



TEAMCENTER

Briefcase Browser

Teamcenter 2412

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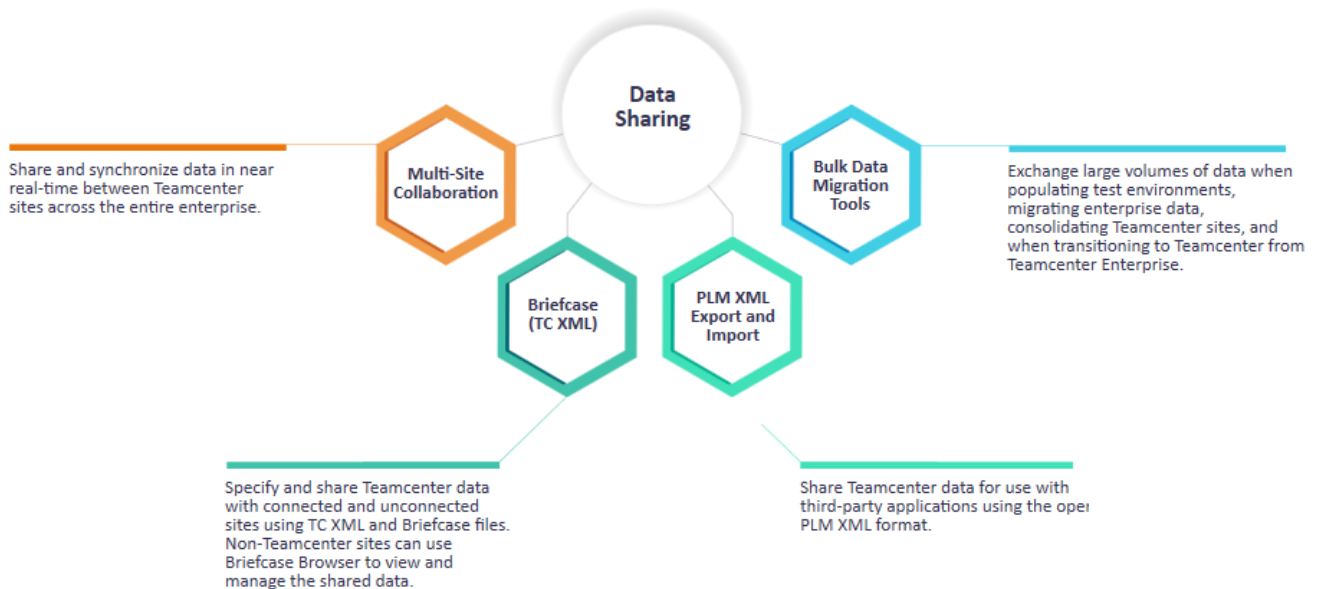
1. Getting started with Briefcase Browser

Sharing data with Briefcase Browser

Supplier sites without Teamcenter access (unmanaged suppliers) can use Briefcase Browser to work with Teamcenter Briefcase files. Briefcase Browser is a Windows application.

A Briefcase file is a compressed file that contains TC XML formatted data and the associated binary CAD and JT files that create a valid Teamcenter product structure. Briefcase files let you exchange product data containing computer aided design (CAD) and JT files, with their associated metadata, with sites that use Teamcenter to manage their product data

Briefcase Browser is one of several solutions Teamcenter offers to meet different data sharing needs.



Where do I go from here?

Administrator	
Enabling Briefcase Browser for users.	See Requirements for using Briefcase Browser .
Configuring and exchanging Teamcenter data.	See Data sharing concepts.
Learning about Multi-Site Collaboration.	See Using Multi-Site Collaboration.
Business User	
Learning more about Briefcase Browser.	See Briefcase Browser capabilities and Basic tasks in Briefcase Browser .

Using Briefcase Browser.	See Starting Briefcase Browser and Opening and working with Briefcase files .
Working with CAD files.	See Open a CAD file (create a new CAD object) .

Briefcase Browser capabilities

Teamcenter offers a broad range of features. Although Briefcase Browser supports many of these features, it does not support them all. Unless a feature is specifically identified as supported here, it may be not supported.

General capabilities

- Open and display unmanaged Briefcase files.

Only datasets that are attached to item revisions are displayed. Briefcase Browser shows only CAD attachments for replica parts when you open or synchronize a Briefcase file.

- By default, you can update CAD modified datasets in a Briefcase file.
- Open JT files in JT2Go or Teamcenter lifecycle visualization.
- With the Briefcase Browser JT plugin installed, open and update JT files supplied to you in Briefcase files. When existing JT files are not delivered in the Briefcase file, Briefcase Browser automatically creates component and assembly JT files based on the contents of the Briefcase file.
- Distinguish objects based on site ownership, and allow user modifications when rules permit.
- Create a Briefcase file from a new CAD assembly.
- Open a Briefcase file that contains incomplete CAD data. By default, Briefcase Browser completes CAD incomplete packages automatically. If Briefcase Browser cannot complete the CAD assembly, it displays a warning message indicating the completion process failed and provides the reason.

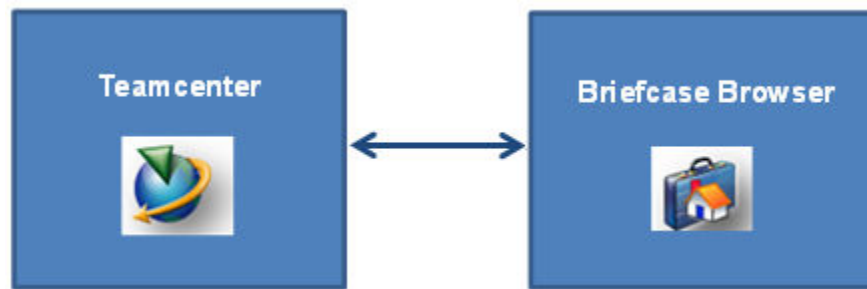
If a CAD assembly is incomplete, Briefcase Browser completes it by creating placeholder parts for missing parts so the Briefcases open the CAD assembly without a broken node.

- Open a Briefcase file containing:
 - CAD data that contains multiple revisions of an item
 - CAD data that contains a precise configuration
 - CAD data that contains variants

- CAD data that contains partial BOM data. Unselected siblings are displayed as stubs when the imported file is for design change. Unselected siblings are not in the import file when the imported file is for reference.
- CAD data that contains delta data
- Create a Briefcase file with non-CAD attachments such as Microsoft Word and JT along with the CAD assembly data.
- Add non-CAD datasets.
- Briefcase Browser does not support multiple root assemblies in a single Briefcase file.

Transferring files between managed and unmanaged sites

Briefcase Browser is intended and supported for exporting Briefcase files from managed sites for use at unmanaged sites and for importing files from unmanaged sites into managed sites as follows:



Because you can use Briefcase files to transfer Teamcenter data between both managed (OEM) and unmanaged (supplier) sites, you must be aware of what to expect when transferring data between different site types.

Caution:

When you open a Briefcase file that is targeted to another Teamcenter site, save, launch, synchronization, and compare operations are not supported at your site.

Similarly, when you open a Briefcase file that was created at an unmanaged (non-Teamcenter) site, save, launch, synchronization, and compare operations are not supported at your site.

If you attempt to use the listed operations in these transfer scenarios, results may be reliable.

NX-specific capabilities

- Display a warning when a Briefcase file containing NX data is not CAD complete. This behavior is configurable and is not the default behavior. A Briefcase file is CAD complete if *all* or *none* of the item revisions are associated with a **UGMASTER** dataset type and the structure has not been modified in Teamcenter.

- Create new **UGMASTER** and **UGPART** (base, model, and drawings) dataset types in NX and add them and their associated TC XML data to a Briefcase file.
- Briefcase Browser does not support absolute positioning. Also, it does not support Briefcase files containing NX data with substitutes or alternatives, but these do not generate errors when creating the Briefcase file. However, Briefcase Browser does display errors if you attempt to read a Briefcase file that contains any of the unsupported data.

Caution:

NX part files contain locale-specific data in a part's history. Because Briefcase Browser communicates directly with NX, both applications must use the same locale. Do not change the locale of the NX host as this determines the locale used in NX part files. Changing the NX locale can cause a Briefcase file that contains NX parts to fail when you save it in Briefcase Browser.

The Briefcase Browser locale is also determined by the operating system locale unless it is overridden by a start-up setting. Siemens Digital Industries Software recommends that you install Briefcase Browser on the host that is running NX and allow the operating system to determine the Briefcase Browser locale. This avoids errors resulting from data that is in the wrong locale.

CATIA-specific capabilities

- Create new **CATProduct**, **CATPart**, and **CATDrawing** dataset types in CATIA and add them and their associated TC XML data to a Briefcase file.
- Open a Briefcase file containing CATIA data that contains incomplete CAD data. Briefcase Browser completes the CAD assembly by creating a reference structure during the **postbriefcase** open activity if the exported data file is for reference and contains build component structure.

If the Briefcase file is missing the CAD root node, Briefcase Browser creates a **CATProduct** or **CATPart** object in the root file path for use in viewing the CAD data in CATIA and for synchronization actions. If other nodes are missing, Briefcase Browser creates a reference component on its immediate parent.

If Briefcase Browser cannot complete the CAD assembly, it displays a warning message indicating the completion process failed and provides the reason.

- When opening a Briefcase file exported for reference transfer, Briefcase Browser creates a root **CATProduct** object and builds the component structure with **CATProduct** and CATIA graphical representation (CGR) datasets. Because reference transfers are read-only, synchronization is not available. Using the **View in CATIA** command on the **Tools** menu or the toolbar launches the Briefcase Browser built component structure in CATIA.

For more information, see the CATIA plugin (BBpC) documentation.

Requirements for using Briefcase Browser

Prerequisites

There are no prerequisites for installing and running Briefcase Browser. However, to perform specific actions in Briefcase Browser, there are some requirements:

- Briefcase Browser requires a 64-bit Windows operating system.
- You must have Java Runtime Environment (JRE) 1.8 or later installed.

For NX, the JRE version must be the same as that required by the version of NX you are using.

- To create new NX assemblies or modify existing NX assemblies or components, you must have Siemens Digital Industries Software NX 9.0 or later installed.
- To create new CATIA assemblies or modify existing CATIA assemblies or components, you must have CATIA installed where Briefcase Browser can access it.
- To customize Briefcase Browser, you must have Eclipse software with version 3.8 of the Eclipse RCP installed.

See the Hardware and Software Certifications knowledge base article on Support Center for the latest information about supported software versions.

Enable Briefcase Browser

If you receive an unmanaged site Briefcase configuration file from your Teamcenter manufacturer (OEM) or supplier, you must load it to set the proper site attributes before you use Briefcase Browser.

Configure Briefcase Browser

You can change your Briefcase configuration, when required, from within the Briefcase Browser interface.

To customize your Briefcase Browser, copy *CustomDatasetMappings* to the current configuration.

Start Briefcase Browser

Start the application as you do any application on your system. No password or user ID is required.

Basic tasks in Briefcase Browser

Use Briefcase Browser to do the following basic tasks:

- Create a Briefcase file from a native CAD assembly.
- Attach non-CAD files such as Microsoft Word or JT to any modifiable parts from the CAD assembly while creating a Briefcase file.
- Open a Briefcase file and launch the CAD application to update local supplier-owned assemblies or components.
- Open a CAD assembly, in the associated CAD application, modify and save the assembly, synchronize the CAD assembly data, and save the Briefcase file.

For NX data, if you have autobaseline turned on in your **CustomMappings.xml** configuration file, Briefcase Browser creates baseline revisions. It also assigns a release status you can select. The release status is also defined in the **CustomMappings.xml** configuration file.

- Launch a JT viewer and load an assembly for viewing.
- Launch a non-CAD file for viewing.
- Synchronize a Briefcase file with components updated or added to an assembly in your CAD application.

Note:

To add an object to a CAD assembly in NX, you must choose **Assemblies → Add component**. If you copy and paste the object, Briefcase Browser does not recognize the relationship during synchronization and the object does not appear in the updated Briefcase file.

Basic concepts for using Briefcase Browser

Using Briefcase Browser at unmanaged sites

Briefcase Browser requires a site configuration file that is supplied by a site that manages product data in Teamcenter, normally an original equipment manufacturer (OEM) site. Sites that manage product data in a file system outside of Teamcenter are considered unmanaged sites. Briefcase Browser can load Teamcenter Briefcase files that contain data intended for unmanaged sites and allows write permissions to the datasets that the unmanaged site owns or have been checked out to the unmanaged site. Therefore, the site ID must be obtained from a configuration file supplied to the unmanaged site to maintain write control. This is a read-only preference.

If your site has custom attributes, the configuration file can contain the user attribute mapping file that Briefcase Browser uses to map the attribute to a specified object in the TC XML file. Also, the schema file preference must be set to the correct schema to allow Briefcase Browser to correctly load and display the structure. This can also be supplied in the configuration file that the manages site supplies.

Note:

The uniform resource identifiers (URIs) that appear in the headers of PLM XML and TC XML files serve as namespace names, which are unique identifiers for an XML vocabulary. Although they are URIs, they are not used to identify and retrieve Web addresses.

Teamcenter supports both revision and occurrence (unit number and date) effectivity. However, Briefcase Browser supports only revision effectivity. Therefore, if a Briefcase file for an unmanaged site has assemblies with occurrence effectivity, the unconfigured occurrences are included in the file. Briefcase Browser supports precise, imprecise, and hybrid assemblies.


When you set the working directory in Briefcase Browser to a directory that contains existing structure files, Briefcase Browser overwrites any OEM owned parts or assemblies in the directory but maintains any unmanaged site owned parts or assemblies. You can then synchronize the Briefcase file to the working directory.

Briefcase Browser reads the XML configuration files in the **bbworkspace/configurations** directory. Each configuration has a separate directory that contains the **site-id.properties** file as a minimum. It may also contain any of the additional configuration files described in Briefcase Browser site configuration files.

Caution:

You cannot attach the same non-CAD dataset file under two different locally owned objects in Briefcase Browser. To accomplish this you must rename the file prior to attaching it to the second object.

How to compare Briefcase files

You can use Briefcase Browser to compare two existing Briefcase files to determine the changes between the two. For example, if the **BCZ_X_01_03_2012.bcz** file is open in the **Existing Structure** tab, click the **Compare briefcase to another briefcase** button , and select the **BCZ_Y_02_04_2012.bcz** file and the following occurs:

- The **Proposed Structure** tab opens in the structure view and displays the **BCZ_Y_02_04_2012.bcz** file contents. This contents appears the same as if it was opened in the **Existing Structure** tab.
- The **Red Line Structure** tab opens in the structure view and displays the differences between the **BCZ_X_01_03_2012.bcz** and the **BCZ_Y_02_04_2012.bcz** file. This tab displays removed, added, and changed objects in different text colors. The color for removals, additions, and changes is set in the preferences dialog box.

