SIEMENS

Active Workspace 5.2

Active Workspace Fundamentals

AW002 - 5.2

Contents

Using the Teamcenter Assistant

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	
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2. Exploring the Active Workspace interface

Where can I run Active Workspace?

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

> Note:
>
> Your selected browser must support HTML5 and CSS3. For example, current versions of Microsoft Internet Explorer and Mozilla FireFox meet these requirements.

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

- With keyboard-enabled and mouse-enabled computers, you can use the left mouse button to select commands and objects.

  - 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

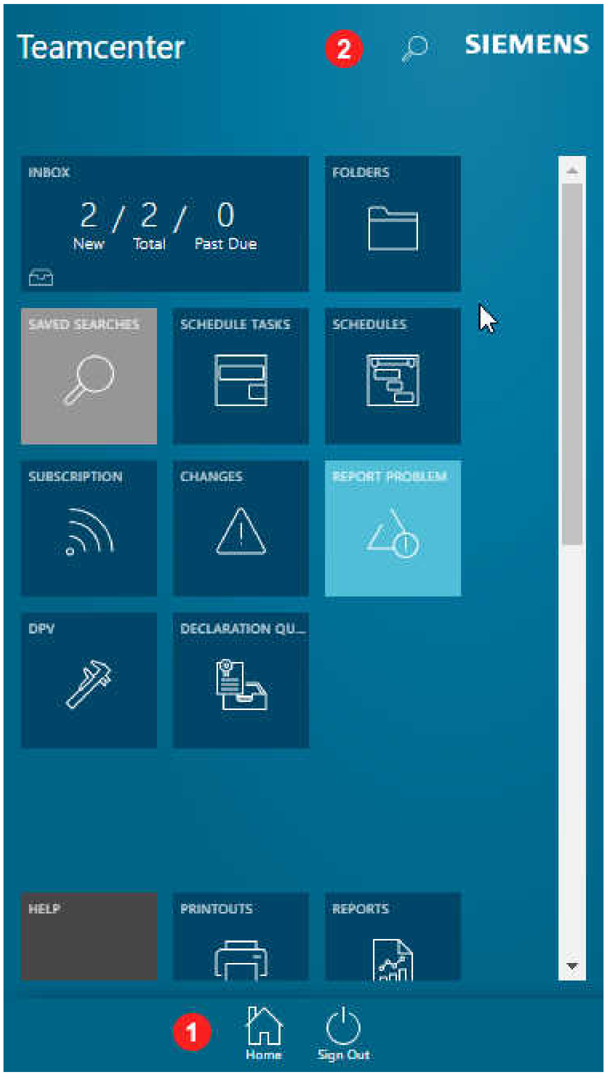
Active Workspace adapts to the available space, whether running on a computer monitor, tablet, phone, or within another application.

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

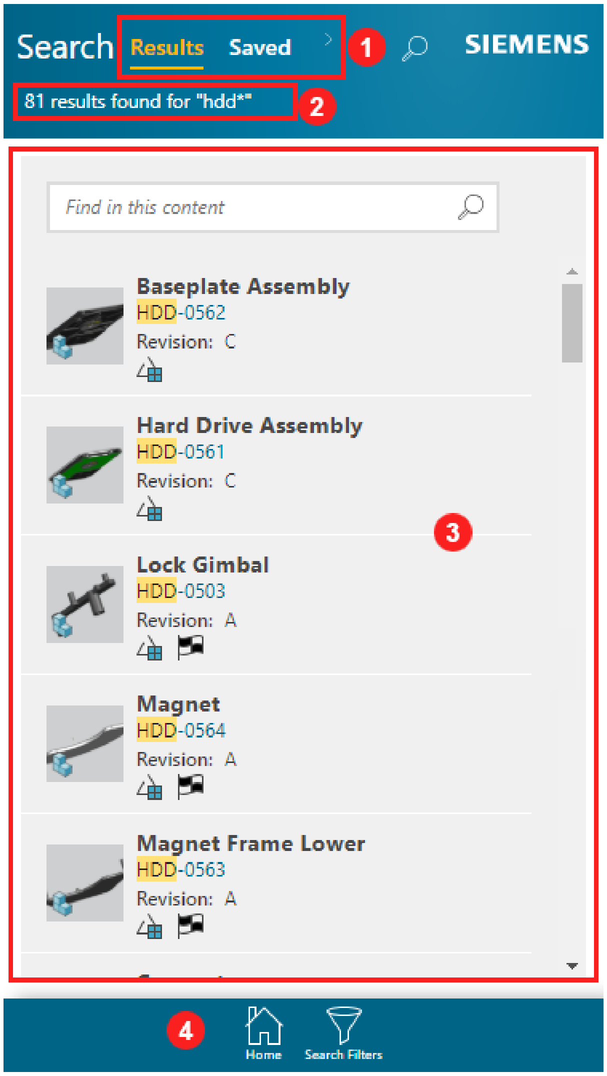
Displays the available commands, such as **Home** and **Sign out**. Other commands are available from other locations in Active Workspace.

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

2 Global search

Searching

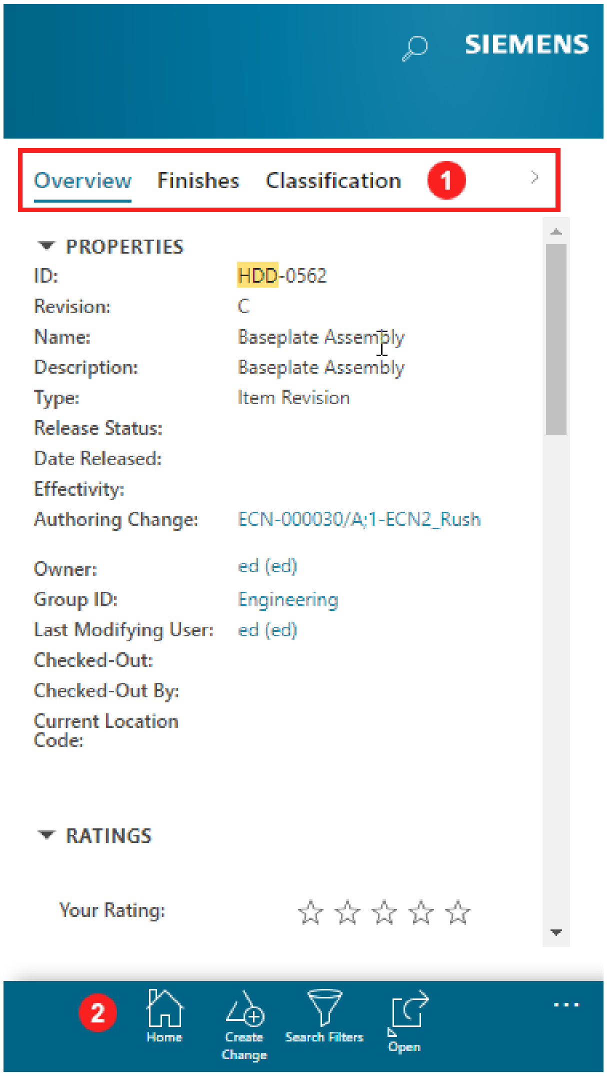
When you use search in the narrow interface, Active Workspace displays the list of search results.



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.

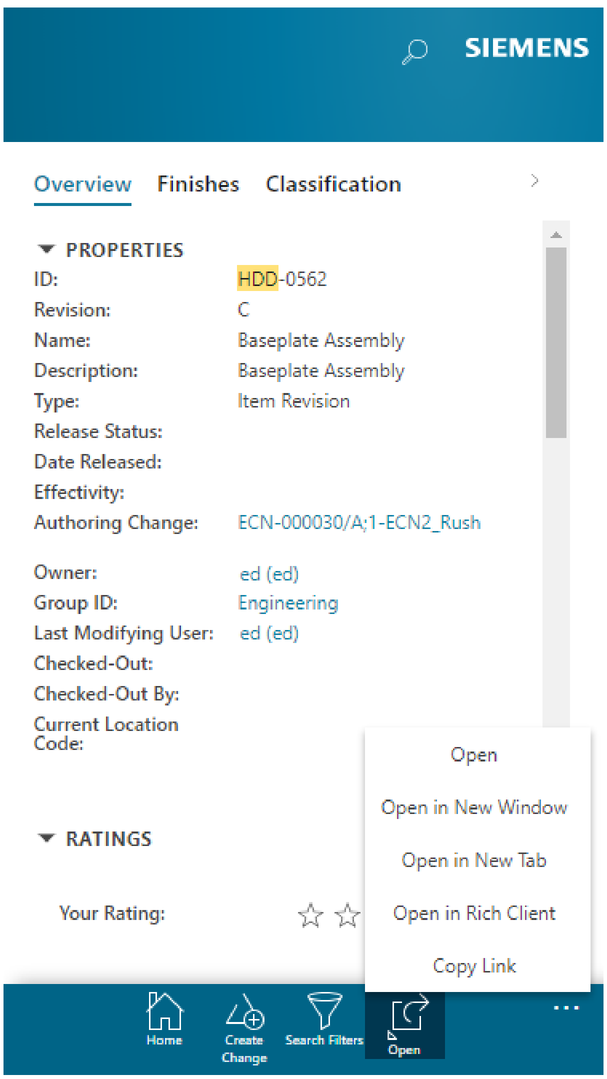
- Tap a partially displayed tab, indicated by ellipses, to fully display the tab and update the content area.

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.

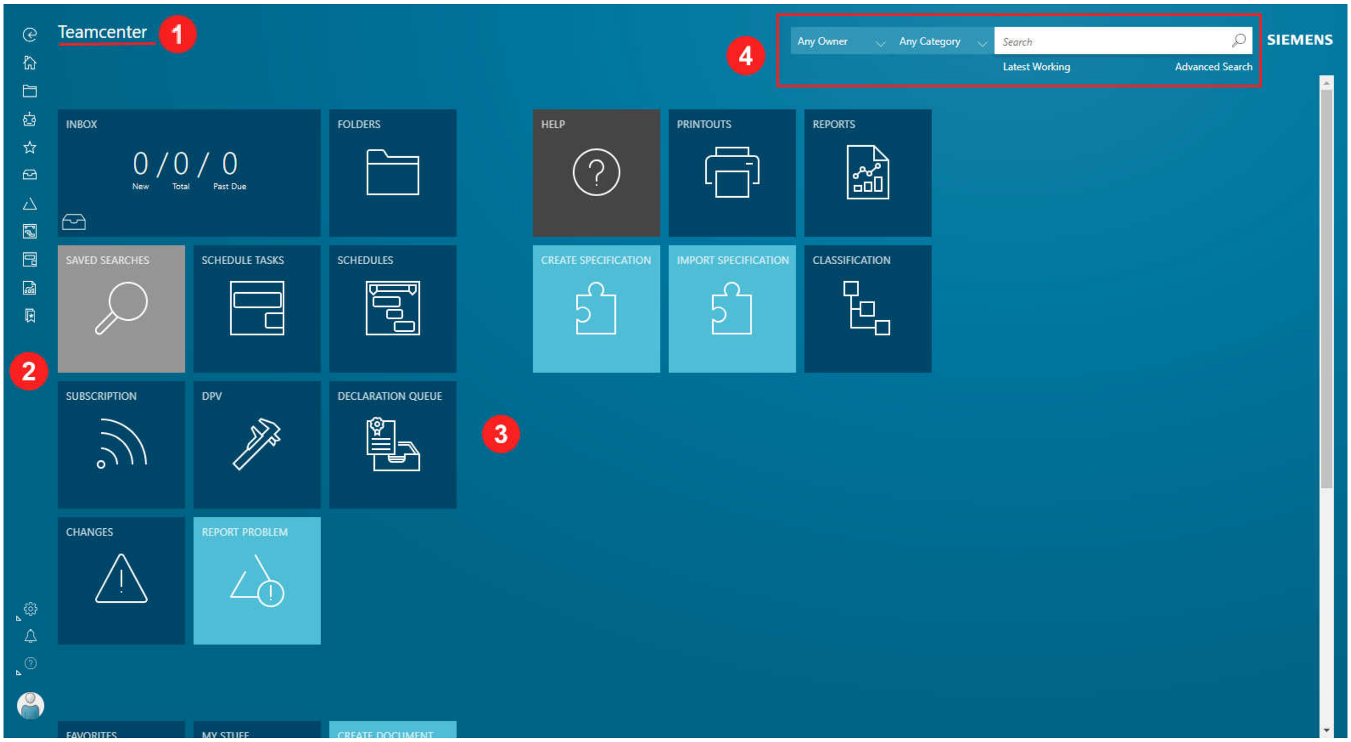


Choose **Open** to open the object in Active Workspace, or choose another option available on your device.

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.

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.

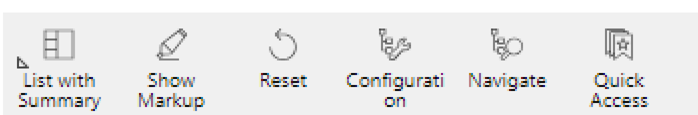
Quick Access: Quickly view objects you recently worked with, copied to the clipboard, or added to favorites.

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.

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.

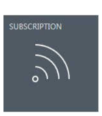
4 Global search

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.

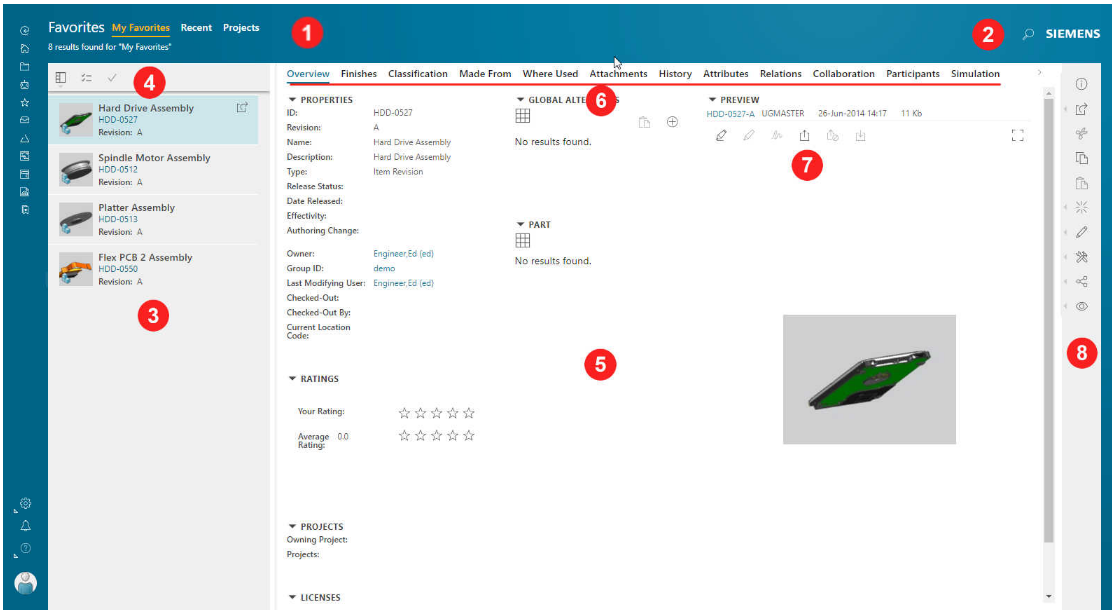
	Saved Searches	Provides access to searches you saved or pinned. Saved searches can be from global, quick or advanced searches.
	My Active Folders	Provides access to active folders that define searches which update automatically.
	Help	Provides access to online help files, if configured for your site.
	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.
	Questions	Shows the questions and responses for particular documents, parts, or other data.
	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.

Home page video

The following video familiarizes you with the Active Workspace home page.

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.

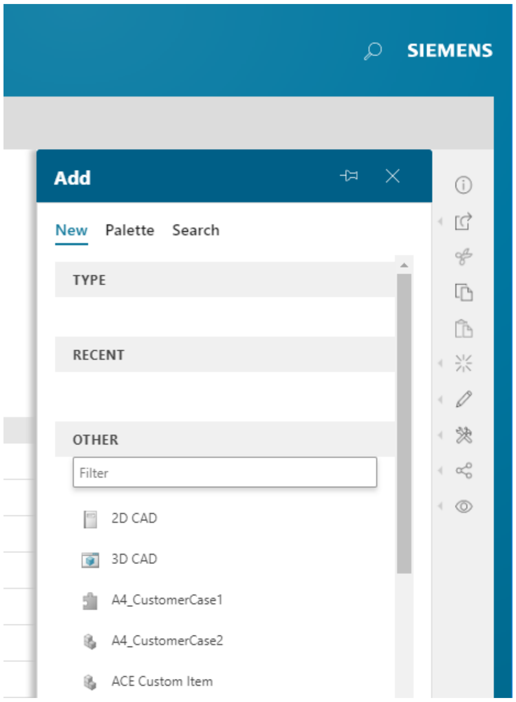
8 Primary toolbar

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 generate a task panel on the right side. Typically, these panels appears over the top of the information in the work area. Examples include **Add** panel, **Create Change** panel, and **Trace Link** panel.

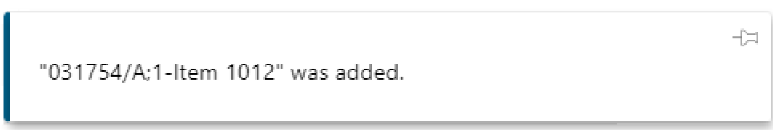


Other commands, such as search **Filters**, display a panel on the left.

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:

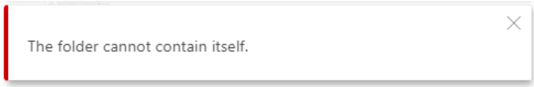


- To pin a notification message, click **Pin** (or anywhere in the message box).
- To unpin a notification message, click **Unpin** (or anywhere in the message box).

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.

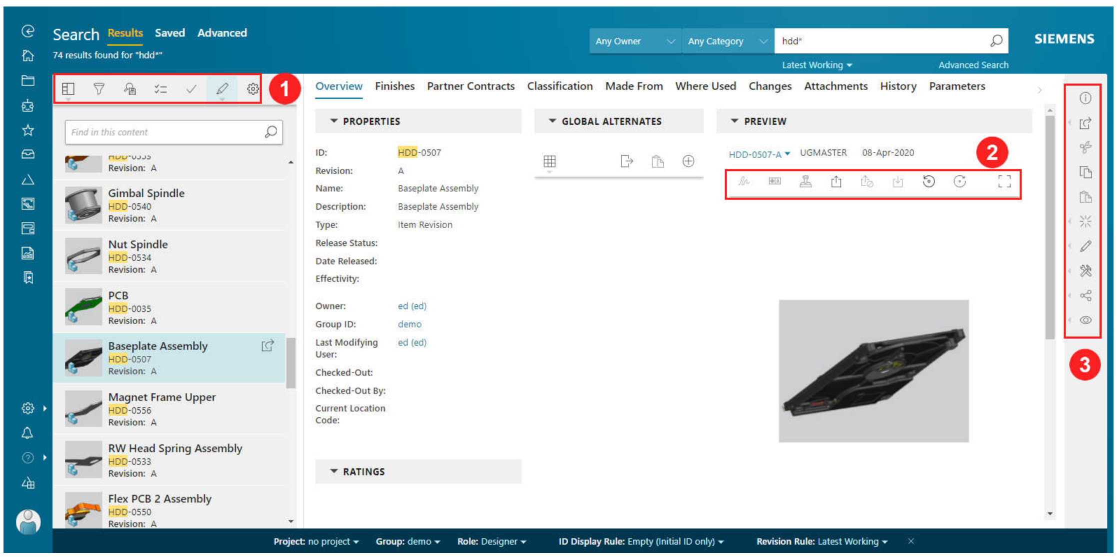
Example:



Error messages must be dismissed by clicking the ×.

Toolbars and commands

Active Workspace pages may include three different toolbars.



1 Results panel toolbar

2 Work area toolbar

3 Primary toolbar

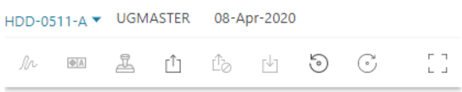
Results panel toolbar

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

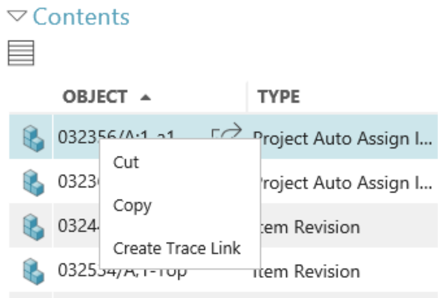
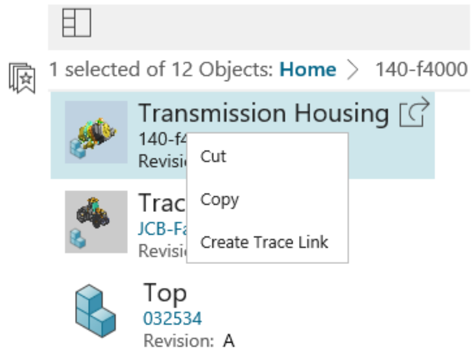
The primary toolbar includes commands associated with the data displayed on the page. As the data changes, the commands available in the toolbar change.

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

Command context menus

You can access some of these same commands with the context menus. Right-click on either items in a table or a list to access the commands.

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

Context menu for items in a table	Context menu for items in a list
	

Selecting and multiselecting objects

To select an object, click on it. The object is highlighted to indicate it is selected.

Selecting 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**.

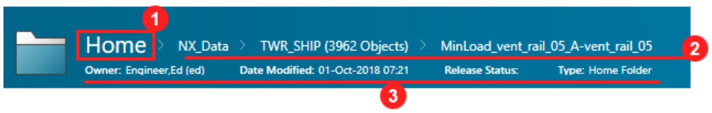
   - Click or touch any object to select it. Any previously selected objects are deselected.
   - Ctrl-click nonconsecutive objects to select them.

- Shift-click to select a range of objects.
- **Select All / Clear Selections** is not available without using **Selection Mode**.

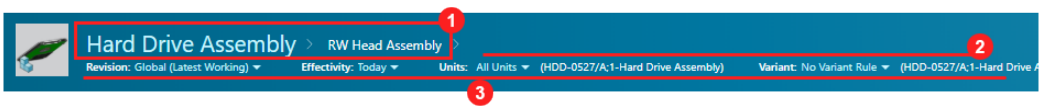
Header information

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.



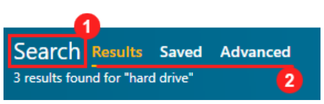
Header for an assembly.



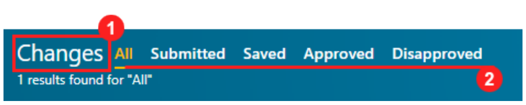
1	Location
2	Breadcrumb to display and navigate structure or hierarchy.
3	Additional information about the selected object.

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

Header for the **Home** folder.



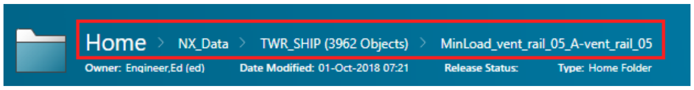
Header for an assembly.



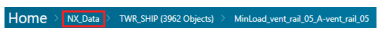
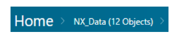
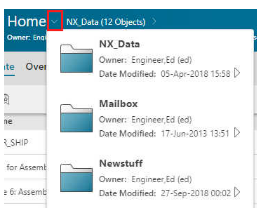
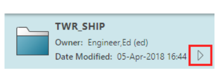
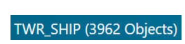
1	Location
2	Multiple pages for a location. Click each page to see additional information.

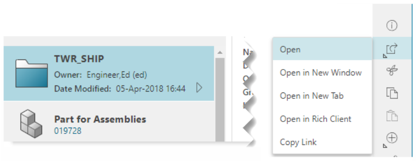
Navigating your workspace using breadcrumbs

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 dropdown list. The dropdown 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. 

To	Do this	Result
		

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** view 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

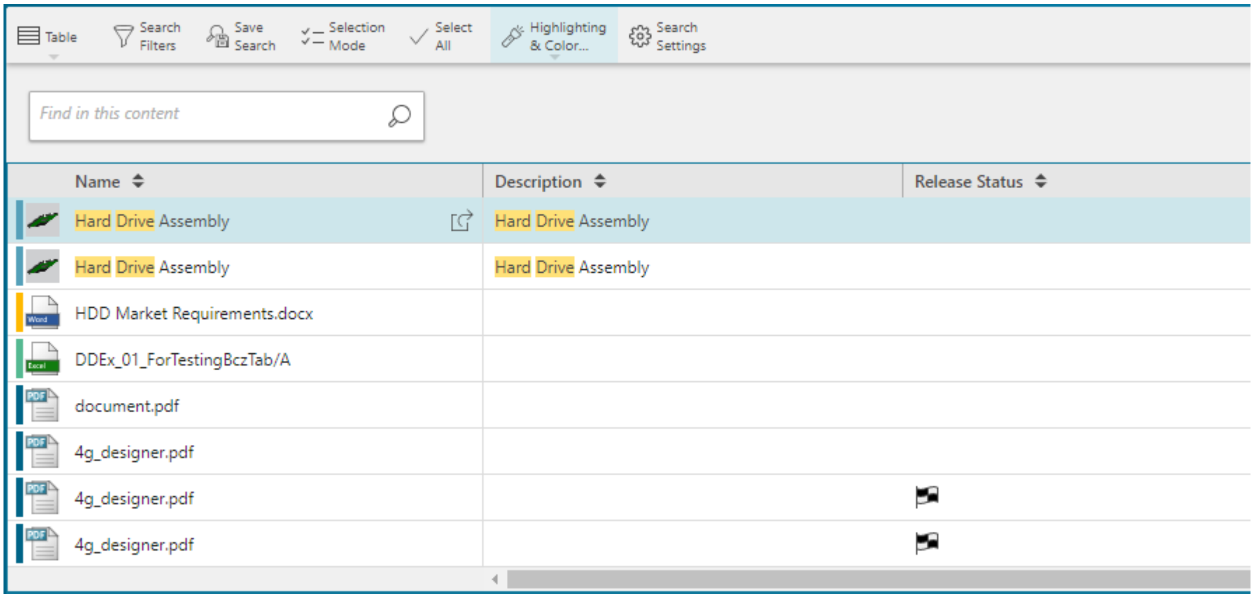
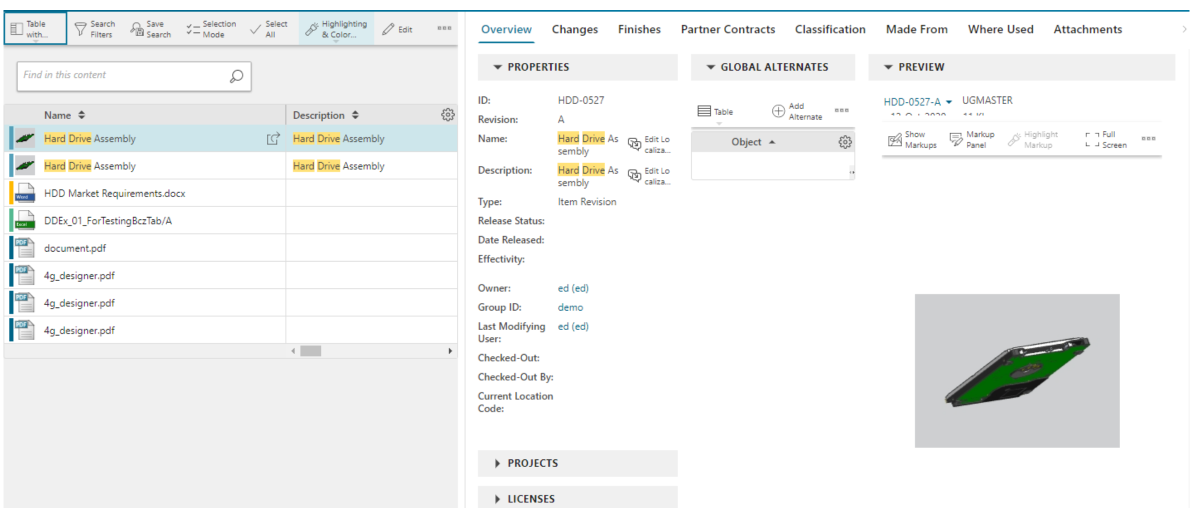


Table with Summary



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 contain 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.

