

MatrixOne

Matrix Navigator

Chennai

Agenda

Introduction

Creating and working with objects

Finding Objects

Working with Sets

Using Visual Manager and View Manger

Working with Connections

Checking Files in and out

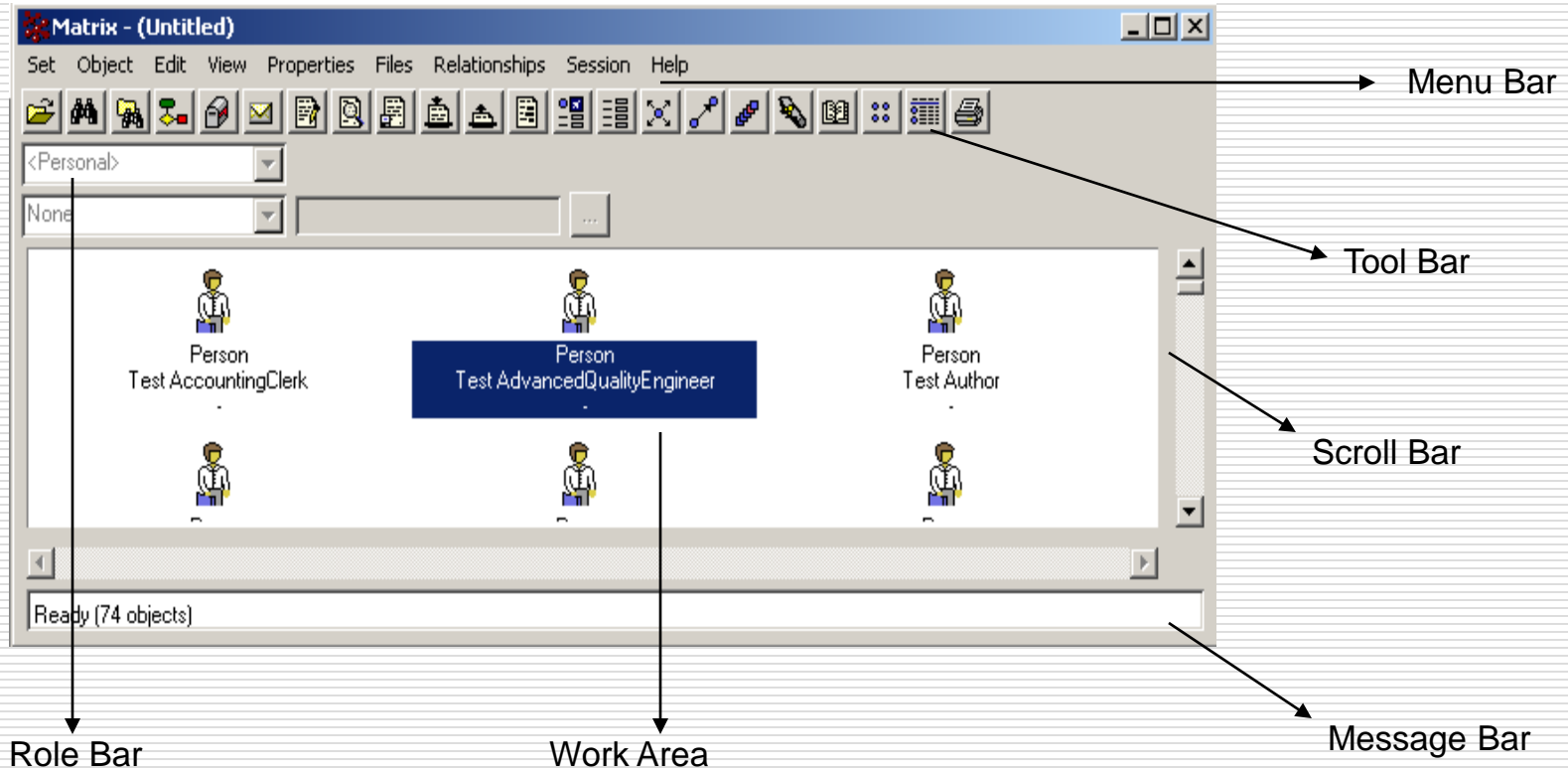
Using Object Life Cycle

Using Icon Mail

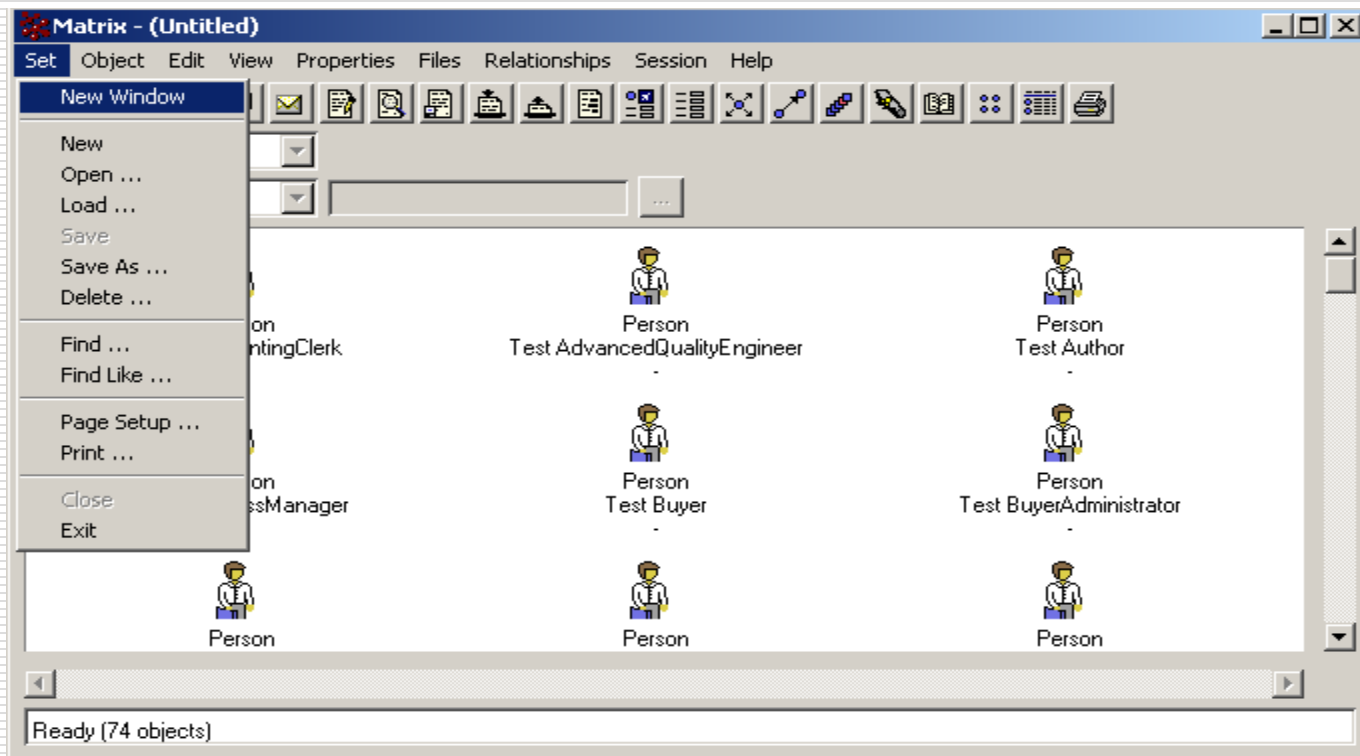
Working with Workflow and generating Reports

