



TEAMCENTER

Document Management on Active Workspace — Usage

Teamcenter 2412

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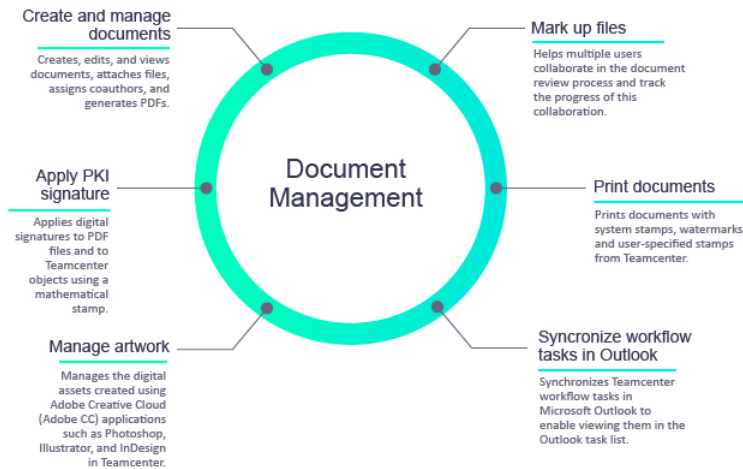
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1. About Document Management

Documents play an important role in product lifecycle management. Teamcenter Document Management helps ensure that the documents conform to an organization's required formats, contain the required content, and are synchronized with the latest product and project information.

Depending on the site requirements, as an author, you can perform various tasks to manage the entire lifecycle of a document as depicted in the following graphic.




Where do I go from here?

Administrator	See <i>Deploying Document Management</i>
Business User	
What are the different ways of creating documents in Teamcenter?	See <i>Create documents</i> .
Can I author documents with another user and simultaneously?	Yes, you can. See <i>Author documents with coauthors simultaneously</i> for details.
How do I mark up files as a part of a document review?	The section on annotating files has details on marking up files as part of a review.
Tell me about PKI signatures.	For an overview and details on PKI signatures, see the information in <i>What is a PKI digital signature?</i>
How do I manage my artwork?	You can manage your artwork using Adobe applications that allow integration with Document Management. For details on the procedure, see the information on how to <i>update artwork in Adobe applications</i> .

2. Synchronize workflow tasks in Outlook

Synchronize your Teamcenter workflow tasks in Microsoft Outlook so that both your Outlook tasks and Teamcenter workflow tasks appear in the Outlook task list. This is an easy way to view all your work tasks displayed in a single list. Open a Teamcenter workflow task to complete the task (or reassign the task) using Active Workspace.

1. In Outlook, click **Tasks**.
2. In the **Teamcenter** tab, click **Synchronize Tasks** .
3. To review your Teamcenter **Inbox** in Outlook, click a Teamcenter task.
4. Alternatively, to open Active Workspace in an Outlook window:
 - a. Double-click a Teamcenter task.
 - b. Click the Teamcenter tab.
 - c. Select **Perform Task** on the Teamcenter tab to display the **Inbox** in a task panel.
5. Complete the task using Active Workspace.

3. Creating or updating documents

About documents

Documents may contain requirements, change notices, design information, descriptions, reports, procedures, or other content, depending on your industry and system configuration. A *document* is a Teamcenter container to hold all your content (text files, graphics and other multimedia files such as videos). The files that you add are attached to the Teamcenter *document* object type.

When the Teamcenter document revision contains only a single file, the document displays the icon of the attached file type. For example, if the document revision contains a single Microsoft Word file, the document displays a Word icon. Now, if you add another file to this Teamcenter document, the icon changes to the generic document icon.

A document with a single file is created only if the **FndODM_IsSimpleDocumentEnabled** preference is set to *true* if configured by your administrator and this behavior is valid only for the following applications: Microsoft Word, Microsoft Excel, Microsoft PowerPoint, and Adobe PDF.

Note:

If required, your administrator can include more file types using item revision definition configuration.

Create documents

You can create *documents*, using any of the following methods. A document is always created with a document revision.

- Use the **CREATE DOCUMENT** tile on the **Home** page.
- Use the **Add panel**.
- **Drag files from your computer to a folder**.

You can also jointly author documents with other users by assigning them as your **coauthors**.

Note:

The steps to create and coauthor documents are not applicable to Google Docs, Google Sheets, and Google Slides.

Create a document revision and attach files by using the CREATE DOCUMENT tile

1. On the **Home** page, click the **CREATE DOCUMENT** tile.

2. In the **Add** panel, enter the required information.
3. (Optional) You can send the document revision through a workflow, such as review or release, if workflows are set up at your site.
4. (Optional) To attach files, under **File Attachments**, click **Choose File**. A file is attached as a *dataset* to the document revision. You can attach multiple files.

Alternatively, you can drag files from your desktop to the area marked as **Drop here**. Though you can attach multiple files, you can drag only one file at a time.

If you choose to skip this step, you can **attach the files later** by searching for the document revision.

5. Click **Add**. If you chose to send the document revision through a workflow, click **Submit**.

Create a document revision through the Add panel

1. In a specific folder, such as **Newstuff** within the **Explorer** tile, or for a specific item revision, choose **More Commands** **>** **New** **>** **Add**. Alternatively, you can click **Add to** in the **CONTENTS** work area.
2. In the **New** tab of the **Add** panel, search for the document type you want to create in **OTHER**, and enter the required information.
3. (Optional) To attach files, click **Choose File**. A file is attached as a *dataset* to the document revision. You can attach multiple files.
4. Click **Add**.

Create a document revision by dragging files from your computer to a folder

You can drag files from your computer to any of these locations in Teamcenter:

- A folder (for example, **Newstuff**)
- A folder's table in the **CONTENTS** work area
- An item revision **>** **Attachments** tab **>** **FILES** section
- A **Document** revision **>** **Overview** tab **>** **FILES** section

By default, a dataset is created for each dragged file.

However, your system administrator can configure your site to create a document revision with the dragged files as attachments. Depending on the way your site is configured, documents are created in one of the following ways:

- If your site is configured to create a document revision automatically, a document revision is created in the selected folder, and the files are attached to this item revision. The document revision is named after the first file in the list of attached files, sorted alphabetically.
- If your site is configured to manage required properties for the documents, the **Add** panel is displayed. To create the document revision:

1. In the **Add** panel, enter the required information.

The document **ID**, **Revision**, and **Name** are automatically filled in. The name of the document is same as the name of the document that is dragged to the folder. You can view the attached document in **File Attachments**.


2. (Optional) You can send the document revision through a workflow, such as review or release, if workflows are set up at your site.
3. Click **Add**. If you chose to send the document revision through a workflow, click **Submit**.

When you drag a file from your computer, the system checks for an existing version of the file before creating a document or a dataset. If a previous file with the same name exists, you can choose to:

- Create a new dataset and attach the file to it.
- Replace the existing file with the new file in the existing document or dataset.
- Cancel the drag operation.