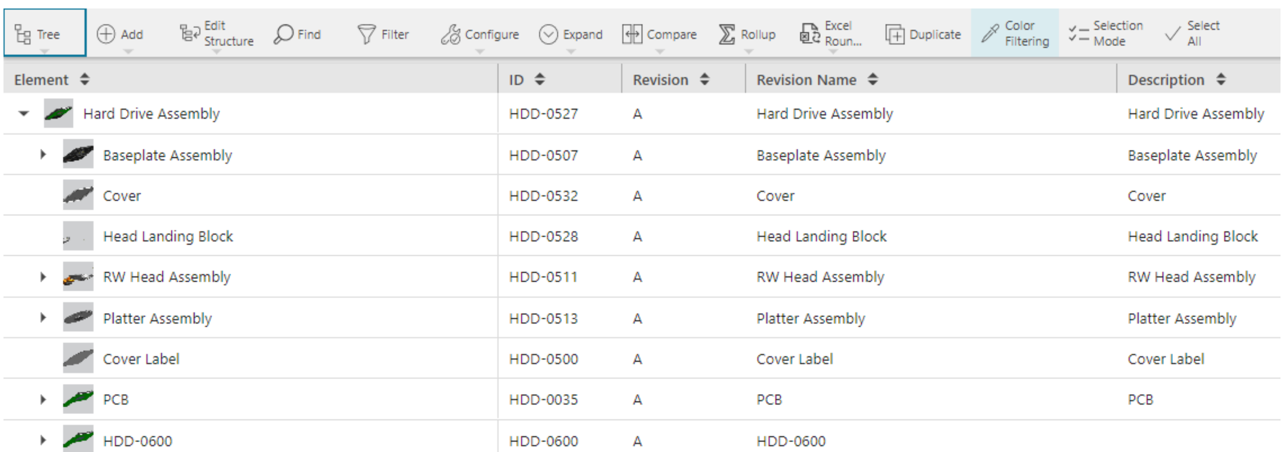
Display structures and folders in the tree view

The **Tree** view displays all elements of a structure or folder in a parent child relationship. When applicable objects contains 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.

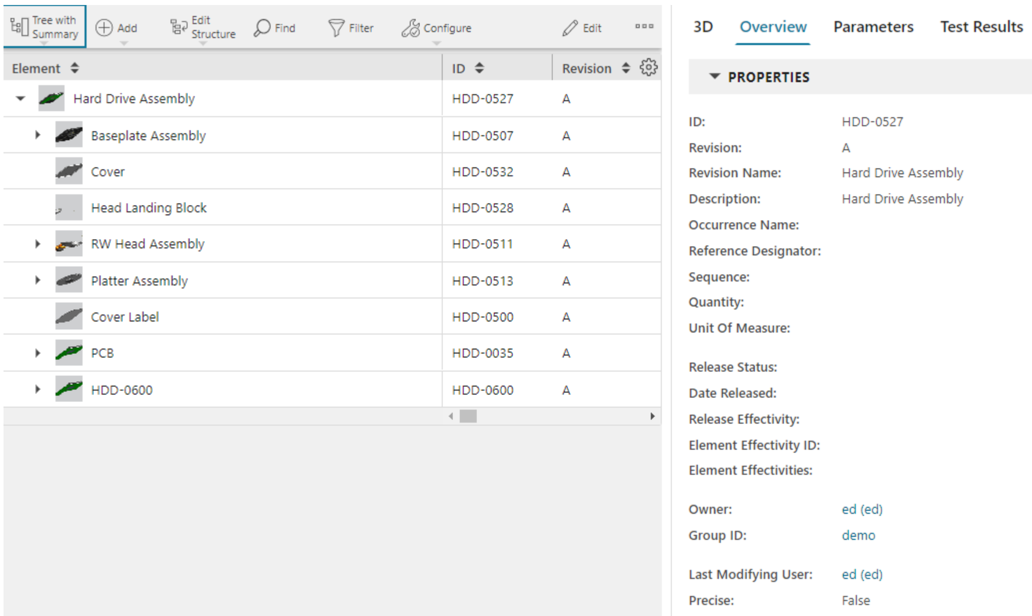
You can select between two types of tree views: **Tree** or **Tree with Summary**.

Tree view:

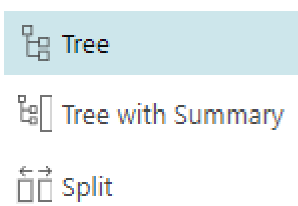


Element	ID	Revision	Revision Name	Description
Hard Drive Assembly	HDD-0527	A	Hard Drive Assembly	Hard Drive Assembly
Baseplate Assembly	HDD-0507	A	Baseplate Assembly	Baseplate Assembly
Cover	HDD-0532	A	Cover	Cover
Head Landing Block	HDD-0528	A	Head Landing Block	Head Landing Block
RW Head Assembly	HDD-0511	A	RW Head Assembly	RW Head Assembly
Platter Assembly	HDD-0513	A	Platter Assembly	Platter Assembly
Cover Label	HDD-0500	A	Cover Label	Cover Label
PCB	HDD-0035	A	PCB	PCB
HDD-0600	HDD-0600	A	HDD-0600	

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.

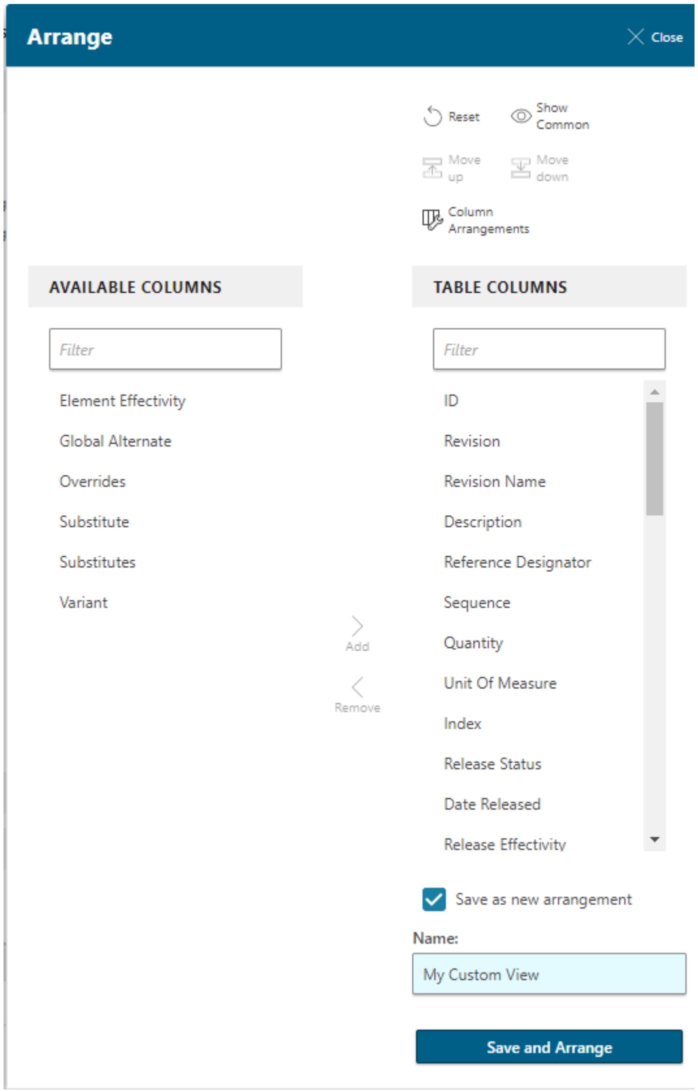
The Arrange panel contains the **AVAILABLE COLUMNS** that can be added to the table or tree and the **TABLE COLUMNS**, which are the columns currently displayed.

Tip:

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

Using the Arrange panel

Click to the right of the column headings to display the **Arrange** panel.



Reset

Returns the columns to the default order.

Show All / Show Common

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

Move up

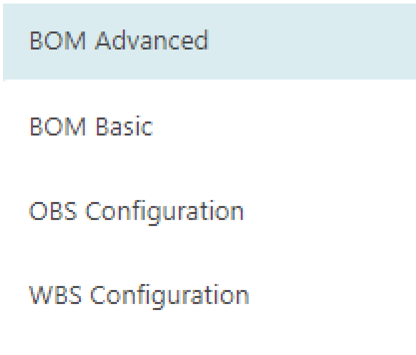
First click on a column name. Then click to alter the column order.

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 arrangements

When you have finished 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.

Modifying table and tree appearances

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

- Change column widths.
- Freeze and unfreeze columns.
- Modify the sort order.

Change column widths

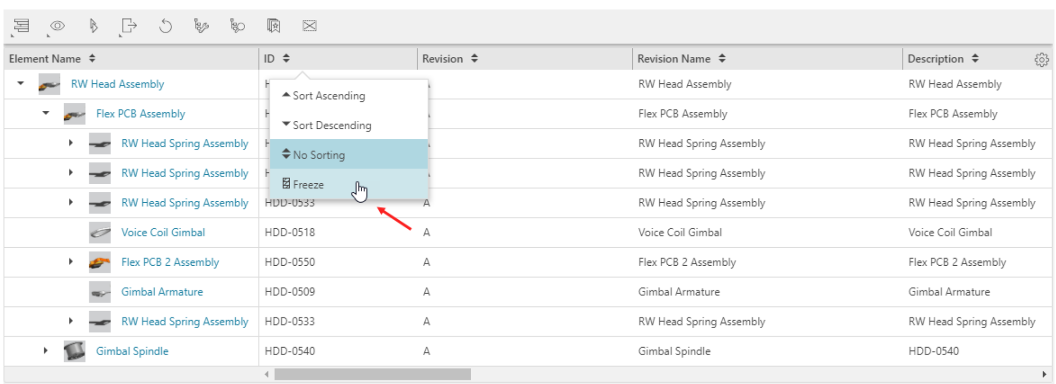
You can easily change the column widths for either **Table** or **Tree** views.

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.

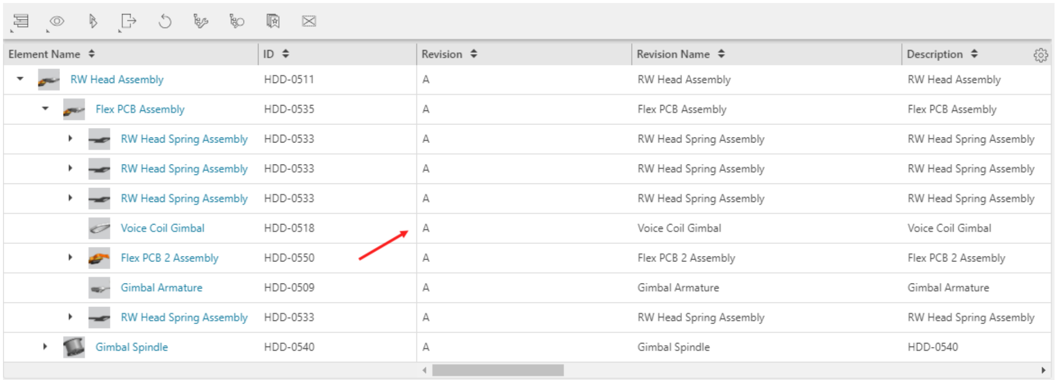
Freeze and Unfreeze columns

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.



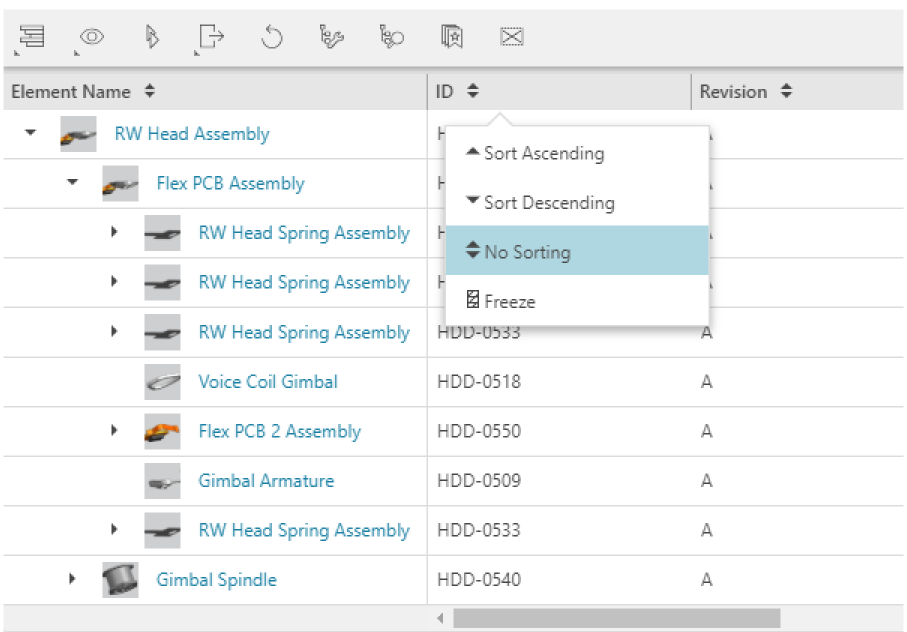
To unfreeze columns, click the column header and click **Freeze** again.

Note:

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

Modify the sort order

To modify the sort order on a table or tree column, click the column header and click the appropriate sort option.



Filtering data in a table column

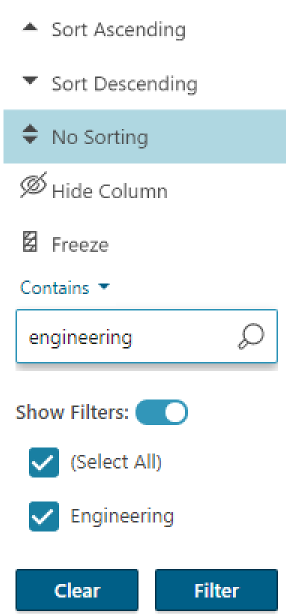
You can filter the data within a table column so you can easily see the data that is important to you.

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.

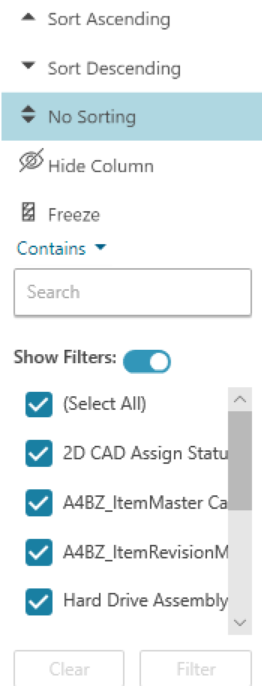
To access the filtering, click anywhere in the header of the table column to filter. There are four types of filters available depending on the types of data; text filtering, facet filtering, date filtering, and number filtering.

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



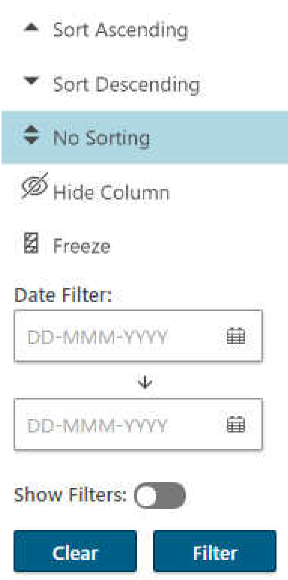
  - Do not use wild cards. Just enter a text string to filter on and click **Filter**.
  - You don't need to differentiate between upper and lower case.
  - When you enable facet filtering by clicking **Show Filters** for the column, Active Workspace automatically narrows the list of values as you type 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.



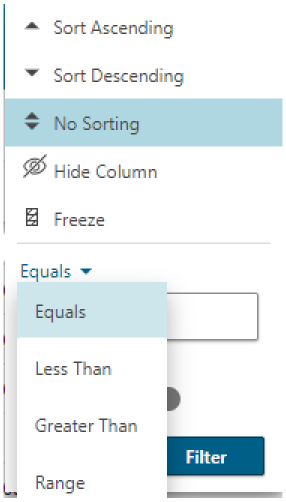
Click **Show Filters** to view the values for the table column. You can select the values you want to filter by, and then click **Filter** to show only the selected values.

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



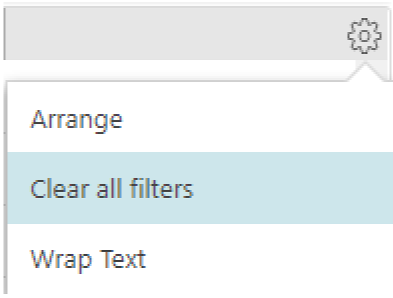
You can set a single date or a date range using the pop-up calendar.

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



To remove filters:

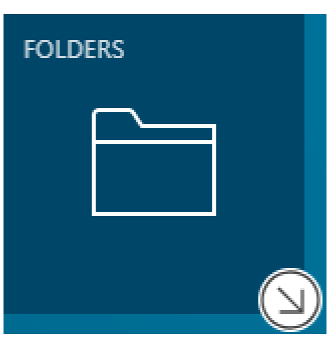
- To clear an individual column filter, click **Clear**.
- To clear all filters, click ⚙ to the right of the column headings and then select **Clear all filters**.



Modifying your home page

Resize a tile

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.

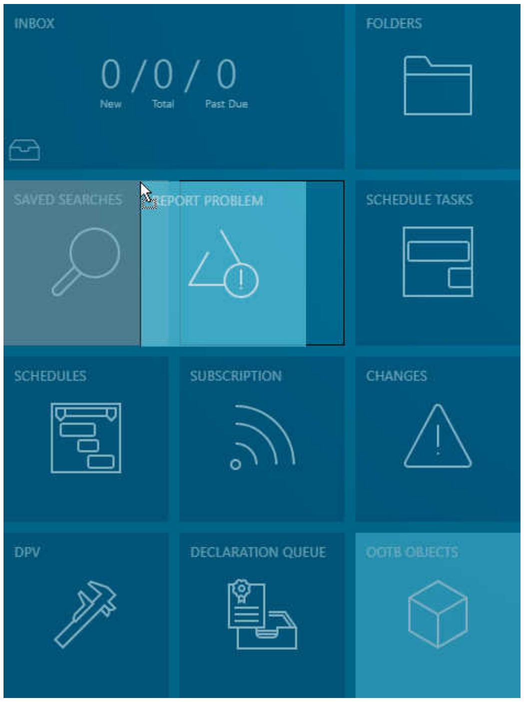
Arrange tiles

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.

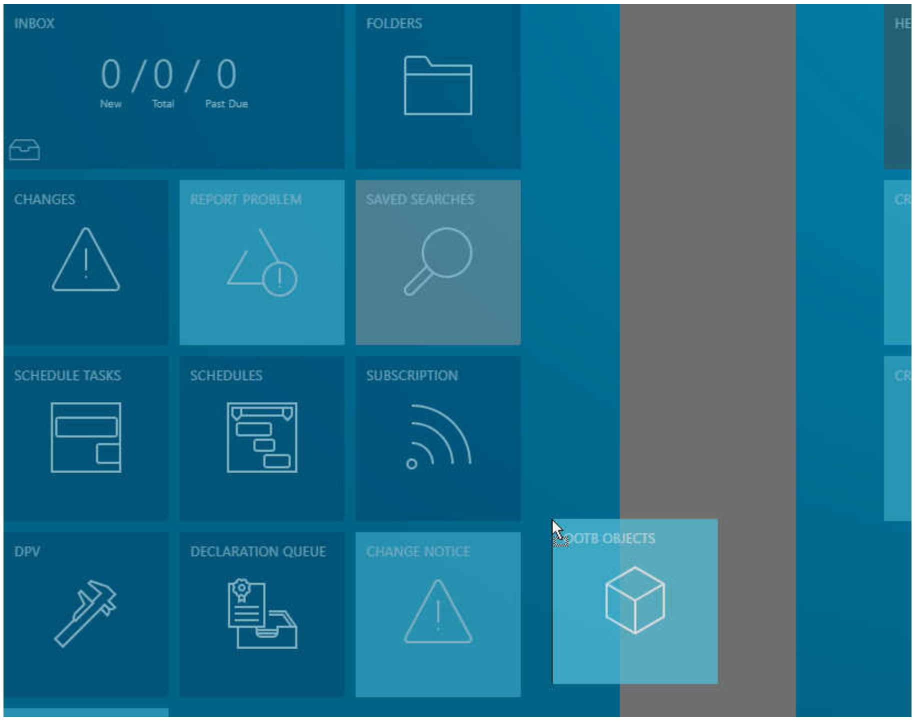


3. Drop the tile in the new position.

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**.

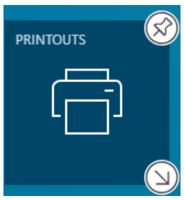
   The object is pinned to your home page. Object data, such as the ID, revision, and description display above the pinned object.

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

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

Note:

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.

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.

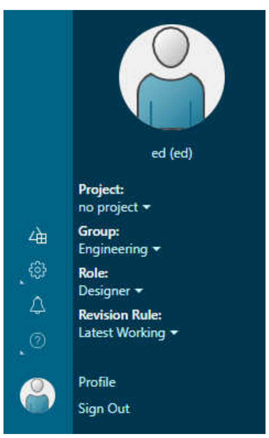
6. Click **Change**.

Change your group, role, or project for your session

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

2. Click 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 clicking the **PROJECTS** tile on the home page.



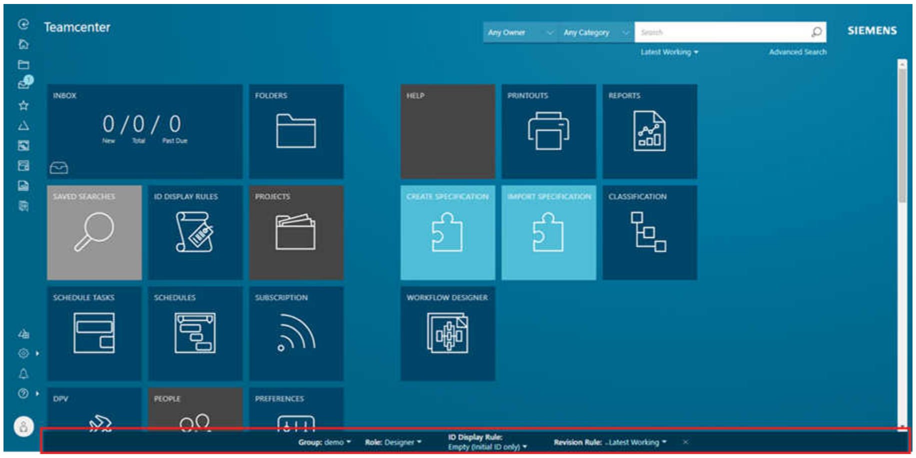
3. From the list of available options, select the one you want.

   > 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.

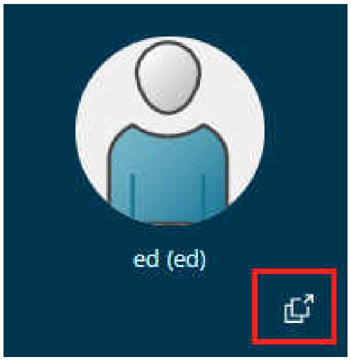
Pin user profile settings to bottom of browser window

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.

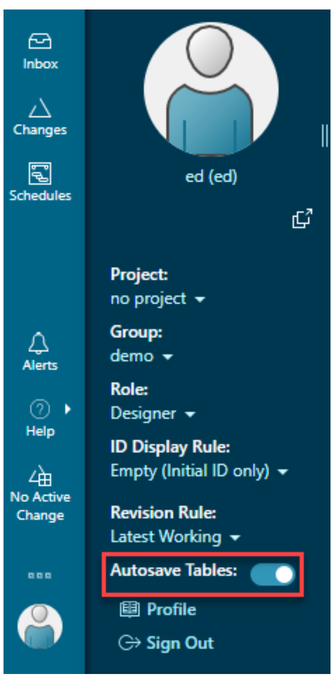
Autosave table edits

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 and select **Profile**.
2. Click the current revision display rule.
3. From the list of available options, select the one you want.

Select your geography

1. From the global navigation, click your profile icon and select **Profile**.
2. From 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.
4. Select **Edit** > **Save Edits**.

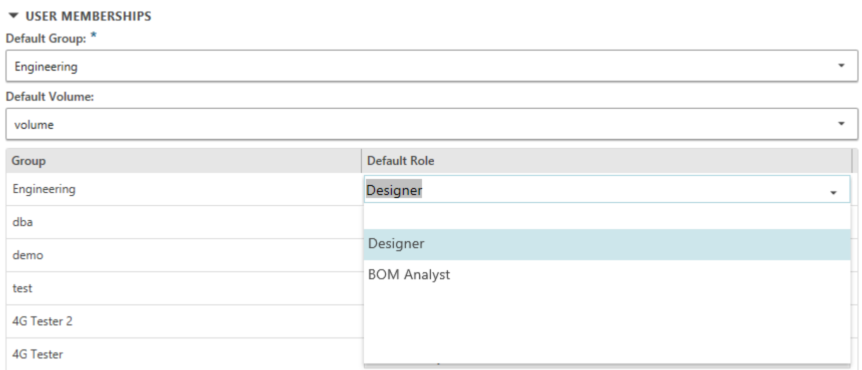
Manage your group, role, or volume from your Profile page

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, 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.