- When you start an Matrix session, you must set the context, which identifies you to Matrix.
- To Set the Context
 - Enter the User Name in the User box
 - Enter a Password in the Password box
 - Enter a vault name in the vault box
 - Click Ok to set the context

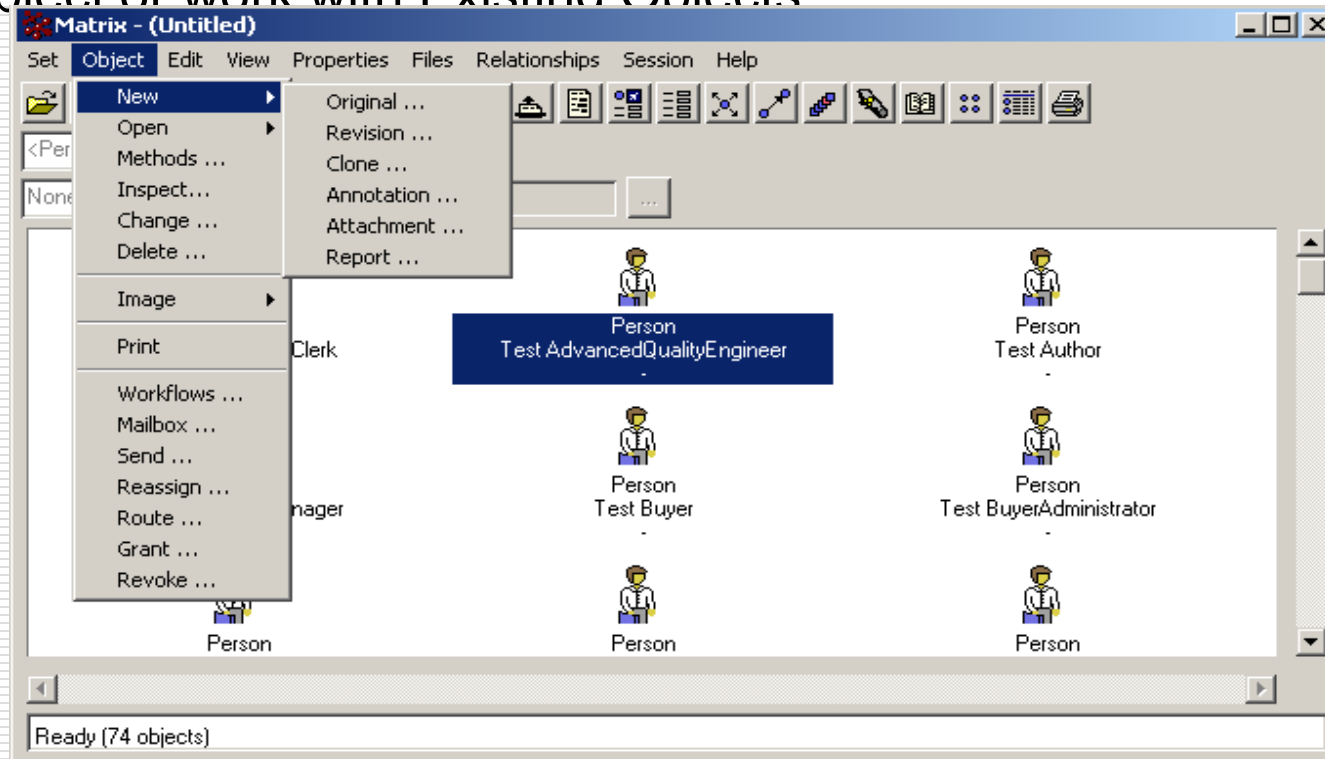
Using Matrix Interface