Attach files to an existing document revision

There are several ways to attach one or more files to a document revision. To attach files:



1. Search for the document revision.
2. To attach files directly from your computer, open the folder that contains the files and drag the files to the document revision.
3. Click **Add to**  in the **Files** section of the **Overview** tab to add files.
4. The files are attached as *datasets* to the document revision. A PDF is also created for each attached file, if the document revision is configured to do so by your administrator.

You can view the attached files in the **Viewer** tab. You can view image datasets, if your administrator has installed Visualization Server and has set the **AWC_defaultViewerConfig.VIEWERCONFIG** preference.

Note:

When you attach the spatial data, use vector data instead of raster data when possible. Vector data occupies less memory and disk space. Vector data also renders quickly and prints with no pixelation.

Replace files attached to a document revision

1. Search for the document revision.
2. In the **Files** section of the **Overview** tab, select the file that you want to replace.
3. Choose **More Commands** **...** > **Edit**  > **Replace File** .
4. In the **Replace** panel, choose the required file and click **Replace**.

Assign coauthors to author the documents as a group

To author a document as a group, you can assign users as *coauthors* to the document. By doing so, you work in a collaborative environment where all assigned coauthors can author the document at the same time and give real-time feedback.


Note:

The steps to assign coauthors are not applicable to Google Docs, Google Sheets, and Google Slides.

To author documents as a group:

1. In Teamcenter, open the document revision that contains the required document (dataset).
2. In the **Overview** tab, under **Files**, select the document.

The document is displayed in the **Viewer** work area.

3. Click **Assign Coauthors** .
4. In the **Assign Coauthors** panel, select the required coauthors and click **Assign**.


Author documents with coauthors simultaneously

You assign users as coauthors so that you can author a document simultaneously with them in real time.

Note:

The steps to coauthor documents are not applicable to Google Docs, Google Sheets, and Google Slides.

To coauthor a document:

1. In Teamcenter, go to your **Inbox** .
2. Open the group author task.
3. In the **Overview** tab, under **Files**, select the document.

The document is displayed in the **Viewer** work area.

4. Start authoring. The information you enter is saved automatically.

Tip:

You can use the Microsoft Office features to author content. For a detailed list of features, see <https://docs.microsoft.com/en-us/office365/servicedescriptions/office-online-service-description/office-online-service-description>.

Similarly, the other authors:

- Open the document simultaneously from their inboxes.
- Add their content.

All the coauthors can view the content of other coauthors in real time.

Edit documents

You can edit documents:

- **Within Active Workspace** if Teamcenter Office Online or Teamcenter Google Online is configured at your site.

OR

- **In Microsoft Office applications installed on your computer.** For this, ensure that Teamcenter Client for Microsoft Office and Active Workspace Launcher are set up on your computer.

Edit documents within Active Workspace




1. If Microsoft Office Online Server is integrated with Teamcenter, search for the documents that you wish to edit. You can also search for the document revision that contains the documents.
2. If you searched for multiple documents, select one document at a time to edit.

If you searched for a document revision, click each document in the **Files** section of the **Overview** tab.



The **Viewer** panel displays the document.

Note:



The **Viewer** panel cannot display PDF files that contain Acrobat forms. The displayed error message is incorrect.

3. Choose **More Commands...** > **Edit** > **Checkout** .
4. Make the required changes to the document and choose **More Commands...** > **Edit**  > **Checkin** .

You can use the Microsoft Office features for editing the Office files. For a detailed list of features, see the Microsoft Office documentation for your Microsoft Office channel in your organization.

If you do not want to save the changes, choose **More Commands...** > **Edit**  > **Cancel Checkout** .

Edit documents in Teamcenter Client for Microsoft Office

1. Search for the document revision that contains the document attached as a file.
2. Click the document revision.
3. If the selected file is a Microsoft Office (Word, Excel, or PowerPoint) file, click **Open**  > **Open in Office Client**  to edit the file in the appropriate Office application.

The **.awoai** file is downloaded and you are directed to log on to Teamcenter.

Note:

In order to edit the Microsoft Office file, ensure that the Active Workspace Launcher (**TcClientAppLauncher**) and the Client for Office Add-in applications are already installed on your computer.

4. If the Teamcenter Log on screen does not appear, right-click the **.awoai** file > **Open with** and then locate Active Workspace Launcher (**TcClientAppLauncher**).

The default installation location of Active Workspace Launcher is *C:\Program Files (x86)\Siemens\Teamcenter\WSLauncheri*. You can click the **Always** button to always open the **.awoai** file in Active Workspace Launcher.

5. Log on to Teamcenter.

The application window is displayed, depending on the type of document you selected, such as Word or PowerPoint.

6. Update the document.
7. If you want to access the access the **Teamcenter** functionality, click the **Teamcenter** tab.
8. After the document is updated, save it into Teamcenter. Additionally, you can close the file and confirm the save and check-in using the dialog box.

For more information about Teamcenter Client for Microsoft Office, see *Teamcenter Client for Microsoft Office* in the Teamcenter documentation.

View documents

To view the files attached to a document revision:





1. Open the document revision.



The file is displayed in the **Viewer** section. You can view:

- Microsoft Office files if your administrator has set up Teamcenter Office Online.
- Google Docs, Sheets, and Slides if your administrator has set up Teamcenter Google Online.

Note:

The **Viewer** panel cannot display PDF files that contain Acrobat forms. The displayed error message is incorrect.

2. If you are viewing the document in the **Viewer** panel and you want to change the orientation of the displayed file, in the **Viewer** panel, click **Rotate Clockwise**  or **Rotate Counterclockwise** .
3. If the selected file is a Microsoft Office file (for example, Word, Excel, or PowerPoint), click **Open**  > **Open in Office Client**  to open the file in the relevant Office application. If you open the file in the Office Client, you can use all editing features.

If the selected file is a PDF file, click **Open**  > **Open in Acrobat for View and Markup**  to open the PDF file in Acrobat Reader installed on your computer.

The **.awoai** file is downloaded in the browser.

Note:

In order to open the Microsoft Office file in the desktop version of the Microsoft Office application, ensure that the Active Workspace Launcher (**TcClientAppLauncher**) and the Client for Office Add-in applications are already installed on your computer.

In order to open a PDF file, ensure that the Teamcenter Client Acrobat Launcher (**TcAcrobatLauncher**) and Teamcenter Acrobat/Reader Plug-in for Acrobat applications are installed in addition to Active Workspace Launcher (**TcClientAppLauncher**) on your computer.

4. If you are opening the file for the first time on your computer, right-click the **.awoai** file > **Open with** and then locate the Active Workspace Launcher (**TcClientAppLauncher**).

The default installation location for Active Workspace Launcher is *C:\Program Files (x86)\Siemens\Teamcenter\WSLauncheri*. You can click the **Always** button to always open the **.awoai** file in Active Workspace Launcher.

After locating Active Workspace Launcher, the Teamcenter sign in dialog box is displayed.

5. Log on to Teamcenter.




The appropriate application window is displayed, depending on the type of document you selected, such as Word, PowerPoint, or Acrobat Reader.

Insert a cover page in a PDF document

You can insert a cover page in a PDF document, if the cover page is set by your administrator. It is available as a *dataset* within the document revision that contains the PDF document.

