TEAMCENTER

Teamcenter Client for Microsoft Office

Teamcenter 2412

SIEMENS

About Siemens Digital Industries Software

Siemens Digital Industries Software is a global leader in the growing field of product lifecycle management (PLM), manufacturing operations management (MOM), and electronic design automation (EDA) software, hardware, and services. Siemens works with more than 100,000 customers, leading the digitalization of their planning and manufacturing processes. At Siemens Digital Industries Software, we blur the boundaries between industry domains by integrating the virtual and physical, hardware and software, design and manufacturing worlds. With the rapid pace of innovation, digitalization is no longer tomorrow's idea. We take what the future promises tomorrow and make it real for our customers today. Where today meets tomorrow. Our culture encourages creativity, welcomes fresh thinking and focuses on growth, so our people, our business, and our customers can achieve their full potential.

Support Center: **support.sw.siemens.com**

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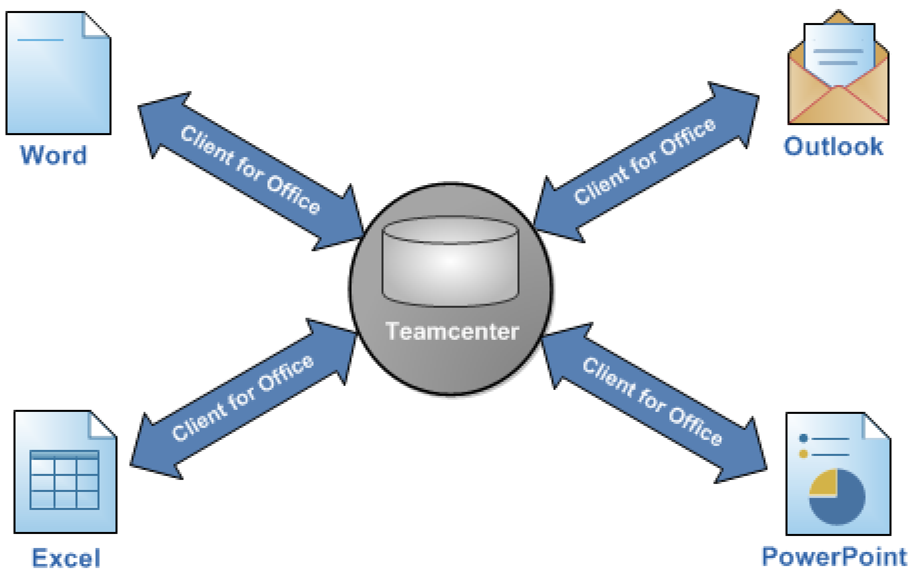
Contents

1. Start Client for Office and personalize the interface

Managing Teamcenter content using the Client for Office interface

Teamcenter Client for Microsoft Office gives you direct access to Teamcenter through Microsoft Office Word, Excel, PowerPoint and Outlook. You can manage Teamcenter workspace objects in real time using the Microsoft work environment, which allows more people throughout the extended enterprise, including partners and suppliers, to participate in product lifecycle processes.



In Microsoft Office Word, Microsoft Office Excel, Microsoft Office PowerPoint, and Microsoft Outlook, Client for Office adds a custom **Teamcenter** tab to the ribbon in the main windows. In both Microsoft Outlook, the ribbon in each *open* message contains the custom **Teamcenter** tab.

Client for Office is independent of the Teamcenter rich client. You can work in Client for Office with or without the rich client running.

Client for Office can be installed with Teamcenter or separately as an add-in.

Caution:

To import requirement structures directly from Microsoft Office Word, you must select the **Teamcenter Office for Microsoft Client→Word Applications→Requirements Management Integration** option when installing Client for Office.

Note:

With Teamcenter Extensions for Microsoft Office, or *live Excel*, you can make live synchronous updates to Teamcenter objects using Excel. If Extensions for Office is loaded, you cannot edit an embedded Excel spreadsheet in a Word document. You must disable the **Teamcenter Office Live for Office** add-in in Excel.

To disable the add-in, do the following in Excel:

1. Choose **File→Options** and click **Add-ins**.
2. Select **COM Add-ins** to manage and click **Go**.
3. In the **COM Add-ins** dialog box, clear the check box next to the **Teamcenter Office Live for Office** add-in and click **OK**.

Office file types supported by Client for Office

Client for Office gives you direct access to Office documents that are stored in Teamcenter. You can work in Client for Office without running the Teamcenter rich client.

Use Client for Office to work with Office documents of the following types.

Office application	File types
Word	**.docx**, **.doc**,**.dotx**.**dot**, **.mrk** or **.html**
Excel	**.xlsx**, **.xls**,**.xltx**.**xlt**, or **.html**
PowerPoint	**.pptx**, **.ppt**,**.potx**.**pot**, or **.html**
Outlook	**.msgx**, **.msg**, or **.pdf**

If your system is configured to handle file types such as JPEG, GIF, PNG, and PDF files, you can view them using the Office client. To open such a file, right-click the dataset, choose **View File**, and select the file to open.

Start Client for Office for the first time

The first time you start an Office application after the Client for Office installation, the **Microsoft Office Customization Installer** displays a message stating that Siemens Digital Industries Software is the publisher and asking if you want to install the customization. You need to click **Install** to install the Teamcenter add-in for the application.

After you install the add-in, Client for Office provides the following additions to the following Office suite of products.

Office product	Client for Office addition
Microsoft Office Word Microsoft Office Excel Microsoft Office PowerPoint Microsoft Office Outlook	A **Teamcenter** tab is incorporated in the Office ribbon.
Microsoft Outlook	The **Teamcenter** tab is available on the ribbon in each open message.

Before you can access any of the functions for the Teamcenter add-in, you are prompted to log on to Teamcenter. Depending on whether Security Services is configured on the Teamcenter server, one of the following displays:

- The Teamcenter logon page displays if Security Services is configured.
- The logon dialog box displays if Security Services is not configured.

Personalizing the interface by updating user settings

Change your group or role

1. On the **Teamcenter** tab, click **Current Settings** ⚙ and choose **Session**.

   The **Session** dialog box is displayed.

2. Select the new group in the **Group** list.
3. Select the new role in the **Role** list.
4. Click **OK**.

Set your work context

A work context is a profile that a user assumes to complete a specific assignment. Work contexts are created from a combination of user name, group, role, and project; however, not all definitions of a work context include all four of these elements.

For this option to be available, the **TC_wc_show_all** preference must be set to **true**, and one or more work contexts must exist in Teamcenter.

1. On the **Teamcenter** tab, click **Current Settings** ⚙ and choose **Session**.

The **Session** dialog box is displayed.

2. Select the new work context in the **Work Context** list.

3. Click **OK**.

Set your project or program assignment

1. On the **Teamcenter** tab, click **Current Settings** and choose **Session**.

   The **Session** dialog box is displayed.

2. Select the project in the **Project** list (or **Program**, if the ADS template is installed).

3. Click **OK**.

Change the Client for Office display language

1. On the **Teamcenter** tab, click **Current Settings** and choose **Basic Teamcenter Preferences**.

   In the **Miscellaneous** pane, **Change Session Culture** is displayed.

2. Select the new language from the **Choices** list, and then click **OK**.

Setting Client for Office document preferences

Changing Client for Office document settings

Client for Office preferences let you control the way you work with Office documents.

> Note:
>
> These preferences are specific to Client for Office. They do not relate to Teamcenter user preferences and site preferences.

On the **Current Settings** button menu, the **Basic Teamcenter Preferences** option displays the **Basic Teamcenter Preferences** dialog box, where each tab contains different options.

- On the **Miscellaneous** tab, you can set options for language and color theme. Advanced settings allow you to manage temporary files.

  - **Change Session Culture** displays the current language setting and a list of language choices.

  - **Change Color/Theme** displays the current color setting and a list of color choices.

- **Advanced settings** displays **Manage Temporary Files** options where you can:

  - Select the option to automatically delete all temporary files (older than one week).

  - Launch Explorer to manage log files.

  - Launch Explorer to manage temp files.

- On the **Insert Data** tab, you can set the type of Teamcenter data to insert in Office documents for individual object types.

  - Folders
  - Items
  - Item revisions
  - Microsoft Office files
  - Image files

    > Note:
    >
    > Bitmap image files (**.bmp**) cannot be inserted in Microsoft Office Word documents with Teamcenter live Word capability.

  - JT files
  - Forms
  - Other Teamcenter files

  Depending on the object type, you can set an option to insert one of the following:

  - Object properties in tables with columns and rows

    The **Details** option sets this preference for the related type.

  - Hyperlinks to objects (except forms) in the Teamcenter web client.

    The **Hyperlink** option sets this preference for the related type.

  - Embedded contents of Office files, image files, and JT files

    The **Embed** option sets this preference for the related type.

    > Note:
    >
    > Bitmap image files (**.bmp**) cannot be embedded in Microsoft Office Word documents with Teamcenter live Word capability.

Note:

Some options are not available for some types.

- On the **Insert Details** tab, you can set the property columns to insert for the object types that you set with the **Details** option.

Configure how Teamcenter objects are inserted

1. On the **Teamcenter** tab, click the **Current Settings** button ⚙ and choose **Basic Teamcenter Preferences**.

   The **Basic Teamcenter Preferences** dialog box displays.

   Note:

   These preferences are specific to Client for Office. They do not relate to Teamcenter user preferences and site preferences.