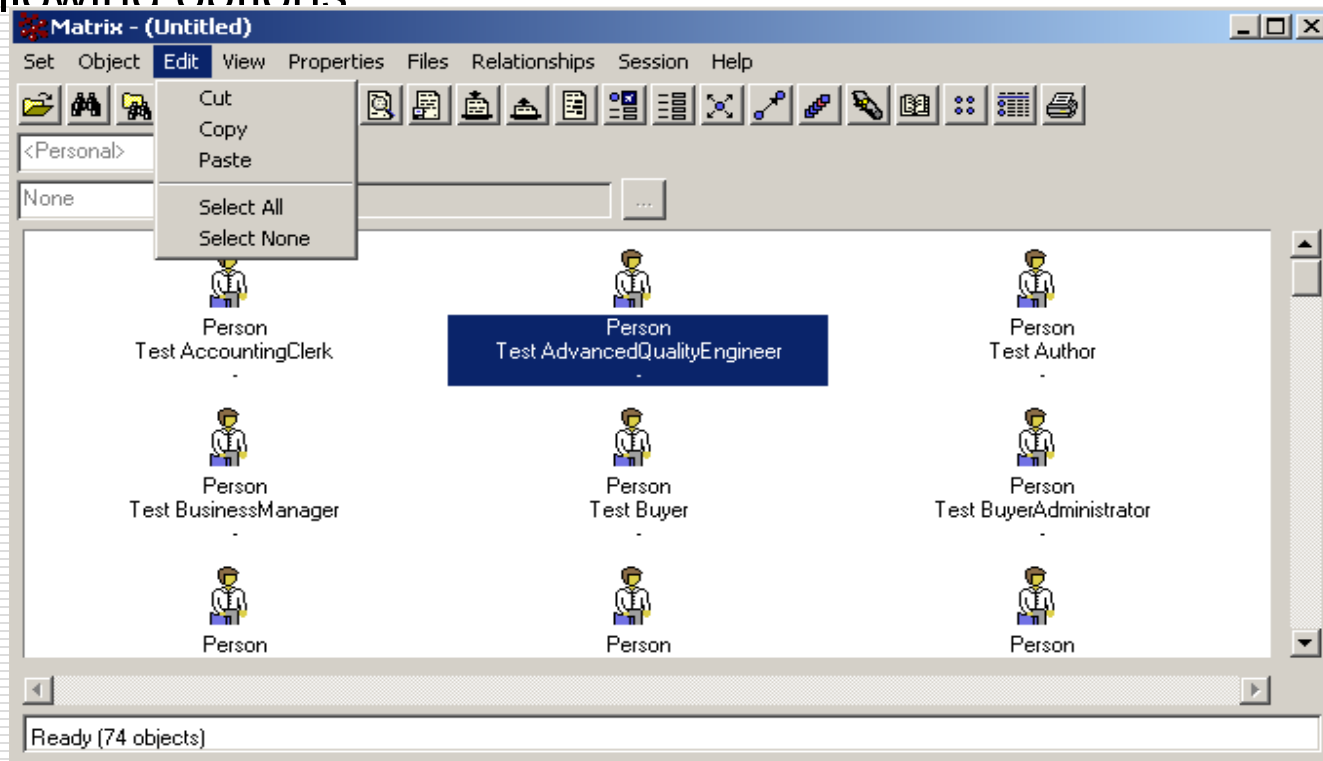
- The Set menu offers the following options to open sets and find objects, close the current Matrix browser, and exit Matrix.



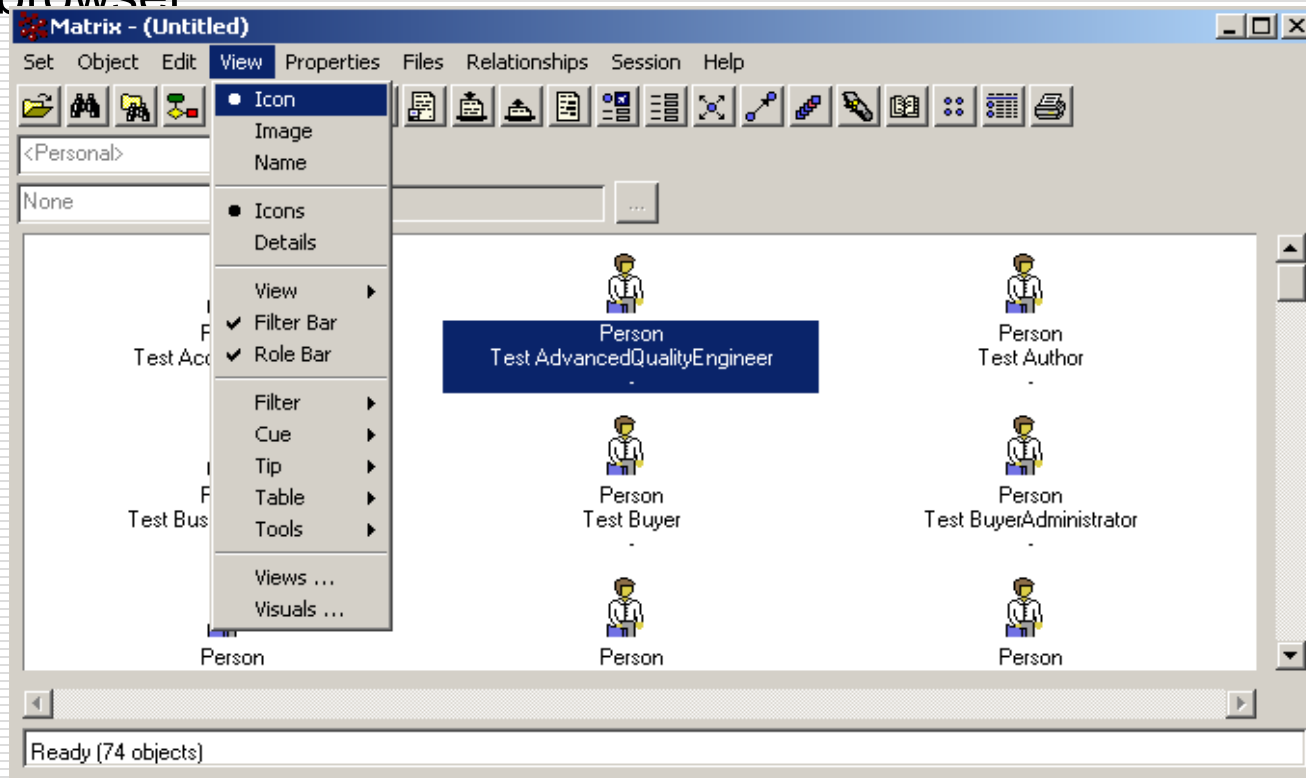
- The Object menu offers the following options to create a new Object or work with Existing Objects



