



TEAMCENTER

Document Management on Rich Client — Usage

Teamcenter 2412

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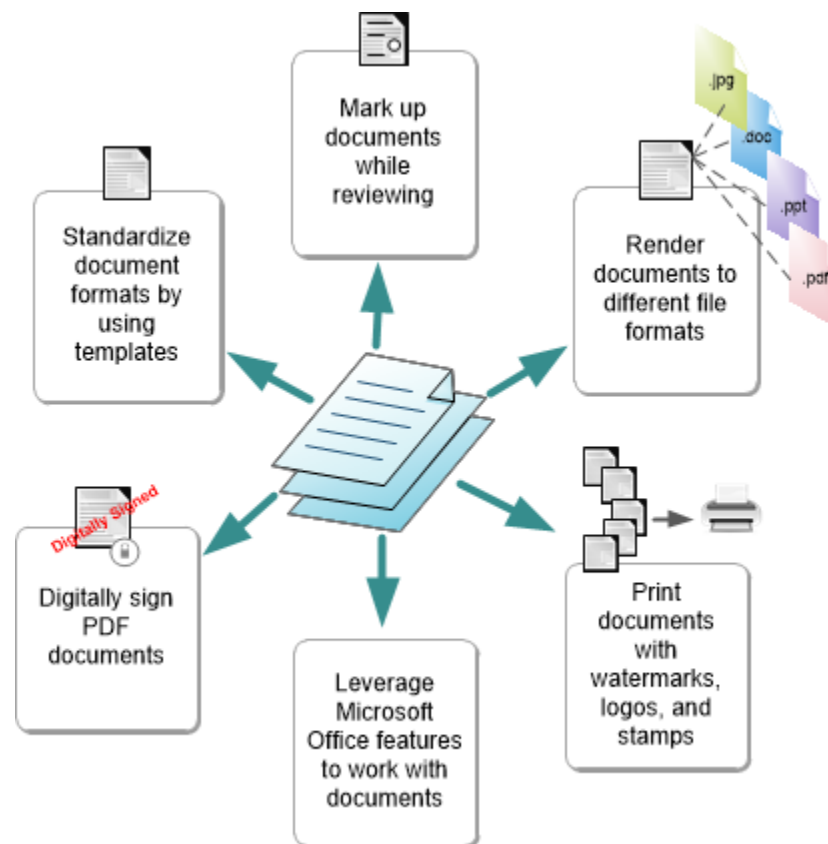
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1. Overview of Document Management

Documents play an important role in product data management. Documents that support the development efforts of a product must be maintained in sync with the development process. However, document authors manage documents in several different environments that have no connection to their product data. As a result, documents are often out of sync with the product information. Such misaligned processes cause companies to miss their product launch deadlines due to incomplete or improper documents, poor labeling, or incorrect regulatory filings. In some cases, even overabundance of documents affect the product release.

To ensure that documents conform to the required formats, meet product deadlines, and use the latest product information, you use Teamcenter Document Management.



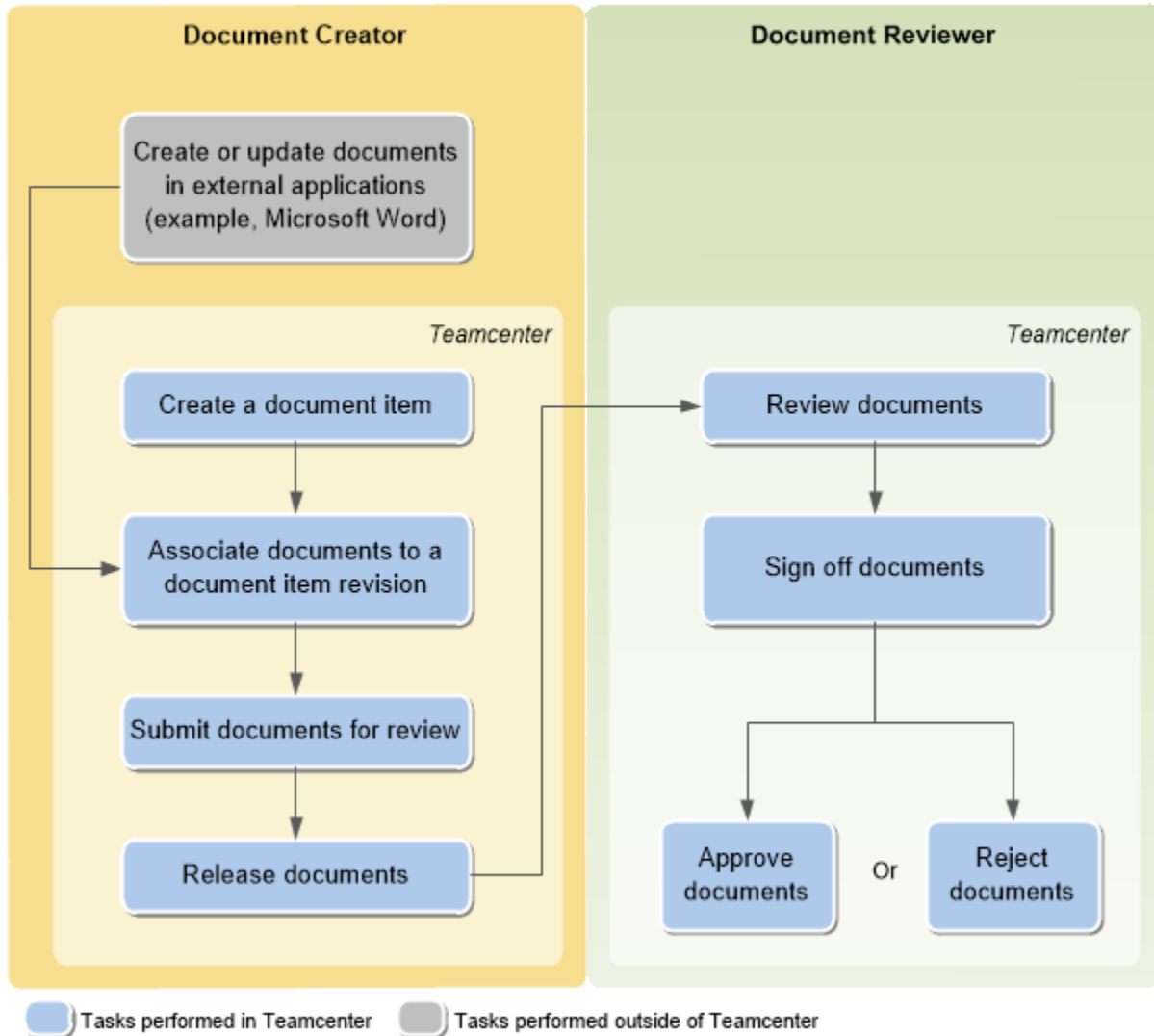
Using Document Management, you can:

- Standardize document formats by using templates for ease of authoring documents.
- Render documents to different file formats.
- Print documents with stamps such as watermarks, stamps, and logos to ensure proper distribution.
- Mark up documents for simultaneous reviews.

- Digitally sign PDF documents to secure them.
- Manage attribute exchange between Teamcenter and Microsoft Office documents by leveraging Teamcenter *attribute exchange* features. You can also manage the generic attribute exchange from Teamcenter to Microsoft Office documents by using logical objects.

2. Managing documents in Teamcenter

The flow of tasks to create and review documents



Create documents

To ensure that documents meet corporate and product deadlines, it is important that they are maintained within a PLM system such as Teamcenter. To implement this, you author your documents such as specifications or reports in applications of your choice. You then create a *document* object in Teamcenter as a container to hold all your content (text files, graphics and other multimedia files such as videos) and then attach these files to the Teamcenter *document*. This Teamcenter document is created based on the template objects that your administrator has created. For details about templates, see [About the sample BMIDE Document Management template](#).

You can author your content in any Microsoft Office application (for example, Microsoft Word). You can either save documents authored in a Microsoft Office application from the application itself or attach it as a dataset to a document revision in My Teamcenter.

Note:

To enable authoring a document in applications such as Microsoft Word, ensure that your administrator has configured Teamcenter Client for Microsoft Office.

To create a document in Teamcenter

1. In My Teamcenter, select the folder where you want to create the document container and click **File**→**New**→**Item**.
2. In the **New Item** dialog box, select **Document** and click **Next**.
3. Type a name and description for the document. Click **Assign** to generate an identification number.
4. Click **Next** twice.
5. Enter your name in **Document Author** and the title of the document in **Document Title**.
6. (Optional) In **Document Subject**, select the type of document that you want to author from the types your administrator has configured (for example, specification document). If your administrator has not configured any document types, you can enter information to describe your document.
7. Click **Finish** and then click **Close**.

The document is prepopulated with any attributes configured by your administrator in the template for that document type. For example, you can view the **Document Author** and **Document Title** attributes that you specified while creating the document.

8. Expand the document item and select the desired revision to attach your files.
9. Click **File**→**New**→**Dataset**.
10. In the **New Dataset** dialog box, click **More** on the left pane to select the document type from the list.
11. Click the browse button next to **Import** to locate the documents that you want to associate and click **Upload**.
12. Click **OK**.

You can also attach your files to an existing Teamcenter document:

1. Select the desired document in My Teamcenter.
2. Expand the document object to select the revision to attach your files.
3. Perform steps 9 through 12 to attach your files to the selected revision.

Once done, you may **send the Teamcenter document for review**.

Submit documents for review

1. Select the document revision that has the document that you wish to get reviewed.
2. Click **File**→**New**→**Workflow Process**.
3. In the **New Process Dialog** dialog box, select the appropriate template, set up by your administrator for the review process, in **Process Template**.
4. In the **Attachments** tab, select the document attached to the document revision and click **OK**.
5. Click **My Worklist**→**Tasks to Perform**.
6. Select the review task and click the **Viewer** tab.
7. Click **Users** under **Signoff Team**, choose reviewers from the **Users** list in the **Organization** tab, and click **Add**.

Similarly, click **Profile** under **Signoff Team**, choose reviewers from the **Users** list in the **Organization** tab, and click **Add**.

For each profile, select the specified number of users. For example, if a signoff profile is **Design Office/Architect/3**, select three users who are members of the **Design Office** group and who have the role of **Architect**.

8. Select the **Required** check box next reviewers who must review the document.
9. Enter information in **Process Description**.
10. Select the **Wait For Undecided Reviewers** and **Ad-hoc done** check boxes, and click **Apply**.

The task is complete and the **Viewer** tab now displays **No View Data Available**.

