace links, click **Pin** in the **Create Trace Link** panel. Pinning keeps the **Trace Link** panel open after you create a trace link. You can then create another trace link by changing the **Start** or **End** objects.

3. Drag the selected objects to either the **Start** or **End** panels.

   > Tip:
   >
   > To remove objects from the trace link, select the requirements in either the **Start** or **End** panel, and then click **Remove**.

4. Select the **Type**, and then click **Create**.

Create a trace link using Copy and Paste

You can also create trace links using copy and paste.

1. Ensure that you have the objects that you want to link in the results pane.
2. Select one or more objects, and then click to copy the selected objects to the clipboard.

   You can copy objects from one browser window and paste into another window.
3. Click **New** > **Create Trace Link**.
4. Click **Paste** in either the **Start** or the **End** panel.
5. Select the **Type**, and then click **Create**.

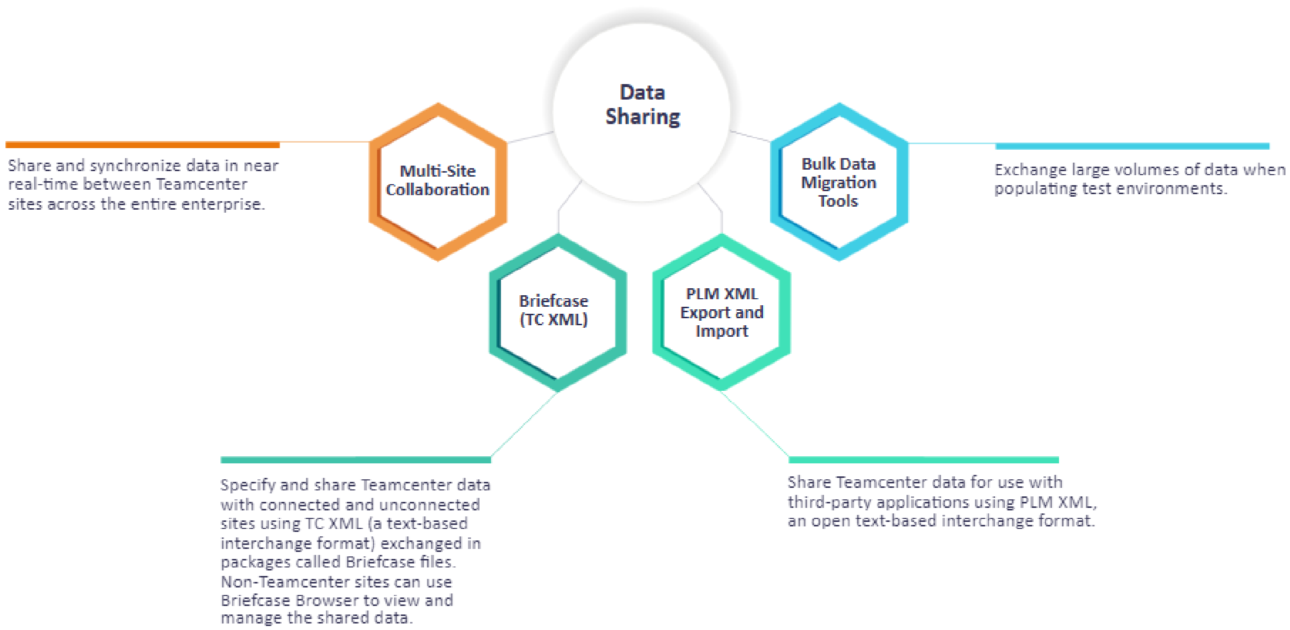
Sharing data

Sharing Teamcenter data with other sites

Product design and development often includes groups of people scattered across multiple locations. Even with different responsibilities, these groups of people might rely on the same product data to perform their roles.

- Several groups within your company might rely on having access to a project's latest updates as they work on different aspects of the project. These groups may be on site or in other parts of the world.
- Outside organizations, such as suppliers supporting OEMs, may have similar data requirements. The suppliers may need a mix of read and write access to the data as they may be responsible for the development of certain parts of the project.
- Some groups may be downstream customers with applications that leverage your data as part of their business processes.
- You may be combining or archiving existing sites as the company structure changes or projects are retired.

Active Workspace provides several ways to share data to meet these needs:



Typical uses of each data sharing solution

Data Sharing Solution	Typical Use
Multi-Site Collaboration	A company has engineering sites in Tokyo and Detroit. They also have manufacturing sites in Detroit. All of the sites are connected on a network. The engineering sites regularly share data as they design and develop products. At the end of each workday at the engineering sites (which are 11 hours apart), they use Multi-Site to make sure each site has the most recent product data updates. When the product development completes, the engineering sites use Multi-Site to push the final engineering data to the manufacturing sites.
Briefcase and TC XML	An OEM produces a complex product with a component that has its design outsourced to a supplier. The supplier does not have access to the network the OEM uses. The OEM packages the component data the supplier is responsible for and shares the Briefcase file using secure FTP. The supplier imports the data and updates it with changes and new parts. The supplier then repackages the parts data in a Briefcase file and sends it to the OEM for review and integration with the overall product.
PLM XML	An OEM works with a supplier that uses a PLM solution other than Teamcenter. To exchange product data, the companies need a common data format. The OEM converts the relevant product data to PLM XML which has a published SDK and uses a product-neutral data model. The supplier converts the PLM XML into the

Data Sharing Solution	Typical Use
	data model their PLM tools use, imports the data, and modifies it as necessary. The supplier converts the modified data back to PLM XML and returns it to the OEM.
Bulk data migration tools	A company has several organizations relying on Teamcenter for their daily work activities. System availability is critical. The company plans to upgrade Teamcenter and Active Workspace to the most recent version, but they want to ensure the updates cause minimal down time. The company creates a Teamcenter test environment using the upgraded versions of Teamcenter and Active Workspace. They use the bulk extract tools to get a copy of the product data from their production environment. They then use the bulk copy tools to populate their test environment with the production data copy. There, they perform a battery of tests to ensure the new versions of Teamcenter and Active Workspace work as expected with their product data.

Where do I go from here?

Administrator	
Configure your organization for sharing objects packaged in Briefcase files	See the section on how to configure Briefcase file sharing.
Monitor any issues your organization may be having when sharing Teamcenter data using Multi-Site	See Multi-Site Dashboard to view the issues in your Multi-Site federation using charts, graphs, and detailed object reports.
Monitor your organization's history of Teamcenter data sharing using Multi-Site and Briefcase file	See Monitor data exchange transactions to view and analyze your organization's history of Multi-Site and Briefcase transactions using charts, graphs, and detailed object reports.
Configure your organization for sharing Teamcenter data using PLM XML	See the section on how to configure PLM XML.
Populate a Teamcenter environment with data	Refer to the section on bulk loading product data.
Business User	
Import or export Teamcenter data packaged as Briefcase files	Get information on **using Briefcase files**.
Import or export Teamcenter data using the open PLM XML interchange format	See the section on how to **share data using PLM XML**.
Share Teamcenter data with others in your organization using Multi-Site Collaboration	Refer to **the section describing Multi-Site Collaboration**.

Sharing data using Briefcase files

Using Briefcase files

You can collaborate with other sites by sharing objects using Briefcase files. Select the objects to share with the other sites, export the objects to a Briefcase file, and provide that file to the other site. If you use **Briefcase checkout** to allow objects to be updated at another site, the objects can be updated at that site, returned to your site, and checked back in.

For example:

- Share data with Teamcenter supplier sites that are online (connected) or offline (unconnected). Other sites can optionally update the objects and return them to you.
- Share data with Teamcenter sites in your own organization that are not connected (offline).
- Exchange data with organizations that are not using Teamcenter (unmanaged sites).
- Exchange data with Teamcenter sites using different data models than yours.

You can export objects of the types specified with the **Briefcase_export_supported_types** preference. You cannot export objects using Briefcase files in the design context when using Supplier Collaboration.

You can also view and analyze your organization's history of Briefcase transactions using charts, graphs, and detailed object reports. See Monitor data exchange transactions.

Export objects using Briefcase files

You can share objects with other sites by exporting them to Briefcase files and providing the files to the other sites. If you use **Briefcase checkout** to allow objects to be updated at another site, the objects can be updated at that site, returned to your site, and checked back in.

You can export objects of only those types specified with the **Briefcase_export_supported_types** preference.

Export data to a Briefcase file

1. If the target site is intended to modify the exported data, grant modification rights to the target site using either **Briefcase checkout** to grant temporary modification rights (excluding revise rights) or by **transferring ownership of the objects**.

2. Select one or more items or assemblies to be exported to the target site. These selections become separate root items in the exported Briefcase.

3. Select **Share** > **Export to Briefcase** to display the **Export to Briefcase** panel.

4. Specify the export properties on the **Export to Briefcase** panel.

Property	Description
Target	Select **Teamcenter** if you are sharing data with a site managing its data with Teamcenter. Select **Briefcase Browser** if you are sharing data with an unmanaged site. Unmanaged sites can open the Briefcase file with Briefcase Browser.
Target Site	Enter the name of the site to which you are exporting data.
Transfer Option Set	Select the transfer option set to use when exporting the objects. Low-level configured and unconfigured transfer option sets are available when exporting to a Teamcenter target site. High-level configured transfer option sets are available for exporting to a Briefcase Browser target site. The available configured transfer option sets are controlled by the types specified with the **Briefcase_configured_export_supported_types** preference. Depending on the selected transfer option set, you can specify additional options such as **Revision Rule** and **Variant Rule** on the panel and override other options. Update those values as necessary for your export.
Briefcase Name	Accept the default file name or update it as necessary.
Delta Export	Set **Delta Export** to **Yes** to export modified objects tracked by configured incremental change as a partial structure export.
Force Re-Export	Set **Force Re-Export** to **Yes** to repeat the same root object's most recent configured export using the specified values of **Transfer Option Set**, **Revision Rule**, and **Variant Rule**.
Validate	Set **Validate** to **Yes** to specify that the exported data be validated and a summary report generated during export. If you set **Validate** to **Yes**, optionally click **Validate Only** to simulate an export of the data with the current settings. You receive an alert when the report of the simulated export is generated. No Briefcase file is generated. Review the report as described in *Review the export report* later in this topic.

5. Click **Export** to create the Briefcase file. You receive an alert when the export is complete.

   If **Validate** is set to **Yes** and errors that impact data integrity occur during the export, a Briefcase file is not created. Review the validation report as described in *Review the export report* for details.

Review the export report

You receive a report alert when your export or validation run completes. Click on the alert to view the report of the export or validation. All recent alerts are available from the **Subscription** tile.

The **Properties** section of the report includes details such as a list of the objects exported, the target site, transfer option set used, and so on. Under **Related Objects**, click on the export log entry or validation report entry to view additional details.

Transfer the exported Briefcase file

The **Target Object** section of the export report contains a link to the exported Briefcase file. You can preview the Briefcase file and compare it to other Briefcase files from the report.

Download the file and transfer it to the target site by email or other means.

Import objects from Briefcase files

You can import objects packaged in Briefcase files that have been exported from their owning sites to your Teamcenter (managed) site and provided to you. (Unmanaged sites without Teamcenter or Active Workspace can use Briefcase Browser to open and work with Briefcase files.)

Use Briefcase files in the following scenarios:

- You may be a supplier receiving objects from an OEM that you update locally and provide back to the OEM. In this scenario, the objects you are to change have been checked out to your site for modification. Update them and then create a Briefcase file containing the updated files and send it to the OEM.
- Ownership of certain objects is now being handled by your site. The objects have been marked for ownership transfer and are included in a Briefcase file you import to your site.
- Objects you have previously exported to another site have been updated by that site, and they are being returned to you in a Briefcase file.

Before importing objects from Briefcase files, you can preview the file contents and compare the file contents to those in other Briefcase files (such as previously exported Briefcase files).

You cannot import objects using Briefcase files in the design context when using Supplier Collaboration.

Import objects from Briefcase files

1. In Active Workspace, select the **Awb0Element** root business object or the folder into which you wish to import the objects from the Briefcase file.

   If you are importing objects modified that were previously exported to another site, select the object or folder from which the objects were originally exported.

2. Click **New** > **Import from Briefcase** to display the **Import from Briefcase** panel.

3. Use **Choose File** to locate the Briefcase file on your local system.

4. Select the transfer option set to use when importing the file. Override any options as necessary.

5. Set **Validate** to **Yes** to specify that the imported data be validated prior to importing objects.

   If **Validate** is set to **Yes** and errors occur during the validation, a report is generated, but no objects are imported

   A **Validate Only** button becomes available on the panel. Optionally click **Validate Only** to simulate an import of the data with the current settings. You receive an alert when the report of the simulated import is generated. No Briefcase file contents are imported. Review the report as described in *Review the import report* later in this topic.

6. Click **Import** to import the objects from the Briefcase file.

   If **Validate** is set to **Yes** and errors that impact data integrity occur during the import run, the objects from the Briefcase file are not imported.

   You receive an alert when the import run is complete. Review the report as described in *Review the import report*.

7. Review the selected folder for the imported objects.

   If you are a site that has been granted permission to edit objects owned by the owning site, those objects are checked out in the folder.

   If your site owns the objects that were updated at another site, **check in the objects**.

Review the import report

You receive a report alert when your import or validation run completes. Click on the alert to view the report of the import or validation. (All recent alerts are available from the **Subscription** tile.)

Under **Target Object**, download the import log which includes details such as a list of the objects imported, the transfer option set used, and so on.

Under **Related Objects** in the **Properties** section of the report, click on the validation report entry to review the optional validation report.

Check out objects for modification at another site

You can use Briefcase files to check out an object for updating at another site (such as a supplier site). This process is referred to as a Briefcase checkout. Briefcase checkout grants temporary modification rights (excluding revise rights) to the target site. These objects are included in an exported Briefcase file provided to the other site.

Briefcase checkouts help OEMs and suppliers collaborate for the following purposes:

- Adding or modifying datasets at a supplier site.
- Adding or modifying components (**ps occurrences**) at a supplier site.
- Modifying metadata (attribute values) of workspace objects at a supplier site. Modification of non-workspace objects, items, and item revisions is not supported.

Keep these objects checked out as long as you want the remote site to have modification rights. If the Briefcase checkouts are canceled at the owning site, any changes made at the remote site cannot be checked in.

- You can perform Briefcase checkouts only on objects of the types an administrator has specified using the **Briefcase_checkout_supported_types** preference.
- You must have permission to check out and modify an object to perform a Briefcase checkout.
- You cannot check out an object for a site if it is already checked out locally or to another site.
- You cannot check out objects in Briefcase files in the design context when using Supplier Collaboration.

Check out objects using Briefcase Check Out

1. Select one or more objects you want to check out.
2. Select **Edit** > **Briefcase Check Out** to open the **Briefcase Check Out** panel.
3. Chose a target site.

   Check **Teamcenter** if the target site is a managed site using **Teamcenter**. Check **Briefcase Browser** to check out the objects to an unmanaged site.
4. Set **Target Site** to the name of the target site.

   The selected objects can only be updated at the site specified, even when included in a Briefcase file that is supplied to other sites.
5. Click **Check Out** to check out the objects to the target site.

   Objects checked out to a target site are identified with a icon. Hover over it to see the check out status.

Check in objects using Briefcase Check In

After you import a Briefcase file containing objects that were checked out using Briefcase checkout, you can check in the objects to your site.

- You can check in objects in Briefcase files that have been checked out for your site.
- You can check in objects in Briefcase files when you are the user who checked out the objects in the original Briefcase file. An administrator also can check in these objects when another user checked out the objects.
- You cannot check in objects in Briefcase files when in the design context when using Supplier Collaboration.

Select the objects that you want to check in to your site and select **Edit** > **Briefcase Check In**. The objects are checked in.

Cancel a Briefcase checkout

If you used Briefcase checkout to check out an object to a site and need to cancel the checkout, select the object and select **Edit** > **Cancel Briefcase Check Out**.

You can cancel your own Briefcase checkouts, but only an administrator can cancel a Briefcase checkout when another user performed the checkout. When a Briefcase checkout is canceled, any changes made at the other site cannot be checked in.

Transfer ownership of objects to other sites

Before using Briefcase to export objects, you can specify (mark) which objects are to be exported with their ownership transferred to the target site.

Marking objects for ownership transfer before the export improves data exports by letting you:

- Precisely identify which objects will have their ownership transferred
- Verify that the ownership of the objects can be transferred
- Lock those items against ownership transfer from a different session or by a different user in this same session

When you mark an object for ownership transfer, ownership of its entire island of objects is transferred upon export. That is, the principal object and the additional objects on which it depends for its correct functional definition and usage within Active Workspace, including item revisions, are owned by the target site upon export. If you mark an item revision for ownership transfer, the full item is marked for ownership transfer. By transferring ownership of the entire island of objects, the target site can edit the parent object without access issues. Ownership is transferred only for direct child objects of the parent object.

Ownership is transferred after the successful export of all revisions of the object, including revisions not explicitly included in the export. Objects can be marked for ownership transfer when:

- The object is owned by your site and is not be replica object.

- The object is modifiable at the owning site.
- The object is not checked out.
- The object type is specified with the **Briefcase_ownership_transfer_supported_type** preference value.

Ownership transfer is not available in the design context when using Supplier Collaboration.

Mark objects for ownership transfer

1. Select the objects to be marked for ownership transfer.
2. Select **Manage** > **Transfer Ownership** to display the **Transfer Ownership** panel.
3. Select one of the following items.
   - Select **Teamcenter** if you are transferring ownership to a site managing its data with Teamcenter.
   - Select **Briefcase Browser** if you are transferring ownership to an unmanaged site.
4. Set **Target Site** to the name of the site to which you are transferring ownership.
5. Click **Transfer**.

   The objects are marked for ownership transfer. Ownership is transferred when the Briefcase file is exported.

View objects currently marked for ownership transfer

On the owning site, click **View** > **Pending Ownership Transfers**. A list of all objects marked for ownership transfer is displayed. If you have an object selected and marked for ownership transfer, it is highlighted in the list.

Optionally filter the list of items by entering a specific target site. Only those objects with ownership marked for transfer to the specified site are displayed.

Cancel ownership transfer

On the owning site, click **View** > **Pending Ownership Transfers**. A list of all objects marked for ownership transfer is displayed.

Select the items for which you want to cancel ownership transfer and select **Cancel Ownership Transfer**. Ownership is retained at the current site and is not transferred when the Briefcase is exported.

Preview and compare Briefcase files

Preview and compare Briefcase files to quickly inspect their contents before importing the data to your Teamcenter site. You can preview and compare briefcase files with each other or with the data in your Teamcenter database.

Preview a Briefcase file

Click a Briefcase file to inspect the Briefcase file's contents and information such as the file's name, description, owning site, and checkout status.

Briefcase contents can be mapped to different objects and structures upon import. You can preview how the Briefcase contents will appear after the mappings are applied by choosing the transfer option set with the appropriate transformation rules defined. The objects in the Briefcase preview are displayed according to the defined rules.

Compare Briefcase files

1. Choose **View** > **Compare Briefcases** to display the **Compare Briefcases** panel. Specify Briefcase files to compare in any of the following ways:

   - Use any of the Search methods to find the Briefcase files you want to compare and drag the Briefcase files to the **Compare Briefcases** panel.

   - Instead of dragging the Briefcase files, you can click **Add** under **SOURCE** to search for the first Briefcase file to compare. Select the file and click **Add**. Perform the same steps to add a second Briefcase file under **TARGET**.

   - You can copy a Briefcase file in Active Workspace and then click **Paste** in the **Compare Briefcases** panel to specify the Briefcase as the **SOURCE** or **TARGET** Briefcase.

   - You can also select one or more Briefcase files before choosing **View** > **Compare Briefcases**. The Briefcase files are automatically added to the **Compare Briefcases** panel.

2. Briefcase contents can be mapped to different objects and structures upon import. To compare Briefcase contents as they appear after mapping, choose **SOURCE** and **TARGET** transfer option sets that have the appropriate transformation rules defined. The objects in the Briefcases are transformed according to those rules before comparing.

3. Click **Compare**.

   A comparison of the two Briefcases is displayed. Expand and collapse the hierarchy of items to compare them. Color-coded bars identify changed objects in the briefcases:

   - Red identifies items not in the Briefcase or Teamcenter database.

- Green identifies new items.
- Yellow identifies items that are changed.

Compare a Briefcase file to your site's current Teamcenter data

1. Select the source Briefcase file to compare using any of the methods detailed in *Compare Briefcase files* earlier in this section.
2. Select **Current State** in the **TARGET** area of the **Compare Briefcases** panel and click **Compare**.

Comparing Briefcase files using **Current State** is available when using Teamcenter 13.3 or later.

Sharing data using PLM XML

Sharing data using PLM XML

PLM XML is an open standard for exchanging product life cycle information using several supported XML schemas. Data represented in these schemas includes product structure, geometry, visualization, features, application associativity, data ownership, and deltas (changes).

Export and import PLM XML when you need to share Teamcenter data with organizations not using Teamcenter or for use with third-party applications. You can use PLM XML to share Teamcenter objects such as items, datasets, BOMs, forms, and folders. You can also use PLM XML to share system data such as business rules and organization data.

Using transfer mode objects created using PLM XML/TC XML Export Import Administration, you can tightly control the scope, versions, and formats of the data being shared by applying closure (traversal) rules, filter rules, action rules, and property set rules.

Export data as PLM XML

You can export assemblies, subassemblies, and items as PLM XML. The PLM XML, along with any attached CAD (or other) data files, is exported to a *.zip* file for delivery to offline sites.

You can export objects of any type supported by the PLM XML schemas and specified with the **AWC_PLMXML_export_supported_types** preference.

Export the data to a .zip file

1. Select the assembly, subassembly, or items to be exported and click **Share** > **PLM XML Export** to display the **PLM XML Export** panel.
2. Accept the default exported PLM XML file name or update it as necessary.
3. Select the transfer mode containing the rules appropriate for your export.

4. Specify the configuration rules to use when exporting the objects.

   - When you export from a product structure, the configuration rules specified for the entire product structure are used to configure the exported data. To change the configuration of the exported objects, adjust the revision and variant rules selected above the product structure as appropriate.

   - When you export from outside of a product structure (for example, from search results or a folder), specify the rules used to configure the exported data in the **PLM Export** panel as appropriate.

5. (Optional) Specify export languages to export as appropriate.

6. Click **Export** to create the exported PLM XML file. The export begins and you receive an alert when the export is complete.

Review the export report

You receive a report alert when your export completes. Click the alert to view the export report. Access all recent alerts from the **Subscription** tile.

The **Properties** section of the report includes details about the export such as the type of export, export completion status, and transfer mode used. Under **Related Objects**, click on the export log entry to view a detailed list of actions and results from the export.

Transfer the exported .zip file

The **Target Object** section of the export report contains a link to the *.zip* file containing the exported PLM XML. Download the file and transfer it to the target site by email or other means.

Import PLM XML data

You can import objects and assemblies as PLM XML. The PLM XML, along with any attached CAD (or other) data files, is imported from a *.zip* file. This *.zip* file can be one that was previously created by exporting data to PLM XML using Active Workspace. If the *.zip* file was created using the Teamcenter rich client or by another application, ensure that the *.zip* file meets the following criteria:

- The *.plmxml* file in the root of the *.zip* file must have the same base name as the *.zip* file.

- The folder containing dataset files in the *.zip* file must have the same name as the *.zip* file's base name.

Import objects in a PLM XML .zip file

1. In Active Workspace, select the folder into which you wish to import the contents of the *.zip* file.

Be aware that even when the **PLMXML_put_objects_in_newstuff_on_import** preference is set to **TRUE**, the data is still imported into this selected folder and not the **Newstuff** folder. (This result is different than when importing PLM XML using the Teamcenter rich client.)

If the PLM XML was created by an application other than Teamcenter or Active Workspace, be aware of how root objects are imported by Active Workspace:

- Imported root objects are determined by the **traverseRootRefs** value of the **Header** element in the *.zip* file's *.plmxml* file.
- If the *.plmxml* file contains no **traverseRootRefs** value, all of the **WorkspaceObjects** in the *.plmxml* file are treated as root objects.
- When importing a **BOMLine**, its underlying **Item** is treated as the root object.

2. Click **New** > **Import PLM XML** to display the **Import PLM XML** panel.
3. Use **Choose File** to locate the *.zip* file on your local system.
4. Select the transfer mode containing the rules appropriate to use when importing the file.
5. Click **Import** to import the objects in the *.zip* file. The import begins and you receive an alert when the import is complete.

Review the import report and objects

You receive a report alert when your import is complete. Click on the alert to view the report. (Access all recent alerts from the **Subscription** tile.)

Related Objects shows the folder in which the objects were imported, In **Target Object**, view a detailed list of actions and results during the import.

In Active Workspace, open the folder in which the objects were imported and review the imported structure.

Sharing data using Multi-Site Collaboration

What is Multi-Site Collaboration?

Multi-Site Collaboration, an optional feature installed by your administrator, lets you securely share and manage product data across multiple sites in your enterprise.

With Multi-Site Collaboration, primary Teamcenter objects exist at one site (the owning site). You can **publish primary objects**, making them available to other sites in your organization (remote sites) for use. You can then **share these objects for replication at specific remote sites**, choosing options such as transferring ownership with the objects, sharing only certain versions of objects, and sharing BOM structures related to the objects. Remote sites then **receive the objects**, which are stored as object replicas at those sites.

Sharing data using Multi-Site Collaboration delivers several benefits:

Provides access to data across the enterprise

Store, locate, view, and use information from any site within your Multi-Site federation; create references among objects at multiple sites; and build product structures using assemblies and subassemblies from multiple sites.