Briefcase comparison preferences default colors

Additions	Green
Removals	Red
Changes	Blue

- If the **BCZ_X_01_03_2012.bcz** file has a **C1** component and the **BCZ_Y_02_04_2012.bcz** file does not, the **C1** component is considered removed and displays in the text color set for removed objects (red by default) in the **Red Line Structure** tab.
- If the **BCZ_X_01_03_2012.bcz** file does not have a **C2** component and the **BCZ_Y_02_04_2012.bcz** file does, the component is considered added and displays in the text color for added objects (green by default) in the **Red Line Structure** tab.
- If both Briefcase files contain a **C3** component, but the attributes of the component are different, the component is considered changed and displays in the text color for changed objects (blue by default) in the **Red Line Structure** tab. If both files contain the component and the attributes are the same, the component appears in black text.
- If both Briefcase files contain a **C3** component, but the datasets of the component are not the same (for example, the component also contains non-CAD datasets), the component is considered changed.

The **Red Line Structure** tab shows the union of all components in the compared Briefcase files. If a Briefcase file is compared to itself all three tabs contain identical views.

Be aware that Briefcase files generated at an unmanaged supplier site contain stub parts for all managed site owned parts (referenced parts). An OEM site generated Briefcase file contains the full objects. Comparing an OEM Briefcase file to a supplier site Briefcase Browser generated file that contains the same OEM site owned parts results in an incomplete structure for the stubbed objects in the **Red Line Structure** tab.

Note:

If a source Briefcase file contains NX data that has additional datasets or forms, this data is shown as changes in the **Proposed Structure** tab. This is because in other CAD applications the additional datasets are not generated when the CAD data is saved.

How autobaseline (auto_baseline) works for NX data

Briefcase Browser provides an autobaseline feature. This feature supports the baseline functionality of Teamcenter. If all criteria are met when after you have modified an assembly, Briefcase Browser automatically creates or updates an objects revision. This revision becomes the baseline when the Briefcase Browser file is imported into a Teamcenter site. The autobaseline feature is controlled by the **CustomMappings.xml** file.

The primary criteria for autobaseline of a part are:

- The part must have been saved in a Briefcase file.

Note:

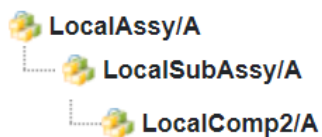
When you receive a Briefcase file created by a managed site, for example an OEM site, that contains one or more parts or an assembly that has ownership transferred to your site, this criterion has not yet been met. You must open and save the Briefcase file in Briefcase Browser at least once before the part is considered saved in a Briefcase file.

- The part that you have modified must be locally owned (supplier part).

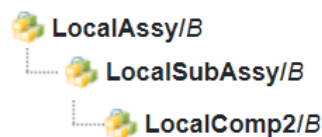
Briefcase Browser creates a baseline revision for parts and the assemblies containing the revised parts if the assembly is also locally owned. The autobaseline continues up the family tree (child to parent to parent's parent) until an assembly that is not locally owned is encountered or the top assembly is reached.

The following examples illustrate the autobaseline feature:

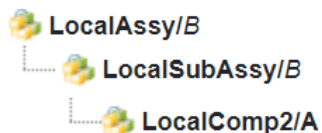
1. In the **LocalAssy/A** assembly structure, you revise the **LocalComp2/A** part that is a locally owned part.



All three items become revision **B** because no remote (OEM owned) part was encountered.

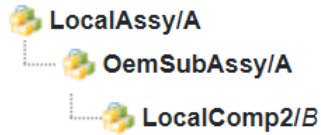


2. This time in the **LocalAssy/A** assembly structure, you revise **LocalSubAssy/A** that is a locally owned part.



In this case, the **LocalComp2/A** item is not revised because it is a child to the revised item.

- This **LocalAssy/A** assembly structure contains a remote OEM owned item and you revise **LocalComp2/A** that is a locally owned child part to the OEM owned item.



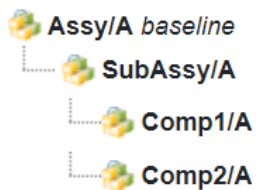
Only the **LocalComp2/A** item is revised because the parent OEM owned item cannot be revised. This prevents the revision of the parent objects.

Briefcase Browser creates a baseline for items in a Briefcase file that are locally owned the first the file is saved from Briefcase Browser. Therefore, the following applies for Briefcase files sent from a Teamcenter site:

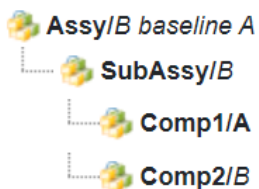
- You receive an entire assembly (**Assy/A** item) created at the OEM site with ownership transfer to your site. You revise a drawing for a component (**Comp1/A**) in your CAD application.



- You synchronize the revised assembly (**Assy/A**) in the Briefcase file and save it. This creates a baseline item (**Assy/A**) in your Briefcase file.



- You subsequently create a new component drawing in your CAD application (**Comp2/A**) and synchronize it in the Briefcase file. This creates a new revision of the assembly (**Assy/B**). However, the new drawing is not listed in the dataset view for the component because the assembly is a baseline.



4. You save the assembly. Because a baseline was created when the original revision was saved, this generates an error in Briefcase Browser.

NX CAD complete Briefcase file requirements

If you want to enforce CAD complete assembly requirements at your site, set the **BB_CAD_VALIDATION_CHECK** environment variable to **true** on the host running Briefcase Browser. When this variable is set to **true**, you can export only CAD complete assemblies to unmanaged sites. The following requirements must be satisfied before an assembly is CAD complete:

- Every node must be associated to a **UGMASTER** dataset.
- The structure in Teamcenter must be synchronized with the CAD structure.
- To verify that an assembly is CAD complete, the following conditions must be satisfied in the TC XML file that you want to export in a Briefcase file:
 - The number of **UGMASTER** elements is equal to the number of **ItemRevision** elements.
 - The number of **BVR** elements is equal to the number of **BVRSyncInfo** elements.
 - At any BVR level, the timestamp of the BVR (**struct_last_mod_date** attribute) must match the timestamp of the **BVRSyncInfo** form (**last_struct_mod** attribute). You can use the **BRIEFCASE_export_CAD_incomplete** preference to export incomplete CAD structures. However, support for incomplete CAD structure export is limited.

NX part requirements

CAD assemblies or parts that are opened from NX into Briefcase Browser must meet the following file naming conventions to allow Briefcase Browser to save them properly to a Briefcase file:

The dataset file name for a CAD part must be of the form *part-name_item-id_rev-id.prt*. For example, if the CAD part has the name **front_panel** and is identified as **00009** and it is revision **A**, the dataset file name must be **front_panel_00009_A.prt**. If you have not supplied the following attributes for the NX part, Briefcase Browser infers these from the file name because they are mandatory in Teamcenter:

- The **DB_PART_NAME** attribute, for example, **front_panel**.
- The **DB_PART_NO** attribute that matches the *item-id* portion of the file name, in this case, **00009**.
- The **DB_PART_REV** attribute that matches the *rev-id* portion of the file name, in this case, **A**.

Any special characters in the required attributes are converted to underscore characters (**_**) to ensure they are valid in Teamcenter. For example, if the part has a part file name has a value of **bulb t#1**, the part number and the part revision is **A**. Briefcase Browser converts the file name to **bulb_t_1_A.prt**.

Caution:

In Microsoft Windows, the vertical bar (|) and the asterisk (*) characters are invalid in file names. Therefore, the item ID and the part name values cannot contain either of these characters.

NX drawing requirements

NX CAD drawings are created using a base model concept, that is, they are always associated with a unique CAD Master file. The dataset file name for a drawing requires a format similar to CAD Part, *item-id_rev-id_s_dwg.prt* or *item-id_rev-id_m_dwg.prt*. Drawings require the same attributes as a CAD part.

Briefcase Browser reads essential attributes from drawings itself, if already defined.

If essential attributes are not defined in drawings then Briefcase Browser reads them from its only child which is a CAD Master file.

Note:

Non-CAD files following the described naming convention and with extensions defined in *CustomDatasetMappings.xml* are attached automatically while opening a CAD assembly and performing synchronization.

For example, *00009_A word.doc* is automatically added to a *00009_A part*. However, *00009_A text.txt* is not added to that part as *.txt* is not listed in the default *CustomDatasetMappings.xml*.

Ownership transfer concepts

In Briefcase Browser you can mark local (supplier) parts for transferring the ownership to the target site from the **Existing Structure** view and the **Ownership Transfer** dialog box. The ownership of parts are transferred to the target site only after the Briefcase is saved. Once the Briefcase is saved, the parts are no longer owned by the supplier.



When a part is marked for ownership transfer in the **Existing Structure** view, it is listed in the **Ownership Transfer** view. If none of the parts are marked for ownership transfer or if no assembly is selected in the **Existing Structure** view, the **Ownership Transfer** view is empty.


You can also select multiple parts for ownership transfer from the **Existing Structure** view.


Note:

When a single part is selected, the context menu shows either **Mark for Ownership Transfer** or **Unmark Ownership Transfer** depending on the current status of the selected part.

When multiple parts are selected, the context menu shows both options, **Mark for Ownership Transfer** and **Unmark Ownership Transfer**, irrespective of the selection.

Once a part is marked for ownership transfer, the icon changes from  to .

You can unmark parts from the **Existing Structure** view or from the **Ownership Transfer** view using the context menu **Unmark Ownership Transfer**. To clear all selections, click  from the **Ownership Transfer** view.

You can also mark/unmark parts for ownership transfer from the **Ownership Transfer** dialog box. This dialog box can be opened by clicking **Tools**→**Transfer Ownership** or by selecting  **Ownership Transfer** from the toolbar button.


The display of the parts listed in the **Ownership Transfer** dialog box depends on what is selected in the **Existing Structure** view. If no parts are selected in the **Existing Structure** view, all the parts are listed. If a sub-assembly is selected, all the local parts of the sub-assembly are listed.

If a part appears multiple times in the **Existing Structure** view under different sub assemblies, it is listed only once.

The following fields in the **Ownership Transfer** dialog box corresponds to various actions that can be performed from the user interface:

Function	Description
Mark / Unmark	<p>The first column (Transfer) shows the status of each part as marked or unmarked. If the check box is selected, the part has been marked for ownership transfer.</p> <p>To transfer the ownership of parts, you can select or clear the check box against the relevant part. For bulk selecting or clearing the parts in the list, select or clear the check box against the column Transfer, as appropriate.</p>
Sort	You can sort columns using column headers.
Filter	<p>To filter specific parts, enter filter criteria in the box below the column headers and tab out from the columns to start filtering data. For the first column, you can filter by selecting Marked or Unmarked from the check box in the column header.</p> <p>Clear any applied filter by clicking the filter icon.</p>
Find	Press Ctrl + F to find a specific part.
Save to Excel	Press Ctrl + E to export any row to Microsoft Excel.
Print	Press Ctrl + P to print the details of a specific part.
Freeze / Unfreeze Columns	<p>Press Ctrl + Shift + F to freeze a column or a row.</p> <p>Press Ctrl + Shift + U to unfreeze a column or a row.</p>
Configure Columns	Right click the column header or filter row to open a context menu that allows you to:

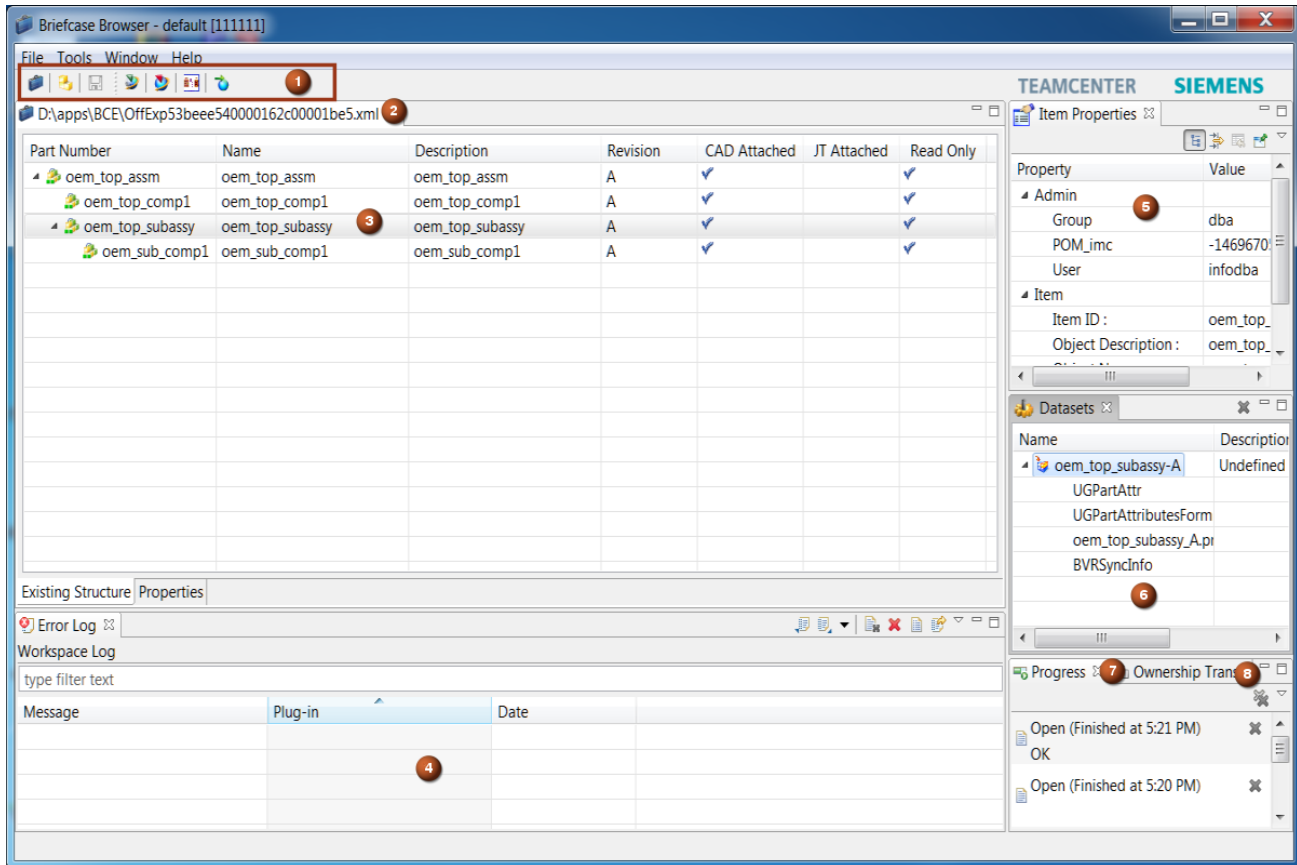
Function	Description
	<ul style="list-style-type: none"> • Hide column: Allows you to hide a specific column. • Show all columns: Allows you to display all columns. • Choose columns: Opens a dialog box that allows you to add or remove any column from a view or change the sequence of the columns displayed. • Clear all filters: Allows you to clear any filters that you may have applied earlier.

The ownership of the parts is transferred only after saving the Briefcase. The local parts whose ownership is now transferred are now read-only as they are now owned by target site. These parts are indicated by the icon .

Briefcase Browser application

Briefcase Browser user interface

Briefcase Browser is an Eclipse-based Java application and that uses the look and feel of the Teamcenter applications user interface (UI), which is composed of perspectives, views, and editors. A *perspective* is an arrangement of views. A *view* is a tabbed window within the UI that provides a view of data. An *editor* is a window that allows you to edit source files. You can rearrange the user interface in any configuration by dragging and dropping views and editors. The example provided is a common perspective of the interface. Depending on your site's settings, Briefcase Browser may display with different colors and other visual differences.