2. Click the **Insert Data** tab and select an option under **Configuration Choices** for one or more object types.

Option	Description
Details	Insert object properties in tables with rows and columns. You can also set the property columns to insert.
Hyperlink	Insert hyperlinks to objects in the Teamcenter web client. Note: • The **Hyperlink** option is not available for objects in the Teamcenter rich client or for forms in the web client. • The **Hyperlink** option is controlled by certain Teamcenter preferences configured for your site. These site preferences are not the same as any of the Client for Office preferences. If you have questions about this option, consult your Teamcenter administrator.

Option	Description
	Tip: You can choose from the options in the **Basic Teamcenter Preferences** dialog box, in the **Additional Options** section to configure the display of hyperlinks.
Embed	Insert the full contents of the files. Note: • The **Embed** option is available only for Microsoft Office documents and image files. • You cannot insert bitmap image files (**.bmp**) in a document with Teamcenter live Word capability.

3. Do one of the following:

   - Click **Apply** to commit the settings and continue working on another tab.

     Caution:

     Changes are canceled if you click another tab before you click **Apply**.

   - Click **OK** to commit the settings and close the dialog box.

Configure data display

1. On the **Teamcenter** tab, click the **Current Settings** button and choose **Basic Teamcenter Preferences**.

   The **Basic Teamcenter Preferences** dialog box displays.

   Note:

   These preferences are specific to Client for Office. They do not relate to Teamcenter user preferences and site preferences.

2. Click the **Insert Details** tab and do one or more of the following:

   - To add a property to the inserted table, select the check box to the left of the column name in the dialog box.

- To remove a property from the inserted table, clear the check box to the left of the column name in the dialog box.
- To move a property to the left in the inserted table, drag the column name up to the corresponding position in the dialog box.
- To move a property to the right in the inserted table, drag the column name down to the corresponding position in the dialog box.
- To change a displayed property name, double-click the cell under **Column Name** and type the new name.

3. Do one of the following:

   - Click **Apply** to commit the settings and continue working on another tab.

     > Caution:
     >
     > Changes are canceled if you click another tab before you click **Apply**.

   - Click **Defaults** to use the default column settings.
   - Click **OK** to commit the settings and close the dialog box.

Specify whether hyperlinks point to the rich client or to the web client

You can configure which client (rich client or web client) hyperlinks are generated for.

> Note:
>
> You can configure this only if the system administrator has configured the system to allow users to modify this setting.

To do so:

1. Open the Client for Office application. In the **Teamcenter** tab, click the **Current Settings** button and choose **Basic Teamcenter Preferences**.

   The **Basic Teamcenter Preferences** dialog box is displayed.

   > Note:
   >
   > These preferences are specific to Client for Office. They are not related to Teamcenter user preferences and site preferences.

2. In the **Miscellaneous** tab, in the **Advanced Settings** section, select the **Link to Rich Client** check box if you want hyperlinks to be generated for the rich client. To generate hyperlinks to the web client, clear the **Link to Rich Client** check box.

3. Click **Apply**.

Configure the display of hyperlinks in documents

You can customize how hyperlinks are displayed when inserted into a document. Specifically, you can choose whether to include an item ID/revision, item name, or both to be used as the hyperlink text. You can also specify an icon to be displayed in the hyperlink.

Hyperlink configuration selections persist untill you change them.

To configure the display of hyperlinks:

1. In the Client for Office, in the **Teamcenter** tab, click the **Current Settings** button and choose **Basic Teamcenter Preferences**.

   The **Basic Teamcenter Preferences** dialog box is displayed.

   > Note:
   >
   > These preferences are specific to Client for Office. They are not related to Teamcenter user preferences and site preferences.

2. In the **Insert Data** tab, in the **Additional Options** section, select an option for the hyperlink text:

   - **Show icon**

     Displays an icon at the beginning of the hyperlink.

   - **Item ID**

     Displays the item's ID in the hyperlink text.

     For example, if you select only **Item ID**, the hyperlink is displayed as follows:

     014461/A;1

   - **Item Name**

     Displays the item's name in the hyperlink text.

For example, if you select only **Item Name**, the hyperlink is displayed as follows:

MyItem

If you select both **Item ID** and **Item Name**, the hyperlink is displayed as follows:

014461/A;1-MyItem

> Note:
>
> To ensure that a hyperlink contains at least minimal identifying information, the hyperlink text must have either the item ID/revision or the item name.

3. Click **Apply**.

Set up the automatic deletion of log files and temporary files after a specified number of days

You can configure the deletion of log files and temporary files after a specified number of days if the system administrator has not already configured these settings by adding the **autodelete** section to the *config.template* file.

To configure the deletion of log files and temporary files after a specified number of days:

1. Open the Client for Office application. In the **Teamcenter** tab, click the **Current Settings** button and choose **Basic Teamcenter Preferences**.

   The **Basic Teamcenter Preferences** dialog box is displayed.

   > Note:
   >
   > These preferences are specific to Client for Office. They do not relate to Teamcenter user preferences and site preferences.

2. In the **Miscellaneous** tab, in the **Advanced Settings** section, in the **Manage Log and Temporary Files** section, check the **Automatically delete all Log files older than the following number of days** checkbox and specify the number of days after which you want the log files to be deleted. To specify the automatic deletion of temporary files, check the **Automatically delete all Temporary files older than the following number of days** checkbox, and specify the number of days after which you want the log files to be deleted.

3. Click **Apply**.

Exit Client for Office

1. On the **Teamcenter** tab, click **Current Settings** and choose **Logout**.

   The **Teamcenter** tab is available on the Office ribbon in the Word, Excel, PowerPoint, and Outlook main windows and in open Outlook messages.

   Client for Office displays a message asking if you want to end this session.

2. Click **Yes**.

   Note:

   This action closes all open Client for Office views and terminates the existing Teamcenter session.

2. Searching in Teamcenter

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.

3. Working with Teamcenter objects from Client for Office

Tasks you can perform using the Teamcenter tab on the Office ribbon

The **Teamcenter** tab on the Office ribbon gives you direct access to Teamcenter data. The tab buttons display various Client for Office panes in the Office application windows.

1	**Data Management** button group
2	**Navigation and View** button group
3	**Tasks** button group
4	**Workflow** button group
5	**Requirements** button group
6	**Attribute Exchange** button group
7	**Settings** button group
8	**Help** button group

Use these panes to work with Teamcenter objects without running the Teamcenter rich client. You can:

- Browse to and search for Office documents and other Teamcenter objects.
- View the properties of Teamcenter objects.
- Check out and check in Office files in Teamcenter.
- Create, edit, save, and delete Office files in Teamcenter.
- Create Teamcenter folders, items, and item revision objects in Teamcenter.
- Revise item revisions.
- Insert Teamcenter object property values, search results, pictures, JT files, and hyperlinks in Office files.

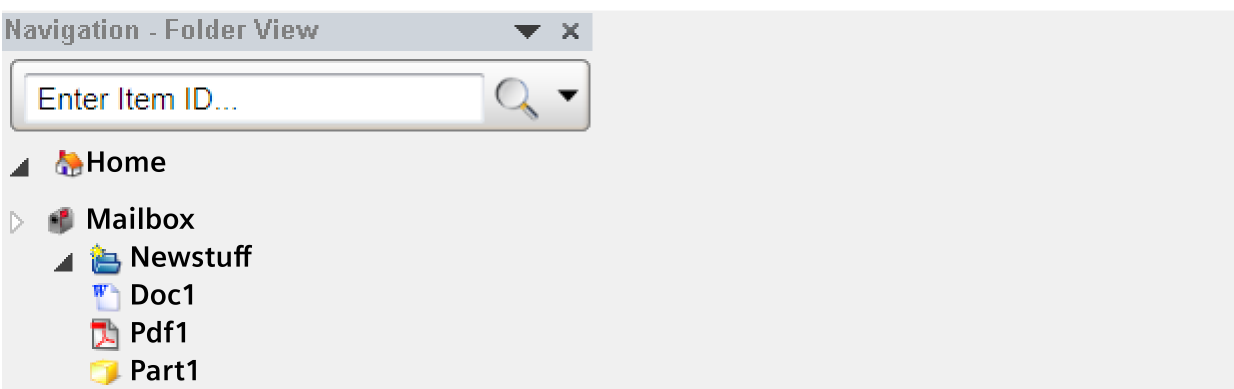
- Review Word documents using the **Teamcenter Markup Manager** view to work with markup comments.
- View and mark up PDF files from Microsoft Outlook.
- Digitally sign PDF files from Microsoft Outlook.
- Submit Office files to Teamcenter workflows and perform Teamcenter sign-off tasks.
- Configure attribute exchange settings to synchronize Teamcenter object attributes and Office file properties.
- Import data from Excel to create and modify structures and objects in Teamcenter.
- Manage Teamcenter requirements.

Navigate and browse Teamcenter objects

1. From the Office application, click the **Teamcenter** tab→**Navigation and View** group→**Navigate**.
2. Choose one of the following options:

   - **Folder View**

     In the **Navigation-Folder View** pane, click the button beside the Teamcenter object or folder you want to expand.

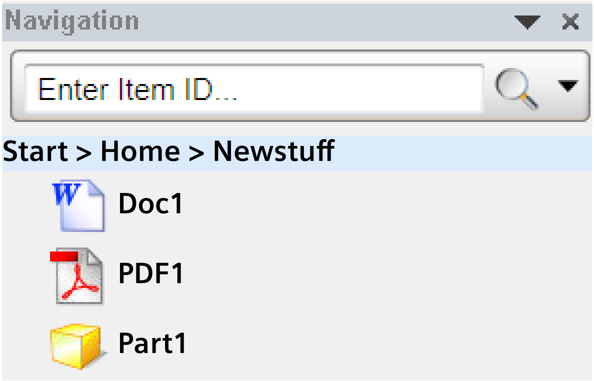
     

   - **Browse**

     In the **Navigation** pane, choose any of the following options to expand the folder or the Teamcenter object:

     - Click the folder or the object.