Ensures data integrity

When an object is initially created and saved, that instance is considered the primary object unless there is a transfer of ownership. Updates between primary objects and replicas are synchronized. Only the primary object can be replicated. You cannot replicate replicas.

Provides data security

To ensure that no unauthorized replicas are created, specific sites are authorized to take transfer of ownership. Tracking information is stored with the primary object if it is transferred.

Supports auditing and tracking

To ensure that there is only one instance of a primary object, only one site can accept transferred ownership. A primary object cannot be deleted until all replicas are deleted. This ensures referential integrity across the Multi-Site federation.

Administrators can view and analyze your organization's history of Multi-Site transactions using charts, graphs, and detailed object reports. See Monitor data exchange transactions.

Publish objects for access from remote sites

Sites in a distributed network must have some reliable way of controlling which data they want to share with the rest of the network. With **Multi-Site Collaboration**, you control this by publishing and unpublishing objects.

- Publishing an object makes that object available to other sites, allowing them to make local replicas of the object. When you publish an object, a publication record is created in the ODS (Object Directory Services) database that can then be read and searched by other Multi-Site Collaboration sites. Until you publish an object, it can only be accessed at the local owning site. Other sites cannot access the object.

  Publish an object by selecting it, clicking **Share** > **Publish**, and checking one or more servers to use for publishing. (If your site uses more than one server, consult with your system administrator for recommendations on the best server to use.) Once published, you can **transfer the object** to remote sites.

- Unpublishing an object reverts an object to be accessible only by the local owning site.

  Unpublish an object by clicking **Share** > **Unpublish** and checking the servers from which the object is to be unpublished. Once unpublished, if the object is still replicated on a remote site, it will be shown with a 🌐. Hover over the 🌐 to see the object's status. A best practice is to remove replicas of unpublished objects from remote sites.

Share objects with other sites using Multi-Site Collaboration

If your organization is using Multi-Site Collaboration, you can share objects from your (local) site with other (remote) sites in your Multi-Site network, creating replica objects at these other sites. When sharing, you can specify how site ownership, object ownership, and other transfer options are handled. Local objects must be published to be shared using Multi-Site Collaboration.

Use the following steps to share objects from your site with a remote site.

1. Locate and select an object from your site to share.

   When you search for items, Active Workspace search results include ItemRevision object types by default. Consider using Advanced Search to locate Item object types.

   To share a specific revision of an object, select the revision on the **History** tab. You can also choose an item from the **Where Used** tab and select a specific revision or all revisions of the object.

2. Click **Share** > **Share with Sites**. The **Share with Sites** pane is displayed listing target sites and several transfer options.

3. From the **Destinations** list, check one or more remote sites to be used as target destinations when transferring the selected object. The **Destination** list filters as you type; type the first few characters of the site's name to display the site you want.

4. For **Option Set**, select the transfer option set to use when sharing objects. The transfer option set defines the configuration rules when transferring data between sites. The available option sets vary depending on your site's configuration.

5. Use the following information to update the remaining settings on the **Share with Sites** pane as necessary. Then, click **Share** to share the selected objects with the destination sites. You receive a notification when the transfer completes.

Transfer site ownership to the destination site

To transfer site ownership of the selected objects to the destination site, click **Transfer Site Ownership**. When you transfer site ownership, all revisions of an item will be shared.

If you transfer an item revision with a sequence, its sequence manager is also transferred.

Siemens Digital Industries Software recommends that you leave **Transfer Site Ownership** unchecked.

Share only modified objects

To share a workspace object only when it has been modified since the last time it was exported to the destination site, click **Modified Only**.

For example, if only the specification dataset was modified, the specification dataset is shared and the remaining items are not. When sharing with multiple destination sites, an object is shared if it has been modified since the last export to any of the selected destination sites.

Share different or additional revisions

When you click **Share** > **Share with Sites** with an item selected, you can share that item or choose to share a specific revision of the item such as the latest revision, latest working revision, latest release revision, and so on. On the **Share with Sites** pane, select the revision of the item to share from the **Revision** list.

When you click **Share** > **Share with Sites** with a specific item revision selected, you can share that revision. Optionally, click **All Revisions** on the **Share with Sites** pane to share all versions of the selected item revision.

Share an item and BOM

When you click **Share** > **Share with Sites** with an item revision selected, you can share that item along with a related configured BOM structure. On the **Share with Sites** pane, check **Include Structure** and select the revision and variant rules defining the appropriate revisions of parts and assemblies in the product structure to share.

If you check **Include Structure** with **All Revisions** selected, the related unconfigured BOM structure is shared.

Share item relations

An item or item revision can be related to data, such as datasets, forms, folders, and other items and item revisions. Relations describe how the other data is associated with the item or item revision.

To share related data, from the **Relations** list on the **Share with Sites** pane, check each object relation to also share with the destination sites.

Change ownership of shared objects

Optionally change the owner of the transferred object once it is transferred to the remote site. Under **OWNER** on the **Share with Sites** pane, click **Replace**, check the new owner, and click **Replace**.

Modify transfer options

Review and adjust the transfer options by clicking **Override Options** on the **Share with Sites** pane.

The available options vary depending on the configuration of the selected transfer option set. You can modify the options available to override by editing the transfer option sets as described in *PLM XML/TC XML Export Import Administration* and by changing the value of the **TransferOptionset** preference.

Receive and update objects from remote sites using Multi-Site Collaboration

Use the following steps to import objects recently shared to your site and to update replica objects at your local site. When updating, you can specify how site ownership, object ownership, and other transfer options are handled.

1. Locate and select one or more replica objects. Replicas on your site are identified with a . Hover over the to see the name of the remote site.

   Objects in a product structure that have not yet been received from their sites will be listed with the name **<REMOTE OBJECT>**.

2. Click **Share** > **Receive from Site**. The **Receive from Site** pane is displayed listing several transfer options.

3. Select the transfer option set to use when receiving the objects. The transfer option set defines the configuration rules when transferring data between sites. The available option sets vary depending on your site's configuration.

4. Use the following information to update the remaining settings on the **Receive from Site** pane as necessary. Then, click **Receive** to update the selected objects at your site. You receive a notification when the update completes.

   To view the updated objects in a product structure, click **Expand** > **Unpack All**.

Transfer site ownership to your site

To transfer site ownership of the selected objects to your site, click **Transfer Site Ownership**. When you transfer site ownership, all revisions of an item will be shared.

If you transfer an item revision with a sequence, its sequence manager is also transferred.

Siemens Digital Industries Software recommends that you leave **Transfer Site Ownership** cleared.

Update only modified objects

To update a workspace object only when it has been modified since the last time it was received, click **Modified Only**.

Update different or additional revisions

When you click **Share** > **Receive from Site** with an item selected, you can update that item or choose to update a specific revision of the item such as the latest revision, latest working revision, and latest release revision. On the **Receive from Site** pane, select the revision of the item to update from the **Revision** list.

When you click **Share** > **Receive from Site** with a specific item revision selected, you can share that revision. Optionally, click **All Revisions** on the **Receive from Site** pane to update all versions of the selected item revision.

Update an item and BOM

When you click **Share** > **Receive from Site** with an item revision selected, you can update that item along with a related configured BOM structure. On the **Share from Site** pane, check **Include Structure** and select the revision and variant rules defining the appropriate revisions of parts and assemblies in the product structure to update.

If you check **Include Structure** with **All Revisions** selected, the related unconfigured BOM structure is updated.

Update item relations

An item or item revision can be related to data, such as datasets, forms, folders, and other items and item revisions. Relations describe how the other data is associated with the item or item revision.

To update related data, from the **Relations** list on the **Receive from Site** pane, check each object relation to also update.

Modify transfer options

Review and adjust the transfer options by clicking **Override Options** on the **Receive from Site** pane.

The available options vary depending on the configuration of the selected transfer option set. You can modify the options available to override by editing the transfer option sets as described in *PLM XML/TC XML Export Import Administration* and by changing the value of the **TransferOptionset** preference.

Check out and check in objects when using Multi-Site Collaboration

When using **Multi-Site Collaboration**, Siemens Digital Industries Software recommends you check out and modify only master objects. The check-out and check-in of objects managed with Multi-Site Collaboration is **the same as in the case of other objects**.

If necessary, you can also check out and modify replica objects (identified with a) on other sites in your Multi-Site federation. When checking out and checking in replica objects, be aware of the following items:

- When you check out and check in a remote item, certain related objects such as item revisions and datasets are also checked out and checked in. The list of related items checked out and checked in is determined by the values specified in the **MultiSiteCICORule** closure rulethe **MultiSiteCICORule** closure rule.
- You cannot directly check out and check in remote objects from Structure Manager. Check the remote objects in and out from outside of the product structure. For example, select the object in the product structure, click the **History** tab, select the object, and click **Edit** > **Check Out**.
- When a replica object is checked out at a remote site, the object cannot be checked out at the master site.
- When you check in replica objects, the updated data is sent to the master site. Doing so ensures consistent data across your organization.
- When you check in a modified structure, you are prompted whether to check in the entire structure and whether to retain ownership of the components at the master site.

When checking in replica objects, you have the following options:

Check in an item revision and BOM

Check **Include Structure** to check in the item revision and any other new or changed components in the related configured BOM structure.

Retain object ownership of new components

To keep site ownership local for any newly created objects being checked in, click **Retain Ownership of Components**. If not, ownership of the newly created objects is transferred to the primary site upon checkin.

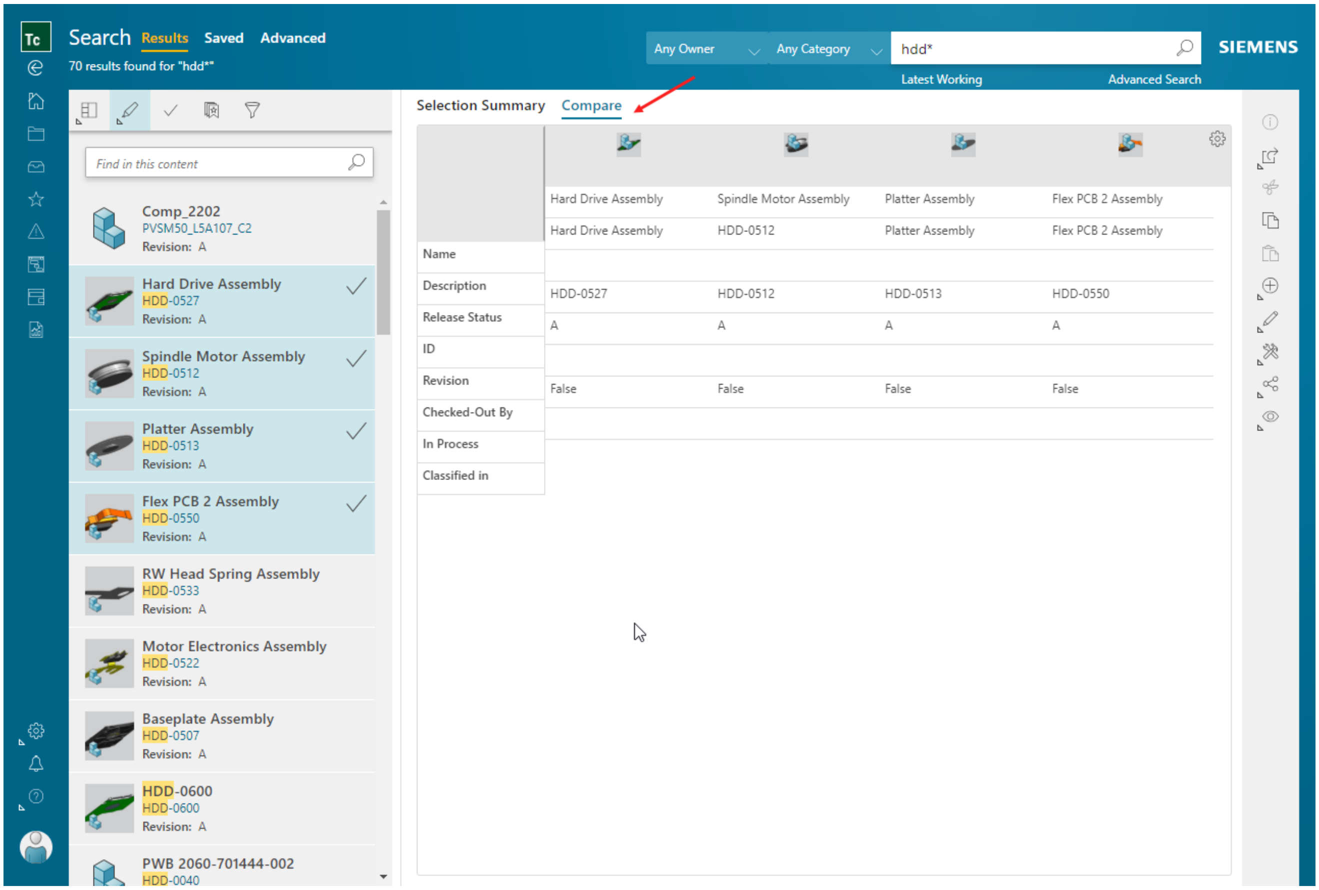
Check in data linked to the object using relations

To check in changes to related data, such as datasets, forms, folders, and other items and item revisions, from the **Relations** list, select each object relation to also check in at the remote site.

Comparing object properties

You can compare common properties of objects.

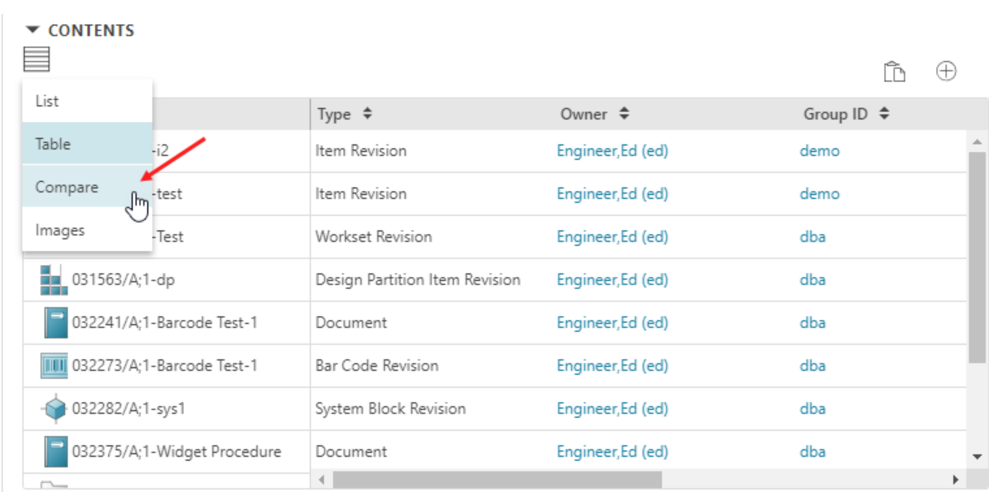
- To compare multiple selected objects from a list, click the **Compare** tab.



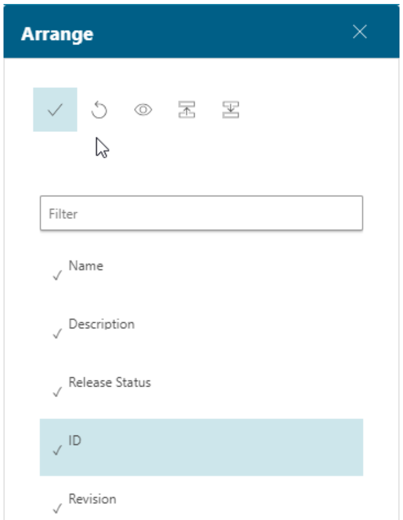
Note:

While in a comparison display from a list, you can use the list to select additional objects or remove objects.

- To compare objects in a table, select **Compare** from the display menu.



- To arrange properties in a comparison display, click ⚙ to the right of the column headings and choose **Arrange** to display the **Arrange** panel.



Note:

The columns available for display in Active Workspace are specified by administrators.

When you navigate away from a comparison display, changes made using the **Arrange** panel are not retained.

Alternately, to change the column order for closer comparison to another column, click and hold in the header row, and then drag the column to the desired location.

Note:

While in a comparison display, you can select a column and click **Information** ⓘ to display the object panel to edit properties for that object, or use any other available command and complete the desired action.

Tracking changes to objects

As an object goes through the change process, the changes (additions, modifications, revisions, deletions, and replacements) can be tracked to make it easier for you to see what properties of the object were modified as part of the requested change. You can view these changes by clicking **View** > **Show Redlines** on the object.

Note:

The changes are highlighted only if your site administrator has set the **AWC_Enable_RedLine_feature** preference to **TRUE**.

When you show redlines, changes are displayed on the object using the following highlighting methods:

- Deleted parts are highlighted with a red strikethrough.
- Added parts are highlighted with a green italic font.
- For replaced or revised parts, old and new values are shown side by side.

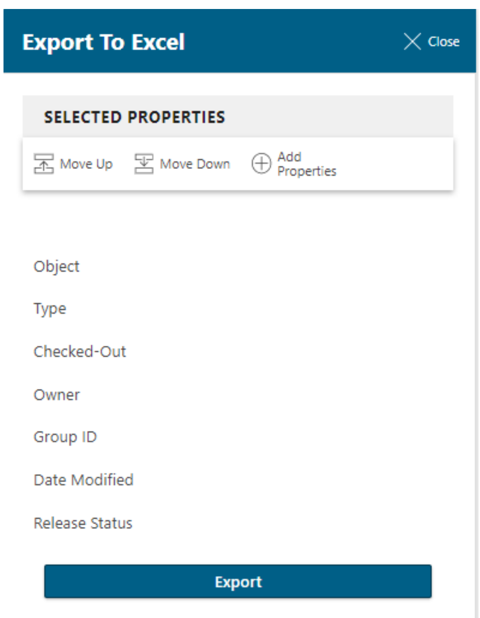
For more information on tracking changes, in the *Change Management* help, see *Review active or closed changes for a structure*.

Exporting tables to Microsoft Excel

You can quickly export data from tables to Microsoft Excel so the data can be shared with others that may not have access to it in Active Workspace.

1. On the table you want to export, click **Export to Excel**.

   The **Export to Excel** panel opens. The table columns are automatically added to the export and are displayed in the same order as the table.

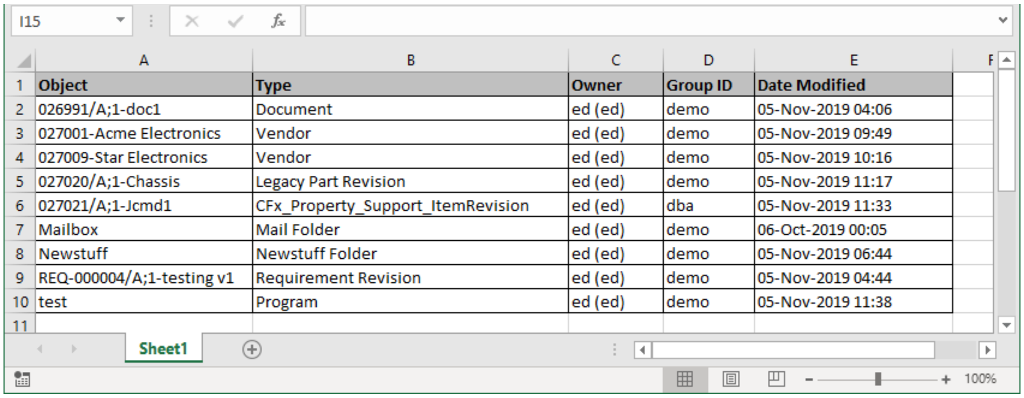
   

2. Do any of the following:

   - To rearrange the order of the table columns prior to export, select the column you want to move and then click **Move up** or **Move Down** to change the order.
   - To remove a column, select it and then click **Delete**.

- To view a list of all the columns for the table, click **Add Properties**. Columns that are selected for export are checked. Any columns deleted from the export or hidden in Active Workspace are unchecked. You can restore a hidden or deleted column by selecting it and then clicking **Add**.

3. Click **Export**. Active Workspace automatically generates a file name and downloads the Excel spreadsheet.



Object	Type	Owner	Group ID	Date Modified
026991/A;1-doc1	Document	ed (ed)	demo	05-Nov-2019 04:06
027001-Acme Electronics	Vendor	ed (ed)	demo	05-Nov-2019 09:49
027009-Star Electronics	Vendor	ed (ed)	demo	05-Nov-2019 10:16
027020/A;1-Chassis	Legacy Part Revision	ed (ed)	demo	05-Nov-2019 11:17
027021/A;1-Jcmd1	CFx_Property_Support_ItemRevision	ed (ed)	dba	05-Nov-2019 11:33
Mailbox	Mail Folder	ed (ed)	demo	06-Oct-2019 00:05
Newstuff	Newstuff Folder	ed (ed)	demo	05-Nov-2019 06:44
REQ-000004/A;1-testing v1	Requirement Revision	ed (ed)	demo	05-Nov-2019 04:44
test	Program	ed (ed)	demo	05-Nov-2019 11:38

Note:

If your browser is set to ask you where to save files before downloading, you can change the automatically generated file name and save location of the Excel file before downloading it.

Synchronize workflow tasks in Outlook

Synchronize your Teamcenter workflow tasks in Microsoft Outlook so that both your Outlook tasks and Teamcenter workflow tasks appear in the Outlook task list. This is an easy way to view all your work tasks displayed in a single list. Open a Teamcenter workflow task to complete the task (or reassign the task) using Active Workspace.

1. In Outlook, click **Tasks**.

2. In the **Teamcenter** tab, click **Synchronize Tasks** .

3. To review your Active Workspace **Inbox** in Outlook, click a Teamcenter task.

4. Alternatively, to open Active Workspace in an Outlook window:

   a. Double-click a Teamcenter task.

   b. Click the Teamcenter tab.

   c. Select **Perform Task** on the Teamcenter tab to display the Active Workspace **Inbox** in a task panel.

5. Complete the task using Active Workspace.

Generating and viewing reports

Generate and view predefined reports

Generating reports

You can use Teamcenter predefined reports to generate various types of item, summary, and custom reports.

Summary and item reports are static reports. They are generated from the persistent properties in a database. Custom reports are dynamic reports and are generated from the runtime properties in a database.

- *Item report*: These are generated in the context of a specific object, for example, reports that show the BOM list for an item or the workflow sign-off for an item.

- *Summary report*: These reports collate and summarize similar information, for example, reports that show entries for all the employees, the items belonging to a user, or the release status of items. These are generated from Teamcenter saved queries and you need not have to select any objects to run these reports.

- *Custom report*: These reports address special cases such as complex processing or calculations done through custom code or API functions, or when the data comes from external sources. For example, the *reports administrator* can create a custom report that generates and displays the BOM line attributes of a product structure. The BOM line information in the report you generate can change depending on the type of revision rule applied before generating this report.

Generating reports using Reporting and Analytics

If Reporting and Analytics is installed and deployed in your Teamcenter environment, you can:

- Define and create new Reporting and Analytics reports.

- Edit reports, charts, and layouts without launching a separate application.

- Configure charts with customized styles, dimensions, and measures.

Generate an item, summary, or a custom report

You can generate an **item report**, **summary report or a custom report**, or **Reporting and Analytics reports**.

Generate an item report

1. Search for an item and select the item revision.

2. Click **New** > **Generate Report**.

3. Select a predefined report.

4. Specify the appropriate criteria or make the appropriate selections.

5. Select a style sheet.

   You can select a style sheet with an **_html** or an **_excel** suffix to generate the report in HTML or MS Excel format, respectively.

6. (Optional) To save a report, specify a file name in the **Save to File Name** box.

   You can view this report later from the **My Reports** or the **Printouts** tab.

7. (Optional) To generate the report asynchronously, select the **Run in Background** check box.

   By default, this check box is selected if the reports administrator has enabled the **Run in Async** check box while defining a report.

8. To create the report, click **Generate**.

9. To access your saved or asynchronously generated reports, click the **PRINTOUTS** tile on the home page.

   The reports are available from the **Printouts** tab.

   Some reports can be generated only asynchronously. This depends on how the administrator configures the report template at your site. Asynchronously generated reports are available from the **Printouts** tab.

Generate a summary report or a custom report

Currently, there is no command to select a summary or custom report specifically. When you select a report from the **Templates** tab, the **Overview** tab displays the properties of the report including the name and the description. **Type: 0** indicates a summary report and **Type: 2**, a custom report.

1. On the **HOME** page, click the **REPORTS** tile.

2. Click the **Templates** tab, select a summary or custom report, and click **Open**.

Alternatively, click the **Templates** tab, select a summary or custom report, and click **New** > **Generate Report**.

3. To quickly access a summary or custom report, click **Search**, for example, *change*. Then, select the report and click **Open**.

4. For summary reports, specify the appropriate criteria or make the appropriate selections in **REPORT FILTERS**.

5. Select a style sheet.

   You can select a style sheet with an **_html** or an **_excel** suffix to generate the report in HTML or MS Excel format, respectively.

6. (Optional) To save a report, specify a file name in the **Save to File Name** box.

   You can view this report later from the **My Reports** or the **Printouts** tab.

7. (Optional) To generate the report asynchronously, select the **Run in Background** check box.

   By default, this check box is selected if the reports administrator has enabled the **Run in Async** check box while defining a report.

8. To create the report, click **Generate**.

9. To access your saved or asynchronously generated reports, click the **PRINTOUTS** tile on the home page.

   The reports are available from the **Printouts** tab.

   Some reports can be generated only asynchronously. This depends on how the administrator configures the report template at your site. Asynchronously generated reports are available from the **Printouts** tab.