Review documents

You review documents to perform several checks, such as ensuring that it follows the correct format, contains accurate information, and displays the correct distribution statements.

To review documents:

1. In My Teamcenter, click **My Worklist**→**Tasks to Perform**.
2. Expand **Perform-signoff**→**Targets**.
3. Select the document revision and click the **Viewer** tab.

The document revision and the associated document are automatically checked out. You can view the contents of the document in the **Viewer** tab.

You can review the document here in My Teamcenter itself. To review it in an associated application, such as Microsoft Word, double-click the document available in the document revision.

4. After reviewing the document, right-click the checked-out document revision and click **Check-In/Out**→**Check In**.
5. In the **Checking-In** dialog box, select the reviewed document and click **OK**.

After checking in the document, you **sign off on the document** to either approve or reject it.

Sign off documents

1. In My Teamcenter, click **My Worklist**→**Tasks to Perform**.
2. Select the **Perform-signoff** task.
3. In the **Viewer** tab, locate the row that displays your **User-Group/Role**.
4. In this row, click **No Decision** under **Decision**.
5. In the **Signoff Decision** dialog box, choose **Approve** or **Reject**, as applicable, and click **OK**.

Update documents

You may update a document to update its properties or to update its content. You revise a document that is in the *released* state to update its properties.

Update document properties

1. In My Teamcenter, locate the document item that you want to update.
2. Expand the document item and right-click the document revision whose properties you wish to update and click **View Properties**.

3. In the **Properties** dialog box, click **Check-Out and Edit**.
4. In the **Checking-Out** dialog box, click **OK**.
5. In the **Edit Properties** dialog box, make the required updates and click **Save and Check-In**.

The document attached to the document revision is automatically updated with the properties that you specified in the **Edit Properties** dialog box.

Warning:

After an attribute's value is synchronized between Teamcenter and Microsoft Office, and later it is deleted in Teamcenter, the null value cannot be synchronized to Microsoft Office, so the attribute continues to have the previous value.

Update document content

1. Expand the document revision, select the document that you wish to update, and click the **Viewer** tab.

The document is automatically checked out and its content is displayed in the **Viewer** tab.

You can update the document here in My Teamcenter itself or double-click the document to update it in the associated application, such as Microsoft Word.

2. After updating the document, right-click the checked-out document revision and click **Check-In/Out**→**Check In**.

Revise documents

1. Select the document revision and click **File**→**Revise**.
2. In the **Revise** dialog box, update the required properties and click **Finish**.

On revising a document revision, a new revision is created. You can update the document content of the revised document revision. The document is prepopulated with the properties that you specified in the **Revise** dialog box.

Release documents

You release documents that are approved by the reviewers.

To release documents:


1. In My Teamcenter, select the document item revision that has the approved documents.

2. Click **File**→**New**→**Workflow Process**.
3. In the **New Process Dialog** dialog box, select **TCM Release Process** in **Process Template**.

Note:

The default value of the release status for Document Management template (*DMTemplate*) is **TCM Released**. This value is set to *MaturityStatuses* constant in BMIDE. You can customize it by adding a status type. You can also understand what are global constants, business objects constants, and how to run data model reports to understand the *MaturityStatuses* constant.

4. In the **Attachments** tab, expand **Targets** to select the document attached to the document item revision, and click **OK**.

A release flag  is displayed next to the released document item revision.

Track and view markup history using disposition reports

You can generate a disposition report to create a historical record of the 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 the public markups that were added to the document or drawing. Public disposition reports also contain 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.

1. In **My Teamcenter**, open a document, a document revision, or a dataset that has markups.
2. Right-click the document, the document revision, or the dataset, and click **Generate Report**.
3. In the **Report Generation Wizard** dialog box, perform one of the following steps:
 - 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. Click **Next**.
5. To save the report as a file, select the **Create Dataset** check box and type a name in the **Dataset Name** box.

Tip:

If you want the report to be generated in the background, select the **Run in Background** check box.

Note:

If you saved the report as a dataset, the report is attached to the object that you selected, such as a document, a document revision, or a dataset. Markup disposition reports that are attached to datasets are not visible in Rich Client.

3. Render documents to different formats

A document can be rendered to different file formats. For example, a Microsoft Word document (source dataset) can be rendered into a PDF file (presentation or derived format).

To render a document, select the document item revision and perform one of the following method:

- Click **Translation** → **Render Document**.
- Start a workflow process by clicking **File** → **New** → **Workflow Process**. In the **New Process Dialog** dialog box, select the appropriate process template, for example, *Render Document*.

The document attached to the document revision is rendered to an appropriate presentation format set by the administrator.

4. Marking up documents

Mark up documents

After the document creator creates or updates a document, you review it to verify that the information it contains is correct and complete. Multiple reviewers can review the document simultaneously to provide their feedback. While reviewing the document, the reviewer marks up the text changes so that the creator can accept or reject the comments accordingly.

You can mark up documents in Microsoft Word, Adobe Acrobat, or Acrobat Reader.

To launch the appropriate application for reviewing a document:

1. Select the document item revision or the dataset attached to it.
2. Click **File**→**View/Markup**.

The selected document item revision is launched in the associated application if the administrator has set up Microsoft Client for Office and Adobe Acrobat plugin at your site.

