



ENOVIA SMARTTEAM

**SMARTTEAM – COMMUNITY WORKSPACE
ADMINISTRATION GUIDE**

Important Notice

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ABOUT THIS GUIDE

This Guide provides all information necessary for **SmarTeam® - Community Workspace System Administrators** to configure **SmarTeam® - Community Workspace** with the minimum of effort.

The administrators and users will discover that **SmarTeam® - Community Workspace** installation is as quick and easy a process as using the software.

This Guide is divided into the following sections:

Introduction: A Quick Start to SmarTeam – Community Workspace

This section introduces the user to SmarTeam – Community Workspace basics and is aimed at getting you started quickly to enable and perform data collaboration over the Internet.

Appendix A: Troubleshooting for the SmarTeam – Community Workspace Administrator

This section is aimed at the SmarTeam – Community Workspace Administrator, helping you solve potential problems that you may encounter after installing SmarTeam – Community Workspace.

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INTRODUCTION: ADMINISTRATION QUICK START

This section describes how to get started quickly with SmarTeam – Community Workspace after installation on the assigned server and is intended for the following type of SmarTeam – Community Workspace member:

- The SmarTeam – Community Workspace **System Owner** who has just installed SmarTeam – Community Workspace and updated the **SmarTeam** database via the SmarTeam – Community Workspace **Data Model Wizard**.
- The SmarTeam – Community Workspace member assigned one (or more) of the following permissions:
 - ❑ System Owner
 - ❑ Create communities
 - ❑ Manage permissions and members
 - ❑ Create folders
- The SmarTeam – Community Workspace member assigned permissions to manage data.
- This section does not aim to describe all functions, either partial or full, that are available in SmarTeam – Community Workspace, but to provide the following:
- Instructions for the SmarTeam – Community Workspace **Owner** to set up the system and make it available as quickly as possible for data collaboration over the Internet.
- Instructions for members assigned correct permissions to set up a community, add members and grant permissions to other members
- Instructions for members assigned correct permissions to create folders, add members and grant permissions to other members.
- Instructions for members assigned correct permissions to manage data for collaboration over the Internet.
- Complete and detailed information when working with SmarTeam – Community Workspace is available for all members via SmarTeam – Community Workspace online Help.

Getting Help

Any time after logging in to SmarTeam – Community Workspace, click on the **Help**  button in the SmarTeam – Community Workspace toolbar to view detailed online help for the current page, or to access the main Help file.

An Introduction to Setting Up SmarTeam – Community Workspace

If you are the **SmarTeam System Administrator** who updated the **SmarTeam** database via the SmarTeam – Community Workspace **Data Model Wizard**, as described in **Section II**, then you

automatically retain the highest privileges available in SmarTeam – Community Workspace – the **System Owner**.

It is your responsibility to set up this new SmarTeam – Community Workspace system by performing the following tasks to get your SmarTeam – Community Workspace system “up and running”. In addition, you can also transfer this responsibility to another member by granting **Owner** permission to the selected member.

- Define settings for SmarTeam – Community Workspace
- Add/assign members to SmarTeam – Community Workspace
- Assign permissions to members, where applicable, such as:
- **Owner** - assign other members as **System Owner**, **Community Owner** or **Folder Owner**.
- **Manage permissions and members** - permit other members to grant permissions to members and manage members.
- **Create Communities** - permit other members to create communities. (A member assigned permission to create communities is defined as a **Community Owner**.)

SmarTeam – Community Workspace Administration Levels, Color Codes and Security

Before setting up your system, you should understand the following points when working with SmarTeam – Community Workspace:

- ❑ Administration levels
- ❑ Color codes used within SmarTeam – Community Workspace
- ❑ Security

Administration Levels

SmarTeam – Community Workspace has three controlled levels of administration that enable authorized members to work quickly and efficiently. Members can then concentrate on their main tasks - managing and securing product data no matter their location in the world at any moment in time.

The three administration levels are:

- ❑ **System Level**
- ❑ **Community Level**
- ❑ **Folder Level**

When SmarTeam – Community Workspace is first installed, the **System Owner** is responsible for assigning members to SmarTeam – Community Workspace and then assigning permissions to members (optional).

Members can then be assigned to communities and to folders within the community by a **Community Owner** and **Folder Owner**, respectively.

Once a member has been assigned to a folder, the **Folder Owner** can grant permissions to a member to manage data objects within the folder.

And this is what it’s all about – the meaning of your SmarTeam – Community Workspace system: Enabling members to ultimately collaborate and manage specific data objects over the Internet!

Each member can be assigned permissions according to his/her needs within a community. Assigning permissions to members at all levels is optional - a member who is not assigned

permissions is able to (only) view folders and data objects within a community of which he/she is a member.

Permissions are assigned to any member, who can be authorized to create communities (projects), folders and ultimately grant their own permissions to other members, depending on their needs.




By granting the correct authorizations and permissions, members are able to manage data added to a SmarTeam – Community Workspace community and collaborate over the Internet in a secure environment.

Color Codes

SmarTeam – Community Workspace uses a color code system for buttons that enable owners and members the ability to quickly identify different functions within SmarTeam – Community Workspace.

Important:

Buttons are only visible and enabled for members with the correct permissions.

	An orange button indicates a system level function.
	A yellow button indicates a community level function.
	A blue button indicates available operations when managing members/groups.

Security Considerations

Before proceeding, you are recommended to consider the following security points:

Buttons that appear on various web pages are not always enabled at all levels and for all members. They are only enabled for members specifically assigned with the correct permissions. It provides total security to access projects and perform tasks within a project.

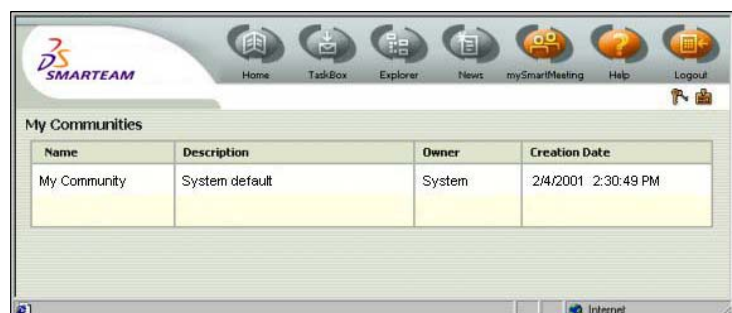
Careful consideration must be given when assigning permissions at all levels. Assigning permissions to a member with the ability to delete or change revisions who may misuse his/her permission rights - can be crucial to a community's success or failure.

- ❑ In addition to the **Community Owner**, a **System Owner** can also control permissions granted within a community (excluding folders, unless assigned by the **Folder Owner**).

Logging In to SmarTeam – Community Workspace

When you log in to SmarTeam – Community Workspace for the first time, the **My Communities** page appears.

When you login SmarTeam – Community Workspace (after installation) as the **System Owner**



(or for any member) only the **Help**  and **Logout**  buttons are enabled in the SmarTeam – Community Workspace toolbar.

Two icons are displayed and enabled in the **My Communities** page:



Administration (system level)



My Details (for the member currently logged in)

When you first log in to SmarTeam – Community Workspace, the **My Communities** list displays a default community provided by the system. This page is the main entry point for all members logging in to SmarTeam – Community Workspace.

As the **System Owner** setting up SmarTeam – Community Workspace for the first time, your first task is to define settings for your SmarTeam – Community Workspace system.

Defining SmarTeam – Community Workspace Settings

Objects added and managed within SmarTeam – Community Workspace are categorized into class types and assigned properties referred to as attributes.

Classes are structured as a tree so that information can easily be inherited, enabling information to be reused, such as attributes, searches, user authorization, etc.

As the **System Owner** setting up SmarTeam – Community Workspace for the first time, you can select from the following settings to change SmarTeam – Community Workspace default system definitions:

Simplified Profile	Displays minimum attributes for each class in an object's Profile Card when a simplified view is selected. You are recommended to use this setting for all leaf classes. This setting also allows you to define attributes as Read Only (RO) or Read/Write (RW) .
Advanced Profile	Displays maximum attributes for or each class in an object's Profile Card when advanced view is selected. You are recommended to use this setting for all leaf classes. This setting also allows you to define attributes as Read Only (RO) or Read/Write (RW) .
Quick search	Displays minimum attributes to select when running a quick search for objects. Enter only text attributes. (Only super class attributes can be selected.)
Advanced search	Displays maximum attributes for each class to select when running an advanced search for objects.
Search Results	Displays search results according to the defined attribute settings. (Only super class attributes are displayed in the search results.)
Tree Attributes	Displays the selected attributes in the community tree browser.
Definitions	
Object	A physical object, such as a (computer) folder, file, screw, bolt, etc.
Attribute	Identifies an object, such as Date Created, Height, Length, etc.
Class	A set of objects that share common structure and common attributes.

Super Class	The top-most class in any class tree.
Sub-class	Inherits the attributes of its parent class; additional attributes specific to the sub-class can be added.
Leaf class	The last class in the class tree structure.