Generate Reporting and Analytics reports

If Reporting and Analytics is installed and deployed, you can generate a new report or view a snapshot. A *snapshot* is a report that contains layout information and query results retrieved at a specific point in time. Snapshots are automatically created based on a schedule and saved to a location or server. You can analyze multiple snapshots, captured on previous occasions, to help identify trends based on historical data.

> Note:
>
> Reporting and Analytics is not supported for custom reports.

1. Click **New** to generate a new report, specify filter criteria, and click **Run** to generate the report.

   OR

   Click **Add to Queue** to add the report to the queue to generate the report in the background. You receive an email with the link to the report after successful completion. The generated report is also available in the **Snapshots** area.

2. (Optional) To edit a Reporting and Analytics report, open the report, click **Settings** and then click **Edit** on the toolbar.

3. (Optional) Add new widgets, styles, dimensions, and measures to the report.

4. Click **Save** to save your changes.

5. (Optional) To export the report as an email, PDF, HTML, Excel, PowerPoint, or a text file, click **Settings** and select the format to which you want to export.

Generate active reports

Generating active reports

You can create report definitions for active summary reports and active item reports dynamically and add them to the database. The report definition identifies the content you want to include in the report. You can select a layout for the report and add charts and a table. After previewing and saving a report, you can search for and rerun this saved report to fetch the latest data from the database.

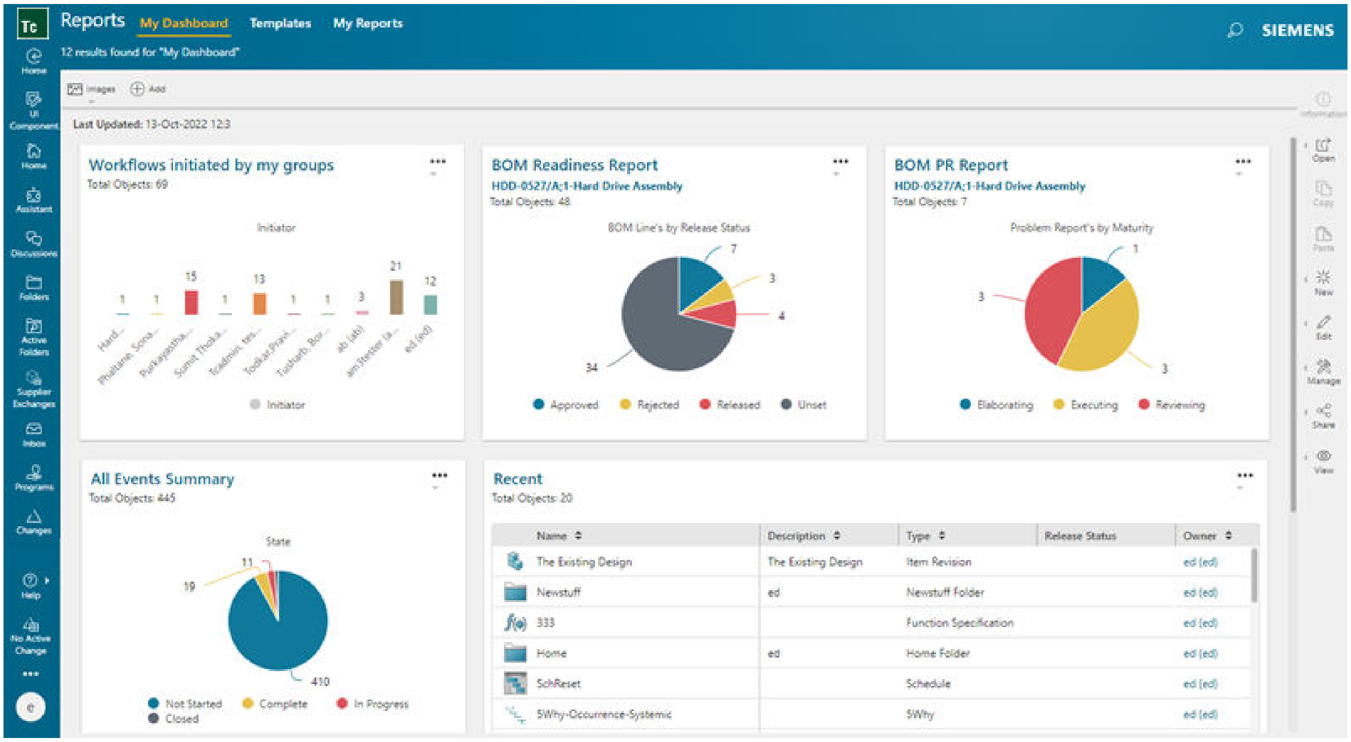
- *Active summary reports* collate and summarize similar information, for example, reports that show entries for all the employees, the items belonging to a user, or the items released in the current month.

- *Active item reports* are generated in the context of a specific object, for example, reports that show all solution items for a selected **Change Revision** or all attachments for a selected **Item Revision**.

Some business objects such as programs do not have the **Reports** tab enabled by default. In such cases, you cannot view the **Active item report**. The reports administrator or a user with DBA privileges can modify style sheets to enable this tab. For more information, see *Report Builder* on Support Center.

View My Dashboard reports

My Dashboard is a personalized list of your favorite reports. It contains both Active Summary reports and Reporting and Analytics reports (if installed and deployed).

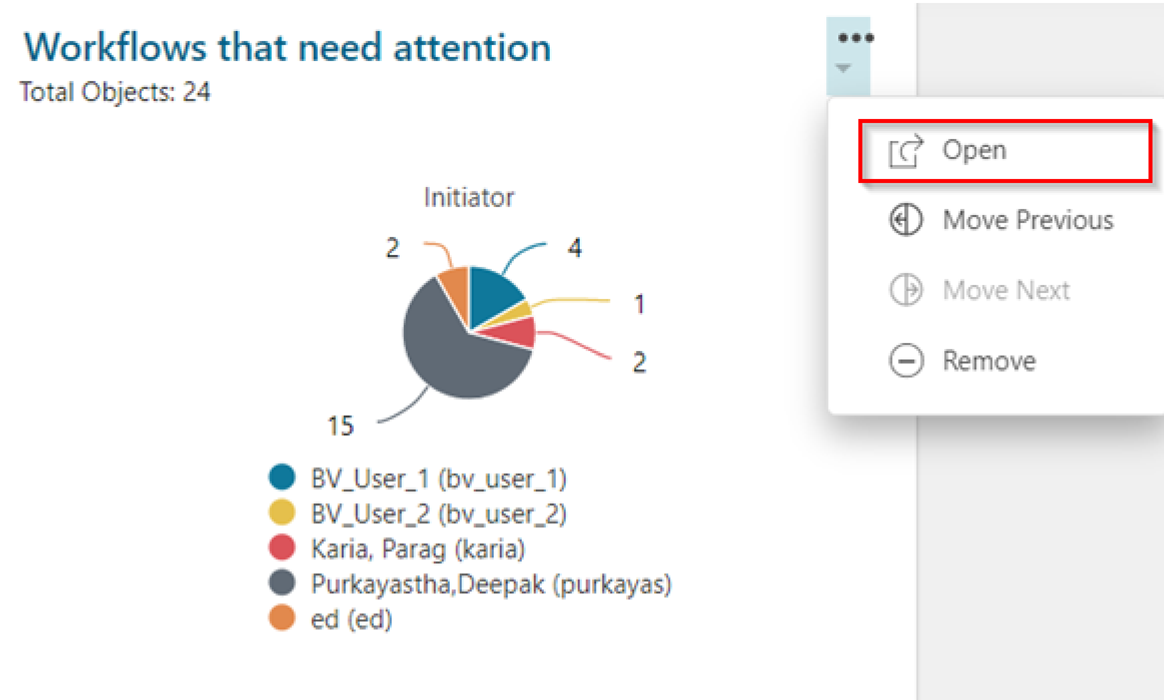


1. On the **Home** page, click the **Reports** tile.

   By default, the available reports are displayed as thumbnails in **My Dashboard**.

2. To open the report, hover over the report title until a link appears, and click the title link to open it.

   Alternatively, select the report tile, click **More Commands**, and choose **Open**.

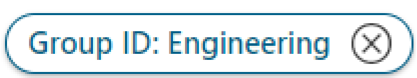


3. Drill down the report to find specific data.

   Example:

   a. Open the **My Modified Objects** report.

   b. In the **Objects By my Login Group** pie chart, click the area specific to a group, for example, the **Engineering** group. The chart and the table area show objects specific to the **Engineering** group. Click the following button to close this view.

   c. In the **Objects by Type** area, click the **Item Revision** line chart. The **Item Revision** chart area shows the **Objects By my Login Group** pie chart specific to item revisions.

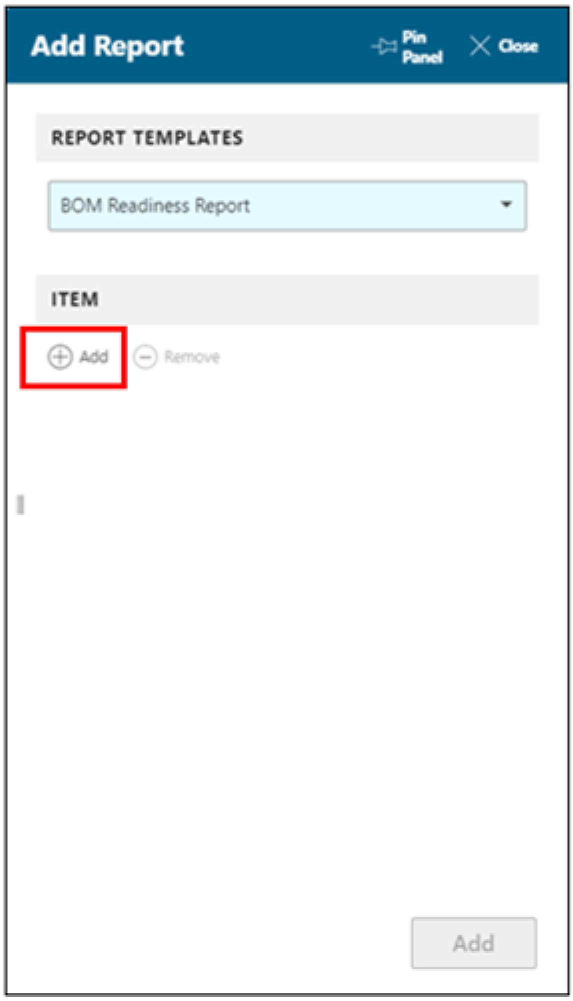
      The table shows the item revisions by name, ID, group ID, and the last modifying user. If the objects have a release status, the **Object by Release** pie chart displays how many objects are unassigned or released.

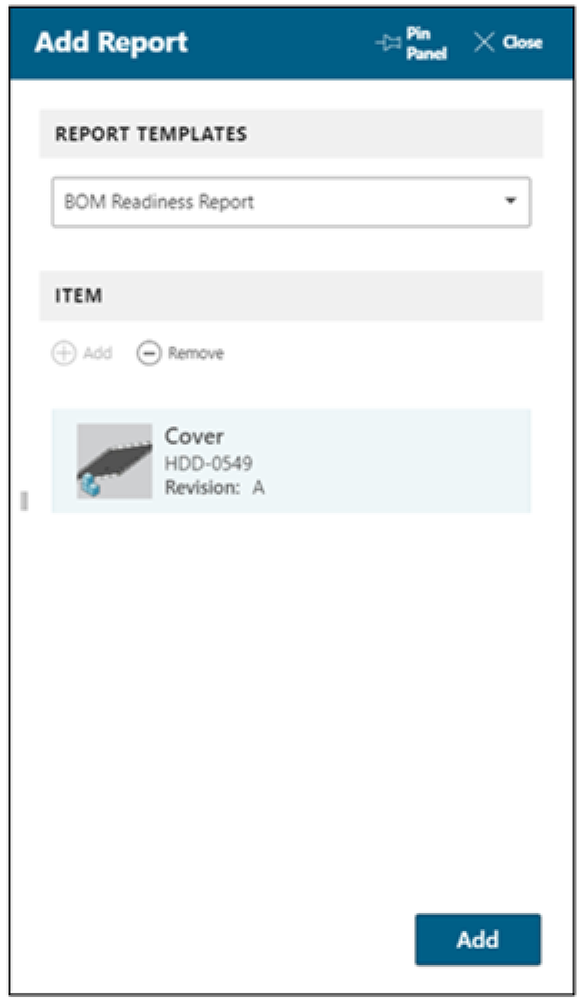
4. (Optional) Open the report and if the report contains data in a tabular format at the bottom, click the table header of the column you want to sort and choose the appropriate option. You can also select an operator for further filtering. The valid operators are **Contains**, **Does not contain**, **Begins with**, **Ends with**, **Equals**, and **Does not equal**. For example, for a BOM readiness report, you can select **Contains** and type **released** to find the released item revisions.

5. (Optional) To remove the report from **My Dashboard**, select the report tile, click **More Commands**, and choose **Remove**.

6. To add a report from **Templates**, click **Add** ⊕ on the top left side above the report tiles, search for the report in the **Add Report** panel, select it, and click the **Add** button.

   If you select an active item report, you must specify the item related to this report. To do so, click the **Add** button in the **ITEM** area of the **Add Report** panel, search for the item, select it, and click the **Add** button.





7. Display the table tile on **My Dashboard**.

   You can optionally display the table tile on **My Dashboard** for an existing summary or item report.

   You can open an object or sort, hide, or freeze columns directly from the table tile. Additionally, you can select multiple objects from the table tile, copy them, or add them to **My Changes**, or perform some other similar action.

a. In **Templates**, select the report for which you want to display the table tile on **My Dashboard**.

b. From the primary toolbar, click **Edit** > **Edit Report** and select **Set Layout**.

c. In **Table**, if you have not selected columns, select them as appropriate and select **Set as Thumbnail**.

   In reports, you can set one of the three charts or the table as the thumbnail.

d. Click **Save** and navigate to **My Dashboard** by selecting **Home** > **Reports**.

   The report you modified displays the table tile.

Duplicate an existing template and modify it to create a new report

Only the owner of the templates can edit them. However, other users can duplicate existing templates and modify them to create new reports.

1. On the **Home** page, click the **REPORTS** tile.

2. Choose the **Templates** tab, search for the template you want to duplicate, and select it.

3. To duplicate the template, from the primary toolbar, select **New** > **Save As** .

4. Change the name, description, and ID as appropriate, and click the **Save** button.

   You cannot edit default report templates containing custom data providers such as **Workflows initiated by my groups**.

5. Search and open the template you duplicated.

6. From the primary toolbar, select **Edit** > **Edit Template** .

7. Make the required changes and save the template.

Share templates across users, roles, groups, and projects

You can share the templates you create across roles, groups, and projects.

When you create a template, it is not available by default for other users to use. You must share the templates you create across users, roles, groups, and projects. The templates you share are available in the **Templates** tab and the **Generate Report** panel.

Procedure

1. On the **Home** page, click the **Reports** tile, and choose **Templates**.

2. Search for the template you have created, select it, and from the primary toolbar, select **Share** > **Share**.

3. To share this template with all users, choose **All users (Public)**.

4. Share this template with selected users.

   You can share templates with selected users, roles, or groups in the organization, or across projects.

   a. To share this template with selected users, choose **Selected users only**.

   b. From the **Available** section, select **Organization** or **Projects** as appropriate.

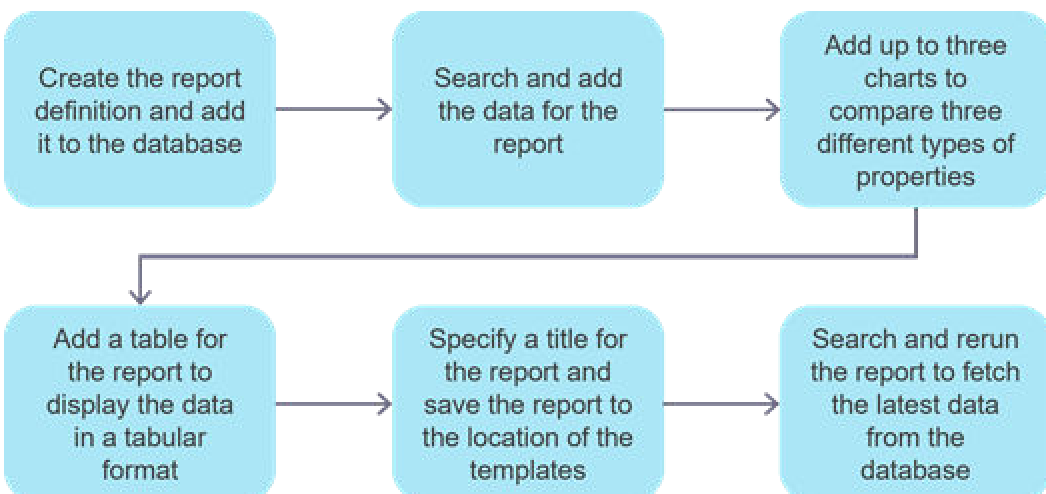
   c. Make the appropriate selections from **Available** and click > to move them to **Shared With**.

5. To share the template, click **Save**.

Create and generate an active summary report

You can create summary reports to collate and summarize similar information, for example, reports that show entries for all the employees, the items belonging to a user, or the release status of items.

The process for creating and generating an active summary report is as follows:



Example:

Create a report for all business objects created by the current logged-on user for the current month. This is a generic report and it can be used by another user to view the business objects created by that user.

Procedure

1. (Optional) Create the report definition and add the data for the report.

    a. On the **HOME** page, click the **REPORTS** tile.

    b. In **My Dashboard** or **Templates**, click **New** > **Create Report**.

    c. To create a summary report, select **Active summary report**.

    d. Search for the data you want in the report.

    In this example, a report is created for all business objects created by the current logged-on user for the current month.

    A. In the **Search Data** panel, search for the data you want to include in the report.

    For example, type **Owner:$ME** and click **Search** to fetch all the objects owned by the currently logged-on user. The keyword for this is **$ME**.

    To further filter your search criteria, for example, to fetch all objects created this month, modify the query as **Owner:$ME AND "Creation Date":$THIS_MONTH** and click **Search**.

    Search criteria examples:

All item revision objects created in the last seven, fourteen, or thirty days	• **ItemRevision AND "Date Modified":$LAST_7_DAYS** • **ItemRevision AND "Date Modified":$LAST_14_DAYS** • **ItemRevision AND "Date Modified":$LAST_30_DAYS**
All item revision objects created in the current or last one year	• **ItemRevision AND "Date Modified":$THIS_YEAR** • **ItemRevision AND "Date Modified":$LAST_YEAR**
All objects created by the logged-on user in this month or last one month	• **Owner:$ME AND "Date Modified":$THIS_MONTH** • **Owner:$ME AND "Date Modified":$LAST_MONTH**
All released objects in the last three months	**"Release Status":* AND "Date Released":$LAST_3_MONTHS**

Dashboard for objects modified by the logged-on user in the current year	**"Last Modifying User":$ME AND "Group ID":$MY_GROUP AND "Date Modified":$THIS_YEAR**
All change requests, change notices, or problem reports created in the current year	**ChangeRequestRevision AND "Creation Date":$THIS_YEAR** OR **ChangeNoticeRevision AND "Creation Date":$THIS_YEAR** OR **ProblemReportRevision AND "Creation Date":$THIS_YEAR**

B. To include the data in the report, click **Save**.

2. Select a layout for the report and add charts

   You must first create the report definition and add the data for the report before you can select a layout and add charts and a table.

   a. Specify a report title.

   b. Specify the number of charts you want to add for this report by selecting the appropriate option.

   c. Select **Bar Chart**, **Pie Chart**, or **Line Chart** for the type of chart you want to create.

   d. To create a layout for the report, click **Edit**.

   e. To add a property for the chart, from the **Chart On** list, select a value, for example, **Status**.

   f. Specify a title for the chart type or accept the default title.

   g. To save this chart type, click **Save**.

   h. To add the second and third charts, repeat the above steps. You can choose other properties for the second and the third chart, for example, **State** and **Priority**, respectively.

      To use additional **Chart On** properties, use the **REPORT_AW_ItemReport_Objects_FilterProperties** preference.

      You can work with all Teamcenter preferences from within the Active Workspace client by using the **Preferences** page.

For information about retrieving a list of preferences, see Where can I get a list of preferences? in *Active Workspace Administration* on Support Center.

i. After creating more than one chart, to move the chart, click **... More Commands** and select the appropriate option.

3. To display the data in a tabular format, add a table for the report.

   a. In the **TABLE** area, click **Table Settings** > **Arrange**.

   b. From **Available Columns**, select column name properties such as **Object**, **Task Type**, **Description**, **State**, and **Status**, and click 〉 to move them to **Displayed Columns**.

   c. (Optional) To rearrange the columns in the table, in the **Column Name** area, select a column name, click the column widget, and move the column up or down.

   d. To save the column arrangement, click **Arrange**.

   e. (Optional) To add additional columns to the table, use the **REPORT_AW_ObjectType_Properties** preference.

4. Save the report as a template.

   a. To save the report as a template, click **Save as Template**.

   b. (Mandatory) Specify a name for the report.

   c. (Optional) Include a description.

   d. (Optional) To include the report in **My Dashboard**, select the **Add to Dashboard** check box.

   e. Click **Save**.

5. Edit the report from **Templates**.

   a. Navigate to the **Templates** location.

   b. Search for the report definition you want to edit, select it, and click **Edit** > **Edit Report**.

   c. Make the necessary changes and save the report.

6. Generate the report.

   a. In **Templates**, select the report you want to generate.

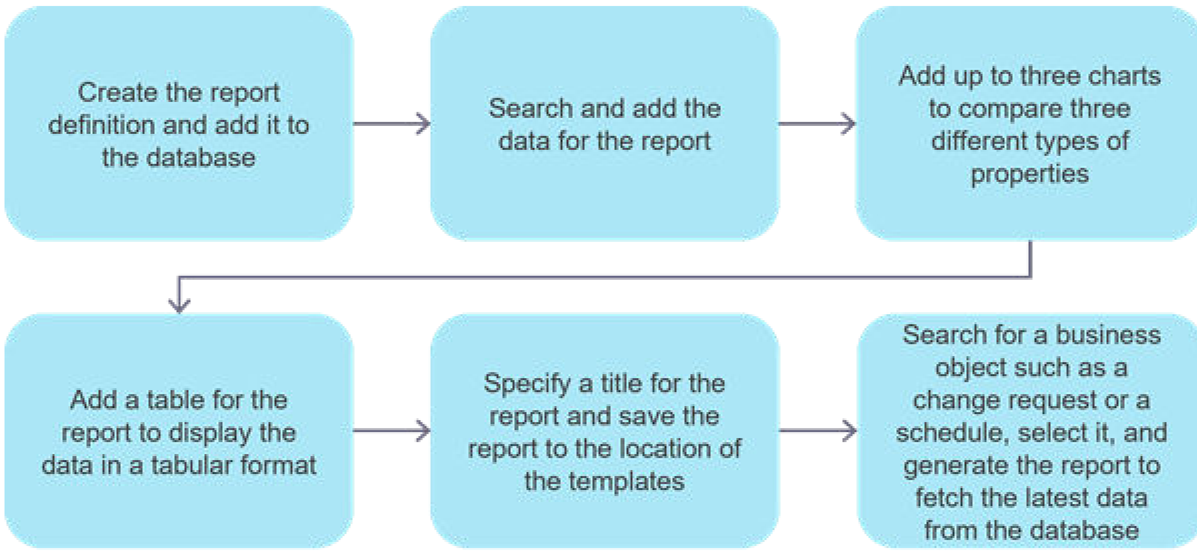
   b. To generate the report, click open.

The report is generated by fetching the latest data from the database.

Create an active item report for schedule tasks

You can create an active item report for schedule tasks.

The process for creating and generating an active item report is as follows:



Procedure

1. (Optional) Create the sample data for schedule tasks.

   The following procedures are optional. These tasks have a schedule object as the parent in this example. At your site, you can search for the appropriate object to add as the sample source to validate the related data.

   a. On the **HOME** page, click the **Schedules** tile.

   b. From the primary toolbar, click **New** > **Create Schedule** > **Schedule** and specify the name as **Test_Schedule**.

   c. Specify information as appropriate and click **Create**.

   d. Open the schedule you created, click the **Tasks** tab, click **Add Schedule Task** and select **Schedule Task**.

   e. Specify the name, add other information as appropriate, and click **Add**.