- Edit Menu enables you to select and manage objects using the following options

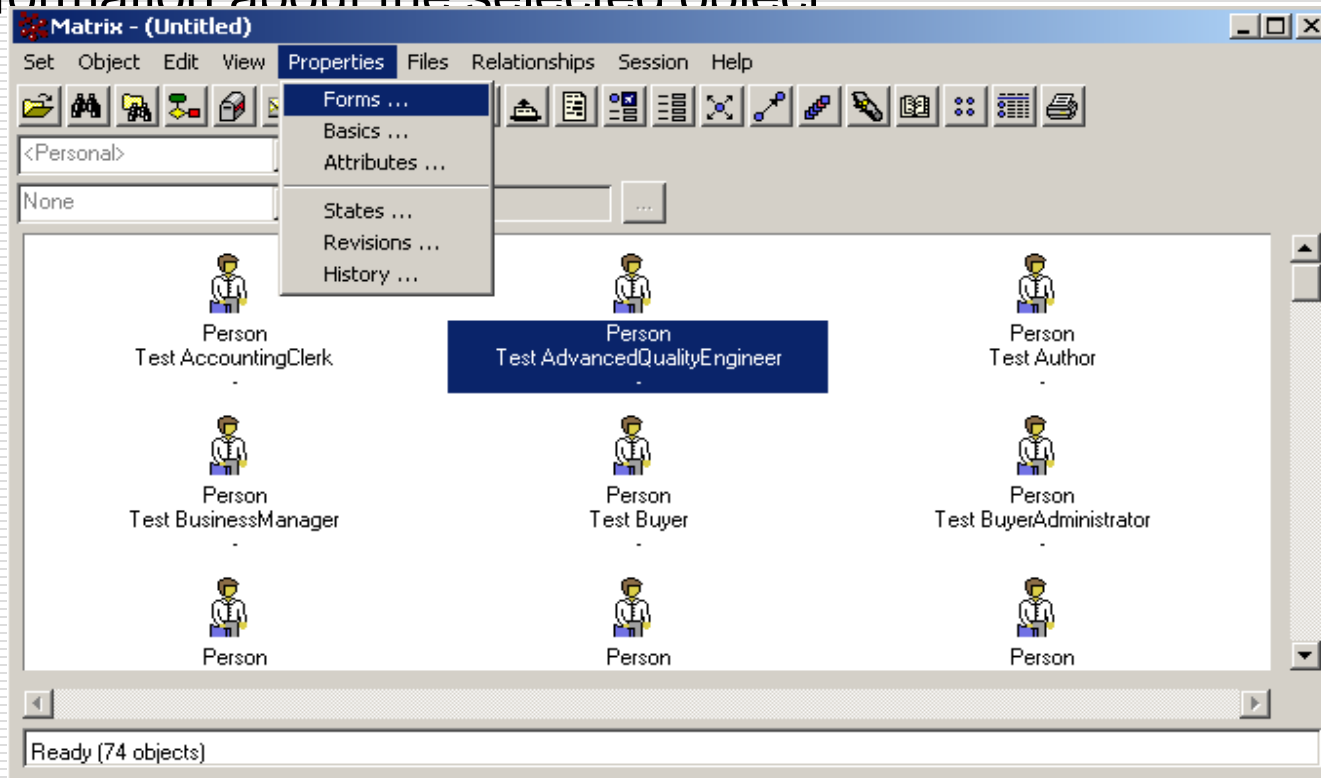


- The View menu provides options for how objects are displayed in a browser

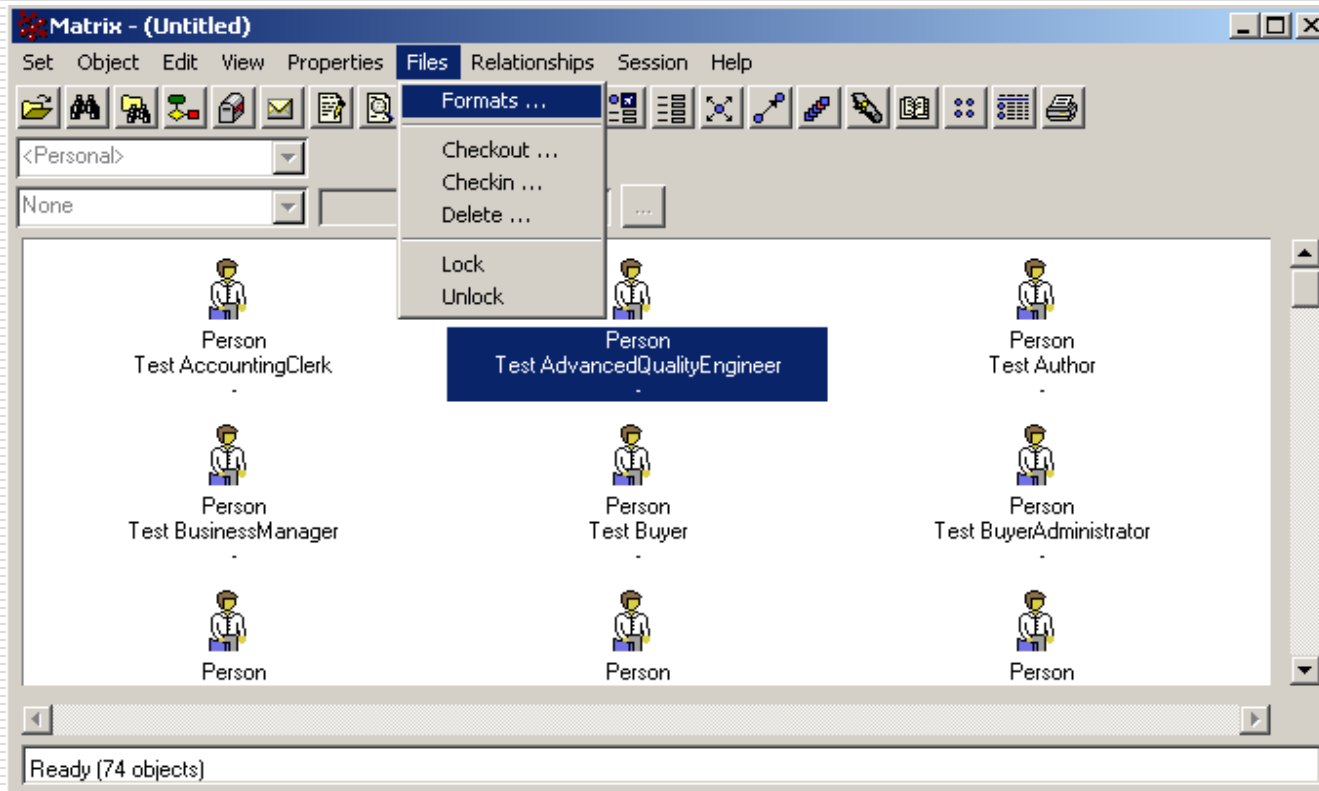


Properties Menu

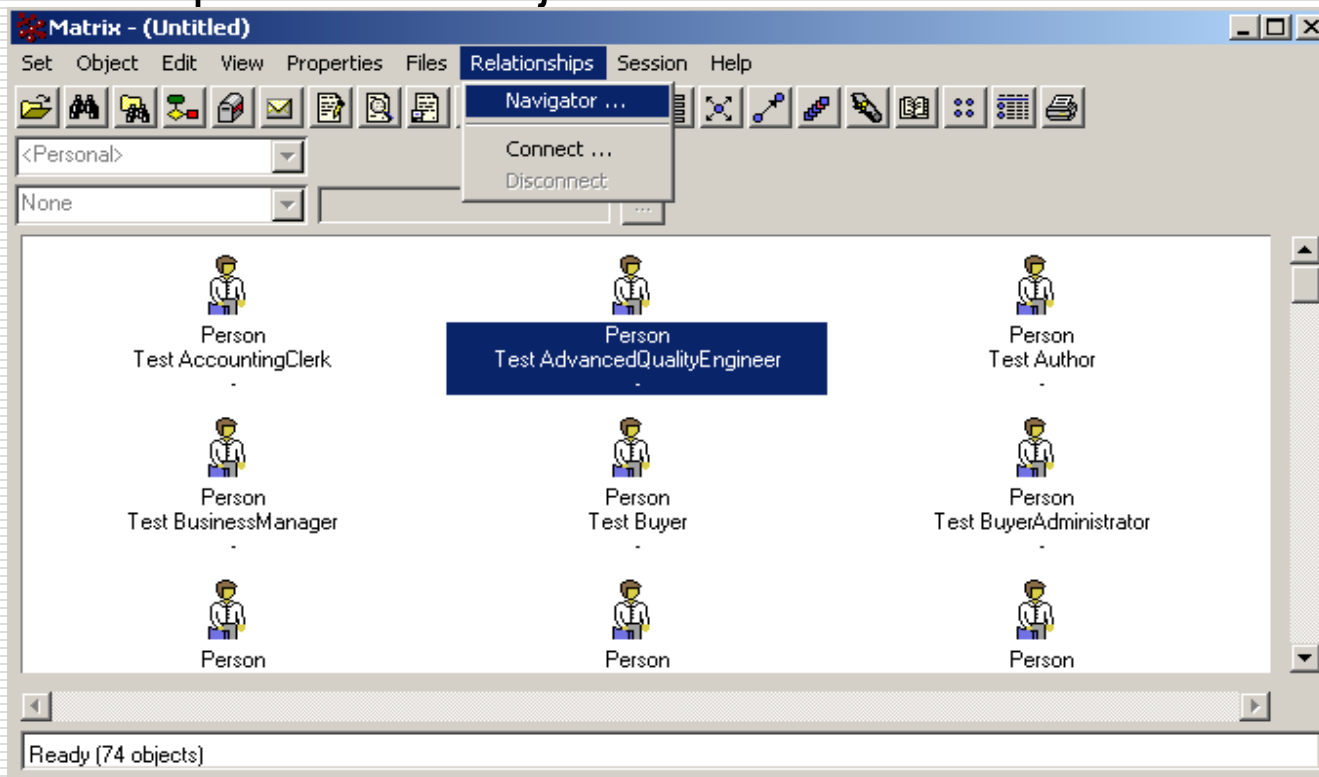