4. To change your default volume, select a volume using the **Default Volume** list.

5. When you are finished with your selections, select **Edit** > **Save Edits**.

Create and change ID display rules

Create an ID display rule

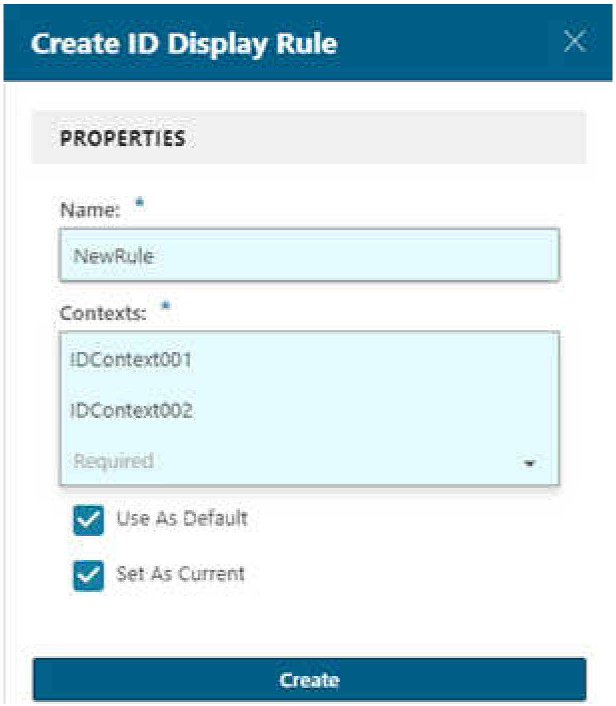
You can create a custom ID display rule to display objects with alternate IDs for a specified ID context.

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.

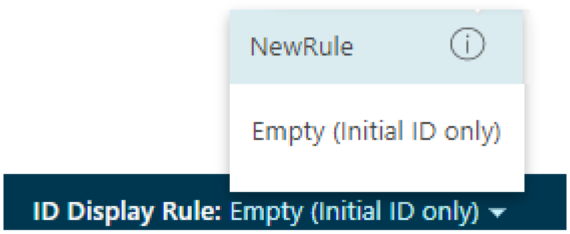
Your alternate IDs now display for the revision object.

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. Follow the instructions to change your ID display rule.

2. 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

Search for objects

In Active Workspace, you can search for objects stored in Teamcenter. You can refine your search, save and pin your search, and export your results. Search is available from the top right corner of most pages in Active Workspace. You may choose from three methods of searching:

Global search	Enter a search term to find objects that match data that has been indexed.
Quick search	Choose a predefined information type to find objects of the selected type.
Advanced search	Choose a predefined query and specify additional criteria to find objects.

The **Advanced Search** options are available below the global search box. On the **Advanced** search page, you can choose **Quick** or **Advanced** predefined queries from the **Advanced Search** panel.

Both types of **Advanced Search** are enabled by your administrator and may not be available.

Search video

The following video shows you how to perform a basic search in Active Workspace.

Global search

Global search finds indexed data stored in Teamcenter. You can personalize your search settings.

Entering and refining a search

- Narrow the scope of your search by choosing a prefilter from the list. For example, you might see **Any Owner** and **Any Category** lists. Prefilter lists are configured at your site.
- Refine the scope of your search by choosing a revision rule.
- View search **Suggestions** that match your search term as you type. Choosing one from the list runs the search. Search **Suggestions** may include phrases that match indexed object properties.
- View **Recent Searches** that match your search term as you type. Choosing one from the list runs the search, or you can clear the list.

- Refine your search criteria using **Boolean operators and other techniques**.
- Consider **search results relevance** methods to help return better results.

Viewing and refining the results

- **Choose a view for your results**.
- **Filter your results and refine your search**. Apply filters from a list of categories and properties. You can remove filters using the **breadcrumb in the header area**.
- You can display results by category in a chart.
- You can enter additional criteria to search within the results.
- You can 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 to your home page and share it with others.
  Access saved searches from your home page or from the **Saved** page in the **Search** header.
- **Export your search results** to Microsoft Excel or Microsoft Word.

Quick search

Quick search finds objects that match a predefined type of information. **Quick** search is available from **Advanced Search** if it's enabled for your site.

Searching

- Choose from a list of predefined information types and enter search criteria. You may use wildcards such as ***** and **?** in your search.
- Refine your search **using wildcards**.

If your search criteria extends to multiple lines, the entire string is considered one value. If you wish to search for a set of values, separate the search terms using a semicolon (**;**).

Results

- **Choose a view for your results**.
- **Export your search results** to Microsoft Excel or Microsoft Word.
- **Save and pin your search criteria** to use or refine later.
  Access saved searches from your home page or from the **Saved** page of the **Search** page header.

Types of Quick search

Predefined search types are configured for your site and may include:

Item ID

Search for matching item IDs.

Item Name

Search for matching item names.

Dataset Name

Search for matching dataset names.

My ItemRevisions (WIP)

Search for items with a status set to work in progress.

My ItemRevisions (Released)

Search for released items that you own.

My Documents

Search for documents that you own with a status set to work in progress.

All ItemRevisions (Released)

Search for all released item revisions.

Advanced search

Advanced search finds objects that match a predefined query. Predefined queries display additional criteria to refine the search.

Click the **Advanced Search** link below global search to display the **Advanced Search** panel and choose **Advanced**. Search criteria that was previously entered is cleared.

Searching

- Choose from a list of predefined queries that are configured for your site. Queries have additional criteria that narrow the results.
- Refine your search using wildcards.
- Prioritize your frequently used Advanced search queries by assigning them to **Preferred Searches** .

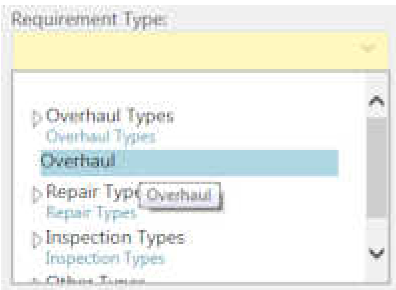
Results

- 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.

Tips for using Advanced search

- You can change the priority of your query property selection by moving it up or down. Click delete to remove a selection.
- If a property has a cascading list of values (LOVs), you must expand a parent value and select a child value. For example, to search on a **Requirement Type** of **Overhaul**, expand **Overhaul Types** and select **Overhaul** (not **Overhaul Types**).



> Caution:
>
> If your Advanced search query includes classification attribute filters, cascading and interdependent LOVs can appear flattened or the displayed values may not be valid. Selecting cascading and interdependent values is not reliable. To avoid the problem, manually enter search strings so that these LOV fields can find matching objects.

Refine global search with revision rules

Apply a revision rule for your search

A revision rule refines your list of returned objects to those that meet the rule criteria. Choose from the list of revision rules by clicking the displayed revision rule below global search. 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 global search.

The default revision rule is specified by your administrator. Changing the default revision rule affects all logins and devices.

Supported revision rule entries and clauses

Supported revision rule entries and revision rule clauses can be applied to global search. A revision rule that contains a supported clause can be applied during search. If the revision rule contains both supported and unsupported clauses, the supported clauses are applied, and the unsupported clauses are ignored.

Revision rule entry	Revision rule clause
Working	Working( )
	Working(Owning User = Current)
	Working(Owning User = <user_id>)
	Working(Owning Group = Current)
	Working(Owning Group =<group_name>)
	Working(Owning User = Current, Owning Group = Current)
	Working(Owning User = Current, Owning Group = <group_name>)
	Working(Owning User = <user_id>, Owning Group = Current)
	Working(Owning User = <user_id>, Owning Group = <group_name>)
Status	Has Status(Any Release Status, Configured Using Released Date)
	Has Status(<status_name>, Configured Using Released Date)
Latest	Latest (Creation Date)
	Latest (Alphanumeric Rev ID)
	Latest (Numeric Rev ID)
	Latest (Alpha+Numeric Rev ID)

Unsupported revision rule entries and clauses

Unsupported rule clauses are ignored:

Revision rule entry	Revision rule clause
Status	Has Status(<status_name>, Configured Using Effective Date)
	Has Status(<status_name>, Configured Using Unit Number)
Override	Override Folder()
	Override Folder(<folder_name>)
Date	Date(Today)
	Date(<date>)
Unit No	Unit No.(<unit_number>)

Revision rule entry	Revision rule clause
Precise	Precise
End Item	End Item(<Item>)

Work with 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 global search results:
  - Click **Search Filters** 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 global search **Results** page, you can apply available filters to narrow your search results using the **Filters** panel. The filters are displayed in alphabetical order after the leading special characters are removed.

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

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

Tips for using filters

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

- If you run the global search again, filters and in-context 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, even when it is not completely collapsed or expanded.

- 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 **Filters** panel or the **Chart by** list (which displays the results by property value). The chart and the search results list display the same color code for a selected filter property.
  The filter selections persist for the chart during the rest of your session unless you change it. 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
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 in the **Start Of Week** site preference.

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 some of your personal search preferences. On the results panel toolbar, click **Search Settings** to view the configurable areas.

FILTERS

Configures **Filters** panel behavior.

Update Filter Values

On click runs the filter search after you enter text and click search .

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

Hide filters with only "Unassigned" values

You may hide filters with values that are not assigned to any of the results, or clear it to display them.

> Tip:
>
> Limiting expanded filters takes precedence over hiding unassigned filters because limiting filters improves performance for search results. 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.

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.

Sort filter values

By count sorts the filter value list by total occurrences.

Alphabetically sorts the filter value list in alphabetical order.

Limit filters to expand

You can specify which filters are expanded in the **Filters to Expand** list. By default, the **Category** and **Type** filters are always expanded, and other filters may be configured by your administrator. Click **Reset** to revert the list to its initial settings.

RESULTS

Configures search results behavior.

Show results from attachments

You can include search term matches found in the attachments of returned items.

Clear it to display only matches found in the item name.

> 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.

Breadcrumb display

- The global search **Results** page displays the filters that are applied to global search results. You can remove filters using the breadcrumb.
- The **Advanced** search results page displays the criteria that are applied to Advanced search results. The breadcrumb is not editable.

Global search breadcrumb behavior

Filter values	Related filter values are grouped together in the breadcrumb, regardless of the order in which you choose them.
Find in this content for results list	Search criteria entered in **Find in this content** appears in the breadcrumb.

Hidden overflow filters	When a breadcrumb ends with a double chevron «, the length of your breadcrumb is longer than the available space. Click « to display the hidden filters.

You can remove all filters by clicking **Clear** at the end of the breadcrumb.

Click ⊗ next to a filter to remove it.

Save and pin searches

You can save global, Quick, and Advanced searches, which all appear on the **Saved** search page available from the header area. From the results toolbar, click **Save Search**.

Benefits of saving searches

- Save all your search criteria to use later.
- Share saved searches with other users.
- Pin saved searches to your home page.
- Update saved searches.
- From global search, you can choose from **Recent Searches** that are saved by the system during your current session.
- From **Advanced** search, you can choose from a list of preferred searches that you tag as frequently used.

Save a search

Global search

Keywords are the search criteria you entered.

Filters are the filters you selected for the search.

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

Advanced search

Type is the type of item you searched for.

Keywords are the search criteria you entered.

Global and Advanced

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

A **Saved** search list may include other searches shared with you.

- Click a saved search tile on the home page to run a saved search.
- Click the **SAVED SEARCHES** tile to open the **Saved** search list.
- Click the **Saved** page on the **Search** header to open the **Saved** search list.

You can refine the list using **Filters**. Click a search in the list to display its information. Run it by clicking **Open**.

When you run a saved global 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 it.

Delete a saved search

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

Edit a saved search

You can change a search name or choose whether to share or pin a search. Select the saved search and click **Save Search**. In the **Save Search** panel, make your changes and click **Save**.

Unpin a search

- From the **Saved** search list, click the search. Click **Save Search** and clear **Pin to Home**.
- From the home page, right-click the search tile to display controls on the corners. Click **Unpin**.

Run a recent global search

You can choose a query from **Recent Searches**. As you enter your search term, **Recent Searches** displays searches that match what you type. Recent searches are saved during your current session unless you choose **Clear All**.

Run a preferred Advanced search

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 Search Settings**.

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 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 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 output.

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

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

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.

Change your view

In the **Navigate** tab, select **Tree with Summary** or **Tree** view to:

Export information about the active folder or set of folders using **Excel Round-trip** > **Export To Excel**.
Active folders do not support **Import Changes**. You can use a different method to **import an active folder**.

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

Check whether you are the **Owner** of an active folder.

In the **Overview** tab, view key information about the selected active folder.

Click **Edit** on the primary toolbar to change the **Name** and **Description**.

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

Learn about an active folder

In **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. Check the owner of an active folder under the **Owner** column in the **Navigate** tab.

Create an active folder

There are several ways to create an active folder. The active folder is created as a child of your current folder selection. By default, it adopts the search criteria of its parent, and then you can further refine the search. You can also add other child folders.

- On the **My Active Folders** page, choose **Add Active Folder** from the panel toolbar. If the new folder is a child, it adopts the parent folder settings.
- You can create an active folder template from a selected active folder using **Share** > **Export Active Folder as a Template** . This creates an XML file containing the folder's hierarchy, rules and sharing information.
- On the **My Active Folders** page, choose **New** > **Import Active Folder** from the primary toolbar. Specify an active folder XML file with a folder definition, including hierarchy, rules and sharing information.
  It is possible to 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.
- On the **Home** folders page, choose **Add Active Folder** and provide the name and description. All active folders created from the **Home** folders page are shared with the **My Active Folders** page.

Specify the rules

After you create an active folder, set or update the search criteria from the **Rules** tab. You can create a new rule or edit an existing one. You can choose or change the type of search for the active folder search rule.

Each rule uses one of these search types:

Global	Set the search criteria the same way you would using global search. Click to find the results for your search term. You can refine the search using **FILTERS**. Results are automatically updated as you choose filters.
Advanced	Set the search criteria the same way you would using Advanced search. Click **Search** at the bottom to run the search.
Saved	Set the search criteria by choosing **Import** to find a Saved Search. Use the query as is, or you can make additional changes, according to the type of saved search.

Change the rules

In the **Rules** tab, refine a 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.

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

- For global searches, the results are updated in the right panel as you make changes.
  For Advanced searches, the results are updated when you click **Search** at the bottom of the panel.
- **Import** a saved search to replace the current search criteria.
- Click **Reset** to completely clear the search criteria.

Save Edits saves your changes.

Share an active folder

If you have permission, you can share a selected folder from **Tree with Summary** view.

1. Choose **Shared With** 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. You can **Add** and **Remove** items from **SHARED WITH**.

Your selections are saved automatically.

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.

Search property names

You can enter display names and internal names for property values in global search. For example, you could search for Item Revision using **Type:"Item Revision"**.

Display names may be localized. Display names must be configured and indexed for localized values to be available.

Searching properties

- You can search string and string array properties.
- You can search for these reference properties using their display names:

  Use **Type** for **object_type**.

Use **Release Status** for **release_status**.

Use **Projects** for **project_list**.

- If filter values are localized, then the values for the user's locale are displayed. If no value exists for the current locale, then the master value is displayed.
- Search criteria that is not entered in the current locale can still return results from another locale. For example, entering a German word in an English locale can return a German value if it exists.

Global results relevance

Global search results may be affected by how data attributes have been configured for relevance. Multiple calculations are applied to generate initial scoring on search results. Boosting configuration is then applied to initial scores. Boosting can amplify the score, but it is possible that an initial score of one object may exceed a boosted score of another object when applied to search results.

Factors affecting relevance

In general, the following may affect how relevance is calculated and applied to search results:

- Properties with an exact match may take precedence over partial matches.
- Properties with any match may take precedence over exact matches in file content.
- Boosting that has been configured for business objects, ownership, date, or word proximity.

Tips for global searches

Search techniques and operators for global search

You can use Boolean operators and other techniques to refine searches. Searches are not case sensitive.

Search technique	Examples and Descriptions
Wildcard search: asterisk (*****)	Entering **HDD 0500** automatically performs a search for **HDD* 0500***. By default, the search adds an implied wildcard asterisk (*****) character to the end of each search term. A search for **HDD 0500** 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).

Search technique	Examples and Descriptions
	Siemens Digital Industries Software recommends that the wildcard (*) be used cautiously for non-indexed structure search because it might adversely impact the performance.
Matching: quotation marks (" ")	**"Shielding Tile"** returns objects with the string **shielding tile** in any indexed fields. Due to index term stemming, **shielding tile** also returns objects with the string **shield tile** in any indexed field.
Special characters	To search for the following special characters, be sure to enclose your search criteria in quotation marks (**" "**). **( ) { } [ ] - :**
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.
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**.
Terms with multiple associations: **(AND) OR**	**(chrome AND matte) OR aluminum** returns objects that either contain both **chrome** and **matte** together or **aluminum**.
Search for terms with multiple associations: **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**.
Search property values: 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.
Search property values: quotation marks and colons (**“”:**)	**"Group ID":engineering** Use quotation marks for display names with spaces and property values with spaces.
Search property values: quotation marks for property values with parentheses or braces.	If the property is: **Name: {test}** Then enter the search criteria: **Name: "{test}"**

Search technique	Examples and Descriptions
Search property values: 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.
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"*

Search technique	Examples and Descriptions
	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.
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).

The default Boolean operator applied for all keywords in a search term is set by the **AWS_Default_Query_Operator** preference.

Ignoring common words from global search

If your search phrase contains a common word, such as **the**, **and**, **for**, or **a**, it may be ignored in your search criteria. 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.

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

Common words, called stop words, are not typically indexed to improve performance. However, stop words are configurable to allow searching for common words.

For example, the common word **for** may be configured as a stop word. In the search phrase **"Parts for Sprockets"**, the common word **for** is replaced by a wildcard in the search query. This means that search results might return **"Parts for Sprockets"** and **"Parts and Sprockets"**.

You can search only in the master language set on the server, which is set by an administrator.

Tips for Quick and Advanced searches

Quick search and **Advanced** search are predefined queries. Generally, the more criteria you enter, the more specific your search results will be. Quick and Advanced searches are not case sensitive.

You can use wildcard characters for string attributes, such as ***** and **?**, to match single or multiple characters in specific positions of a search string.

Asterisk *	The asterisk wildcard searches for the root of a word followed by one or more characters.
Question mark ?	The question mark wildcard 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**.

Perform a shape search

You can find objects with a shape and size that are similar to a selected object. If shape search is configured, you can activate it by selecting an existing object that has been indexed for shape search. Choosing a part from your search results may reveal **Shape Search** on the results panel toolbar.

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. Then you can choose **Shape Search Filter** 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.

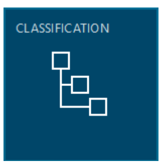
- The **Size** slider specifies the minimum and maximum size for matching results. Size is a percentage of the referenced object and not a specific dimension.

Filtering by classification

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.

> Tip:
>
> The visual navigation cards provide links to the next level down in the hierarchy so that you can move down the hierarchy two levels at a time.

As you navigate down the hierarchy, clicking arrows in the **Class Navigator** pane opens the hierarchy while clicking the class performs an automatic search in the class.

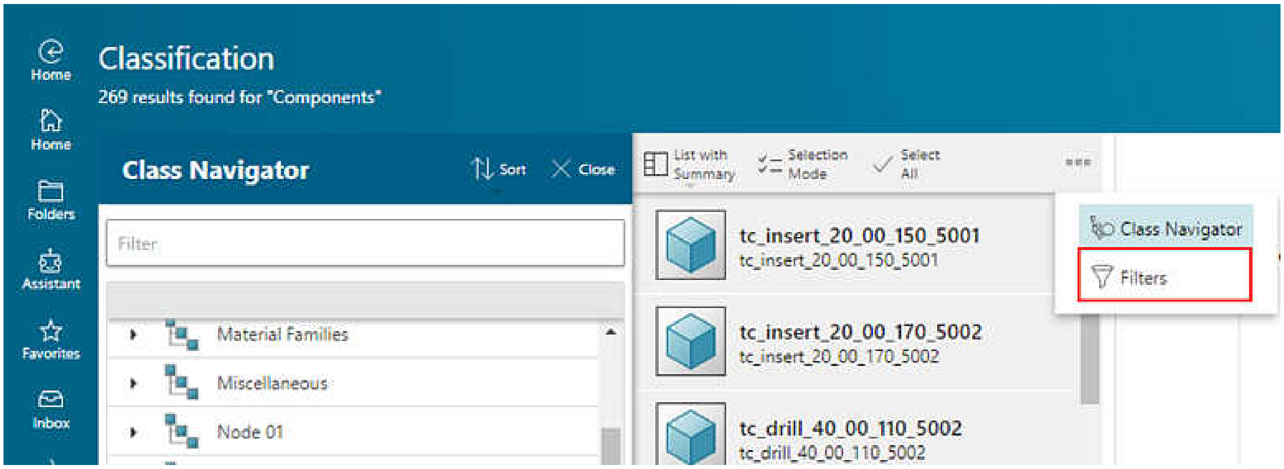
Alternatively, click **Filters** to narrow your search.

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

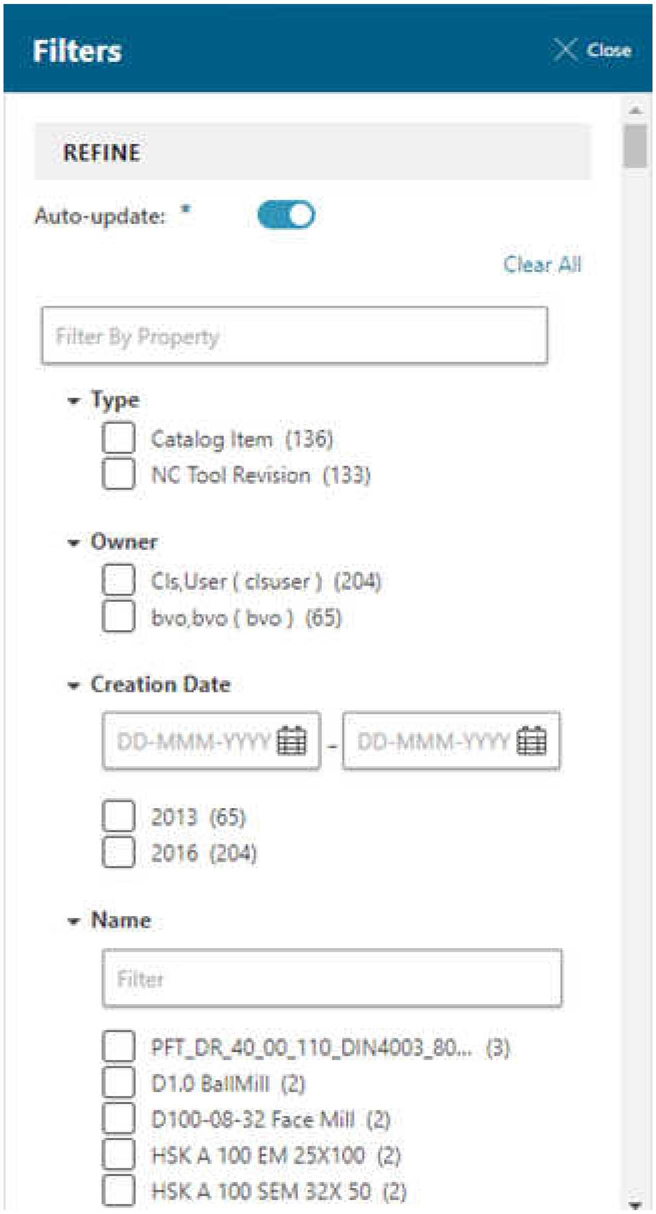
Find an object by searching for a specific property value

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 any of the following:

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

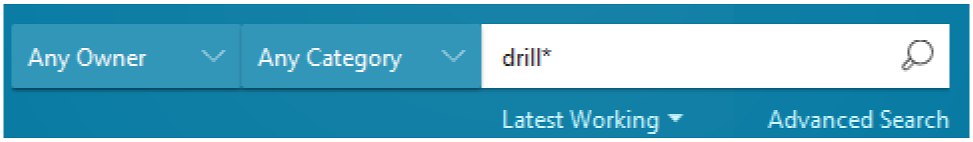
   - Select the desired value within any of the filters.

   Turn the **Auto-update** button on to see the effect of each filter on the results as you select the filter. If the command is turned off, you must adjust the filters and then click **Apply All**.

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

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.

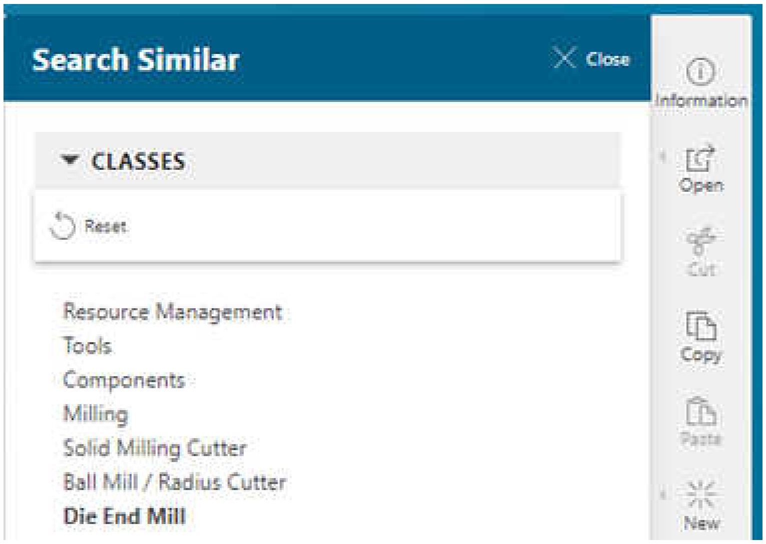
Search for an object based on the properties of another object (search similar)

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 permit the pop-up blocker permission to open the web page.