- Click the ▶ button next to the folder or Teamcenter object.
- Click the folder or Teamcenter object location at the top of the pane to navigate up and down the folder structure.



Move and copy Teamcenter objects

In the **Navigation-Folder View** pane, you can move and copy Teamcenter objects.

When you *move* an object, you remove it from one location and place it in another. For example, you can move an Office file from one item revision to another. It no longer is stored with the original item revision, only with the target item revision.

When you *copy* an object, you create another instance of the same object in a new location, so you then have two different instances of the same object. For example, you can copy an object from a workflow task to an item revision. The object remains with the workflow task but is also stored with the item revision.

1. From the Office application, open, navigate to, or search for the Office file object you want to move or copy using the **Navigation-Folder View** pane.

2. Right-click the object, and choose one of the following:

   - **Cut**: To move the object from one location to another.
   - **Copy**: To create a new instance of the object at an additional location.

   You can select multiple objects of the same type by using the standard Windows multiselect functions.

3. Right-click the location where you want to move or copy the object, and choose **Paste**.

Delete Teamcenter objects

1. Click **Teamcenter** tab→**Navigation and View** group→**Navigate** button and choose **Folder View** or **Browse** to navigate for the objects you want to delete.

2. Select the objects you want to delete.

   You can select multiple objects of the same type by using the standard Windows functions.

   - Folders
   - Items
   - Datasets
   - Workflow tasks

3. Right-click the selection and choose **Delete**.

   Client for Office displays a confirmation message, asking if you want to delete the selected objects.

4. Click **Yes**.

Reserving Teamcenter objects

Checking out and reserving Teamcenter objects

By checking an object out of Teamcenter, you reserve access to the object so that only you can modify it. Only your Teamcenter system administrator can override that reservation.

> Tip:
>
> In the Teamcenter rich client, the symbol for the checkout displays when you select the document and choose **Tools**→**Refresh**.

You retain explicit checkout privileges on the object until you do one of the following:

- Check in the object to unlock it in Teamcenter.

  When you are finished with your modifications, checking in the object releases it so that it is available to other users.

- Cancel the checkout to release the object.

  If you modify the object and then cancel the checkout, changes are discarded.

- Transfer the checked out object to another user.

  If you have an object checked out, you can transfer the check out to a different user so that user can make modifications to the object. The new user needs to check the object in after the modifications are complete so it is available to other users for checkout.

  > Note:
  >
  > The **Transfer Check-Out** option is unavailable for objects that are not checked out.

Also, you can view the checkout and checkin history of an object. A checkout history lists such information as the users who have checked out the object and when, the object's current reservation status, and any comments provided about the checkout operations.

Limit or eliminate the checkout confirmation

You can control the visibility of the checkout confirmation dialog by setting certain Teamcenter preferences.

The **Check-Out** confirmation dialog box is displayed when the **Confirm_checkout_suppressed** preference value is **false**.

If the **Check-Out** confirmation dialog is displayed, you can optionally display the **Don’t show confirmation dialog again** check box when:

- The **Confirmation_shown_on_reservation_dialogs** preference value is **true**.

- Set this preference value to **false** if you do not want to show this check box option when the **Check-Out** confirmation dialog is displayed.

> Note:
>
> If the **Don’t show confirmation dialog again** check box is checked by the user, this automatically and permanently sets the **Confirm_checkout_suppressed** preference value to **true**. Thus, future run time sessions will honor this choice. To set the **Confirm_checkout_suppressed** preference value back to **false**, use the Teamcenter client of your choice to edit the preference value.

The **Check-Out** confirmation dialog box is permanently suppressed (not displayed) when the **Confirm_checkout_suppressed** preference value is **true**.

If you have questions about preferences, consult your Teamcenter administrator.

Check out an Office file object

1. From the Office application, open, navigate to, or search for the Office file object you want to check out from Teamcenter.

   > Tip:
   >
   > A symbol displayed next to the file indicates that it is already checked out. To see which user owns the reservation, you can select the object and do one or both of the following:
   >
   > - Click **Check-In/Out** on the **Teamcenter** tab, and choose **Check-Out History**.
   > - Click **Properties** on the **Teamcenter** tab to display the **Properties Display** view.
   >
   >   The **Checked Out By** value shows the user.

2. Do one of the following:

   - Select the Office file object that you want to check out, and then on the **Teamcenter** tab, click **Check-In/Out**, and choose **Check-Out**.
   - Right-click the Office file object you want to check out, and then choose **Check-In/Out→Check-Out**.

   The **Check-Out** dialog box appears.

   > Note:
   >
   > Teamcenter preferences can be set to bypass the **Check-Out** dialog box.

3. In the **Change ID** box, type an optional identifier for the checkout.

4. In the **Comments** box, type an optional reason for the checkout.

5. Click **OK** to confirm the checkout.

   > Tip:
   >
   > A symbol appears to the right of the Office file name in the **Folder View**. The file is locked in Teamcenter and can be modified only by you while you have it checked out.

Transfer a checkout to another user

1. From the Office application, open, navigate to, or search for the Office file object for which you want to transfer the check-out to another user.

2. Do one of the following:

   - Select the Office file object that you want to transfer, and then on the **Teamcenter** tab, click **Check-In/Out**, and choose **Transfer Check-Out**.

   - Right-click the Office file object you want to transfer, and then choose **Check-In/Out→Transfer Check-Out**.

   The **Transfer Check-Out** dialog box appears.

3. From the **Users List**, select the user you want to transfer the checkout to.

   > Tip:
   >
   > Use the **Filter User List** to find a user's name in the list. For example, to find John Smith, begin typing **Smith** in the box, and the **Users List** displays matching names.

   The user's name appears in the **New User** box.

4. Click **Yes** to transfer the checkout or **No** to cancel.

Check in an Office file object

> Note:
>
> To see the symbol for a checked out object in the Teamcenter rich client, you may need to select the object and choose **Tools→Refresh**.

1. From the Office application, open, navigate to, or search for the Office file object you want to check in.

   You can select and check in multiple objects simultaneously.

2. Do one of the following:

   - Select the Office file object that you want to check in, and then on the **Teamcenter** tab, click **Check-In/Out**, and choose **Check-In**.

   - Right-click the Office file object you want to check in, and then choose **Check-In/Out→Check-In**.

   The **Confirm Check-In** dialog box appears with a message asking if you want to continue with the checkin.

3. Click **Yes**.

The symbol is removed from the right of the object's name in the **Folder View**. The object is unlocked in Teamcenter.

> Tip:
>
> In the Teamcenter rich client, the symbol displays when you select the document and choose **Tools→Refresh**.

Cancel a checkout for an object

> Caution:
>
> If you modify a checked out object and then cancel the checkout, your modifications are not applied in Teamcenter.

1. From the Office application, open, navigate to, or search for the Office file object for which you want to cancel the check-out.

   You can select multiple objects simultaneously.

2. Do one of the following:

   - Select the Office file object, and then on the **Teamcenter** tab, click **Check-In/Out**, and choose **Cancel Check-Out**.

   - Right-click the Office file object, and then choose **Check-In/Out→Cancel Check-Out**.

   The **Cancel Check-Out** dialog box appears with a message asking if you want to cancel the check-out.

3. To continue, click **Yes**.

   > Warning:
   >
   > This action reverses any changes to the object since it was last checked out.

   The symbol is removed from the right of the object's name in the **Folder View**. The object is unlocked in Teamcenter.

View the checkout history of an object

1. From the Office application, open, navigate to, or search for the Office file object for which you want to view the checkout history.

2. Do one of the following:

- Select the Office file object, and then on the **Teamcenter** tab, click **Check-In/Out** , and choose **Check-Out History**.
- Right-click the Office file object, and then choose **Check-In/Out→Check-Out History**.

The **Check-Out History** dialog box appears with a property table containing the following information for each transaction:

- **Date/Time** shows when the transaction occurred.
- **Activity** shows whether the transaction was a checkout, a checkin, a canceled checkout, or a transferred checkout.
- **User** shows the user ID under which the transaction occurred.
- **Change ID** shows the transaction's identifier, if entered by the user.
- **Comment** shows an explanation of the transaction, if entered by the user.

Opening Office files to view or to edit them

You can open Office files stored in Teamcenter from the Office applications. You can open and check out the Office file to edit the document or open the Office file for read-only to browse the document.

You can open Office files using any of the following methods:

- From the Office application, click the **Teamcenter** tab→**Data Management** group→**Open**.

  This method requires the file type *must* match the Office application that you are running.

- From the Office application, click the **Teamcenter** tab→**Navigation and View** group→**Navigate** and choose **Browse** or **Folder View**.
- From the Office application, click the **Teamcenter** tab→**Navigation and View** group→**Search**.

  Using this method, you can open *any* supported Office file type from any of the Office applications. For example, if you are running Word, you can open a Word, Excel, PowerPoint, or Outlook file.

Depending on your access rights to the Office file, the following buttons on the ribbon under the **Teamcenter** tab in your Office application become available when you open a document:

- **Save**
- **Save As**

- **Check-In/Out**
- **Markup**

> Note:
>
> This option is only in Word.