- | | | |
|---|---------------------------|--|
| 1 | Briefcase Browser toolbar | Provides buttons for quick access to the most commonly used Briefcase Browser menu commands. |
| 2 | File location | Provides the path and XML file name for the Briefcase content currently displayed in the structure view. |
| 3 | Structure view | <p>Contains the Existing Structure tab that shows the currently loaded assembly and allows you to navigate the assembly structure. An Existing Structure tab opens for each file you load. The path and file name of the each assembly loaded into an Existing Structure tab is shown on the tab at the top of the view. You switch between structures using the top tabs.</p> <p>If you are comparing two Briefcase files, it contains the Proposed Structure and Red Line Structure tabs.</p> <p>The structure view also contains the Controls/Properties tab that displays the working directory for the currently selected structure tab and schema used to process the structure.</p> |
| 4 | Error Log view | Displays operational message status and errors messages. |

5	Item Properties view	Displays the properties of the item selected in the Existing Structure tab.
6	Data Sets view	Displays the datasets associated with the selected item in the Existing Structure tab and allows you to open the dataset in the associated application.
7	Progress view	Lets you monitor progress messages and units of completed work for selected long-running jobs (those lasting more than a second) such as opening a Briefcase file.
8	Ownership Transfer view	Displays parts marked for ownership transfer. The view also allows you to unmark parts marked for ownership transfer.

The **Datasets Properties** and **Changes** views may also be displayed.

Briefcase Browser menus

Use the **File** menu commands to manage Briefcase files.

Command	Purpose
Open Briefcase	Displays the dialog box that allows you to navigate to and select the desired Briefcase file that you want to manage.
Open CAD Assembly	Displays the dialog box that allows you to navigate to and select the desired CAD file that you want to manage.
Save Briefcase	Saves the currently loaded Briefcase file in the working directory.
Export to CSV	Exports the Briefcase file contents to a text file with comma-delimited fields suitable for opening in a spreadsheet application.
Close Briefcase	Unloads the current Briefcase file from Briefcase Browser.
Exit	Exits Briefcase Browser.

Use the **Tools** menu commands to start associated tools and access troubleshooting tools.












Command	Purpose
Launch JT	Opens the selected object in the JT viewer. A JT dataset must be associated with the object.
Launch NX	Launches NX and loads the selected part or assembly and its children.
View in CATIA	Launches CATIA and loads the selected part or assembly and its children.
Compare Briefcase	Allows you to select another Briefcase file and show the differences between the currently existing structure and the selected Briefcase file structure.
Synchronize	Refreshes the existing structure in the structure editor with the CAD tool changes.
Debug	<p>The Debug command contains a submenu of commands that provide the following:</p> <p>Trace Turns on the trace debug option that includes additional information in the log file.</p> <p>Archive Log File Opens a dialog box that allows you to save the contents of the current log file in an archive (.zip) file format. The compressed file saves disk space and allows easy transfer of log file information, such as through e-mail.</p>
Ownership Transfer	<p>Allows you to open Ownership Transfer dialog box to mark parts for ownership transfer.</p> <p>Ownership Transfer is displayed only when you open a CAD assembly.</p>
Add Dataset	<p>Allows you to add non-CAD files such as Microsoft Word or JT to the CAD assembly.</p> <p>Add Dataset is displayed only when you open a CAD assembly.</p>

Use the **Window** menu commands to apply views to the perspective and access preference settings.

Command	Purpose
Show View	Opens a dialog box that allows you to select the desired views.
Preferences	Opens a dialog box that you can use to view and set preferences.
Reset Perspective...	Opens a dialog box that allows you to reset the current Briefcase perspective to its default view.

Briefcase Browser buttons

Briefcase Browser contains the following buttons.








Button	Function	Description
	Open Briefcase	Opens the navigation dialog box in which you select a Briefcase file to load.
	Open CAD assembly	Opens a CAD assembly file. This creates the required TC XML data for the assembly to make a valid Briefcase file.
	Save	Allows you to save the Briefcase file.
	Open Ownership Transfer dialog box	Allows you to open Ownership Transfer dialog box to mark parts for ownership transfer.
	Add Dataset	Allows you to add non-CAD files such as Microsoft Word or JT to the CAD assembly.
	View JT model	Launches the JT viewer and loads the currently selected JT assembly.
	View CAD model in NX	Launches NX and loads the currently selected NX assembly or component.
	View CAD model in CATIA	Launches CATIA and loads the currently selected CATIA assembly or component.
	Compare Briefcase files	Compares the currently loaded Briefcase file to another Briefcase file that you select and displays the differences in a new tab.
	Synchronize	Synchronizes the Briefcase file with changes made in NX.
	Synchronize Briefcase	Synchronizes the Briefcase file with changes made in CATIA.










Briefcase Browser views

Most Briefcase Browser views can be customized and may be stacked to provide tab access to the view. The structure view tabs cannot be customized.

Tab	Description
Existing Structure	Displays a view of the currently loaded Briefcase file assembly structure, consisting of rows of objects and columns of attributes.
Controls/Properties	Displays the working directory for the currently loaded Briefcase file and the schema that it is based on.
Proposed Structure	Displays a view of a Briefcase file assembly structure that is being compared to the Existing Structure tab assembly structure.
Red Line Structure	Displays a view of a the differences between the Existing Structure tab assembly structure and the Proposed Structure tab assembly structure.

Briefcase Browser symbols

Symbol	Name	Description
	Item revision	Indicates the object is a Teamcenter item revision. These are the objects that can be exported to an unmanaged site. They contain the related objects, such as datasets, and can contain other related item revisions. Item revisions that have small green boxes below them are owned by a remote site, such as the OEM or another supplier. They may also contain a lock symbol with a checked-out symbol ( .
	UGMaster	Indicates the object is an NX model (UGMaster dataset).
	UGPART	Indicates the object is an NX model (UGPART dataset).
	Dataset	Indicates a dataset object. These are file systems files that can be used by specific applications.
	Stub	Indicates an object exists and some metadata about the object is present but the related datasets or other objects are not present. Stubs are used mainly for performance by making the file size smaller but still maintaining the integrity of the structure.
	Attached CAD or JT	Indicates that the object has a related CAD or JT file attached.

Symbol	Name	Description
	Properties	Indicates a properties view. These views display object data, such as name, creation date, ownership, and description for the selected object. These views also provide Show Categories , Show Advanced Properties , and Restore Default Value buttons for use as appropriate.
	Progress	Indicates the Progress view.
	Mark for Ownership Transfer	Indicates that a part can be marked for ownership transfer.
	Unmark Ownership Transfer	Indicates that you can unmark a part that was marked for ownership transfer.
	CATProduct	Indicates the object is a CATIA product dataset.
	CATPart	Indicates the object is a CATIA part dataset.
	CATDrawing	Indicates the object is a CATIA drawing dataset.
	CATCache	Indicates the object is a CATIA graphical representation (CGR) dataset.
	CATShape	Indicates the object is a CATIA shape dataset.

2. Install Briefcase Browser

Use this procedure to install Briefcase Browser. Doing so installs Briefcase Browser with the plugin for NX, for other applications such as CATIA, or for use with JT files. Only one plugin can be installed at a time.

1. Acquire the Briefcase Browser and appropriate plugin kits and extract them locally.

The kits can be downloaded from Support Center.

2. Ensure you have **the required Java Runtime Environment (JRE)** installed and that your **JAVA_HOME** environment variable is set to use that version
3. If you are using the plugin for NX, perform the following steps:
 - a. Ensure the value of the **UGII_ROOT_DIR** environment variable is set to the location of the root directory for the NX installation that you use with Briefcase Browser.
 - b. Add the **UGII_ROOT_DIR** and **UGII_BASE_DIR** environment variables to the start of the **PATH** environment variable value.
 - c. Open a command window and run the following batch file:

```
bb_install_path\BB\BB_version\ConfigureNXplugins.bat
```

The NX instance and Java virtual machine used by Briefcase Browser must be 64 bit.

If you have multiple versions of NX installed on your host, the version that Briefcase Browser uses is determined by the NX version instance that is in the Windows registry.

4. Place the Briefcase Browser archive file (**bb_wntx64.zip**) in the directory in which you want to install it. Unzip the file.
5. If you are using a non-NX CAD program plugin (such as the plugin for CATIA), remove the following file from your system.

```
bb_install_path\BB\BB_version\plugins\com.teamcenter.bce.cad.nx.version_and_date.jar
```

Refer to the instructions provided with the **BBpC** plug-in in Support Center for information about differences in the installation process.

6. If you are using the Briefcase Browser JT plugin, open a command window and run the following batch file:

```
bb_install_path\BB\BB_version\ConfigureBBJTplugins.bat
```

7. *TCXML.xsd* is a file Briefcase Browser uses to load, display, create, preview, and compare Briefcase files. This file is typically supplied by the managed (OEM) site to the supplier (unmanaged) site. Copy *TCXML.xsd* to the following directory.

```
bb_install_path\BB\BB_version\bbworkspace\configurations
```

8. **Start the Briefcase Browser application.** You must accept the displayed agreement the first time you start the browser.

If Briefcase Browser fails to start, check the log files in the following directory:

```
bb_install_path\BB\BB_version\workspace\.metadata
```

9. Set the Briefcase Browser preferences as described in **Briefcase Browser preferences**.
10. Identify the site with which you are sharing data as described in **Configure site identification**.

3. Configuring Briefcase Browser

Configure site identification

Once Briefcase Browser is installed, use the following steps to configure Briefcase Browser to exchange data with a particular Teamcenter (OEM) site. After following these steps, the configuration will appear in the **Configuration Name** list on the **Preferences** dialog box.

1. Start Briefcase Browser and choose **Window**→**Preferences**.
2. Under **Configuration Name**, click **New**.
3. Enter a name identifying the site configuration, the site ID provided by the Teamcenter site, and click **OK**.

A new directory is created to hold the site's configuration files. For example:

```
bb_install_path\BB\BB_version\bbworkspace\configurations\new_site
```

4. Close Briefcase Browser.
5. Navigate to the following directory.

```
bb_install_path\BB\BB_version\example\bbworkspace\configurations\example
```

6. Excluding the *site-id.properties* file, copy the rest of the *example* directory's contents to the directory you created at the start of this procedure.
7. Open the following file in a text editor.

```
bb_install_path\BB\BB_version\bbworkspace\configurations\new_site\CustomMappings.xml
```

8. In *CustomMappings.xml*, update the values of **oem_name** and **site_id** to the values assigned to the Teamcenter (OEM) site from which you are receiving data. For example:

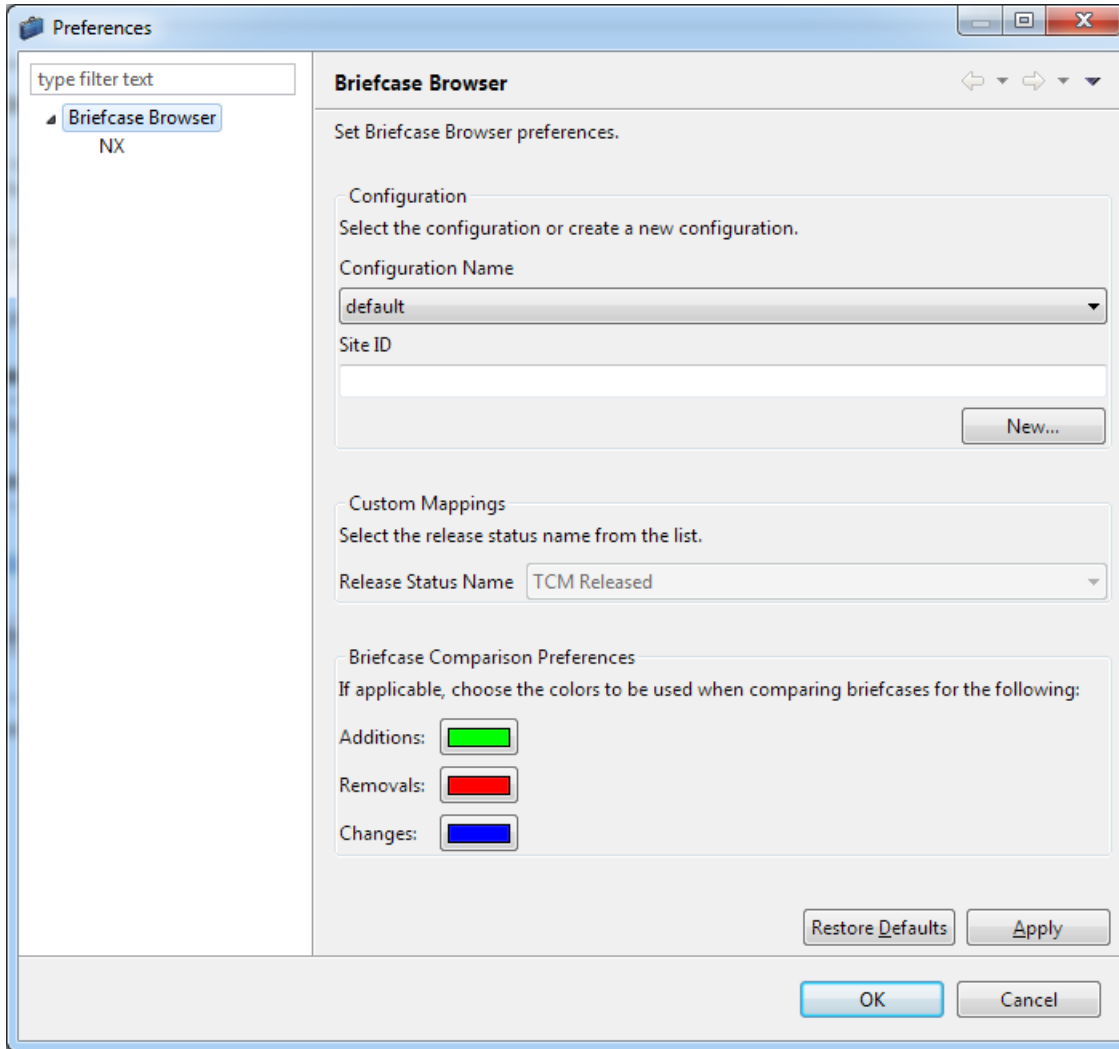
```
<oem name="OEM Name" site_id="2468" ...
```

See **Briefcase Browser site configuration files** for more information about the configuration files in the *bbworkspace\configurations* directory.

9. Save the file. The configuration appears in the **Configuration Name** list on the **Preferences** dialog box the next time you start Briefcase Browser.

Briefcase Browser preferences

After you install and start Briefcase Browser, choose the **Windows→Preferences** command to configure or view the following settings.



Configuration

Displays the configuration information for the current Briefcase Browser session.

Click **New** to open the **New Configuration** dialog box. Type a configuration name and site ID value to create a new directory under the **bbworkspace\configurations** directory that contains a **site-id.properties** file.

Configuration Name

Displays the list of available configurations. This list is determined by the configuration directories that are present under the **<ANY>\BB\version\bbworkspace\configurations** directory.