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



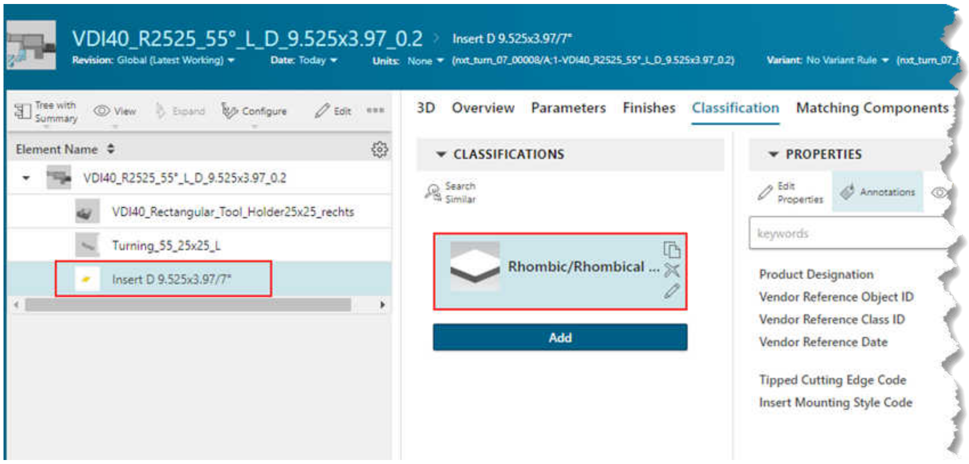
3. To search in the same class as the currently opened object, click **Search**. Alternatively, you can widen your search by clicking any of the parent classes displayed in the hierarchy and then clicking **Search**.

   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. If the **Auto-update** option is turned on, the results of the new search are displayed automatically. If the command is turned off, you must adjust the filters and then click **Apply All**.

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

Search for a class using the following syntax:

Class name:

Class id:

For example: **Class name:Step drill**

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

Filtering by visual navigation cards

You use visual navigation cards to navigate a hierarchy. Visual navigation cards display a class image along with other key attributes to assist you in finding an object. Additionally, they provide links to all subclasses of the selected class.

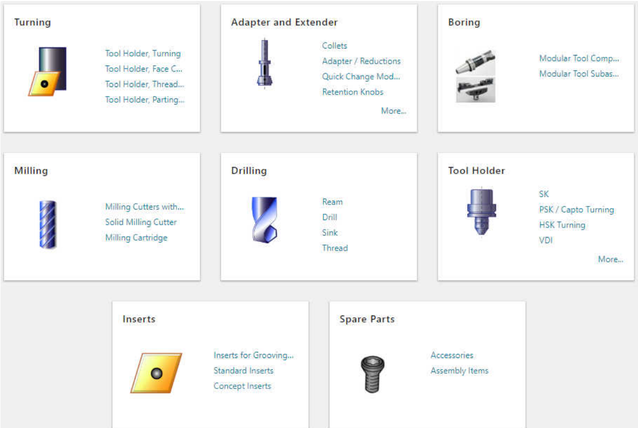
> Note:
>
> The use of visual navigation cards requires installation of the **Presentation Layer - Next Generation Classification** feature. Additionally, for classification classes, the presentation layer must be installed.

Visual navigation cards are displayed when you:

- Search for **Type: Library Element**. If the majority of the search results are library elements, virtual navigation cards are displayed, taking the place of a bar chart.
- Select the **Library** header on the **Filters** panel.
- Open a **Library**.

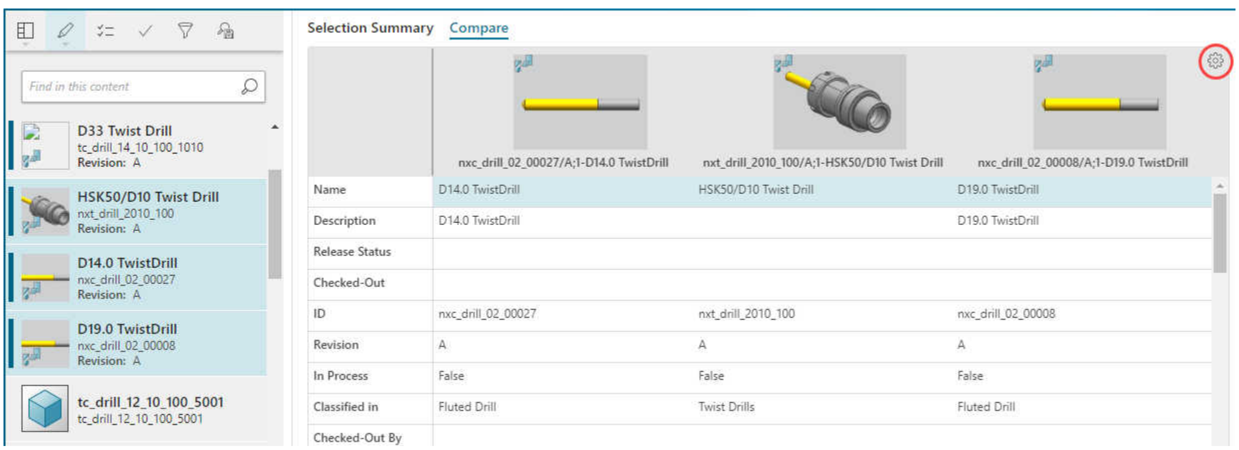
- Navigate the classification hierarchy.

To use, select the visual navigation card and the next level in the hierarchy is displayed. To navigate up the hierarchy, use the breadcrumb.



Include classification properties when you compare search results

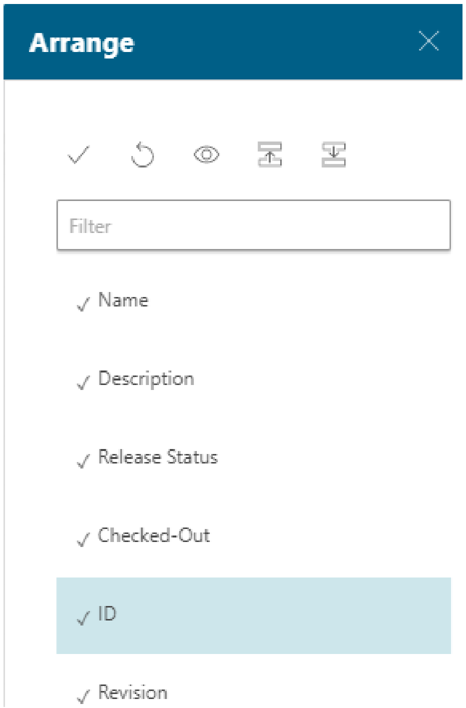
When you select multiple search results, you can compare their properties in a table. Classification properties are included in this table.



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 ⚙.



The settings in the **Arrange** panel are valid for the current session only.

> 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.

4. 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 *superceded* item revision to **Favorites**.	**Favorites** will display the *superceded* 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	(superceded revision)
Item revision	026355 revision B	(superceded 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 *superceded* revision)	Item revision - 026355 revision A (a *superceded* revision)
Example 5	Item revision - 026355 revision B (a *superceded* revision)	Item revision - 026355 revision B (a *superceded* 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 *superceded* 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.

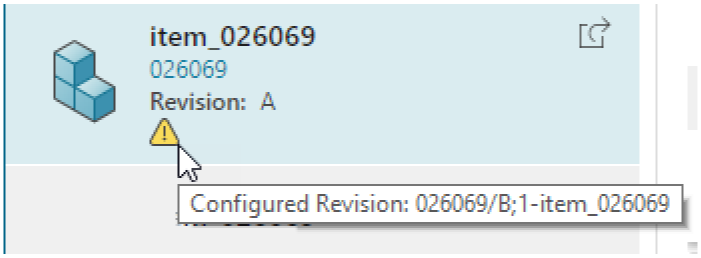
Item	026355	
Item revision	026355 revision A	(superceded revision)
Item revision	026355 revision B	(superceded revision)
Item revision	026355 revision C	(configured revision)

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 *superceded* revision)	Item revision - 026355 revision A (a *superceded* revision)
Example 5	Item revision - 026355 revision B (a *superceded* revision)	Item revision - 026355 revision B (a *superceded* revision)

Superceded icon

Item revisions that have been superceded 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.

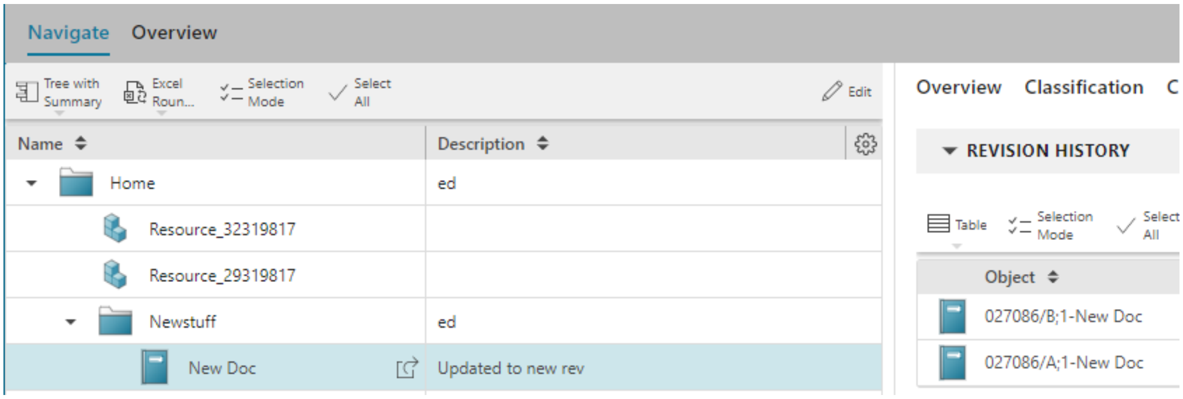
Keep the following in mind with how revisions display in Active Workspace when dynamic revisions are enabled.

- 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.

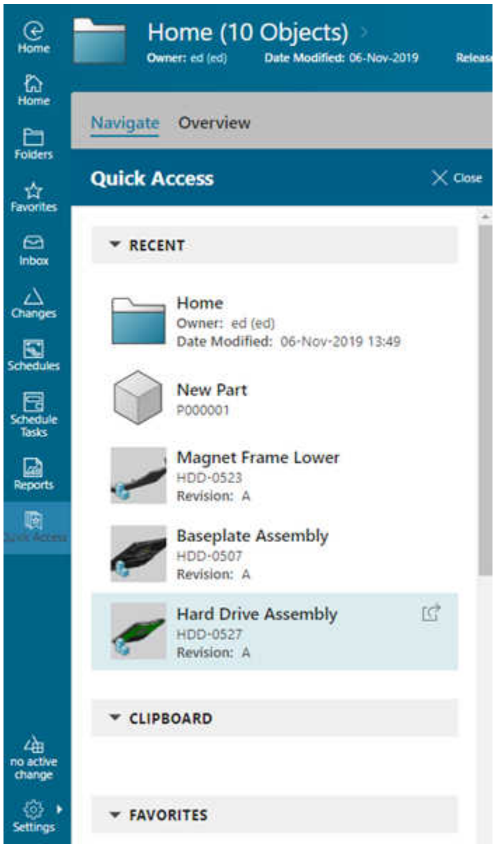
When relating an item revision to an object, such as adding a document (revision B), you can search for the item revision and then add it as an attachment to the object. If the related item is later updated to a new revision (revision C), the attached item revision automatically gets updated to show 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. You can:

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



Open a part, document, or other object

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.

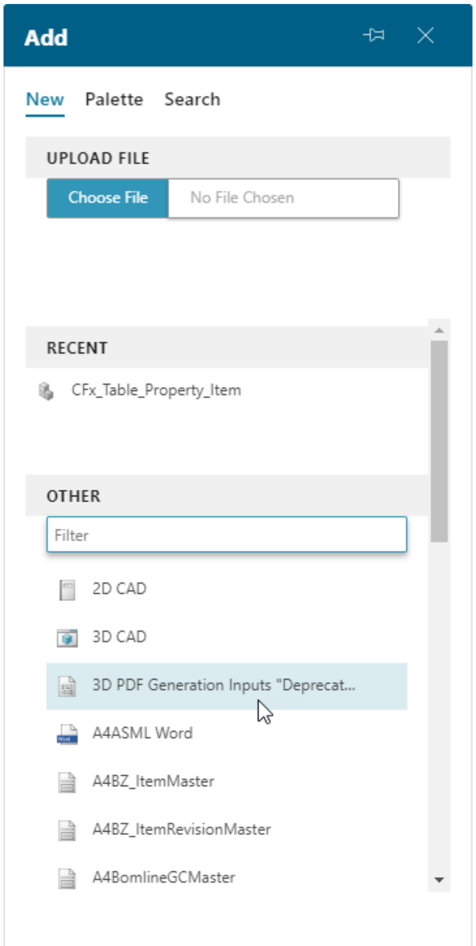
Create / Add a part, document, or other object

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 either from the list of recently used types or from the full list of available types. You can also search for a type using the **Filter** box.

   The types that display are configured by the system administrator.

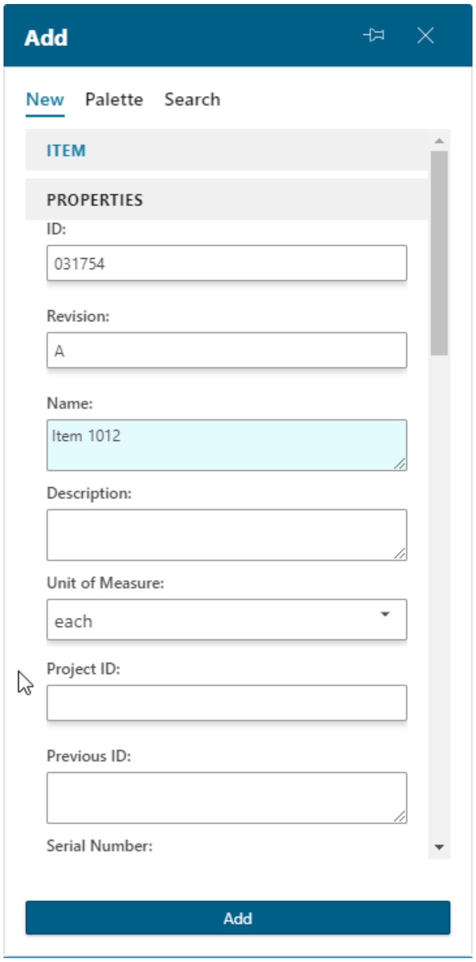
   If you are creating a new attachment, you can upload an existing file as an attachment to the new object. Click **Choose File** and select the desired file. Active Workspace automatically sets the type to the file type that matches the file extension. If there is more than one choice, Active Workspace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

Change ownership

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:

- **Schedule**
- **ScheduleTask**
- **Schedule Deliverable**
- **Schedule Task Deliverable**
- **Schedule Member**
- **Proxy Task**
- **RateModifier**
- **ResourceAssignment**
- **TaskDependency**
- **Qualification**
- **Required Qualification**
- **Fixed Cost**
- **Schedule Audit**
- **CostValue**
- **Comment**
- **Answer**

- **Question**
- **Rating**
- **Helpful**
- **Task**
- **Measurable Attribute** (Abstract)
- **Measurable Attribute String**
- **Measurable Attribute Boolean**
- **Att0MeasurableAttributeInt**
- **Measurable Attribute Double**

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.

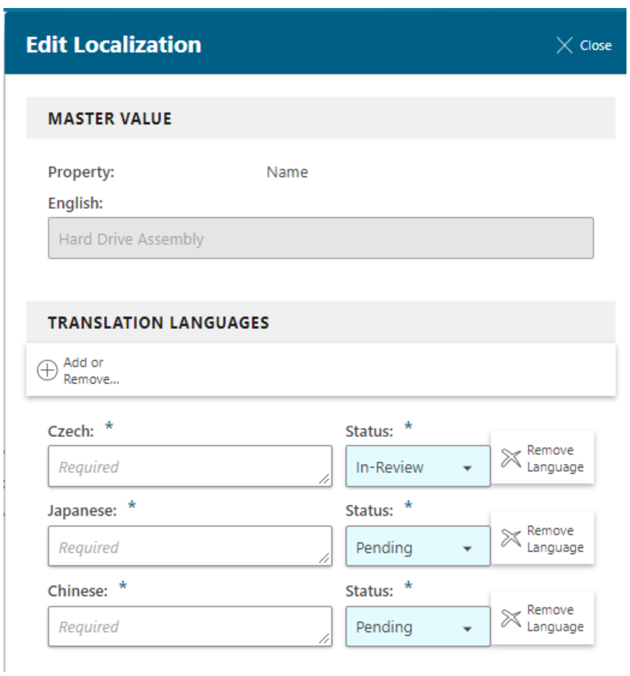
As you edit, the cells appear with a different background color to indicate that the changes have not been saved. Once saved or cancelled, the background changes to its original color.

4. Save your changes by clicking **Edit** > **Save Edits**.
   To cancel your edits, click **Edit** > **Cancel Edits**.

> Note:
>
> You cannot edit array properties with LOVs from within a table, use the list with summary view or the info panel instead.

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.

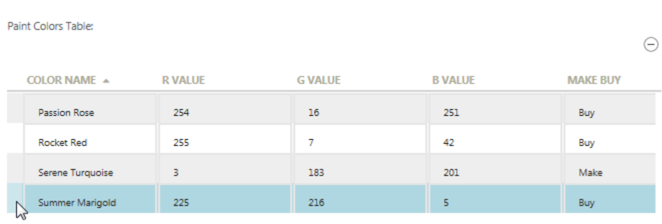
2. In the **TRANSLATION LANGUAGES** section, click **Remove Language** next to the language you want to remove.

   Alternatively, you can also uncheck 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.

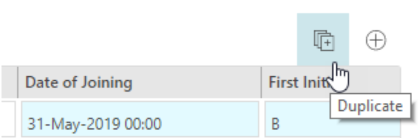
Duplicate a row

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**.

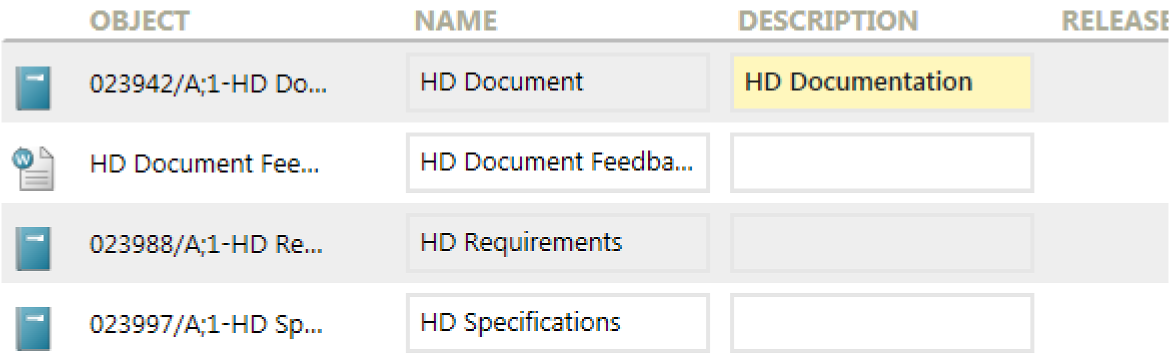
Autofill properties in a table

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

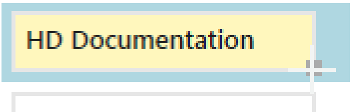
1. Display the table and click **Edit** > **Start Edit**.

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	

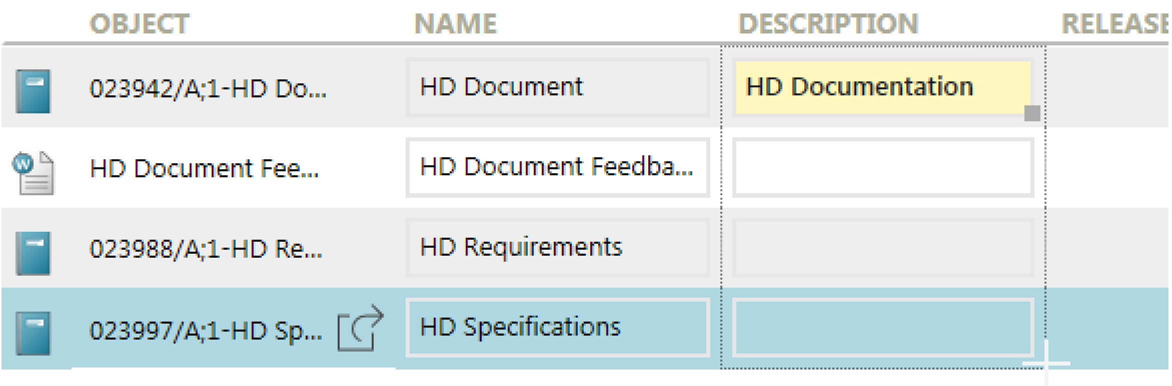
2. In the table, select a cell and, if the cell is empty, enter the content to be copied.



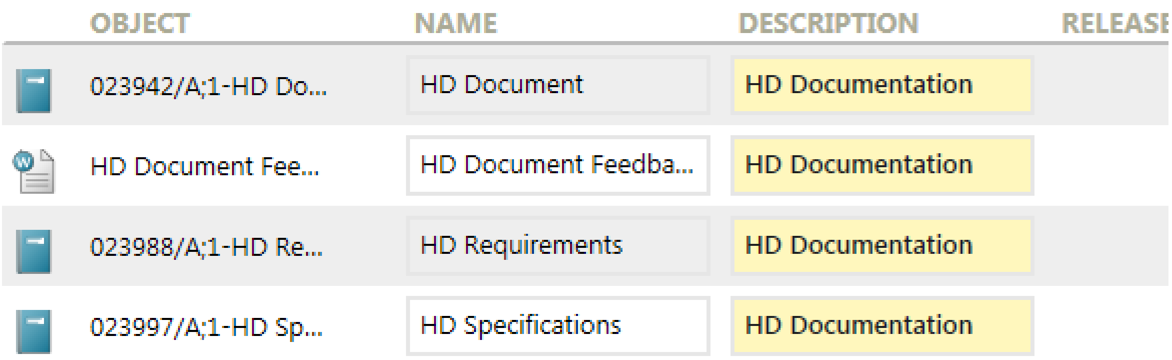
3. Move the mouse cursor over the cell to display the small fill-down box in the lower-right corner of the cell, then place the cursor over the small box to display the large plus sign (**+**).



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.



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

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 Internet Explorer windows, or between two Chrome windows, where both browsers are running Active Workspace.
- You cannot drag-and-drop objects between an Internet Explorer window and a Chrome 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.

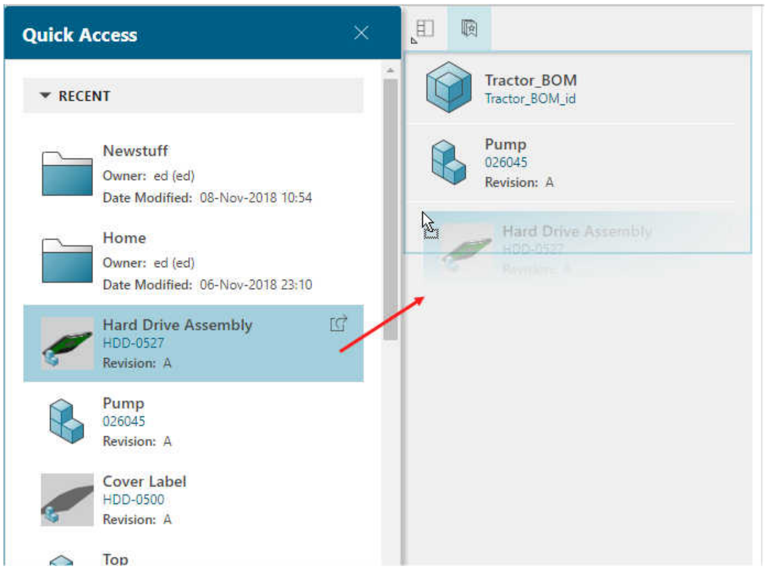
You can use drag-and-drop between dissimilar browser windows, such as between an Internet Explorer window and a Chrome window, to open a selected part, document, or other object.

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.

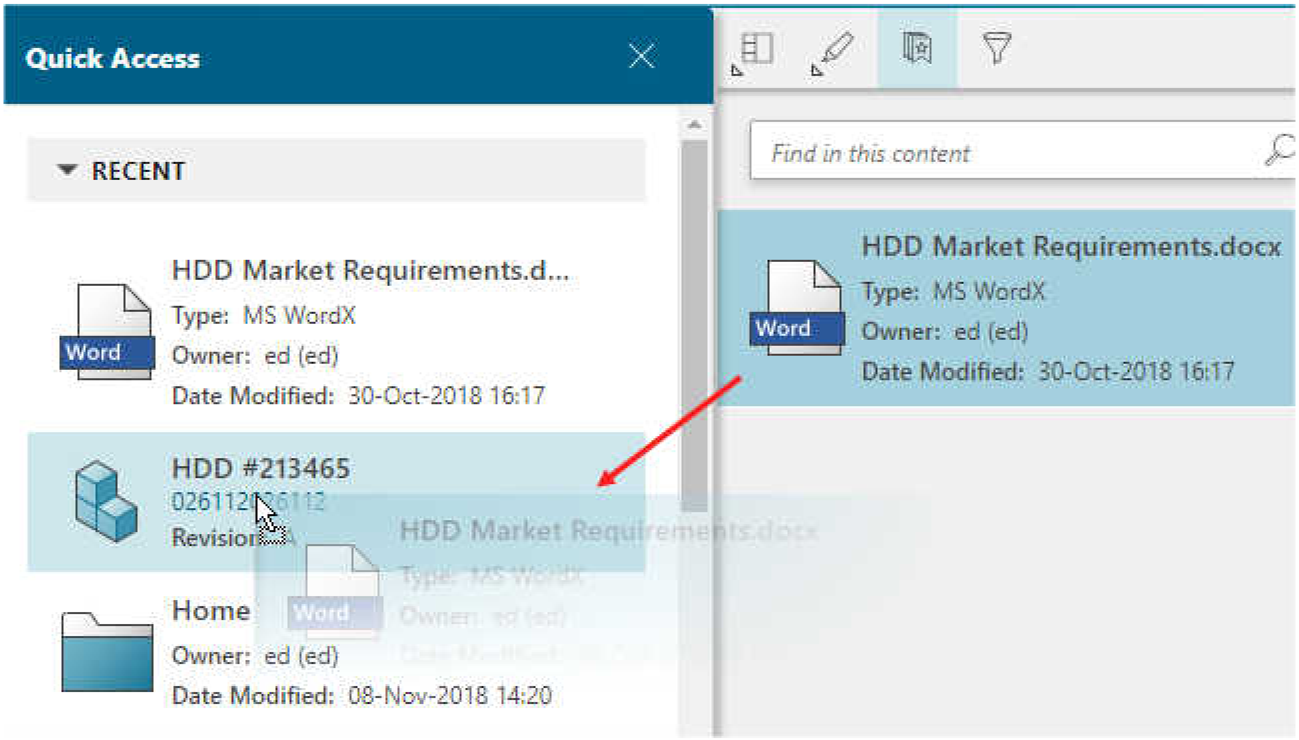
Drag-and-drop in lists and tables

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 and alternate IDs

Alias and alternate IDs allow you to better manage your part data, such as supplier part numbers, customer naming standards, and support for legacy part names. Alias 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 or alternate ID, you must choose an ID context. This is configured by your administrator.