2. Create the report definition and add the data for the report.

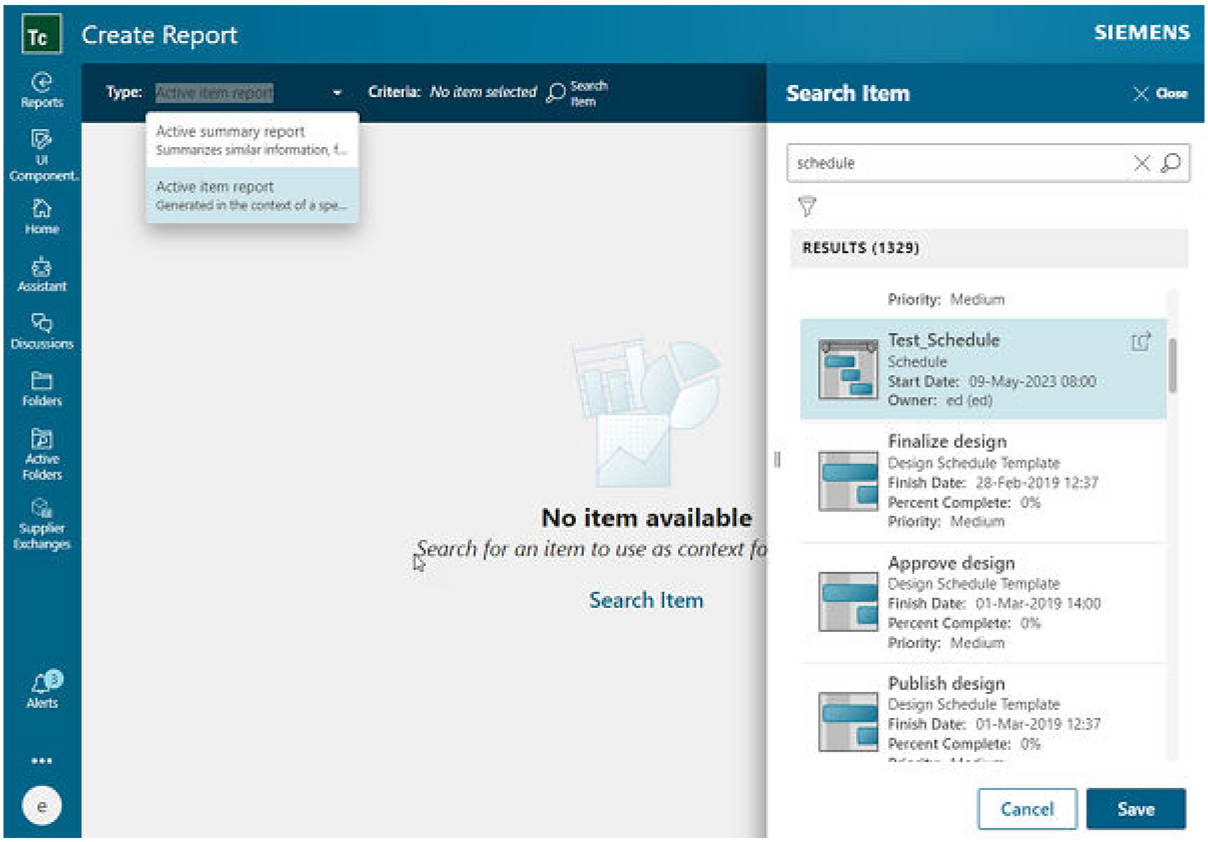
a. On the **HOME** page, click the **REPORTS** tile.

b. In **My Dashboard** or **Templates**, click **New** > **Create Report**.

c. To create an item report, select **Active item report**.

3. Search for the data you want to include in the report.

a. To search for the item you want to include in the report, type, for example, *schedule* to search for a schedule in the **Search Item** panel, select it, and click **Save**.

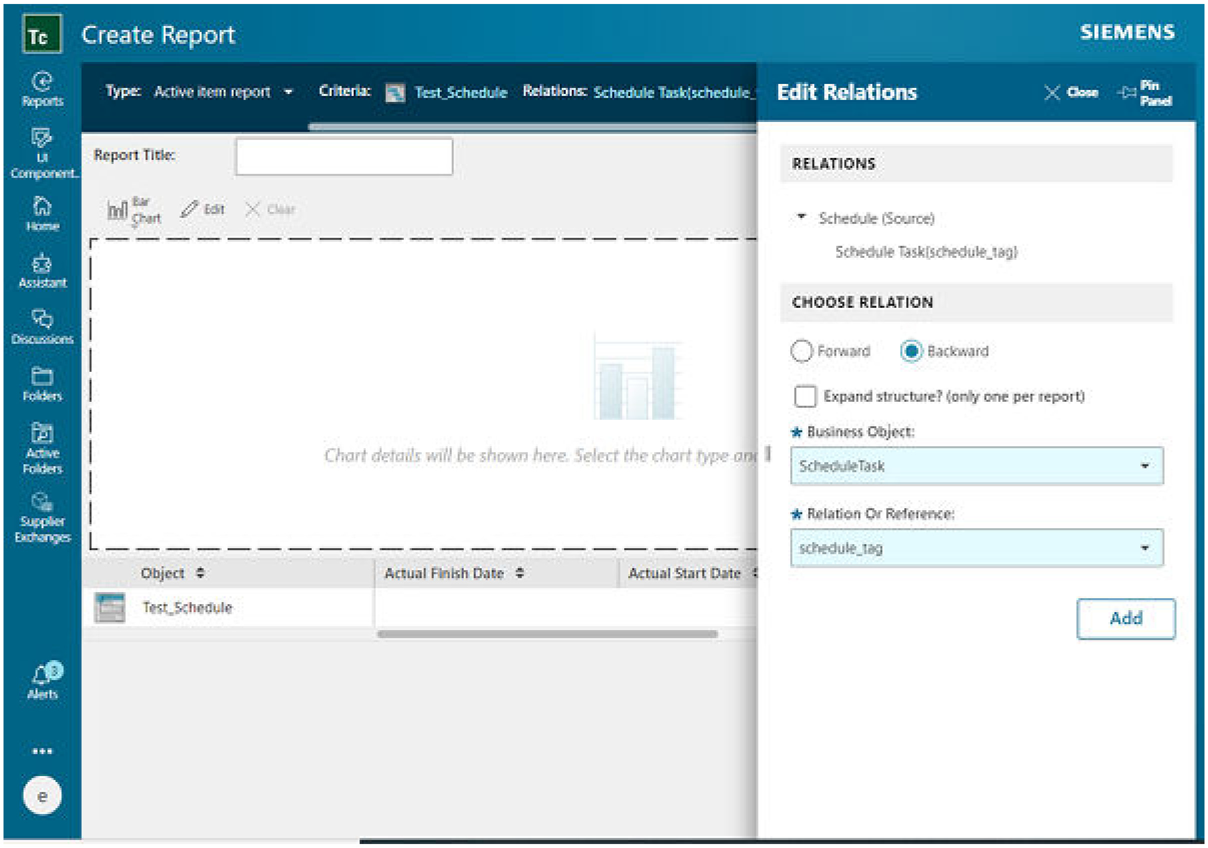


b. To add relations, click **Add Relations**.

c. Specify information as appropriate.

Example:

- Traversal direction: **Backward**
- **Business Object: ScheduleTask**
- **Relation or Reference**: **schedule_tag**



d. To add the relations, click **Add**.

4. Select a layout for the report and add charts

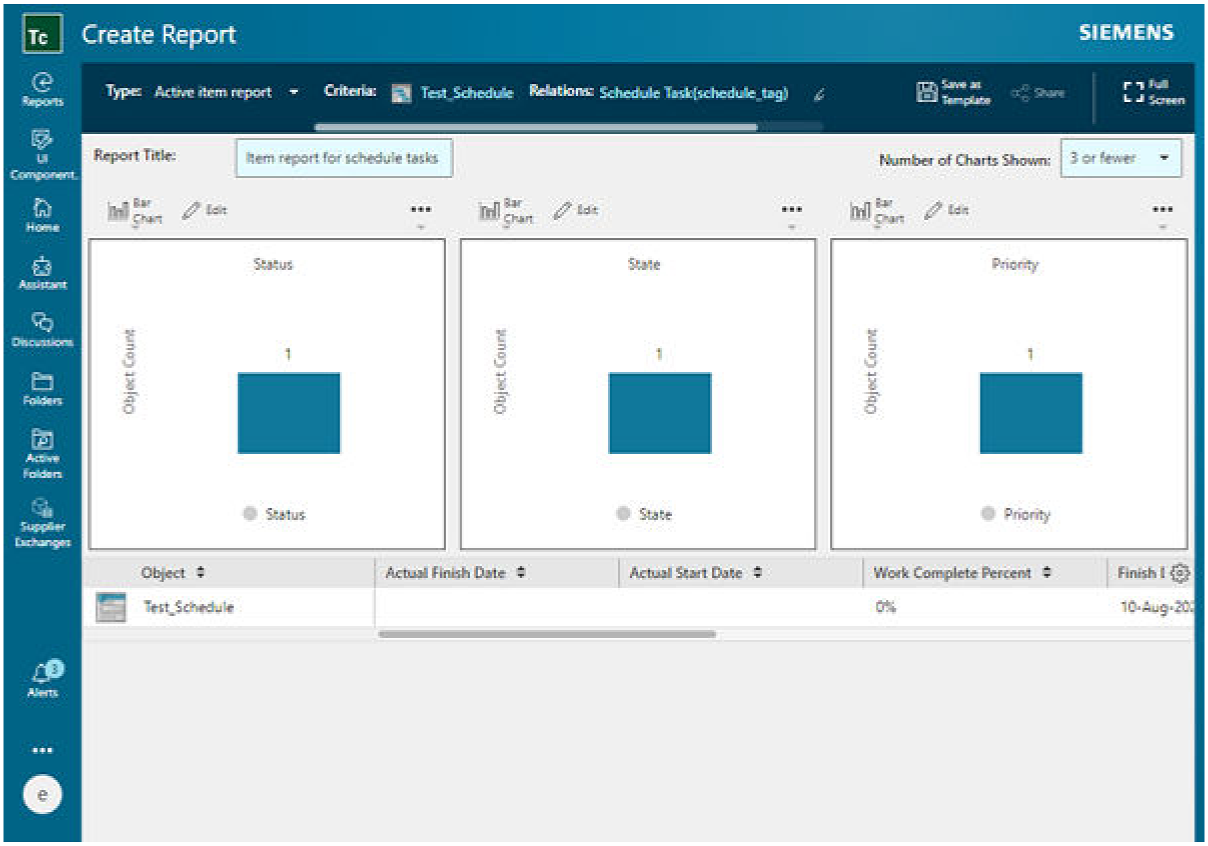
   You must first create the report definition and add the data for the report before you can select a layout and add charts and a table.

   a. Specify a report title.

   b. Specify the number of charts you want to add for this report by selecting the appropriate option.

   c. Select **Bar Chart**, **Pie Chart**, or **Line Chart** for the type of chart you want to create.

   d. To create a layout for the report, click **Edit**.



e. To add a property for the chart, from the **Chart On** list, select a value, for example, **Status**.

f. Specify a title for the chart type or accept the default title.

g. To save this chart type, click **Save**.

h. To add the second and third charts, repeat the above steps. You can choose other properties for the second and the third chart, for example, **State** and **Priority**, respectively.

   To use additional **Chart On** properties, use the **REPORT_AW_ItemReport_Objects_FilterProperties** preference.

   You can work with all Teamcenter preferences from within the Active Workspace client by using the **Preferences** page.

   For information about retrieving a list of preferences, see Where can I get a list of preferences? in *Active Workspace Administration* on Support Center.

i. After creating more than one chart, to move the chart, click **... More Commands** and select the appropriate option.

5. To display the data in a tabular format, add a table for the report.

a. In the **TABLE** area, click **Table Settings** > **Arrange**.

b. From **Available Columns**, select column name properties such as **Object**, **Task Type**, **Description**, **State**, and **Status**, and click > to move them to **Displayed Columns**.

c. (Optional) To rearrange the columns in the table, in the **Column Name** area, select a column name, click the column widget, and move the column up or down.

d. To save the column arrangement, click **Arrange**.

e. (Optional) To add additional columns to the table, use the **REPORT_AW_ObjectType_Properties** preference.

6. Save the report as a template.

   a. To save the report as a template, click **Save as Template**.

   b. (Mandatory) Specify a name for the report.

   c. (Optional) Include a description.

   d. Click **Save**.

7. Edit the report from **Templates**.

   a. Navigate to the **Templates** location.

   b. Search for the report definition you want to edit, select it, and click **Edit** > **Edit Report**.

   c. Make the necessary changes and save the report.

8. Generate the report.

   a. Search for the schedule for which you want to generate the report.

   b. Select the program, and click **New** > **Generate Report**.

   c. Select the report you created and click **Generate**.

      The report is generated by fetching the latest data from the database.

   d. (Optional) Create another schedule task.

      A. Open the schedule you created, click the **Tasks** tab, click **Add Schedule Task**, and select **Schedule Task**.

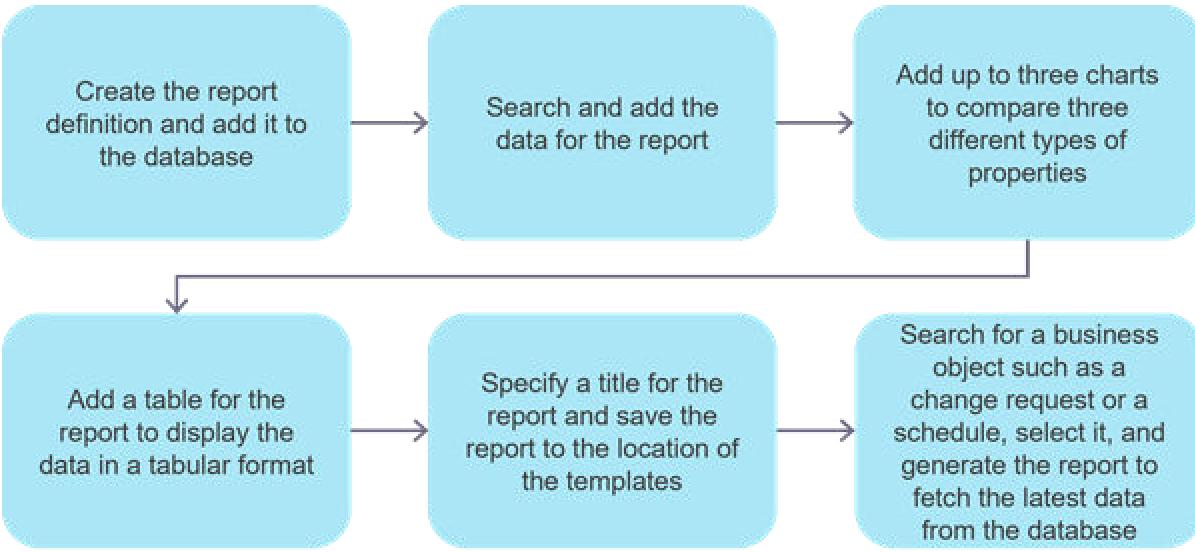
B. Specify a name, add other information as appropriate, and click **Add**.

C. (Optional) Run the report again to see the new scheduled task.

Create an active item report for change requests

You can create an active item report for change requests.

The process for creating and generating an active item report is as follows:



Procedure

1. (Optional) Create the sample data for the change request.

   The following procedures are optional. These change requests have part revisions as a problem item in this example. At your site, you can search for the appropriate object to add as the sample source to validate the related data.

   a. Select **Folders** and from the primary toolbar, click **New** > **Add** > **Part** and specify the name as **Test_Part**.

   b. In **Folders**, select the part you created and from the primary toolbar, click **New** > **Create Change** > **Change Request**, fill the required boxes, and click **Create and Submit**.

   c. Open the change request and choose the **Affected Items** tab. It displays the **Test_Part** part revision. In this example, while creating the report, a backward traversal rule is being created from the part revision to the change request.

d. Open the part revision and choose the **Changes** tab. This part has a relation type of **Problems** with the change request you created. **ProblemItem** is the relation or reference you must specify while creating the traversal rule for the report.

2. Create the report definition and add the data for the report.

   a. On the **HOME** page, click the **REPORTS** tile.

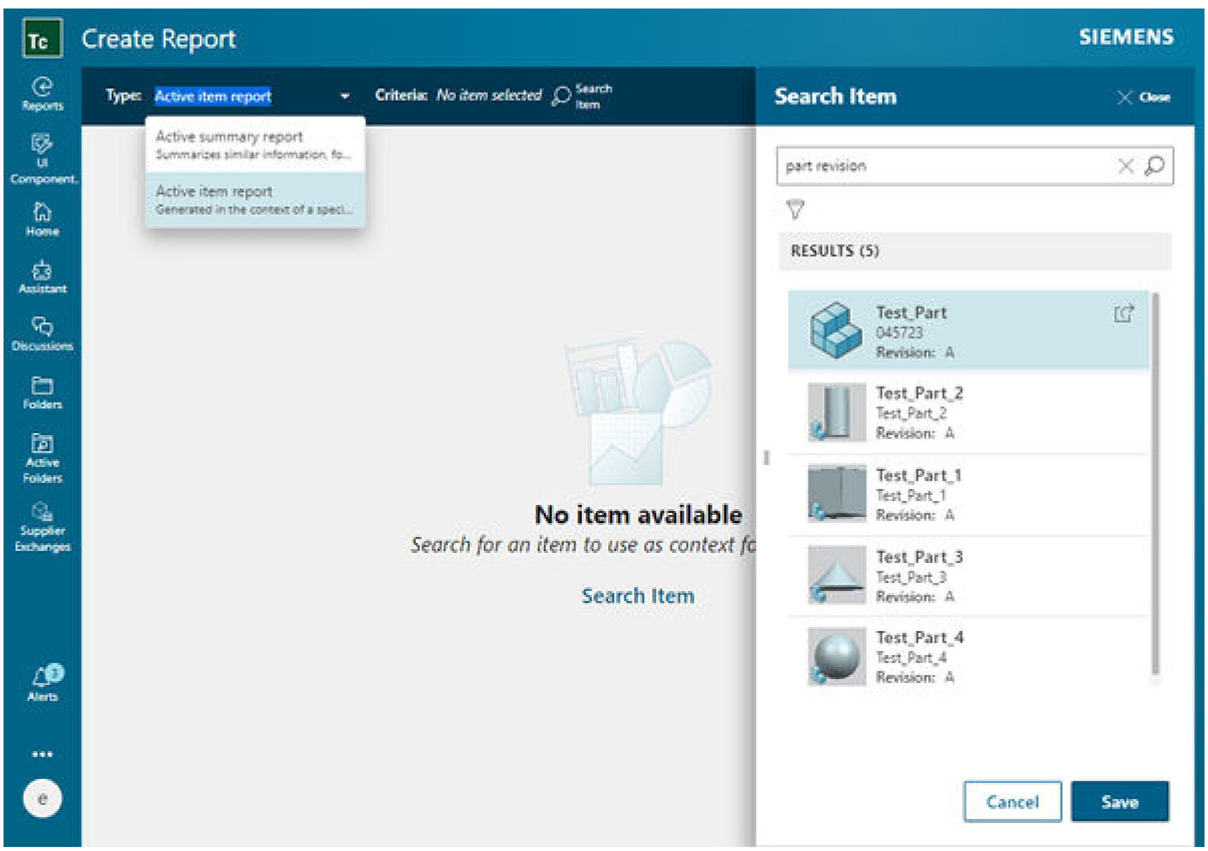
   b. In **My Dashboard** or **Templates**, click **New** > **Create Report**.

   c. To create an item report, select **Active item report**.

3. Search for the data you want to include in the report.

   a. To search for the item you want to include in the report, click **Search Item**.

   For example, type *part revision* to search for a part in the **Search Item** panel, select it, and click **Save**.

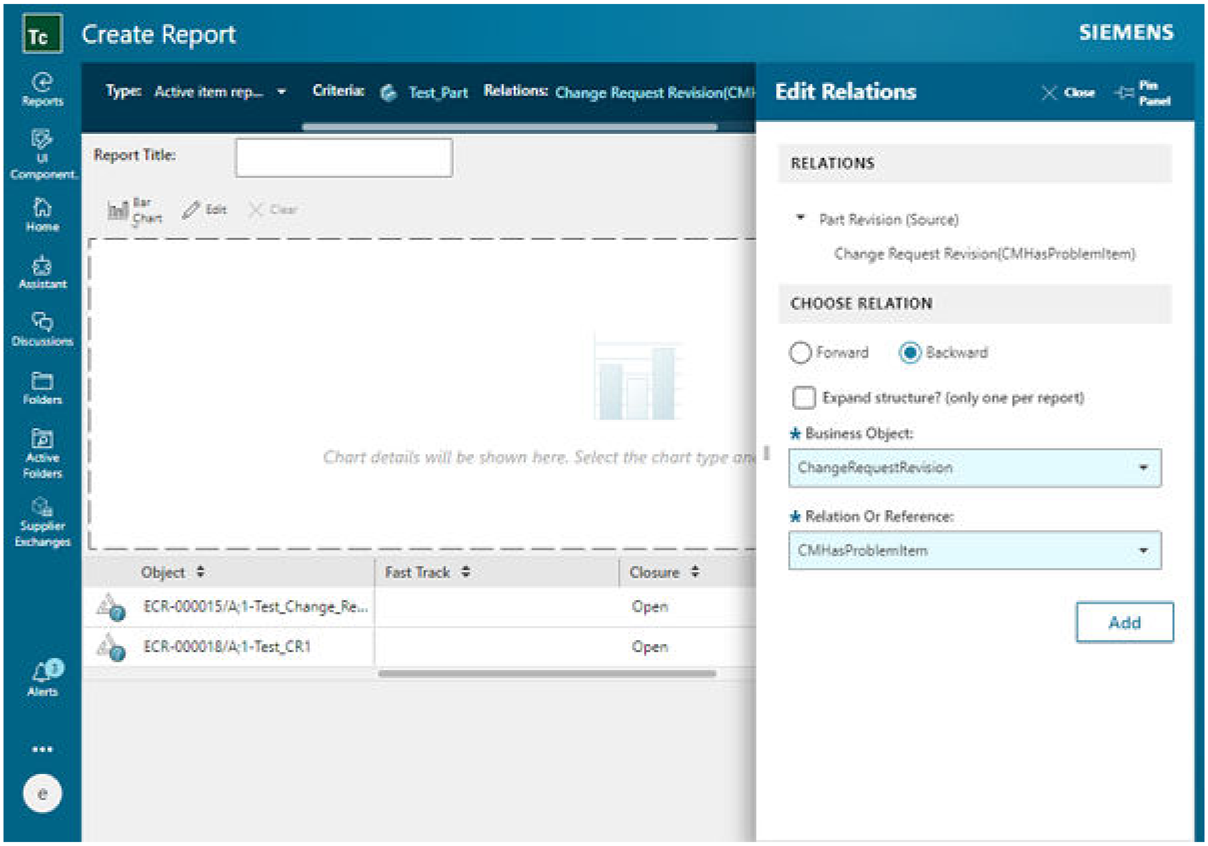


   b. To add relations, click **Add Relations**.

   c. Specify information as appropriate.

Example:

- Traversal direction: **Backward**
- **Business Object**: **ChangeRequestRevision**
- **Relation or Reference**: **CMHasProblemItem**



d. To add the relations, click **Add**.

4. Select a layout for the report and add charts

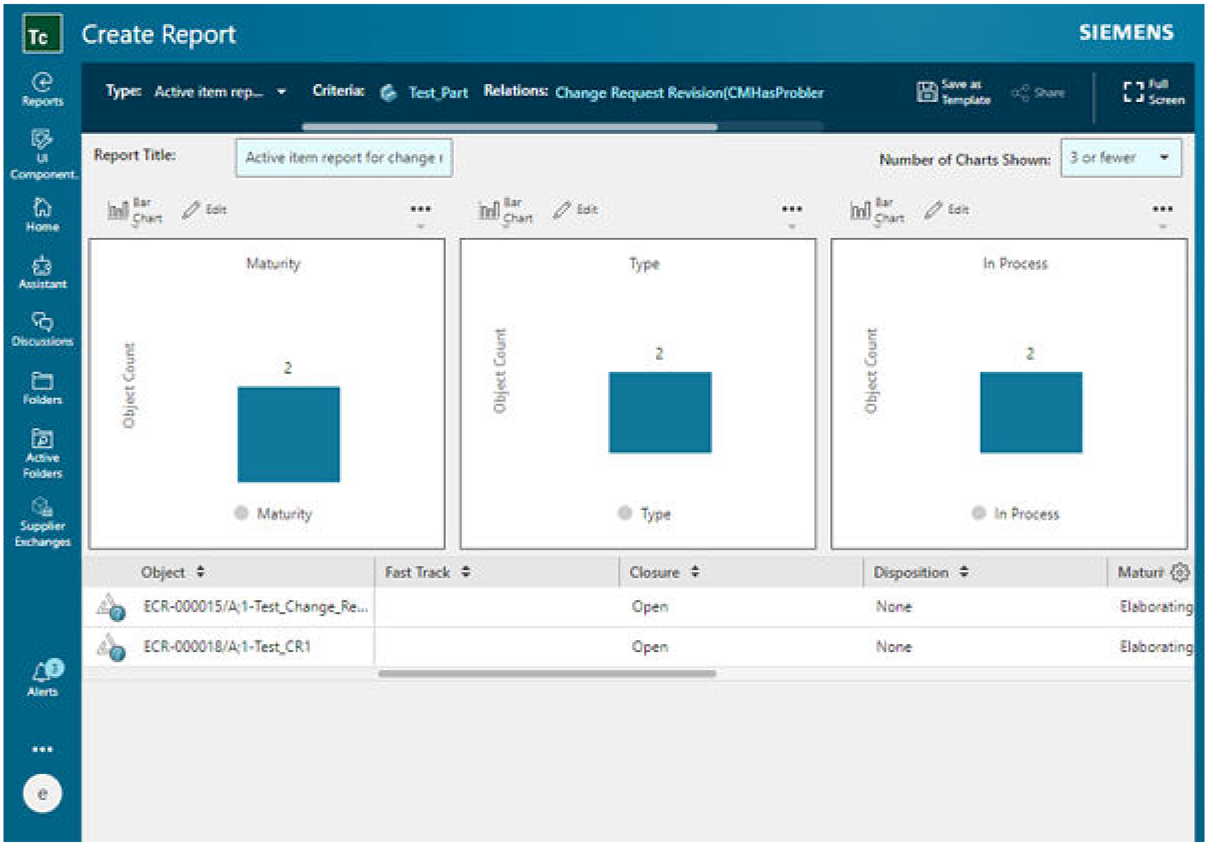
   You must first create the report definition and add the data for the report before you can select a layout and add charts and a table.

   a. Specify a report title.

   b. Specify the number of charts you want to add for this report by selecting the appropriate option.

   c. Select **Bar Chart**, **Pie Chart**, or **Line Chart** for the type of chart you want to create.

d. To create a layout for the report, click **Edit**.



e. To add a property for the chart, from the **Chart On** list, select a value, for example, **Status**.

f. Specify a title for the chart type or accept the default title.

g. To save this chart type, click **Save**.

h. To add the second and third charts, repeat the above steps. You can choose other properties for the second and the third chart, for example, **State** and **Priority**, respectively.