The value you choose determines the supplier site configuration for the current Briefcase Browser session.

Site ID

Displays a read-only value from the **site-id.properties** file for the selected configuration. It identifies the site for write permission purposes.

Custom Mappings

Displays the list or release status names from the **CustomMappings.xml** file for the current configuration.

Release Status Name

This is a read-only value list from the **CustomMappings.xml** file for the current configuration. This value is used to set the release status for any new CAD parts or assemblies that Briefcase Browser creates when saving a Briefcase file.

Briefcase Comparison Preferences

These preferences set the text colors used in the **Red Line Structure** view to show differences between Briefcase files.

Startup configuration

Configure Briefcase Browser to work optimally at your site as follows.

Manage JVM memory use

Running the Briefcase Browser executable uses the Java virtual memory (JVM) properties set in the **BriefcaseBrowser.ini** file. The default value for the 64-bit application is **-Xmx2G**, specifying a maximum heap size of 2GB.

Modify the settings in this file to change the default JVM properties or add additional JVM properties, such as the initial (minimum) heap size (**-Xms**) property.

Restart Briefcase Browser for changes in the **BriefcaseBrowser.ini** file to take effect.

You can temporarily override the default settings for the current Briefcase Browser session by starting the application from a command prompt. You must have the **UGII_ROOT_DIR** and **UGII_BASE_DIR** environment variables set and in the path. For example, to set the initial heap size to 512 MB and the maximum heap size to 1 GB, enter the following command from the directory containing the **BriefcaseBrowser.exe** file:

```
BriefcaseBrowser.exe -vmargs -Xms512m -Xmx1G
```

You can set the environment variables and **PATH** variable in a batch file, along with the executable and the associated Java arguments, to ensure that the application starts properly.

For more information about JVM settings, see the Oracle *Command Line Reference* documentation available at <https://docs.oracle.com> and <https://developer.ibm.com>.

Optimize Briefcase Browser performance

The Java heap size affects the stability and performance of Briefcase Browser and must be set according to the size of the Briefcase files the application must open. For best results, set the Java heap size to run Briefcase Browser with 40 percent minimum and 70 percent maximum heap usage.

For additional information about setting appropriate heap size values, see the *IBM Java Troubleshooting* documentation:

Set the Briefcase Browser locale

Ensure the **Format** box in the Windows **Region and Language** control panel dialog box is set to the same locale as your Briefcase Browser application or to US English.

Use Briefcase Browser with CAD assemblies

To open assemblies that are created in NX 11 or later, include the path to the **nxbin** directory in the **path** environment variable, for example:

```
Set path= =%UGII_BASE_DIR%;%UGII_BASE_DIR%\nxbin;%PATH%;
```

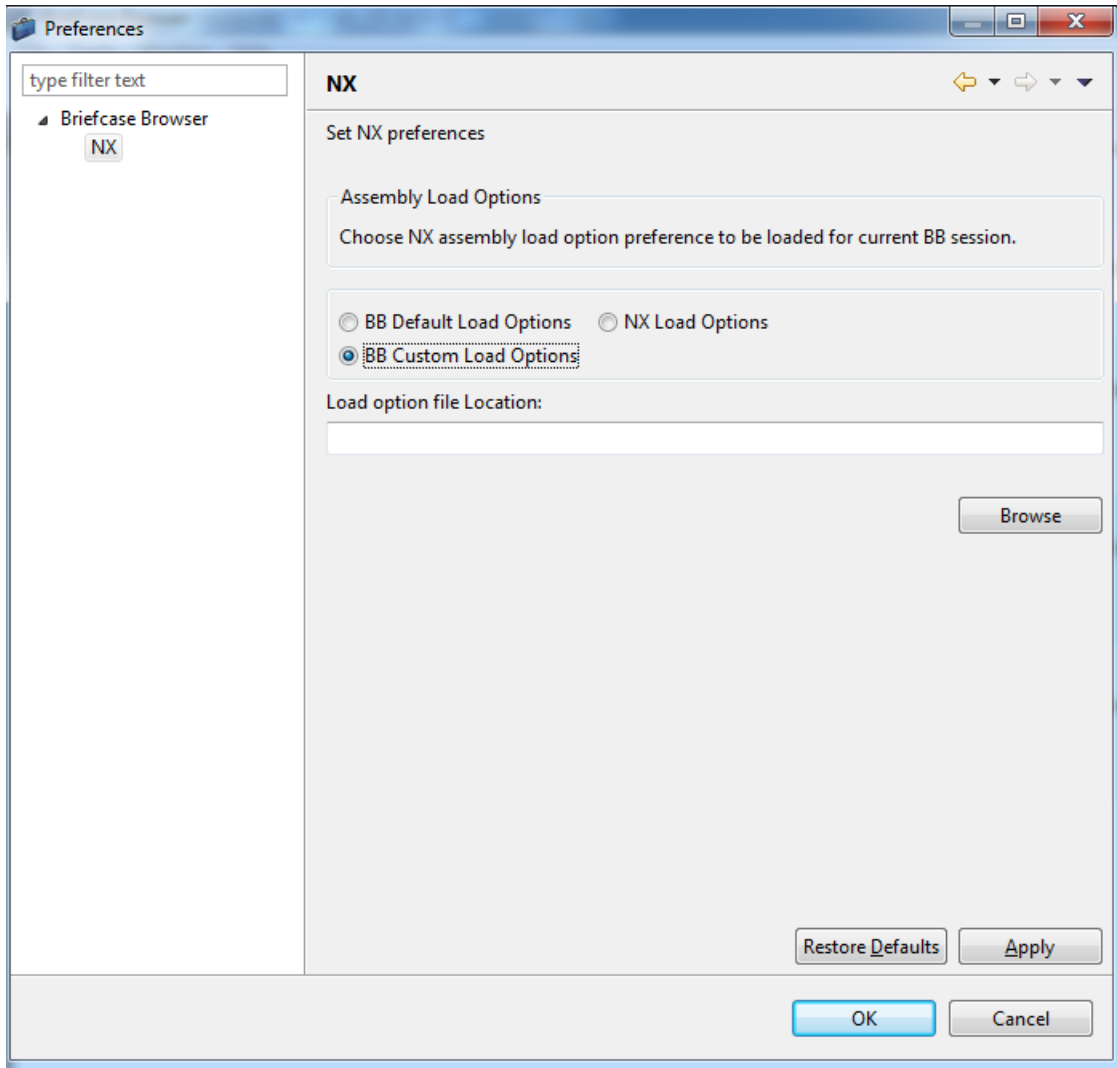
Caution:

Briefcase Browser handles incomplete CAD assemblies by default. To prevent handling of incomplete CAD assemblies and to generate error messages instead, set the **BB_CAD_VALIDATION_CHECK** environment variable to **TRUE**. If **BB_CAD_VALIDATION_CHECK** is not defined or is set to **FALSE**, Briefcase Browser does not generate error messages for missing dependents in incomplete assemblies.

Assembly load option preferences

Using Briefcase Browser, you can set and manage the assembly load options required while opening a CAD assembly. You can open a CAD assembly that is saved across different folders by setting up NX Load Options preferences in Briefcase Browser.

After you install and start Briefcase Browser, choose **Windows**→**Preferences** and click **NX** under **Briefcase Browser** to configure or view the NX load option settings.



Assembly Load Options allows you to choose the NX assembly load option preference for the current Briefcase Browser session. You can select one of the following options:

BB Default Load Option

Allows you to select the default load option defined in the Briefcase Browser application.

NX Load Options

Directs Briefcase Browser to read the environment variable values defined for NX load options in the `UGII_LOAD_OPTIONS` file. If the values are not defined in this file, the default native NX load options are considered.

BB Custom Load Options

Resets or overrides the default load options defined in Briefcase Browser or NX using a custom load option file. Select this option, and in the **Load option file Location** field, enter a path or **Browse** to a file with the defined custom load options.

In this manner, you can switch to a different load option without making any changes in the NX files. However, the changes are applicable only for the current session. To load a new assembly load option file, start a new Briefcase Browser session and select a preference.

NX load options

Using **NX Load Options**, you can open an NX CAD assembly in Briefcase Browser spread across different folders.

The load option file is a **.def** file containing load definitions for assembly loading in NX that are used in Briefcase Browser. Based on the **Part Versions – Load** option defined in this file, Briefcase Browser opens the CAD assembly, reads the CAD data, and writes the CAD data, as needed. A sample **.def** file containing the assembly load option details is as follows:

```
load_options.def
1 LoadOptions_SearchPaths: D:\\Siemens\\NX9\\UGII...
2 LoadOptions_LoadComponents: load_all_components
3 LoadOptions_LoadFully: NO
4 LoadOptions_UseLightweightRepresentations: NO
5 LoadOptions_LoadWAVE: NO
6 LoadOptions_LoadWAVEParents: NONE
7 LoadOptions_LoadSubstitution: dont_allow_substitution
8 LoadOptions_LoadLatest: NO
9 LoadOptions_LoadOption: load_from_dir
10 LoadOptions_ManagedModeLoadOption: load_by_revision_rule
11 LoadOptions_LoadFilters: load_no_components
12 LoadOptions_LoadFailOption: dont_abort
13 LoadOptions_ReferenceSets: "As Saved" "Entire Part" "Empty" "Use Model"
14 LoadOptions_ApplyAllLevels: NO
15 LoadOptions_GenerateMissingPFM: YES
16 LoadOptions_BookmarkRefSets: Import
17 LoadOptions_BookmarkPartsLoad: Load_Visible
18 LoadOptions_BookmarkRestoreFullyLoadedState: no
19 LoadOptions_SubsetLoadBehavior: Do_Not_Update
```

You can load a CAD assembly by using **NX Part Versions – Load Options** in one of the three ways:

- **From Folders:** Allows you to set a folder from where you can load a new file or open a file each time. This the **NX Part Versions** default load option.
- **As Saved:** Allows you to set the path to the folder where the file is saved. Once set, you are redirected to that folder each time you open a new file.
- **From Search Folders:** Allows you to load an assembly for which the parts are saved in different folders. This load option file will contain information about all the folders where the assembly part files are saved.

Briefcase Browser site configuration files

Briefcase Browser reads the XML configuration files in the **bbworkspace\configurations** directory. Each configuration has a separate directory that contains the **site-id.properties** file as a minimum.

The **create_briefcase_browser_config_package** utility creates a compressed package file of the configuration files that you can provide to your suppliers. The utility takes the path to the Briefcase Browser installation ZIP file (**-bbDir** argument) and generates a managed (OEM) site ZIP file containing the OEM configuration package.

```
create_briefcase_browser_config_package -u=username -p=password -g=dba  
-bbDir=C:\apps\bb
```

The package name is the OEM site name. It contains the **CustomMappings.xml** file with the OEM site ID set as the target site ID. It also contains the **TCXML.xsd** schema file, generated from the OEM and the OEM configuration file.

site-id.properties

Defines the unmanaged site ID. This value can be any numeric sequence not starting with a zero and is not required to meet Teamcenter site ID requirements. If this file is not present, Briefcase Browser does not allow you to create a Briefcase file. You can create or modify this file manually or use the **Preference** dialog box in Briefcase Browser.

It must also contain the following additional configuration files:

TCXML.xsd

Defines the schema that Briefcase Browser uses to load, display, and create Briefcase files. This file is typically supplied by the managed (OEM) site to the supplier (unmanaged) site. It is available in the **TC_DATA** directory of the Teamcenter installation.

If a **TCXML.xsd** file does not exist in the configuration directory for your site, Briefcase Browser uses the standard Teamcenter schema. **TCXML.xsd** is required in this directory for comparing and previewing Briefcase files.

Note:

The uniform resources identifiers (URIs) that appear in the headers of PLM XML and TC XML files serve as namespace names, are unique identifiers for an XML vocabulary. Although they are URIs, they are not used to identify and retrieve web addresses.

CustomMappings.xml

Defines the following information about the Teamcenter (OEM) site with which you exchange Briefcase files:

- The site name.

- The site ID.
- The Teamcenter version.
- If your site must use the **auto_baseline** (baseline) feature when exchanging updated Briefcase data.
- If the site allows precise or imprecise structures.
- If your site must create all replica objects as stubs (**include_all_objects=false**). When writing reference objects as stubs, Briefcase Browser does not package any corresponding CAD data in the Briefcase package. If this value is set to **true**, Briefcase Browser writes all objects as full objects in the Briefcase file reference replica parts.
- If your site must include full objects for all checked-out parts and locally owned parts (**include_modified_objects_only=false**). If this value is set to **true**, Briefcase Browser writes local parts as full objects. Parts checked out to your site as full objects are also written as full objects if they are modified since the file was last saved, including their parent and grandparent objects. If objects checked out to your site have not been modified, they are written as stub objects and the corresponding part files are not included in the Briefcase package.
- The separator character the site requires between the item ID and revision.
- Custom type mapping to OEM objects.
- Release status values the managed (OEM) site allows you to assign to parts or assemblies that you create in the **release_status_name** elements. Briefcase Browser displays the values that you supply in **release_status_name** elements in the **Release Status Name** list in the **Preferences** dialog box. The value you select in the **Preferences** dialog box is assigned as the release status of any new CAD parts or assemblies you create. The value must match one of the valid values for the Teamcenter release status at the OEM site.
- Custom forms related to item revisions to process when exchanging data, such as business object forms with mass-related properties. When **ir_to_form** is set to **true**, the listed forms are processed. If **ir_to_form** is set to **false**, the forms are ignored. See the **ir_to_form** section in the following sample for examples.