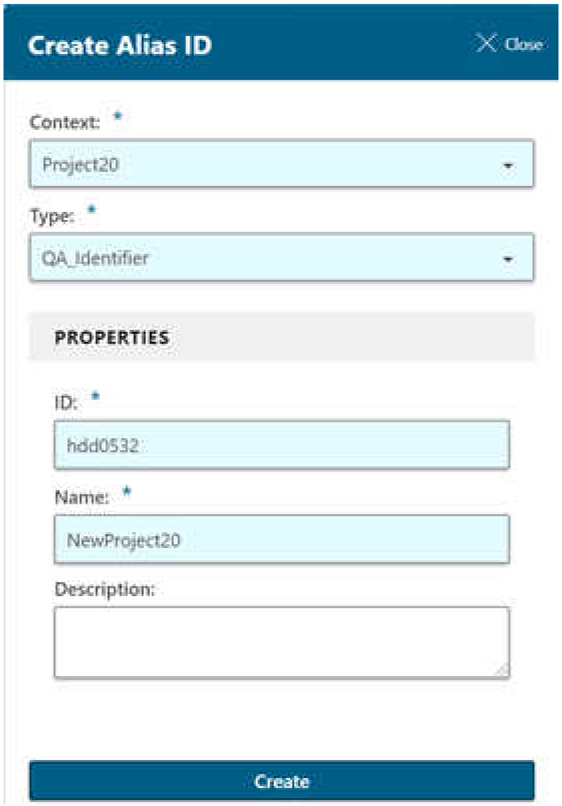
Create an Alias ID

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**.

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**.

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

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

2. Click **New** > **Save As or Revise**.

3. Click the **Revision** tab if it is not selected.

4. Enter the properties for the new revision.

5. Click **Save**.
   The revision is created and displayed in edit mode.

> Note:
>
> When you create a new revision of an existing object, you cannot enter a different ID. To create a new object with a different ID, use the **New** tab on the **Save As** panel.
>
> You can only use **Save As or Revise** in the **Summary** view.

Create a new object from an existing object

1. Select the revision from which you want to create a new object.

2. Click **New** > **Save As or Revise**.

3. Click the **New** tab.

4. Enter the properties for the new revision.

5. Click **Save**.

   The new object revision is created and displayed in edit mode.

6. (Optional) Specify additional properties for the revision, and then click **Save Edits** .

   The edits are saved and the revision is displayed in read-only mode.

> Note:
>
> You can only use **Save As or Revise** in the **Summary** view.

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

1. Display the attachments for an object.
2. Select the attachment.
3. Click **Edit** > **Replace File** to display the **Replace** pane.
4. Click **Choose File** to select the file to replace.
5. Click **Replace**.
   A message is displayed to indicate success.

Replacing files using Data Share Manager

If you have the Teamcenter Data Share Manager application installed (see **Upload or download large data files**), use the following steps to replace files.

1. Navigate to the object with the file you want to replace.
2. Click the **Attachments** tab.
3. Select the dataset to replace.
4. Click **Edit** > **Replace File** to display the **Replace** pane. 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** pane 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.

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

Open or download attached files

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.

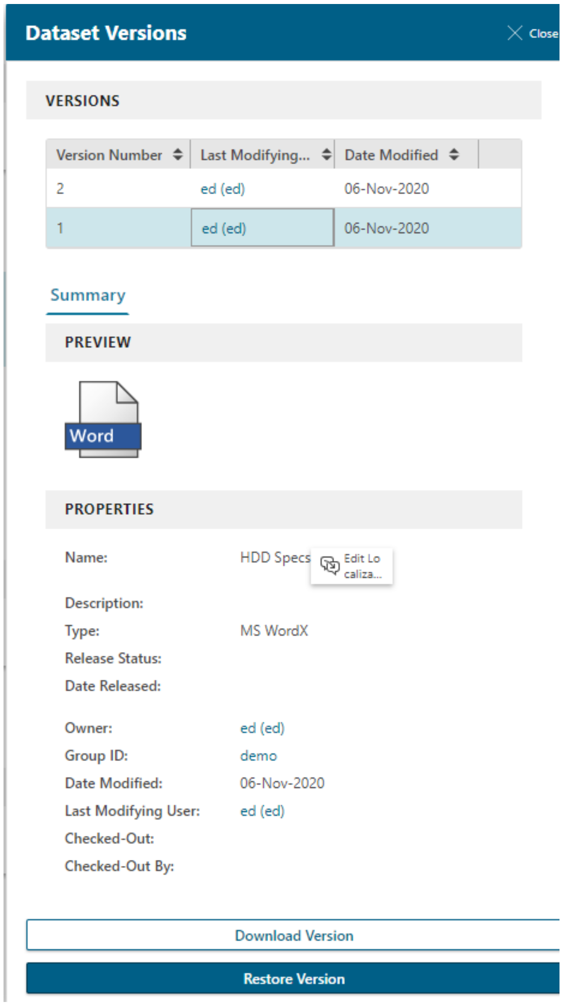
2. In the **FILES** section, select the attached file with the previous version you want to view.

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

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

2. Select the item revision and click **Open** .

3. Click on the **Attachments** tab.
   All of the drawings related to the item revision are displayed under **FILES**.

View and mark up your attachments using the universal viewer

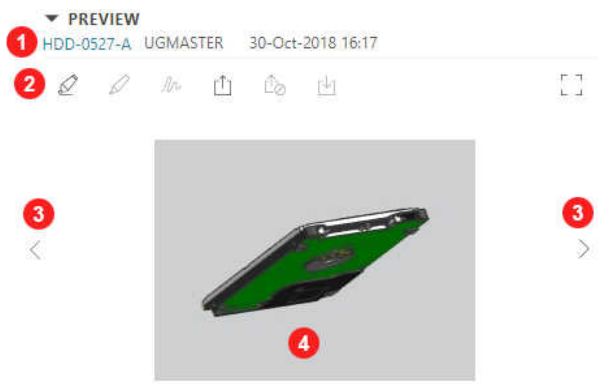
Use the universal viewer to view object attachments. The universal viewer is displayed in an object's **Overview** tab if there are attachments for the object, or in a workflow task's **Overview** tab if there is an associated attachment. The universal viewer can appear in other areas within Active Workspace,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

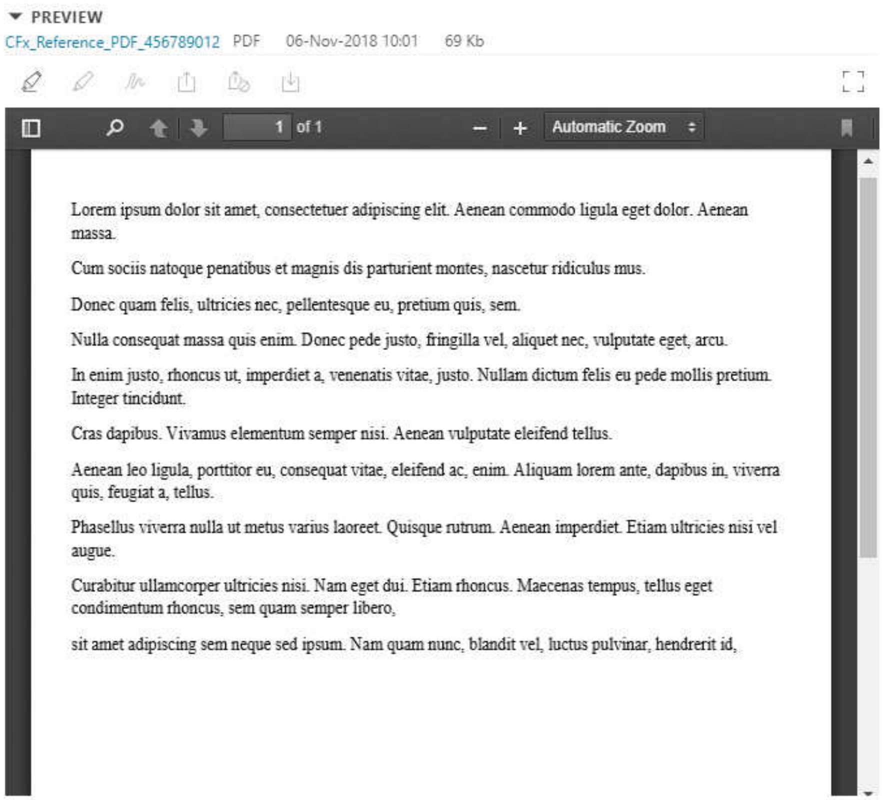
> Note:
>
> The file types and the functionality supported will depend on how your administrator configures the universal viewer for your site.

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



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. Click your name in the upper left corner of the Active Workspace home page.

    b. 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.

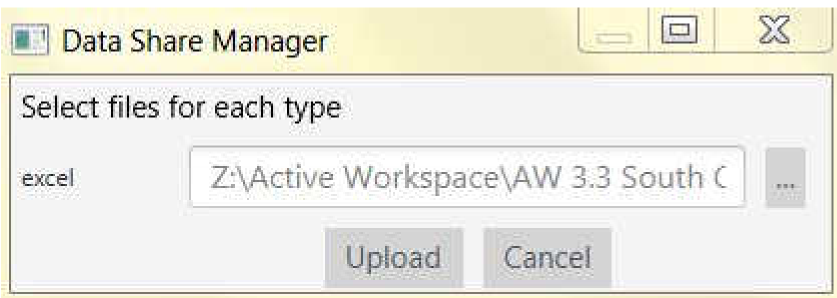
    d. Click **Add**.

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.

Exploring relations between objects

Tips for using Relations

You can use *Relations* to view objects and the relations between objects in a graphical format. You can:

- 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.

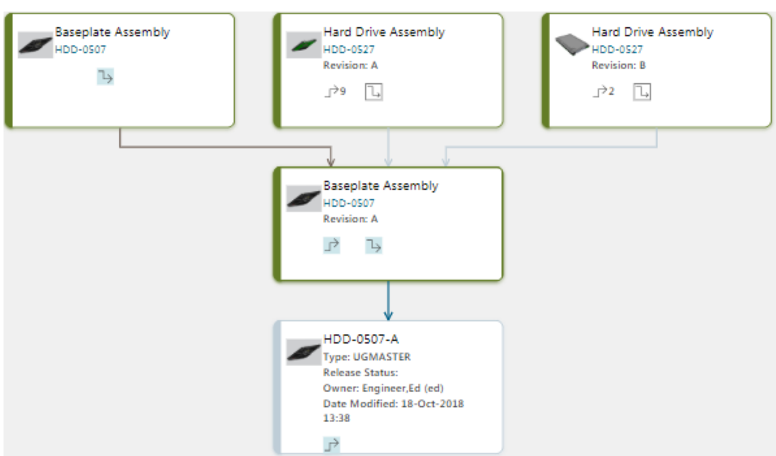
- Use the roller on your mouse to zoom in and out of the network. The more you zoom in, more detailed information is displayed.
- Point the mouse over an object in the network to display additional details, such as the object name.
- Point the mouse over an edge (that is, a line connecting two objects) 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

1. Search for an object using the Active Workspace search box.
2. From the list of search results, click the object for which you want to view the related data.

   This is the root object.
3. Click 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.

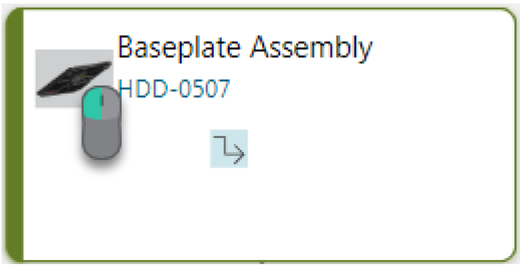
 Hides all the outgoing relations or shows all the outgoing relations, as applicable.

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:

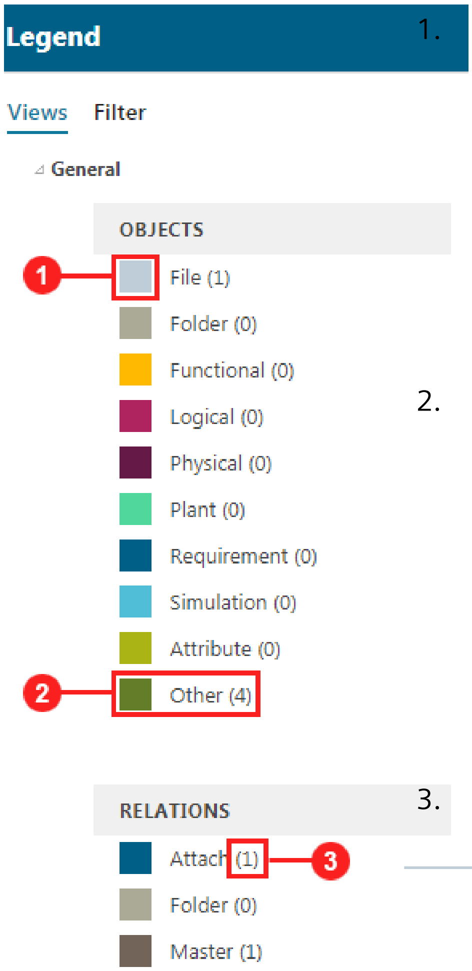
   - Objects whose icons are grayed out are hidden in the graph. Click the objects to make them visible.

   - 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. Click the object or relation name to select the object or relation in the work area.

   Use the Ctrl + click menu command to select multiple objects or relations.

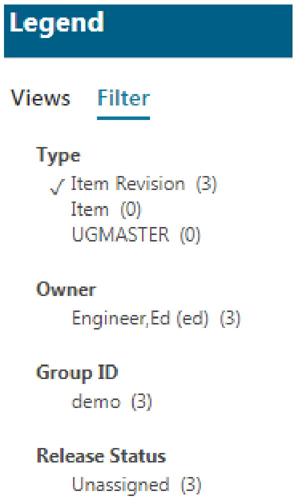
   If you select or undo the selection of an object in the work area, the corresponding object type is selected in or cleared from the **Legend** pane.

   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.

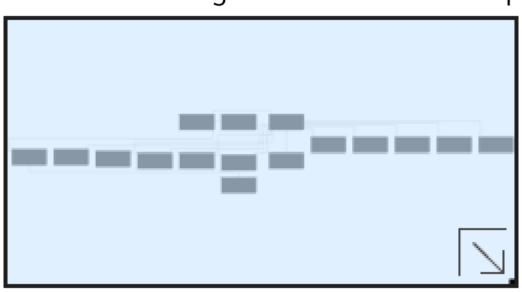
    b. Press the Shift key and select another object in the graph.

    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.

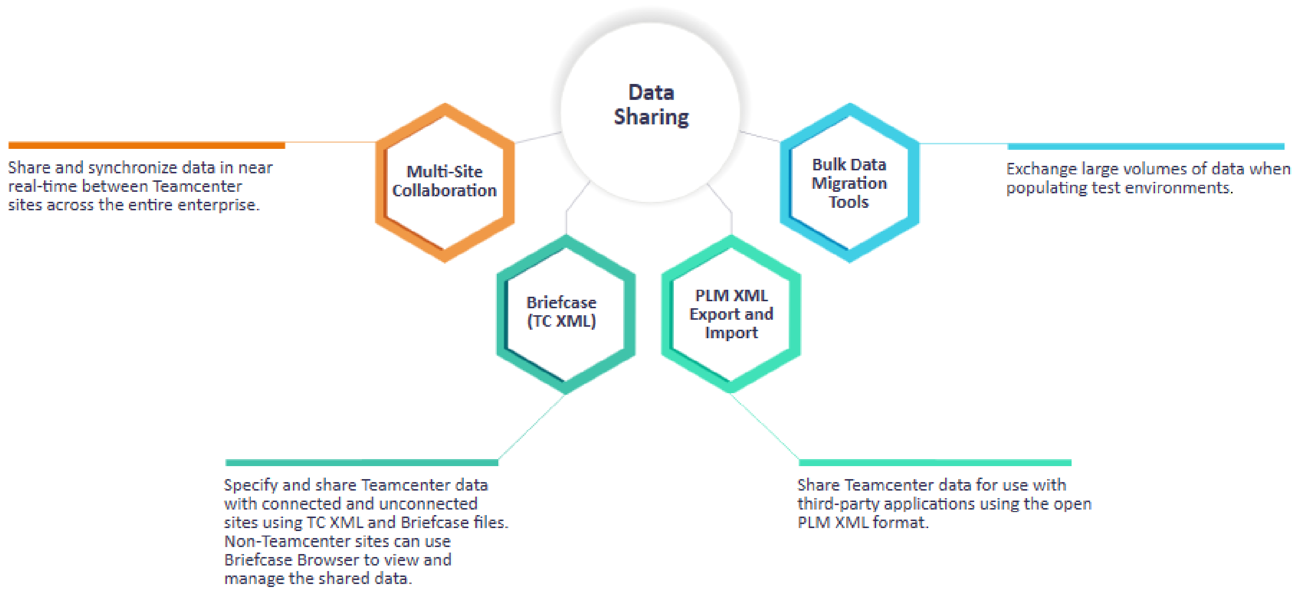
Sharing data

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:



Where do I go from here?

Administrator	
Monitor your Multi-Site federation	See Multi-Site Dashboard to view the issues in your Multi-Site federation using charts, graphs, and detailed object reports.
Configure your organization for sharing objects using Briefcase files	See the section on how to configure Briefcase file sharing.
Configure your organization for sharing objects 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 data using Briefcase files	Get information on **using Briefcase files**.
Import or export data using PLM XML	See the section on how to **share data using PLM XML**.
Share data 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 type specified with the **Briefcase_export_supported_types** preference. You cannot export objects using Briefcase files in the design context when using Supplier Collaboration.

Exporting objects using Briefcase files

You can share objects with other sites by exporting them to a Briefcase file and providing 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.

You can export objects of the type specified with the **Briefcase_export_supported_types** preference. You cannot export objects using Briefcase files in the design context when using Supplier Collaboration.

Export the 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 the items to be exported to the target site and select **Share** > **Export to Briefcase** to display the **Export to Briefcase** panel.

3. Specify the export properties on the **Export to Briefcase** panel.

   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*.

4. 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.

Importing objects in Briefcase files

You can import objects 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 in 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 in Briefcase files

1. In Active Workspace, select the **Awb0Element** root business object or the folder into which you wish to import the objects in 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*.

6. Click **Import** to import the objects in the Briefcase file.

   If **Validate** is set to **Yes** and errors that impact data integrity occur during the import run, the objects in 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 using the steps in **Checking in objects changed at another site**.

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.

Checking out objects to another site using Briefcase checkout

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 and revising item 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.

Use the following steps to perform a Briefcase checkout:

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.

Canceling 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.

Checking in objects using Briefcase checkin

After you import a Briefcase file containing objects that were checked out using Briefcase checkout, you can check in the objects to your site (referred to as a Briefcase checkin).

- You can perform a Briefcase checkin for objects in Briefcase files that have been checked out for your site.

- You can perform a Briefcase checkin when you are the user who performed the original Briefcase checkout of the objects. An administrator can also perform a Briefcase checkin when another user performed the checkout.

- You cannot perform a Briefcase checkin 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.

Transferring 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.

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 not be a 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. With the objects to be marked for ownership transfer selected, select **Manage** > **Transfer Ownership** to display the **Transfer Ownership** panel.

2. 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.

3. Set **Target Site** to the name of the site to which you are transferring ownership.

4. Click **Transfer**.

   The objects are marked for ownership transfer. Ownership is transferred when the Briefcase file is exported.

Viewing 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 before selecting **View** > **Pending Ownership Transfers**, if it is marked for ownership transfer, it will be 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.

Canceling 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.

Previewing and comparing briefcase files

You can preview and compare briefcase files that have been uploaded to Active Workspace.

Preview a briefcase

1. Locate and select the briefcase file to preview.

2. Click **View** > **Load Briefcase**.

3. Briefcase contents can be mapped to different objects and structures upon import. To preview how the briefcase contents will appear after mapping, choose a transfer option set that has mapping transformation rules defined. The objects in the briefcase will be transformed according to those rules before previewing.

4. Click **Load Briefcase**.

The briefcase contents are displayed. Expand and collapse the hierarchy of items in the briefcase to review its contents.

Compare briefcases

Briefcases can be compared when they appear in the same folder or when both briefcases appear in the list of search results.

1. Locate the briefcases to compare. Use multiselect mode (CTRL + click) to select the two Briefcases.
2. Click **View** > **Compare**.
3. Briefcase contents can be mapped to different objects and structures upon import. To compare briefcases with contents as they will appear after mapping, choose a transfer option set that has mapping transformation rules defined. The objects in the briefcases will be transformed according to those rules before comparing.
4. Click **Compare Contents**.

   A comparison of the two briefcases is displayed. Expand and collapse the hierarchy of items in the briefcases to compare them. Color-coded bars identify changed objects in the briefcases:

   - Red identifies items not in the newer briefcase.
   - Blue identifies items not included in the older briefcase.
   - Yellow identifies items that are changed.

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.

Exporting 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.

Importing 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. A primary object exists on one site (the owning site), and replica objects are created on other sites using the **Transfer In** and **Transfer Out** features.

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.

Refer to Multi-Site Collaboration in the Teamcenter help collection for more information on working with Multi-Site Collaboration.

Publishing 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.

Sharing remote objects 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.

Receiving and updating 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.

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.

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 check out and check in remote objects from Structure Manager.
- 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.

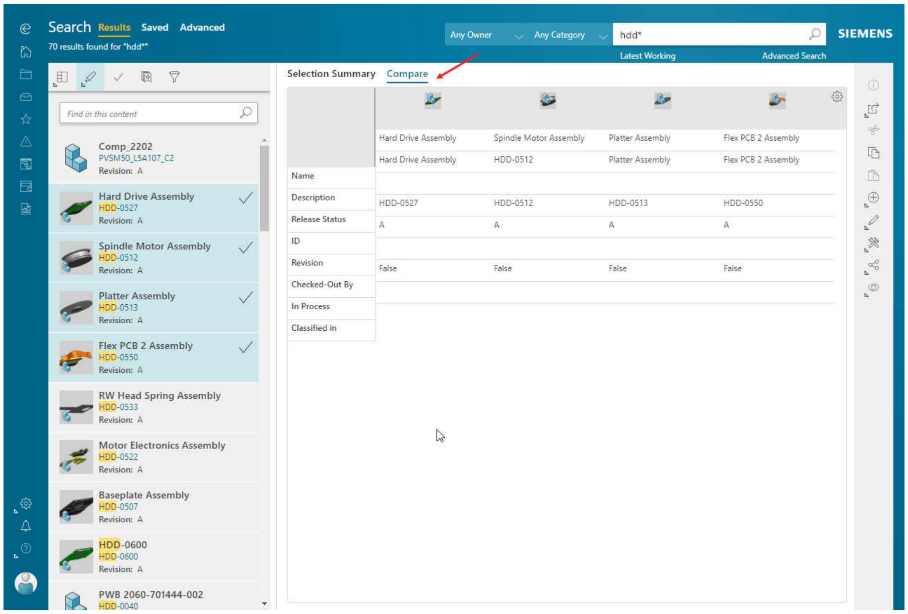
Check in data linked to the object using relations

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

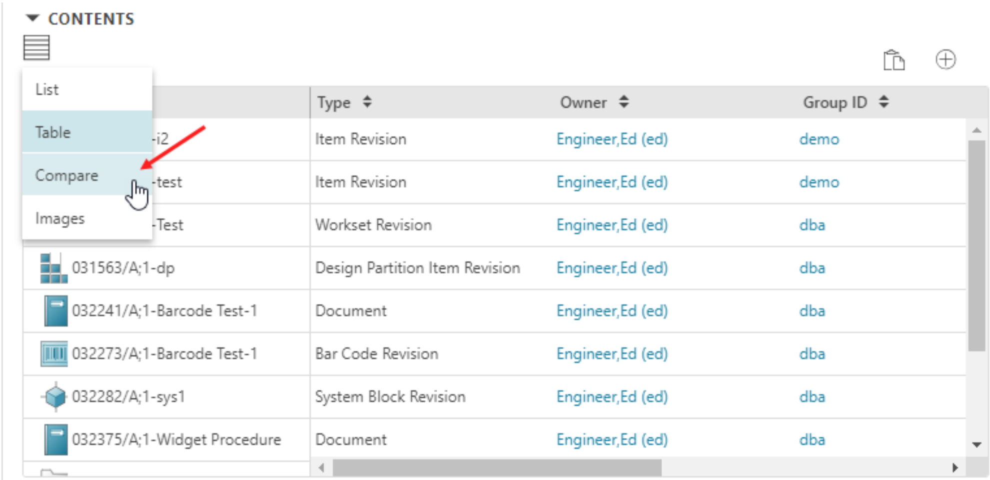
You can compare common properties of objects.

- To compare multiple selected objects from a list, click the **Compare** tab.

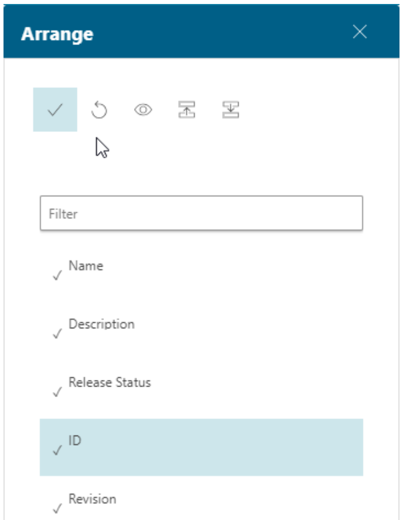


> Note:
>
> While in a comparison display from a list, you can use the list to select additional objects or remove objects.

- 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.

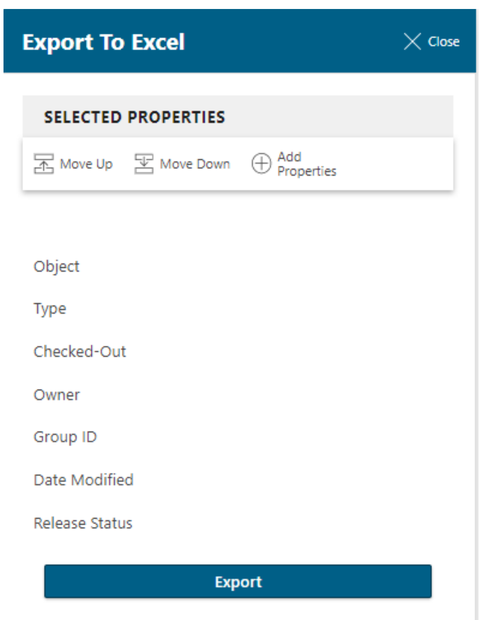
For more information on tracking changes, in the *Change Management* help, see *Review active or closed changes for a structure*.