To insert the cover page:

1. Search for the document revision that contains the PDF document.



2. Click **Open**  to open the document revision. You can view the attached documents in **Files** in the **Overview** tab. You must ensure that there are two PDF documents. One of these PDF documents is the cover page.
3. To insert the cover page in the PDF document:
 - a. Choose **More Commands** **...** > **Manage**  > **Submit to Workflow** .
 - b. In the **Submit to Workflow** panel, select the appropriate task to insert the cover page in **TEMPLATE**, and click **Submit**.

Convert files into PDFs

You can convert files attached to a document revision into PDFs provided your administrator has configured rendering a document into a PDF file format. However, a PDF is not generated:

- If the document revision is in a *released* state and has a derived PDF.
- If the document revision is not released but its attached file is released and has a derived PDF.

To generate a PDF:

1. Search for the item revision containing the files you wish to convert.
2. Select the file and choose **More Commands** **...** > **Share**  > **Generate PDF** .

A notification is generated after the files are converted into PDFs. Click the notification to view the rendered PDFs in the **Viewer** panel.

If you had selected a file attached to a document revision, on clicking the rendered PDF in the notification, the PDF opens in a separate window. To save and relate the PDF with the document revision, click **Add To**.




Track and view the markups history using disposition reports

You can generate a disposition report to create a historical record of markups that were added to a document or drawing, and you can download the report in XLSX or HTML format.

Public disposition reports — A public disposition report contains only public markups that were added to a document or drawing. Public disposition report also contains links to source documents and drawings, making it convenient to navigate back to them. A user can create, view, and download a public disposition report if they have the read permission for the relevant source document or drawing.

Private disposition reports — A private disposition report contains private markups that you added to the document or drawing, as well as any public markups that you or others added. The user who generated the private disposition report can view and download it.

Procedure

1. Open the document revision that contains the file with markups, and then select the file.
2. Choose **More Commands**  > **New**  > **Generate Report** .
3. In the **Generate Report** panel, perform one of the following tasks:
 - To view the public markups that were added to the document or drawing, click **Public Disposition Report**.
 - To view the private markups that you added to the document or drawing, as well as any public markups that you or others added, click **Private Disposition Report**.
4. (Optional) For the private disposition report, specify a file name in the **Save to File Name** box.

Tip:

To generate the report asynchronously, select the **Run in Background** check box.

5. (Optional) Select the style sheet and locale for the disposition report.
6. Click **Generate**.

An alert notification appears after the disposition report generates.

7. Perform the relevant action:
 - To access your saved or generated private disposition report, go to the **PRINTOUTS** tile, the **Reports** tile, or the **Newstuff** folder.
 - To access the public disposition report, go to the **Disposition Reports** section in the **Overview** tab of the document revision.

The **Disposition Reports** section shows the following information: the disposition report name, the file type of the generated report, for example, HTML, and the original document name.


Search and navigate the Teamcenter database from Microsoft Office

You can search and navigate for Teamcenter objects, such as parts or designs, while working in a Microsoft Office application.

Example:

While working in Microsoft Word, you want to search for a Word document that is attached to a Teamcenter part. Open the attachment in Word, make changes to the document, and save the document to the part in Teamcenter.

To search and navigate:

1. On the Microsoft Office application **Teamcenter** tab, click **Search**  .
2. In the **Advanced Search** window, click the **Active Workspace** tab to access the Active Workspace **Search** panel.
3. Search for the desired Teamcenter part or design.
4. (Optional) Open and edit a document, or save a document to Teamcenter.

4. Marking up files

About marking up files

Multiple users can use markups to collaborate in the document review process and track the progress of this collaboration. They can mark up files in formats such as PDF, Text, HTML, and MP4, and 2D image documents in formats such as, JPEG, PNG, GIF, animated GIF, SVG, and BMP. Files can be marked up by **highlighting text**, **adding freehand drawings**, **using predefined shapes**, and by using many other tools.


As the document author, you can later **view**, **update**, and **print** these markups. Reviewers can **reply** to the markups, if required.



Markups that are made in PDF files in the rich client by using the Adobe Acrobat plugin can also be viewed in Active Workspace. However, you cannot modify these markups. Also, the markup looks different in Active Workspace from the ones created in the rich client. Siemens Digital Industries Software recommends that you create any new markups in Active Workspace. However, you cannot view these markups in the rich client.

Role descriptions and permissions for marking up files

Your role in the review process determines the tasks that you can perform while marking up files. Your administrator defines the Teamcenter access privileges for your role. Depending on your access privileges, you can assume different roles when working with one file.

For example, as a user with write privileges, you can perform author tasks or the reviewer tasks. In this case, your role depends on how you open the document.

Role	Tasks	Access privileges	How to open the file	How to view or save markups
 Author Creates and edits the file and manages markups.	<ul style="list-style-type: none">• Add, modify, and remove markups.• Add or clear markup comments from a file.• Revise the file to incorporate the markups added by the reviewers.• Reply to the markups added by the reviewers	<ul style="list-style-type: none">• Write and Markup access for datasets.	<p>Open the file in the universal viewer or the rich text editor.</p> <p>In viewers where markups cannot be modified, the author takes</p>	Markups are automatically displayed and saved.

Role	Tasks	Access privileges	How to open the file	How to view or save markups
	and change the disposition status accordingly.		on the role of a reviewer.	
 Reviewer Adds markups as a member of the review team.	<ul style="list-style-type: none"> • Add markups and edit their existing markups. • Reply to the markups added by other reviewers and change the disposition status accordingly. <p>Reviewers cannot modify the markups added by other users and cannot modify the contents of the file that they are marking up.</p>	<ul style="list-style-type: none"> • Read and Markup access for datasets. 	Open the file in the universal viewer.	Markups are automatically displayed and saved.
 Reader Reviews the file for informational purposes.	<p>View the file contents and the markups.</p> <p>Readers cannot:</p> <ul style="list-style-type: none"> • Add markups. • Modify markups added by other users. • Edit the file content. 	<ul style="list-style-type: none"> • Read access for datasets. • No Markup access for datasets. 	Open the file in the universal viewer.	Markups are automatically displayed.

Mark up files


You can mark up files and collaborate with multiple users in the document review process. The highlighted text is supported in the PDF and HTML viewer. The freehand markup, GD&T symbols, welding symbols, and leader lines are supported in the PDF and image viewers. You can also **add markups to a PDF file in Adobe Acrobat**.

When you check out and check in a document, a new PDF file is rendered. Suppose that you added markups to an already rendered PDF file, and then you check out and check in the document. In this case, a new PDF file is rendered, and the markups that you added to the previously rendered PDF file are removed. If you want to retain the markups, revise the document when you edit. A new PDF is rendered after the revision and contains the markups.

Note:

After a document is checked out and checked in, refresh Teamcenter to view the recently rendered PDF file.

To markup the files:

1. Open the document revision that contains the file and select the file to view it in **Viewer** or **Preview**.
2. Click **Markup Panel** .

**Note:**

You can use the zoom (by using the middle mouse button) and the pan function to select a specific area to create the freehand markup.

3. Use any of the following types of markup:

- **Highlight text**

You can use the highlight tool to highlight text in a document.