To use additional **Chart On** properties, use the **REPORT_AW_ItemReport_Objects_FilterProperties** preference.

You can work with all Teamcenter preferences from within the Active Workspace client by using the **Preferences** page.

For information about retrieving a list of preferences, see Where can I get a list of preferences? in *Active Workspace Administration* on Support Center.

i. After creating more than one chart, to move the chart, click **... More Commands** and select the appropriate option.

5. To display the data in a tabular format, add a table for the report.

   a. In the **TABLE** area, click **Table Settings** > **Arrange**.

   b. From **Available Columns**, select column name properties such as **Maturity**, **Disposition**, **Closure**, and **Creation Date**, and click > to move them to **Displayed Columns**.

   c. (Optional) To rearrange the columns in the table, in the **Column Name** area, select a column name, click the column widget, and move the column up or down.

   d. To save the column arrangement, click **Arrange**.

   e. (Optional) To add additional columns to the table, use the **REPORT_AW_ObjectType_Properties** preference.

6. Save the report as a template.

   a. To save the report as a template, click **Save as Template**.

   b. (Mandatory) Specify a name for the report.

   c. (Optional) Include a description.

   d. Click **Save**.

7. Edit the report from **Templates**.

   a. Navigate to the **Templates** location.

   b. Search for the report definition you want to edit, select it, and click **Edit** > **Edit Report**.

   c. Make the necessary changes and save the report.

8. Generate the report.

   a. Search for the schedule for which you want to generate the report.

   b. Select the program, and click **New** > **Generate Report**.

   c. Select the report you created and click **Generate**.

      The report is generated by fetching the latest data from the database.

   d. (Optional) Create another schedule task.

A. Open the schedule you created, click the **Tasks** tab, click **Add Schedule Task** ⊕, and select **Schedule Task**.

B. Specify a name, add other information as appropriate, and click **Add**.

C. (Optional) Run the report again to see the new scheduled task.

Viewing access rights

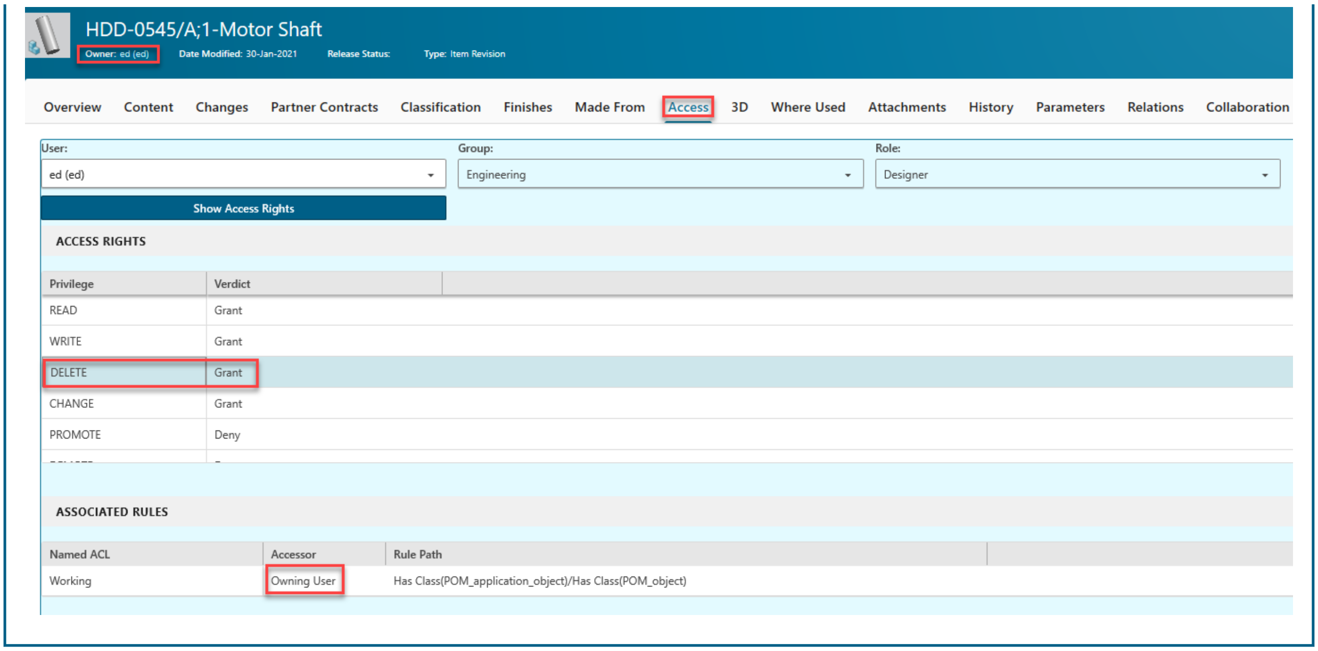
If your administrator has enabled the **Access** tab and granted you access, you can view access rights on a selected object in Active Workspace by clicking the **Access** tab.

The tab contains three sections.

Access rights context	Filters for user, group, role and project define the context in which user rights to the currently selected object are evaluated. Initially, the filters are set for the current user session context. You (and those users who have been granted permission by means of BMIDE conditions) can use the lists to select another combination of user, group, role and project for which you want to view the associated access rights for the currently selected object. Changes to these lists are applied when you click **Show Access Rights**.
ACCESS RIGHTS	Lists the operations granted to the filtered combination of user, group, role and project.
ASSOCIATED RULES	Lists the rules associated with the given object and selected operation.

Example:

In this example, user Ed can view his access rights and associated rules for his role as designer in the Engineering group working on a motor shaft. Here Ed can see what rule grants him copy privileges for item revisions on which he is working.

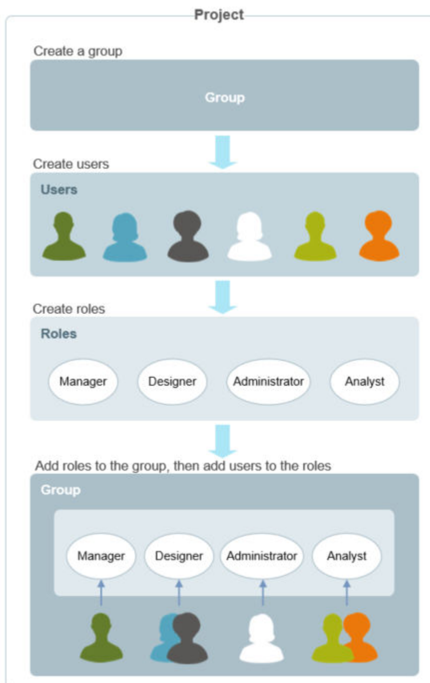


Using Projects

What are projects and programs?

Companies have *programs* that usually include cross-functional teams. These programs can have a collection of related *projects* under them, each of which focuses on a specific tangible output.

A typical project comprises a group of users each having one or more roles.



The Teamcenter Project application enables you to organize your data and control access to a collection of related data, which may be accessible to multiple organizations. These organizations can include project teams, development teams, suppliers, and customers.

Why do I want to use Projects?

In Active Workspace, you can use the **PROJECTS** tile on your home page to access your programs and projects. If you are a privileged team member you can manage your programs and projects by assigning or removing objects from them. If you are a project administrator, you can create and modify projects and programs and manage your team members. However, you must use the rich client to delete projects and programs. You must also use the rich client to create and manage single-level hierarchical projects.

What privileges do project administrators and team members have?

The following table describes the privileges of the project administrators and team members.

	Create projects and programs	Add or remove members, assign status, including team administrator	Assign or remove objects from projects and programs	View objects
Project Administrator	Yes	Yes	Yes	Yes
Team Administrator[1]		Yes	Yes	Yes

	Create projects and programs	Add or remove members, assign status, including team administrator	Assign or remove objects from projects and programs	View objects
Privileged team member			Yes	Yes
Non-privileged team member				Yes

Create a project or a program

In Active Workspace, if you are a **Project Administrator** or have **DBA** privileges, you can create a project or a program either by using:

- **Add Project** to add a new project or program.
- **Save As** to leverage your existing project or program to define a new project or program.

Add a new project or program

1. From the **Projects** location, click **New** > **Add Project** using the primary toolbar. Or, you can click **Add Project** from the results panel toolbar if you do not have a project already selected in the primary work area.

   To create multiple projects or programs, click **Pin Panel** on the **Add Project** pane.

2. Enter the ID and name of the new project or program.

   Project and program names must be unique within your site. Also, they cannot have the same name as any group within your site.

3. (Optional) Add a description.

4. (Optional) Select a project category from the drop-down list: **Internal**, **Partner**, or **Supplier**.

   Project categories allow you to control access to objects in a project without using access control rules. You can define project categories using the **Fnd0ProjectCategories** list of values (LOV).

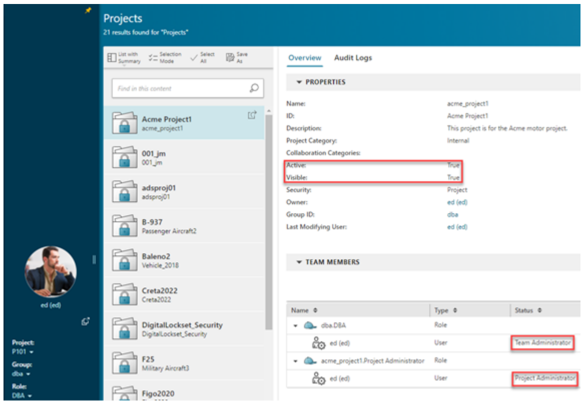
5. From the **Security** section, select either **Project** (default) or **Program**.

6. Click **Add**.

1 There can be multiple team administrators for each project or program. This is often necessary to balance resource management tasks for large projects.

Your newly created project or program appears at the top of the **Projects** list and is highlighted. By default, it is set to **Active** and **Visible**, as shown in the **PROPERTIES** section.

You are also added in the **TEAM MEMBERS** section as both the **Project Administrator** and **Team Administrator** for the newly created project or program.



Leverage your existing project or program

1. From the **Projects** location, select an existing project or program for which you are a **Project Administrator** or have **DBA** privileges.

2. Click **Save As** from the results panel toolbar. Or, you can click **New** > **Save As** using the primary toolbar.

   To create multiple projects or programs, click **Pin Panel** on the **Save As New Project** pane.

3. Edit the ID and name of the new project or program to make them unique.

   Project and program names must be unique within your site. Also, they cannot have the same name as any group within your site.

4. (Optional) Modify the description.

5. (Optional) Modify the project category by selecting a project category from the drop-down list: **Internal**, **Partner**, or **Supplier**.

   Project categories allow you to control access to objects in a project without using access control rules.

   You can define project categories using the **Fnd0ProjectCategories** list of values (LOV).

6. (Optional) From the **Security** section, select **Include project data and libraries**.

7. Click **Save**.

Your newly created project or program appears at the top of the **Projects** list and is highlighted. By default, the newly created project or program is set to **Active** and **Visible**, as shown in the **PROPERTIES** section.

By default, the project or program team, along with the accompanying metadata, gets copied to the newly created project or program.

If you selected **Include project data and libraries**, you can open your newly created project and select the **Contents** tab to verify the project data and libraries were successfully included.

Modify projects and programs

Edit project and program properties and team members

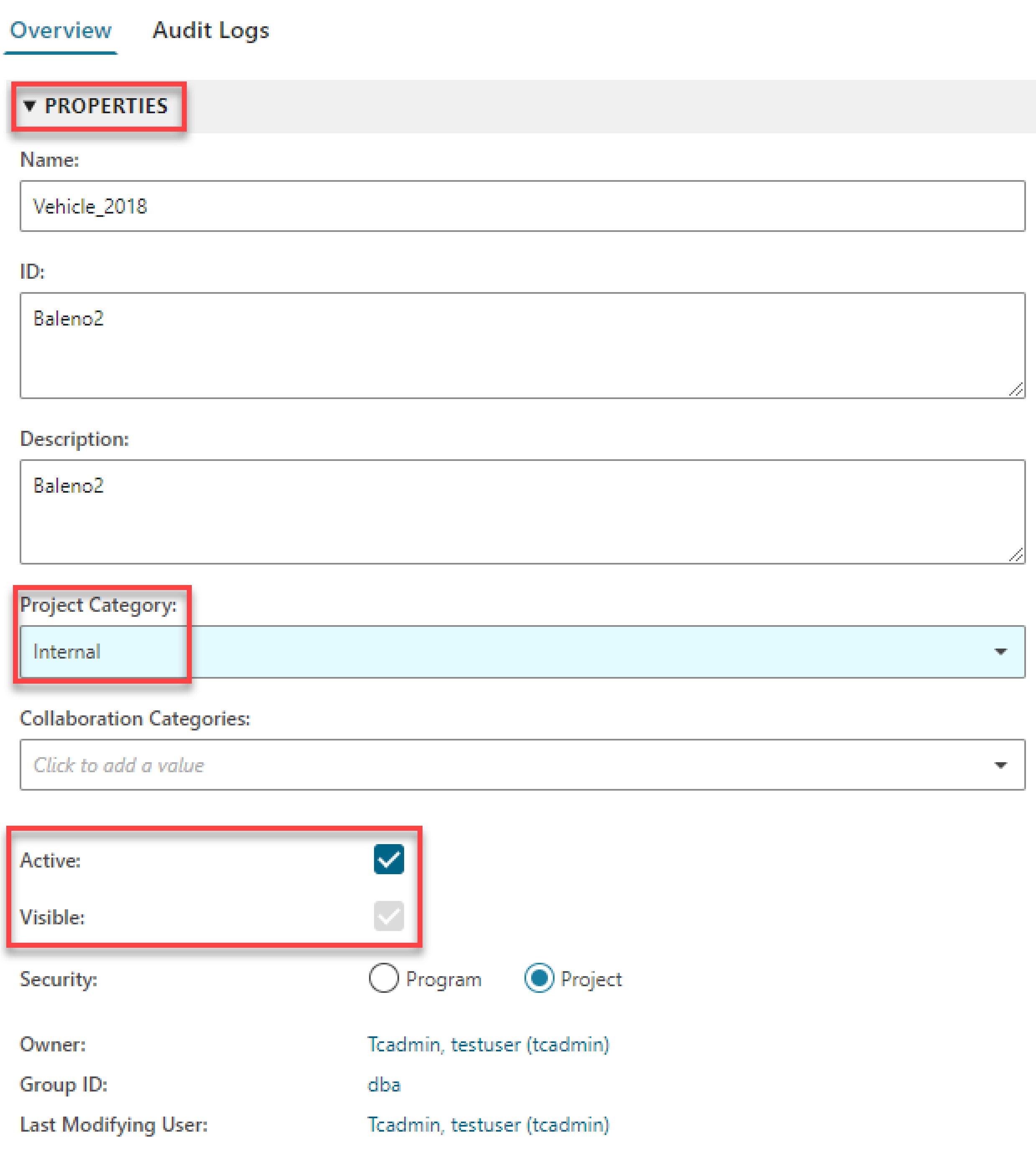
From the **Overview** tab in the **Projects** location, you can:

- **Edit your project or program properties**.
- **Add or remove team members**.
- **Assign status**.
- **Use search and facet filtering to locate team members**.
- **Assign a default project for your team member**.

Edit your project and program properties

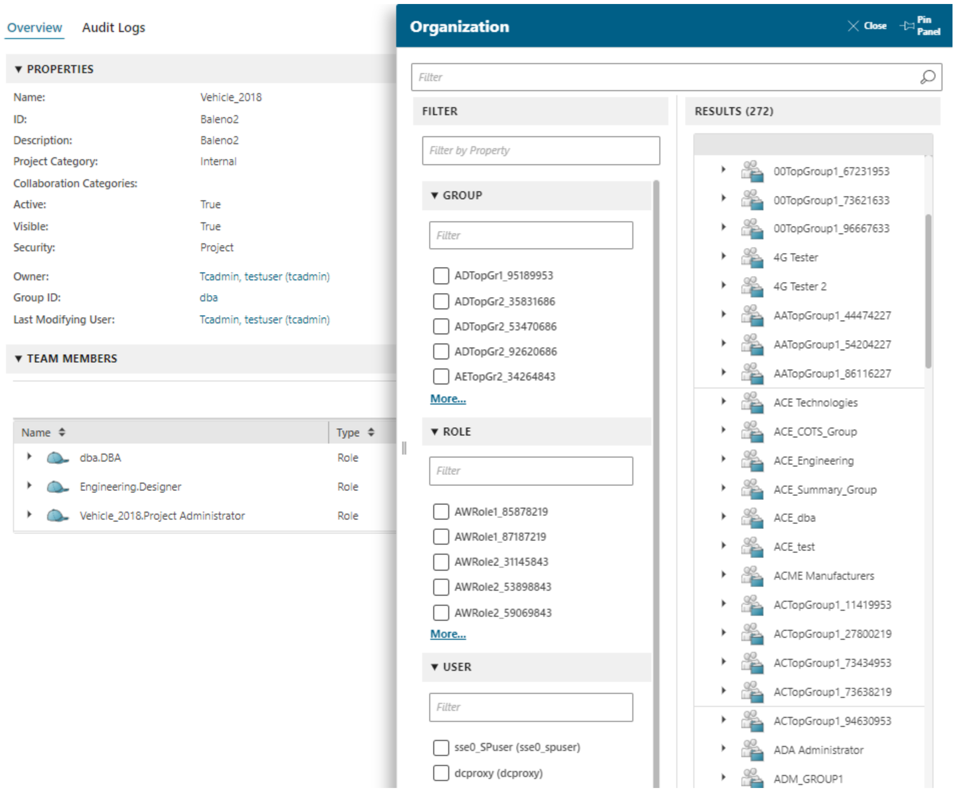
In the **PROPERTIES** section, you can modify your project and program properties by selecting **Edit** > **Start Edit** in such circumstances where you may want to:

- Change project category from **Internal** to **Supplier**, for example.
- Remove **Active** status if your project or program is no longer active.
- Remove **Visible** status if your project or program is no longer active.



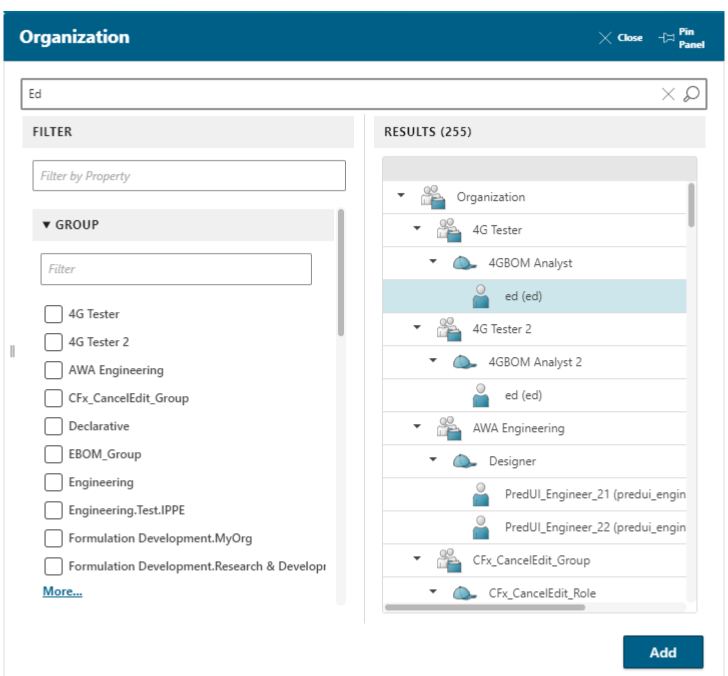
Add or remove team members

In the **TEAM MEMBERS** section, you can add users, roles, or groups to your team by clicking **Add** ⊕ to display the **Organization** panel with filtering capability. You can use the filtering capability of this panel to filter by in context or by category (group, role, or user).

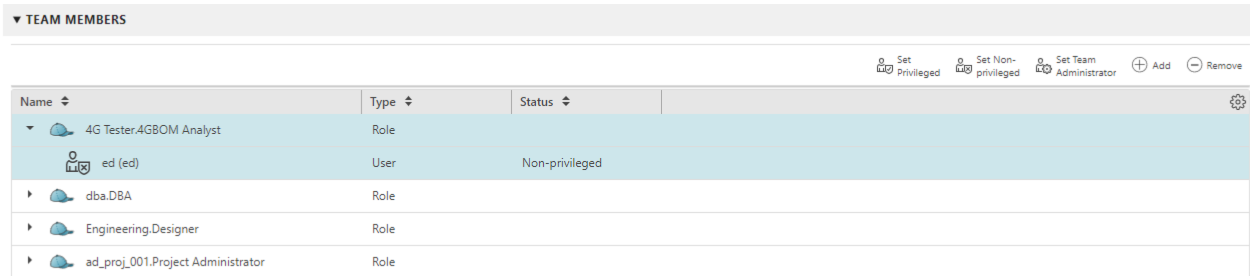


Example 1 - Filter by any string

1. Filter by any string, for example, **Ed**, to display the matching nodes where user Ed appears in your organization.



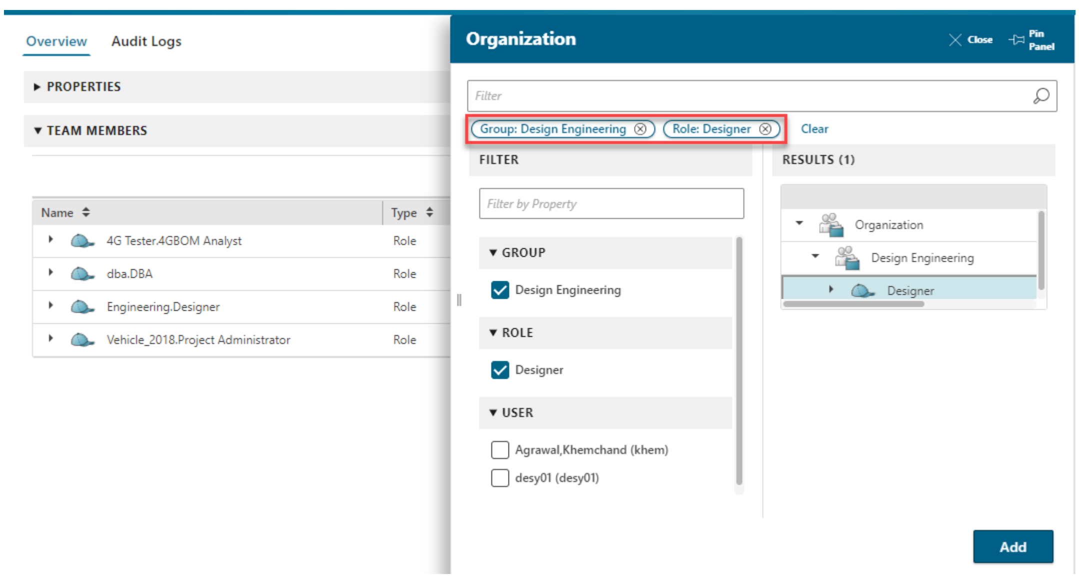
2. To add **Ed** in his role as a **4GBOM Analyst** to your team, click **Add**. He has **Non-privileged** status on the project. You can assign him a different status.



Example 2 - Facet filter to add all users of a role within a specific group to add to a project team

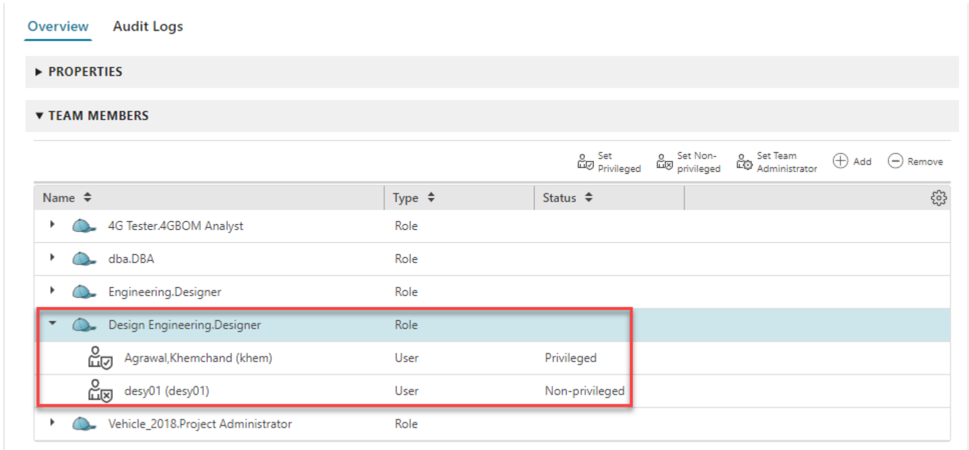
1. To add all users with the role of **Designer** in the **Design Engineering** group, filter on the **Designer** role and select the **Design Engineering** group.

