Workspaces

Release 15.2.1.7

CONTACT Software

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Contents

Introduction

CONTACT Workspaces is the solution for CAD and multi-CAD data management and collaboration. *CONTACT Workspaces* ensures the near-real-time availability of CAD data in a company's PLM and ERP backbone. It permits the faster, synchronized cooperation of self-organized development teams. *CONTACT Workspaces* also provides outstanding functions for cross-enterprise collaboration with partners and suppliers.

CONTACT Workspaces, in combination with *Workspace Manager*, is designed as a tool for CAD data management and collaborative product development.

A workspace is a working context used to organize files, documents, CAD models, master data, BOMs, etc. Typically, a workspace represents and structures the often complex product data from construction spaces, large CAD assemblies and Office documents and creates an overview in this way.

The application *Workspace Manager* is used for editing and synchronization between various users.

You can assign a project or a part to a workspace. Like documents, a workspace can contain files and be located in a status or index revision. Furthermore, a workspace can contain directories and reference any documents, which can, in turn, possess separate document references.

Explanations for files and documents are located in the user manual for *Documents*, or for CAD documents in the user manual for *Product data*. Manuals for *Workspace Manager* are made available along with the application.

Menu access

You can reach the overview of the available workspaces via the menu item *Products –> Workspaces* in the navigation tree. You can also carry out a search or configure a sorting using this menu item.

Master data

In the standard version, workspaces are described using the following attributes, which are shown in the data sheet and the table listing the actions.

- *No./Index* The workspace no. and the corresponding index uniquely identify the workspace. The no. and index are issued automatically when creating a new workspace. The workspace no. and index cannot be changed for an existing entry.

- *Title* The title describing the workspace. This text is entered as free text.

- *Part No. / Index* Reference to a part master record. The fields are filled using a list of options.

- *Project No.* Reference to a project. The field is filled using a list of options.

- *Description* Description of the workspace that can be entered as free text.

Information on available tabs, e.g. *Files*, can be found in the user manual for *Documents*.

Status network

A workspace can take on various statuses. The status indicates the current processing status of the workspace. Moreover, for each status, you can specify which subsequent status can be selected.

The following statuses are defined in the standard version:

Draft A workspace has this status if it is being processed.

Released A change can no longer be carried out to an approved version. Changes must be carried out to a new version.

Revision You can set an initially approved workspace to the status *Revision* to make revisions to it.

Blocked A workspace can be transferred to the status *Blocked*. The status can no longer be changed after this.

Obsolete A workspace can be transferred to the status *Obsolete*. The status can no longer be changed after this.

Status transitions

The graphic below shows all the statuses defined in the standard version as well as each of the status transitions specified by the system.
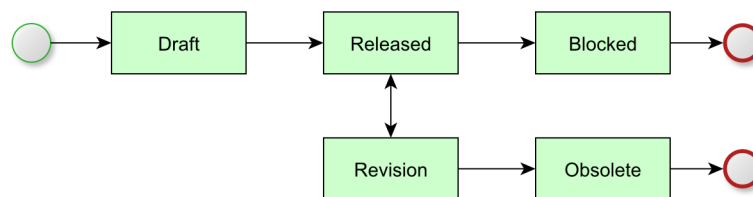
Fig. 4.1: Status network of a workspace

Operations

Once you have received a hit list from a search, you can edit the workspaces in the hit list via their pop-up menu. Select an entry in the hit list and open the corresponding pop-up menu by pressing the right mouse button.

The pop-up menu contains both general functions like *Modify...* and *Search...* explained in the *CIM DATABASE Client Reference* and special document functions that apply equally for workspaces. The latter are described in the user manual for *Documents*, e.g. the function *Create index*.

You can open a workspace for editing in *Workspace Manager* using the function *Edit*. The *Workspace Manager* application must be installed on the workstation computer to do so.

How to edit a workspace

1. Highlight the workspace you would like to edit in the hit list.

2. Open the pop-up menu and select the *Edit* menu item or double-click the entry.

3. After calling up the function, the selected workspace is opened in *Workspace Manager* for editing. Typically, the application appears in the foreground and a dialog is displayed with options for loading the workspace.