If the associated application is Adobe Acrobat or Acrobat Reader, you must first disable the protected view before adding the markups. To do so, refer to the steps specified at <https://helpx.adobe.com/acrobat/11/using/protected-view-feature-pdfs-windows.html>. You must also perform the following steps:

1. Open the PDF file and click **Edit**→**Preferences**.
2. In the **Preferences** dialog box, click **Documents**.
3. Select **Never** for **View documents in PDF/A mode**.
4. After marking up the document, click **Save**.

The markups are saved to a Adobe Forms Data Format (FDF) file. This file is uploaded to Teamcenter.

View documents recently opened for markups

- In **My Teamcenter**, click **Quick Links** → **My View/Markups**.

The document item revisions that you viewed recently by clicking **File**→**View/Markup** are displayed in the **My View Markup** dialog box.

Providing markup privileges to other users

Provide markup privileges to specific groups and users

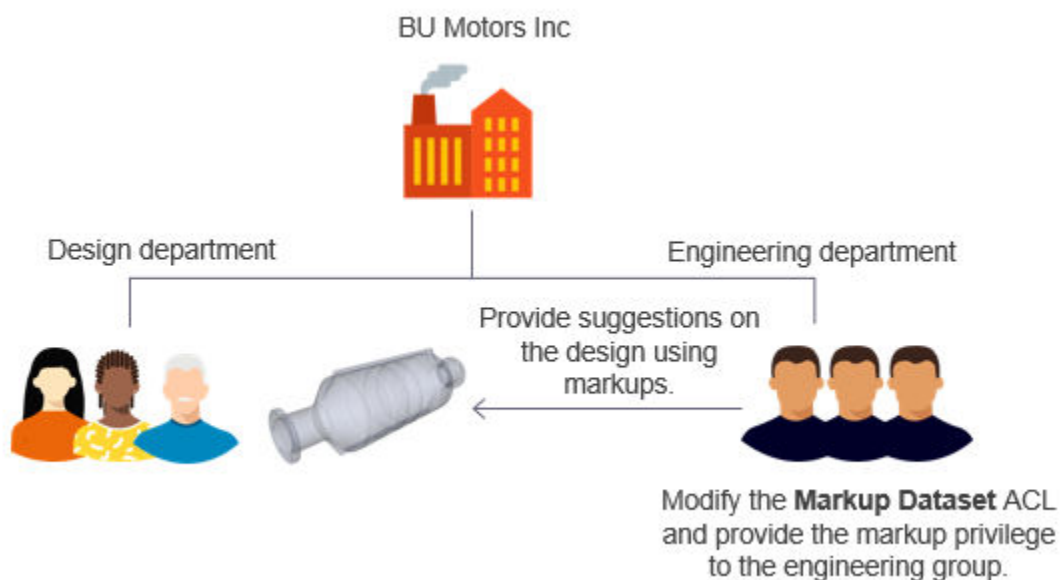
When you create a document in Teamcenter, all users from your group can mark up that document by default. However, users from other groups might be required to markup the documents, depending on the business requirement. In such a case, you can use one of the following approaches to provide the markup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

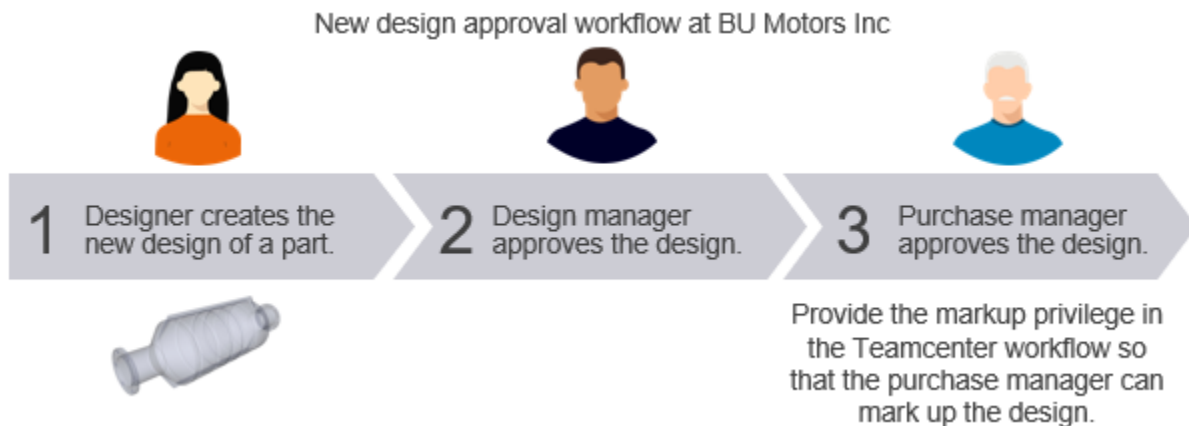
Example: providing the markup privilege to all users of another group

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.

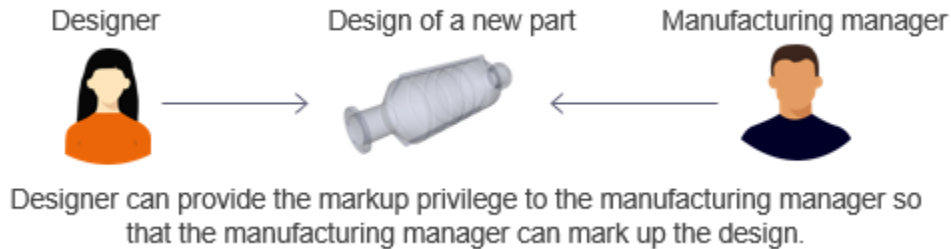


Provide markup privileges to another user

As a document owner, you might want a user from another group to review your document and provide markups. In such a situation, you can give the user markup privileges for that document.