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.

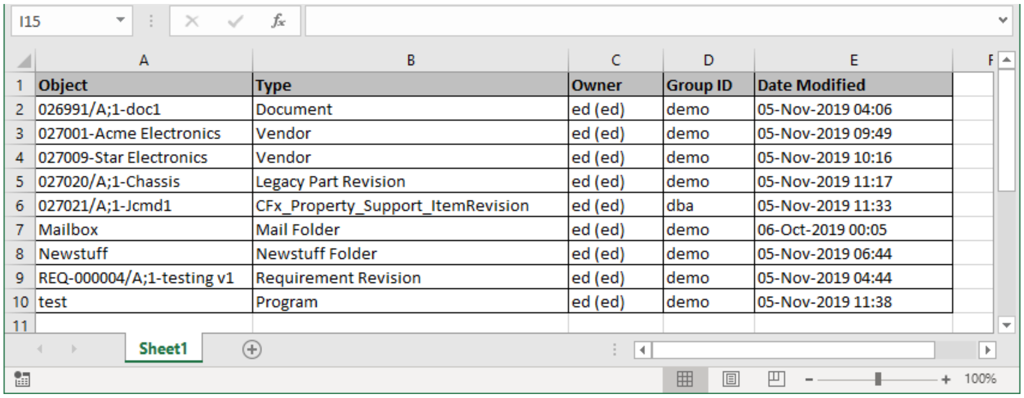


2. Do any of the following:

   - 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.

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 signoff 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

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. In the **Home** page, click the **Reports** tile.

   By default, the available reports are displayed as thumbnails in **My Dashboard**.

   My Modified Objects and **My Group Released Objects** are two such reports that are available by default.

2. To add a report to **My Dashboard**, in **Templates**, select a report, and click **Add to Dashboard**.

3. To open the report, click the report title.

   Alternatively, click **Images**, select **List with Summary**, and select the report.

4. Drill down the report to find specific data.

   Example:

   a. Click the **My Modified Objects** report to open it.

   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.

5. (Optional) To delete the report from **My Dashboard**, select the report from **My Dashboard** and from the primary toolbar, click **Manage** > **Remove Report**.

6. Generate the report.

   a. Select the report and from the primary toolbar, click **Open** > **Open**.

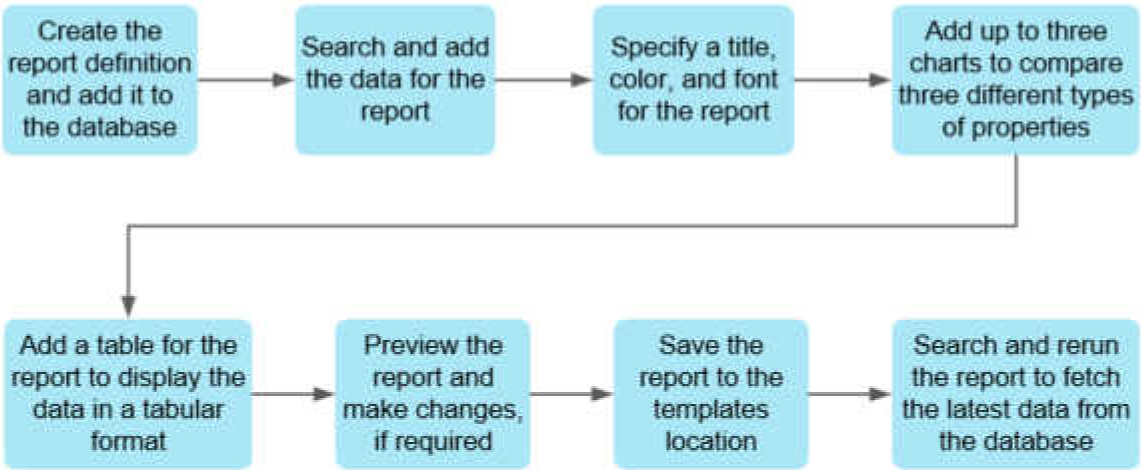
   b. From the primary toolbar, click **New** > **Generate Report**.

Create and generate an active summary report

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 release status of items.

> 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.

The process for creating and generating an active summary report is as follows:



- Create the report definition and add the data for the report
- Select a layout for the report and add charts and a table
- Edit the report from Templates

- Add the report to My Dashboard
- Generate the report

Create the report definition and add the data for the report

1. On the **HOME** page, click the **REPORTS** tile.

2. In **My Dashboard** or **Templates**, click **New** > **Add**.

3. Specify a name for the report (mandatory) and include a description (optional).

4. To create a summary report, select **Active summary report** and click **Add**.

5. 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 **Configure Report** panel, click the **Search Data** tab.

   b. 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 current year	Type:ItemRevision AND “Creation Date”:$THIS_YEAR
All objects created by the logged-on user in the last one month	Owner:$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":$THIS_YEAR
All change requests created in the current year	(Type:ChangeRequestRevision OR Type:ChangeNoticeRevision OR Type:ProblemReportRevision OR Type:Cm0DevRqstRevision) AND "Creation Date":$THIS_YEAR

Select a layout for the report and add charts and a table

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.

1. Select a predefined layout for the report.

    a. In the **Configure Report** panel, click the **Set Layout** tab.

    b. Specify a title, color, and font for the report.

    The system displays the name you have specified for the report as the report title.

2. Add a chart to the report.

    a. In the **CHARTS** area, click **Add** ⊕, and type a title for the chart.

    b. To add a chart type, from the **Type** list, select **Column** or **Line**.

    > Tip:
    >
    > You can select multiple values from this list if you want to generate a chart for similar properties. For example, you can create a line or column chart for both **State** and **Status** type values for a report of all the tasks scheduled.

    c. To add a property for the chart, from the **Chart On** list, select a value, for example, **Type**.

    d. Select the **Set as Thumbnail** option to set a particular chart as a thumbnail in **My Dashboard**.

    This option is selected by default for the first chart.

    You can optionally add up to three charts for the report and select any one of them to be set as a thumbnail in **My Dashboard**.

    e. 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, **Date Modified** and **Group ID**, respectively.

3. To display the data in a tabular format, add a table for the report.

    a. In the **TABLE** area, select column name properties such as **Owner**, **Group ID**, and **Maturity**.

    b. (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.

    c. (Optional) To add additional columns to the table, use the **REPORT_AW_ObjectType_Properties** preference.

4. To preview the report, click the **Show Preview** button.

5. To save the report, click the **Save** button.

   This report is saved in the templates location. You can search for it and rerun the report to generate the latest data.

Edit the report from Templates

1. Navigate to the **Templates** location.

2. Search for the report definition you want to edit, select it, and click **Edit** > **Edit Report**.

3. Make the necessary changes and save the report.

Add the report to My Dashboard

1. In **Templates**, select the report you want to add to **My Dashboard**.

2. Click **Add to Dashboard**.

Generate the report

1. In **Templates**, select the report you want to generate.

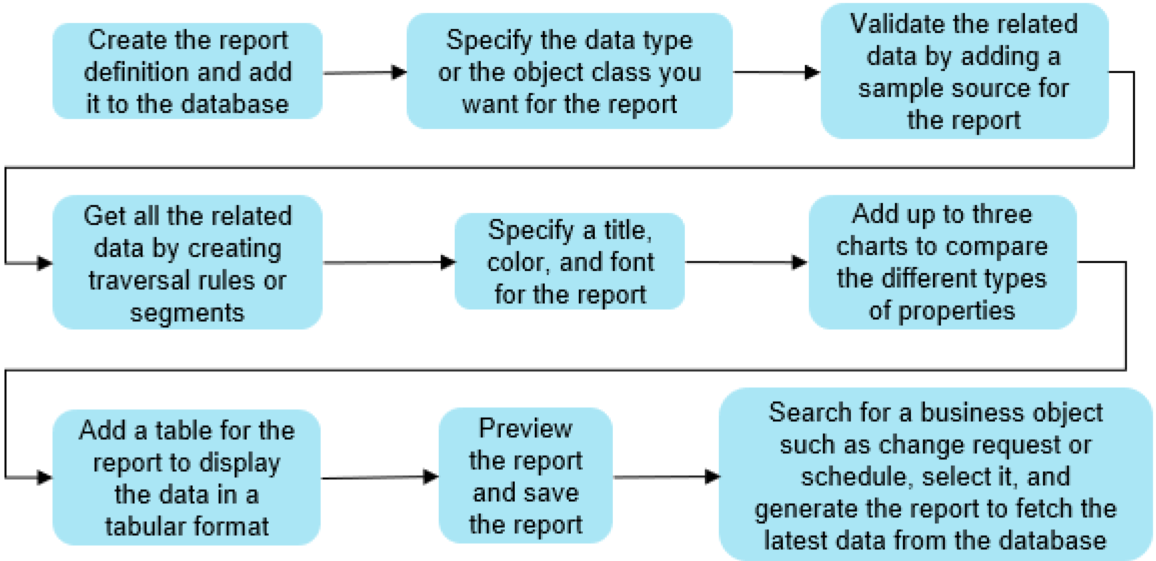
2. To generate the report, click open.

   The report is generated by fetching the latest data from the database.

Create an active item report for schedule tasks

The following is an example of how to create an active item report for the schedule tasks. These tasks have a schedule as a parent object in this example.

The process for creating and generating an active item report is as follows:



- (Optional) Create the sample data for schedule tasks
- Create the report definition and add the data for the report
- Select a layout for the report and add charts and a table
- (Optional) Edit the report from Templates
- Generate the report

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.

1. On the **HOME** page, click the **Schedules** tile.

2. From the primary toolbar, click **New** > **Create Schedule** > **Schedule** and specify the name as **Test_Schedule**.

3. Specify information as appropriate and click **Create**.

4. Open the schedule you created, click the **Tasks** tab, click **Add Schedule Task** and select **Schedule Task**.

5. Specify a name, add other information as appropriate, and click **Add**.

Create the report definition and add the data for the report

1. On the **HOME** page, click the **REPORTS** tile.

2. In **My Dashboard** or **Templates**, click **New** > **Add**.

3. Specify a name for the report and optionally include a description.

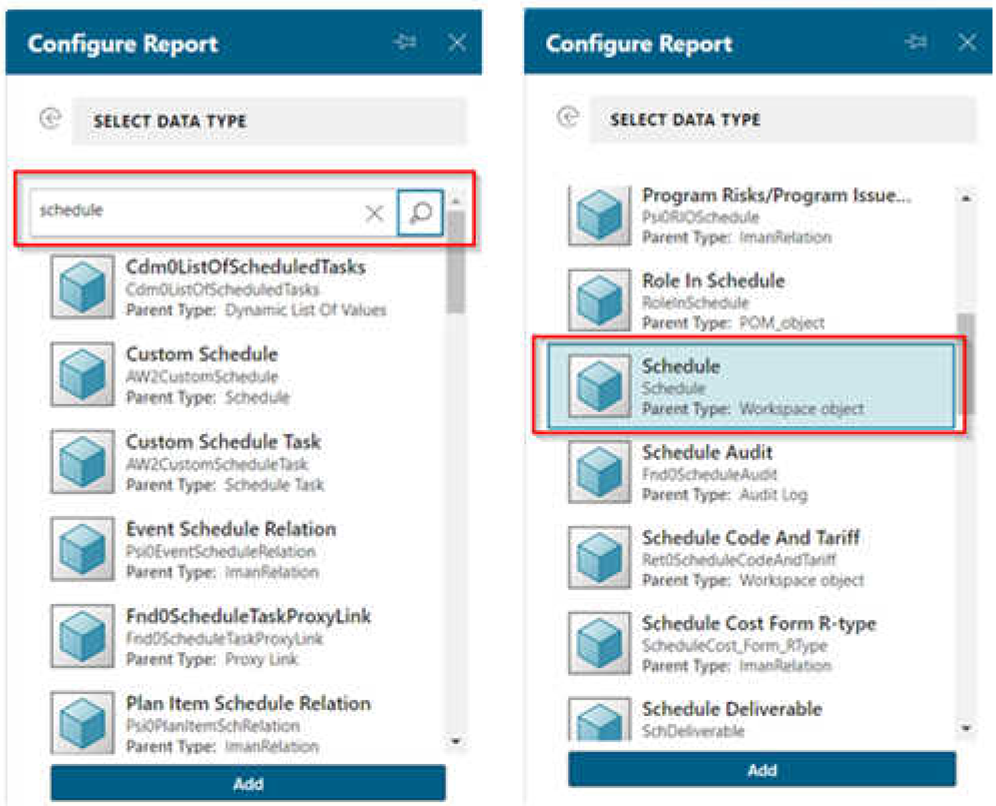
4. To create an item report, select **Active item report** and click **Add**.

5. Search for the data you want to include in the report.

   a. In the **Configure Report** panel, in **Data Type**, click **Add Data Type** ⊕.

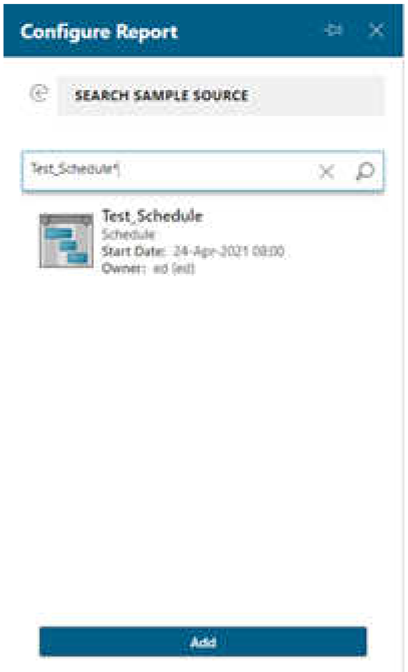
   b. Search for the data type or the object class you want for the report.

      For example, type *schedule* to search for a schedule, select it, and click **Add**.



   c. Add the sample source to validate the related data.

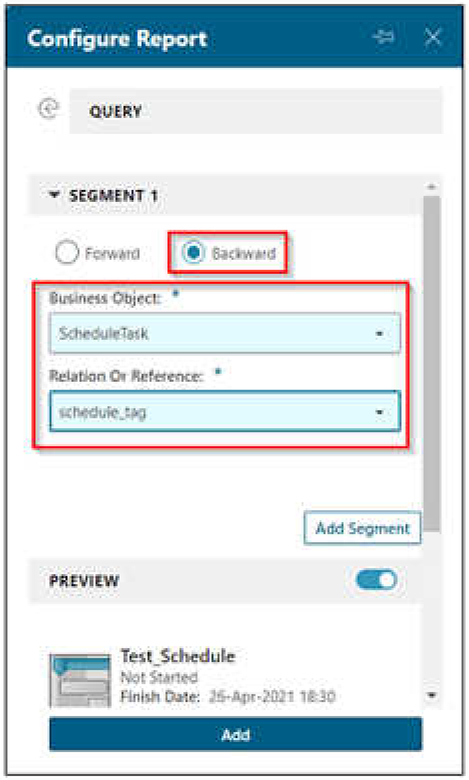
      Click **Add Sample Source** and search for it, for example, *Test_Schedule*. This is the schedule you created in Create the sample data for schedule tasks.

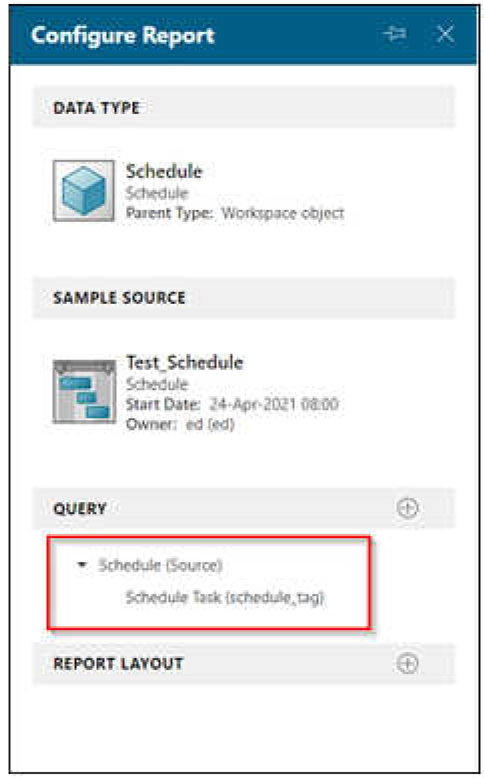


d. Create traversal rules for getting all the related data by adding segments.

In **Query**, click **Add Segment** ⊕ and add segments with values as follows:

Segment 1	
Traversal direction	**Backward**
Business Object	**ScheduleTask**
Relation or Reference	**schedule_tag**





Select a layout for the report and add charts and a table

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.

1. Select a predefined layout for the report.

   a. In the **Configure Report** panel, click the **Set Layout** tab.

   b. Specify a title, color, and font for the report.

      The system displays the name you have specified for the report as the report title.

2. Add a chart to the report.

   You can add up to three charts to compare three different types of properties.

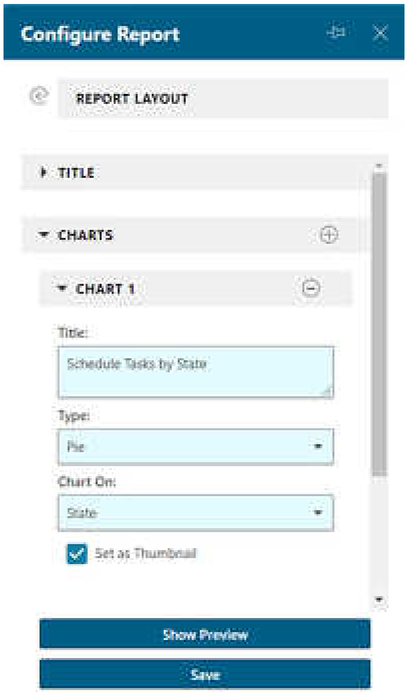
   a. In the **CHARTS** area, click **Add** ⊕, and type a title for the chart.

   b. To add a chart type, from the **Type** list, select **Column** or **Line**.

Tip:

You can select multiple values from this list if you want to generate a chart for similar properties. For example, you can create a line or column chart for both **State** and **Status** type values for a report of all the tasks scheduled.

c. To add a property for the chart, from the **Chart On** list, select a value, for example, **Status**.



d. Select the **Set as Thumbnail** option to set a particular chart as a thumbnail in **My Dashboard**.

This option is selected by default for the first chart.

You can optionally add up to three charts for the report and select any one of them to be set as a thumbnail in **My Dashboard**.

Note:

The **Set as Thumbnail** option is not supported for the current release.

e. 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, **Status** and **Work Complete Percent**, 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.

3. To display the data in a tabular format, add a table for the report.

   a. In the **TABLE** area, select column name properties such as **Object**, **Task Type**, **Description**, **State**, and **Status**.

   b. (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.

   c. (Optional) To add additional columns to the table, use the **REPORT_AW_ObjectType_Properties** preference.

4. To preview the report, click the **Show Preview** button.

5. To save the report, click the **Save** button.

   This report is saved in the templates' location.

Edit the report from Templates

1. Navigate to the **Templates** location.

2. Search for the report definition you want to edit, select it, and click **Edit** > **Edit Report**.

3. Make the necessary changes and save the report.

Generate the report

1. Search for the schedule for which you want to generate the report.

2. Select the program, and click **New** > **Generate Report**.

3. Select the report you created and click **Generate**.

   The report is generated by fetching the latest data from the database.

4. (Optional) Create another schedule task.

   a. Open the schedule you created, click the **Tasks** tab, click **Add Schedule Task**, and select **Schedule Task**.

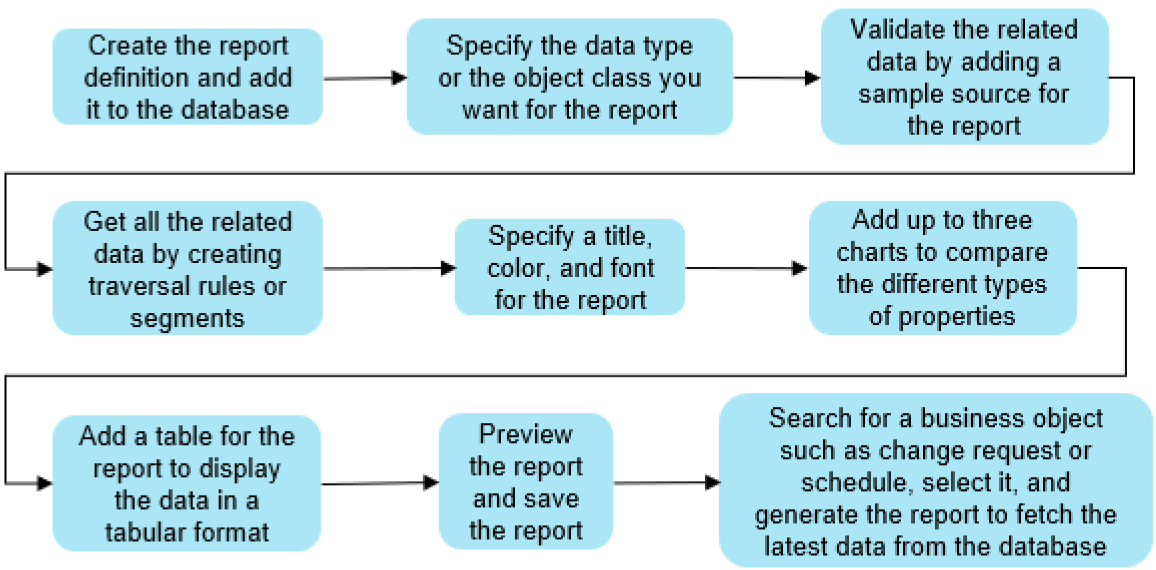
b. Specify a name, add other information as appropriate, and click **Add**.

5. (Optional) Run the report again to see the new scheduled task.

Create an active item report for change requests

The following is an example of how to create an active item report for change requests. These change requests have part revisions as a problem item in this example.

The process for creating and generating an active item report is as follows:



- (Optional) Create the sample data for the change request
- Create the report definition and add the data for the report
- Select a layout for the report and add charts and a table
- (Optional) Edit the report from Templates
- Generate the report

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.

1. Select **Folders** and from the primary toolbar, click **New** > **Add** > **Part** and specify the name as **Test_Part**.

2. 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**.

Create the report definition and add the data for the report

1. On the **HOME** page, click the **REPORTS** tile.

2. In **My Dashboard** or **Templates**, from the primary toolbar, click **New** > **Add**.

3. Specify a name for the report and optionally include a description.

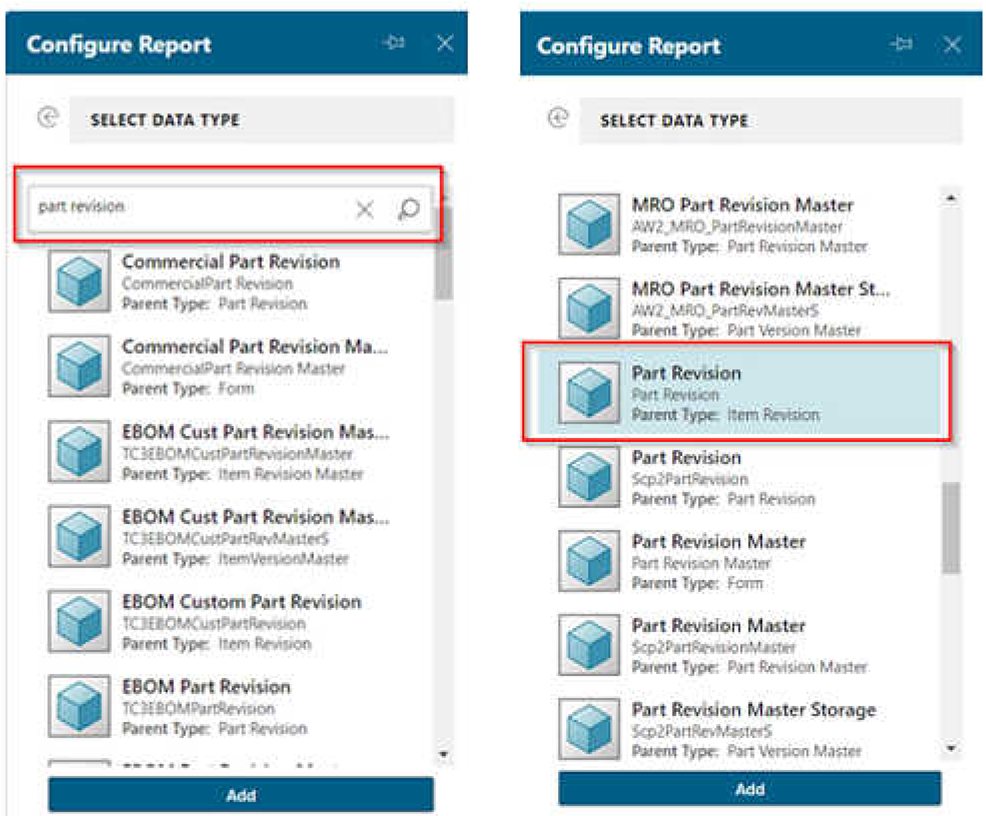
4. To create an item report, select **Active item report** and click **Add**.

5. Search for the data you want to include in the report.

   a. In the **Configure Report** panel, click **Add Data Type** ⊕.

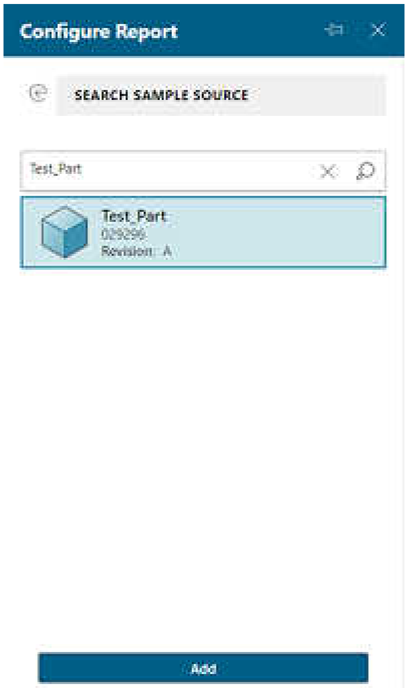
   b. Search for the data type or the object class you want for the report.