- **Freehand drawings**

You can use freehand drawing to highlight a custom area of the document and then provide your feedback.

- **Rectangle, eclipse, or arrows**

You can use these shapes to highlight some part of the document and then provide your feedback.

- **Revision cloud**

You can use a special type of cloud-like edge to create a revision cloud shape. You can also apply revision cloud markup to an existing shape.

- **GD&T symbols**

You can use the GD&T symbols to communicate the accuracy and precision, and also to provide characteristics and dimensions of a feature.

- **Welding symbols**

You can use the welding symbols to convey information about a welding joint.

- **Leader lines**

You can use leader lines to insert a callout and then provide your feedback or share an idea.

- **Stamps**


You can use predefined stamps that indicate the state of the document. For example, insert the *Approved* stamp to indicate that the document is approved and does not require any changes to it.

4. In the **Markup** panel, enter appropriate information.

To perform the following action	Use the following option
Include text to add a note, provide feedback, or communicate ideas.	Type text in the Comment box of the Text tab.
To show all markup comments, no comments, or just the first line of the comments	Select an appropriate option in the Text Shown list of the Text tab. When adding a custom stamp, select Text Shown as First Line .
To specify the user roles who can access the comments.	Select an appropriate option in the Share list of the Text tab. For example, if you choose Authors , only document authors can read the review comments.
To save the markup as a stamp and reuse them as needed.	Select the Create My Stamp check box and enter Stamp Name .
To change the markup style.	Click the Style tab and choose styles as required.

5. For an animated GIF or a video, you can **mark up files using freehand drawings and predefined shapes, and by adding stamps**.
6. Attach an **image** to the markup.
7. Click **Create**.

Highlight text

Click **Highlight Markup**  and select the required text in your document.

VIEWER

gear_design PDF 23-Aug-2021 164 Kb

Show Markups Markup Panel Highlight Markup Freehand Markup Markup Shapes Stamp Panel Full Screen

1 of 1 80%


Number of Teeth:	Design Units:	Pressure Angle:
At least <input type="text"/>	<input checked="" type="checkbox"/> No Preference	<input checked="" type="checkbox"/> No Preference
No more than <input type="text"/>	<input type="checkbox"/> English	<input type="checkbox"/> 14.5°
	<input type="checkbox"/> Metric	<input type="checkbox"/> 20°
		<input type="checkbox"/> 25°

Specify:



- Overall gear ratio and number of different reductions and their gear ratios if multi-speed and the ratio tolerance.
- Size and envelope requirements.
- Weight restrictions**
- Input and output interfaces and dimensions.


Markup Close

Page	User	Date	Status
Filter			
PAGE 1			
	ed (ed)	Open 8/23/2021, 1:36:42 PM	Also mention material restrictions.
	ed (ed)	Open 8/23/2021, 1:38:15 PM	Verify the angle.
	ed (ed)	Open 8/23/2021, 1:39:22 PM	Cuts should not be less than 55.

If some text is already selected when you click **Highlight Markup** , it is automatically used for creating the markup.

Add a freehand drawing

1. Click **Freehand Markup**  and draw a shape in the document.
2. To accept the shape, click .

Click  to undo the drawing action.

VIEWER

gear_design PDF 23-Aug-2021 164 Kb


Show Markups Markup Panel Highlight Markup Freehand Markup Markup Shapes Stamp Panel Full Screen

1 of 1 80%


Markup Close

Page	User	Date	Status
Filter			
PAGE 1			
	ed (ed)	Open 8/23/2021, 1:36:42 PM	Also mention material restrictions.
	ed (ed)	Open 8/23/2021, 1:38:15 PM	Verify the angle.
	ed (ed)	Open 8/23/2021, 1:39:22 PM	Cuts should not be less than 55.

Insert rectangle, eclipse, or arrows for markups

1. Click **Markup Shapes**  and then select rectangle, ellipse, or arrow.
2. Place the cursor at the location where you want to add the markup and draw the selected predefined shape.

Insert revision clouds


1. Click **Shapes**  and then select **Revision Cloud**.
2. Place the cursor at the location where you want to add the markup, and draw a freehand shape.
3. Click the tick icon (✓) displayed for the shape.

The revision cloud is added for the shape that you drew.

Tip:

To add a revision cloud to an existing shape, select the shape, go to **Style** in the **Markup** panel, and then choose **Edge > Style > Cloud**.

Insert GD&T symbols

1. Click **Markup Shapes**  > **GD&T** and drag the cursor to create a line segment from the anchor point to the shape location.

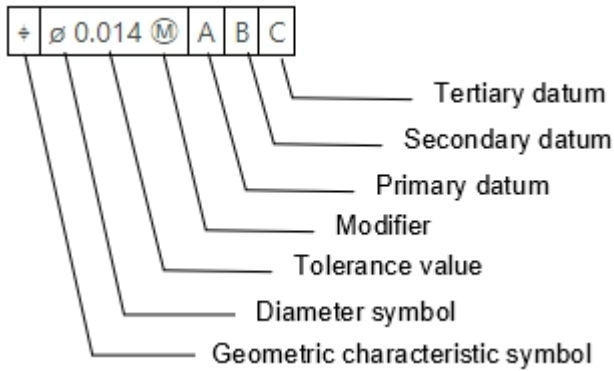
To add another segment, release the cursor and then drag again at the turning point.

2. In the **Markup** panel, add the GD&T symbols in the rows.

Tip:

Click **Add Row** to add a new row to the markup. Click **Add Grouped** to add a grouped row to the existing GD&T markup. Click **Remove Last** to delete the last row of the markup.

The following example shows you how to add the GD&T markup information:




3. Click **Create**.

Note:

You can move the two end points of a line segment independently. That is, when you modify an existing line segment, you can click one of the end points and then move it, while keeping the other end point in one spot.

Insert welding symbols

1. Click **Markup Shapes**  > **Welding Symbols** and drag the cursor to create a line segment from the anchor point to the shape location.

To add another segment, release the cursor and then drag again at the turning point.

2. In the **Markup** panel, add the welding symbols in the rows.

Tip:


To change a welding symbol, click another welding symbol. To remove a welding symbol, click the same symbol again.

3. Click **Create**.

Note:

You can move the two end points of a line segment independently. That is, when you modify an existing line segment, you can click one of the end points and then move it, while keeping the other end point in one spot.

Insert leader lines

1. Click **Markup Shapes**  > **Leader Lines** and drag the cursor to create a line segment from the anchor point to the shape location.

To add another segment, release the cursor and then drag again at the turning point.

2. In the **Markup** panel, add the comment.
3. If you want to align the markups, click **Centered** or **Underlined**.
4. Click **Create**.

Note:


You can move the two end points of a line segment independently. That is, when you modify an existing line segment, you can click one of the end points and then move it, while keeping the other end point in one spot.

Insert stamps

1. Click **Stamp Panel**.
2. In the **Markup** panel, drag the stamp that you want to include to a specific area in the file loaded in the viewer.