Working with System Settings

SmarTeam – Community Workspace, by default, provides a rich variety of classes for classifying object types and applying attributes:

- Default attributes are defined for each super-class and sub-class.
- Sub-classes by default inherit attributes defined for the super-class, but can be changed.
- Leaf classes automatically inherit attributes defined for a super-class,

Changing Default System Settings

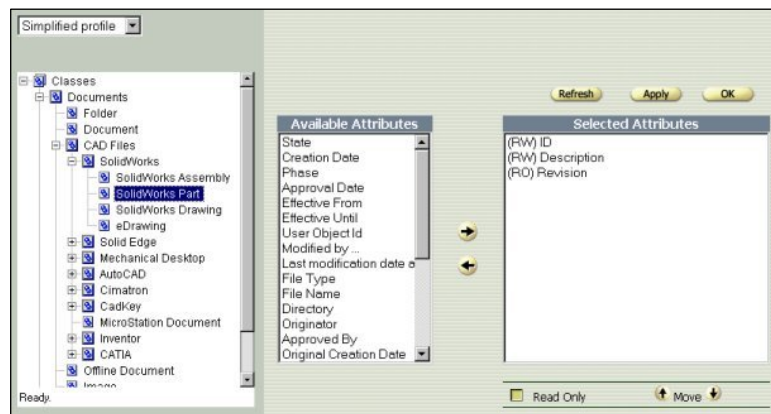
To change SmarTeam – Community Workspace default system settings, proceed as follows:

1. In the **My Communities** page, click on the **Administration**  icon to display the **My Communities** page.
2. In the **My Communities** page, click on the **System Settings**  button to display the **System Settings** page.
3. In the dropdown box, click on the arrow to select the system setting you want to change, as described previously:

Simplified Profile Advanced Profile

Quick search Advanced search

Search Results Tree Attributes



Super-classes for the selected setting are displayed in the left side in the tree browser. Expand a class tree and select the class or sub-class for which you want to define attribute settings. The available attributes and selected default attributes for the class are displayed in the right side in the previous step.

4. In the **Available Attributes** list, select an attribute for this class and click to add the selected attribute to the **Selected Attributes** list. All attributes in the **Selected Attributes** list will be displayed when you next perform the action for the selected setting.

□ Click to remove a selected attribute from the **Selected Attributes** list.

□ By default, as in the **SmarTeam** database, selected attributes are defined as **Read/Write (RW)**, enabling a member to change an attribute's value. To define an attribute as **Read Only (RO)**, select the attribute in the **Selected Attributes** list then click in the **Read Only** check box.

To define a **Read Only** attribute as **Read/Write (RW)**, select the attribute in the **Selected Attributes** list then click in the **Read Only** check box to uncheck it. (Be consistent - if you define an attribute in the **Simplified Profile** as **Read Only (RO)** or **Read/Write (RW)**, define it the same for the **Advanced Profile**, and vice versa.)


- ☐ **(RO)** or **(RW)** appears before each attribute name to indicate its status.

Tip:


Hold the **Shift** button down on your keyboard while selecting adjacent multiple attributes.

Hold the **Ctrl** button down on your keyboard to select multiple non-adjacent attributes.

5. Repeat Steps 3 - 4 above for each system setting that you want to change.
6. After making all changes, proceed as follows:

Click **OK**  to save your changes and return to the **My Communities** page.

Click **Apply**  to save current changes and remain in the page to perform additional tasks.

Click **Refresh**  to refresh the page. (Any changes made since the last save will be disregarded.)

Send URL - Multiple Database

The Send URL by E-mail window, only available to a user with Administration authorization, displays the URL for a user to log in to a selected database that can be forwarded by email.

Select Database

Click on the dropdown arrow and select the database for forwarding the URL.

Send By Mail

Click to display a new email message from your installed email software. The object's URL is automatically entered in the message. If necessary, add additional text to the email message, explaining the attached object and instructions to the recipient(s).

In the email message window, click Send to send the email message containing the URL to the address(es) entered in the Email Recipient field.

Close Click to exit the Send URL window.

Adding Members to the SmarTeam – Community Workspace System

After changing default system settings (if applicable), you can now start adding members and permissions to the SmarTeam – Community Workspace system.


Members are assigned from internal users or new members are added from external users.

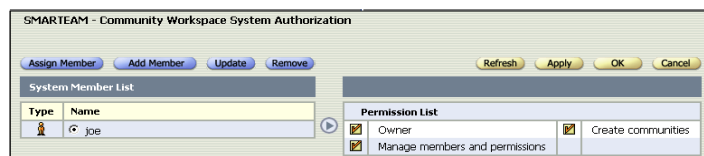
Internal user Any SmarTeam user defined in SmarTeam via the **User Maintenance** utility. Internal users become SmarTeam – Community Workspace users once the SmarTeam – Community Workspace System Administrator imports them from SmarTeam – Editor into SmarTeam – Community Workspace. The permission of internal users are those that are assigned in SmarTeam – Editor intersecting with those that are assigned in SmarTeam – Community Workspace.

External user A user defined in SmarTeam – Community Workspace. Although they have entry access to the SmarTeam database, they have no actual permission within SmarTeam – Editor. Their permissions are restricted to their respective folders and communities, as defined in SmarTeam – Community Workspace.

To add members to your SmarTeam – Community Workspace system, proceed as follows:

1. In the **My Communities** page, click on the

Administration  icon located in the top right corner display the SmarTeam – Community Workspace **System Authorization** page.



to

The SmarTeam – Community Workspace **System Authorization** page displays two separate lists:

- ❑ System Member List
- ❑ Permission List


System Member List

This list displays all members added to your system. Currently, only your name is listed, as shown in the illustration, as you are the **System Owner** who installed the system and other members have not yet been added. (The **blue** buttons function for *this list only*.) Note that as **System Owner**, by default all permissions have already been assigned to your name.


Permission List

This list displays permissions that can be assigned to a system member. (The **yellow** buttons function for *this list only*.)

- A new member can always be added to SmarTeam – Community Workspace without assigning permissions.
- Permissions can be updated at any time by a member assigned with the correct authorization.
- Permissions assigned to a member can always be changed by any member assigned the correct permissions.

2. Click **Add Member**  to add an external member. Proceed to step 3 to continue.

Or

Click **Assign Member**  to assign an internal member (from **SmarTeam**). Proceed to step 4 to continue.



3. When you click **Add Member**, the **Member Card** is displayed.

In the **Member Card** section, enter details in the fields, as applicable. Field names that include an asterisk (*) are mandatory fields that must be completed in order to be able to continue and save the new member in the system.

In the **Permission List** section, select permissions to grant to this member, as described in the following table:



Permission	Meaning...
Owner	Permits the member to enter this system as System Owner - the highest authority. All other permissions are automatically granted
Manage permissions and members	Permits the member to grant permissions to other members and manage members.
Create communities	Permits this member to create communities.

Note: A member with the correct permissions can always assign permissions for a member at a later time.

Click **OK**  to add the new member to SmarTeam – Community Workspace - or click **Cancel**  to abort - and return to the SmarTeam – Community Workspace **System Authorization** page.

When you select **OK**, the new member is added to the **System Members List** with assigned permissions (if applicable).

Repeat this step to add additional external members to SmarTeam – Community Workspace, as necessary.



- ❑ Click **Apply**  to save current changes for permissions assigned to a selected member and remain in the page to perform additional tasks.
- ❑ Click **Refresh**  to refresh the SmarTeam – Community Workspace **System Authorization** page. (Any permission changes for members that have been made since the last save will be disregarded.)


Proceed to Step 5 to continue.

4. When you click **Assign Member**, the **Assign SmarTeam – Community Workspace Members** page is displayed.

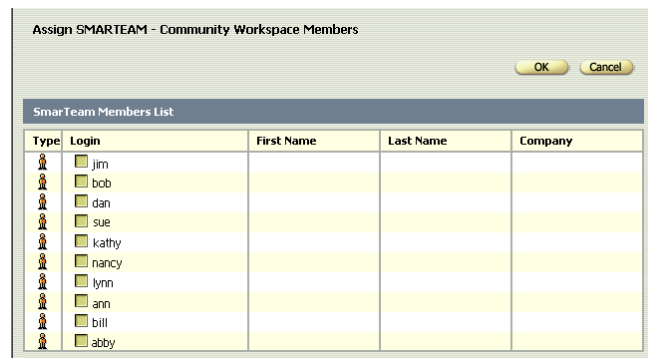
The **Assign SmarTeam – Community Workspace Members** page displays the names of authorized **SmarTeam** users. In

the **Login** column, click in one or more checkboxes to select the user(s) you want to assign to SmarTeam – Community Workspace.

Click **OK**  to assign the user(s) as new member(s) to SmarTeam – Community Workspace - or click **Cancel**  to abort - and return to the SmarTeam – Community Workspace **System Authorization** page.

When you select **OK** , the **SmarTeam** user(s) is/are assigned to the **System Members List**. (Note that after a user has been assigned to SmarTeam – Community Workspace, the user login name is removed from the **Assign SmarTeam – Community Workspace Members** page.)





In the **Permission List** section, select permissions to grant to this member, as described in the following table:



Type	Login	First Name	Last Name	Company
	<input type="checkbox"/> jim			
	<input type="checkbox"/> bob			
	<input type="checkbox"/> dan			
	<input type="checkbox"/> sue			
	<input type="checkbox"/> kathy			
	<input type="checkbox"/> nancy			
	<input type="checkbox"/> lynn			
	<input type="checkbox"/> ann			
	<input type="checkbox"/> bill			
	<input type="checkbox"/> abby			

Permission	Meaning...
Owner	Permits the member to enter this system as System Owner - the highest authority. All other permissions are automatically granted
Manage permissions and members	Permits the member to grant permissions to other members and manage members.
Create communities	Permits this member to create communities in the community.

Note: A member with the correct permissions can always assign permissions for a member at a later time.