- **New Workflow Process**
- **Attribute Exchange**

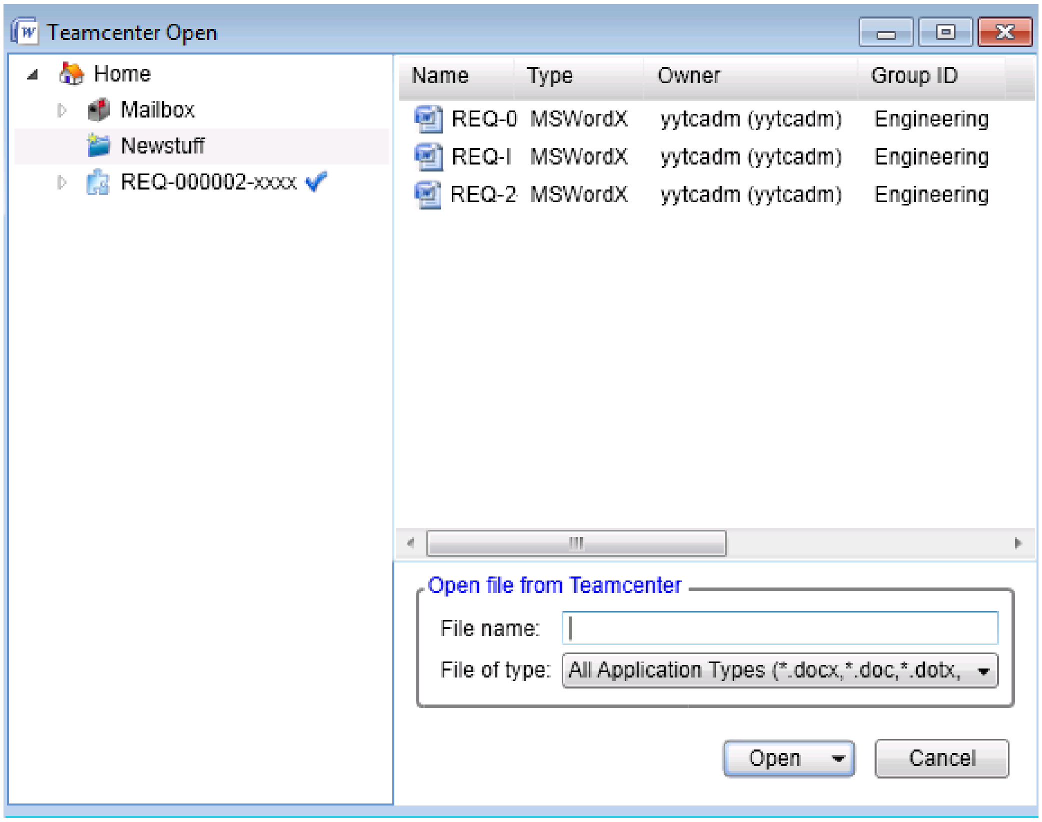
Open an Office file using the Open button

This method requires that the file type to open *must* match the Office application that you are running.

The following file types can only be opened from the specified Office application.

Office application	File types
Word	**.docx**, **.doc**,**.dotx**.**dot**, **.mrk** or **.html**
Excel	**.xlsx**, **.xls**,**.xltx**.**xlt**, or **.html**
PowerPoint	**.pptx**, **.ppt**,**.potx**.**pot**, or **.html**
Outlook 2010	**.msgx** or **.msg**

1. From the Office application, click the **Teamcenter** tab→**Data Management** group→**Open** .
2. On the left side of the **Teamcenter Open** dialog box, navigate to the folder that contains the Office file you want to open.
3. On the right side of the pane, select the Office file that you want to open or type the name in the **File name** box in the **Open file from Teamcenter** pane.



4. Click ▼ next to the **Open** button.

5. If you want to edit the Office file, perform the following steps:

   a. Choose **Open and Check-Out File**.

   b. From the **Check-out** dialog box, optionally type a change reason and change the ID and click **OK**.

      The document associated to the Office file is opened for edit in an Office application window.

      > Note:
      >
      > If you do not click ▼ next to the **Open** button, clicking the **Open** button automatically opens and checks out the Office file for edit. If you do not have write access to the file, a dialog box appears asking if you want to open the file for read-only access.

   c. If you want to open the Office file for read-only access, choose **Open File (Read-Only)**.

      The document associated to the Office file is opened for read in an Office application window.

Open an Office file using the navigation options

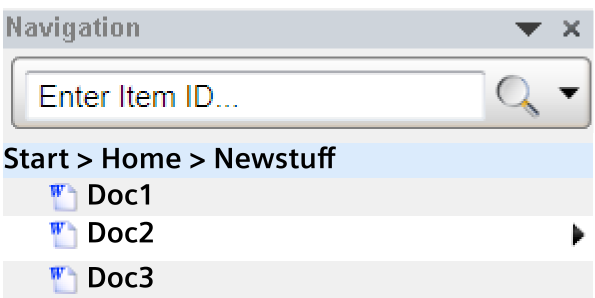
> Note:
>
> Using this method, you can open *any* Office file from any of the Office applications. For example, if you are running Word, you can open a Word file, Excel file, PowerPoint, or Outlook file.
>
> If the Office file is attached to a worklist item in your **My Worklist** folder, you can only open the attachment in read-only mode.

From the Office application, click the **Teamcenter** tab→**Navigation and View** group→**Navigate** and choose one of the following options:

- **Browse**

1. In the **Navigation** pane, navigate to the Office file by clicking the object or folder name you want to expand.

2. To open the Office file for read access, click next to the Office file or right-click the file and choose **Open File (Read Only)**.

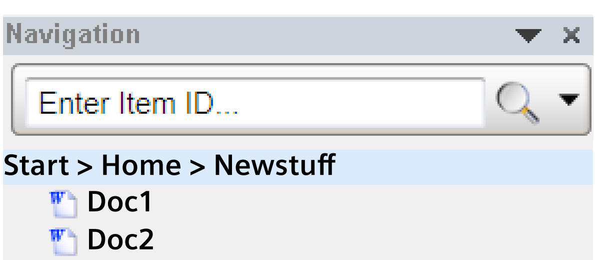
   

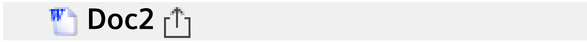
   The document associated to the Office file is opened in an Office application window with read-only access.

3. To open the Office file for editing, right-click the file and choose **Open and Check-Out File**.

   The document associated to the Office file is opened in an Office application window with edit access.

   As the example shows, a next to the file indicates it is checked out for edit.



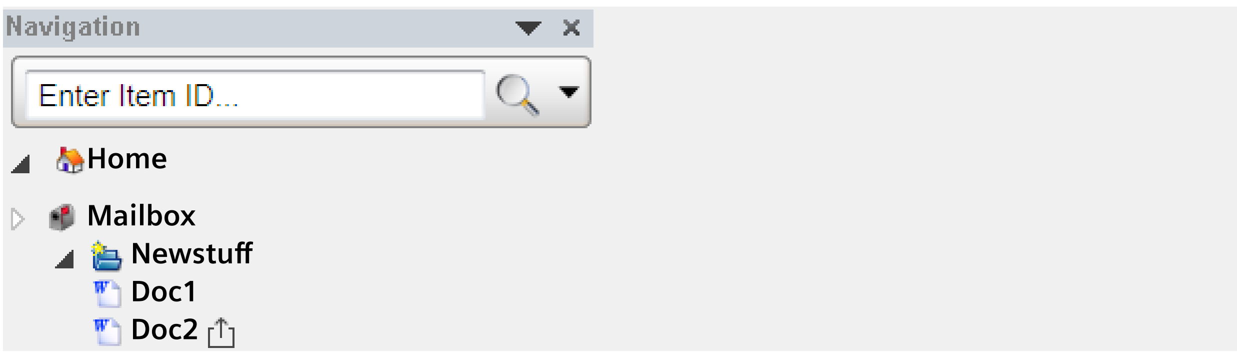
- **Folder View**

  1. In the **Navigation-Folder View** pane, navigate to the Office file by clicking beside the object or folder you want to expand.

  2. Right-click the Office file and choose **Open and Check-Out File** to check out and edit the file or **Open File (Read-only)** to view the file in read-only mode.

     The document associated to the Office file is opened in an Office application window with the appropriate access.

     As the example shows, a next to the file indicates it is checked out for edit.



Open an Office file using search

Using this method, you can open *any* Office file from any of the Office applications. For example, if you are running Word, you can open a file in Word, Excel, PowerPoint, or Outlook.

1. From the Office application, click the **Teamcenter** tab→**Navigation and View** group→**Search**.

2. From the **Advanced Search** dialog box, select **Dataset** for the query type and type the values for the fields in the query form to filter your search.

3. Click **Find** to search.

4. From the results list, right-click the Office file and choose **Open and Check-out File** to check out and edit the file or **Open File (Read-only)** to view the file in read-only mode.

   The document associated to the Office file is opened in an Office application window with the appropriate access.

Insert Teamcenter data in an Office document

Note:

- Client for Office settings control what kind of data is inserted for a given Teamcenter object type.
- Bitmap image files (**.bmp**) cannot be embedded in a Microsoft Office Word document with Teamcenter live Word capability.

1. Open the Office file in which you want to insert Teamcenter data.

2. Place the cursor at the insertion point in the open Office file.

3. In the open Office file application, using an option in the **Teamcenter** tab, **Navigation and View** group, navigate to the Teamcenter object containing the data to insert.

   The object you insert can be of one of the following types:

   - Folders
   - Items or item revisions
   - Forms
   - Office files
   - Image files

     Caution:

     You cannot insert bitmap image files (**.bmp**) in a document with Teamcenter live Word capability.

   - JT files

4. Right-click the object and choose **Insert**.

   The data appears at the cursor location in the Office file.