      For example, type *part revision* to search for a part revision, select it, and click **Add**.



   c. Add the sample source to validate the related data.

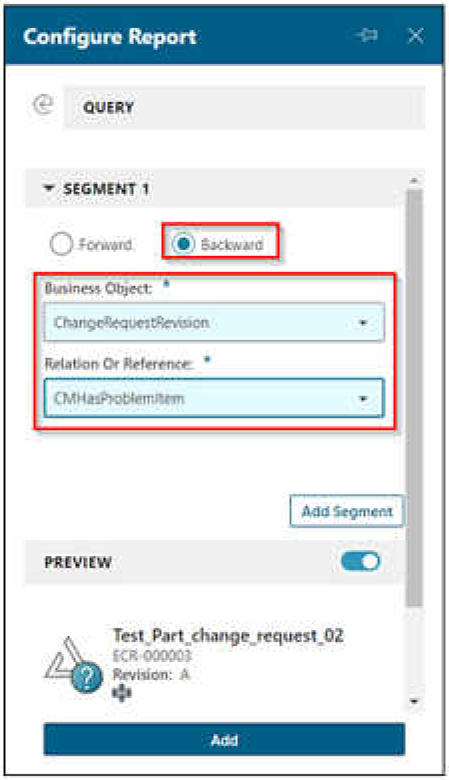
      In **Sample Source**, click **Add Sample Source** ⊕ and search for it, for example, *Test_Part**. This is the part you created in Create the sample data for the change request.

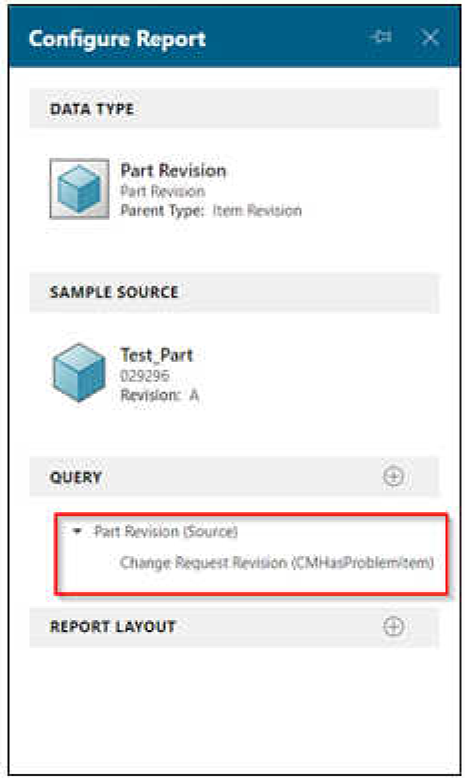


d. Create traversal rules for getting all the related data by adding segments.

In **Query**, click **Add Segment** ⊕ and add segments with values as follows:

Segment 1	
Traversal direction	**Backward**
Business Object	**ChangeRequestRevision**
Relation or Reference	**ProblemItem**





Select a layout for the report and add charts and a table

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.

1. Select a predefined layout for the report.

   a. In **Report Layout**, click **Report Layout** ⊕.

   b. In the **Configure Report** panel, specify a title, color, and font for the report.

      The system displays the name you have specified for the report as the report title.

2. Add a chart to the report.

   You can add up to three charts to compare three different types of properties.

   a. In the **CHARTS** area, click **Add** ⊕, and type a title for the chart.

   b. To add a chart type, from the **Type** list, select **Column** or **Line**.

> Tip:
>
> You can select multiple values from this list if you want to generate a chart for similar properties. For example, you can create a line or column chart for both **Closure** and **Disposition** type values for a report of all the schedule tasks.

c. To add a property for the chart, from the **Chart On** list, select a value, for example, **Maturity**.

d. Select the **Set as Thumbnail** option to set a particular chart as a thumbnail in **My Dashboard**.

   This option is selected by default for the first chart.

   You can optionally add up to three charts for the report and select any one of them to be set as a thumbnail in **My Dashboard**.

   > Note:
   >
   > The **Set as Thumbnail** option is not supported for the current release.

e. 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, **Disposition** and **Closure**, 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.

3. To display the data in a tabular format, add a table for the report.

   a. In the **TABLE** area, select column name properties such as **Maturity**, **Disposition**, **Closure**, and **Creation Date**.

   b. (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.

   c. (Optional) To add additional columns to the table, use the **REPORT_AW_ObjectType_Properties** preference.

4. To preview the report, click the **Show Preview** button.

5. To save the report, click the **Save** button.

This report is saved in the templates' location.

Edit the report from Templates

1. Navigate to the **Templates** location.
2. Search for the report definition you want to edit, select it, and click **Edit** > **Edit Report**.
3. Make the necessary changes and save the report.

Generate the report

1. Search for the part revision for which you want to generate the report.
2. Select the change request and from the primary toolbar, click **New** > **Generate Report**.
3. Select the report you created and click **Generate**.

   The report is generated by fetching the latest data from the database.
4. (Optional) 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**.
5. (Optional) Run the report again to see the new change request.

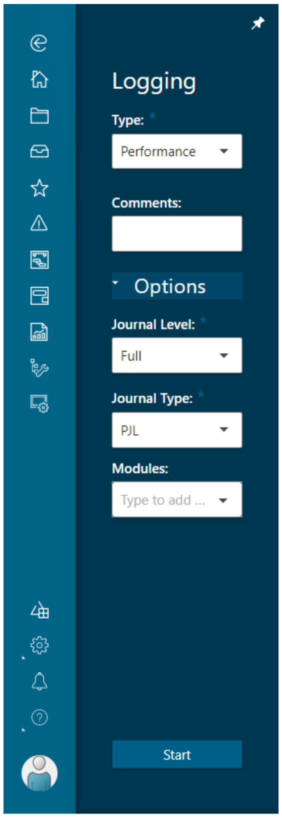
Troubleshooting

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:

- 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

> 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.

System administrators use Audit Manager to create audit logs. Audit logs track what information has changed and who has changed the information.