- ❑ Click **Apply**  to save current changes for permissions assigned to a selected member and remain in the page to perform additional tasks.
 - ❑ Click **Refresh**  to refresh the SmarTeam – Community Workspace **System Authorization** page. (Any permission changes for members that have been made since the last save will be disregarded.)
5. Click **OK**  to save permission changes for members - or click **Cancel**  to abort permission changes made - and return to the **My Communities** page.

What to Do Next

The SmarTeam – Community Workspace system is now ready for members assigned **Create communities** permission to start creating communities. For a member with the correct permission, proceed to the next section, **Creating a Community**.


Creating a Community

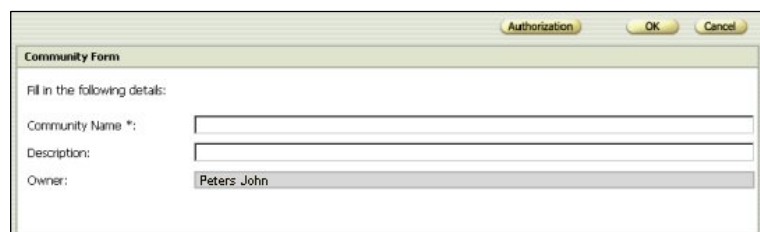
After adding/assigning members to your SmarTeam – Community Workspace system, members assigned **Create communities** permission can now start creating communities and adding members to the community.

After a community has been created, SmarTeam – Community Workspace members granted the correct authorizations within the community can use the community to manage their data management needs. Community members can create folders, add members, assign permissions, add and manage data within the community.

To create a community, proceed as follows:

1. In the **My Communities** page, click on the

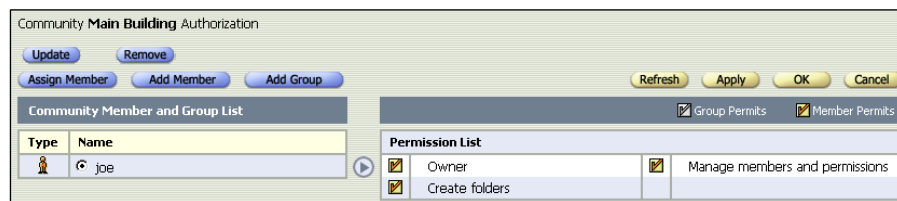
Administration  icon located in the top right corner to display the SmarTeam – Community Workspace **System Authorization** page.



2. In the **My Communities** page, click **New Community**  to display the **System Community Form**.

In the **Community Form**, complete the fields for the community name and description.

3. In the **Community Form** page, click **Authorization**  to display the **Community Authorization** page.




The screenshot shows the 'Community Main Building Authorization' window. It has buttons for 'Update', 'Remove', 'Assign Member', 'Add Member', 'Add Group', 'Refresh', 'Apply', 'OK', and 'Cancel'. Below these are two sections: 'Community Member and Group List' and 'Permission List'. The 'Community Member and Group List' has a table with 'Type' and 'Name' columns, showing a member named 'joe'. The 'Permission List' has a table with 'Permission' and 'Group Permits' columns, showing 'Owner' and 'Create folders' with checkboxes.

You can now proceed to add/assign members (and/or groups) to the new community and assign permissions applicable for the specific needs of each member in the community. (Members and permissions can also be assigned or updated at any time after creating the community.)

Important:

1. A name must be entered in the **Community Name** field before you can enter the **Community Authorization** page.
2. Entering the **Community Authorization** page automatically creates the new community, even if changes are not performed in this page. Selecting **Cancel** in the **Community Authorization** page does **not** remove this new community.

In the **Community [Name] Authorization** page, click **Assign Member**  to display the **Assign SmarTeam – Community Workspace Members** page.

The **System Members List** displays the login names of internal SmarTeam – Community Workspace members. Select the member(s) you want to assign to the community by clicking in the checkbox next to the member name(s).

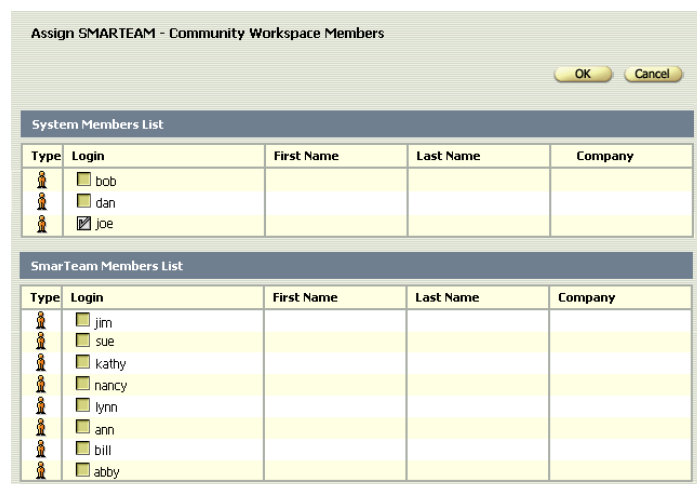
The **SmarTeam Members List** displays the login names of external **SmarTeam** members. Select the member(s) you want to assign to the community by clicking in the checkbox next to the member name(s).



Indicates your current selection



Indicates that this login name is already a member of this community (and cannot be unselected).



The screenshot shows the 'Assign SMARTEAM - Community Workspace Members' window. It has 'OK' and 'Cancel' buttons. Below are two lists: 'System Members List' and 'SmarTeam Members List'. Both lists have columns for 'Type', 'Login', 'First Name', 'Last Name', and 'Company'. The 'System Members List' shows members 'bob', 'dan', and 'joe' (checked). The 'SmarTeam Members List' shows members 'jim', 'sue', 'kathy', 'nancy', 'lynn', 'ann', 'bill', and 'abby'.

4. After selecting all members you want to assign to the community, click **OK** for your selection(s) to be accepted - or click **Cancel** to abort your selection - and return to the **Community [Name] Authorization** page.
5. In the **Community [Name] Authorization** page, continue to assign permissions to the newly-assigned member(s), if applicable.

Select a member from the **Community Member and Group List**, and in the **Permission List** section, select the permissions to grant to this member, as described in the following table:

Permission	Meaning...
Owner	Permits the member to enter this community as Community Owner - the highest

	authority. All other permissions are automatically granted.
Manage permissions and members	Permits the member to grant permissions to other members and manage members.
Create Folders	Permits this member to create folders in this community. A member assigned this permission automatically becomes the folder's administrator.

Note: A member with the correct permissions can always assign permissions for a member at a later time.

- ☐ Click **Apply** to save current changes for permissions assigned to a selected member and remain in the page to perform additional tasks.
 - ☐ Click **Refresh** to refresh the SmarTeam – Community Workspace **System Authorization** page. (Any permission changes for members that have been made since the last save will be disregarded.)
6. Click **OK** to save permission changes for members - or click **Cancel** to abort permission changes made - and return to the **My Communities** page.

What to Do Next

After communities have been created and members assigned, members with **Create folders** permission can now proceed to create folders within the community and assign permissions and members to the created folders.

For a member with the correct permission, proceed to the next section, **Working with Folders within the Community**.

Working with Folders within the Community

This section describes tasks that can be performed by members with permission to create folders after a community has been created within the SmarTeam – Community Workspace system.

A member granted **Create folders** permission by the **Community Owner** automatically becomes the **Folder Owner** and is responsible for administering every folder that he/she creates.

A **Folder Owner** controls access to each folder(s) created and can grant permissions to members according to their needs. Data objects are added to community folders and managed by members assigned the correct permissions, such as adding objects, deleting objects, performing Lifecycle operations, updating objects and more.


In this context, a **Folder Owner** has a heavy responsibility to the success or failure of a project, because permissions assigned by the **Folder Owner** to community members can be crucial to the success of the community. A community member with the ability to add/delete objects, change revisions and perform Lifecycle operations is in a position to make incorrect actions or misuse his/her permission rights, so careful consideration must be given when assigning permissions at all levels.

A **Folder Owner** can perform the following tasks:

- ❑ Organize members from the community:
 - ✓ Assign members to the folder
 - ✓ Assign groups to the folder
 - ✓ View member details
 - ✓ Remove members/groups from the folder
- ❑ Assign permissions, such as
 - ✓ Add Objects
 - ✓ Lifecycle management
 - ✓ Copy file
 - ✓ Create folders
 - ✓ Update
 - ✓ Delete
 - ✓ Workflow

Creating a Folder

For a member assigned **Create folders** permission, proceed as follows to create a folder within your community:

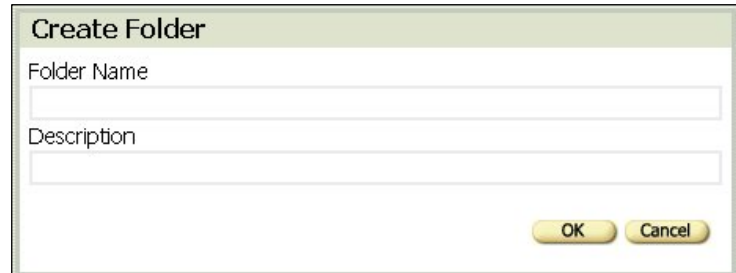
1. After logging in to SmarTeam – Community Workspace, the **My Communities** page displays a list of communities that you have authorization to enter.
2. Select and click on the community name to enter the community in which you want (and are authorized) to create a folder.
3. When creating a folder for the first time in this community, click on the **Create Folders**  icon located in the top right corner of the **Community** page.

(If this icon appears disabled, it indicates that you do not have permission to create folders for this community. In this case, contact the **Community Owner** to verify your status.)