Saving Office files in Teamcenter

Overview of saving Microsoft Office files in Teamcenter

Use Client for Office to work with Microsoft Office files content in Teamcenter to:

- Save changes to existing Office files that you open from:
  - The Teamcenter rich client
  - Client for Office
- Create new Teamcenter objects from:
  - External Office files such as locally stored Word documents, for example
  - Existing Office files in Teamcenter

Save changes to an existing Teamcenter object

Caution:

If the file is currently open in read-only mode, you must close the file and reopen it in edit mode. Otherwise, your changes are saved to a new file.

You cannot switch to edit mode by checking out the file while it is open in read-only mode.

- To open the file for editing, right-click the file and choose **Open and Check-Out File**.
- In the Teamcenter rich client, the symbol for the checkout displays when you select the document and choose **Tools→Refresh**.

1. With the file open for editing, click **Save** on the **Teamcenter** tab.

   Note:

   - If the **Save** button is unavailable, the open document is not a Teamcenter object.

     To save changes in Teamcenter, you must click **Save As** and choose **Dataset**.
   - If the file is not checked out, a confirmation message asks if you want to check out and save the file.

     Click **Yes** to display the **Check-Out** dialog box.
     - In the Teamcenter rich client, the symbol for the checkout displays when you select the document and choose **Tools→Refresh**.
     - Teamcenter preferences can be set to bypass the **Check-Out** dialog box.
   - When saving a Microsoft Word document to Teamcenter, wait for the background save of Microsoft Word to complete. Especially for large documents this may take a considerable amount of time. To enable you to quickly save the document to Teamcenter, you can

temporarily disable the **Allow background saves** option. To do so, in Microsoft Word, choose **File→Options→Advanced**. Scroll to the **Save** section and deselect the **Allow background saves** option.

A status message displays a progress indicator.

2. When a confirmation message asks if you want to check in the file, do one of the following:

   - To check in the file and commit your edits, click **Yes**.

     The check mark is removed from the right of the file name in the **Navigation** view and the **Folder View**.

   - To keep the file open for editing, click **No**.

     The check mark remains to the right of the file name in the **Navigation** view and the **Folder View**.

> Note:
>
> Before checking in a Word document that already contains the markups, in the Teamcenter tab, always click **Markups** > **Save/Extract** so that the markups can be extracted to Teamcenter.

Use Save As to create a new Teamcenter object

1. With the source document open, click **Save As** on the **Teamcenter** tab, and choose **Dataset**.

   The **Teamcenter Save As** dialog box appears.

2. To create a new *folder* where you want to save the new Teamcenter object, perform the following steps:

   a. Click **Create a new Folder** at the top of the **Teamcenter Save As** dialog box.

   b. In the **Create New Folder** dialog box, navigate to and select a location where you want to create the folder.

      By default, the destination folder location is set to the location you selected in the tree pane located on the left side of the **Teamcenter Save As** dialog box.

   c. In the **Folder Name** box, type the folder name.

   d. Optionally, type a description of the folder in the **Description** box.

e. Click **OK** to create the folder and close the dialog box or click **Apply** to create the folder and leave the dialog box open.

   The folder is created under the specified location.

3. To create a new Teamcenter *item* object, perform the following steps:

   a. Click **Create a new Item** at the top of the **Teamcenter Save As** dialog box.

   b. In the **New item** dialog box, navigate to and select a location where you want to create the item.

      By default, the destination folder location is set to the location you have selected in the tree pane on the left side of the **Teamcenter Save As** dialog box.

   c. Click the button next to the **Item Type** box and select the item type from the list.

   d. Click **Next**.

   e. Click **Next** or select **Item Information** on the left side of the dialog box to enter the required item information.

   f. Optionally, click **Next** or select **Additional Item Information** on the left side of the dialog box to enter the additional item information.

   g. Optionally, click **Next** or select **Item Revision Information** on the left side of the dialog box to enter the item revision information.

   h. Optionally, click **Next** or select **Additional Item Revision Information** on the left side of the dialog box to enter the additional item revision information.

   i. Click **Finish** to create the item.

      The item is created under the specified location.

   j. Click **Close** to close the window or click **Next** to create a new item.

4. To create a new revision of a Teamcenter item revision object, perform the following steps:

   a. In the tree pane located on the left side of the **Teamcenter Save As** dialog box, navigate to and select the item revision you want to revise.

   b. Click **Revise an item revision in Teamcenter** at the top of the **Teamcenter Save As** dialog box.

c. In the **Rev ID** box, optionally type the new item revision ID, or use the value automatically generated from Teamcenter.

d. In the **Name** box, optionally type the new name of the item revision or use the value automatically generated from Teamcenter.

e. Click **OK** to create the new item revision.

5. In the tree view, navigate to and select the location where you want to save the Teamcenter object.

> Note:
>
> If you do not select a location, the object is added to the **Newstuff** folder.

6. Type the object name in the **File name** box.

   You can also do the following:

   - Type a description in the **Description** box.
   - Select the file type in the **Save as type** list.

7. For the **Relation** option:

   a. Select the parent folder or object to which you want to save the dataset.

      The default relation type is selected.

   b. If necessary, select a new relation type from the list.

8. Click the **Save** button to close the dialog box.

   A status message displays a progress indicator.

   The new object is saved in the selected location or in the **Newstuff** folder.

9. In the **Confirm Check-Out** dialog box, click **Yes** if you want to check out the Teamcenter object and associated Office file for edit.

Create or revise Teamcenter objects using Client for Office

Create a Teamcenter folder

Teamcenter folders are data objects that you use to organize product information. Folders can contain any other information object, including other folders.

1. Navigate to and select the location where you want to create the folder.

   For example, you can use the **Folder View** by clicking **Folder View** on the **Teamcenter** tab.

   > Note:
   >
   > If you do not select a location, the folder is added to the **Newstuff** folder.

2. On the **Teamcenter** tab, click **New** and choose **Folder**.

   > Note:
   >
   > You also right-click the target location and choose **Create Folder**.

   The **Create New Folder** dialog box displays.

3. Type the folder name in the **Folder Name** box.

   You can also type an optional description in the **Description** box.

4. Do one of the following:

   - To close the dialog box, click **OK**.

     The new folder appears in the selected location or in the **Newstuff** folder.

   - To keep the dialog box open and continue to create folders in the same location, click **Apply**.

Create a Teamcenter item

> Note:
>
> When you create a new item, you create the item and its first item revision.

1. Navigate to and select the location where you want to create the item.

   For example, you can display the **Folder View** by clicking the **Teamcenter** tab→**Navigation and View** group→**Navigate** and choosing **Folder View**.

   > Note:
   >
   > If you do not select a location, the item is added to the **Newstuff** folder.

2. On the **Teamcenter** tab, click **New** and choose **Item**.

The **New Item** wizard displays, beginning with the **Select Type** window.

3. In the **Item Type** list, select the type of item to create, and then click **Next** to display the **Item Information** window.

   Note:

   You can select an item type that uses cascading and interdependent lists of values (LOVs), if the Teamcenter administrator configured such item types in the Business Modeler IDE.

   If you have questions about item types and LOVs, consult your Teamcenter administrator.

4. In the **Item ID** and **Revision ID** boxes, type the identifiers to assign to the item and revision.

   Tip:

   To automatically generate the item and revision identifiers, click **Assign**.

   The next identifiers in the sequence appear in the **Item ID** and **Revision ID** boxes.

5. Type a unique name in the **Name** box.

   You can also do the following:

   - Type an optional description in the **Description** box.
   - Select a value from the **Unit of Measure** list.
   - If a Microsoft Office document is created with the item, select the **Automatically Open Document** check box to check out and open the document simultaneously.

     Note:

     - The item type can be configured with a corresponding document under Item Revision Definition Configuration (IRDC).
     - The document format must match the Office application in which you are creating the item.

6. Click **Next** to display the **Item Revision Information** window.

   In this and subsequent windows, the information is specific to the item type you select.

   If you have questions about information for the item type, consult your Teamcenter administrator.

> Note:
>
> - If the item type uses a cascading LOV (an LOV with subordinate LOVs), your value selection at one level determines the value choices that are available at the next lower level.
>
> - If the item type uses an interdependent LOV (a type of cascading LOV), you are prompted for a value selection at each level.

7. In the **Item Revision Information** window and each subsequent window, enter the required information and any optional information, and then click **Next**.

8. To complete the procedure, click **Finish**.

   The new item and item revision are added to the selected location or to the **Newstuff** folder.

Revise a Teamcenter item revision

> Note:
>
> When you revise an item revision, you create a new item revision. The new one automatically receives the next revision identifier in the sequence.

1. In the Office application, click the **Teamcenter** tab→**Navigation and View** group→**Navigate** and choose **Folder View** or **Browse**.

2. In the **Navigation** view or the **Folder View**, navigate to the item revision.

3. Right-click the item revision and choose **Revise**.

   The **Revise Item Revision** dialog box appears. The **Rev ID** box set to the next revision identifier in the sequence.

4. Do any or all of the following:

   - Change the item revision name in the **Name** box.

   - Enter or change the optional description in the **Description** box.

   - Select a project in the **Available Projects for Assignment** box.

   > Note:
   >
   > The following information is read-only:

- **Contents** displays the names of the objects included in the new item revision.
- **ID** displays the identifier of the related item.
- **Rev ID** displays the next revision identifier in the sequence.

5. Click **OK** to commit your changes and close the dialog box.

   The new item revision appears below and at the same level as existing item revisions.

Maintaining Teamcenter object data and properties

Introduction to maintaining Teamcenter object data

Client for Office interacts with HTML stylesheets maintained on the Teamcenter server to display the information in the **Properties Display** dialog box for a Teamcenter object. The displayed information and the actions you perform on the object from the **Properties Display** dialog box are dependent on the Teamcenter object that you select for the transaction. For example, if you display the properties for a part revision and have the appropriate access to the object, you can perform such actions as revising the object and sending the object to a workflow.