- The Properties menu contains options that allows you to see information about the selected object



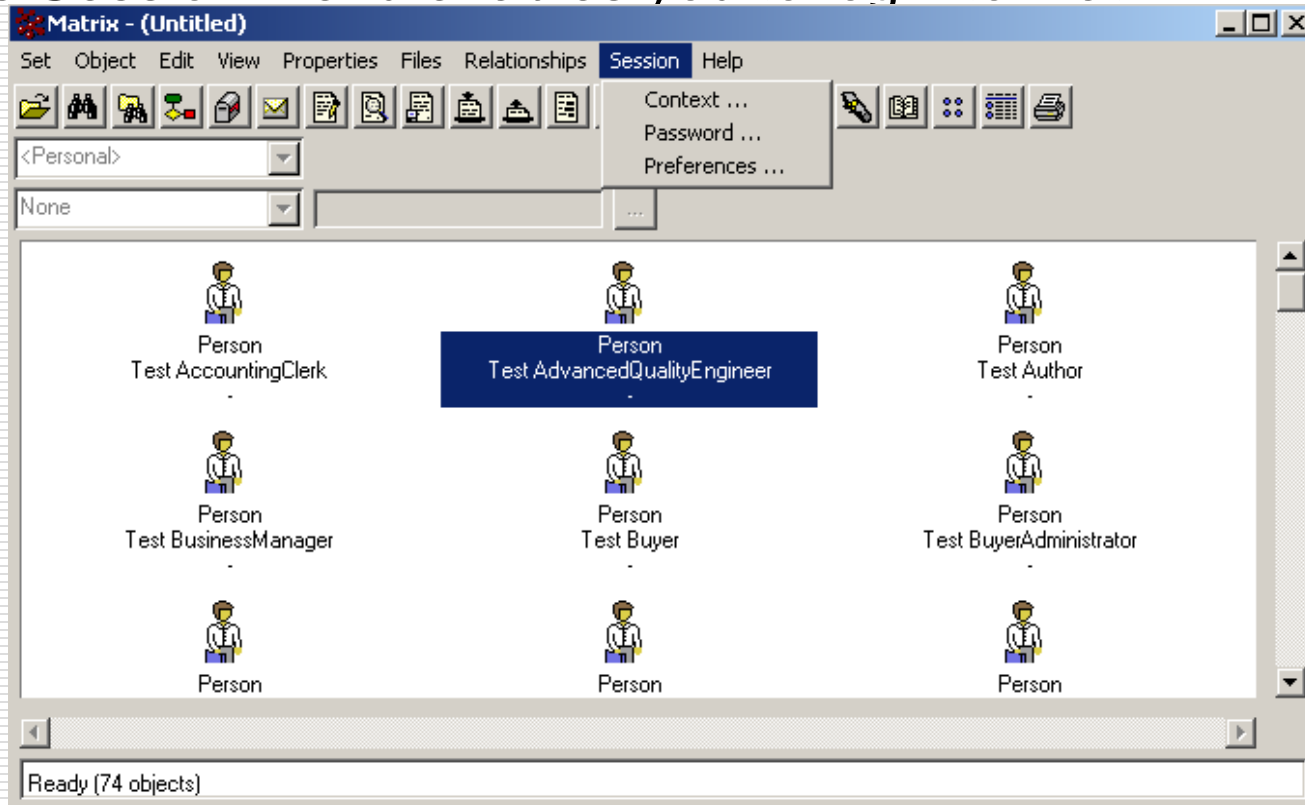
- The File menu lets you manage files



- The Relationship menu lets you display and manage relationships between objects.