If one or more folders have already been created in this community, in the left side of the **Community** page, use the **Communities Tree** browser to navigate to the position where you want to create a folder. You can either create the folder in the **Community** root directory or to an existing parent folder (if authorized), creating a sub-folder.

4. The **Create Folder** page appears.

5. In the **Create Folder** form, complete the fields for the folder name and description.

A screenshot of a 'Create Folder' dialog box. It has a title bar 'Create Folder' in a green header. Below the header, there are two text input fields: 'Folder Name' and 'Description'. At the bottom right, there are two buttons: 'OK' and 'Cancel'.

Note: The folder name does *not* have to be a unique name.

6. In the **Create Folder** form, click **OK**  to create the new folder - or click **Cancel**  to abort.

7. When you click **OK** in the previous step:

- ❑ An information page displays, advising you that the folder was created successfully.
- ❑ The newly-created folder's Profile Card displays in simplified format.
- ❑ An array of icons specific to community folders appears in the top right corner.
- ❑ The new folder appears in the **Communities Tree** browser.

8. If you need to create additional folders at this stage, repeat steps 3 - 6 above.

What to Do Next

After creating your folder(s) in the community, you are automatically defined as the **Folder Owner** for each folder that you created. You can now proceed to administer the folders by assigning members/groups to a folder and manage permissions.

Proceed to the next section, **Administering Folders**.

Administering Folders

As **Folder Owner**, you can now proceed to assign selected members/groups from the community to the folder(s) that you created previously. At the same time, you can grant permissions to these members (according to their needs) to enable them to add data (objects) in the folder and manage data.

Warning:

Careful consideration must be given when assigning permissions at all levels. A member with the ability to delete or change revisions - who may misuse his/her authorization rights - can be crucial to the success or failure of a project.

Assigning Members/Groups to Folders

To assign one or more members and/or groups to a folder that you created, proceed as follows:

1. In the **Community [Name]** page, click on the folder name that you created in the previous section.
2. The **Community Folders [Folder Name]** Profile Card appears, detailing the folder. An array of icons is displayed in the top right corner of the page for managing the folder and its contents.



3. Click on the **Folder Administration** icon to display the **Folder [Name] Authorization** page.

When you create a new folder, the **Folder Member and Groups List** automatically includes you as a member of this folder, as shown in the illustration (in this case, **joe**).

As the **Folder Owner**, you are automatically assigned all permissions, as defined in the **Permission List, Custom Role**.

4. To assign one or more members, continue with this step.

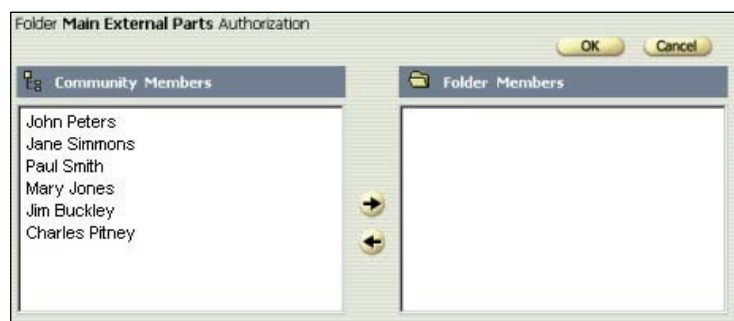
To assign one or more groups, proceed to step 5.

Assigning Members

You can now proceed to assign members to your folder, according to your project requirements.

- ❑ Click **Assign Member** to assign a member from the community to this folder; second **Folder [Name] Authorization** page displays.

The **Community Members** automatically displays all members currently assigned this community.



the


list

to

Note:

If you need to assign a member *not* yet assigned to this community, whether an external (SmarTeam – Community Workspace) or internal (**SmarTeam**) member, contact the

Community Owner or **System Owner** and request for the member(s) to be assigned to the community.

Select a member(s) to assign to this folder then click  to add your selection to the **Folder Members** list for this folder.

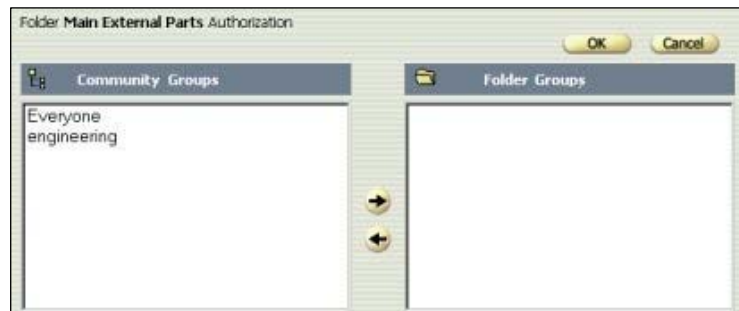
To select more than one member at the same time, hold down the keyboard's **Shift** button while selecting the member names.

To select more than one member at the same time out of order, hold down the keyboard's **Ctrl** button while selecting the member names.

5. Assigning Groups

To assign groups to a folder that you created, according to your project requirements, proceed as follows:

Click **Assign Group** to a group from the community to this folder; second **Folder [Name] Authorization** page displays.




folder to

assign the

The **Community Groups** list automatically displays all groups currently assigned to this community.

Note:




If you need to assign a group *not* yet assigned to this community, whether an external or internal group, contact the **Community Owner** or **System Owner** and request for the group(s) to be assigned to the community.

- ❑ Select a group(s) to assign to this folder then click  to add your selection to the **Group Members** list for this folder.

The group name **Everyone** appears by default and includes all members assigned to this community.

To select more than one group at the same time, hold down the keyboard's **Shift** button while selecting the group names.

To select more than one group at the same time out of order, hold down the keyboard's **Ctrl** button while selecting the group names.

6. After selecting community members/groups to be assigned to this folder, click **OK**  for your selection to be accepted - or click **Cancel**  to abort your selection - and return to the previous page in step 3.
7. When you select **OK** , all members/groups selected in the previous step are shown in the **Folder Member and Groups List**.
8. After assigning members/groups to this folder, you can now proceed to assign permissions to each member according to their needs.

Proceed to the next section, **Assigning Permissions to Folder Members/Groups**.

Assigning Permissions to Folder Members/Groups

Assigning permissions to members/groups is optional - a member or group not assigned permissions is able to (only) view data objects within a community of which he/she is a member.

By default, a new member or group is assigned the **View** permission, permitting the minimum option of viewing an object in the folder.





In the **Folder [Name] Authorization** page, proceed to assign permissions to members/groups assigned to your folder, as described below:

1. In the **Folder Member and Groups List**, click in the radio button for the member or group you want to assign permissions.
2. The **Permission List** section enables you to set permissions for a member or group selected in the previous step.

Click on the **Role** dropdown arrow to select from the available preset roles as described in the following table:

Role	Permissions selected...
View	View.
Review	Add; Update
Edit	Add; Update; Lifecycle; Copy file; View; Delete; Detach from Folder
Custom	Custom selection

Permissions assigned to groups are assigned to each member of the group and added to permissions assigned individually to the same member.

- ☐ Click **Apply**  to save current changes for permissions assigned to a selected member/group and remain in the page to perform additional tasks.
 - ☐ Click **Refresh**  to refresh the **mySmarTeam Folder [Name] Authorization** page. (Any permission changes for members that have been made since the last save will be disregarded.)
3. Click **OK**  to save permission changes for members/groups - or click **Cancel**  to abort permission changes made - and return to the **Community Folders [Folder Name] Profile Card** page.

What to Do Next

After members/groups and permissions have been assigned, members can now proceed to collaborate and manage data via SmarTeam – Community Workspace over the Internet.

Members with the correct permission can now proceed to the next section, **Managing Data**.

Managing Data

Members granted correct permissions by the **Folder Owner** of a specific folder can manage data objects within that folder, enabling full collaboration with other members over the Internet.

A member granted correct permissions can perform the following tasks:

- ☐ Object management
 - ✓ Add an object
 - ✓ Delete an object
 - ✓ Detach an object from a folder
 - ✓ Update an object
 - ✓ Copy a file
 - ✓ Add an object as a copy
- ☐ Perform Lifecycle operations
 - ✓ Check In
 - ✓ Check Out
 - ✓ Release
 - ✓ New Release
- ☐ Initiate a workflow process
- ☐ View an object

The **Folder Owner** can grant a member the following permissions:

Role	Permissions selected...
View	View.
Review	Add; Update
Edit	Add; Update; Lifecycle; Copy file; View; Delete; Detach from folder
Custom	Custom selection

Remember:

1. A member can only perform a specific management task on an object when granted the correct permission by the **Folder Owner**.
 2. To change permissions at folder level, contact the specific **Folder Owner**.
 3. Permissions assigned to groups are assigned to each member of the group and override permissions assigned individually to the same member.
-

Entering a Community

Your first step as a community member towards managing and collaborating over data within SmarTeam – Community Workspace is to enter the specific community that you have been assigned/added to by the **Community Owner**.

Proceed as follows to enter a community in order to manage data within the selected community's folder(s):

1. When you log in to SmarTeam – Community Workspace via your Internet browser, the **My Communities** page displays.
2. In the **My Communities** page, select the community you want to enter and click on the community name.
3. The selected community's **Home** page is displayed, enabling you to enter the community and perform your data management tasks according to permissions granted.
4. In the SmarTeam – Community Workspace toolbar, click on the **Explorer** button to enter the **Explorer** page.


Or


In the **Home** page, you can quickly access an object that you recently accessed. Select and click on the object from one of the four sections to quickly access the object in the **Explorer** or **TaskBox** page.