2. Click **Add**.



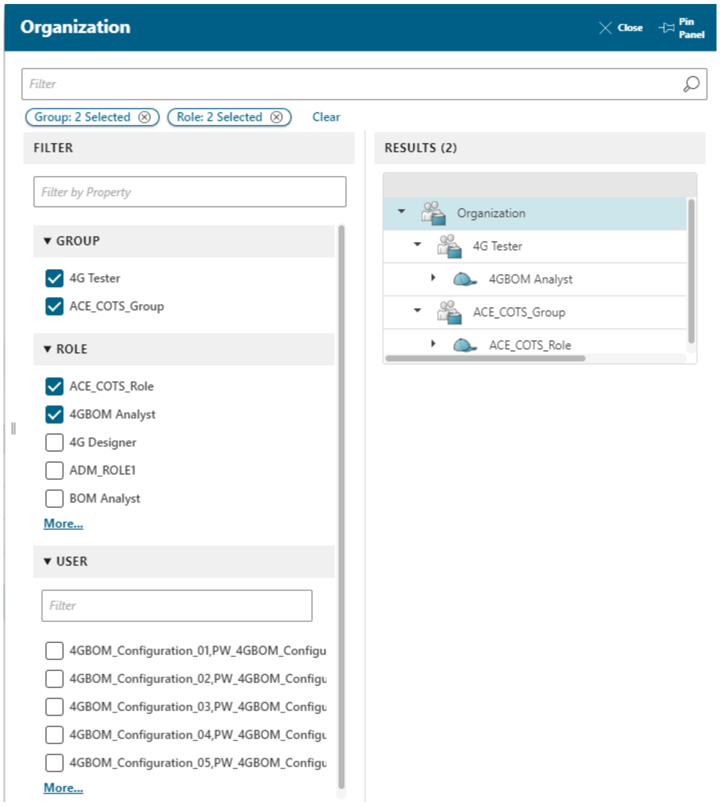
Two designers have been added to the project.

> Note:
>
> One of the two designers added has **Privileged** status because the user was assigned **Privileged** status in another role in this same project.

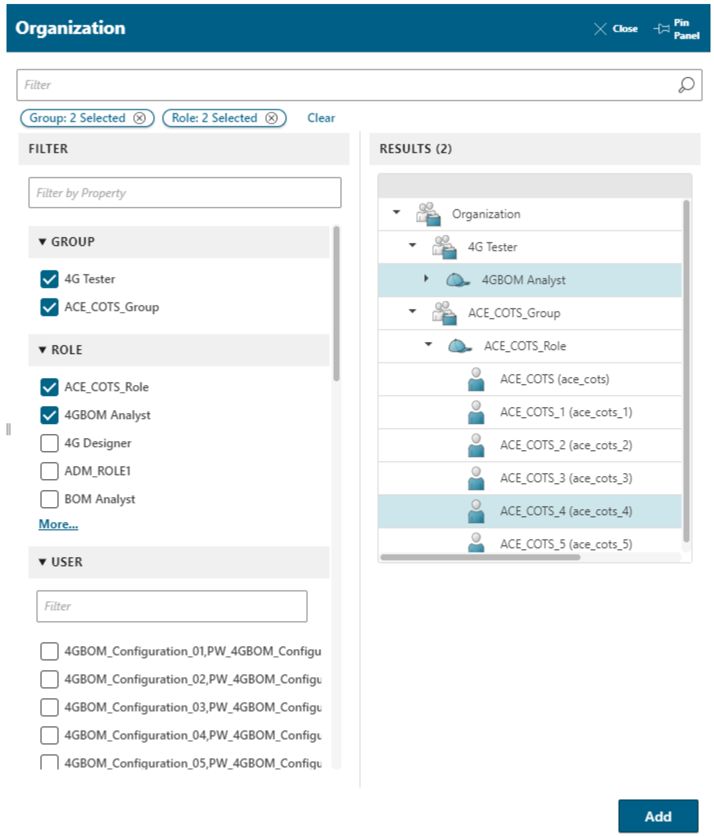


Example 3 - Facet filter to add groups and roles to a project team

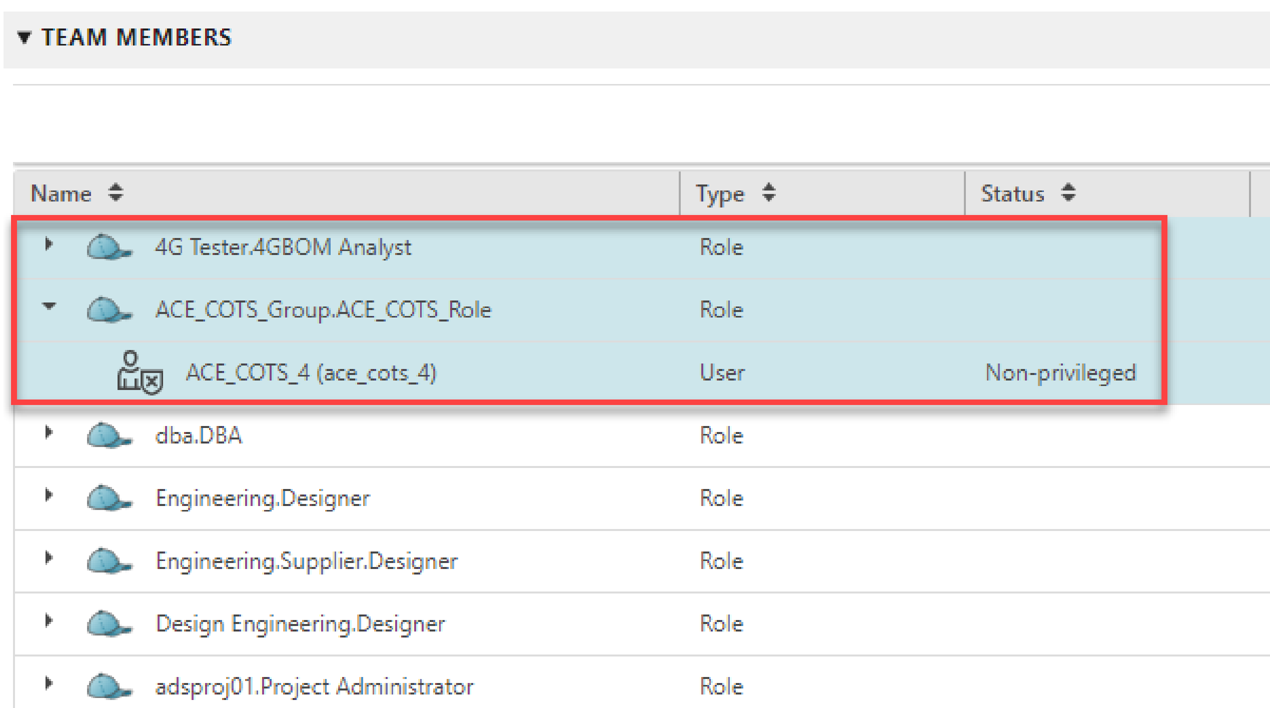
1. Use *multi-select* facet filtering to select groups and roles from which you want to select roles and users.



2. Expand the results, select the roles and users you want to add to your project, and click **Add**.

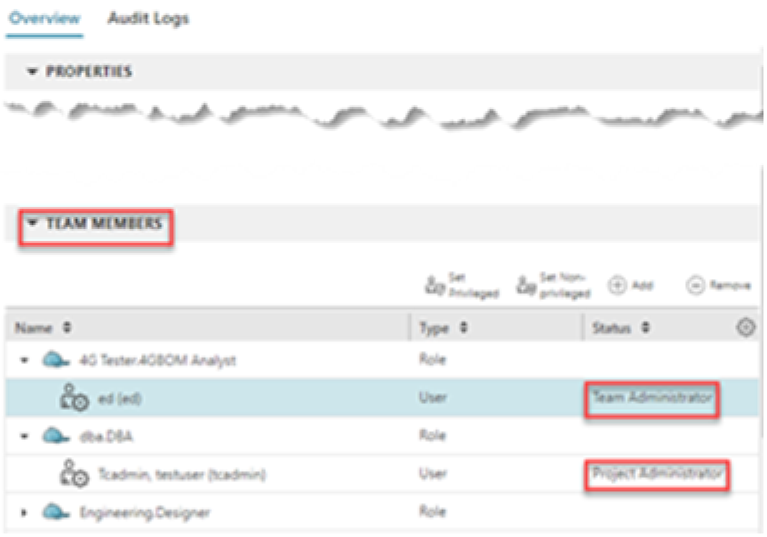


3. In this case, the selected role and users are added to the project.



Assign status

As the creator of the project or program, you are automatically assigned both **Project Administrator** and **Team Administrator** status.



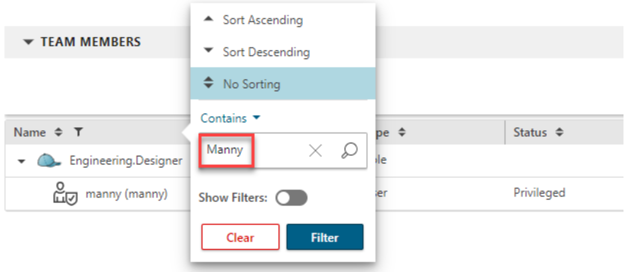
Use the **Set Privileged**, **Set Non-privileged**, and **Set Team Administrator** to assign status to your team members.

Use search and facet filtering to locate team members

You can perform search, sort, and **facet filtering** on each of the columns (**Name**, **Type**, and **Status**).

Example 1 - Locate team member, Manny, using search

For example, to locate team member, Manny, click the **Name** header to display the filter and type **Manny** in the search box.



Example 2 - Locate all Engineering users with status of Privileged using search and facet filtering

Both search and facet filtering enable you to quickly identify all Engineering team members with **Privileged** status.

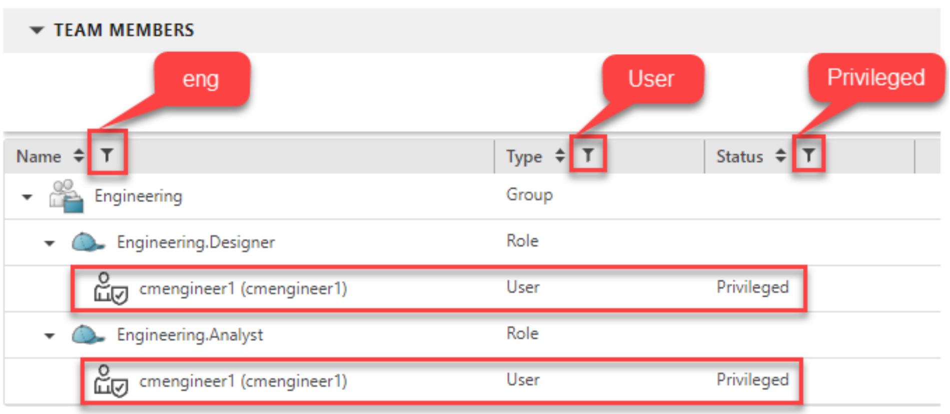
1. Search the **Name** column for names containing **eng**.

2. Use facet filtering to filter the **Type** column by selecting **User**.

3. Use facet filtering to filter the **Status** column by selecting **Privileged**.

To search column...	Do...
Name for all users with **eng** in their name	Search for **eng**.
Type to select type **User**	Select the **User** facet.
Status to select **Privileged** status	Select the **Privileged** facet.

You can sort your results in the table by clicking the column header and choosing to sort by ascending, descending, or no sorting.



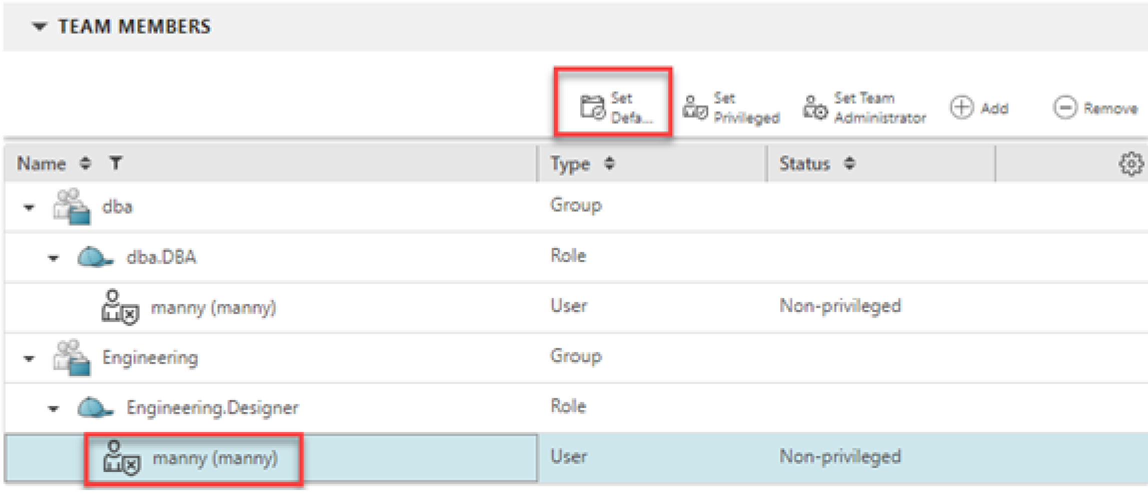
To clear all filters, click **Table Settings** > **Clear all filters**.

Assign a default project for your team member

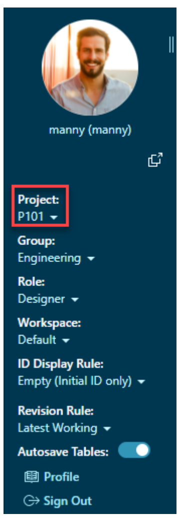
As a team administrator, you can assign a default project to a team member.

1. Select a program for which you are an administrator.

2. In the **TEAM MEMBERS** section, select one or multiple team members from the list of users in the program's **TEAM MEMBERS** section and click **Set Default Project**.



The user can confirm their default project from the global navigation, by clicking the profile icon. For example, Manny's default project is shown as **P101**.



Add or remove objects to or from projects

If you are a privileged member in one or more projects, you can *add* objects, such as parts and documents, to projects, or *remove* objects from projects.

1. Select one or more parts, documents, or other objects.

2. Click **Manage** > **Projects** .

   The **Projects** pane is displayed with **Member of** and **Available** lists.

3. You add or remove the selected objects to or from a project.

- In the **Available** project list, select a project and click **Add Project** ⊕ to move the project to the **Member of** project list.
- In the **Member of** project list, select a project click **Remove Project** ⊖ to move the project to the **Available** project list.

4. Associate the objects with **This Revision** or **All Revisions**.

5. Click **Save** to complete the action.

Assign or remove assemblies to or from projects

If you are a privileged member in one or more projects, you can assign or remove assemblies to or from projects.

1. Select one or more assemblies.

2. Click **Manage** > **Projects**.

   The **Projects** pane is displayed with **Member of** and **Available** lists.

3. Select a project.

   - In the **Available** project list, click **Add Project** ⊕ to move the project to the **Member of** project list.
   - In the **Member of** project list, click **Remove Project** ⊖ to move the project to the **Available** project list.

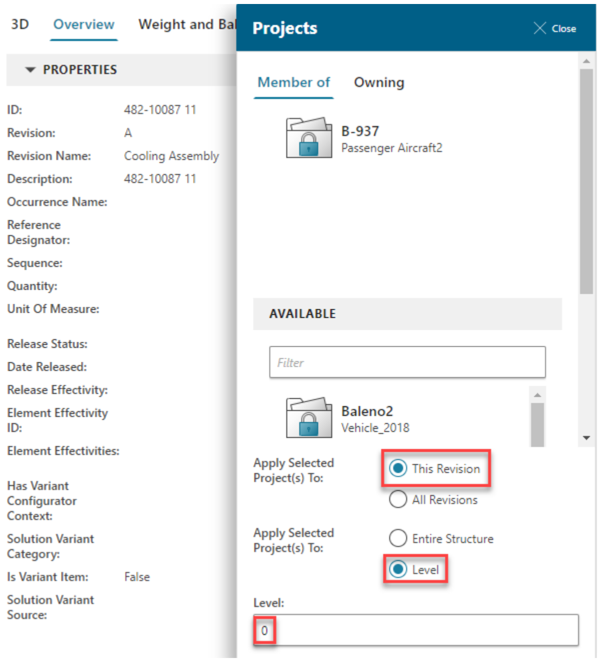
4. Associate the assembly with **This Revision** or **All Revisions**. In addition, you can select either **Entire Structure** or at the item level (**Level**).

5. Click **Save**.

6. (Optional) You can verify the assignment by viewing the assembly in Structure Manager in the Teamcenter rich client.

Example

As part of the **B-937** project, you can select **Cooling Assembly 482-10087 11** as the assembly, associate it with **This Revision**, and apply the **Level** of propagation (**0** by default). Designating a propagation level of zero (0) here allows only the selected revision of the **Cooling Assembly 482-10087 11** object to be assigned to the **B-937** project.



You can confirm this association by viewing the result in Structure Manager in the Teamcenter rich client.

Assign a project during a Save As operation

If you are a privileged member of one or more projects, you can assign objects, such as parts and documents, to projects during a Save As operation.

1. Select a part, document, or another object.
2. Click **New** > **Save As or Revise**.
3. From the **Save As** pane, select **New**.
4. From the **PROJECTS** section, click **Add Project**.
5. Select one or more projects from the list of available projects.
6. Click **Assign** to assign the selected projects to the new item.
7. Click **Save** to save the projects added.

   From the **PROJECTS** section of the **Overview** tab of the newly created item, you can verify the projects that were assigned.

Apply project-level security to selected objects

If you are a privileged member of one or more projects, you can assign project-level security to selected objects. Security at the item level is applied to all revisions.

1. Select one or more assemblies.

2. Click **Manage** > **Projects**.

   The **Projects** pane is displayed with **Member of** and **Available** lists.

3. Select a project.

   - In the **Available** list, click **Add Project** to move the project to the **Member of** list.

   - In the **Member of** list, click **Remove Project** to move the project to the **Available** list.

4. Associate the assembly with **This Revision** or **All Revisions**.

5. Click **Save**.

Assign a project when creating a revision

If you are a privileged member of one or more projects, you can assign objects, such as parts and documents, to projects.

1. Select a part, document, or another object.

2. Click **New** > **Save As or Revise**.

3. From the **Save As** dialog box, select **Revision**.

4. From the **PROJECTS** section, click **Add Project**.

5. Select one or more projects from the list of available projects.

6. Click **Assign** to assign the selected projects to the new object.

7. Click **Save** to assign the projects to the new revision.

   From the **PROJECTS** section of the **Overview** tab of the newly created object, you can verify the projects that were assigned.

Set or change an owning program

You can set the owning program on an object to control access to data.

- You must be a privileged user with **Assign to Project** access for the selected objects.
- The **autoAssignToProject** extension must be configured for object types.
- You can select one or more objects (for example, item or item revision) and set an owning program, if the selected objects do not have an owning program already set. Once set, the owning program is set for all related objects if propagation rules are defined for the respective relation. The projects list is also updated.
- You can change the owning program of an object.

Set an owning program

You can set an owning program for an object to control access to data. Once set, the owning program is set for all related objects if propagation rules are defined for the respective relation. The projects list is also updated.

1. Select one or more objects.

   > Note:
   >
   > You can select multiple objects and assign the owning program. However, the **Owning** tab displays the owning program only when the selected objects have the same owning program.

2. Click **Manage** > **Projects** .

3. Select the **Owning** tab to display the list of available projects.

4. Select an owning program and click **Set** .

5. Click **Save**.

   In the **Overview** tab, the **Owning Project** and **Projects** fields in the **PROJECTS** section are updated with the owning project information.

Change an owning program

1. Select one or more objects.

> Note:
>
> You can select multiple objects and assign the owning program. However, the **Owning** tab displays the owning program only when the selected objects have the same owning program.

2. Click **Manage** > **Projects** .

3. Select the **Owning** tab to view the owning program.

4. From the list of available programs, select the new owning program. A **Replace** icon appears.

5. Click **Save**.

   In the **Overview** tab, the **Owning Project** and **Projects** fields in the **PROJECTS** section are updated with the owning project information.

6. Communicating across your organization

Exchanging information and ideas in Active Workspace

It is important to exchange information and ideas with people both inside and outside your team without going to a public system. You can use two methods of communication within Active Workspace:

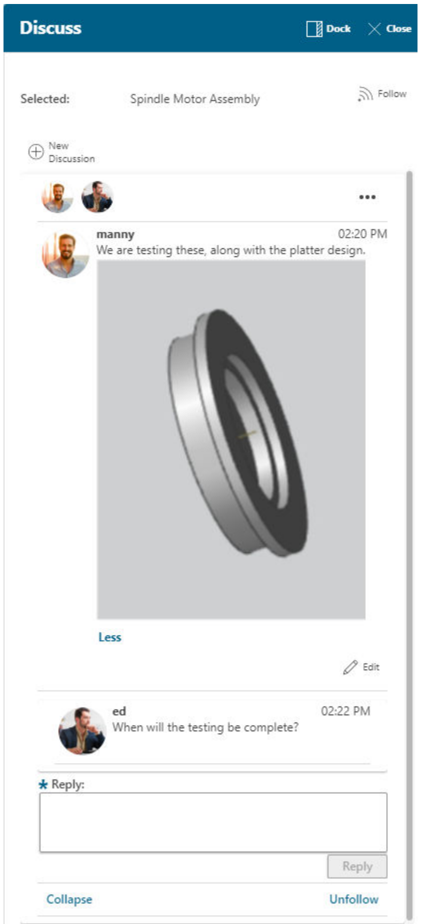
- *Discussions* allows you to create discussions on objects you select in Active Workspace.

- *Subscriptions* allows you to create notifications for actions on objects, for example, check out.

Using Discussions

What are discussions?

A *discussion* is a dialog you create with others on objects you select in Active Workspace, such as items, parts, and documents. This is done without using public networks by using the internal collaboration application, Discussions. A discussion can be viewed by those who have privileges to view the object or can be private (limited to selected persons). For example, you can interact with your project team and management to review product content or obtain technical information.



In addition, you can add a *product snapshot* to a new discussion, or you can create a discussion about a product snapshot. Product snapshots, which capture the 3D data associated with a product, require Teamcenter lifecycle visualization.

Use Discuss to gain feedback about objects

The **Discuss** panel in Active Workspace enables you to perform many tasks:

- **Create a new discussion** to share information with others or use the private message feature to only include selected participants in your discussion.

- **Share a snapshot** in a discussion to allow people to talk about what is happening in the view where the snapshot was taken.

- Use the tracked discussion feature (if enabled) to track the status and priority of your discussion. For example, if you need to track your discussion with the engineer about your request for a part modification, you can track the status of your discussion based on whether it is **Open**, **In Progress**, or **Closed**. This feature must be configured by your administrator. If this feature is enabled, the **Tracked** check box is displayed.

- Easily **view discussions on the selected object or in the Discussions feed location and reply to a particular discussion**.
- **View automated messages** on a discussion that has been updated, for example, if an additional participant is added to the discussion.
- **Follow a particular discussion or all discussions on an object**.
- **Unfollow a particular discussion or all discussions on an object** if you no longer wish to see it in the Discussions feed location.
- **Edit a discussion** on an object.
- **Edit your own comment** on a discussion.
- **Delete a discussion**. You can do this *only* if your administrator has configured this delete option for your group and role.

Create a new discussion

A discussion is a dialog you create with others on objects you select, such as items, parts, and documents.

1. Select the object you want to create a discussion on and click **Discuss** on the primary toolbar to display the **Discuss** panel.

   > Note:
   >
   > If the selected object is a child of a product structure, your discussion is attached to the revision and not to the occurrence of the revision.

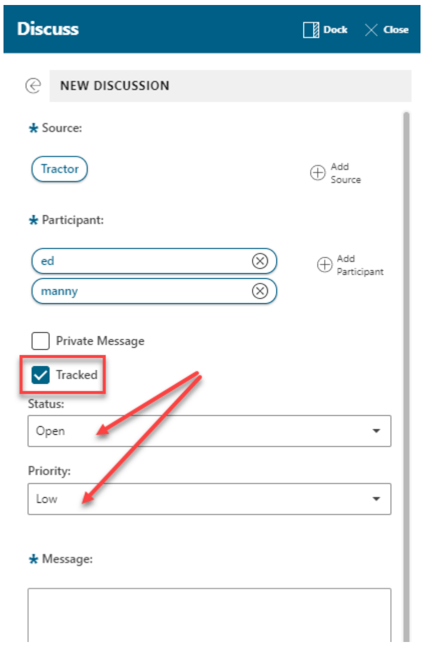
2. Click **New Discussion** ⊕ to begin a new discussion on the selected object.
3. (Optional) Click **Add Source** ⊕ to add one or more additional source objects to the discussion. Select an additional source using either the **Palette** tab or the **Search** tab.
4. (Optional) Click **Add Participant** ⊕ to add one or more participants from your organization to the discussion. Select the participant and click **Add**.
5. (Optional) Click the **Private Message** box to create a discussion viewable only by the participants added to the discussion. In addition, participants in the private message automatically follow the discussion. When created, private messages appear with a lock icon.
6. (Optional) Click the **Tracked** box to track the status and priority of a discussion. By default, the status is **Open** and the priority is **Low**. You can set the priority (**Low**, **Medium**, or **High**) using the drop-down list.

a. Click **Tracked**.

The **Status** and **Priority** drop-down lists are displayed.

b. Set the **Status** value as **Open** (default), **In Progress**, or **Closed**.

c. Select the **Priority** value as **Low** (default), **Medium**, or **High**.



This feature must be configured by your administrator. If this feature is not enabled, the **Tracked** check box is not displayed.