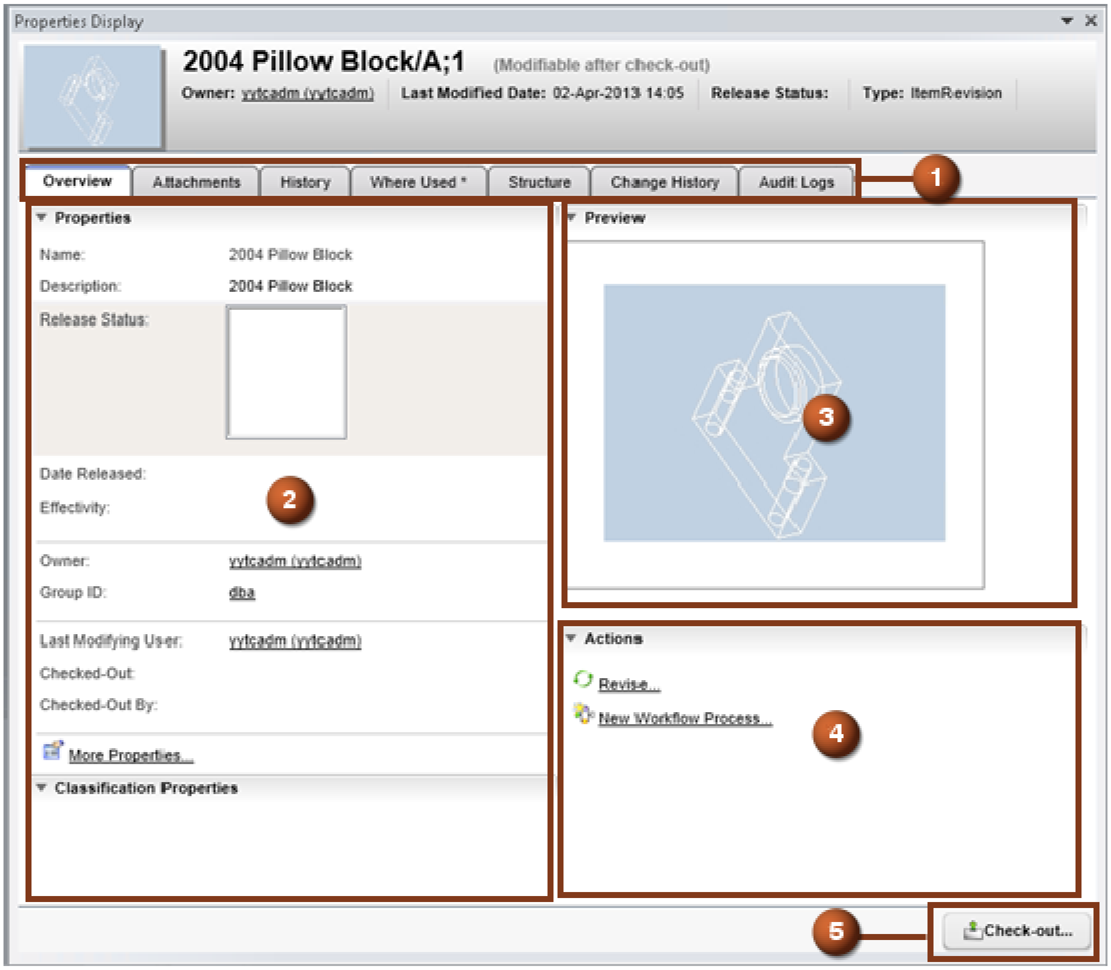
You also have the option of checking out objects and modifying any editable properties. After modifying the object properties, you can save the object, check in the object, or cancel the checkout directly from the **Properties Display** dialog box.

Note:

Internet Explorer must be updated to version 9 or above for style sheet support. If an older version of Internet Explorer is installed, you receive a warning message indicating Teamcenter will display the legacy properties dialog box. The legacy properties dialog box provides viewing of property data only.

Client for Office Properties Display dialog box

The following figure shows the layout of the properties information in the Client for Office **Properties Display** dialog box. In this example, the properties for a part revision are displayed.



1	Tabs	The tabs shown are dependent on the Teamcenter object you are displaying properties for. Tabs, such as **Overview**, **Attachments**, and **History** are displayed, as needed and as configured, to organize information about the selected object. You click on the tab to display the additional information. The example shows the tabs for a part revision object.
2	**Properties**	Displays the Teamcenter properties for the object. If you check out the object, you can modify the editable properties.
3	**Preview**	Displays the associated 2D preview image for the object if one exists or the thumbnail for the Teamcenter object.

4	**Actions**	Displays the actions that you can perform on the Teamcenter object. The location of the action buttons vary based on the objects selected.
5	Options for checking out and checking in the Teamcenter object.	If you have the appropriate access, you can check out the Teamcenter object. After the checkout, you can perform any of the following options: • Check in the object to Teamcenter and save all changes. • Save the object to save all changes. Object will remain checked out to you. • Cancel the checkout to discard all changes and the checkout.

How to maintain and view Teamcenter object data

1. From the Office application, navigate to the Teamcenter object that you want to maintain or view.

   > Note:
   >
   > Internet Explorer must be updated to version 9 or above for style sheet support. If an older version of Internet Explorer is installed, you receive a warning message indicating Teamcenter will display the legacy properties dialog box. The legacy properties dialog box provides viewing of property data only.

2. Perform one of the following methods to display the Teamcenter object data in the **Properties Display** dialog box:

   - Right-click the Teamcenter object in the **Navigation- Folder view** or the **Navigation** view and choose **Properties**.
   - If the object is already open in the Office application, click **Properties** ⓘ on the **Teamcenter** tab.

   The **Properties Display** dialog box appears and is populated with the properties and other data associated with the selected Teamcenter object.

   > Note:
   >
   > The information and the actions you can perform are dependent on the Teamcenter object you have selected and your access permissions to the object.

3. In the **Properties Display** dialog box, perform any of the following actions:

- Click the **Overview** tab to display and edit properties.
  - Click **More Properties** to display all the additional properties.

    Note:

    You must check out the Teamcenter object to modify the editable properties.

- Click on any of the remaining tabs to display additional information.
- Under the **Actions** heading, click any of the actions you want to perform on the object.
- Click **Check-out** to check out the object for edit.

  If the object is checked out, you can modify any editable property values and then perform any of the following:

  - Click **Save** to save all changes and leave the object checked out.
  - Click **Check-in** to check in the object to Teamcenter and save all changes.
  - Click **Cancel** to discard all changes and cancel the checkout.

Tip:

If the **Properties Display** dialog box is already displayed for an object, you can select a different object and then the properties for that selected object appear in the dialog box.

Assign and remove objects from projects

1. From the Office application, click the **Teamcenter** tab→**Navigate** →**Folder View**.
2. In the **Navigation - Folder View** pane, right-click the object(s) you want to assign to a project, and choose **Assign/Remove Project**.
3. In the **Project Assignments** dialog box, select one or more projects from the **Available Projects for Assignment** list.
4. Click to add the selected projects to the list.
5. To remove a project assignment, select the project in the **Current/Pending Project Assignments**, and click .
6. When you are assigning a folder to a project, the **Contents** and **Folder** options are displayed in the dialog box. Select one of the following:

- **Contents**: Only the contents (first-level objects) of the folder are assigned to the selected projects.
- **Folder**: Only the folder is assigned to the selected projects.
- Both **Contents** and **Folder**: Both the contents of the folder and the folder are assigned to the selected project.
- Neither **Contents** nor **Folder**: No objects are assigned to the selected project.

7. Click **OK** to complete the project assignments.

4. Importing Teamcenter data from Microsoft Office

Creating and modifying objects with imported Office data

> Note:
>
> Client for Office import features support only versions 2010 and 2013 of Microsoft Office Word and Excel.

Client for Office works through Microsoft Office Word and Excel for exchanging Teamcenter data such as requirement specifications, functional models, and logical models.

For example, your project may employ an outside contractor to design a logical model of an implementation solution. To submit that architecture for approval or modification, the contractor can define its structure in Word or Excel and send the file to you for potential import to Teamcenter.

By importing the data from a Word or Excel file, you create or modify the structure in Teamcenter.

- If the structure does not exist in Teamcenter, it is created from the data.

  > Note:
  >
  > For a product structure, only imprecise assemblies can be created.

- If the structure exists in Teamcenter, the Teamcenter structure is updated:

  - New objects and properties in the data are added to the structure.

  - Changes in the data are applied to the latest working revisions of the corresponding objects in the structure.

  - Existing objects and property values not represented in the imported data are removed from the structure.

    > Note:
    >
    > Objects that are removed from a structure remain in Teamcenter.

> Note:
>
> - Only *imprecise* structures are created using Client for Office.

- Absolute occurrences and incremental changes are not supported.
- The import process does not configure structures in Teamcenter, for example, by defining revision rules. Only the latest working revisions are updated.