5. The **Explorer** page is divided into two sections and enables SmarTeam – Community Workspace members to quickly navigate between data located within the community.
 - The left side displays the **Communities Tree** (Browser)
 - The right side displays a selected object's Profile Card and the (folder) contents of the selected object.

In addition, an array of icons is displayed in the top right side specific to permissions granted to the logged in member, dependent on the selection in the **Communities Tree** (Browser)

Note:

Clicking **Synchronize**  in the top right side of a displayed Profile Card expands the **Communities Tree** to locate the displayed object in the tree.

Clicking **Refresh**  in the top right side of a displayed Profile Card refreshes the page. (Any changes made since the last save will be disregarded.)

6. Proceed to one of the following sections to manage data within the community folders according to your requirements:
 - ☐ [Object/File Management](#)
 - ☐ [Viewing an object](#)
 - ☐ [Performing Lifecycle Operations](#)
 - ☐ [Initiating a Workflow Process](#)

Object/File Management

This section describes how to perform the following management tasks on data objects within a folder *providing you have the correct permissions*:

- Add an object
- Delete an object


- Update an object
- Copy a file
- Add an object as a copy

Note: The following procedures assume that you have already logged in to SmarTeam – Community Workspace and entered the community in which you want to perform specific management tasks as described in the previous section [Entering a Community](#).

Adding an Object

Proceed as follows to add an object to a specific community folder:

1. In the **Explorer** page, in the **Communities Tree** (Browser), expand the tree to display all folders.
2. Select the folder in which you want to add an object. The selected folder's Profile Card displays in the right side and an array of icons appears in the top right side.

3. Click on the **Add Object**  icon to display the **Select an Object Class** window.
4. The **Select an Object Class** window enables you to define the class for the object you want to add (to the folder). Expand the **Classes** tree and select the appropriate class for this object.
5. If the object is file managed, then the **Select a File** window now displays. Click **Browse...** to open a standard **Choose file** window to navigate to the directory/folder where the object you want to add is located.

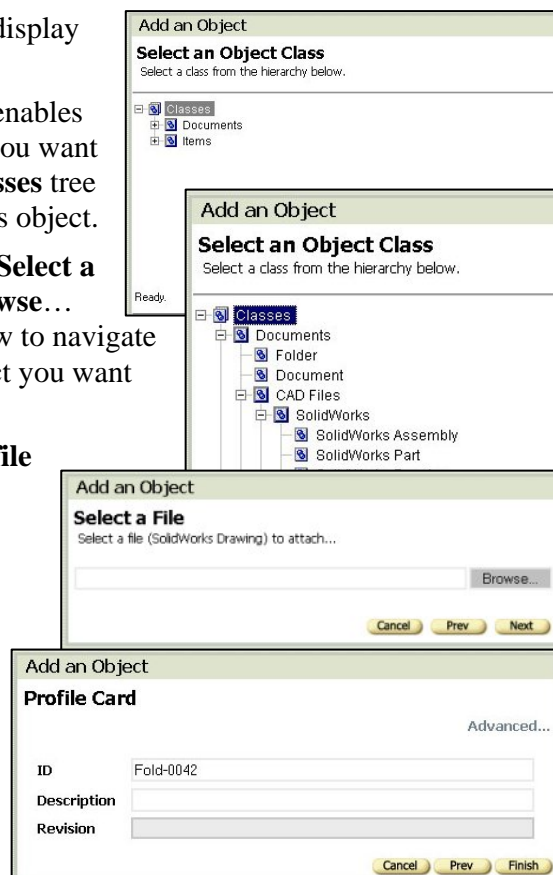
After locating the file, in the **Choose file** window click **Open** to enter the full location path in the **Select a File** window.

6. In the **Select a File** window, click **Next** to continue.

A Profile Card is generated for the new object and displays in the right side.

The Profile Card contains attributes as defined by the System Owner for specific classes.

- ❑ The Profile Card can be displayed in Simplified or Advanced format; the latter displays all attributes defined for this class.
- ❑ To switch between formats, click the **Advanced...** link or **Simplified...** link at the top right side.
- ❑ A unique ID number is automatically generated and displayed in the **ID** field (if this option is set by the **SmarTeam** System administrator).



7. If necessary, click **Advanced...** to complete specific attribute fields. When adding a file, check that a file type is selected in the **File Type** field; if not, click on the dropdown arrow and select a suitable file type from the dropdown list.

8. Click **Finish** to complete the process and return to the **Community [Name]** page.

- ☐ The object is added to the folder in the **Communities Tree**.
- ☐ The object's state is **Checked In**.
- ☐ The object's file is checked in to the vault.
- ☐ The object's Profile Card is displayed in **Simplified** format in the right side, displaying a thumbnail picture (if the format is supported) of the object and the following tab pages:

- √ Attributes
- √ View
- √ Revisions
- √ Notes

- ☐ An array of icons is displayed in the top to enable members to various tasks, depending on individual member permissions.




right side
perform

9. After the object has been added to the community, it is now available to community members for collaboration over the Internet.

Providing a member has the correct permissions, management tasks can be performed on the object, as applicable.

Delete an Object

Proceed as follows to delete an object from a specific community folder:


1. Locate and highlight the object that you want to delete then click on the **Delete Object**  icon.
2. A message window displays, requesting confirmation to delete the selected object.
 - ☐ Click **Yes** to continue and delete the object; the selected object is immediately deleted from the community folder.


Or

- ☐ Click **No** to abort the delete operation.


Update an Object

Proceed as follows to update an object in a specific community folder:

1. Locate and highlight the object that you want to update then click on the **Update Object**  icon to display the object's Profile Card in the right side in **Update** mode.
2. You can now proceed to update fields in the Profile Card, as required.


- ❑ Click **Update**  to continue and update the object's Profile Card and exit the update operation.

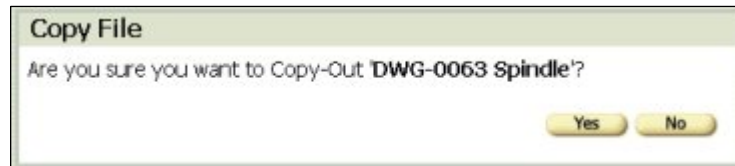
Or

- ❑ Click **Cancel**  to abort any changes made and exit the update operation.

Copy a File

Proceed as follows to copy a file from a specific community folder:

1. In the **Explorer** page, in the **Communities Tree** (Browser), expand the tree to display all folders.
2. Select and expand the folder in which you want to copy a file. The selected folder's Profile Card displays in the right side and an array of icons appears in the top right side.
3. Locate and highlight the object that you want to copy then click on the **Copy File**  icon.
4. A message window requesting confirmation to copy file.



displays,
the selected

- ❑ Click **Yes** to continue and copy the file.

Or

- ❑ Click **No** to abort the copy operation.

5. Selecting **Yes** in the previous step displays a message stating that the file was successfully copied and providing a link for you to copy the selected file.



(the file
a
File


- ❑ Click on the link (the file name) to display standard Internet **Download** window.

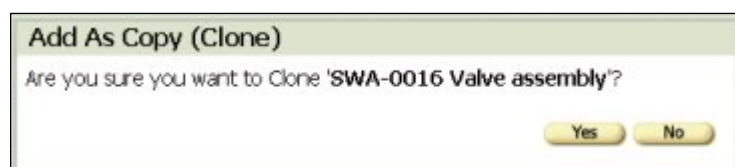
Or

- ❑ Right click on the link to display a popup menu then select **Save Target As...** or **Save Link As...** to display a standard Internet **File Download** window.
 - ❑ In the **Save As...** window, navigate to the directory/folder where you want to download and save the copied file then click **Save** to copy the file.
6. The copy operation is now complete. You can now access the file copied to the location in the previous step.

Add an Object as a Copy

Proceed as follows to copy an object and add it (as a copy) to the same community folder:

1. Locate and highlight the object that you want to add as a copy then click on the **Add as Copy**  icon.
2. A message window displays, requesting confirmation to copy (clone) the selected object.



copy
object.

- ❑ Click **Yes** to continue and (clone) the

Or

- ❑ Click **No** to abort the copy operation.

3. Selecting Yes in the previous step displays a message stating that the object was successfully copied (cloned).
 - ❑ The copied object is added to the **Communities Tree** (Browser) and its Profile Card is displayed in the right side.
 - ❑ A new ID number is assigned to the copied object (if this option is set by the **SmarTeam** System administrator).
 - ❑ The copied object's state is defined as **New**.
4. The **Add as Copy** operation is now complete - you can now access the object and perform management tasks, as applicable.

Viewing an object

If you only have permission to view an object, proceed as follows to view an object in a community folder:

1. In the **Explorer** page, in the **Communities Tree** (Browser), expand the tree to display all folders.
2. Select the folder in which you want to view an object - if necessary, expand the folder to view the folder's contents.

Or

Run a **Quick Search** or **Advanced Search** to locate the object within the community.

3. Locate and click on the object you want to view. The selected object's Profile Card displays in the right side, enabling you to view details about the object in the attribute fields and in the tab pages.

Note: If you need to change your permissions in the community or in a folder to manage a specific object, contact the **Community Owner** or **Folder Owner**, as applicable.