Sample content for this file:

```
<?xml version="1.0" encoding="UTF-8"?>
<custom_mappings xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xsi:noNamespaceSchemaLocation="../bce-core/CustomMappings.xsd">
  <oem name="your_oem_name" site_id="87654321" tc_version="Target-TC-Version"
    auto_baseline="false" generate_validation_xml="false" is_precise="true"
    separator="/" object_name_separator="/" bomview_type_name="view"
    include_modified_objects_only="false" include_all_objects="false"
    extract_to_sub_directory="false" process_reference_briefcases="true">
    <release_status_name>Snapshot</release_status_name>
    <release_status_name>TCM Released</release_status_name>
```

```

    <release_status_name>R2InWork</release_status_name>
</oem>

<ir_to_form enabled="false">
  <form_type>custom_form_type</form_type>
  <relation>custom_relation</relation>
</ir_to_form>

<item_type_mapping custom_type="Item">
  <multi_field_key>
    <attribute>item_id</attribute>
  </multi_field_key>
  <helper_object_map custom_type="ItemRevision"
    ootb_type="ItemRevision"/>
  <helper_object_map custom_type="Item--Master"
    ootb_type="Item--Master"/>
  <helper_object_map custom_type="ItemRevision--Master"
    ootb_type="ItemRevision--Master"/>
</item_type_mapping>

<item_type_mapping custom_type="CAD">
  <multi_field_key>
    <attribute>item_id</attribute>
  </multi_field_key>
  <helper_object_map custom_type="CAD--Revision"
    ootb_type="ItemRevision"/>
  <helper_object_map custom_type="CAD--Master"
    ootb_type="Item--Master"/>
  <helper_object_map custom_type="CAD--Revision--Master"
    ootb_type="ItemRevision--Master"/>
</item_type_mapping>

<item_type_mapping custom_type="B4Item">
<multi_field_key>
  <attribute>item_id</attribute>
</multi_field_key>
<helper_object_map custom_type="B4ItemRevision"
  ootb_type="ItemRevision"/>
<helper_object_map custom_type="B4ItemMaster"
  ootb_type="Item--Master"/>
<helper_object_map custom_type="B4ItemRevisionMaster"
  ootb_type="ItemRevision--Master"/>
/item_type_mapping>

<item_type_mapping custom_type="CommercialPart">
  <multi_field_key>
    <attribute>item_id</attribute>
  </multi_field_key>
  <helper_object_map custom_type="CommercialPart--Revision"
    ootb_type="ItemRevision"/>
  <helper_object_map custom_type="CommercialPart--Master"
    ootb_type="Item--Master"/>
  <helper_object_map custom_type="CommercialPart--Revision--Master"
    ootb_type="ItemRevision--Master"/>
</item_type_mapping>

<item_type_mapping custom_type="Design">
  <multi_field_key>
    <attribute>item_id</attribute>
  </multi_field_key>

```

```
<helper_object_map custom_type="Design--Revision"
  ootb_type="ItemRevision"/>
<helper_object_map custom_type="Design--Master"
  ootb_type="Item--Master"/>
<helper_object_map custom_type="Design--Revision--Master"
  ootb_type="ItemRevision--Master"/>
</item_type_mapping>

<item_type_mapping custom_type="Part">
  <multi_field_key>
    <attribute>item_id</attribute>
  </multi_field_key>
  <helper_object_map custom_type="Part--Revision"
    ootb_type="ItemRevision"/>
  <helper_object_map custom_type="Part--Master"
    ootb_type="Item--Master"/>
  <helper_object_map custom_type="Part--Revision--Master"
    ootb_type="ItemRevision--Master"/>
</item_type_mapping>
</custom_mappings>
```

The **auto_baseline** attribute indicates whether or not your Briefcase Browser provides autobaseline functionality. If this is set to **true**, the baseline feature is enabled. The template file has this value set to **true**. If it is set to **false**, Briefcase Browser does not automatically revision objects. If the attribute is not defined in this file, Briefcase Browser performs automatic revisions as if the attribute was set to **true**.

If the Briefcase file you are exchanging must contain precise assembly structures, set the **is_precise** attribute to **true**. Set this value to **false** when imprecise assembly structures are allowed.

If you intend to add objects to CAD parts in the CAD application, set the **include_all_objects** attribute to **true** to include them when you save the Briefcase file for exporting back to Teamcenter.

You can have any number of release status elements. These become the selection list for **Release Status** in your Briefcase Browser **Preferences** dialog box.

You map custom CAD parts types to OEM types by assigning a custom **Item** type to the items in the TC XML data created for your CAD part. You define the subtype of the **Item** type as a helper object, for example:

```
<helper_object_map custom_type="CADPart" ootb_type="Item"/>
```

This causes the TC XML data generated for custom **CADPart** supplier owned parts to be created as **Item** objects at the OEM site.

Note:

The custom item type must be defined in the schema (**TCXML.xsd**) file used by Briefcase Browser.

You can have multiple custom types defined in this file. Briefcase Browser locates the matching custom type in the file and maps the file to the defined OEM object. If a custom type part is not found in the **CustomMappings.xml** file, the first custom type defined is used. If there are no custom types defined, Briefcase Browser maps the part to the standard Teamcenter type.

CustomDatasetMappings.xml

This XML file contains valid dataset extensions and relation types supported for Non-CAD files. Each dataset extension specifies whether it is a primary (master), dataset name, **ref_names**, and relation to be used while generating TC XML. Each relation type specifies the display relation for the **Add Dataset** dialog box and the actual relation to be used for generating TC XML. If this file is not found, an OOTB file is used. You can add additional non-CAD types to this file.

Caution:

If your system has CAD dataset types other than the primary dataset, and the dataset type follows the model file naming convention, you must add an entry representing the dataset. Add the entry with the **is_master** attribute set to **False**, for example:

```
<cad_data_set_mapping is_master="False" dataset_type="UGPART"
ref_names="UGPART" relation="" />
```

This prevents an error from occurring when you open or synchronize an updated CAD assembly in Briefcase Browser.

```
<?xml version="1.0" encoding="utf-8"?>

<!-- XML file containing valid dataset extensions and relation types supported for
Non-CAD files.
Each dataset extension specifies if it is a master, dataset name, ref_names and
relation to be
used while generating TCXML. Each relation type specifies the display relation for
the Add Dataset
dialog and the actual relation to be used for generating
TCXML. -->
<custom_data_set_mapping xmlns:xs="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">

<data_set_mapping extension="prt">
<cad_data_set_mapping is_master="True" dataset_type="UGMASTER" ref_names="UGPART"
relation="" />
<cad_data_set_mapping dataset_type="UGPART" ref_names="UGPART" relation="" />

</data_set_mapping>
<data_set_mapping extension="doc">
<cad_data_set_mapping dataset_type="MSWord" ref_names="word"
relation="IMAN_reference" />
</data_set_mapping>
<data_set_mapping extension="docx">
<cad_data_set_mapping dataset_type="MSWord" ref_names="word"
relation="" />
</data_set_mapping>
<data_set_mapping extension="xls">
<cad_data_set_mapping dataset_type="MSExcel" ref_names="excel"
relation="" />
</data_set_mapping>
```

```

        <data_set_mapping extension="jpg">
        <cad_data_set_mapping dataset_type="JPEG" ref_names="JPEG_Reference"
        relation="" />
</data_set_mapping>
        <data_set_mapping extension="jt">
        <cad_data_set_mapping dataset_type="DirectModel" ref_names="JTPART"
        relation="IMAN_Rendering" />
</data_set_mapping>
        <relation_type actual_relation="IMAN_specification"
        display_relation="specification" />
        <relation_type actual_relation="IMAN_Rendering"
        display_relation="rendering" />
        <relation_type actual_relation="IMAN_manifestation"
        display_relation="manifestation" />
        <relation_type actual_relation="IMAN_reference"
        display_relation="reference" />
</custom_data_set_mapping>

```

cad_to_tc_attribute_map.xml

Defines the mapping of user-defined NX attributes to qualified Teamcenter object attributes. The user-defined attributes must be part of the configured TC XML schema (**TCXML.xsd** file). This allows you to define attributes for qualified objects in addition to the required attributes.

Caution:

You can map only one CAD part attribute to one Teamcenter attribute (1-to-1 map). Mapping a CAD part attribute to multiple Teamcenter attributes or a single attribute to multiple item types can corrupt or lost data.

Example:

```

<?xml version="1.0" encoding="UTF-8"?>

<!-- Only one CAD2TC_attribute_mappings that can contain more than one
attribute map. These mappings will hold a list of CAD attributes
that map to teamcenter attribute -->

<CAD2TC_attribute_mappings xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:noNamespaceSchemaLocation="cad_to_tc_attribute_map.xsd">

  <!-- cad_part_attr should be unique for each attribute_mapping -->
  <attribute_mapping cad_part_attr="PART_MATERIAL" tc_attr="nisPartMaterial"
    tc_type="CAD--Revision--Master" />
  <attribute_mapping cad_part_attr="PART_THICKNESS" tc_attr="nisPartThickness"
    tc_type="CAD--Revision--Master" />
  <attribute_mapping cad_part_attr="CALC_WEIGHT" tc_attr="nisCalculationWeight"
    tc_type="CAD--Revision--Master" />
  <attribute_mapping cad_part_attr="CALCULATIVE_COEFFICIENT"
    tc_attr="nisCalculativeCoefficient"
    tc_type="CAD--Revision--Master" />
  <attribute_mapping cad_part_attr="Z_CENTROID" tc_attr="nisGravityZ"
    tc_type="ItemRevision--Master" />
  <attribute_mapping cad_part_attr="Y_CENTROID" tc_attr="nisGravityY"
    tc_type="CAD--Revision--Master" />
  <attribute_mapping cad_part_attr="X_CENTROID" tc_attr="nisGravityX"

```

```

        tc_type="CAD--Revision--Master" />
    </CAD2TC_attribute_mappings>

```

visible-attributes.xml

Defines the attributes that are displayed in Briefcase Browser properties views. By default, Briefcase Browser displays all qualified attributes. If this file is present, Briefcase Browser limits the attributes in the properties views to the attributes defined in this file. The following is sample content for this file:

```

<visible_attributes>

    <group name="Item">
        <attribute ootb_type="Item" name="item_id" />
        <attribute ootb_type="ItemRevision" name="object_name" />
        <attribute ootb_type="ItemRevision"
name="object_description" />
    </group>

    <group name="Admin">
        <attribute ootb_type="POM_imc" name="POM_imc" />
        <attribute ootb_type="Group" name="Group" />
        <attribute ootb_type="User" name="User" />
    </group>

</visible_attributes>

```

attributes_text_locale.xml

Defines the localized values for the language indicated by the name of the directory containing the file. The directory name consists of a two-character locale and two-character country code such as **en_US**. The language directories must be in the **lang** directory in the site's configuration directory.

For example, the following shows the US English (**en_US**) and the Japanese localization (**ja_JP**) directories:



Briefcase Browser reads the TC XML file content and displays the object property names as defined in the file. The properties are database field names that may not be readable by your users. You can use this file to map the database field names to usable localized names.

Your **attributes_text_locale.xml** files must be UTF-8 encoded. They must also contain the following element as the root XML element in the file:

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
```

If the property names are not displayed in your locale language, use a different text editor for UTF-8 encoding.

Following is sample content for this file in the Japanese locale:

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<textsrv filename="attributes_text_locale.xml">

<key id="inbox_type">未信トレイ</key>
<key id="inbox_name_1">実行タスク</key>
<key id="inbox_name_2">追跡タスク</key>
<key id="type_label">タイプ</key>
<key id="object_label">オブジェクト</key>
<key id="property_label">プロパティ</key>
<key id="msg_string">フォルダも存在しない。</key>

<!--generic_shell.cxx-->
<key id="shell_string">ObjectListBox Shell</key>

<!--objectlistbox.cxx-->
<key id="ownerid_string">所有者ID</key>
<key id="date_string">作成日</key>
<key id="cannot_string">読み込み不能</key>
<key id="readOnlyMsg">読み込み専用</key>
<key id="app_encapsulation_label">アプリケーション観約</key>
<!--tool.cxx-->

<!--distributionlist.cxx envelope.cxx-->
<key id="mail_label">メール</key>

<!--form.cxx-->
<key id="form_def_label">フォーム定義ファイル名</key>
<key id="structure_group_label">構造グループ</key>

<!--bomview.cxx-->
<key id="bomview_label">BOMビュー</key>
<key id="product_label">製番</key>
<key id="PSM_label">PSM</key>
<key id="item_id_string">アイテムID</key>
<key id="dataset_id">データセットID</key>
<!--! <MSF> 04-Mar-1994 Workspace column headings - the xxx names are used-->
<!--! for backward compatibility with existing .tc_env files-->
<key id="private_object_string" scope="private">オブジェクト</key>
<key id="private_id_label" scope="private">ID</key>

<!-- Part Object -->
<key id="is_designrequired">デザイン必須観</key>
<key id="make_or_buy">製造/購買</key>
<key id="part_make">製造</key>
<key id="part_buy">購買</key>
.
.
.
</textsrv>
```

Sample files are provided for each of these configuration files in the **example\bbworkspace\configurations\example** directory.

4. Using Briefcase Browser

Starting Briefcase Browser

1. After you install and configure Briefcase Browser, start it by double-clicking the Briefcase Browser program file:

```
bb_install_path\BB\BB_version\BriefcaseBrowser.exe
```

2. Choose **Window**→**Preferences**.
3. Choose the configuration of the site with which you are sharing data. Click **Apply and Close**.

See **Briefcase Browser preferences** for additional information on Briefcase Browser preferences.

Caution:

If you are working with NX parts or assemblies in a Briefcase file, including creating a new Briefcase file, the part or assembly must not be open in the CAD application or any other application that can create a lock on the associated file. The Briefcase Browser **Save Briefcase** and **Synchronize** commands do not function as intended if a file is locked by another application. This can cause data inconsistencies in the generated Briefcase file.

Briefcase Browser documentation

View Briefcase Browser documentation by choosing **Help Contents** from the **Help** menu. Briefcase Browser documentation is also available in PDF format:


```
bb_install_path\BB\BB_version\docs\Teamcenter_Briefcase_Browser_Guide.pdf
```

Opening and working with Briefcase files

You can open Briefcase files to perform several actions, including:

- Adding new local supplier parts.
- Changing existing supplier parts in the structure.
- Adding a local supplier top assembly to an OEM supplied structure.
- Making a CAD assembly complete.
- Building a component structure.
- Previewing a structure.

To open a Briefcase file that was exported to your site from a managed site or a file you created:

1. Choose **File**→**Open Briefcase**. Alternatively, you can click the open Briefcase button  on the toolbar.
2. In the **Select a file representing the briefcase** dialog box, browse to the file location and click **Open**.
3. In the **Open Briefcase File** dialog box, click **Choose File**, browse to the desired Briefcase file, and click **Open**.
4. If you are opening a Briefcase file that contains delta NX assembly data, check **Specify different working directory**, set the working directory to the directory that contains the original Briefcase contents, and click **OK**.

If you are opening a Briefcase file and wish to retrieve any changes made to existing CAD parts that are owned by your site, check **Specify different working directory**, browse to the working directory, and click **OK**.

Otherwise, click **OK** and the directory containing the Briefcase file becomes the working directory.

Briefcase Browser displays the selected Briefcase file structure in the **Existing Structure** tab of the structure view.

Warning:

The working directory can be a remote directory. However, if there are multiple Briefcase Browser users in your organization, multiple users using the same working directory at the same time can result in a corrupt or invalid Briefcase file. To avoid this, ensure that you use different working directories or that users do not use the same working directory at the same time.

5. (Optional.) Click the **Controls/Properties** tab to view the schema used for the current configuration. You can also click **View** on this tab to browse the contents of the current working directory.
6. (Optional.) Double-click the name tab at the top of the structure view to minimize all other views and expand the structure view to the entire size of perspective. Right-click the tab and choose **Restore** to restore the original view.


Working with Briefcase files containing NX data

The Briefcase file may contain incomplete CAD assemblies, partial BOM assemblies, delta BOM assemblies, or variant configured assemblies.

1. With the Briefcase file open, select an item that has a CAD dataset attached and choose **Tools**→**Launch NX**.

Briefcase Browser starts NX and loads the CAD data.

2. In NX, add local parts to the assembly or add OEM owned parts to a local assembly and save the changes.
3. Synchronize the file to get the modified CAD data into the Briefcase file.

Choose **Tools→Synchronize** or click the synchronize button .


4. In Briefcase Browser, choose **File→Save Briefcase** to update the Briefcase file with the CAD changes and required Teamcenter TC XML data.

Working with Briefcase files containing CATIA data

1. With the Briefcase file open, select an item that has a CAD dataset attached and choose **Tools→View in CATIA**.

Briefcase Browser starts CATIA and loads the CAD data.