- The Session menu enables you to log into Matrix



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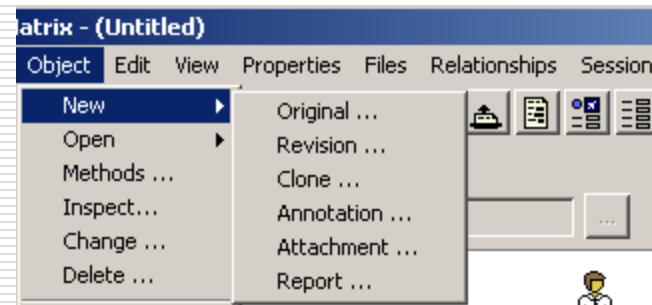
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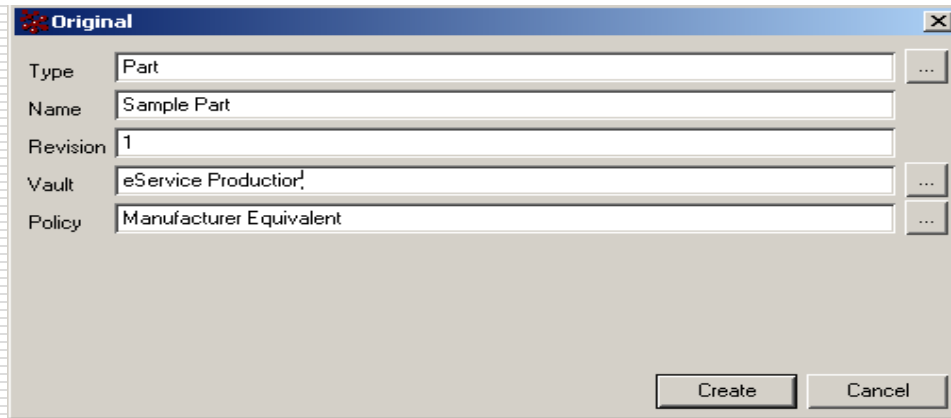
Using Icon Mail

Working with Workflow and generating Reports

- There are three ways to create a new object.
 - You can create a:
 - New object by specifying original information.
 - Revision of an existing object Each revision is a distinct business object.
 - Clone using the basic information of an existing object to create the new object.



- There are two basic steps involved in creating a new object, regardless of whether it is an original, a clone, or a revision:
 - Define the object by assigning it a type, name, revision, vault, and policy.
 - Assign attributes for the object.



Type	Part	...
Name	Sample Part	
Revision	1	
Vault	eService Production	...
Policy	Manufacturer Equivalent	...

Create Cancel

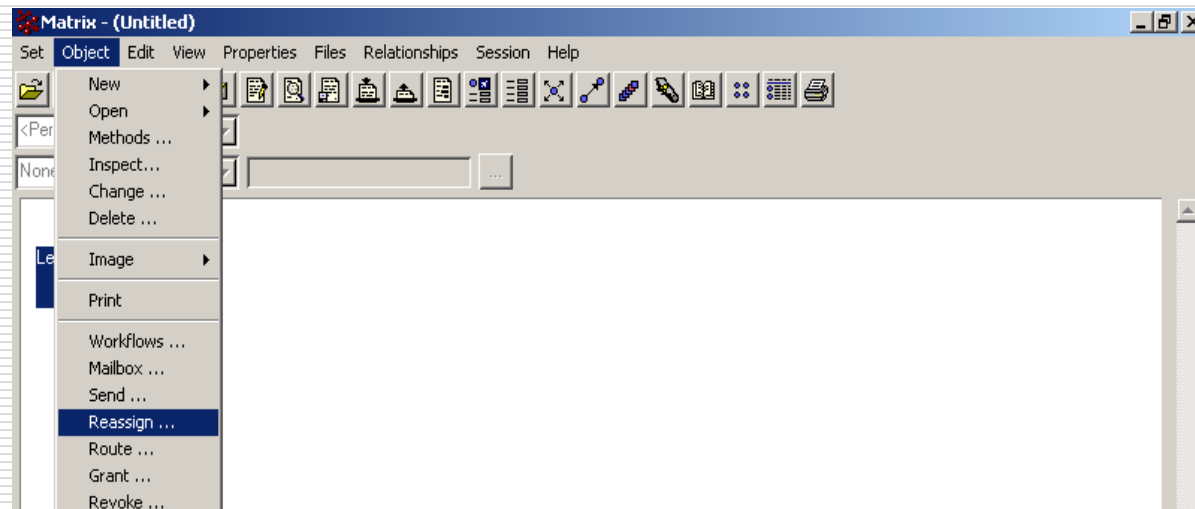
■ Cloning an Object

Cloning is convenient when you want to change an object but also retain the original.

■ Creating a Revision

When an object is revised, the type and name of the original object is used with a new revision identifier.

- Changing Ownership for an Object
 - Ownership for an objects can be changed in two ways.
 - Reassigning an Object
 - Routing an Object.



- Delegating Access to an Object
 - Granting Access :Any person can grant their accesses on an object to any other person or group as long as the person has “grant” access.
 - Revoking Granted Privileges: The grantor and users that do have grant access may revoke the granted privileges by “revoking” access to the object.

■ Deleting an Object:

You can delete one or more selected objects from the database, if you have the appropriate access privilege.