Note:

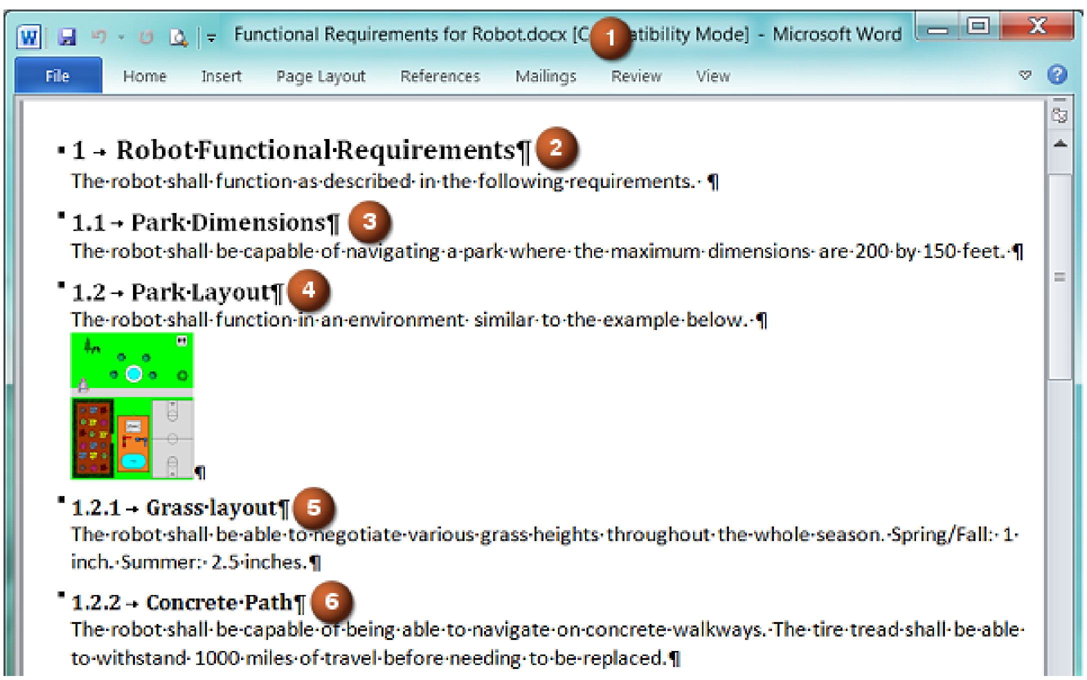
The Excel import feature is available only for the four-tier Teamcenter rich client.

Importing structures from Microsoft Word

How Word styles determine structure hierarchy in Teamcenter

You can create an entire requirement structure in one action by importing a specification document from Word. Teamcenter uses the document's Word heading styles to generate a new structure in the Systems Engineering **Requirements** view. Together, the sequence of heading styles and their numbered outline levels (1 through 9) determine the parent, child, and sibling hierarchy in the imported specification.

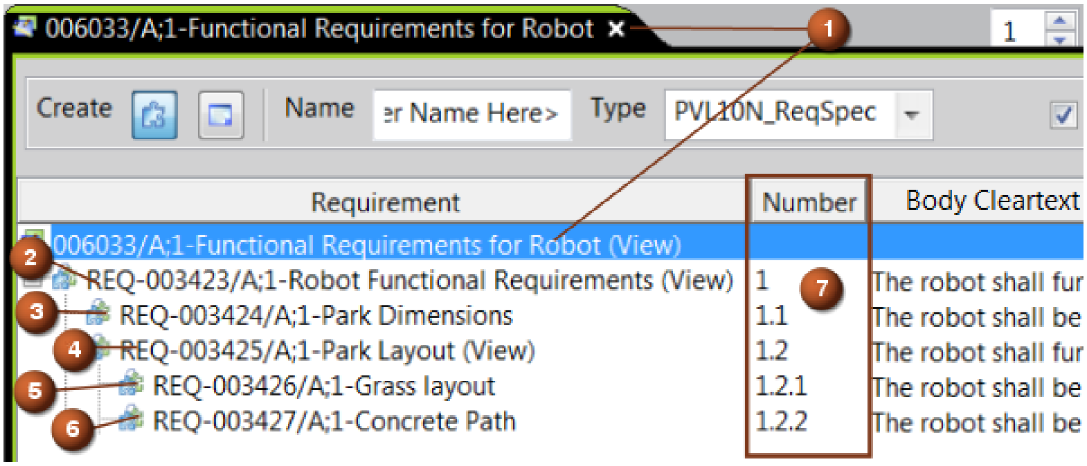
For example, assume that you create the following requirement specification:



1	Word document name
2	Word **Heading 1** style (outline level 1)
3	Word **Heading 2** style (outline level 2)

4	Word **Heading 2** style (outline level 2)
5	Word **Heading 3** style (outline level 3)
6	Word **Heading 3** style (outline level 3)

When you import the previous example document, Teamcenter generates a matching specification in the **Requirements** view:



1 The name of the Word document becomes the name of the new requirement specification. By default, the requirement specification object occupies the top level of the structure.

> Tip:
>
> You can change the top-level object type by editing the **TcAllowedImportExportPeakSpecObject** preference.

2 The text of the first heading becomes the name of the first new requirement. The heading style's outline level places the requirement at the first level below the specification.

3 The text of the second heading becomes the name of the second new requirement. The heading style's outline level places the requirement at the second level as a child of the first requirement.

4 The text of the third heading becomes the name of the third new requirement. The heading style's outline level places the requirement at the second level as a sibling of the second requirement.

5 The text of the fourth heading becomes the name of the fourth new requirement. The heading style's outline level places the requirement at the third level as a child of the third requirement.

6	The text of the fifth heading becomes the name of the fifth new requirement. The heading style's outline level places the requirement at the third level as a sibling of the fourth requirement.
7	In the **Number** property column, each value matches the numbered outline level of that requirement's heading in the Word document.

All Word content below a given heading style becomes the content of the corresponding requirement. Requirement content can include elements such as graphics and tables.

Note:

The **Body Cleartext** property column displays only the text portion of the content.

Caution:

- Special characters in Word heading styles are replaced by question marks (**?**) in the imported requirements. If those requirements later are exported to Word, the question marks are included in the output document.

- If the document does not begin with a Word heading style, the import process generates a requirement named **NO TITLE** immediately below the top-level object. This requirement receives all content from the beginning of the document to the first Word heading style, or the entire content if there is no heading style.

Generating separate requirements within a Word outline level

Note:

Teamcenter Extensions for Microsoft Office must be installed on your computer.

Within an outline level in the import document, further separation of requirements can be achieved through *keywords*. You can enter one or more keywords in the Import Spec wizard when you import a requirement specification.

Starting with the first Word heading style, the parser searches the body content for the keyword or keywords.

- If one keyword is found before the next outline level, the requirement starts after the nearest outline level preceding the keyword:

  - The text of the immediately preceding outline level paragraph becomes the requirement name.

  - All material under the outline level paragraph becomes the requirement content. The paragraph itself does not appear in the content.

  - The requirement has the subtype that you assign.

- If two or more keywords are found before the next outline level, the requirements are separated as follows:

  - The first requirement starts after the nearest outline level preceding the first keyword.

  - The second requirement starts after the nearest paragraph separator preceding the second keyword. This requirement is created as a child of the first requirement.

  - For each subsequent keyword, the nearest preceding paragraph separator begins the requirement, which becomes a child of the first requirement and a sibling of the preceding one.

  Note:

  If keywords are found within the same content paragraph, sentence separators are used instead of paragraph separators. If two or more keywords are found in the same sentence, a requirement is created only for the first keyword.

  The name of each requirement is the text of the immediately preceding outline level paragraph. All requirements have the same subtype, which you assign.

  Note:

  Keywords in tables are ignored. Separate requirements are not created for this content.

If no keyword is found in the content before the next heading style the heading text becomes the requirement name, and contains all material under that heading. The document heading does not appear in the requirement content.

At the next outline level, the parser repeats the processing described.

Import a structure from a Word document

Note:

Client for Office import features support Microsoft Office Word versions 2010 and 2013 only.

Caution:

- In the import document, verify that the outline levels of the Word heading styles match the intended object hierarchy of the new structure.

- To parse the document by keywords, Teamcenter Extensions for Microsoft Office must be installed on your computer.

1. With the import document open, choose **Specifications→Import** on the **Teamcenter** ribbon.

   > Note:
   >
   > If the **Teamcenter Login** dialog box displays, enter your Teamcenter user name and password, and then click **Login**.

   The **Import Specification** dialog box displays.

   > Note:
   >
   > In the **Select Specification Type** list, you can accept the default value, **RequirementSpec**, or you can select another specification type.
   >
   > You can exclude specification types from the list.

2. Do one of the following:

Parse the document by outline levels only	a. Select **Import as single subtype**. b. In the list to the right, select **Requirement**, **Paragraph**, or a custom subtype defined in your Teamcenter environment. The selected subtype is assigned to each new requirement in the specification.
Parse the document by both outline levels and keywords	a. Select **Use keywords for import**. The **Keywords** box and the **=** list become available. b. Type the keyword or keywords in the box. Note: • Use a comma to separate two keywords. • Special characters and partial words are not supported. c. In the **=** list, select the subtype to assign to each new requirement in the specification.

3. Click **Import**.

   In Systems Engineering, the top-level object in a structure is a requirement specification object. Below the specification object, parent, child, and sibling requirement objects occupy structure levels determined by the outline levels in the import document.

Previewing a requirement structure in Client for Office

Preview a requirement structure prior to import

Before you import a requirement structure from Word to Teamcenter, you can preview the structure in the Client for Office **Requirements** pane. This enables you to determine if the document is structured correctly before you actually import the data to Teamcenter.

You can preview Word documents with structure parsing or keyword parsing:

- *Structure parsing* parses the word document by using the **Heading** styles to set the requirement structure levels and requirement types.
- *Keyword parsing* parses the word document based on keywords to set the requirement structure levels and requirement types.