Example:

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.

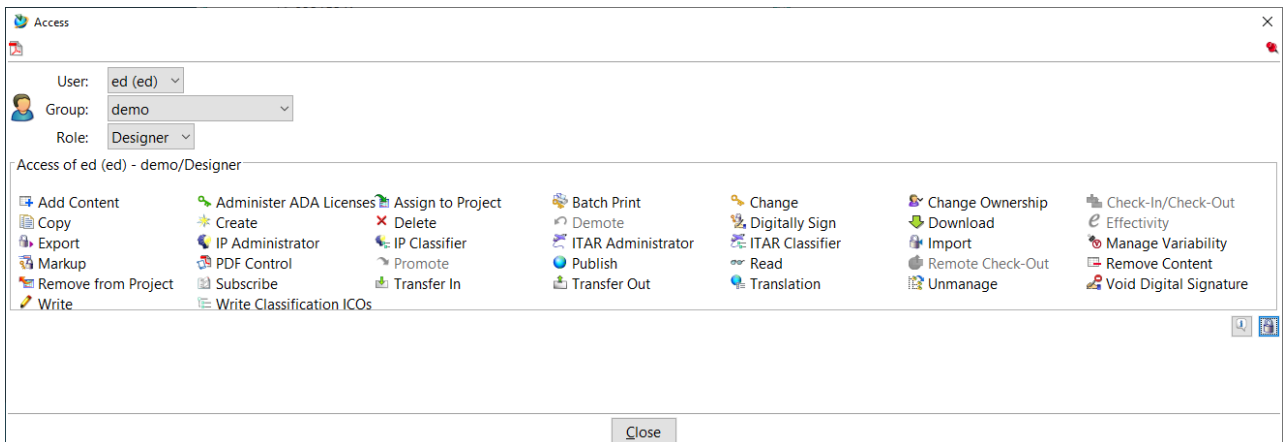



Procedure

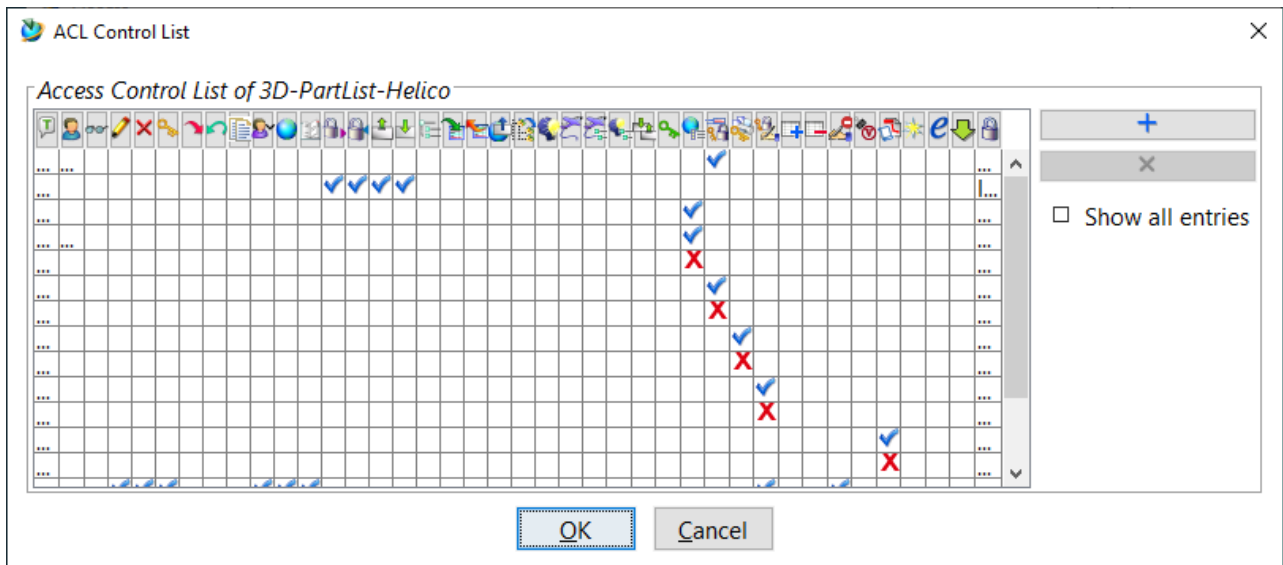
1. In Rich Client, navigate to a dataset to provide the markup privilege for it.


The dataset must be a PDF, an image, or an HTML file.

2. Right-click the dataset and click **Access**.




3. In the **Access** dialog box, click **Get access control list**  .



4. In the **ACL Control List** dialog box, click **Add access control list to ACL** .
5. In the last row of the **Type of Accessor** column, double-click to select a **User**.
6. In the **ID of Accessor** column, double-click to select an accessor.

When you double-click, the **Select Accessor** dialog box appears and allows you to select a stakeholder to whom you want to provide the markup privilege.

7. In the **Markup** column, double-click to select .
8. Click **OK** to close the **ACL Control List** dialog box.
9. Click **Close** to close the **Access** dialog box.