Before Matrix removes objects from the database, they are first disconnected from any related objects

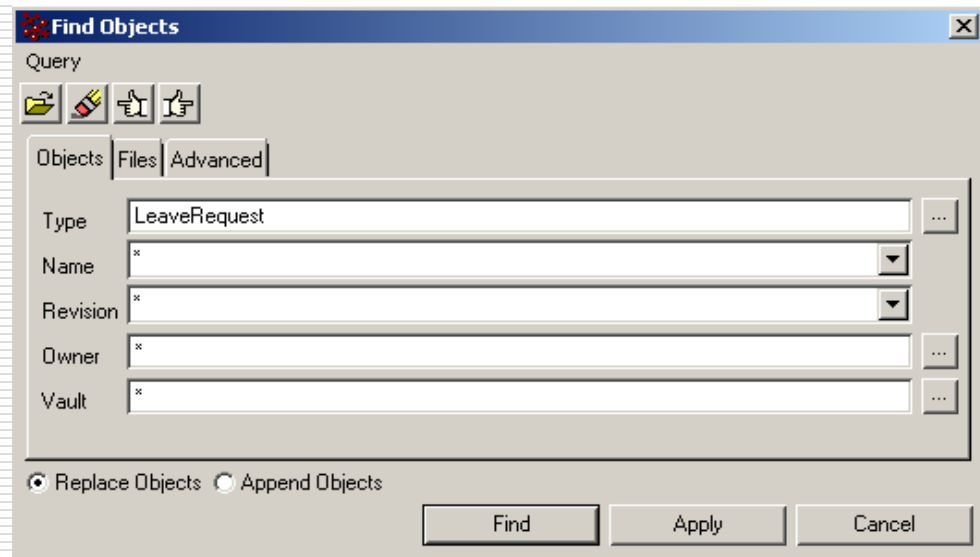


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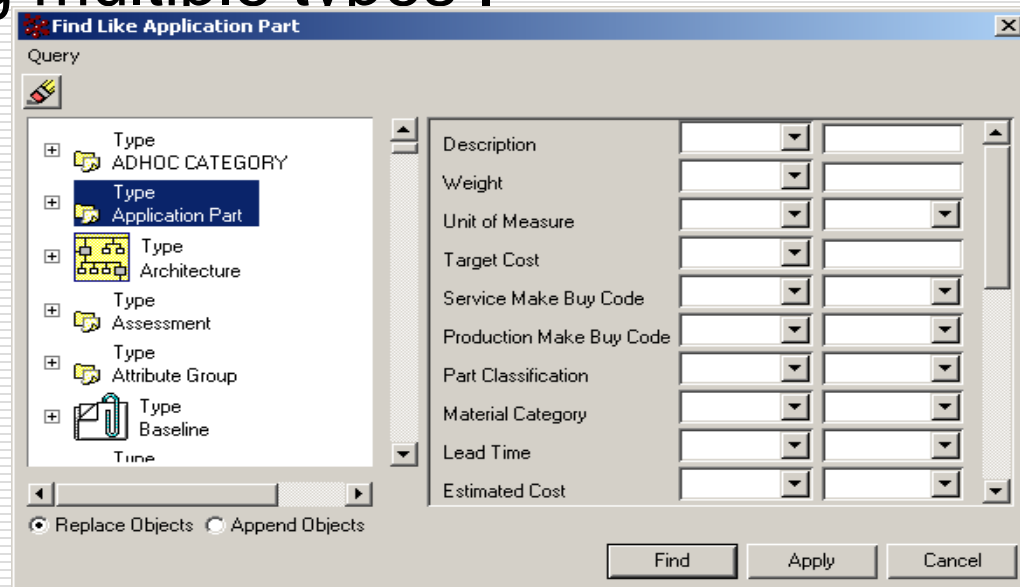
■ Overview

- You can find objects and place them in a browser work area in several ways:
- You can search for objects that meet your search criteria.



- Searching for Objects
 - You can perform a simple search to find objects with a specific type, name, revision, owner, or vault.
 - You can further refine your search by specifying Where clauses on the Advanced tab.
 - In addition, you can use the Files tab to find objects that contain files that include a text string.

- Selecting Objects Using Find Like
- Find Like is a specialized find, which is useful for finding multiple types .



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■ Overview

Objects in Matrix can be connected via a relationship. Connections in Matrix are themselves objects.

■ Connections between objects can be made in three ways:

- **Manually**—You can create a relationship between a selected object and any number of other objects.
- **Drop Connect**—You can create a connection between objects by dragging them from any kind of browser and dropping them onto any object in a Navigator browser
- **Automatically**—A relationship may be defined automatically if you annotate or attach information to an object.

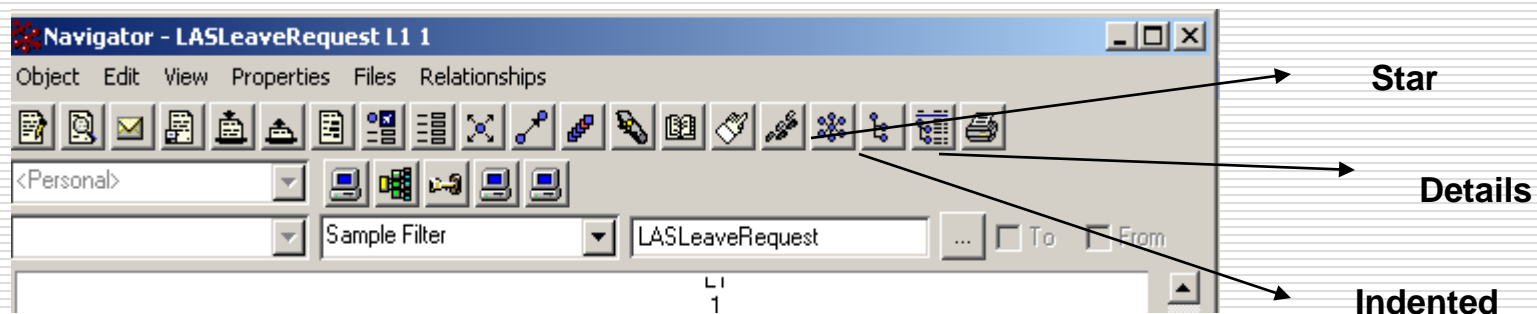
■ Connecting Objects

The Connect option creates a relationship between selected objects.

- The basic procedure involves three steps:
 - Selecting the objects to be connected.
 - Specifying the relationship and making the connection.
 - Assigning values to the attributes of the connection, if any.

Working with Connections

- Using the Navigator Browser
 - Three modes of Navigator Browser are
 - **Star mode** : Objects connected to the selected object are displayed in a circular pattern around the object.
 - **Indented** : Objects connected to the selected object are displayed below it.
 - **Details** : An indented table is displayed.



■ Freezing Relationships

Connections may be frozen, or locked, so they cannot be disconnected (unless first thawed).