Tracked discussions can be viewed from both the **Feed** and **Tracked** tabs in the **Discussions location** on the global navigation bar.

7. Compose the message.

Select the **Message** area to enable:

- Bold
- Font family
- Font color
- Font background color
- Insert image (GIF, JPEG, JPG, and PNG)

8. Click **Create** to create the discussion on the object.

   The new discussion appears on the Discuss panel. Each discussion has a timestamp and new discussions appear at the top of the list. As the creator of the discussion, you are automatically set to follow all replies in the new discussion. If you want to follow discussions on the object other than your own, click **Follow** to the right of the selected object name in the **Discuss** panel.

   The new discussion is also displayed in the Discussions location on the global navigation bar. Click either **Discussions** on the global navigation bar or the **DISCUSSIONS** tile on your home page to view your new discussion.

View and reply to a discussion on a selected object

Once a discussion is created in the system, you can view it and optionally reply.

1. Click **Discussions** on the global navigation bar to display the **Discussions** panel's **Feed** tab.

   Here you can view all discussions on which you are a participant or are following. The discussion most recently replied to appears at the top of the discussion list.

   > Tip:
   >
   > Alternatively, you can click **Discuss** on the primary toolbar to view discussions on the object you have selected.

2. (Optional) If the discussion has participants, you can hover over the people icon to determine the recipients of the discussion message.

3. Click **Reply** to reply to a discussion.

4. Compose the message and click **Reply**.

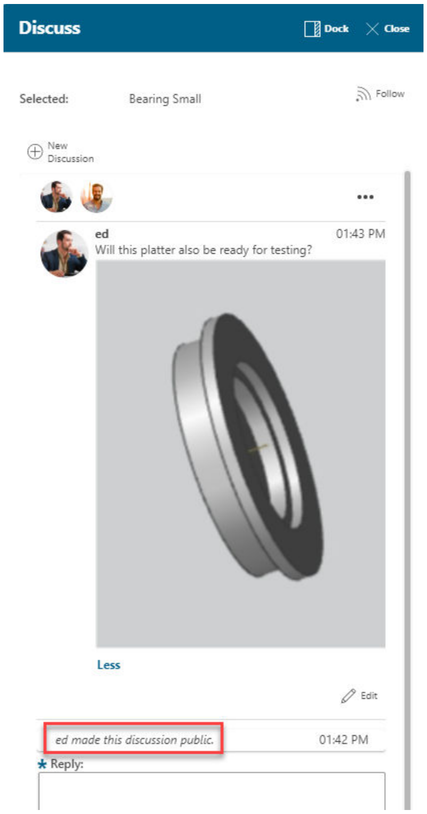
   This saves your reply and increments the **Reply** indicator by one.

Review automated messages informing you of updates

Automated messages are generated when:

- A participant is added or removed.
- The public or private status changes.
- Either of the tracked fields changes (**Status** and **Priority**).
- A snapshot is removed from a discussion.

For example, Ed made the following discussion viewable to anyone navigating to the source objects by clearing the **Private Message** box. A message is automatically added to the discussion showing who made the change, what was changed, and the time the change was made.



Follow a discussion

You can receive notifications on *all discussions* for objects you follow or receive notifications for *a particular discussion*.

For example, select **Follow** to receive notifications when new discussions or replies are made in relation to the source object. This is especially useful if you want to see responses to an object you own.

1. Select the object and click **Discuss** on the primary toolbar to display the **Discuss** panel.

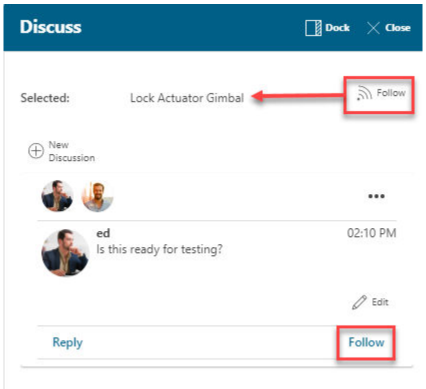
2. To receive notifications, perform either of the following:

   - On *all discussions* about the selected source object.

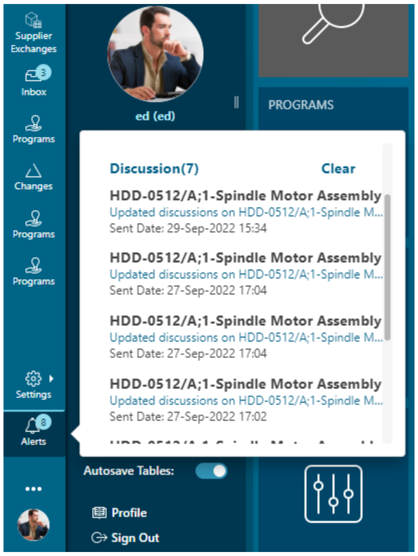
     For example, click **Follow** to the right of **Lock Actuator Gimbal** to follow all discussions on this source object.

   - On *a particular discussion* regarding the selected source object.

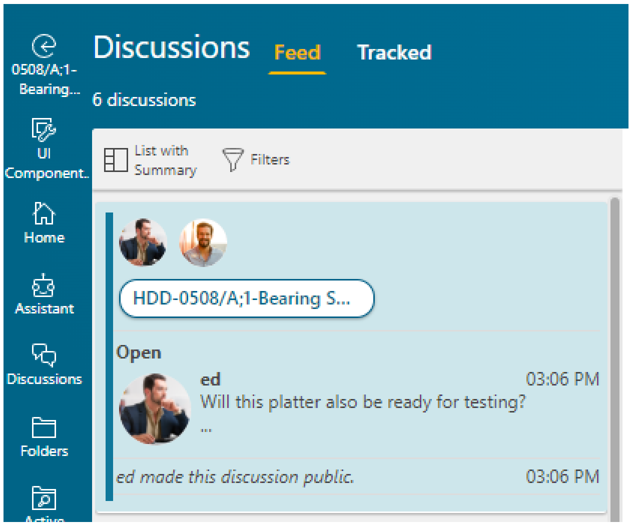
For example, click **Follow** in the reply area to follow all replies on this particular discussion.



You are notified of discussions and replies to the discussions you are following via the Alerts button on the global navigation bar.



You can also view discussions in the Discussions location by clicking either **Discussions** on the global navigation bar or the **DISCUSSIONS** tile on your home page. If the tracked message feature is enabled by your administrator, the **Discussions** location has a **Feed** tab that displays the latest updates to discussions and a **Tracked** tab that displays your tracked discussions.



Unfollow a discussion

You can unfollow a discussion from the following panels: **Discuss**, **Feed**, or **Tracked**.

To unfollow a discussion from the Discuss panel	To unfollow a particular discussion or all discussions on a source object and stop receiving notifications, click **Unfollow** next to the selected source object or at the bottom of the selected discussion.
To unfollow a discussion from the Feed or Tracked panel	Select the discussion and click **Unfollow** at the bottom of the discussion.

In addition to unfollowing a discussion on an object, you can unfollow the object of the discussion.

Edit a discussion

If you are a participant in a discussion, you can edit a discussion from the **Feed** or **Tracked** tab, **Discussions** location, or the **Discuss** panel associated with the source object.

1. Select the discussion you wish to edit and click ▫▫▫ > **Edit**.

2. Edit the discussion by performing one or more of the following:

   - Add or remove source objects.
   - Add or remove participants.
   - Activate or deactivate private message.
   - If tracked is enabled, set the discussion to tracked or untracked, and change the status or priority of the discussion.

3. Click **Save** to save your changes or close the panel to discard the changes.

   The timestamp on the edited discussion is automatically updated.

Edit your own comment

You can edit your own comment on a discussion from the **Feed** or **Tracked** tab, **Discussions** location, or the **Discuss** panel associated with the source object.

1. Select the discussion you wish to edit and click **Edit** .

2. Make changes to your comment.

3. Click **Save** to save your changes or click **Cancel** to cancel your changes.

Delete a discussion

You can delete discussions of which you are a participant and, if tasked, you can delete discussions for other users.

> Note:
>
> You can only delete a discussion if your administrator has configured the delete option for your group and role. Deleting a discussion also deletes the replies included in it.

Delete discussions of which you are a participant

You can delete a discussion from the **Feed** or **Tracked** tab, the **Discussions** location, or the **Discuss** panel associated with the source object.

- Delete a discussion from the **Feed** or **Tracked** tab or **Discussions** location:

  - Select the discussion you wish to delete and click **More** > **Delete** .

- Delete a discussion from the **Discuss** panel:

  1. Select the object and click **Discuss** on the primary toolbar to display the **Discuss** panel and its discussions.

  2. Select the discussion you wish to delete and click **More** > **Delete** .

     A confirmation message appears. Click **Delete** to delete the selected discussion, including all replies.

Delete discussions for other users

> Note:
>
> You can only delete discussions for other users if your administrator has configured the delete option for your group and role.

1. Search for the object containing the discussion you want to delete.

2. Select the object and click **Discuss** on the primary toolbar to display the **Discuss** panel and its discussions.

3. Select the discussion you wish to delete and click **More** > **Delete** .

   A confirmation message appears. Click **Delete** to delete the selected discussion, including all replies.

View followed discussions in the Discussions location

The **Discussions** location changes depending on whether the tracked discussion feature is enabled:

- When tracked discussion is not enabled, the **Discussions** page displays all followed discussions.

- When tracked discussion is enabled, the **Discussions** page displays two tabs: **Feed** and **Tracked**.

> Note:
>
> By default, tracked discussions is disabled. Contact your administrator to enable this.

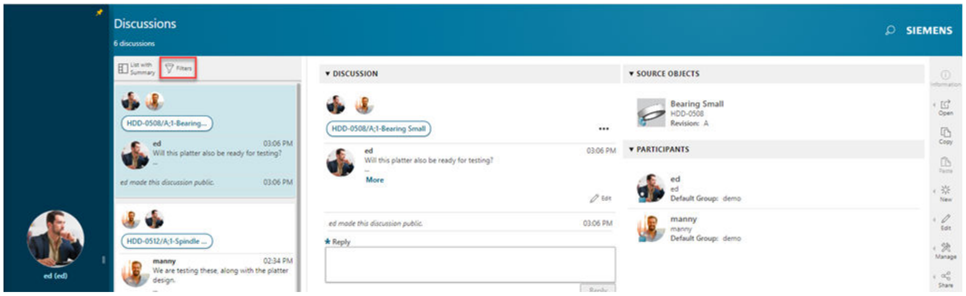
View followed discussions with the tracking disabled

To view followed discussions:

1. Click either **Discussions** on the global navigation bar or the **DISCUSSIONS** tile on your home page.

   The most recent discussion is highlighted.

   The selected discussion appears in the **DISCUSSION** section where you can reply to the discussion.



2. Click **Filters** to filter on the following:

   - **Participants**
   - **Private**
   - **Created Before**
   - **Created After**

View followed discussions with the tracking enabled

1. Click either **Discussions** on the global navigation bar or the **DISCUSSIONS** tile on your home page. The **Discussions** page is displayed with two tabs:

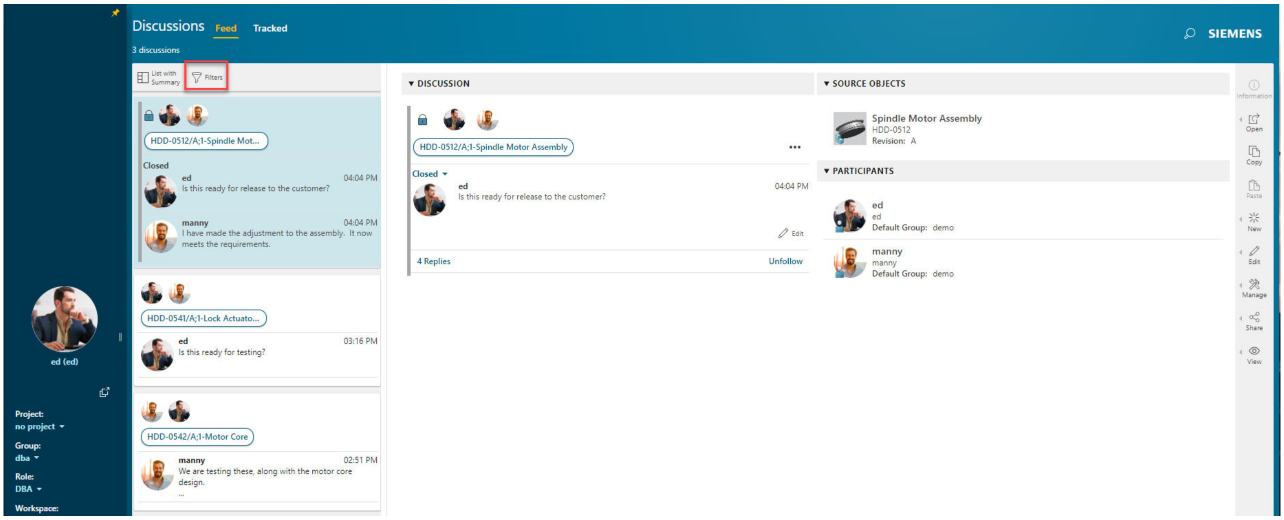
   - The **Feed** tab displays all discussions being followed, starting with the most recent discussion.

     The selected discussion appears in the **DISCUSSION** section where you can reply to the discussion.

   - The **Tracked** tab only displays followed discussions that are set as tracked discussions starting with the most recent tracked discussion.

     The priority can be **Low**, **Medium**, or **High**. The status can be **Open** (blue bar), **In Progress** (green bar), or **Closed** (gray bar).

   The most recent discussion is highlighted.



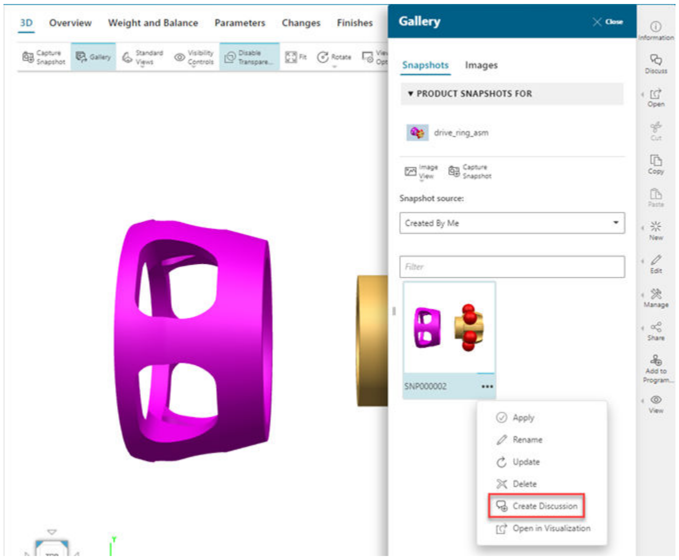
2. Click **Filters** to filter on the following:

- **Participants**
- **Private**
- **Priority** (Appears only when tracked discussions is activated.)
- **Status** (Appears only when tracked discussions is activated.)
- **Created Before**
- **Created After**

Creating discussions containing snapshots

What are snapshots?

Snapshots capture the 3D data associated with a product. This is done by loading the product in the 3D viewer and taking a snapshot. Snapshots allow you to share 3D data and collaborate with other users and business stakeholders. You can share a snapshot created by you with other users in a discussion. This enables others to collaborate about what is happening in the view where the snapshot was taken.



What must I have in place to create or view discussions containing snapshots?

Before you can create or view discussions containing snapshots, ensure you have:

- Teamcenter lifecycle visualization installed.
- Snapshot discussion enabled. If disabled, your administrator can enable this.
- Two access control lists (ACLs) configured by your administrator.

Where are snapshots located that I can use in discussions?

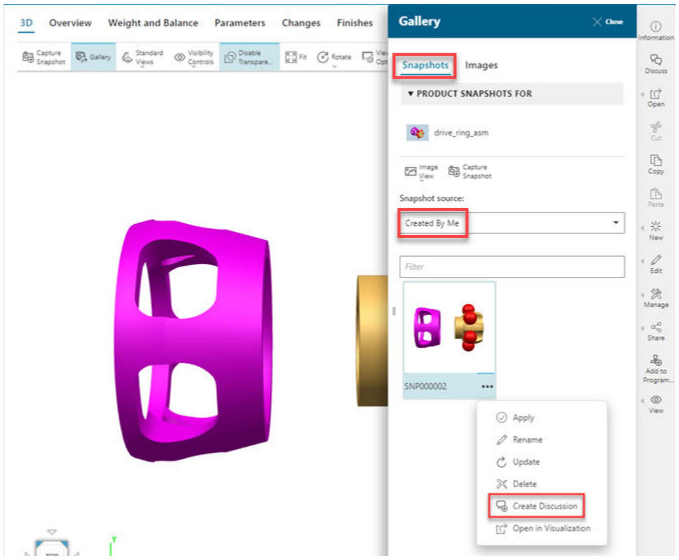
You can start a discussion for a snapshot from wherever your created snapshots are located in Active Workspace, for example:

- The **MY GALLERY** tile on your home page.
- The **3D** view > **Gallery** tab on the work area toolbar.

The capture a snapshot functionality is also available while creating a discussion and the **3D** tab is open.

Create a discussion and share a snapshot either from Gallery or from My Gallery

You can select a snapshot to share in your discussion either from **Gallery** or from the **MY GALLERY** tile on your home page. Once a discussion is created for a snapshot, the **Create Discussion** option on the snapshot is replaced with **Open Discussion**.



1. Select an object, for example, **drive_ring_asm**.

2. Open the object.

3. Select **3D** to load the assembly in the 3D viewer.

4. Click **Gallery**.

5. Select the **Created By Me** view.

6. Select the snapshot which you wish to share and click ▫▫▫.

7. Select **Create Discussion** to create a discussion on the snapshot.

8. (Optional) Click the **Add Source** ⊕ to add an additional source object to the discussion.

9. Click **Add Participant** ⊕ to add one or more participants to the discussion. Select the participant and click **Add**.

   One or more participants is required when sharing a snapshot in a discussion.

   The snapshot is shared with the participants you add to the discussion.

10. (Optional) Click the **Private Message** box to restrict access to the discussion to limit it to the list of participants.

    If the **Private Message** box is not selected, users viewing the discussion can see the discussion message text, but cannot see the snapshot shared in the discussion.

    Private messages appear with a lock icon.

11. (Optional) Click the **Tracked** box to track the status and priority of a discussion. By default, the status is **Open** and the priority is **Low**. You can set the priority (**Low**, **Medium**, or **High**) using the drop-down list.

    This feature must be configured by your administrator. If this feature is not enabled, the **Tracked** check box is not displayed.

12. Type your message in the **Message** field.

13. (Optional) Click **Remove Snapshot** to remove the snapshot from the discussion. Although the snapshot is removed from the discussion, it is not removed from the system. It is still available from the **Created By Me** view in both **Gallery** and from the **MY GALLERY** tile on your home page.

14. Click **Create** to create the discussion on the object.

    The new discussion appears on the **Discuss panel**.

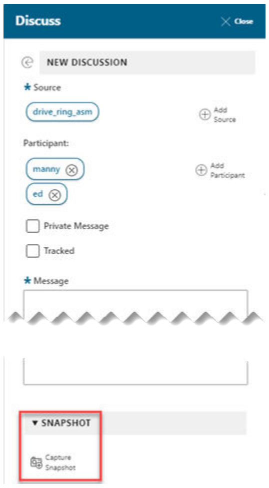
    It also displays in the **Discussions location**. Click either **Discussions** on the global navigation bar or the **DISCUSSIONS** tile on your home page to view your new discussion.

    Each discussion has a timestamp and new discussions appear at the top of the list. As the creator of the discussion, you are automatically set to follow all replies in the new discussion.

To view a discussion for a particular snapshot, choose the snapshot from either **Gallery** or from the **MY GALLERY** tile on your home page and select **More Commands** > **Open Discussion**.

Capture a snapshot from the Discuss panel when creating a new discussion

You can use **Capture Snapshot** to capture a snapshot from the **3D** view to include it in your discussion.



1. Select an assembly object.

2. Open the object.

3. Select the **3D** view to display the 3D image.

4. Click **Discuss** on the primary toolbar to display the **Discuss** panel.

   If there are existing discussions on the object, these discussions are visible.

5. Click **New Discussion** to begin a new discussion on the selected object.

6. (Optional) Click the **Add Source** to add additional source objects to the discussion.

7. Click **Add Participant** to add one or more participants to the discussion. Select the participant and click **Add**. Note that participants in a discussion automatically follow the discussion.

   One or more participants is required on a discussion where you are sharing a snapshot.

8. (Optional) Click the **Private Message** box to restrict access to the discussion and limit it to the list of participants.

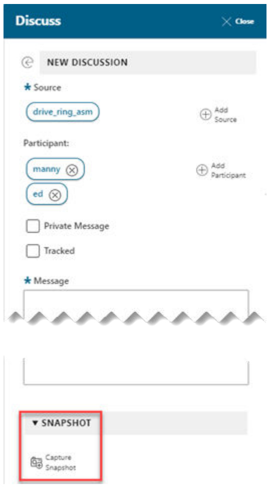
   When created, private messages appear with a lock icon.

9. (Optional) Click the **Tracked** box to track the status and priority of a discussion. By default, the status is **Open** and the priority is **Low**. You can set the priority (**Low**, **Medium**, or **High**) using the drop-down list.

   This feature must be configured by your administrator. If this feature is not enabled, the **Tracked** check box is not displayed.

10. Type your message in the **Message** field.

11. To include a snapshot in this discussion, click **Capture Snapshot** in the **SNAPSHOT** area. This creates a 3D snapshot in the **Discuss** panel. The snapshot is also added to **Gallery** on the work area toolbar and to the **MY GALLERY** tile on your home page.



(Optional) Click **Remove Snapshot** to remove the snapshot from the discussion. Although the snapshot is removed from the discussion, it is not removed from the system. It is still available from the **Created By Me** view in both **Gallery** and the **MY GALLERY** tile on your home page.

12. Click **Create** to create the discussion on the object.

    The new discussion appears on the **Discuss panel**.

    It also displays in the **Discussions location**. Click either **Discussions** on the global navigation bar or the **DISCUSSIONS** tile on your home page to view your new discussion.

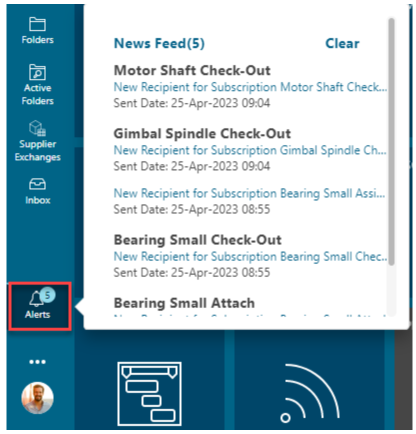
    Each discussion has a timestamp and new discussions appear at the top of the list. As the creator of the discussion, you are automatically set to follow all replies in the new discussion.

To review discussions for a particular snapshot, choose the snapshot and select **More Commands** > **Open Discussion**.

Using Subscriptions

What are subscriptions?

Subscriptions are objects you are following using the **Follow** command. When these objects you are following are changed, for example, when your data is modified by another user or as the release status of an item revision changes, you receive notifications in near real time using external email, news feed, or both. In addition to these notifications, an **Alerts button** on the global navigation bar notifies you when subscription notifications are received.



Basic concepts

Use the Subscription feature in Active Workspace to be notified of events, such as:

- An item or item revision is checked in or checked out (site or remote) or canceled.
- An item is modified or deleted.
- New subscription recipients.

Follow and unfollow objects

You can subscribe to follow one or multiple objects at a time. When you no longer need to subscribe to an object, you can unfollow the object.

Follow one or multiple objects

1. Select one or more objects to follow and click **Share** > **Follow** from the primary toolbar.

   When selecting a *single* object, the **Follow** pane is displayed listing the default event types (**Assign Status**, **Attach**, and **New Item Revision**).

   When selecting *multiple* objects, the event type list displays the event types common to all selected objects. The number of objects to which you can subscribe at one time is configured by your administrator.

2. Select which event type you want to follow, the frequency, and the priority. You can also add other users as followers.

   a. Click **Edit** next to the **My Events** check box to view your selected events and the available events.
   b. From **AVAILABLE EVENTS**, select an event from the event list and click **Add to selected events**.

> Note:
>
> If you are already subscribed to an event type, that event type does not appear in the **AVAILABLE EVENTS** list.

c. Click **CONFIGURE MY EVENTS**.

  a. (Optional) Edit the object name.

  b. From **Frequency**, select from **Immediately** (not collated), **Daily** (daily digest), and **Weekly** (weekly digest). The default is **Immediately**.

  c. From **Priority**, select from **Normal**, **High**, and **Low**. The default is **Normal**.

  d. (Optional) In the **FOLLOWERS** section, click **Add Follower** ⊕ to find a user to add as a follower. The **USERS** section filters as you type; type the first few characters of the user's name to display the user you want. Then, select the user by their group and role and click **Add**. You can add multiple followers.

     When you unfollow the object, any followers you added will be unfollowed. Also, any followers you add to an object can unfollow the object at any time.

  e. Once your selections are complete, click **Follow** to subscribe to the object.

To verify your subscription was created, click the **SUBSCRIPTION** tile on your home page. Your subscription appears in the **My Subscriptions** tab.

Unfollow a subscription on an object in the My Subscriptions tab

1. Click the **SUBSCRIPTION** tile on your home page.

2. Select the **My Subscriptions** tab.

3. Select the subscription you want to unfollow and do one of the following:

   - From the list of subscriptions, click **Unfollow**.
   - From the **FOLLOWERS** area, click **Unfollow**.