5. Digitally sign PDF documents

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. Digitally signing a document is different from applying digital signatures. 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. Applying the signature requires public key infrastructure (PKI) authentication.

Sign PDF documents from Teamcenter

To digitally sign a PDF file, click **File**→**Sign**.

If you sign a document containing markups, the markups are embedded in the signed document. You can sign only one document at a time. A document can contain only one signature.

To cancel a signature, right-click the signed PDF file and select **Cancel signing**.

Sign PDF documents from Outlook

1. From the Office application in Microsoft Outlook, navigate to and select the PDF file you want to digitally sign.
2. Right-click and choose **Sign**.
The document is checked out and is launched in Adobe Acrobat or Acrobat Reader.
3. Digitally sign the PDF document and click **File**→**Save**.
The signed document is checked in and the changes are saved in Teamcenter.

To cancel a signature, right-click the signed PDF file and select **Cancel signing**.

To view the digital signature history, right-click the PDF file and select **View Properties**. In the **Properties Display** dialog box, navigate to the **Signed by** property to display the list of users who digitally signed the PDF files.

6. Printing documents

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 as *batch print* in Teamcenter. Banner pages may also be also printed during a batch printing process. 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 batch print documents attached to a document item revision:

1. Select the document item revision and click **Tools**→**Batch Print**.
2. In the **Batch Print** dialog box, enter the following information:

Field	Description
Print Configuration	Displays the available print configuration objects.
Printer Name	Displays the name of the printer specified in the selected print configuration object.
Number of Copies	Specifies the number of copies to print. The value must be a positive integer between 1 and 99.
Collate	When two or more copies are printed, this check box specifies whether the printed pages are collated.
User Stamp	Specifies text for a user stamp to be applied in addition to any existing system stamps defined by the administrator.
Paper Size	Lists the available paper sizes as provided by the selected print configuration object.
Page Range	Specifies a range of pages to print.
Color	Specifies Color or Monochrome printing.
Print To Scale	<p>Specifies the scaling factor, from 0.000001 to 100.0, applied to an image when it is printed.</p> <p>With standard fit-to-page functionality, the image size is adjusted to fit the paper.</p> <p>When Print To Scale is used, the image is adjusted to the scale value:</p> <ul style="list-style-type: none">• A value of 1.0 implies that the image prints at a 1:1 scale factor. For example, a square image that measures 5 inches on each side is printed 5

Field	Description
	<p>inches per side on the paper, regardless of the paper size. If the paper size is smaller than 5 inches, the image is cropped.</p> <ul style="list-style-type: none"> • A value of 2.0 implies that the image prints at a 2:1 scale factor. In this case, a square image that measures 5 inches on each side is printed as a 10 inch image and cropped to fit the paper, if necessary. • A value of 0.5 reduces the printed image size so that an image measuring 5 inches on each side is printed 2.5 inches per side.
Print Stamp	Provides a list to specify whether the print stamp applies to the first page, the banner page, or all pages.
Orientation	<p>Specifies the paper orientation with the option best fit, portrait, or landscape.</p> <ul style="list-style-type: none"> • Best Fit <p>The image is rotated 90 degrees to the right, if necessary, so that the long side of the image matches the long side of the paper.</p> • Portrait <p>No rotation is performed.</p> • Landscape <p>By default, the image is rotated 90 degrees to the left.</p> <p>The default rotation direction can be configured in Lifecycle Visualization Print.</p>
Banner Pages	Specifies whether to print a page with the defined stamps and listing additional data as specified by the vvcp setup. You can choose from Off , Single , and All Files .

3. Click **Finish**.

File formats for printing

You can use the following table to:

- Review the list of supported input file formats.
- Verify the description for each file.

Input file extension	Description	Notes
907	Calcomp 906/907	None
951	Calcomp 951	None
adwf	AutoCAD DWF	Supported file types include AutoCAD 2004 through AutoCAD 2010. When you open a 2D file using a 64-bit operating system, 3D solids are not supported. The following types of embedded raster data are supported: BMP, JPG, GIF, MLR, TIFF, and PNG.
ai	Adobe Illustrator	None
bmp	Windows Bitmap	None
c4	JEDMICS C4	None
cc3	CCITT Group 3 Raster	None
cc4	CCITT Group 4 Raster	None
cgm	Computer Graphics Metafile	Supported file types include WebCGM and CGM V4.
dft	Solid Edge Draft	None
dgn	Microstation DGN	None
doc and docx	Microsoft Word document	You must install the native application to print these files.
dwg	AutoCAD DWG	Supported file types include AutoCAD 2004 through AutoCAD 2010. When you open a 2D file using a 64-bit operating system, 3D solids are not supported. The following types of embedded raster data are supported: BMP, JPG, GIF, MLR, TIFF, and PNG.
dxf	AutoCAD DXF	Supported file types include AutoCAD 2004 through AutoCAD 2010. When you open a 2D file using a 64-bit operating system, 3D solids are not supported. The following types of embedded raster data are supported: BMP, JPG, GIF, MLR, TIFF, and PNG.
emf	Enhanced Windows Metafile	None
etf	Encoded TIFF	None
gbr	Gerber	None
gif	GIF Color Image	None