The application *Workspace Manager* is started automatically. If it was started already, a new window is opened where appropriate. Once a workspace is opened for the first time for editing, all referenced documents including files are transferred to the local workstation computer. If a workspace already exists locally, you are advised to open it. If present, you should update workspaces existing locally using *Workspace Manager* to guarantee the editing of current data. For information on updating local workspaces and more detailed information, refer to the manuals for *Workspace Manager* made available along with the application.

Relationships

A workspace can be related to other objects such as files, documents, a project or a part. Typically, a workspace references multiple (CAD) documents, which can, in turn, possess document references. Document references are edited in the application *Workspace Manager*. You can change other relationships, e.g. for a project, in the PDM system.

The graphic below shows with which objects a workspace can be correlated in the standard version, and how this is done.
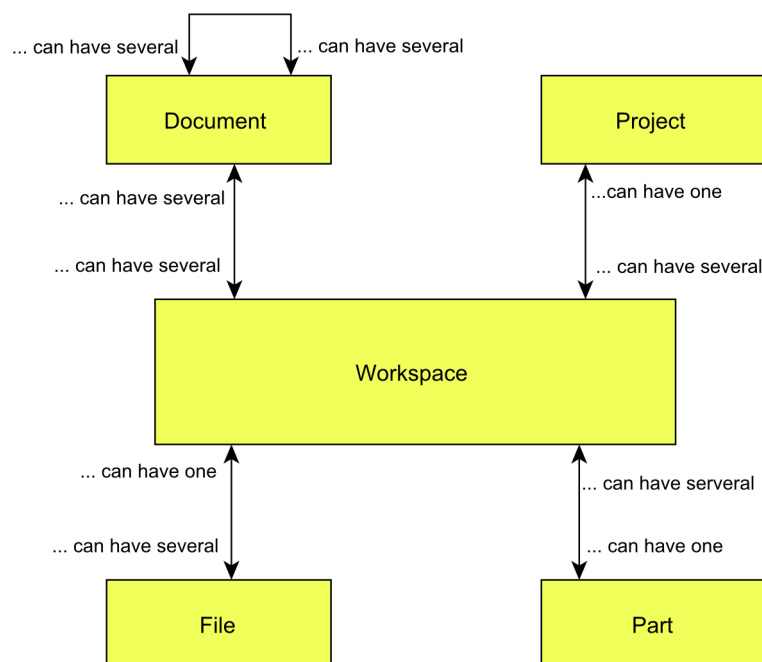
Fig. 6.1: Relationships of a workspace

The network of relationships can be differentiated into two relationship types. There are relationships in which a workspace can be optionally assigned to exactly one object of a type (e.g. a project) (represented by "0..1"), or relationships, in which objects can be optionally assigned to multiple workspaces (represented by "0..*"). The relationships shown in the graphic are described individually below.

- *File* Like documents, a workspace can contain multiple files. This also includes automatically generated secondary formats or system files generated from (CAD) integrations (see user manual for *Documents*).

- *Document* A workspace can reference multiple documents. Document references are generated using the application *Workspace Manager*.

- *Project* You can optionally assign a workspace to exactly one project. A catalog selection in the master data sheet (see *Master data* (page 3)) is used to make the assignment.

- *Part* You can optionally assign a workspace to exactly one part. A catalog selection in the master data sheet (see *Master data* (page 3)) is used to make the assignment.

Open CAD documents in CONTACT Elements

Starting with *Workspace Manager* 3.2, you have the option to open CAD documents from CONTACT Elements hit lists in the CAD system in one step.

7.1 Configuration

The corresponding operation is called "Open in CAD system" and has the internal description "cdb_cad_wsm_edit". It is assigned to the class "model". The operation is not enabled by default.

To use the operation, you can activate it in general (as described in the CIM Elements administration manual) or you can configure the "CDB Edit" for the desired file type so that it calls up the new operation "cdb_cad_wsm_edit". This process is described in the "CDB_Edit section (Editing files)" of the CONTACT Elements administration manual.

You may want to have the operation called up by double-clicking CAD documents. You can configure this by selecting the class "model" as the *Default Action*.

This exact behavior can be adjusted for *Workspace Manager* pages (see *Workspace Manager* administrator manual).

7.2 Functionality

The assembly in question is checked out in the currently opened workspace for preparation.

If the assembly is already included in the workspace, a check is first carried out of whether the assembly file exists in the same version locally. If this is not the case, the user can make a decision and update or overwrite the assembly, if necessary, or undo the local changes.