■ Thawing Relationships

In order to allow modifications or disconnections of a frozen relationship, it must be thawed by someone with thaw access on the objects on both ends of the connection.

■ Disconnecting Objects

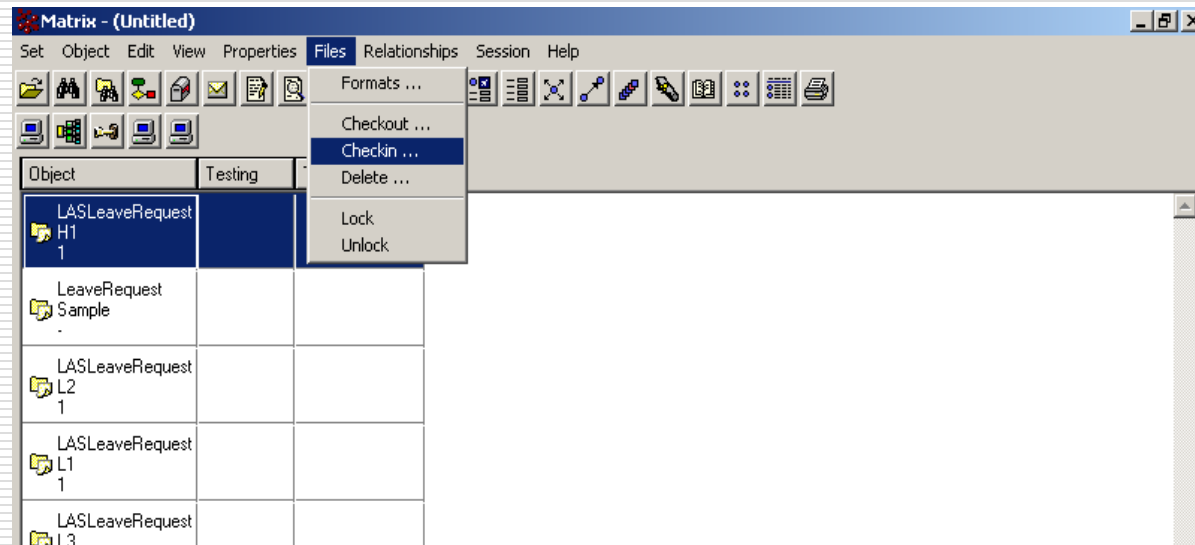
You can disconnect objects while in the Star or Indented browser mode. When you disconnect objects, the selected relationship between the objects is removed.

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■ Checking Files Into an Object

- Files must be checked into an object before they can be viewed, edited, or checked out.
- You specify the file format when checking it in so that Matrix can launch the application software and open the file.



■ Checking Out a File

- Checking a file out makes a copy of it to a directory of your choice. Usually Users lock files at checkout so that multiple people are not changing it simultaneously.
- While a file is locked, Users still have View access. If you lock a file when you check it out, unlock it when you check it in again.

■ Deleting a File

- An Object may contain multiple files. Just as files may be checked into an Object individually, they may be deleted individually.

■ Locking and Unlocking an Object

When an object is locked, no files can be checked into the object until the lock is released.

■ Locking an Object

You must have lock access to lock an object.

■ Unlocking an Object

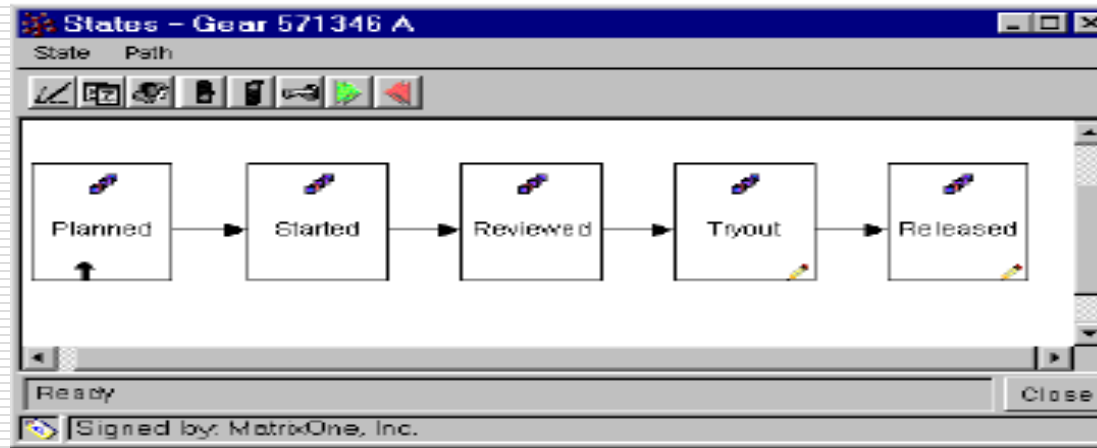
If you are not the user who locked the object, you may unlock it if you have unlock access on the object.

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■ Overview

- Each object has a lifecycle—a series of states through which it passes during its existence. The window in which a lifecycle is displayed is called a States browser.



- State Branching and Signatures
 - A signature specifies who can control the promotion or rejection of a business object.
 - A branch defines what the next state will be after a signature is applied.
 - For each state, it is possible to have more than one branch. Which branch is taken depends on which Signature is satisfied.

■ Promoting an Object

- When the criteria defined for meeting any given state are met, as defined in the policy, promotion to the next state in the lifecycle should occur.
- An object is promoted automatically when all requirements are met and the Auto Promote feature is enabled in the policy.
- Otherwise, you can manually promote an object.

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- Sending and Receiving Information
 - Information is distributed across Matrix in two basic ways:
 - Manually.
 - Automatically—Mail can be sent and received automatically based on an object's lifecycle states, or via a trigger, wizard, or method.

■ Sending Mail Manually

- When you send mail manually, you must select the objects, open the Send window, define the distribution list, and enter the message.

■ Receiving Icon Mail

- Matrix periodically checks for the arrival of new mail for the current user context. When new mail is detected, the Icon Mail button in the main browser switches from an empty mailbox to a mailbox with letters.

- **Replying to a Message**

You can reply to the author of an Icon Mail message from the Icon Mail-inbox.

- **Forwarding a Message**

You can forward an Icon Mail message you received to other Matrix users

- **Deleting a Message**

You can delete Icon Mail from the Icon Mail-inbox.

Questions



Thank You !!!

Chennai