Input file extension	Description	Notes
hpg	HP-GL Vector	None
idw	IDW Inventor	None
igs	IGES	None
jpg	JPEG Image	None
j2k	JPEG 2000 (j2k, jpc, and jp2)	You can use the command line parameter -monocolor or the Monocolor configuration file setting to force any input file type that supports color to monochrome output.
mdl	Vis View Model	None
mds	Vis View Meta Data Stamp	None
mlr	MIL-Raster 28002	None
mpp	Microsoft Project	Convert uses the native application to convert file formats using the external converter. These file formats are Microsoft Office applications such as MS Word. Siemens Digital Industries Software does not supply native applications. For MS Office files, Convert and Print cannot run as a Windows service.
pbm	Portable BitMap Image File	None
pct	Macintosh Paint Image	None
pcx	PC Paintbrush Image	None
pdf	Portable Document Format	None
pdfa	Portable Document Format – archiving	None
pgm	Portable GrayMap Image File	None
png	Portable Network Graphic	None
pnm	Portable Anymap	None
ppm	Portable PixMap image file	None
ppt	Microsoft PowerPoint	Convert uses the native application to convert file formats using the external converter. These file formats are Office applications such as MS Word. Siemens Digital Industries Software does not supply native applications.

Input file extension	Description	Notes
		For MS Office files, Convert and Print cannot run as a Windows service.
pptx	Microsoft PowerPoint 2007	Convert uses the native application to convert file formats using the external converter. These file formats are Office applications such as MS Word. Siemens Digital Industries Software does not supply native applications. For MS Office files, Convert and Print cannot run as a Windows service.
prt	NX Part	PRT files are only supported on Windows, Linux, and Macintosh.
pvl	Vis View Viewlist	None
rtf	Microsoft Rich Text Format	Convert uses the native application to convert file formats using the external converter. These file formats are Office applications such as MS Word. Siemens Digital Industries Software does not supply native applications. For MS Office files, Convert and Print cannot run as a Windows service.
tg4	Intergraph Tiled Group 4	None
tga	Truevision Targa	None
tif	TIFF Raster	Convert uses the native application to convert file formats using the external converter. These file formats are Office applications such as MS Word. Siemens Digital Industries Software does not supply native applications. You can use the command line parameter -monocolor or the Monocolor configuration file setting to process any input file type that supports color as a monochrome output.
tlc	TLC Raster	None
triff	TRIFF	None
txt	Text	None
ubn	Uncomp. Binary Raster	None
uhx	Uncomp. Hexadecimal Raster	None
vf	Vis View Session File	None
vsd	Visio Drawing	Convert uses the native application to convert file formats using the external converter. These file formats are Office applications such as MS Word. Siemens Digital Industries Software does not supply native applications.
w2d	AutoDesk toolkit	None

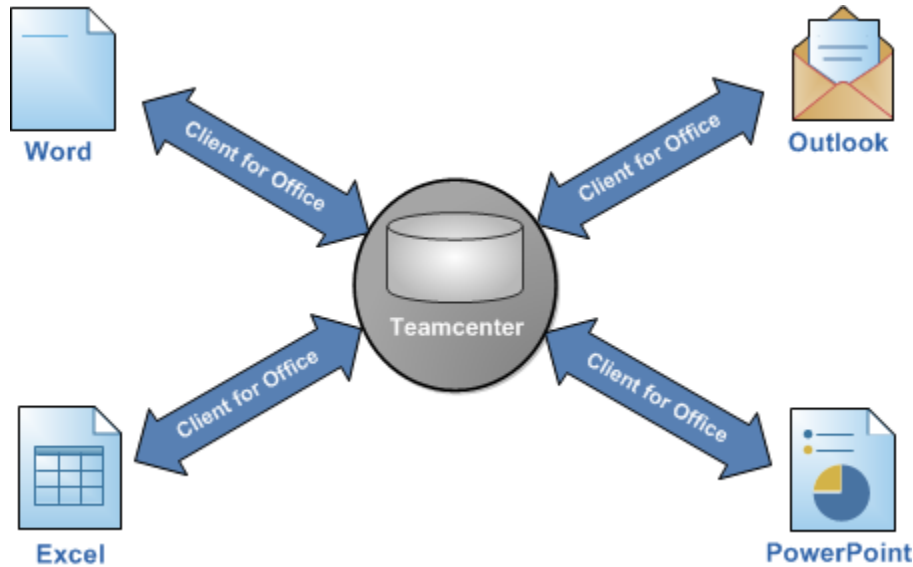
Input file extension	Description	Notes
wbmp	Wireless Bitmap	None
xls	MS Excel	Convert uses the native application to convert file formats using the external converter. These file formats are Office applications such as MS Word. Siemens Digital Industries Software does not supply native applications. For MS Office files, Convert and Print cannot run as a Windows service.
xlsx	MS Excel 2007	Convert uses the native application to convert file formats using the external converter. These file formats are Office applications such as MS Word. Siemens Digital Industries Software does not supply native applications.
zip	ZIP Compressed File	None

Additional capabilities provided by Document Management batch printing include creating configuration objects to manage printer configuration and system stamp configuration. Batch printing lets you select workspace objects, such as items, item revisions, or datasets, and print the associated documents with system stamps and watermarks.

For more information about file formats, see *Introduction to Convert and Print* guide, which is available in the Lifecycle Visualization documentation.