Performing Lifecycle Operations


This section describes how to perform the following Lifecycle operations on data objects within a folder *providing you have the correct permissions*:

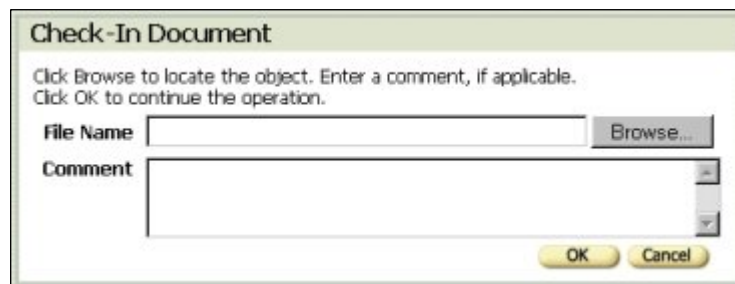
- ☐ Check In
- ☐ Check Out
- ☐ Release
- ☐ New Release

Note: The following procedures assume that you have already logged in to SmarTeam – Community Workspace and entered the community in which you want to perform specific management tasks as described in the section [Entering a Community](#).

Check In

Proceed as follows to perform a **Check In** operation (to SmarTeam Vault) on an object in a specific community folder:

1. In the **Explorer** page, in the **Communities Tree** (Browser), expand the tree to display all folders.
2. Select and expand the folder in which you want to check in an object to the vault. The selected folder's Profile Card displays in the right side and an array of icons appears in the top right side.
3. Locate and highlight the object that you want to check in to the vault then click on the **Check In**  icon.
4. The **Check In Document** window displays.

The image shows a 'Check-In Document' dialog box. It has a title bar 'Check-In Document'. Inside, it says 'Click Browse to locate the object. Enter a comment, if applicable. Click OK to continue the operation.' There is a 'File Name' text box with a 'Browse...' button to its right. Below that is a 'Comment' text box. At the bottom right are 'OK' and 'Cancel' buttons.

Click **Browse...** to open standard **Choose file** to navigate to the directory/folder where the object you want to check in is located.

After locating the file, in the **Choose file** window click **Open** to check the object in to the vault.

The object's Profile Card displays to complete the **Check In** operation. The **State** attribute field now shows the object's present state as **Checked In**.

Important:


When performing a **Check In** operation on CAD components (an assembly or drawing), you must first create a zip file (for selecting as described in step 4) that includes the following:

- ☐ The top-level component
 - ☐ Any new dependent or child objects
 - ☐ Any dependent or child objects that have been changed
-

Check Out

Proceed as follows to perform a **Check Out** operation on an object in a specific community folder:

1. In the **Explorer** page, in the **Communities Tree** (Browser), expand the tree to display all folders.

2. Select and expand the folder in which you want to check out an object. The selected folder's Profile Card displays in the right side and an array of icons appears in the top right side.
3. Locate and highlight the object that you want to check out from the vault then click on the **Check Out**  icon.
4. A message window displays, requesting confirmation to check out the selected object.

- ❑ Click **Yes** to continue and check out the object.

Or

- ❑ Click **No** to abort the check out operation.

Selecting **Yes** in the previous step displays a message stating that the object was successfully checked out and providing a link for you to copy the selected object.

- ❑ Click on the link (the file name) to display a standard Internet **File Download** window.

Or

- ❑ Right click on the link (the file name) to display a popup menu then select **Save Target As...** or **Save Link As...** to display a standard Internet **File Download** window.
 - ❑ In the **Save As...** window, navigate to the directory/folder where you want to download and save the copied object then click **Save** to copy the object.
6. The object's Profile Card displays to complete the **Check Out** operation. The **State** attribute field now shows the object's present state as **Checked Out**.
 7. The check out operation is now complete. You can now access the checked out object copied to the location in step 5.




Important:

When performing a **Check Out** operation on CAD components (an assembly or drawing), a zip file is automatically created that includes all components. After checking out these components and opening the zip file, you can select any component(s) for changing in your CAD application.

Release an Object

Proceed as follows to perform a **Release** operation on an object in a specific community folder:

1. In the **Explorer** page, in the **Communities Tree** (Browser), expand the tree to display all folders.
2. Select and expand the folder in which you want to perform a **Release** operation on an object. The selected folder's Profile Card displays in the right side and an array of icons appears in the top right side.
3. Locate and highlight the object that you want to release from the vault then click on the **Release**  icon.
4. A message window displays, requesting confirmation to release the selected object.



- If necessary, enter text into the **Comment** text box for the enter a comment
- Click **OK** to continue and release the object.

Or

- Click **Cancel** to abort the **Release** operation.


5. The object's Profile Card displays to complete the **Release** operation.

- The **State** attribute field now shows the object's present state as **Released**.
- The **Revision** attribute field now shows the object's present revision number.

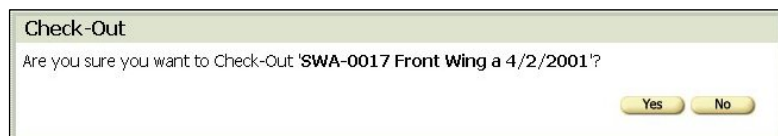
6. The **Release** operation is now complete.

New Release

Proceed as follows to perform a **New Release** operation on an object whose state is **Released** in a specific community folder:

1. In the **Explorer** page, in the **Communities Tree** (Browser), expand the tree to display all folders.
2. Select and expand the folder in which you want to perform a **New Release** operation on an object whose state is **Released**. The selected folder's Profile Card displays in the right side and an array of icons appears in the top right side.
3. Locate and highlight the object that you want to perform a **New Release** operation from the vault then click on the **New Release**  icon.
4. A message window displays, requesting confirmation to check out the selected released object. (Note the object's name includes the version number and date.)

- Click **Yes** to continue and check out the released object.

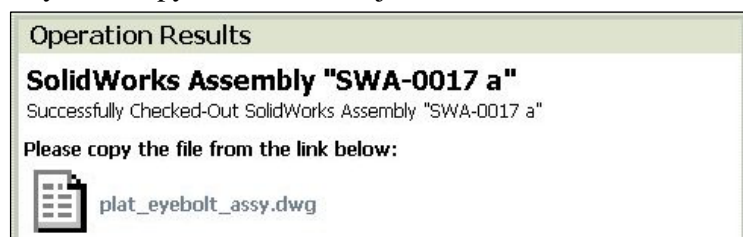


Or

- Click **No** to abort the **New Release** operation.

5. Selecting **Yes** in the previous step displays a message stating that the object was successfully checked out and providing a link for you to copy the selected object.

- Click on the link (the file name) to display a standard Internet **File Download** window.



Or

- Right click in the message window to display a popup menu then select **Save Target As...** or **Save Link As...** to display a standard Internet **File Download** window.
- In the **Save As...** window, navigate to the directory/folder where you want to download and save the copied object then click **Save** to copy the object.

6. The object's Profile Card displays to complete the **New Release** operation. The **Revision** attribute field now shows the object's new revision number.

7. The **New Release** operation is now complete. You can now access the newly-released object via the **Communities Tree** (Browser).

Important:


When performing a **New Release** operation on CAD components (an assembly or drawing), a zip file is automatically created that includes all components. After checking out these components and opening the zip file, you can select any component(s) for changing in your CAD application.

Initiating a Workflow Process

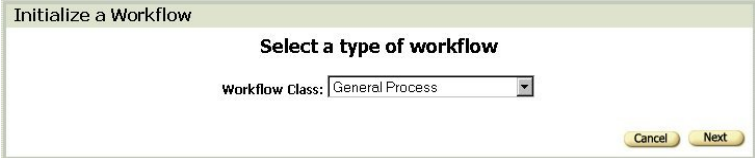
This section describes how to initiate a workflow process on data objects within a folder *providing you have the correct permissions*:

Note: The following procedures assume that you have already logged in to SmarTeam – Community Workspace and entered the community in which you want to perform specific management tasks as described in the previous section, [Entering a Community](#).

Proceed as follows to initiate a workflow process on a data object located in a specific community folder:

1. In the **Explorer** page, in the **Communities Tree** (Browser), expand the tree to display all folders.
2. Select and expand the folder in which you want to initiate a workflow process on a selected object. The selected folder's Profile Card displays in the right side and an array of icons appears in the top right side.
3. Locate and highlight the object that you want to initiate a workflow process then click on the **Initiate Process**  icon.
4. The **Initialize a Workflow** window displays.

- ❑ Click on the **Workflow Class** dropdown arrow and select a flowchart type.
- ❑ Click **Next** to continue.




Or

- ❑ Click **Cancel** to abort the operation.

The next Initialize a Workflow window displays.

- ❑ Select an available flowchart according to the workflow type selected in the previous step.
- ❑ Click **Next** to continue.



Or

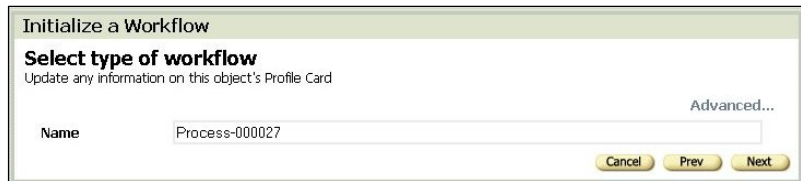
- ❑ Click **Prev** to return to the previous window.

Or

- ❑ Click **Cancel** to abort the operation.

5. The next **Initialize a Workflow** window displays the object's Profile Card for the process.

- ❑ A process number for the object is automatically assigned and displayed in the **Name** field.



The screenshot shows a window titled "Initialize a Workflow" with a sub-header "Select type of workflow". Below this, it says "Update any information on this object's Profile Card". There is a text field labeled "Name" containing the text "Process-000027". To the right of the text field is a link labeled "Advanced...". At the bottom right of the window are three buttons: "Cancel", "Prev", and "Next".