2. In CATIA, add local parts to the assembly or add OEM owned parts to a local assembly and save the changes.
3. You must synchronize the file to get the modified CAD data into the Briefcase file.

Choose **Tools→Synchronize Briefcase** or click the synchronize Briefcase button .

4. In Briefcase Browser, choose **File→Save Briefcase** to update the Briefcase file with the CAD changes and required Teamcenter TC XML data.

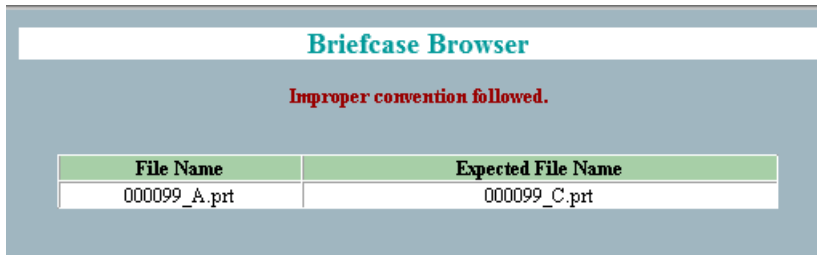
Open a CAD file (create a new CAD object)

You can create a Briefcase file based on a CAD assembly or part. Briefcase Browser creates the required TC XML data to provide a valid Briefcase file. Briefcase Browser also validates the CAD file meets certain requirements and provides an error report if the requirements are not met. Briefcase Browser does not load files that are not valid.

1. Choose **File→Open CAD Assembly**. Alternatively, you can click the **Open CAD Assembly** button  on the toolbar.
2. Click **Choose File** and navigate to the desired CAD part (**.prt**) file and click **Open**.

Briefcase Browser loads the CAD file into the **Existing Structure** tab and creates the required TC XML data including the objects, required attributes, and structure. The path and file name are shown at the top tabs of the structure view.

Briefcase Browser displays an error report if the file does not pass validation.



3. Choose **File**→**Save Briefcase** to save the structure as a Briefcase file.

Note:

Briefcase Browser sets the release status for all new CAD parts or assemblies to the value you select in **Release status name** list of the Preferences dialog. If you want to use a different value, select the a new value from the list before you save the Briefcase file.



Add non-CAD files to a modifiable part

After opening a Briefcase, you can attach non-CAD files such as Microsoft Word or JT to a modifiable part in a CAD assembly.

Caution:

Briefcase Browser uses a CAD part naming convention to identify NX drawing files. The use of **_s_** or **_m_** in a file name denotes an NX drawing. Therefore, non-CAD files must not contain the **_s_** or **_m_** character sequences in the file name.

Additionally, you cannot add the same file as a dataset to two different objects as the global stable identifier for each is different but the file name is the same. This causes an import error when the file is imported to Teamcenter. To avoid this, add the dataset to the first object, save and close Briefcase Browser. Reopen Briefcase Browser to start a new session and add the file to the second object. This allows a different file name for the dataset in the second session.

1. Choose **File**→**Open CAD Assembly**. Alternatively, you can click the  button on the toolbar.
2. In the **Existing Structure** tab of the structure view, select the part to which you want to attach non-CAD files. A non-CAD file can be added to any modifiable part (site-checked out parts or supplier parts).
3. You can attach non-CAD files in three ways:
 - From the **Tools** menu, select **Add Dataset**.
 - From the toolbar, click .
 - Right-click the local part, to open the context menu **Add Dataset**.


4. In the **Select the non-CAD file** dialog box, browse to the desired non-CAD file, and click **Open**.
5. In the **Add Dataset** dialog box, select the **Relationship Name** from the list to associate it with the non-CAD file. Click **OK** to add the file to the part.

The relationship name is populated if it is specified in the **CustomDatasetMappings.xml** file. However, you can change the default relationship name if no relationship is specified, or you can choose a different relationship.

You can add the file only if the selected file has a valid file extension (defined in the **CustomDatasetMappings.xml** file). If not defined, the **OK** button is disabled.

6. Non-CAD files can also be added to a modifiable part automatically that follow naming convention. While opening a CAD assembly, if there are any non-CAD files that match any modifiable parts in the assembly with valid extensions defined in the **CustomDataMappings.xml** file, appropriate datasets are created and attached to the modifiable part.
7. The new dataset and the relationship is added to the **Dataset** view of the part. To view the file added as the dataset, expand the dataset, select the file, and double-click to open the file in the respective editor.
8. Once the non-CAD files are attached to the CAD files, you must synchronize the file to get the modified CAD data into the Briefcase file. If the changes are restricted to non-CAD files, synchronization is not required.


For Briefcase files containing NX data, choose **Tools→Synchronize** or click the synchronize button .

For Briefcase files containing CATIA data, choose **Tools→Synchronize Briefcase** or click the synchronize Briefcase button .

9. Click  to save the file. Alternatively, you can choose **File→Save Briefcase**.

The saved Briefcase will contain non-CAD datasets attached to the modifiable parts that are sent to the managed sites to be imported into Teamcenter.

Remove non-CAD files from a modifiable part

To remove non-CAD files from the modifiable parts, in the **Dataset** view, select the file and click **Delete** .

The Non-CAD dataset is removed from the part. The saved Briefcase does not contain datasets, data files, and relations specific to deleted datasets.

Note:

For Briefcase files containing NX data, the **UGMaster** object cannot be deleted using this option. Only non-CAD files attached to the **UGMaster** object can be deleted.

Compare Briefcase files


You can compare two Briefcase files and display the differences in the **Red Line Structure** tab in the structure view. Briefcase Browser displays deleted objects in red and added objects in green in this tab.

1. If you do not have one of the Briefcase files being compared open, choose **File→Open Briefcase**, and select the first file. Briefcase Browser loads this file into the **Existing Structure** tab of the structure view.
2. Choose **Tools→Compare the briefcase to another briefcase**, and select the file you want to compare.

Briefcase Browser loads this file into an **Proposed Structure** tab of the structure view and displays the differences in the **Red Line Structure** tab. Objects added, removed, and changed in the proposed structure are displayed in different text colors in the **Red Line Structure** tab as defined by the Briefcase comparison preferences in the **Preferences** dialog box.


You can also use the compare button  on the **Controls/Properties** tab to load the file to compare.

Modify NX data in a Briefcase file

1. Start Briefcase Browser, choose **File→Open Briefcase**, and select the Briefcase file that contains the CAD data to be modified.
2. In the **Existing Structure** tab of the structure view, select the object that you want to modify. Your site must own the object, and it must not be checked out to a remote site. This is indicated by the local item revision symbol .

Alternatively, you can choose **Tools→Launch** to open the CAD object in NX.


The Briefcase file must be saved if it was created in Briefcase Browser.

3. After you edit the object in NX and save it, select the object name tab in the **Existing Structure** tab of the structure view click the synchronize button .

Caution:


When adding existing parts to an assembly in NX, you must use the **Add Component** command. If you copy and paste the part to create a new occurrence, the synchronize action

in Briefcase Browser does not create a unique occurrence. This causes an import error when you attempt to import the Briefcase package into Teamcenter.

4. Click the save Briefcase button  to save the file. Alternatively, you can choose **File→Save Briefcase**.



The modified NX data is saved to the Briefcase file that can now be sent to the managed site to be imported into Teamcenter.

Modify CATIA data in a Briefcase file

1. Start Briefcase Browser, choose **File→Open Briefcase**, and select the Briefcase file that contains the CAD data to be modified.
2. In the **Existing Structure** tab of the structure view, select the object that you want to modify. Your site must own the object, and it must not be checked out to a remote site. This is indicated by the local item revision icon (.

Alternatively, you can choose **Tools→Launch** to open the CAD object in CATIA.

The Briefcase file must be saved if it was created in Briefcase Browser.

3. After you edit the object in CATIA and save it, select the object name tab in the **Existing Structure** tab of the structure view click the synchronize button .
4. Click the save Briefcase button  to save the file. Alternatively, you can choose **File→Save Briefcase**.

The modified CATIA data is saved to the Briefcase file that can now be sent to the managed site to be imported into Teamcenter.

Modify JT data in a Briefcase file

When you have the Briefcase Browser JT plugin **installed**, you can open and update JT files supplied to you in Briefcase files. When existing JT files are not delivered in the Briefcase file, Briefcase Browser automatically creates component and assembly JT files based on the contents of the Briefcase file. You can open and edit these empty JT files to supply CAD data to the managed site.

For example, a managed site creates the following structure:

```

TopNode_A
  |__SubAssembly_A
    |__comp1_A
    |__comp2_A
  
```

```

|__SubAssembly1_A
  |_comp3_A

```

The managed site then exports the structure to a Briefcase file, granting ownership to the unmanaged site. When the unmanaged site opens the Briefcase file using Briefcase Browser with the JT plugin installed, the following component JT objects are created in the working directory:

- *comp1_A.jt*
- *comp2_A.jt*
- *comp3_A.jt*

The following assembly JT objects are created in the working directory:

- *TopNode_A.jt*
- *SubAssembly_A.jt*
- *SubAssembly1_A.jt*


Use the following process to edit the JT files in your CAD software and return the updated JT objects to the managed site.

1. Start Briefcase Browser, choose **File→Open Briefcase**, and select the Briefcase file that contains the JT data to be modified.

The **Open Briefcase File** dialog box is displayed.

2. Check **Specify different working directory**, browse to the working directory, and click **OK**.
3. When the Briefcase file opens in Briefcase Browser, the Briefcase contents are saved in the working directory.

In the working directory, locate the JT objects you wish to update.


4. Use your existing translator utilities to convert the JT objects to your CAD software file format. Your site must own the objects, and they must not be checked out to a remote site. This is indicated by the local item revision icon ()

Update the converted files using your CAD software.

5. When you have completed editing the CAD files, use your existing translator utilities to convert the CAD files to JT objects.

Ensure the translated JT objects are saved with the same file names as the JT objects created by Briefcase Browser.

If you saved the newly-translated JT objects in another directory, copy them to the working directory specified earlier in this procedure, overwriting the original JT objects.


6. In Briefcase Browser, select the object name tab in the **Existing Structure** tab of the structure view click Synchronize .
7. Choose **File→Save Briefcase** to save the Briefcase file.

The modified JT data is saved to the Briefcase file. You can now send the Briefcase file to the managed site to be imported into Teamcenter.

Synchronize CAD data


Modified CAD data must be synchronized with the Briefcase file to include the modified data in the file. Use the following procedures to synchronize your type of modified CAD data.

Synchronize NX data

1. Ensure the tab for the Briefcase file that has modified NX objects is selected in the **Existing Structure** tab of the structure view.
2. Choose **Tools→Synchronize** or click the synchronize button .


Briefcase Browser updates the CAD data in the Briefcase file with the modified CAD data. You must save the Briefcase file (**File→Save Briefcase**) before closing it or exiting Briefcase Browser to maintain the updated CAD data in the Briefcase file. If there are any non-CAD files in the working directory with the same base file name, they are added to respective parts.


Synchronize CATIA data

1. Start Briefcase Browser, choose **File→Open Briefcase**, and select the Briefcase file that contains the CAD data to be modified.
2. In the **Existing Structure** tab of the structure view, select the object that you want to modify. Your site must own the object, and it must not be checked out to a remote site. This is indicated by the local item revision icon (.

Alternatively, you can choose **Tools→Launch** to open the CAD object in CATIA.


The Briefcase file must be saved if it was created in Briefcase Browser.

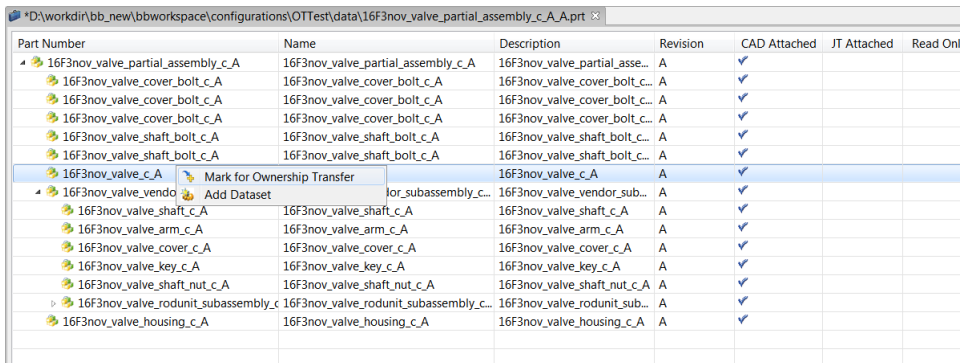
3. After you edit the object in CATIA and save it, select the object name tab in the **Existing Structure** tab of the structure view click the synchronize Briefcase button .

- Click the save Briefcase button  to save the file. Alternatively, you can choose **File→Save Briefcase**.


The modified CATIA data is saved to the Briefcase file that can now be sent to the managed site to be imported into Teamcenter.

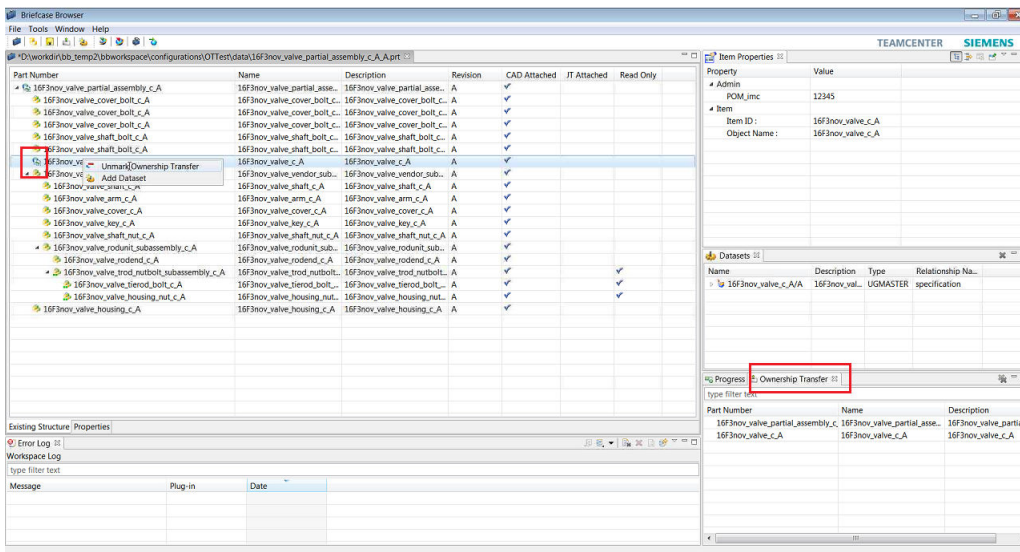
Transfer ownership of local parts

- Start Briefcase Browser, choose **File→Open CAD Assembly**, and select the Briefcase file that contains the local parts owned by you.
- In the **Existing Structure** tab of the structure view, select the parts that you want to mark for ownership transfer. Your site must own the part, and it must not be checked out to a remote site. This is indicated by the local item revision symbol .
- Right-click a local part to open the context menu **Mark for Ownership Transfer**.