   Both you and any followers you added to the subscription will no longer follow the object.

4. From the confirmation dialog, click **Unfollow**.

Unfollow a subscription on an object in the Added As Follower tab

1. Click the **SUBSCRIPTION** tile on your home page.

2. Select the **Added As Follower** tab.

3. Select the subscription you want to unfollow and do one of the following:

    - From the list of subscriptions, click **Unfollow** .
    - From the **FOLLOWERS** area, click **Unfollow**.

    Only you will be removed as a follower. The user who added you as a follower on the object will continue to follow the object.

4. From the confirmation dialog, click **Unfollow**.

Follow an object type

You can follow an object type, for example, **Item** or **ItemRevision**.

1. Click a subscription on the **My Subscriptions** page.

2. Select **Share** > **Follow Type** .

3. In the **Follow Type** panel, select an event type from **Other** you want to follow. Then, select the frequency and the priority. You can also add other users as followers.

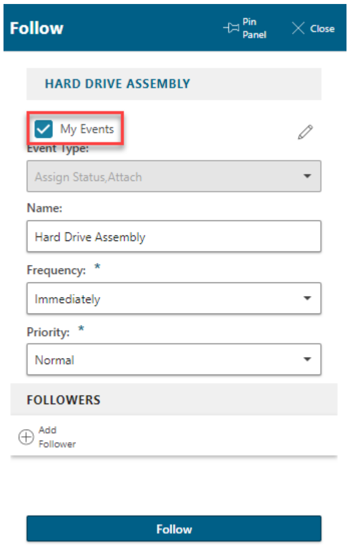
4. Click **Follow**.

Follow multiple events on an object

You can use the **My Events** list to follow multiple events on an object. However, the number of objects to which you can subscribe at one time is configured by your administrator.

1. Select an item revision, for example, Hard Drive Assembly, **HARD DRIVE ASSEMBLY**, and click **Share** > **Follow** .

    The **My Events** check box is displayed.



2. Click **Edit** to the right of the **My Events** check box to view selected events and available events.

   Three events, **Assign Status**, **Attach**, and **New Item Revision**, are configured by default.

3. To add additional events to follow, you can scroll through the **AVAILABLE EVENTS** list and select additional events to follow. Click **Add to selected events**.

4. Once you have a selected list of events to follow, click back.

5. Select the **My Events** check box to follow all the configured events and click **Follow**.

   If an event type, such as **New Item Revision**, does not appear in the **Event Type** list, it is because it is not applicable for the selected object. Also, any non-applicable and already-subscribed-to events are filtered out.

Filter your news feed notifications

From the **News Feed** tab on the **Subscriptions** page, you can filter your news feed notifications to easily access the notifications you want to view.

When notifications are available, the **Filters** panel is open by default. Once you close the **Filters** panel in a session, it remains closed for that session.

1. Click the **SUBSCRIPTION** tile.

2. From the **Subscriptions** page, click the **News Feed** tab to display your notifications.

3. With **News Feed** selected, click **Filters** to display the **Filters** panel displaying categories of subscription notifications, such as: **Message Type** (for example, Print and Subscription Manager) and **Event** (for example, Check-In and Print Complete).

4. Select from the different categories. For example, by selecting **Subscription Manager**, you only see notifications pertaining to Subscription Manager.

5. To save your filter selection for later use, click **Save Filter Selection**. Notifications from the saved filter are loaded when the News Feed location is loaded from the **SUBSCRIPTION** tile.

   To modify the saved filter selection, change the filter selection and save it.

Modifying your subscriptions

Add followers to your subscriptions

You can add additional followers to one of your existing subscriptions from the **SUBSCRIPTION** tile on your home page.

1. Click the **SUBSCRIPTION** tile.

2. From the **Subscriptions** page, click the **My Subscriptions** tab to display your existing subscriptions.

3. Select the subscription you want to add additional followers.

   Notice that your name already appears in the table in the **FOLLOWERS** section of the **Overview** tab of the item to which you have subscribed.

4. Select **Edit** > **Start Edit** .

5. In the **FOLLOWERS** section, click **Add Follower** to display the **Followers** panel.

6. Type the first few characters of the user's name in the **Followers** field to display the user you want to follow your subscription.

7. Select the user by their group and role and click **Add**.

   You can add multiple followers.

8. Select **Edit** > **Save Edits** to save the followers displayed in the **Followers** table.

   The user you added as a follower can now view their new subscription by clicking the **Added As Follower** tab on the **Subscriptions** page.

Add an expiration date to your subscriptions

You can add an expiration date to each of your subscriptions if your administrator enabled the expiration date feature.

1. Click the **SUBSCRIPTION** tile.

2. From the **Subscriptions** page, select a subscription from your **My Subscriptions** tab.

3. Select **Edit** > **Start Edit** to edit the **PROPERTIES** area. Add an expiration date for the desired subscription.

   Note:

   If you want to change your subscription to inactive, clear the **Is Active** check box.

4. Select **Edit** > **Save Edits** to save your changes.

Change the owner of your subscription

You can change the owner of your subscription. This is helpful if you are leaving the project or the company.

1. Click the **SUBSCRIPTION** tile.

2. From the **My Subscriptions** tab, select a subscription and click **Manage** > **Change Owner**.

3. Select the new owner from the **Change Owner** panel, and click **Transfer**.

   This immediately removes the subscription from your **My Subscriptions** list.

Temporarily transfer notification of your subscriptions

You can temporarily transfer notification of your subscriptions. This is especially helpful if you are going to be out of the office for a period of time. You can select a coworker to take over as owner of the subscription during that time.

1. Click the **SUBSCRIPTION** tile.

2. From the **My Subscriptions** tab, select a subscription and click **Share** > **Transfer Notification**.

3. From the **Transfer Notification** panel, select the start and end dates for the transfer notifications and add a follower as a temporary notifier.

4. Click **Transfer** to save your changes.

   The following fields in the **PROPERTIES** section are updated:

   - **Temporary Notifier**
   - **Temporary Notification Start Date**
   - **Temporary Notification End Date**

Personalizing Subscription

Set your subscription notification method and retention time

You specify how yo want to receive your subscription notifications and specify how long your notifications are retained.

Use the **SUBSCRIPTIONS** area on your **Profile** page to:

- **Set your subscription notification method.**

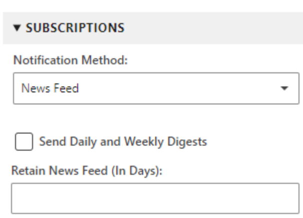
  You can receive your subscription notifications in near real time using either external email, news feed or both depending on your notification method.

- **Set your news feed retention time.**

  You can indicate whether you want to retain your news feed for a few days or if you want to always keep your news feed messages.

Set your subscription notification method

1. From your **Profile** page, select **Edit** > **Start Edit**.



2. From the **Notification Method** list, select one of the following notification methods:

   - **Email**
   - **News Feed** (default)
   - **Email and News Feed**

3. (Optional) Select the option of receiving daily and weekly digests that collate all notifications.

   These digests are available in both Active Workspace and rich client.

4. Select **Edit** > **Save Edits** to save your selections.

Set your news feed retention time

You can indicate whether you want to retain your news feed for a few days or if you want to always keep your news feed messages.

1. From your **Profile** page, select **Edit** > **Start Edit**.

2. In the **Retain News Feed (In Days)** field, enter the number of days you want to always keep your news feed messages.

   The default is to keep the news feed messages always and this is indicated by a blank field.

3. Select **Edit** > **Save Edits**.

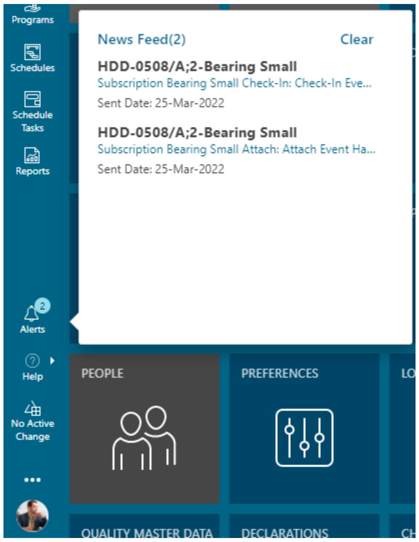
Using the Alerts button to view alerts

The **Alerts** button appears on the global navigation bar and notifies you when specific items have changed. A number indicator to the right of the **Alerts** button appears when notifications are received. If this button is not visible, your administrator has disabled it.

The pop-up shows various categories of alerts, such as:

- Print (indicating asynchronous print jobs are ready).
- News Feed (indicating a change has taken place on an object or activity to which you are subscribed).
- Document Management (indicating document rendering is complete or document property updates are complete).

You can click on the category on the pop-up, for example, **News Feed**, to see details on the notifications.



If you click an object, the target page for the object displays.

Note:

- When you click on a notification, the counter decreases by one (1).
- To clear all notifications on the pop-up list, click **Clear**.
- A maximum of 10 alerts is displayed per category.

View and delete notifications and subscriptions

To view your notifications and subscriptions, click the **SUBSCRIPTION** tile on your home page. From the **Subscriptions** page, use the following:

- **News Feed** tab to view and delete your *notifications*.
- **My Subscriptions** tab to view and delete *subscriptions* that you configured.
- **Added As Follower** tab to view and delete *subscriptions* to which you have been added as a follower.

7. Accessibility in Active Workspace

What is accessibility?

Active Workspace supports many accessibility features that make it more usable and accessible to users with physical and situational disabilities, such as blindness, deafness, learning disorders, motor disabilities, and temporary disabilities, like a broken arm or leg. Accessibility also takes into account other restrictions users may face, such as slow network speeds and bandwidth restrictions.

Accessibility in Active Workspace is based around four core principals:

1. **Perceivable.** Ensures that the Active Workspace user interface is presented in ways all users can perceive. This includes captions for videos, and **alternate text for images and icons**.

2. **Understandable.** Ensures that information is easily understandable by using clear and concise text, tooltips, and offering **navigation assistance** when needed.

3. **Operable.** Ensures that the Active Workspace functionality is available for multiple input methods and provides **keyboard-based navigation** and functionality for other input methods.

4. **Robust.** Ensures that content offers high usability to the widest variety of users, such as **easy table editing and saving of changes.**

Available accessibility features in Active Workspace

Keyboard navigation

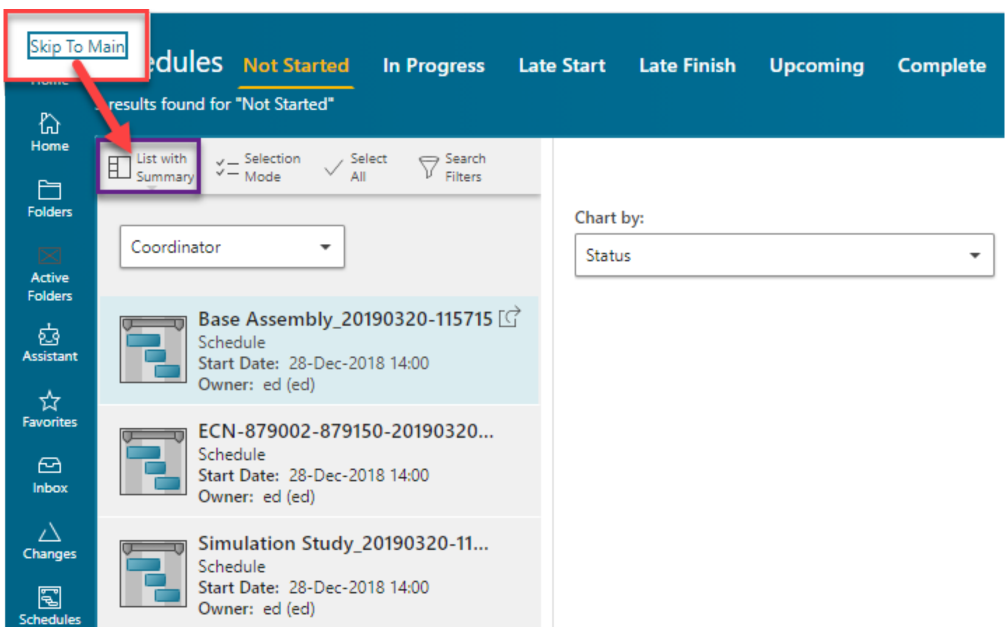
You can navigate the Active Workspace user interface using minimal keyboard keys, such as Tab, the Spacebar, the arrow keys, and Enter. As you navigate through the page, the areas highlight to show your location.

To	Do
Navigate forward in the Active Workspace user interface.	Press Tab. Each press moves you to the next item on the page.
Navigate backward in the Active Workspace user interface.	Press Shift + Tab. Each press moves you to the previous item on the page.
Open the selection.	Press Enter or the Spacebar.
Move between rows and cells in a table and tree views.	Use the arrow keys to move up, down, left, and right inside the table or tree view.
Select a table cell in table and tree views.	Press Enter or the Spacebar.

To	Do
Expand or collapse an element with child elements in the tree view.	Press Enter or the Spacebar.
Open an object from the table and tree views (if applicable).	Use the right arrow key to highlight the **Open** command and then press Enter or the Spacebar.
Navigate up and down a list of items or commands.	Use the up and down arrow keys. Alternatively, press Tab to move down the list and Shift + Tab to move up the list.
Select an item from a list of items or commands.	Press Enter or the Spacebar.
Close a list.	Press Esc. If multiple lists are open, the most recently opened list is closed first.

Skip to main section of the page

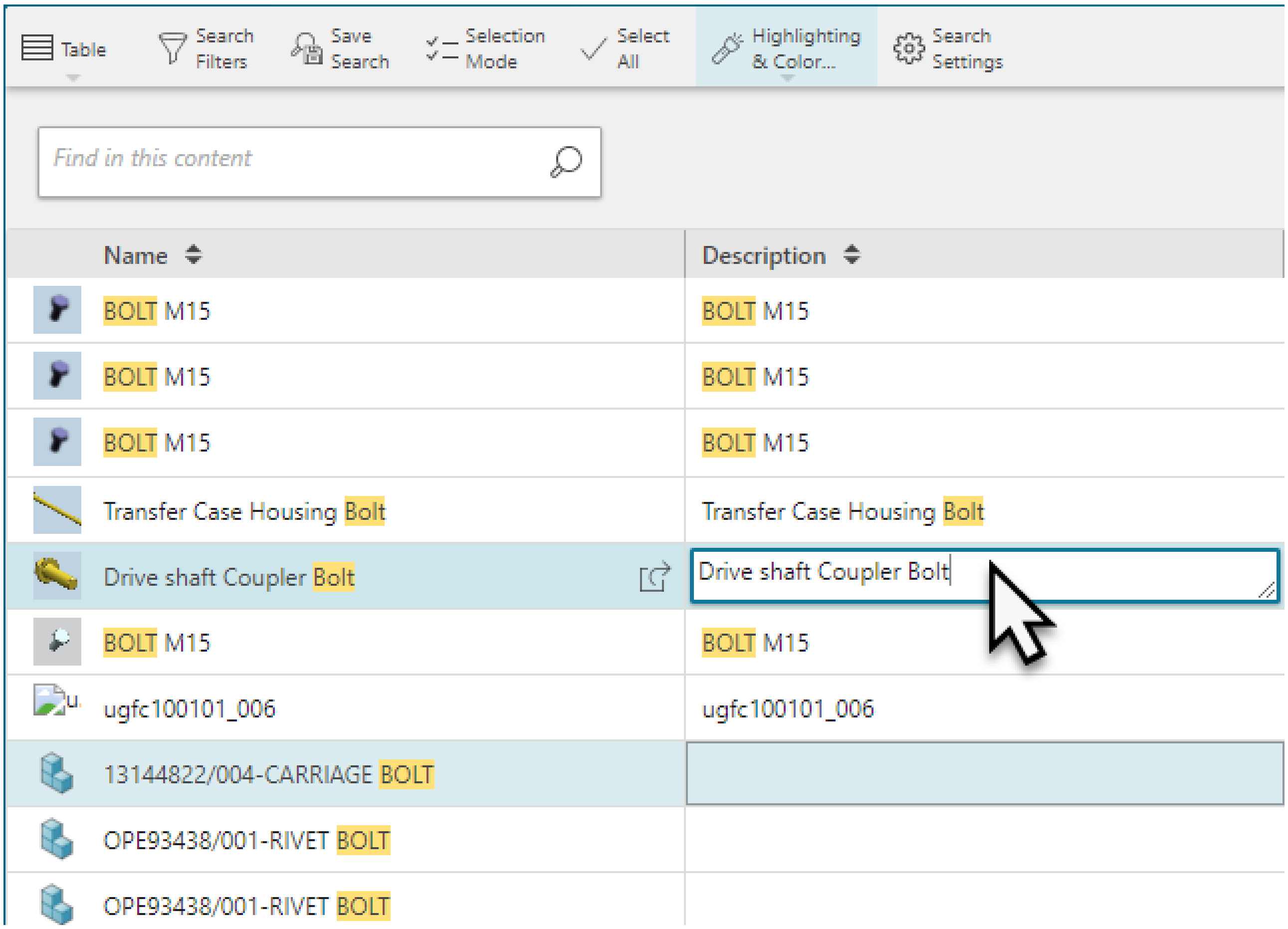
The first time you press the Tab key when using keyboard navigation in Active Workspace, a **Skip to main** option displays in the upper-left corner of the window. While this option is displayed, you can press the Enter key to bypass navigation to other areas and skip directly to the main work area.



Once in the main work area, you can continue to use the Tab key and the arrow keys as needed to navigate the interface.

Edit tables and auto save changes

Accessible table editing allows you to easily edit the data in table cells by double clicking the cell. Once the cell is in edit mode, you can make any necessary changes to it. When you click on a different cell, these changes are saved when you have **Autosave Tables** turned on.



Tip:

You can also place the entire table into edit mode by clicking **Edit**. When you are finished making changes, you must click **Save Edits** to save your changes.

Editing the properties of an item with a status of released

You can edit the properties of an item that is already released by double-clicking the property in the table. The **Released** flag is removed from the object. Edits are saved automatically when you move to another cell.

Alternate text for icons and images

Alternate text allows screen readers to convey image information to users with visual impairments. Active Workspace contains many command icons, thumbnails, indicators, and tiles that include alternate text. When you use a screen reader to read back the contents of the page, these elements are called out as images and buttons to give you clear idea on what is contained on the page.

> Note:
>
> The examples below are for informational purposes only. Your screen reader setup and the names of commands and indicators may be different from the default Active Workspace values for these objects.

- Commands, such as **Open**, and tiles, such as **INBOX**, are seen by screen readers as buttons.
  - When a screen reader is processing the **INBOX** tile on the home page, it reads this back as *Button, Inbox*.
  - When a screen reader is processing the **Open** command on the primary toolbar, it reads this back as *Button, Open*.
- Thumbnail icons for objects, your profile picture, and indicators are seen by screen readers as images.
  - When a screen reader is processing a thumbnail image of a hard drive assembly, it reads this back as *Image, hard drive assembly*.
  - When a screen reader is processing a release status indicator icon that shows an approved release on November 15th, 2020, it reads this back as *Image, Approved, 15-Nov-2020*.

8. Troubleshooting and auditing

Troubleshooting

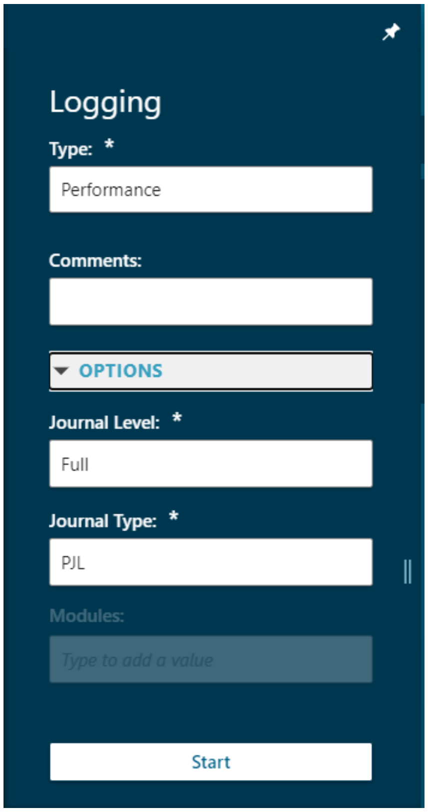
Record a problem in a log file to share with your admin

If you're having issues with Active Workspace, use this feature to record the problem in a log file to share with an administrator or someone else who can help you find a solution.

For example, if you're having performance issues:

1. Click the icon on the home page and choose the **Logging** command.

   The system displays the **Logging** panel.



2. Choose **Performance** for the **Type** of log.

3. Set the **Journal Level** value.

4. Set the **Journal Type** value.

5. Set the **Modules** for performances you want to record. You can choose more than one.

6. Click **Start**.

   The system begins recording the problem in a log file for your administrator.

> Note:
>
> Because this feature creates a lot of data, be careful not to over use it.

The ability to record problems in a log file enables you to:

- React more quickly, based on your observations.
- Capture the log while in the Active Workspace client.
- Avoid production server downtime for setting variables or collecting logs.
- Avoid impacting other logged-in users.

This is an optional feature you or your administrator can activate by setting two preferences:

Record a problem in a log file to share with your admin

- Turning on the **TC_reactive_logging_notification_list** preference notifies the administrator regarding the log ZIP file you want the administrator to review.
- Turning on the **TC_reactive_logging_file_download** preference displays a pop-up message to the administrator with a link to download the file in Active Workspace.

> Note:
>
> If you want your administrator involved, make sure these preferences are set. Otherwise, only you will receive the log file location and machine information.

Viewing audit logs

Using audit logs

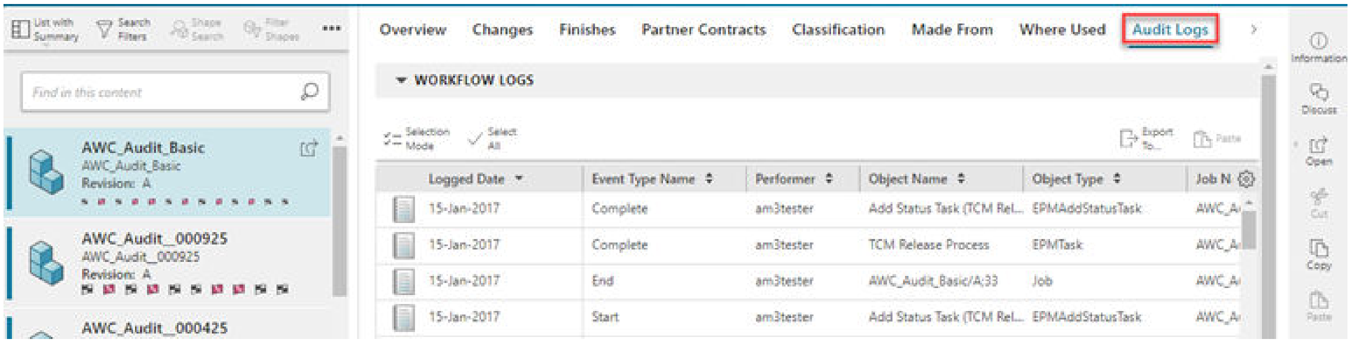
System administrators use Audit Manager to create audit logs. Audit logs track what information has changed and who has changed the information.

> Note:
>
> Your administrator must enable the **Audit Logs** page for Active Workspace. Also, you must have administrative privileges or you must be granted privileges to view audit logs.

In Active Workspace, you can view the following audit logs:

- **Audit - General Report**
- **Audit - General Sponsored Authentication Report**
- **Audit - File Access Read-Write Report**
- **Audit - File Access Report**
- **Audit - File Access Sponsored Authentication Report**
- **Audit - Security Report**
- **Audit - Schedule Report**
- **Audit - Organization Report**
- **Audit - Digital Signature Report**
- **Audit - License Change Report**
- **Audit - License Export Report**
- **Audit - License Export Sponsored Authentication Report**
- **Audit - License Change Sponsored Authentication Report**
- **Audit - Organization Sponsored Authentication Report**
- **Audit - Structure Sponsored Authentication Report**
- **Audit - Workflow Detailed Report**
- **Audit - Workflow Summary Report**
- **Audit - Workflow Attachment Report**
- **Audit - Workflow Signoff Report**

You can view audit logs using the **Audit Logs** tab in Active Workspace.



Audit project events and view assigned or removed data

You can audit **Project** events by activating the following out-of-the-box audit definitions.

- **TC_Project:Fnd0Assign_Data_To_Project**
- **TC_Project:Fnd0Remove_Data_From_Project**

You can view assigned or removed data from a project event in the **Security** section of the **Audit logs** tab in the **Project Summary** page.

You must configure the **Summary** style sheet for a specified workspace object to enable the out-of-the-box **Security Audit Logs** tab in the Active Workspace client, so the audit logs can be viewed.

For example, for showing the **ItemRev** summary, customize the **Audit Logs** display and configure the **Summary** style sheet for the **inject type** dataset.

```
<subRendering>
<page titleKey="tc_xrt_AuditLogs"
visibleWhen="{pref:TC_audit_manager_version}==3
   and {pref:AWC_show_audit_logs}==true">
    <inject type="dataset" src="WorkflowAuditLogs"/><break/>
    <inject type="dataset" src="GeneralAuditLogs"/><break/>
    <inject type="dataset" src="LicenseExportAuditLogs"/><break/>
    <inject type="dataset" src="SecurityAuditLogs"/><break/>
    <inject type="dataset" src="StructureAuditLogs"/>
</page>
</subRendering>
```