- ❑ Click **Advanced...** to display all Profile Card attributes and complete/change any pertinent fields, as required.
- ❑ Click **Next** to continue.

Or

- ❑ Click **Prev** to return to the previous window.

Or

- ❑ Click **Cancel** to abort the operation.

6. The next **Initialize a Workflow** window enables you to add related objects to the workflow process.

- ❑ Click on the link **Click Here to Add** to display the **Advanced Search** window and generate a search for related objects to attach to this process.



The screenshot shows a window titled "Initialize a Workflow" with a sub-header "Select Related Objects". Below this, it says "Select Related Object(s)". There is a section titled "Objects of type 'Documents' linked to flow:" with a checkbox next to "DWG-0035 Bolt 2.5". Below this section is a link labeled "Click Here To Add / Click Here To Remove". At the bottom right of the window are three buttons: "Cancel", "Prev", and "Finish".

- ❑ To remove related objects added to the process, check the object(s) checkbox(es) then click on the link **Click Here to Remove**.
- ❑ Click **Finish** to complete initiating the workflow process.

Or

- ❑ Click **Prev** to return to the previous window.

Or

- ❑ Click **Cancel** to abort the operation.

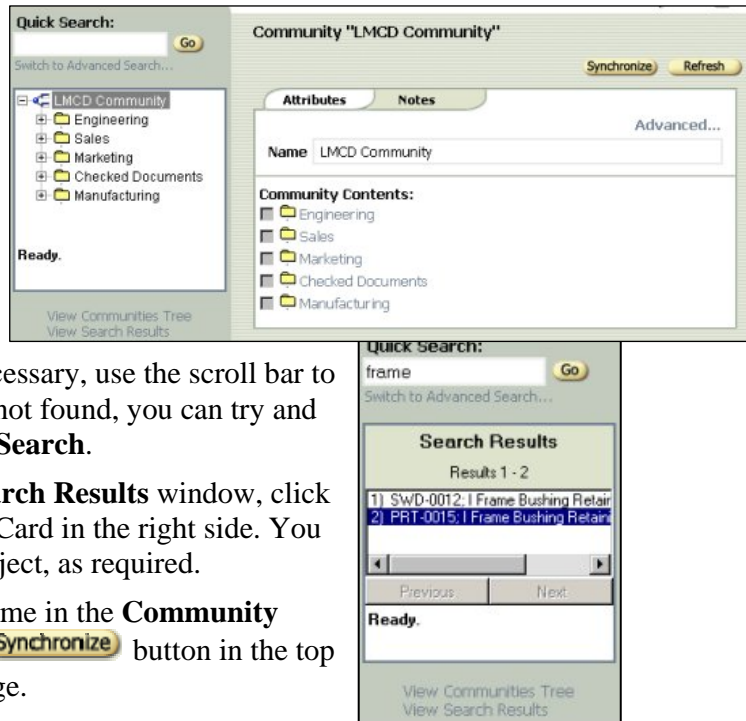
7. The **TaskBox** page now displays, and the Profile Card for the workflow process initiated in the previous steps is shown.

Running a Quick Search

SmarTeam – Community Workspace enables a community member to run a quick search to locate objects within the community that he/she has permission to view.

To run a quick search from a community, proceed as follows:

1. Enter search details in the **Quick Search** field; as illustrated, located in the left side of the community page. Any text string can be entered.
2. In the **Quick Search** area, click **Go** to run the search.
3. Search results are displayed in the **Search Results** window. If necessary, use the scroll bar to browse the results. If the object is not found, you can try and locate it by running an **Advanced Search**.
4. After locating the object in the **Search Results** window, click on the object to display its Profile Card in the right side. You can now proceed to manage the object, as required.
5. To locate and display the object name in the **Community Tree**, click on the **Synchronize** button in the top right corner of the community page.

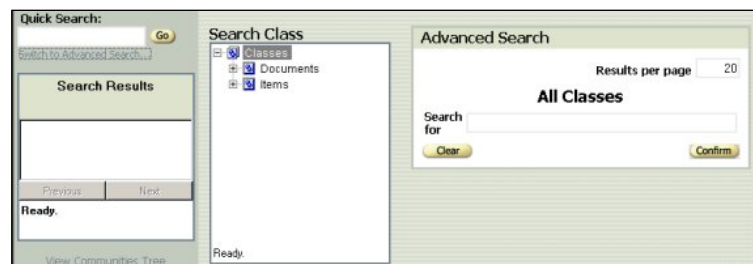


Running an Advanced Search

SmarTeam – Community Workspace enables a community member to run an advanced search to locate objects within the community that he/she has permission to view.

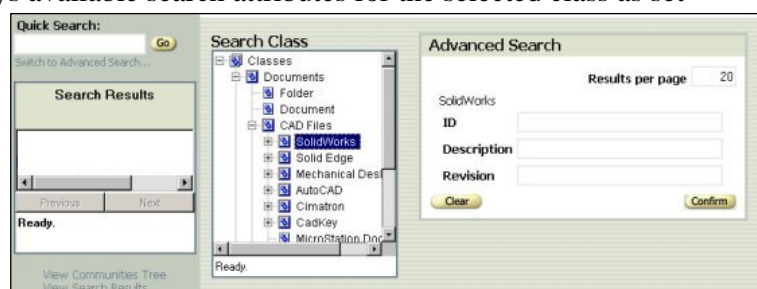
To run an advanced search from a community, proceed as follows:

1. In the **Search** area located in the left side of the community page, click **Switch to Advanced Search** to display the **Advanced Search** page.
2. In the **Search Class** window, expand the **Classes** tree and select the class from which you want to run an advanced search.



The **Advanced Search** window, now displays available search attributes for the selected class as set by the **System Owner**.

3. In the **Advanced Search** window, enter search details in the attribute fields, as applicable.

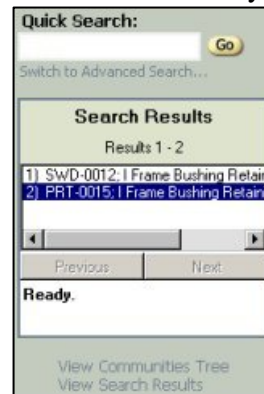


- ❑ Click **Confirm** to run the search
- ❑ Click **Clear** to remove any entries from the attribute fields

Note: Attribute fields displayed in the **Advanced Search** window are defined by the **System Owner**.

If necessary, contact the **System Owner** to define additional (or specific) attributes.

4. When you click **Confirm** to run the search, search results are listed in the **Search Results** window. If necessary, use the scroll bar to browse the results.
5. After locating the object in the **Search Results** window, click on the object to display its Profile Card in the right side. You can now proceed to manage the object, as required.
6. To locate and display the object name in the **Community Tree**, click on the **Synchronize** button in the top right corner of the community page.



Configuring a Custom (non-default) URL for the SmarTeam – Community Workspace Application

The default application name for SmarTeam – Community Workspace is mySmarTeam.

In order to change this default value and configure a custom URL for SmarTeam – Community Workspace, perform the following steps.

Configuration for IIS:

1. Change the name of the virtual directory (application name) of SmarTeam – Community Workspace using Internet Services Manager. For example, change the application name from mySmarTeam to myCMT.

2. Edit the web.config file located in <SmarTeam Installation Path>\SmarTeam\mySmarTeam\Web by locating the following entry:

```
<add key="SmarTeam.Std.Applications.CommunityWorkspace.AppName" value="/mySmarTeam"/>
```

Note: If the entry does not exist, add it manually.

3. Replace the value “/mySmarTeam/” with your custom value for SmarTeam – Community Workspace application. For example:

```
<add key="SmarTeam.Std.Applications.CommunityWorkspace.AppName" value="/myCMT"/>
```

APPENDIX A: TROUBLESHOOTING

This section is aimed at providing a troubleshooting guide when problems occur trying to launch SmarTeam – Community Workspace after installation on the designated SmarTeam – Community Workspace server.

Verifying the Correct Database

- Verify the database connection via the **Database Connection Manager** utility: For more information, refer to the *Database Connection Manager Guide*
- Try to publish an object to SmarTeam – Community Workspace via the **Publish to SmarTeam – Community Workspace Wizard**, entering as the user who configured the SmarTeam – Community Workspace **Data Model Wizard** (to update the **SmarTeam** database). When a **SmarTeam** user fails to publish an object via the **Publish to SmarTeam – Community Workspace Wizard**, check that the publishing script (stdMSTPublisher.ebs) is in the correct location and that it is under the correct name <**SmarTeam** root directory>\script.

Documentation References

- SmarTeam – Community Workspace Getting Started Guide, Section II Updating the SmarTeam Database
- A User's Guide to SmarTeam – Community Workspace Utilities, Section II, Publishing to SmarTeam – Community Workspace Wizard

SmarTeam – Community Workspace Directory (mySmarTeam)

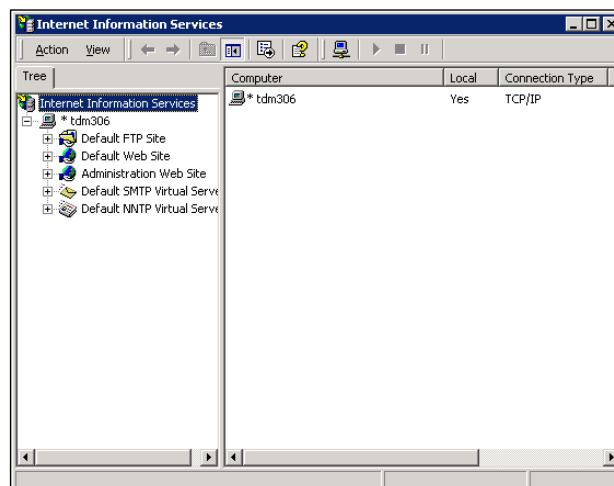
Verify that a directory named **mySmarTeam** has been created on the designated server.