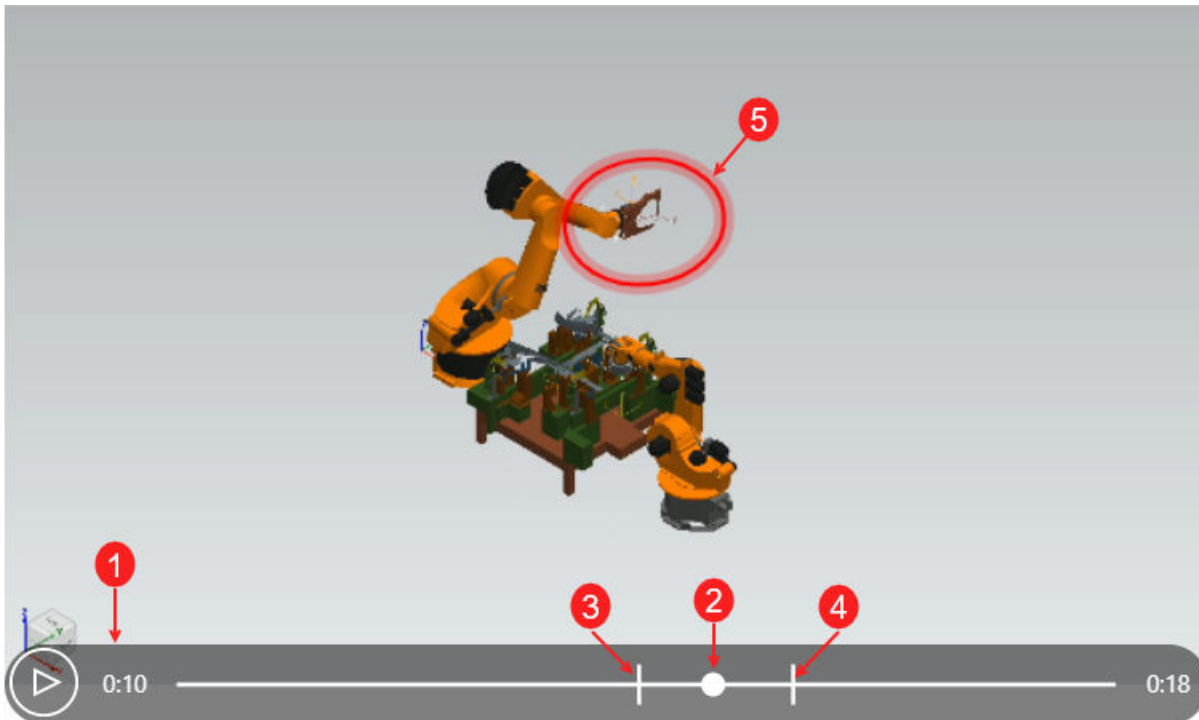
You can also choose from the shared stamps that the administrator created. If your site requirement is to follow a specific format for markups, you must use the stamps that the administrator created.

Attach an image to the markup

1. In the **Markup** panel, click in the **Comment** box.
2. Click **Insert Image** .
3. In the **Image Properties** dialog box, choose the image that you want to add as a stamp and click **OK**.

Mark up the animated GIF or video using freehand drawings and predefined shapes, and by adding stamps

1. Pause the play control before adding the markup.
2. Draw the shape or drag the stamp at the desired area and add your comments.



Annotation	Term
1	Play control
2	Seek handle
3	Vertical bar or tick indicating the start time of a markup
4	Vertical bar or tick indicating the end time of a markup
5	Markup (freehand or desired shape or stamp)

The animated GIF or video play control displays a vertical bar or tick representing the start and end time of the markup. When you play the animated GIF or video again, it stops automatically at the ticks. You can now drag the *seek handle* to adjust the start and end time of the markup to specify the correct area that you want to mark.

Tip:

If required, to indicate an area or movement showcasing the issue with the animated GIF or video, you can **add more vertical bars or ticks** between the start and the end time of the markup.

- When automatically paused, you can adjust the markup position, size, and rotation as required.

Mark up PDF files in Adobe Acrobat



You can open the PDF document in Adobe Acrobat and add markups.

You can also **add markups to a PDF document in Active Workspace**.

Prerequisites

- The **Teamcenter Client Acrobat Launcher** application must be installed.
- The client machine on which you want to open the PDF file for digitally signing must have the Adobe Acrobat DC or the Reader DC application.

Procedure

1. In Active Workspace, open the document revision that contains the file and select the file to view it in **Viewer** or **Preview**.
2. Click **Open**  > **Open in Acrobat for View and Markup** .

The *.awoai* file is downloaded.

3. Click the *.awoai* file to open Acrobat.

The Teamcenter window appears.

4. Enter the credentials to authenticate the Teamcenter user and then click **Login**.

The file opens in Adobe Acrobat.

5. Enter comments.

6. After entering comments in the Adobe Acrobat file, click **Save**.

Adobe Acrobat confirms that the markups are saved.

7. Click **OK** to save the markups to Teamcenter.

8. Close Adobe Acrobat.

The markups that you added are saved and can be viewed in Active Workspace.


View markups

In Active Workspace, you can view markups that were created in PDF files. However, you cannot modify these markups. Note that the markups may look different in Active Workspace than they do in the rich client. It is recommended that you create any new markups in Active Workspace. However, you cannot view these markups in the rich client.

Every time you check out and check in a document, a new PDF file is rendered for it. Suppose that you added markups to an already rendered PDF file, and then you check out and check in the document. In such a case, a new PDF file is rendered and the markups that you added to the previously rendered PDF file are removed. Thus, if you want to retain the markups that are added to a rendered PDF file, create a new revision of the document.

Note:




After a document is checked out and checked in, refresh Active Workspace to view the recently rendered PDF file.

1. Open the document revision that contains the file that you want to view.
2. In the **Files** section, select the desired file to view it in **Viewer** or **Preview**.
3. Click **Show Markups** .

Hover over a markup to view the markup text or stamp.


Alternatively, click **Markup Panel**  and in the **Markup** panel, select the markup that you want to view.

Edit markups

1. Open the document revision that contains the file with the markups.
2. In the **Files** section, select the file to view it in **Viewer** or **Preview**.
3. Click **Markup Panel** .
4. To edit a markup:
 - a. Select a markup and click **Edit Markup**  next to it.
 - b. Make the required changes.
 - c. To resize the markup, move the cursor outside the markup till the cursor icon changes to .

Press the left mouse button and drag inward or drag outward to resize the markup. While dragging, you can also rotate the markup to change its orientation.

You cannot resize GD&T markups.

- d. To move the markup to a different location in the file, move the cursor within the markup. When the cursor icon changes to , press the left mouse button and move the markup to the desired location.

- e. For an animated GIF or a video, if the markup does not follow the object movement correctly, you can add more vertical bars or ticks to the play control by double-clicking at a time between the start and the end time.


Note:

- A pair of ticks are at least 0.25 seconds apart. If you double click too close to the existing ticks, the new tick is not created.
- When automatically paused, you can drag the seek handle to adjust the time of the tick, including the start and the end ticks.
- When automatically paused, you can adjust the markup position, size, and rotation.
- To delete a tick excluding the start and the end ticks, double-click it.
- For a long duration video, if the ticks appear to be too close to each other, move the cursor on the play control and use the mouse middle button to zoom the time range.