Part Number	Name	Description	Revision	CAD Attached	JT Attached	Read Only
16F3nov_valve_partial_assembly_c_A	16F3nov_valve_partial_assembly_c_A	16F3nov_valve_partial_asse...	A	✓		
16F3nov_valve_cover_bolt_c_A	16F3nov_valve_cover_bolt_c_A	16F3nov_valve_cover_bolt_c...	A	✓		
16F3nov_valve_cover_bolt_c_A	16F3nov_valve_cover_bolt_c_A	16F3nov_valve_cover_bolt_c...	A	✓		
16F3nov_valve_cover_bolt_c_A	16F3nov_valve_cover_bolt_c_A	16F3nov_valve_cover_bolt_c...	A	✓		
16F3nov_valve_shaft_bolt_c_A	16F3nov_valve_shaft_bolt_c_A	16F3nov_valve_shaft_bolt_c...	A	✓		
16F3nov_valve_shaft_bolt_c_A	16F3nov_valve_shaft_bolt_c_A	16F3nov_valve_shaft_bolt_c...	A	✓		
16F3nov_valve_c_A	16F3nov_valve_c_A	16F3nov_valve_c_A	A	✓		
16F3nov_valve_vendor_subassembly_c_A	16F3nov_valve_vendor_sub...	16F3nov_valve_vendor_sub...	A	✓		
16F3nov_valve_shaft_c_A	16F3nov_valve_shaft_c_A	16F3nov_valve_shaft_c_A	A	✓		
16F3nov_valve_arm_c_A	16F3nov_valve_arm_c_A	16F3nov_valve_arm_c_A	A	✓		
16F3nov_valve_cover_c_A	16F3nov_valve_cover_c_A	16F3nov_valve_cover_c_A	A	✓		
16F3nov_valve_key_c_A	16F3nov_valve_key_c_A	16F3nov_valve_key_c_A	A	✓		
16F3nov_valve_shaft_nut_c_A	16F3nov_valve_shaft_nut_c_A	16F3nov_valve_shaft_nut_c_A	A	✓		
16F3nov_valve_rodunit_subassembly_c_A	16F3nov_valve_rodunit_subassembly_c...	16F3nov_valve_rodunit_sub...	A	✓		
16F3nov_valve_housing_c_A	16F3nov_valve_housing_c_A	16F3nov_valve_housing_c_A	A	✓		

The parts marked for ownership transfer will then be listed in the **Ownership Transfer** view. Once the part is marked for ownership transfer, the icon for that part changes to .



The screenshot shows the Briefcase Browser interface with the 'Ownership Transfer' view selected. The table below shows the parts listed in this view:

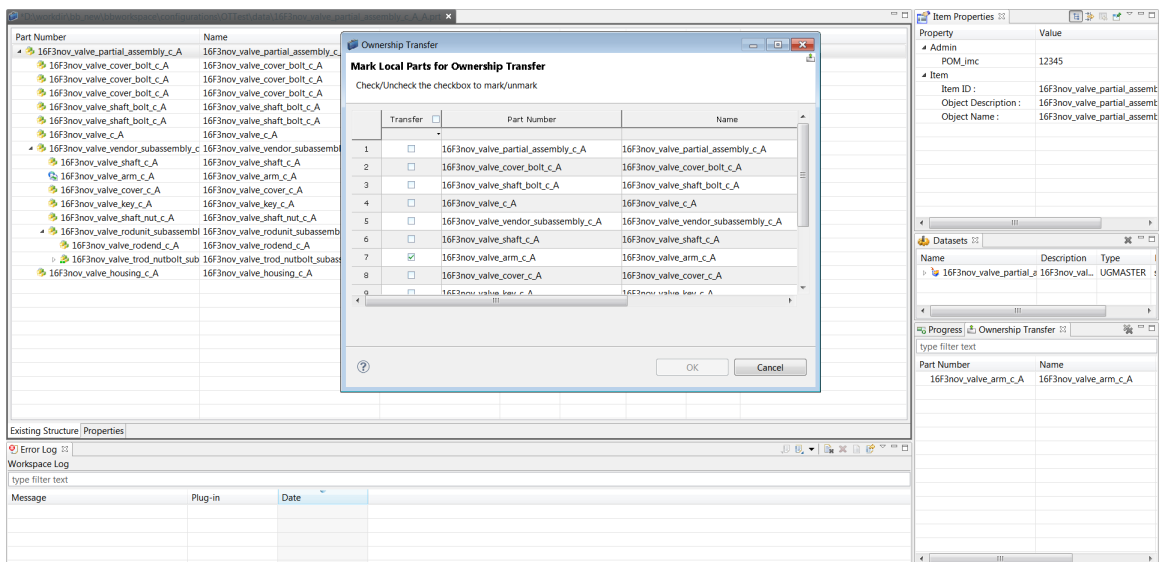
Part Number	Name	Description	Revision	CAD Attached	JT Attached	Read Only
16F3nov_valve_partial_assembly_c_A	16F3nov_valve_partial_asse...	16F3nov_valve_partial_asse...	A	✓		
16F3nov_valve_cover_bolt_c_A	16F3nov_valve_cover_bolt_c...	16F3nov_valve_cover_bolt_c...	A	✓		
16F3nov_valve_cover_bolt_c_A	16F3nov_valve_cover_bolt_c...	16F3nov_valve_cover_bolt_c...	A	✓		
16F3nov_valve_cover_bolt_c_A	16F3nov_valve_cover_bolt_c...	16F3nov_valve_cover_bolt_c...	A	✓		
16F3nov_valve_shaft_bolt_c_A	16F3nov_valve_shaft_bolt_c...	16F3nov_valve_shaft_bolt_c...	A	✓		
16F3nov_valve_shaft_bolt_c_A	16F3nov_valve_shaft_bolt_c...	16F3nov_valve_shaft_bolt_c...	A	✓		
16F3nov_valve_c_A	16F3nov_valve_c_A	16F3nov_valve_c_A	A	✓		
16F3nov_valve_vendor_sub...	16F3nov_valve_vendor_sub...	16F3nov_valve_vendor_sub...	A	✓		
16F3nov_valve_shaft_c_A	16F3nov_valve_shaft_c_A	16F3nov_valve_shaft_c_A	A	✓		
16F3nov_valve_arm_c_A	16F3nov_valve_arm_c_A	16F3nov_valve_arm_c_A	A	✓		
16F3nov_valve_cover_c_A	16F3nov_valve_cover_c_A	16F3nov_valve_cover_c_A	A	✓		
16F3nov_valve_key_c_A	16F3nov_valve_key_c_A	16F3nov_valve_key_c_A	A	✓		
16F3nov_valve_shaft_nut_c_A	16F3nov_valve_shaft_nut_c_A	16F3nov_valve_shaft_nut_c_A	A	✓		
16F3nov_valve_rodunit_sub...	16F3nov_valve_rodunit_sub...	16F3nov_valve_rodunit_sub...	A	✓		
16F3nov_valve_rodunit_sub...	16F3nov_valve_rodunit_sub...	16F3nov_valve_rodunit_sub...	A	✓		
16F3nov_valve_trod_nutbolt...	16F3nov_valve_trod_nutbolt...	16F3nov_valve_trod_nutbolt...	A	✓	✓	
16F3nov_valve_tierod_bolt_c_A	16F3nov_valve_tierod_bolt...	16F3nov_valve_tierod_bolt...	A	✓	✓	
16F3nov_valve_tierod_bolt_c_A	16F3nov_valve_tierod_bolt...	16F3nov_valve_tierod_bolt...	A	✓	✓	
16F3nov_valve_housing_nut...	16F3nov_valve_housing_nut...	16F3nov_valve_housing_nut...	A	✓	✓	
16F3nov_valve_housing_c_A	16F3nov_valve_housing_c_A	16F3nov_valve_housing_c_A	A	✓		

The 'Ownership Transfer' view is highlighted in the interface, and the 'Ownership Transfer' button is visible in the bottom right corner.

- Alternatively, you can also mark parts for ownership transfer from the **Ownership Transfer** dialog box.

Click **Tools**→**Transfer Ownership** to open the **Ownership Transfer** dialog box. Alternatively, select **Ownership Transfer** from the toolbar button.

The parts listed in the **Ownership Transfer** dialog box depends on what is selected in the **Existing Structure** view. If no parts are selected in the **Existing Structure** view, all the parts are listed in the **Ownership Transfer** dialog box. If a given sub assembly is selected, then all local parts of that sub assembly are listed in the **Ownership Transfer** dialog box.




The parts marked for ownership will have the check box selected.

- Select parts that you want to additionally mark for ownership transfer and click **OK**.
- To unmark a part marked for ownership transfer, from the **Existing Structure** view, select that part and right click to open a context menu **Unmark Ownership Transfer**.

Alternatively you can also unmark the parts from the **Ownership Transfer** dialog box. Clear the check box against the part that is already selected for ownership transfer.

- To transfer the ownership of the selected local parts, Click the save Briefcase button . Alternatively, you can choose **File**→**Save Briefcase**.

The local parts whose ownership is now transferred are now read-only as they are now owned by target site. These parts are indicated by the remote item symbol .

4. Using Briefcase Browser

Briefcase Browser

File Tools Window Help

D:\workdir\bb_new\bbworkspace\configurations\OTTest\data\16F3nov_valve_partial_assembly_c_A_A.prt

Part Number	Displays a briefcase or a briefcase comparison.	Description	Revision	CAD Attached	JT Attached	Read Only
16F3nov_valve_partial_assembly_c_A	16F3nov_valve_partial_assembly_c_A	16F3nov_valve_partial_asse...	A	✓		
16F3nov_valve_cover_bolt_c_A	16F3nov_valve_cover_bolt_c_A	16F3nov_valve_cover_bolt_c...	A	✓		
16F3nov_valve_cover_bolt_c_A	16F3nov_valve_cover_bolt_c_A	16F3nov_valve_cover_bolt_c...	A	✓		
16F3nov_valve_cover_bolt_c_A	16F3nov_valve_cover_bolt_c_A	16F3nov_valve_cover_bolt_c...	A	✓		
16F3nov_valve_shaft_bolt_c_A	16F3nov_valve_shaft_bolt_c_A	16F3nov_valve_shaft_bolt_c...	A	✓		
16F3nov_valve_shaft_bolt_c_A	16F3nov_valve_shaft_bolt_c_A	16F3nov_valve_shaft_bolt_c...	A	✓		
16F3nov_valve_c_A	16F3nov_valve_c_A	16F3nov_valve_c_A	A	✓		✓
16F3nov_valve_vendor_subassembly_c_A	16F3nov_valve_vendor_subassembly_c...	16F3nov_valve_vendor_sub...	A	✓		
16F3nov_valve_shaft_c_A	16F3nov_valve_shaft_c_A	16F3nov_valve_shaft_c_A	A	✓		
16F3nov_valve_arm_c_A	16F3nov_valve_arm_c_A	16F3nov_valve_arm_c_A	A	✓		✓
16F3nov_valve_cover_c_A	16F3nov_valve_cover_c_A	16F3nov_valve_cover_c_A	A	✓		
16F3nov_valve_key_c_A	16F3nov_valve_key_c_A	16F3nov_valve_key_c_A	A	✓		
16F3nov_valve_shaft_nut_c_A	16F3nov_valve_shaft_nut_c_A	16F3nov_valve_shaft_nut_c_A	A	✓		
16F3nov_valve_rodunit_subassembly_c_A	16F3nov_valve_rodunit_subassembly_c...	16F3nov_valve_rodunit_sub...	A	✓		
16F3nov_valve_rodend_c_A	16F3nov_valve_rodend_c_A	16F3nov_valve_rodend_c_A	A	✓		
16F3nov_valve_trod_nutbolt_subassen	16F3nov_valve_trod_nutbolt_subassem...	16F3nov_valve_trod_nutbolt...	A	✓		✓
16F3nov_valve_housing_c_A	16F3nov_valve_housing_c_A	16F3nov_valve_housing_c_A	A	✓		

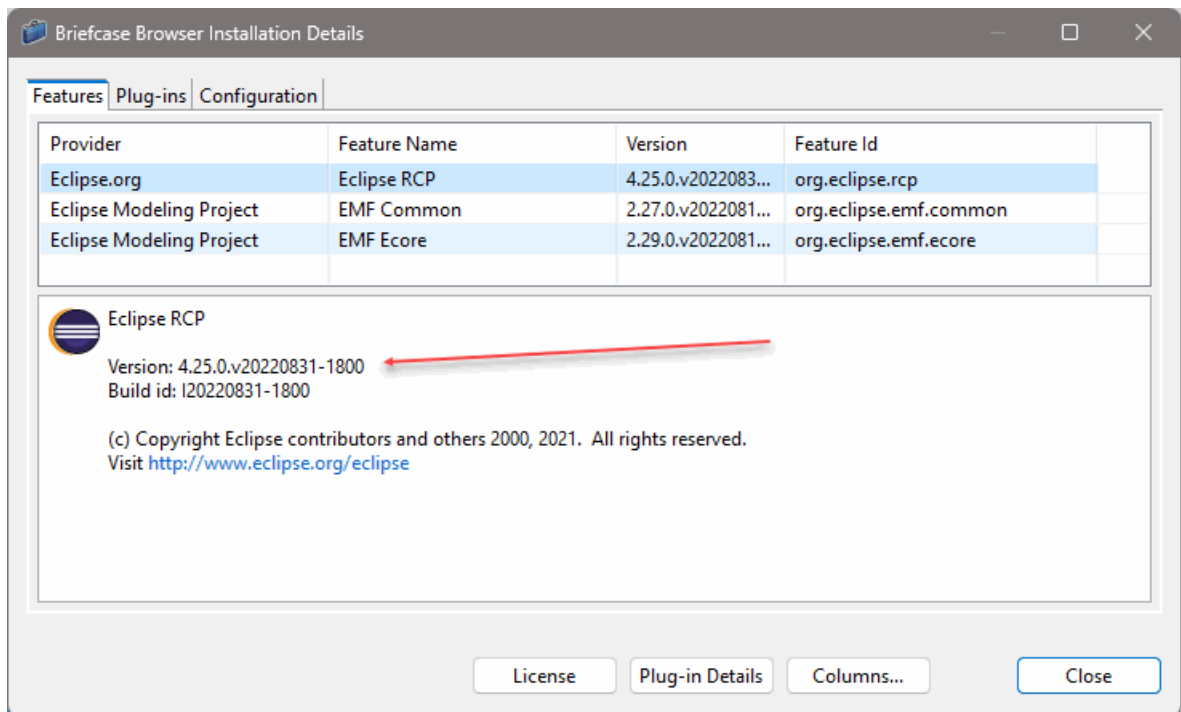
5. Customizing Briefcase Browser

What you need to know and what you can customize

You must have an understanding of how to create an Eclipse plug-in to customize Briefcase Browser. After you create an Eclipse plug-in project for your customization, you can create extensions for any Briefcase Browser classes, the file launcher, and the synchronizer. You must set up an Eclipse project for your customizations; the process is slightly different for each type of customization (file launcher, synchronizer, preopen, postopen, presave, postsave, addDataset, and deleteDataset).