1. From the **Start** button, select **Settings, Control Panel, Administrative Tools, Internet Services Manager** to display the **Internet Information Services** tree.

2. In the **Internet Information Services** tree, tree then select and expand **Web Site**.

3. Check that the default **mySmarTeam** appears in the **Default Web Site**.

If the default web site **mySmarTeam** does not will need to add and define it described in **Appendix A, Configuring the Internet Information Services Utility**,



expand the **Default**

web site tree under

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mySmarTeam Directory Properties

Verify that parameters configured correctly in **mySmarTeam** directory.

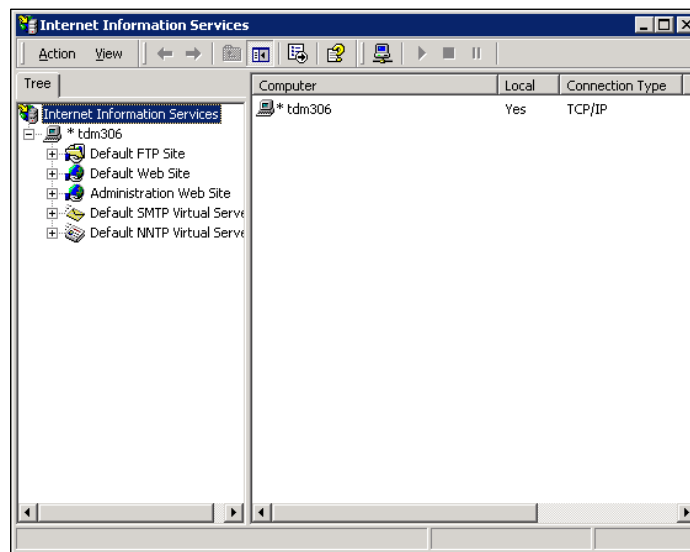
1. From the **Start** button, **Settings, Control Panel, Administrative Tools, Services Manager** to **Internet Information Services** tree.

2. In the **Internet Information Services** expand the tree then expand **Default Web**

3. Select the default web site **mySmarTeam** and right click to display a popup menu. From the popup menu select **Properties** to display the **mySmarTeam Properties** window.

- In the **mySmarTeam Properties** window, click the **Virtual Directory** tab not already displayed above).

Verify that the entry in the **Path** field is **<SmarTeam**

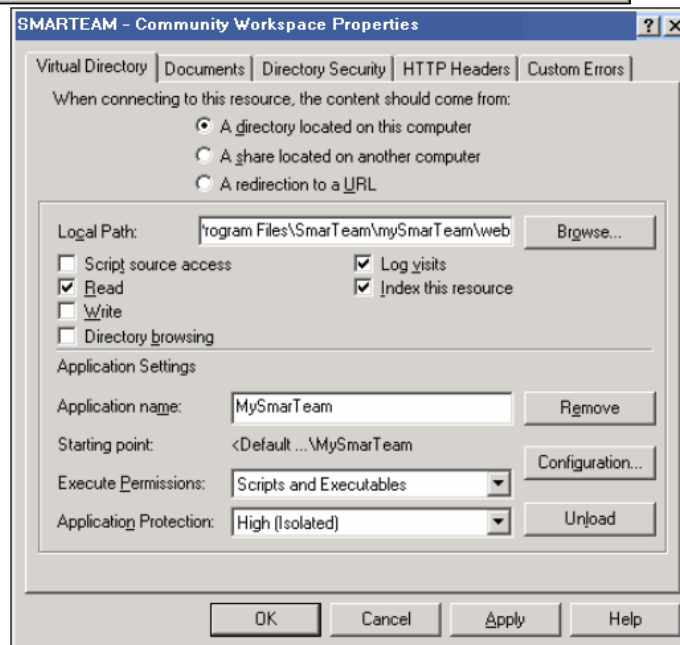


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directory>\mySmarTeam\web.

Verify that the entry in the **Application name** field is **mySmarTeam**.

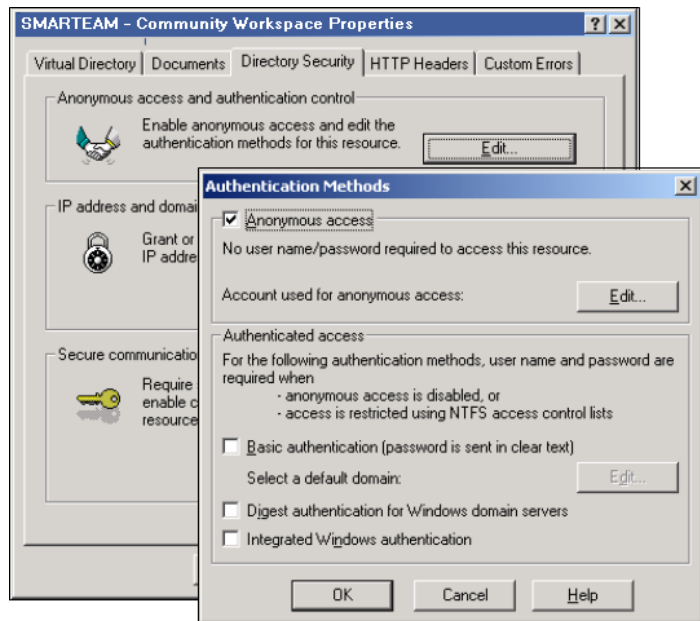
Verify that in the **Application Protection** field, **High (Isolated)** is selected. If this option is not selected, click on the dropdown arrow and select it from the dropdown list.

- ❑ In the **mySmarTeam Properties** window, click the **Directory Security** tab (if already displayed).

In the **Anonymous access authentication control** section, click **Edit...** to the **Authentication Methods** window above.

In the **Anonymous access** section, click **Edit...** to the **Anonymous User Account** window.

In the **Anonymous User Account** window, verify that entry in the **Username** field is correct.



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For example:

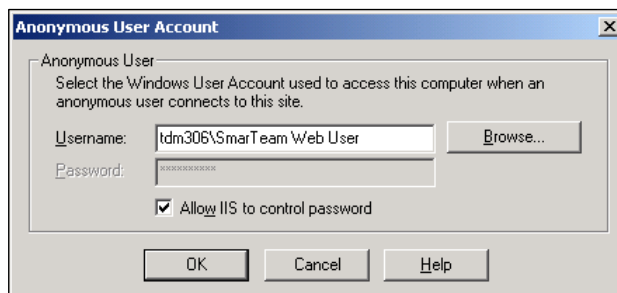
TDM306\SmarTeam Web User

TDM306 is the server's name or the domain name

SmarTeam Web User is name entered for the **SmarTeam**

If the **Username** field is not in the **Anonymous User**

window click **Browse...** to display the Select User window and select **SmarTeam Web User** from the listed names.



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4. In the **mySmarTeam Properties** window, click **OK** to save your changes (if applicable) and exit the window.

Component Services Configuration

Verify that the **User** field in the **IIS-(Default Web Site//Root/mySmarTeam) Properties** window is configured correctly in Configuring the Component Services Utility.

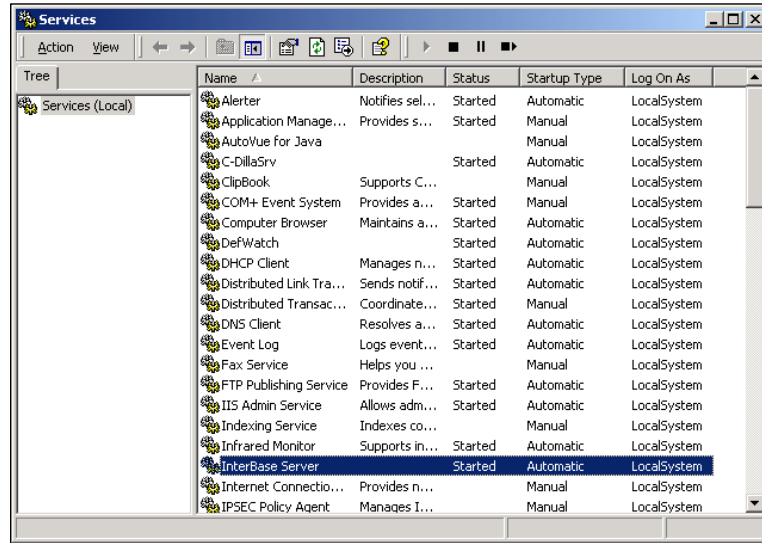
SmarTeam Standalone Installation

When a **SmarTeam** standalone application is connected to an InterBase database, verify that the database runs as a service and not as a standalone application by performing the following steps:

1. From the **Start-** select **Settings, Panel, Administrative Services** to display the **Services** window.
2. In the **Services** verify that the **InterBase Server** set to run as a

If the **InterBase** name does not appear **Services** window, the following procedure:

- a. Shutdown the InterBase server.
- b. In the SmarTeam – Community Workspace **CD-ROM**, locate the **Kits** directory and copy the file **InterbaseAsService.bat** to the **\\SmarTeam\\IbServer\\bin** directory.
- c. After copying the file into the directory, double-click on it to run the program.
- d. Delete the InterBase from the Startup



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