- f. For stamp markups, you can perform various styling operations such as highlighting the stamp text, changing the font and font size, and so on.

- g. Click **Save**.

5. To delete a markup:

- a. Select a markup and click **Delete Markup**  next to it.
- b. Click **Delete** to delete the markup or **Cancel** to retain it.

Print markups

1. Open the document revision that contains the file with the markups.
2. In the **Files** section, select the file to view it in **Viewer** or **Preview**.
3. Click **Markup Panel** .
4. Select the markups that you want to print, and click **Print Markups** .

If you do not select any markup, all the markups are printed.




5. In the print preview page, click **Print**.

Note:

Based on the printer options set up by your organization, on the **Print** page, you can choose to save the selected markups or all markups as a PDF.

Reply to markups

After you (the author or reviewer) receive review comments, you can perform the necessary actions and reply to the comments accordingly. To do so:

1. Open the required document. You can view the document in **Preview**.
2. Click **Markup** .
3. Select the markup to reply to and click **Reply** .
4. Click **Reply** .
5. Type a reply.

The original markup and your replies are grouped in a conversation (thread). Markups grouped by conversation have the same status, and these are based on the last replied-to markup.

6. Choose from the list of options relevant to the markup in **Status**:
 - If you are answering a question, choose **Replied**.
 - If you have resolved the issue, choose **Resolved**.
 - If you do not intend to address the issue, choose **Rejected**.
 - If you have reconsidered an issue you previously rejected and now want to address it, choose **Reopened**.
7. Specify who can read the comments in **Share**. For example, if you choose **Users**, the comments can be read only by the users that you have chosen from the list of users.
8. Click **Reply**.



Track and view the markups history using disposition reports

You can generate a disposition report to create a historical record of markups that were added to a document or drawing, and you can download the report in XLSX or HTML format.

Public disposition reports — A public disposition report contains only public markups that were added to a document or drawing. Public disposition report also contains links to source documents and drawings, making it convenient to navigate back to them. A user can create, view, and download a public disposition report if they have the read permission for the relevant source document or drawing.

Private disposition reports — A private disposition report contains private markups that you added to the document or drawing, as well as any public markups that you or others added. The user who generated the private disposition report can view and download it.

Procedure

1. Open the document revision that contains the file with markups, and then select the file.
2. Choose **More Commands** **...** > **New**  > **Generate Report** .
3. In the **Generate Report** panel, perform one of the following tasks:
 - To view the public markups that were added to the document or drawing, click **Public Disposition Report**.
 - To view the private markups that you added to the document or drawing, as well as any public markups that you or others added, click **Private Disposition Report**.
4. (Optional) For the private disposition report, specify a file name in the **Save to File Name** box.

Tip:

To generate the report asynchronously, select the **Run in Background** check box.

5. (Optional) Select the style sheet and locale for the disposition report.
6. Click **Generate**.

An alert notification appears after the disposition report generates.

7. Perform the relevant action:
 - To access your saved or generated private disposition report, go to the **PRINTOUTS** tile, the **Reports** tile, or the **Newstuff** folder.
 - To access the public disposition report, go to the **Disposition Reports** section in the **Overview** tab of the document revision.

The **Disposition Reports** section shows the following information: the disposition report name, the file type of the generated report, for example, HTML, and the original document name.

Provide markup privileges to specific groups and users

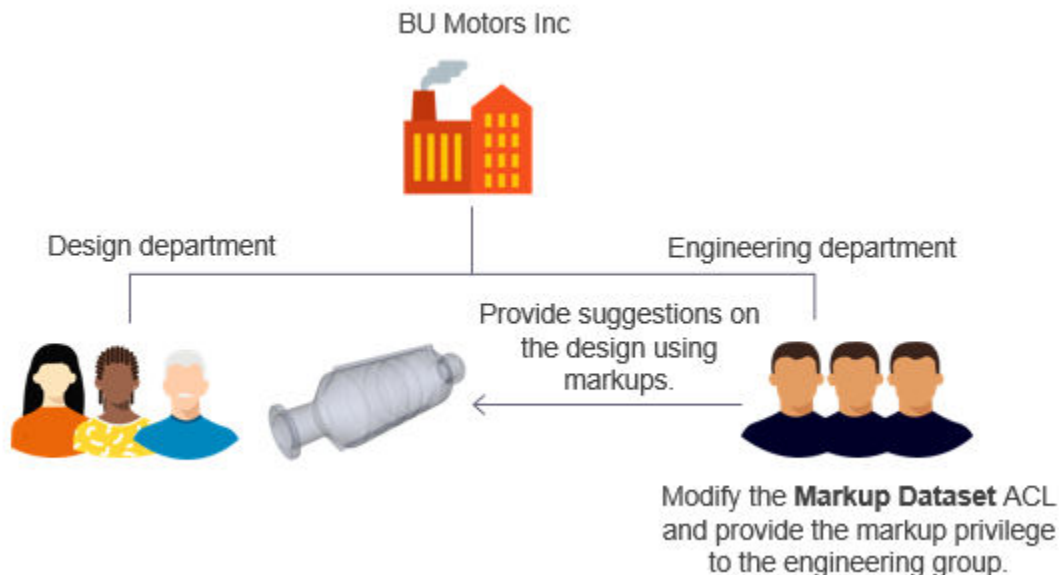
When you create a document in Teamcenter, all users from your group can mark up that document by default. However, users from other groups might be required to markup the documents, depending on the business requirement. In such a case, you can use one of the following approaches to provide the markup privileges to users from other groups.

- Request that the administrator modifies the **Markup Dataset** access control list (ACL) so that all users from another group can mark up the document.
- Request that the administrator provides the markup privilege to all users who are a part of a workflow using Active Workspace or rich client. The users can be from different groups.

If you want to provide markup privilege to only one user who is from another group, you can grant the markup privileges directly from rich client.

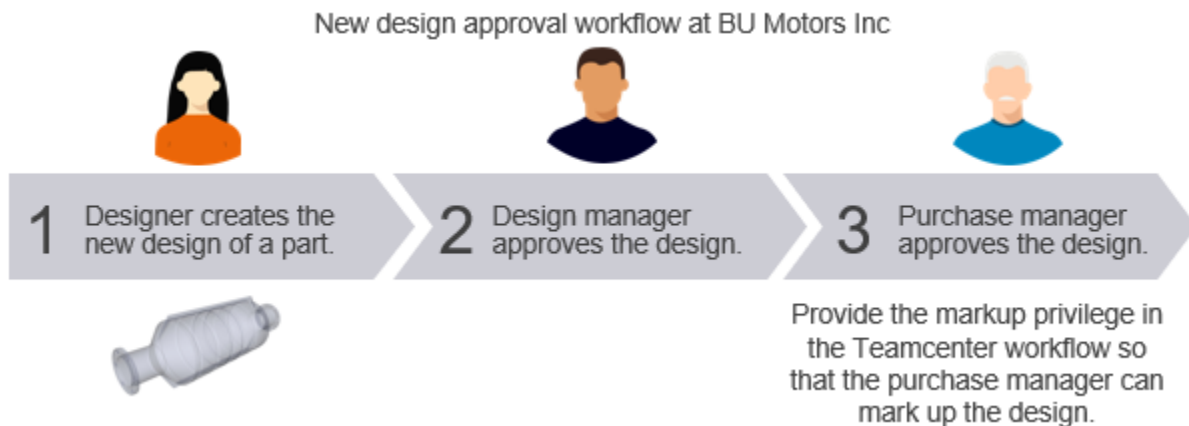
Example: providing the markup privilege to all users of another group

In BU Motors Inc., the designers create the 3D drawings and designs, and then they seek suggestions and comments from the engineering department for better collaboration. Because the engineers are from another group, they cannot provide suggestions and comments on the designs. In such a scenario, the designers can ask an administrator to modify the **Markup Dataset** access control list (ACL) and then to provide the markup privilege to the *Engineering* group. This way, all engineers can markup the 3D drawings and designs created in Teamcenter.