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** stylesheet 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** stylesheet 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>
```

Viewing access rights

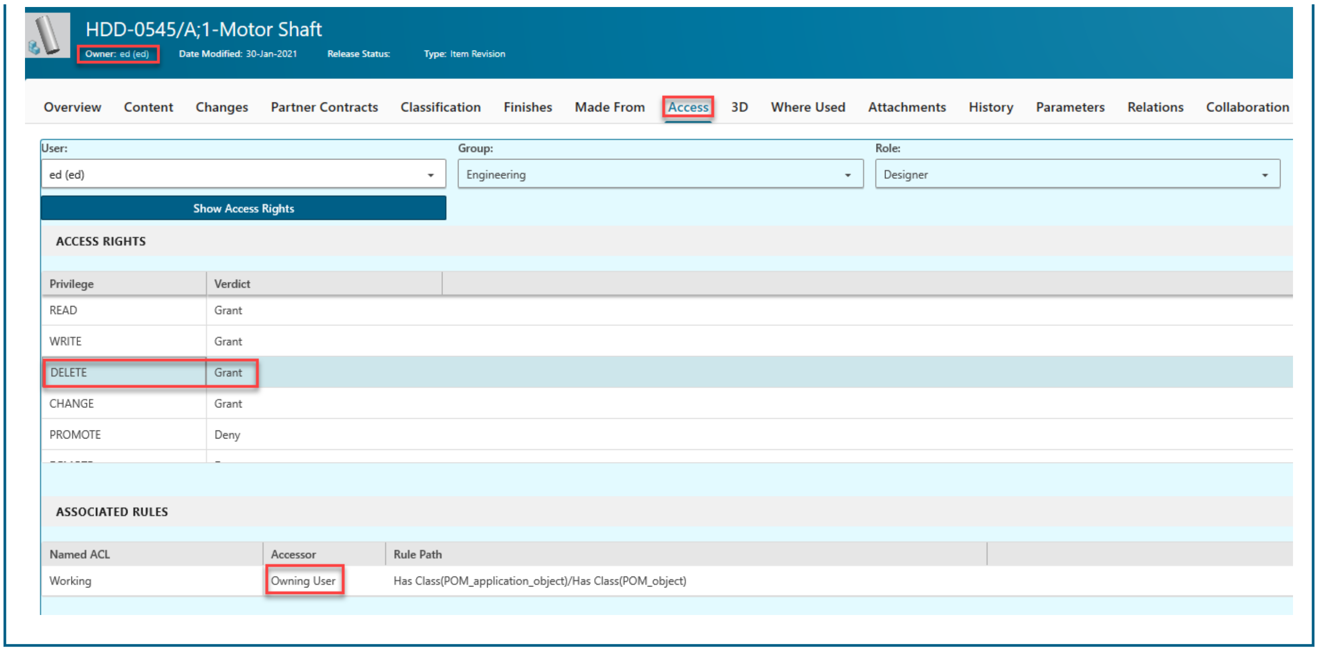
If your administrator has enabled the **Access** tab and granted you access, you can view access rights on a selected object in Active Workspace by clicking the **Access** tab.

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

Performing project tasks

In Active Workspace, if you are a privileged member in one or more projects, use the **PROJECTS** tile to access your projects and perform the following tasks:

- Create projects and programs.
- Modify projects and programs:
  - Edit project and program properties and team members
  - Assign or remove objects to or from projects
  - Assign or remove assemblies to or from projects
  - Assign a project during a Save As operation
  - Apply project-level security to selected objects
  - Assign a project when creating a revision
  - Set or change an owning program

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 from the **PROJECTS** tile:

1. Click **New** > **Add Project** using the primary toolbar. Or, you can click **Add Project** from the results panel toolbar.

   To create multiple projects or programs, use the **Pin Panel**.

2. Enter the properties for the new project or program.

   You cannot name your new project or program using the same name as a group in your organization.

3. (Optional) Enter a project category:

   Project categories allow you to control access to objects in a project without using access control rules. You can restrict a user from objects based on the category of the project. You can define project categories using the **Fnd0ProjectCategories** list of values (LOV).

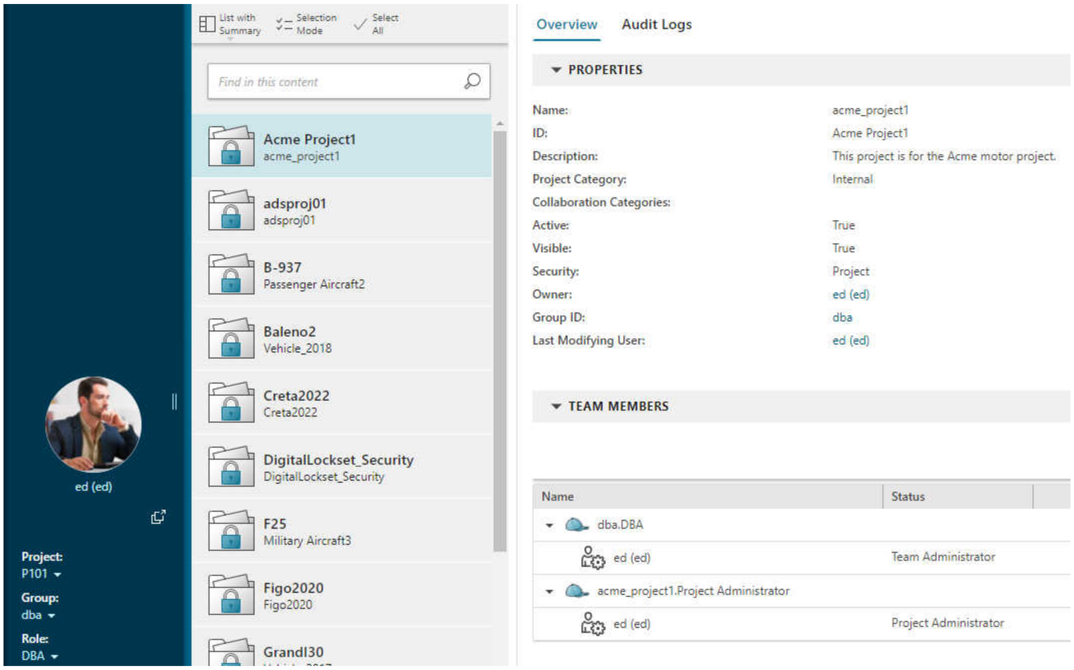
   - **Internal**
   - **Partner**
   - **Supplier**

4. From the **Security** section, select either **Project** (default) or **Program**.

5. Click **Add**.

   The created project or program appears at the top of the **Projects** list and is highlighted. By default, it is set to **Active** and **Visible**.

   You are also added in the **TEAM MEMBERS** section as both the **Project Administrator** and **Team Administrator** for the newly created project or program.

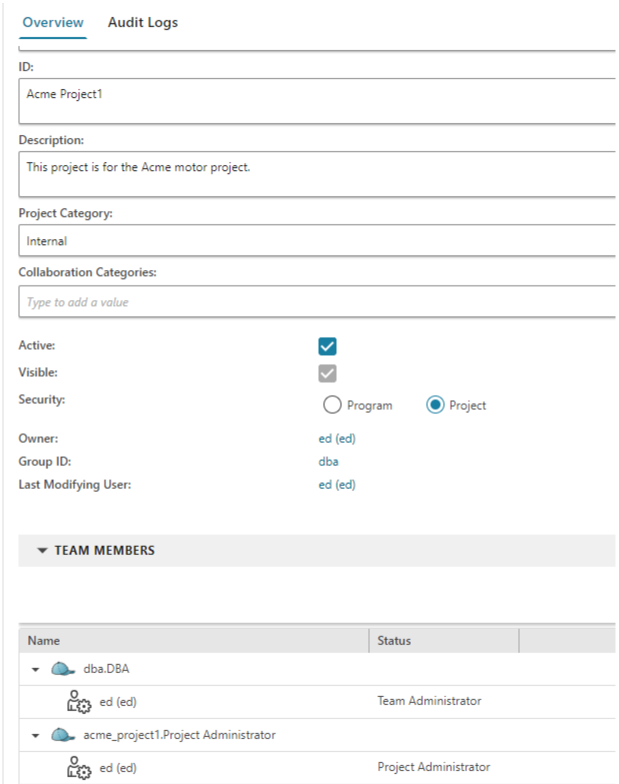


Modify projects and programs

Edit project and program properties and team members

From the **Overview** tab, you can:

- Edit your project or program properties.
- Add, modify, or remove team members and assign status.



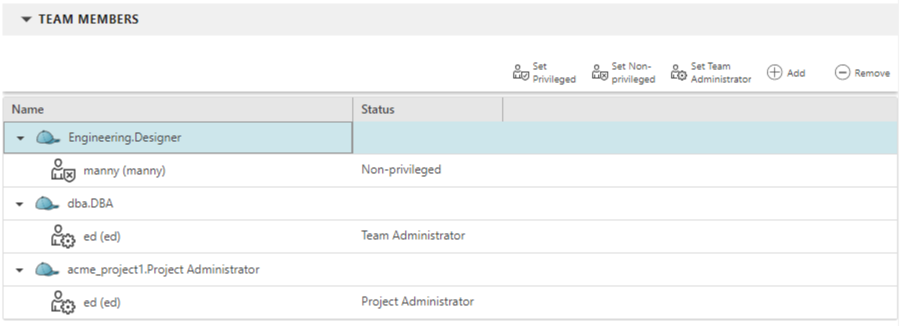
Edit your project and program properties

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, modify, or remove team members and assign status

In the **TEAM MEMBERS** section, you can add members from your organization by clicking **Add** to display the **Organization** panel. As the creator of the project or program, you are automatically assigned both **Project Administrator** and **Team Administrator** status.



Status	Tasks
Project Administrator or project owner	Modify the project properties and perform the **Team Administrator** tasks.
Team Administrator	Perform the team management activities, such as adding members, removing members, and assigning status. You change the status of your team members from **Non-privileged** to **Privileged**. In addition you can set a user as a team administrator, and you can add and remove users from your team.

Assign or remove objects to or from projects

If you are a privileged member in one or more projects, you can *assign* 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. 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. 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.

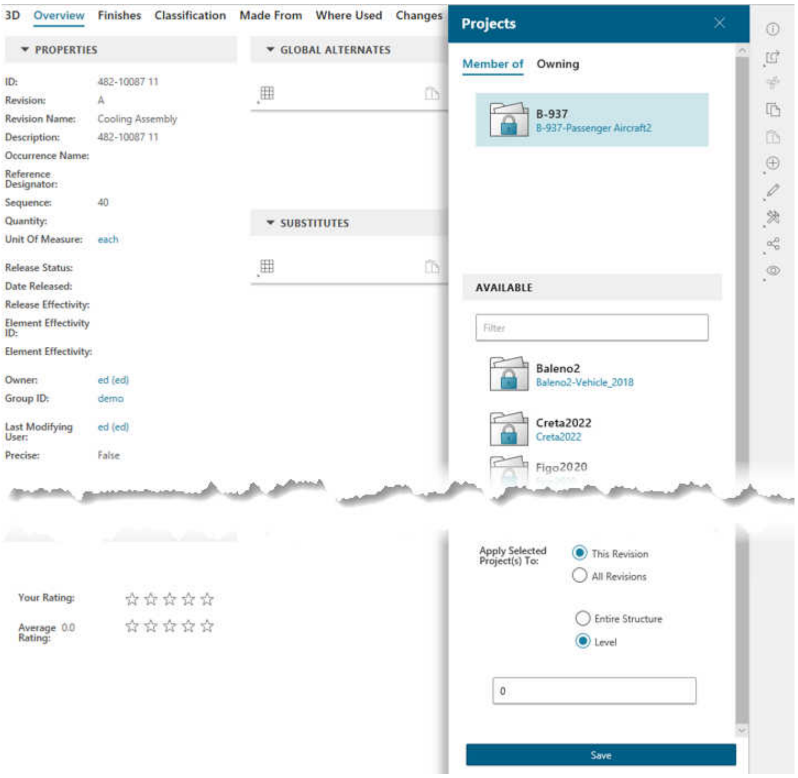
4. Associate the assembly with **This Revision** or **All Revisions**. In addition, you can select either **Entire Structure** or at the item level (**Level**).

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** dialog box, 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 an assembly.
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**.

   Note:

   You can select multiple assemblies.
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 **Revise**.
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. To do this:

- 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.

5. Communicating across your organization

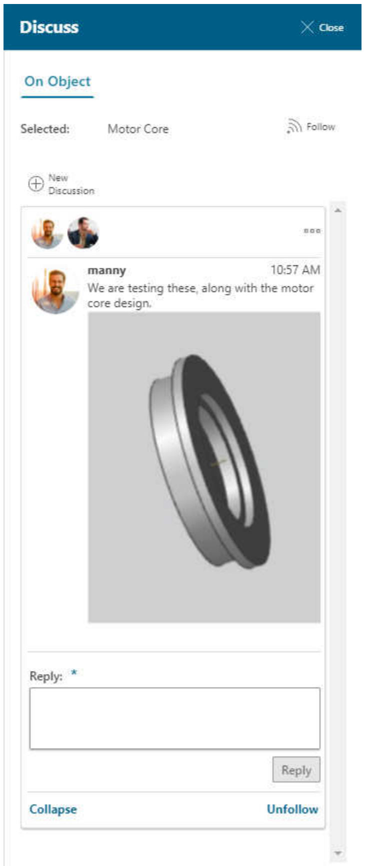
Using Active Collaboration

What is Active Collaboration?

Active Collaboration is an optional feature of Active Workspace installed by your administrator. It is an internal collaboration application, which allows you to create discussions on selected objects in Active Workspace, such as items, parts, and documents. The discussions can be public or private and are used to interact with people inside and outside of your team. For example, you can interact with your project team, management, and suppliers to review product content or obtain technical information. Specifically, as an engineer, you can use Active Collaboration to:

- Create discussions on selected parts to communicate and gain feedback with either specific team members or persons outside of your team.
- Maintain a record of discussions and replies from multiple users about selected parts.
- Track discussions with a status (**Open**, **In Progress**, and **Closed**) if you need to track an action.
- Receive automated messages showing changes to a discussion, such as participants added or removed, changes to privacy, and status and priority changes on tracked discussions.

Use **Follow** on the **Discuss** panel to follow all discussions.



What are the benefits of Active Collaboration?

Following are some of the benefits provided by Active Collaboration:

- Provides a secure location for technical discussions without using public networks
- Offers a way to share ideas and comments in the context of your Teamcenter entities
- Encourages discussion among coworkers and reduces the time spent on in-person meetings
- Allows for a more efficient means of sharing ideas and comments rather than using traditional avenues such as email

Where can I add discussions?

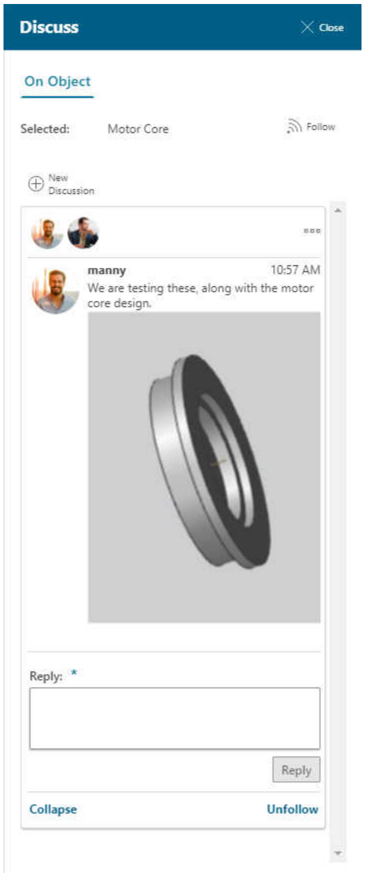
In Active Workspace, you can add a discussion on business object types, such as:

- Design revisions
- Document revisions
- Item revisions

Discuss in Active Workspace

From the **Discuss** panel in Active Workspace, you can:

- Create a new discussion.
- Create a tracked discussion.
- View and reply to a discussion.
- Review automated messages.
- Follow a particular discussion or all discussions on an object.
- Unfollow a particular discussion or all discussions on an object.
- Delete a discussion.



Create a new discussion

You can create a discussion on an Active Workspace object, such as a part or a document.

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 the **Add Source** ⊕ to add an additional source object to the discussion.

4. (Optional) Click **Add Participant** ⊕ to add a participant to the discussion. Select the participant and click **Add**.

5. (Optional) Click the **Private Message** box to restrict the participants in the discussion. Only the selected participants can participate in the discussion. In addition, participants in a 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 dropdown list.

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.

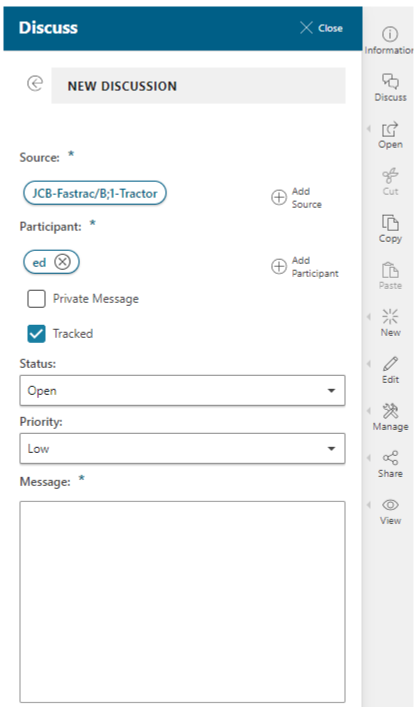
   The new discussion appears on the Discuss panel. Each discussion has a timestamp and new discussions appear at the top of the list. As the creator of the discussion, you are automatically set to follow all replies in the new discussion.

Create a tracked discussion

Note:

You can track a discussion only if your administrator has configured this feature using the **Ac0EnableTrackedDiscussions** preference.

Use tracked discussions to track the status and priority of a discussion. For example, if you need to make an adjustment to a part, you can create a discussion with the engineer and request a modification. To change the status of the discussion, you can edit the discussion and change the status to either **In Progress** or **Closed**. When a discussion is set to **In Progress**, a green bar appears next to the discussion when it is viewed using the **Tracked** tab. When the tracked discussion is set to **Closed**, a gray bar appears next to the discussion when it is viewed.



To create a tracked discussion from the **Discuss** panel:

1. Click **Tracked**.

   The **Status** and **Priority** dropdown lists are displayed.

2. Set the **Status** value as **Open** (default), **In Progress**, or **Closed**.

3. Select the **Priority** value as **Low** (default), **Medium**, or **High**.

4. Optionally, you can select **Private Message** to restrict the discussion to the participants you select.

View and reply to a discussion on a selected object

1. You can view discussions either by:

   - Clicking **Discussions** on the global navigation toolbar to display the **Discuss** panel and view all discussions.

   - Clicking **Discuss** on the on the primary toolbar to view discussions on a selected object.

   The most recent discussion appears at the top of the discussion list.

2. (Optional) If the discussion is a private message, you can hover over the people icon to determine the recipients of the discussion message.

3. Click **Reply** to reply to a discussion.

Review automated messages

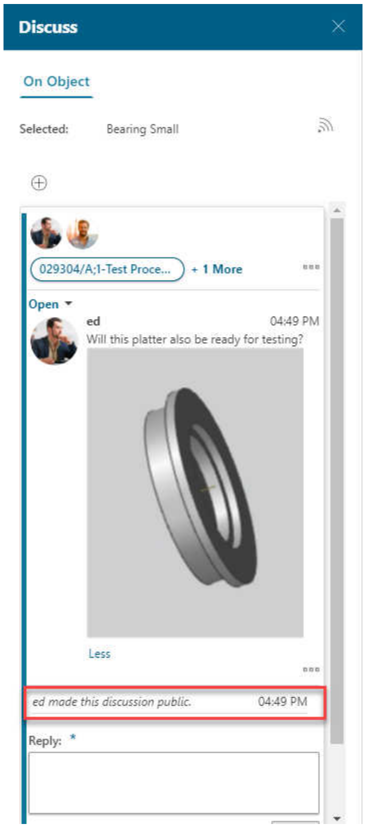
Automated messages inform you of updates. These messages are generated when:

- A participant list changes.

- The public or private status changes.

- Either of the tracked fields changes (**Status** and **Priority**).

For example, Ed made the following discussion public 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

Follow allows you 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.

> Note:
>
> You can receive notifications on *all discussions* or *a particular discussion*.

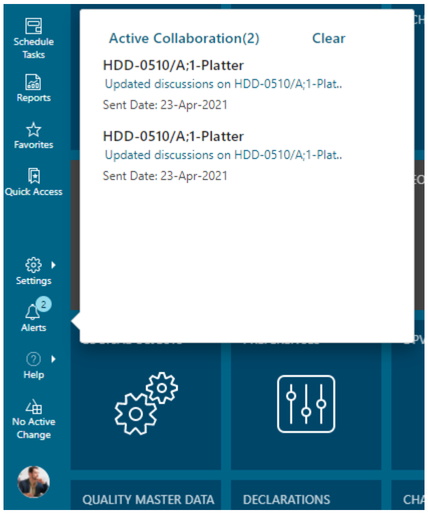
1. Select the object and click **Discuss** on the primary toolbar to display the **Discuss** panel.

2. To receive notifications:

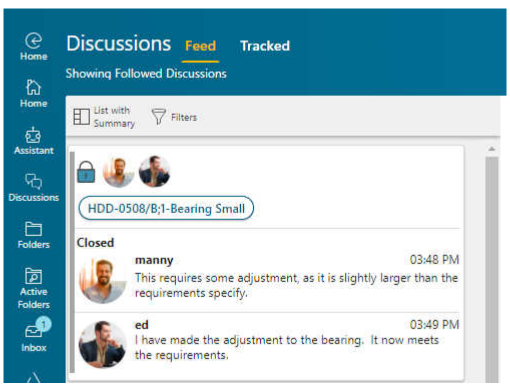
   - On *all discussions* about the object, click **Follow** next to the name of the selected object.

   - On *a particular discussion*, click **Follow** within the selected replies.

   When you follow a discussion, you are notified of replies via the Alerts button on the global navigation toolbar.



You are also notified of discussions in the Discussions location by clicking either **Discussions** on the global toolbar 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.



Unfollow a discussion

You can unfollow a discussion associated with the source object 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 at any time to stop receiving notifications, click **Follow** next to the selected discussion or discussions.
To unfollow a discussion from the Feed or Tracked panel	Click **Unfollow** at the bottom of the discussion.

Delete a discussion

> Note:
>
> You are only able to delete a discussion if your administrator has configured this delete option for your group and role using the **Ac0DeleteDiscussionGroupRole** preference. When a discussion is deleted, it and all replies are deleted.

You can delete a discussion from the **Feed** or **Tracked** tab, **Discussions** location, or the **Discuss** panel associated with the source object.

- Delete a discussion from the **Feed** or **Tracked** tab:
    - Select the discussion you wish to delete and click **More** > **Delete**.
- Delete a discussion from the **Discussions** location or 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.

View discussions in the Discussions location

The **Discussions** location changes depending on whether the tracked discussion feature is enabled.

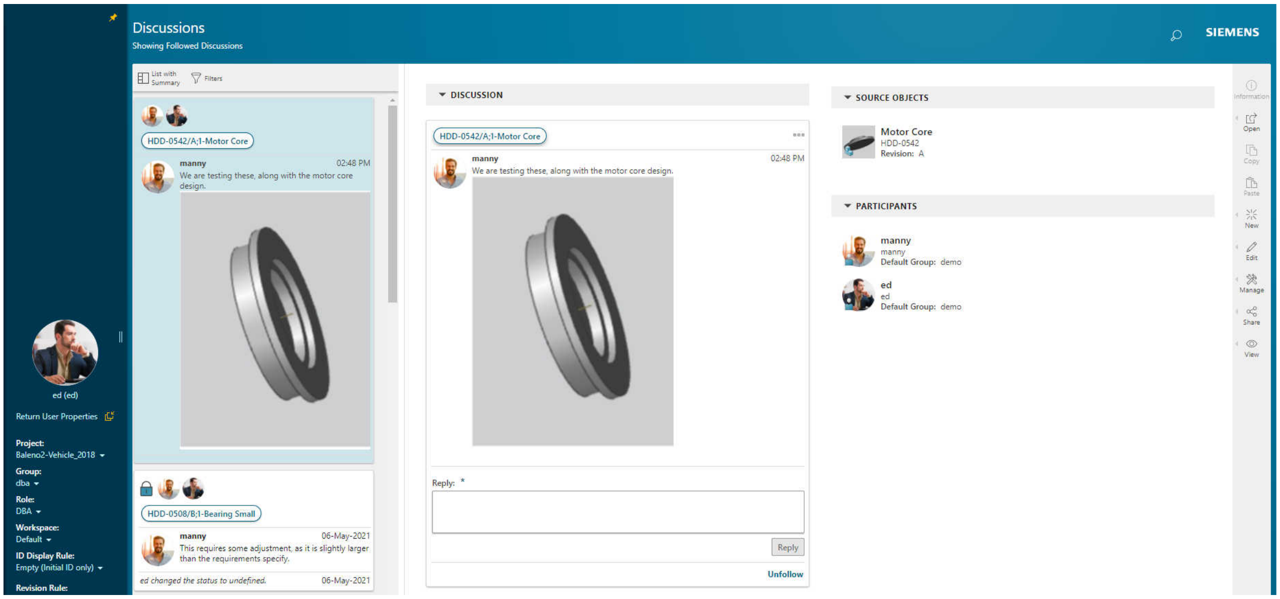
> Note:
>
> By default, tracked discussions is disabled. Your administrator can enable tracked discussions using the **Ac0EnableTrackedDiscussions** preference.

View discussions with tracking disabled

To view discussions:

1. Click either **Discussions** or the **DISCUSSIONS** tile.

   The most recent discussion is highlighted.

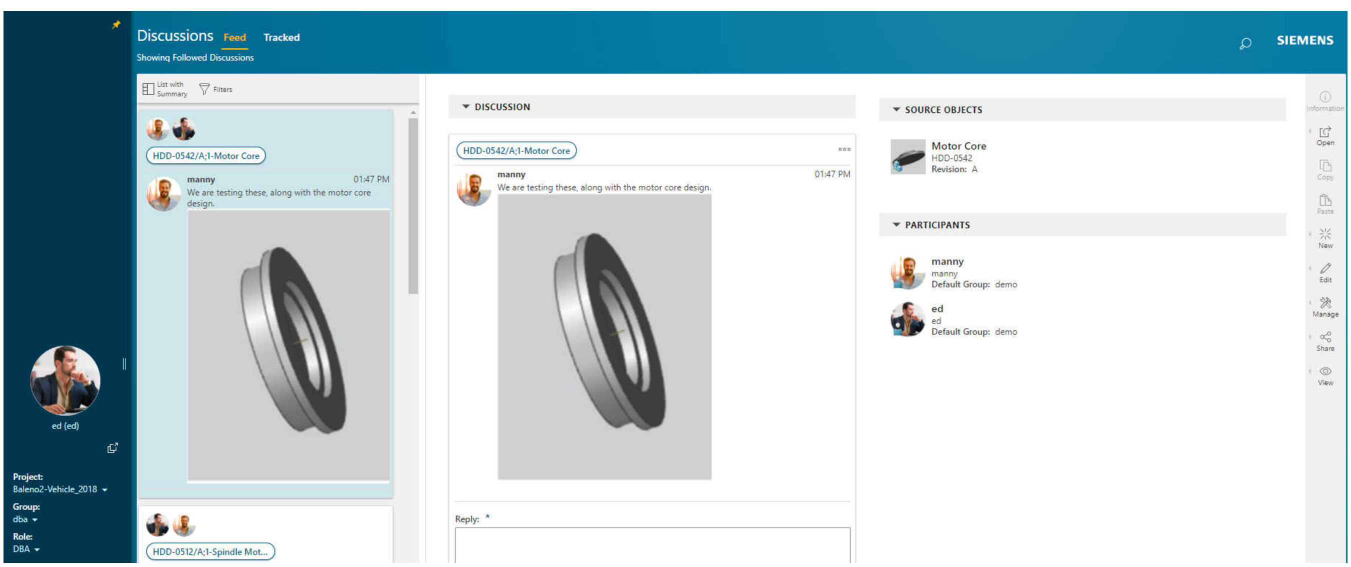


2. Click **Filter** to filter on the following:

   - **Participants**
   - **Private**
   - **Created Before**
   - **Created After**

View discussions with tracking enabled

To view discussions, click either **Discussions** or the **DISCUSSIONS** tile.



Feed tab	All discussions being followed appear in the **Feed** tab starting with the most recent discussion. The selected discussion appears in the **DISCUSSION** section where you can reply to the discussion.
Tracked tab	All tracked discussions being following appear in the **Tracked** tab starting with the most recent discussion. The priority can be **Low**, **Medium**, or **High**.
Filter	Click **Filter** 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**

Using Subscription

What are subscriptions?

The Subscription feature lets you receive notification, in near real time using external email or news feed, when data is modified by another user or as the release status of an item revision changes.

You can:

- Create subscriptions to objects.
- Subscribe to an object class.
- Manage subscriptions.

You can 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.
- A comment (question, answer, or comment) is added to an item.

Set your subscription notification method and retention time

Set your subscription notification method and retention time (in days) from the **SUBSCRIPTIONS** area on your **Profile** page.

You can choose whether to receive notifications of your subscriptions by:

- Email
- News feed (default)
- Email and news feed

Also, you can select the option of receiving daily and weekly digests that collate all notifications. These digests are available in both Active Workspace and the rich client.

Create a subscription to follow an object

You can subscribe to follow one or multiple objects at a time. 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.

1. Choose an object to follow and select which event type you want to follow, the frequency, and the priority. You can also add other users as followers.

   - **Event Type**
     Select a single event from this drop-down list.

     > Note:
     >
     > If you are already subscribed to an event type, that event type does not appear in the **Event Type** list.

   - **My Events**
     Select My Events to follow multiple events on an object.
   - **Name**
     An editable prepopulated field is displayed when only a single object is selected for following.
   - **Frequency**
     Select from **Immediately** (not collated), **Daily** (daily digest), and **Weekly** (weekly digest). The default is **Immediately**.
   - **Priority**
     Select from **Normal**, **High**, and **Low**. The default is **Normal**.
   - (Optional) In the **FOLLOWERS** section, click **Add Follower** ⊕ to add 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 and click **Add**.

2. To verify your subscription was created, click the **SUBSCRIPTION** tile on your home page. Your subscription appears in the **My Subscriptions** tab.

3. (Optional) If you now want to follow an additional event type on the same object, notice the **Follow** panel does not display the event types that are currently selected for following.

Unfollow a subscription

Select the subscription you want to unfollow and do one of the following:

- From the list of subscriptions, click the **Unfollow** icon.
- From the **FOLLOWERS** area, click the **Unfollow** button.

Follow item or item revision

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** you want to follow, the frequency, and the priority. You can also add other users as followers. Then, click **Follow**.

4. Select My Events to follow multiple events on a type.

5. (Optional) You can select **Edit** to edit the properties, criteria, and followers. When you are finished editing, click **Edit** > **Save Edits**.

   a. To add criteria properties for a type-based subscription, click **Add** in the **CRITERIA** section. From the **Add criteria** panel, select a logical operator (**AND** or **OR**).

   b. Select a property.

   > Note:
   >
   > The subscribable properties displayed are those configured by your administrator.

   c. Select an operator. The operator selections are dependent on the property selected.

   d. Enter the value and click **Add** to save the row of values in the **CRITERIA** section.

   Click **Add** to add additional rows for the criteria and select **Edit** > **Save Edits**.

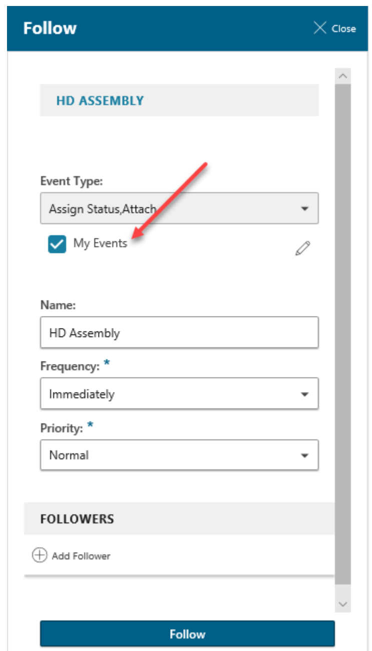
   > Note:
   >
   > - You can have multiple values, change the order of the rows, and remove criteria rows.
   > - News Feed for subscriptions containing **OR** values in the **Criteria** contains a pipe (**|**) character instead of **OR** in the **Criteria Value** field.

Assign events to My Events list

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, **HD 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.

4. Select the **My Events** check box to follow all the configured events.

5. Once you have a selected list of events to follow, click back 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.

View and delete notifications and subscriptions in Active Workspace

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.

Filter news feed notifications

The **Filters** panel allows you to 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. 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).

2. Select from the different categories. For example, by selecting **Subscription Manager**, you only see notifications pertaining to Subscription Manager.

3. 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.

Using the Alerts button

The **Alerts** button appears in the global navigation when the **AWS_Notifications_Polling_Interval** preference is set to a given number of minutes, specifying how frequently the system is polled for notifications, site wide. If set to **0**, the **Alerts** button is not visible.

A number indicator to the right of the **Alerts** button appears when:

- Print notifications are received.
- Document Management notifications are received.
- News Feed notifications to which you have subscribed are received.
- There are any existing unread notifications.

When Print, and News Feed notifications are received, they are displayed as a pop-up on the **Alerts** button .

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 either **Print** or **News Feed** on the pop-up to see details on the notifications.

If you click the object, the target page for the object displays.

> Note:
>
> - When you click on a notification, the counter is decreased by one (1).
> - To clear all notifications on the pop-up list for either **News Feed** or **Print**, click **Clear**.
> - A maximum of 10 alerts is displayed per category.

Modifying your subscriptions

Add followers

From the **SUBSCRIPTION** tile on your home page, you can add additional followers to one of your existing subscriptions on the **My Subscriptions** page using edit mode. These followers can view the subscriptions to which they have been added by selecting the **Added As Follower** tab from the **SUBSCRIPTION** tile on their home page.

Add an expiration date

You can add an expiration date to each of your subscriptions.

> Note:
>
> An administrator needs to enable this feature using the **SCM_expiration_date** preference.

1. Select a subscription from your **My Subscriptions** tab. Change your view to **Table with Summary** view. This enables you to sort your subscriptions by fields, such as **Name**, **Event Type**, and **Expiration Date**, which you can order using **Arrange**

2. Edit the table to add an expiration date for the desired subscription.

   > Note:
   >
   > If you want to change your subscription to inactive, clear the **Is Active** check box.

Change subscription owner

You can change the owner of your subscription. This is helpful if you are leaving the project or the company.

1. Select a subscription from the **My Subscriptions** tab and click **Manage** > **Change Owner**.

2. Select the new owner from the **Change Owner** panel, and click **Transfer**.

   This immediately removes the subscription from your **My Subscriptions** list.

Transfer notification

You can temporarily transfer notification of 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. Select a subscription from the **My Subscriptions** tab and click **Share** > **Transfer Notification**.

2. Select the start and end dates for the transfer notifications and add a follower as a temporary notifier.

6. Accessibility and 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, which are as follows:

- **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**.

- **Understandable.** Ensures that information is easily understandable by using clear and concise text, tooltips, and offering **navigation assistance** when needed.

- **Operable.** Ensures that the Active Workspace functionality is available for multiple input methods and provides **keyboard-based navigation** and functionality for other input methods.

- **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

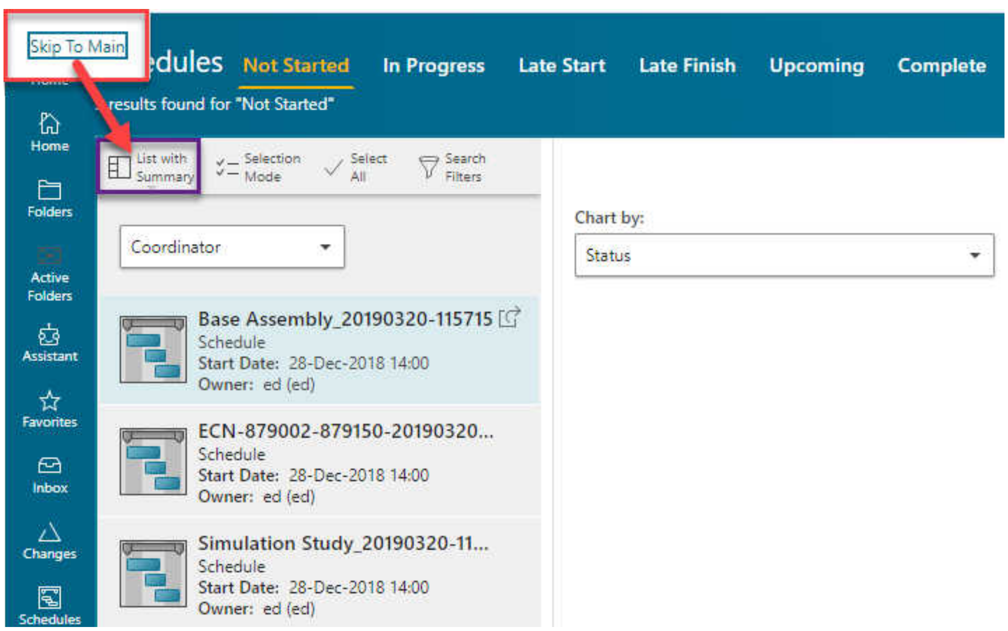
You can navigate the Active Workspace user interface using minimal keyboard keys, such as **Tab**, the **Spacebar**, the arrow keys, and **Enter**. As you navigate through the page, the areas highlight to show your location.

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

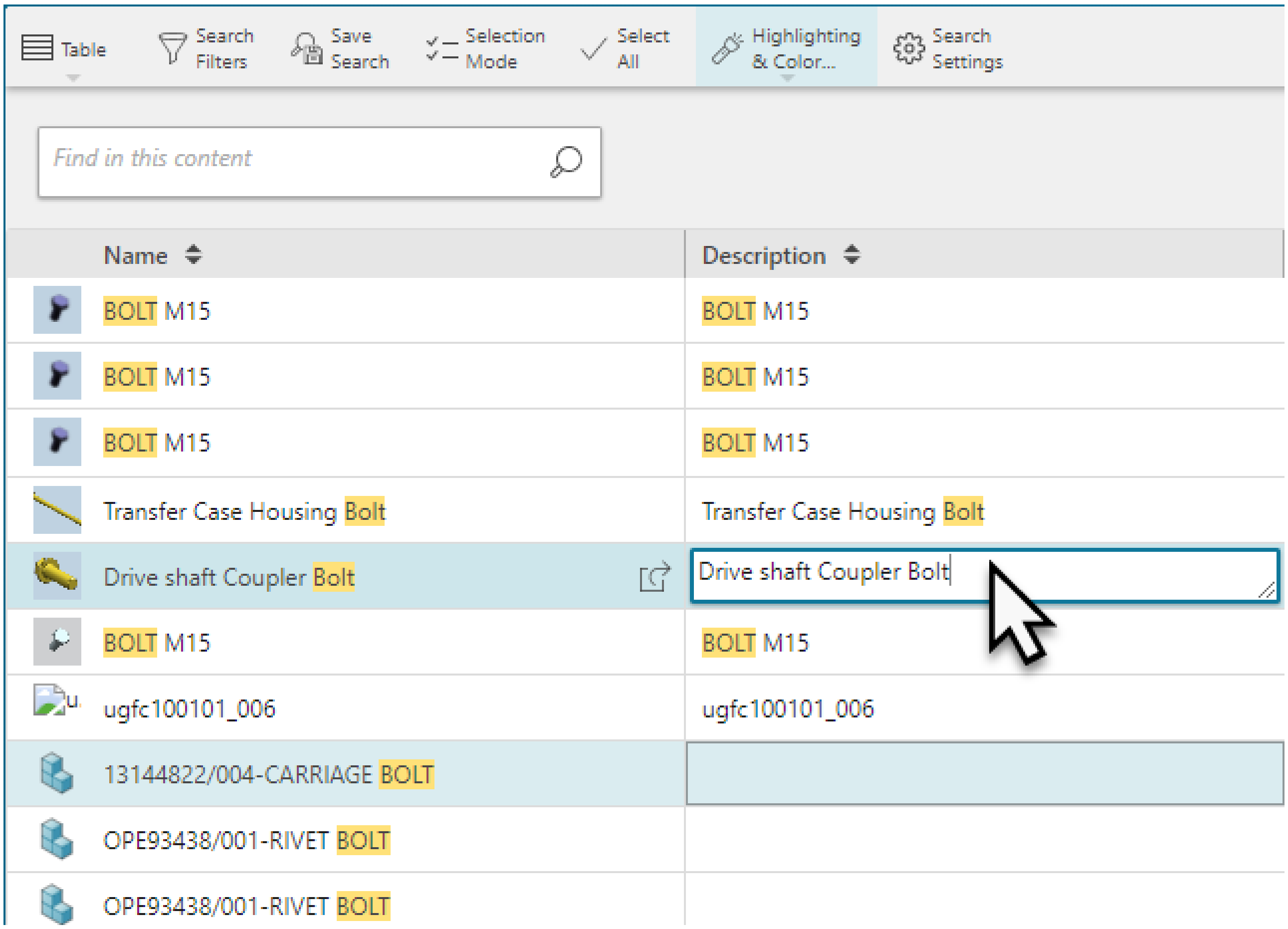
The first time you press the **Tab** key when using keyboard navigation in Active Workspace, a **Skip to main** option displays in the upper-left corner of the window. While this option is displayed, you can press the **Enter** key to bypass navigation to other areas and skip directly to the main work area.



Once in the main work area, you can continue to use the **Tab** and arrows 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*.

7. 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 learnings. 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.

Train the Assistant

Use the **Tutor Mode** to train the Assistant to learn a preferred way to complete a task. To do this:

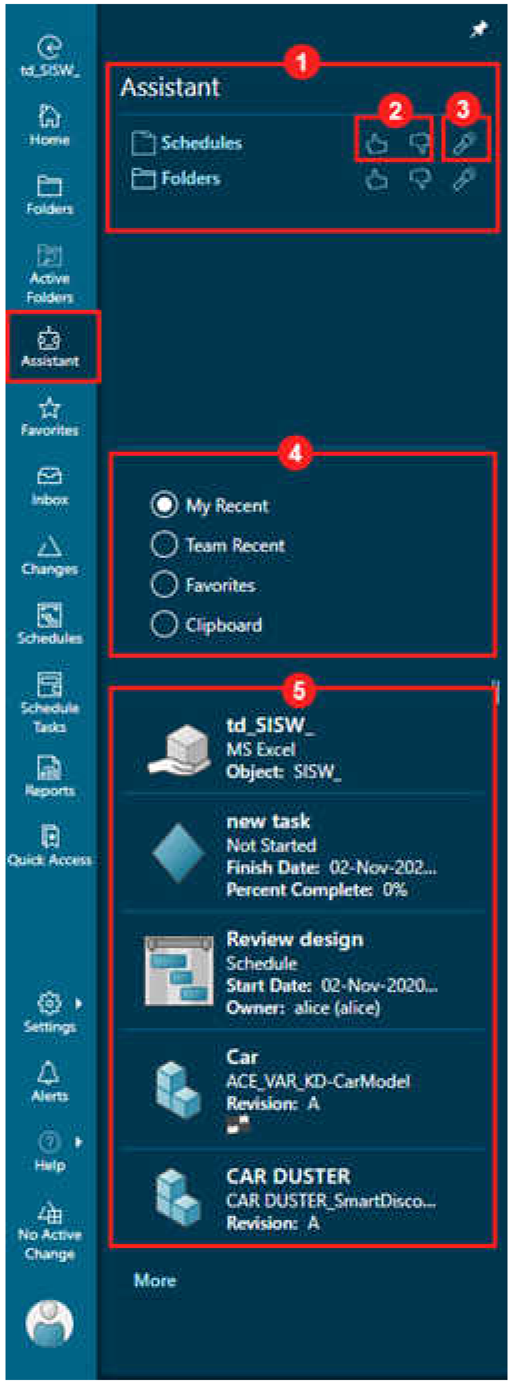
1. Log on to Active Workspace using the credentials of a user profile that is specifically set up for training the Assistant.
2. In the global navigation area, click **Assistant**.
3. Click to pin the **Assistant** panel.
4. Turn on the **Tutor Mode** and start performing the steps required to complete 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.

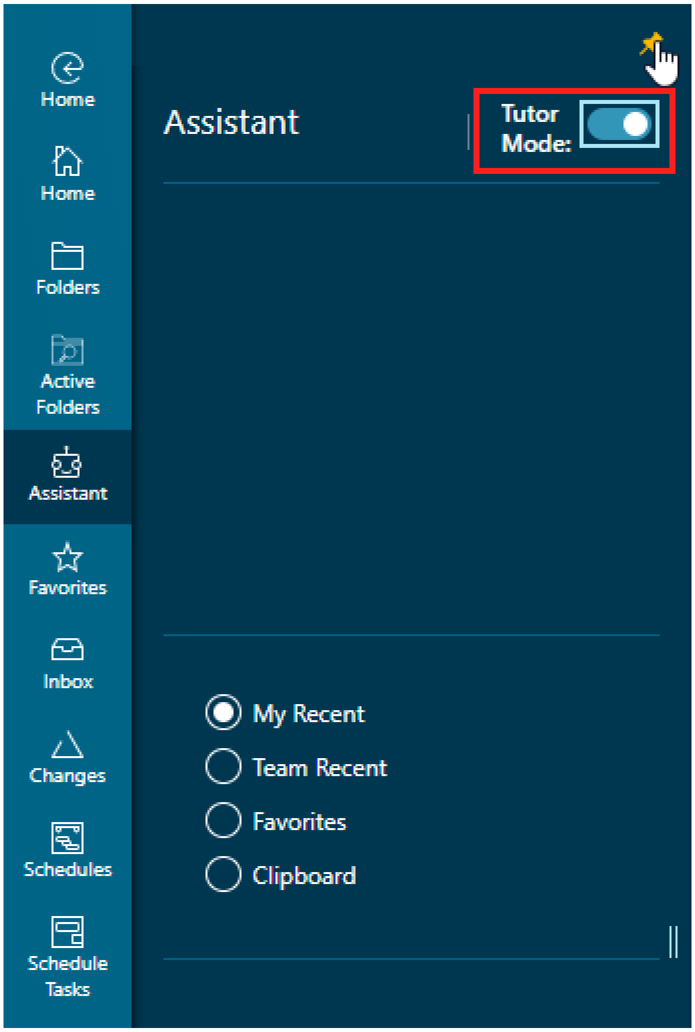


1	View up to 10 commands suggested by the **Assistant** panel. These command suggestions are specific to a user. If the current user is logging on for the first time, the system

	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.


Home
Home
Folders
Active Folders
Assistant
Favorites
Inbox
Changes
Schedules
Schedule Tasks
Assistant
Tutor Mode:
My Recent
Team Recent
Favorites
Clipboard

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