7. Leveraging Microsoft Office features

You can leverage Microsoft Office features to work with documents and to exchange data between Teamcenter and Office. Teamcenter Client for Office gives you direct access to Teamcenter through Microsoft Word, Excel, PowerPoint, and Outlook. You can manage Teamcenter workspace objects in real-time by using the Microsoft work environment.



In Microsoft Office applications, Client for Office adds a custom **Teamcenter** tab to the ribbon in the main windows. By using the different options of the **Teamcenter** menu, you can perform various tasks, such as manage, search for, edit, or mark up Teamcenter data. For more information about using Microsoft Office applications to work with Teamcenter data, see *Teamcenter Client for Microsoft Office*.

8. Searching for documents

Run a simple search


Caution:

Siemens Digital Industries Software recommends that the Office ribbon be fully visible. If the ribbon is minimized when the search is started, it may result in an error. If the Office ribbon is minimized, right-click the ribbon tab name area and turn off the **Minimize the Ribbon** option.


You may minimize the ribbon again after the **Advanced Search** view appears.

You can search using predefined search types.

- In the **Navigation** view or the **Folder View**, the item identifier is the default search query at the top of the view. Type an identifier of the item that you want to find.
- Change to a different query type by selecting one from the list:
 - **Search By**→Item ID
 - **Search By**→Item Name
 - **Search By**→Dataset Name

After you enter your search criteria, click search  to display the results in a new tab of the **Advanced Search** view.

Run an advanced search

1. Choose one of the following:
 - On the **Teamcenter** tab, click **Search**  to display the **Advanced Search** view.
 - In the **Navigation** view or the **Folder View**, click ▼ next to the **Enter Item ID** box and choose **Advanced Search**.
2. On the **Queries** tab, scroll the pane until you see the query that you want, and then select it.

Information boxes and lists that are specific to the query type are displayed in the **Custom Query Form** pane. A description of the query is shown below the **Select Query Type** pane.

3. In the **Custom Query Form** pane, enter information to narrow your search.

You can click **Clear** to remove all existing information from this pane.

4. Click **Find**.

The **Advanced Search** view displays the results on a new tab. In this view, each tab name indicates the type of query that produced the results.

You can right-click an object and choose menu commands that are specific to the object type.

- Choose **Properties** to view the properties in the **Property Display** view.
- Choose **Refresh** to get updated property values from Teamcenter.
- Choose **Check-In/Out** to display the **Teamcenter Check-In/Out** view.
- Choose **Insert** to insert the object's attributes in the open Office document.
- Choose **Delete** to delete the object from Teamcenter.
- Choose **New Workflow Process** to submit the object to a workflow.
- Choose **Open File (Read-Only)** to open the object in the corresponding Office application and view the content in read-only mode.
- Choose **Open and Check-Out File** to open the object in the corresponding Office application and check out the object for editing.

5. To save the query:

- a. Click **Save** to open the **My Saved Searches** tab.
- b. Type a name for the search in the **Saved Search Name** box.
- c. Click **Add** to save the search.


The search appears in your **My Saved Searches** folder.

- d. Right-click the query in your **My Saved Searches** folder and choose **Execute Query** to perform the search.

6. To remove a tab of search results, select the search results tab you want to remove and click **Delete**.

7. To specify a new search, click **Queries** to return to the **Queries** tab.

Save a search

1. Do one of the following:
 - On the **Teamcenter** tab, click **Search**  to display the **Advanced Search** view.
 - In the **Navigation** view or the **Folder View**, do the following:
 - a. Click the down arrow to the right of the box at the top of the view to display a list.
 - b. Select **Advanced Search** to display the **Advanced Search** view.
2. On the **Queries** tab, select the query type and enter custom query form criteria.
3. Click **Save** to display the **My Saved Searches** tab.
4. Type a name for the search in the **Saved Search Name** box.
5. Click **Add** to add the new search to the **My Saved Searches** list.

The search name appears under **My Saved Searches** in the **Navigation** view. You can run a search from this view by right-clicking the search and choosing **Execute query**. Results are shown on a new tab in the **Advanced Search** view.


Run a saved search

From the Navigation or Folder view

1. To display your searches, do one of the following:
 - In the **Navigation** view, click **My Saved Searches**.
 - In the **Folder View**, expand **My Saved Searches**.
2. Right-click the search and choose **Execute query**.


In the **Navigation** view, you can also rest the pointer on the search to display a right arrow, and then click the arrow to start the query.

From the Advanced Search view

1. To display your searches, do one of the following:
 - On the **Teamcenter** tab, click **Search**  to display the **Advanced Search** view.

- In the **Navigation** view or the **Folder View**, click ▼ next to the **Enter Item ID** box and choose **Advanced Search**.
2. In the **Advanced Search** view, click the **My Saved Searches** tab.
 3. Select the search from the **My Saved Searches** list, and click **Find**.

Delete a saved search

1. Do one of the following:
 - On the **Teamcenter** tab, click **Search**  to display the **Advanced Search** view.
 - In the **Navigation** view or the **Folder View**, do the following:
 - a. Click the down arrow to the right of the box at the top of the view to display a list.
 - b. Select **Advanced Search** to display the **Advanced Search** view.
2. Click the **My Saved Searches** tab.
3. Select the search in the **My Saved Searches** list, and then click **Delete**.

A message asks you to confirm that you want to delete the search.

4. Click **Yes**.

The search name is removed from under the **My Saved Searches** node in the **Navigation** view.