Example: providing the markup privilege to all users who are a part of a workflow

In BU Motors Inc., the purchasing manager always provides suggestions and also approves the new design of the part. By using this company-specific process, BU Motors Inc. ensures that the raw material required for manufacturing the new part can be procured within a reasonable time frame. Because the purchasing manager is from another group, the designer can ask an administrator to modify the required Teamcenter workflow and then to provide the markup privilege to the purchasing manager. This way, all users who are involved in the workflow can markup the documents.



Example: providing the markup privilege to a specific user for a document

Suppose that a designer in the BU Motors Inc. has designed a new part and wants the manufacturing manager to provide the suggestions on the new design. In such a scenario, the designer can provide the markup privilege to the manufacturing manager for this part design only.



Create custom markup symbols using the SVG editor

You can create your own custom markup symbols that are specific to your company or industry by using the SVG editor in Teamcenter.

Procedure

1. Open an image or a PDF file so that it is displayed in **Viewer**.

2. To make the **Symbols** command available, click **Edit Markups**.
3. Click **Symbols**, and then click **Create Symbol** ⊕.
4. In the **Create Symbol** section, enter a name for your symbol.
5. From the **Symbol Group** list, select a symbol group to which the new symbol is to be added.

The default symbol group is **My Symbols**.

6. Click **Create**.

If you are using the SVG editor for the first time, a message asks you where to store SVG preferences and content: both stored locally, only preferences stored locally, or neither stored locally.

7. Select an option and click **OK**.

A blank canvas is displayed.

By using the various tools available in the SVG editor, you can create a symbol. Additionally, you can add text to the symbol and edit or delete the text. You can change the color of the symbol and of the text within it. Also, you can scale, pan, zoom, and rotate the symbol.

8. When finished making the changes to the symbol, click **Save**.

Your changes are saved and the symbol is displayed in the **Symbols** panel under the group that you selected previously.

Results

You can drag the symbol onto the PDF or image that is displayed in the **Viewer** panel. Alternatively, you can choose a symbol from another group to which you have access. Also, you can import SVG files as symbols when you create a new group.


Modify a symbol using the SVG editor

You can modify a symbol using the SVG editor. You can also modify imported symbols that you own.

Restrictions and limitations

You cannot modify any symbols in a public group.

Procedure

1. In the **Symbols** panel, from a symbol group, select the symbol that you want to modify.
2. Click **Edit** .
3. In the **Edit Symbol** section, change the symbol name and symbol group, if required.
4. Click **Edit**.


The symbol is opened in the SVG editor.

5. Make changes to the symbol as required, and then click **Save**.

Create a private symbol group

As a document reviewer, you can create private symbol groups to organize your symbols. Only you can view the private symbol group that you created. You cannot view the private symbol group that is created by another document reviewer.

Procedure

1. In the **Symbols** panel, click **Create Group** .
2. In the **Create Group** section, enter a name for the group in the **Group Name** box.
3. Click **Choose File** to select and add symbol files to the group.
4. Click **Create**.

In the **Symbols** panel, the symbols that you selected are displayed under the group that you created.

5. Applying a PKI digital signature on Teamcenter object

What is a PKI digital signature?

A *Public Key Infrastructure (PKI) digital signature* is a mathematical stamp applied on an object and is used to indicate if the object was modified after the signature was applied. This also identifies the user responsible. Applying the digital signature requires PKI authentication.

The PKI digital signature is not the same as *digitally signing* a PDF file.

In Teamcenter, you can apply digital signatures to **PDF files** and to **Teamcenter objects**. To apply digital signatures to Teamcenter objects, you must use a browser that supports Microsoft .NET Framework 4, which is available from Microsoft. You must also ensure that the PKI digital signature is set up, configured, and enabled.

Apply a valid PKI digital signature to Teamcenter objects

You can directly apply a PKI digital signature on a workspace object (if so configured) to establish authenticity and integrity between data and users. The PKI digital signature acts as a stamp on a workspace object, indicating whether it was modified.

You must ensure that the PKI digital signature is set up, configured, and enabled for applying it on Teamcenter objects.

A digital signature does not signify a user's approval of an object; it is intended only as a mathematical check on the state of the data entered.

After applying a digital signature on an object, a user can either revise or version the object to a new copy to modify the object.

Before you can apply a valid PKI digital signature, you must:

1. Insert your smart card, and click **OK**.
2. Enter your PIN.

To apply a digital signature:

1. Choose the relevant object.
2. Click **Add** ⊕ in the **Signatures** section.

3. Select a certificate and click **OK**.

The digital signature is applied.

There are two states of PKI digital signatures:

- Valid


Indicates the key used in the digital signature computes correctly. This implies that the workspace object was not modified.

- Void

Indicates that the workspace object that was once digitally signed has been modified. A void action on a digital signature always contains details about the user who signed or voided the signature and when, ensuring full legal traceability for the object, to the point of the void.

Void a PKI digital signature

A void action on a digital signature indicates that the workspace object that was once digitally signed has been modified. A void action on a digital signature always contains details about the user who signed or voided the signature and when, ensuring full legal traceability for the object, to the point of the void.

1. Select the valid signature that you want to void and click **Void** .
2. Verify your certificate.
3. In the **Void Signature** dialog box on the right, type your comments as to why you want to void the digital signature and click **Void**.

The signature area now shows the digital signature as voided.

You can view the comments associated with the voided signature by clicking the owner name under the **Signature** label.

Set your browser settings to automatically download the .awoai file

You may need to update your browser settings to automatically download the *.awoai* file to the default location while adding digital signatures to PDF files.

Google Chrome

1. In Chrome, click **Settings > Advanced > Downloads**.

2. Turn off the **Ask where to save each file before downloading** setting.

Mozilla Firefox




1. In Firefox, click **Options > General > Files and Applications**.
2. Select the **Save files to** option.


Microsoft Edge (Chromium)


1. In Edge, click **Settings > View Advanced Settings > Downloads**.
2. Turn off **Ask me what to do with each download**.