Create a plug-in project

1. Ensure that you have the correct Eclipse IDE version:
 - a. Start Briefcase Browser and choose **Help**→**About**.
 - b. Click **Installation Details** at the bottom of the **About Briefcase Browser** dialog box.
 - c. In the **Briefcase Browser Installation Details** dialog box, locate the version for the Eclipse RCP feature. This is the version required to customize your version of Briefcase Browser. For example:



2. Create your plug-in project:

- a. Start your Eclipse IDE and choose **New→Project**.
- b. In the **New Project** dialog box double-click the Plug-in Project wizard.
- c. In the **Plug-In Project** pane, type a name for your project in the **Project name** box. Modify any other desired settings and click **Next**.
- d. Modify any desired settings in the **Content** pane and click **Finish**.

3. Add a Briefcase Browser plug-in reference:

- a. Right-click in the **Package Explorer** pane and choose **Import**.
- b. In the **Import** dialog box, expand **Plug-in Development** and double-click **Plug-ins and Fragments**.

Eclipse starts the Import Plug-ins and Fragments wizard.

- c. In the **Import Plug-ins and Fragments** pane, select the **Directory** option, browse to the **plugins** directory of your Briefcase Browser installation, and click **Next**.
- d. In the **Selection** pane, type **com.teamcenter.bce** in the **Filter Available Plug-ins and Fragments** box, select the following plug-ins, click **Add→**, and click **Finish**.

- **com.teamcenter.bce.core**
- **com.teamcenter.bce.editor**
- **com.teamcenter.bce.model**

4. Add Briefcase Browser plug-in dependencies:

- a. In the **Package Explorer** tab, expand **META-INF** and double-click **MANIFEST.MF**.

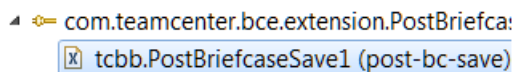
Eclipse displays the extension project **Overview** tab.

- b. Click the **Dependencies** tab at the bottom of the center pane and click the **Add** button for the **Required Plug-ins** list.
- c. In the **Plug-in Selection** dialog box, type **com.teamcenter.bce** in the **Select a Plug-in** box to filter on the Briefcase Browser plug-ins, select the matching items, and click **OK**.
- d. Choose **File→Save** to save the changes to the project **META-INF/MANIFEST.MF** file.

Create a class extension

The class extension provides the class to call to access your other customizations.

1. Expand the project to the **META-INF** folder in the **Package Explorer** tab, and double-click **MANIFEST.MF**.
2. Click the **Extensions** tab at the bottom of the center pane, and click **Add** in the **Extensions** pane.
3. In the **Extension Point Selection** dialog box, type **com.teamcenter.bce** in the **Extension Point filter** box to filter on the Briefcase Browser extensions.
4. In the **Extension Points** list, select the extension point for the class you want to extend and click **Finish**.
5. In the **All Extensions** pane, select the extension point child node (the extension point selected in the previous step, see the following figure) and click **class** in the **Extension Element Details** pane.



```

  ▲ com.teamcenter.bce.extension.PostBriefca:
    [X] tcbb.PostBriefcaseSave1 (post-bc-save)
  
```

Eclipse displays the **New Java Class** dialog box.

6. Set the desired values and options for the new Java class and click **Finish**.

Caution:

You can modify the **Interfaces** box contents; however it must contain the reference to the selected extension point that Eclipse adds by default. Do not remove this reference.

Create a file launcher extension

Create a file launcher if you want to launch an application to view or process a particular file type when the user clicks it.

1. Create an **icons** folder in your Eclipse plug-ins project (choose **New**→**Folder**). This creates a directory in your customization project structure in the file system. Add the icon you want to use in the toolbar for your file launcher to this directory.

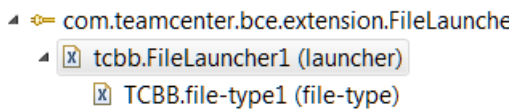
Caution:

Ensure you include the **icons** directory in the binary build.

2. Expand the project to the **META-INF** folder in the **Package Explorer** tab, and double-click **MANIFEST.MF**.

3. Click the **Extensions** tab at the bottom of the center pane, and click **Add** in the **Extensions** pane.
4. In the **Extension Point Selection** dialog box, type **com.teamcenter.bce** in the **Extension Point filter** box to filter on the Briefcase Browser extensions.
5. In the **Extension Points** list, select **com.teamcenter.bce.extension.FileLauncher** and click **Finish**.
6. In the **All Extensions** pane, select the **launcher** child node of the **com.teamcenter.bce.extension.FileLauncher** extension (see the following figure) and click **Browse** in the **Extension Element Details** pane.

Browse to the location of an icon file that you want to use as the toolbar icon for the launcher.



7. In the **All Extensions** pane, select the **file-type** child node of the **com.teamcenter.bce.extension.FileLauncher** extension and type the file extension in the **extension** box in the **Extension Element Details** pane.

If you want to add more than one file launcher, enter a priority integer in the **priority** box.

The extension indicates the type of file this launcher opens.

A priority value of **1** is the highest priority. The priority value is used to determine which launcher to use by default when the file type is included in more than one launcher.

8. To add additional file types to a launcher, right-click the **launcher** child node in the **All Extensions** pane and choose **New**→**file-type**.

Eclipse adds a new file-type child node to the file launcher. Repeat the previous step for the new file-type child node.

Create a synchronizer extension

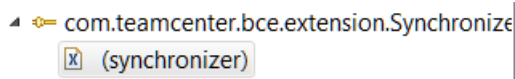
Create a synchronizer extension if you want Briefcase Browser to be able to open a particular file type and create a Briefcase file from it.

1. Create an **icons** folder in your Eclipse plug-ins project (choose **New**→**Folder**). This creates a directory in your customization project structure in the file system. Add the icon you want to use as the toolbar and menu command icon for the synchronizer to this directory.

Caution:

Ensure you include the **icons** directory in the binary build.

2. Expand the project to the **META-INF** folder in the **Package Explorer** tab and double-click **MANIFEST.MF**.
3. Click the **Extensions** tab at the bottom of the center pane and click **Add** in the **Extensions** pane.
4. In the **Extension Point Selection** dialog box, type **com.teamcenter.bce** in the **Extension Point filter** box to filter the Briefcase Browser extensions.
5. In the **Extension Points** list, select **com.teamcenter.bce.extension.Synchronizer** and click **Finish**.
6. In the **All Extensions** pane, select the **synchronizer** child node of the **com.teamcenter.bce.extension.Synchronizer** extension (see the following figure) and in the **Extension Element Details** pane:
 - Type the extension for the type of file in a dataset that can be opened from the Briefcase Browser **Open** dialog box or can be synchronized using the Briefcase Browser **Refresh** button.
 - Browse to the location of an icon file that you want to use as the toolbar and menu command icon for the synchronizer.



A. Troubleshooting

Determining what is wrong

If your site:

- Has sent data to a Teamcenter (managed) site prior to using Briefcase Browser
- Is defined at the Teamcenter as an offline (managed) site

You must perform an unmanaged site migration for the previously sent data to avoid errors and unexpected results.

If you encounter...	Then...
A failure while saving the Briefcase in Briefcase Browser	See <i>SQL exceptions</i> .
A failure while synchronizing or saving the Briefcase in Briefcase Browser	Ensure non-CAD attachments added to a part (either automatically following the naming convention, or by using the Add Dataset dialog box) are deleted from the local instance. If an attachment is deleted from the local instance, synchronize and save will fail for the part.
An unhandled exception in Briefcase Browser	See <i>Fixing an unhandled exception error</i> .
A failure when opening a CAD assembly from Briefcase Browser on a 64-bit operating system	Ensure you are running a 64-bit Briefcase Browser and NX applications on a 64-bit operating system.
A failure when using a menu option or a button in Briefcase Browser	See <i>Null pointer exceptions</i> .
A failure when opening or saving a CAD assembly in Briefcase Browser when another CAD product is installed on the same host as NX	See <i>Causes of unexplained errors</i> .
An error message when saving a Briefcase file that contains new parts	See <i>NX part requirements</i> .
An error message when opening or synchronizing a Briefcase file on a non-English operating system	Ensure the Format box in the Windows Region and Language dialog box is set to the local language of your Briefcase Browser application or to US English. Otherwise, the date formats used do not match and can cause this error.
NX does not launch when you double-click a part file in Briefcase Browser	See <i>NX does not display a part when it is opened from Briefcase Browser</i> .

SQL exceptions

If you open and modify parts that were created or used in an earlier version of Briefcase Browser (10.1 or earlier), from an existing working directory, an SQL exception may occur during the save action. This happens when an update to the Briefcase database contains new or modify attributes or elements.

To avoid this, delete any existing folders with old database files (**attributes.db** and **elements.db**) before opening the parts in a newer Briefcase Browser version.

Importing a Briefcase file in Teamcenter fails after migration

After migrating Briefcase Browser to Teamcenter, while trying to export data from the migrated Teamcenter to other site an error occurs.

To avoid this, you should set the **opt_all_ds_vers** option set value to true.

Fixing an unhandled exception error

If the Briefcase Browser error log contains an error message similar to the following:

```
Unhandled event loop exception
```

A third-party tool may be hijacking the Java process environment.

To resolve this issue, remove the third-party tool or change the **JAVA_ARGS** or **JAVA_OPTS** environment variable values to the Briefcase Browser required settings.

Null pointer exceptions

Briefcase Browser is an Eclipse-based Java application. See [Requirements for using Briefcase Browser](#) for Java Runtime Environment (JRE) requirements

If you encounter errors in Briefcase Browser, such as a null pointer exceptions, you may be running an incompatible JRE version. Ensure that your JRE meets the stated requirements and its location is in your **PATH** environment variable.

If the JRE version and **PATH** variable are correct ensure that you copied or extracted the JRE contents into the directory that contains your Briefcase Browser application (**BriefcaseBrowser.exe**) during the installation procedure.

Causes of unexplained errors

Unexplained errors are normally a configuration issue. Ensure that you have the **UGII_ROOT_DIR**, **UGII_BASE_DIR**, and **PATH** environment variables set properly as described in the installation instructions and that you have the JRE installed and configured.

If you have another CAD product, such as Pro/ENGINEER, installed on the same host as your NX application, add the **UGII_ROOT_DIR** environment variable to the front of the **PATH** environment variable.

NX does not display a part when it is opened from Briefcase Browser

On systems where Teamcenter Integration for NX is installed, the *.prt* extension is associated with Teamcenter Integration for NX. When you double-click a *.prt* file the operating system tries to open it in Teamcenter Integration for NX. Because Teamcenter Integration for NX does not support opening local files, it does not display the part. This behavior is retained even if you have the NX application installed. If you double-click a *.prt* file it launches NX but does not open the part file. Therefore, if you select an NX part file in Briefcase Browser and click **Launch NX**, NX opens but does not display the part.

This is due to the Windows file association for the *.prt* extension being set to the wrong program. You must change the file association to open the file with NX.

Change the file association to use the following command to open part files in NX:

```
NX-installation-directory\UGII\ugs_router.exe" -ug -use_file_dir "%1
```

The instructions for changing the Windows default program used to open a file type are provided for your operating system at:

<http://windows.microsoft.com>

To change this association in the Windows registry:


1. Start the registry editor by typing **regedit** in the start menu search box.
2. Choose **Edit→Find**, type **ugs_router.exe** in the Registry Editor **Find** dialog box, and select the **Key** option.
3. Navigate to **HKEY_LOCAL_MACHINE\SOFTWARE\Classes\UGpartfile\shell\open\command**.
4. For NX 11 or later, type *NX-install-directory*\UGII\ugs_router.exe" -ug -use_file_dir "%1".
5. For versions prior to NX 11, type *NX-install-directory*\nxbin\ugs_router.exe" -ug -use_file_dir "%1".

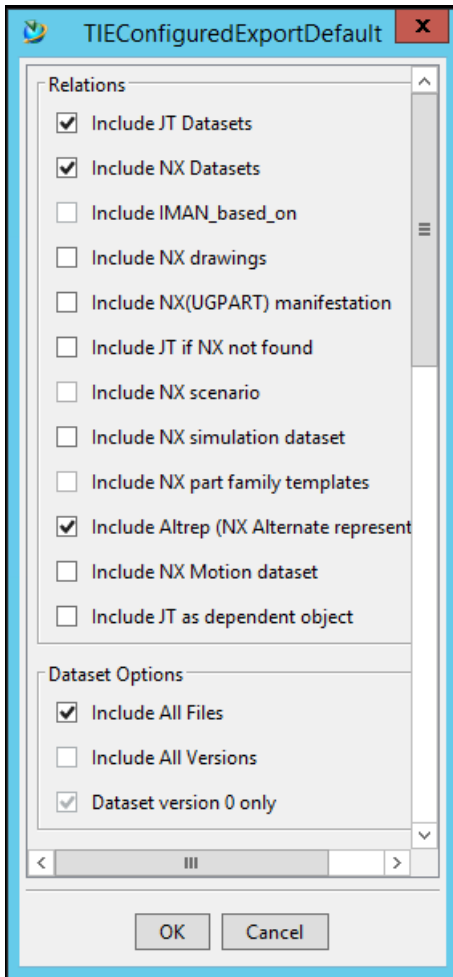
B. Migrate a managed supplier site to an unmanaged site

You can change a supplier site that has previously been defined as a managed site in Teamcenter to an unmanaged site without causing any data errors for previously transferred data. This procedure designates the site migrating to an unmanaged site as the supplier site and the OEM site as a managed site.

1. At the supplier site, identify all assemblies that were sent to the OEM site.
2. Ensure that any shared data is not checked out to a remote site.
3. Create new revisions for all shared items:
 - a. Turn off the smart baseline feature by changing the value of the **ITEM_smart_baseline** preference to **0**.
 - b. At the supplier site, create a baseline of the supplier data that has been sent to the OEM site.

All new revisions occur in the migrated unmanaged site. Shared objects have multiple revisions, and OEM replica parts are not baselined.


4. If the supplier site is a hub site, in the Organization application, clear the **Is a Hub** check box for the supplier site.
5. At the supplier site, export all supplier-owned objects to a Briefcase file.
 - a. Choose **Tools**→**Export**→**To Briefcase**.
 - b. Select the unmanaged site and click the **Display/Set remote export options** button .
 - c. In the **TIEConfiguredExportDefault** dialog box, select the **Replica Bypass** check box.



6. Export all baseline assemblies for migration. This includes:
 - New baseline assemblies that were previously sent.
 - Supplier-owned data.
 - OEM replica data that must be preserved.
7. Install Briefcase Browser at the supplier site being migrated using the same site ID as the managed site for the unmanaged site.
8. In Briefcase Browser, extract all Briefcase files in the migration working directory.
9. Confirm that the Briefcase files extracted meet the OEM requirements.

Notify the Teamcenter administrator at the OEM site that the Briefcase file output is as expected.

10. In the Organization application at the OEM site, modify the previously managed supplier site by selecting the **Unmanaged** option for the site.

- 
11. At the unmanaged supplier site, use Briefcase Browser to add parts to new assemblies. You can copy the required **.prt** files to a new working directory and create Briefcase files based on them.
 12. Transfer the Briefcase files to the OEM and import them into Teamcenter using **Tools→Import→From Briefcase**.