6. Digitally signing PDF files

Digitally sign a PDF file using a PKI digital signature

1. Search for the PDF dataset or search for the document revision that contains the PDF dataset.
2. Select the PDF. It opens in the **Viewer** pane
3. Choose **More Commands**  > **Manage**  > **Sign PDF** .
4. Draw a rectangular box in which you want to place the signature.

To reposition the box, click .

5. Click  to proceed with the digital signing.

An *.awoai* file is created.

Tip:

To automatically download the *.awoai* file, you may need to **change your browser settings**.

6. Double click the downloaded *.awoai* file to open it in the **Document Management Teamcenter Client PDF Sign** application.


Warning:

If the Teamcenter log on screen is not displayed, it implies that either **Document Management Teamcenter Client PDF Sign** is not installed correctly or there is some issue related to your environment. To resolve the issue, contact your administrator.

7. Enter the user credentials to log on to Teamcenter. You need to log on only once if single sign on (SSO) is enabled at your site.
8. Insert your smart card, and click **OK**.
9. Enter your PIN.

After you enter your PIN, the signature is included in the PDF file. The **Sign PDF succeeded** message indicates that the PDF file with the signature is saved in Teamcenter.

To view the signed PDF in Teamcenter, click the notification or refresh the PDF.

If an error occurred or you were unable to complete the signing process, click **Manage**  > **Cancel Signature** to cancel the signing process.



Digitally sign a PDF file in Adobe Acrobat

PDF signatures are often used to designate user approval of a document on a PDF file. When a user digitally signs a PDF, a signature stamp is placed on the PDF file. A *digital signature* is a mathematical stamp on a document to indicate if the document was modified after the signature was applied. It also identifies who applied the digital signature.

Prerequisites

- The **Teamcenter Client Acrobat Launcher** application must be installed.
- The client machine on which you want to digitally sign the PDF file must have Adobe Acrobat DC or Reader DC.

Procedure

1. Open the document revision and select the file that you want to sign digitally.
2. Click **Open**  > **Open in Acrobat for Digital Signing** .

Teamcenter downloads the *.awoai* file.

3. Click the *.awoai* file to open Acrobat.

The Teamcenter window appears.

4. Enter the credentials to authenticate the Teamcenter user and then click **Login**.

The file opens in Adobe Acrobat.

5. In Adobe Acrobat, navigate to **Certificates** and click **Digitally Sign**.

6. Draw a rectangle where appropriate in the PDF file.

7. In the **Sign with a Digital ID** window, select a signature that you want to use and click **Continue**.

If the PKI digital signature is also set up for you, you can also choose the PKI authentication for digitally signing.

8. Enter the digital ID PIN or password and click **Sign**.




Adobe Acrobat confirms that the PDF file is signed.

9. Click **OK**.

7. Print documents

You can print documents with system stamps, watermarks, and user-specified stamps from Teamcenter without opening the documents in a native editing application. This printing functionality is called *batch print* in Teamcenter. Banner pages may also be also printed during a batch printing process. Your system administrator must configure batch printing for this to work. Banner pages usually contain prespecified information such as the user associated with and the time of the print job. These pages are inserted before the main sheets of a print job.

To print documents:

1. Select the document revision that you wish to print.
2. Choose **More Commands**  > **Share**  > **Print** .
3. In the **Print** panel, select **Files** to print the files attached to the document revision. If you do not choose this option, the metadata of the document revision is printed instead.
4. Enter the other required information and click **Print**.

8. Managing artwork

What is artwork?

Artwork represents the labels, images and any information included in copy. Artwork is designed for a specific layout. A layout is a structured arrangement of the various graphical elements such as logos and designs, and textual information. The layout, graphical elements, and other information that are valuable to a company are known as *digital assets*.

You can manage the digital assets created using Adobe Creative Cloud (Adobe CC) applications such as Photoshop, Illustrator, and InDesign in Teamcenter. You can also host Teamcenter in these applications. Hosting Teamcenter in Adobe CC applications embeds the Teamcenter menu in these applications.

Define colors, color palettes, and colorways to be used in artwork

In Teamcenter, you can create colors, color palettes, and colorways to be **used in artwork**. After **creating the colors, color palettes, and colorways**, you can **include them as swatches** in the Adobe CC applications (Illustrator, PhotoShop, and InDesign).

Create a color, color palette, or colorway

1. Open Teamcenter from within an Adobe application, for example, Illustrator.
2. In the **Teamcenter** tab, select a folder where you want to create the color, color palette, or colorway.
3. Click **New > Add**.
4. In the **Add** panel, in **OTHERS**, search for **Color**, **Color Palette**, or **Colorway**.
5. Enter the required properties and click **Add**.
6. Add the colors you want to include in the color palette by copying the colors to the color palette.

Include colors, color palettes, and colorways as swatches in Adobe CC applications

1. Open Teamcenter from within an Adobe CC application, for example, Illustrator.
2. In the **Teamcenter** tab, search for colors, color palettes, or colorways.
3. Drag the colors, color palettes, or colorways from Teamcenter to the Adobe application (example, Illustrator) window.

You can view these colors, color palettes, and colorways as swatches in **Windows > Swatches**.

Update artwork in Adobe applications

You can open artwork stored in Teamcenter in the work area of the host application, such as Adobe Illustrator, InDesign, or Photoshop, to add digital assets. To do so:

1. In Teamcenter, search for the artwork.
2. Open the relevant artwork by clicking **Open**  → **Send to Illustrator/Photoshop/InDesign**.

The artwork opens in the work area of the relevant Adobe CC application. Only **certain file types are supported** by each Adobe application.

3. In the **Teamcenter** tab, select the **Automatically generate a PDF during save?** check box and click **Apply**. On doing so, a PDF is automatically generated and is saved in the Teamcenter database when you save the artwork.
4. In Teamcenter, search for digital assets.
5. Select the digital asset that you want to add to the artwork and drag it to the work area of the Adobe application.

If the artwork is empty, the digital asset is added to it. Else, the digital asset is added as a new layer.

You can also drag multiple digital assets to the artwork. The digital assets are added to the artwork in the order of selection.

6. To add colors to your artwork, open the **Swatches** menu item and choose the required colors. You can choose from the colors that Adobe provides by default or you can choose colors that you created in Teamcenter. The colors that you created in Teamcenter are listed in:
 - **TC_Swatches**. Depending on the **Document Color Mode** option that you have chosen, the **CMYK** or **RGB** colors are displayed in **TC_Swatches** in **Windows > Swatches**.
 - The color palette that you created in Teamcenter.
7. To add patterns to your artwork, open the **Swatches** menu item and choose from the options listed in the colorway that you created in Teamcenter.
8. Make the required changes, and click **Save** to save the updates to Teamcenter.

You can view the autogenerated thumbnail image file and the PDF file in the **Attachments** tab of the artwork in the Teamcenter.

File type extensions supported by different Adobe applications

Adobe application	File types extensions supported
Illustrator	<ul style="list-style-type: none">• .ai• .ait• .eps• .pdf• .jpg• .cgm• .psd• .png
Photoshop	<ul style="list-style-type: none">• .pdf• .psd• .jpg• .png
InDesign	<ul style="list-style-type: none">• .indd• .jpg• .png• .psd• .txt• .xml• .ai