In the preview document, you can:

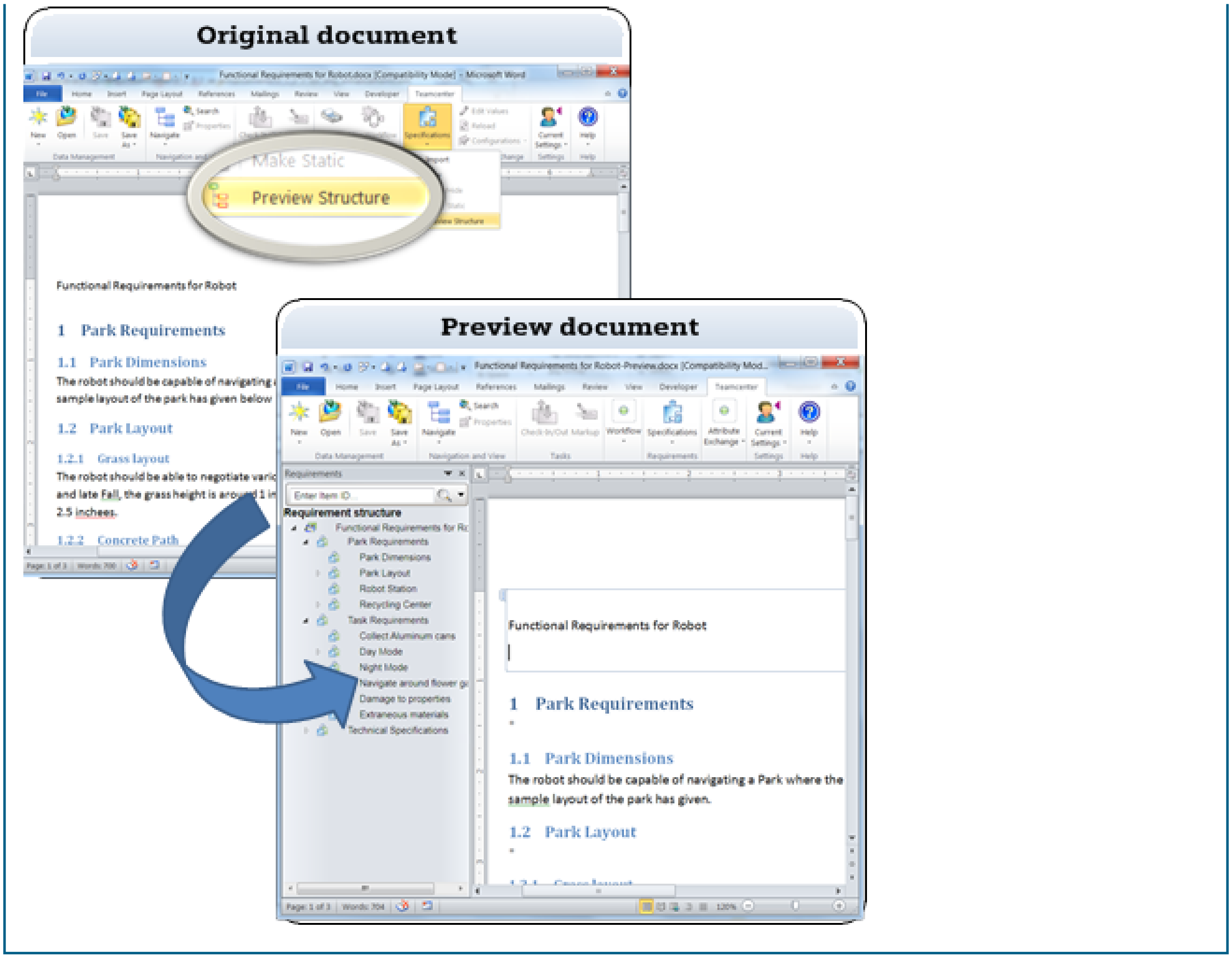
- Navigate the requirement structure by clicking on the nodes in the document.
- Make the necessary changes to the structure, such as changing the requirement level or object type, before importing the requirement to Teamcenter.

Note:

Changes that you make in the preview document apply only to the preview structure. The original document and structure remain unchanged.

Example:

As the following figures shows, the preview document displays the **Requirements** pane containing the previewed requirement structure.

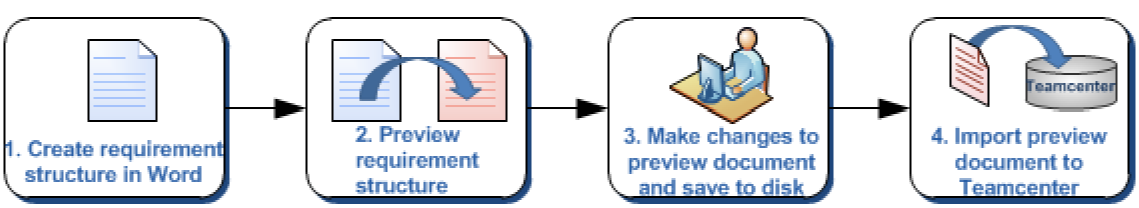


If you have previewed a document and want to make further modifications, perform the following steps:

1. Close the previewed document.
2. Open the document and make the required changes.
3. Preview the document.

Process for previewing a requirement structure prior to import

Previewing a requirement structure prior to import is part of a four-step process:



1. Create the requirement structure in Word.

2. From Word, preview the requirement structure to display what the requirement structure will look like when it is imported into Teamcenter. The new preview document has the text **-Preview** appended to the original file name.

3. Make any required changes to the preview document and optionally save the preview document to disk using a different file name.

   From the preview document, you can make the following changes to the requirement structure *before* importing:

   - Add or delete requirement objects.
   - Copy or move requirement objects.
   - Reorder the requirement structure by demoting or promoting requirement objects.
   - Change the requirement type for a requirement object.
   - Assign a requirement ID to a requirement object.

     > Note:
     >
     > If you do not assign a Teamcenter ID, the ID is automatically generated for the requirement objects by the Teamcenter import process.

   > Note:
   >
   > Changes apply to the preview document only. The original document is not affected.

4. Import the preview document to Teamcenter.

   When you import the preview document to Teamcenter, the requirement structure is created in Teamcenter.

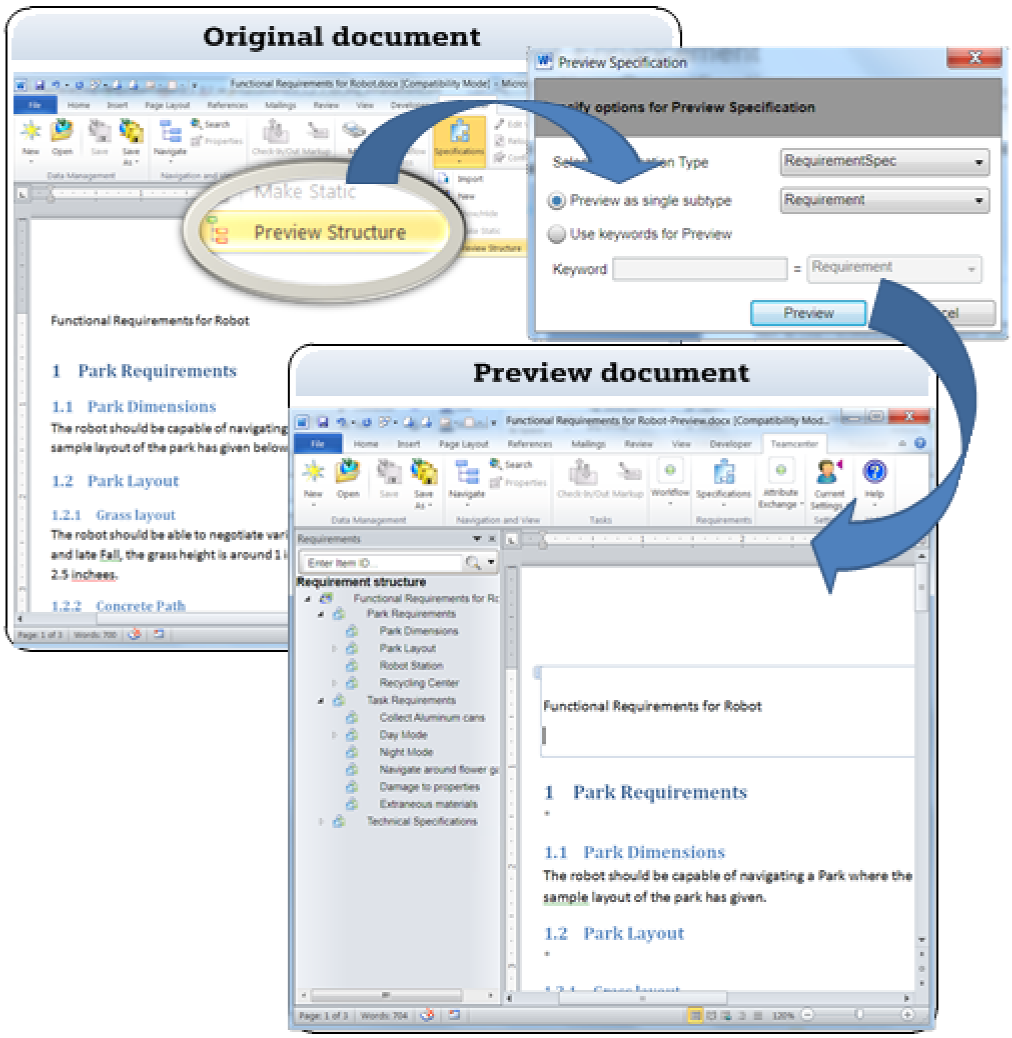
Previewing a requirement structure using structure parsing

When you preview a document by using *structure parsing*, you use the **Heading** styles in Word to set requirement structure levels and requirement types. You set the requirement object type that you want to use for the headings.

Structured documents contain the heading levels needed to define the structure. When you preview a structured document, the requirement levels in the preview document are determined by the heading level position.

Example:

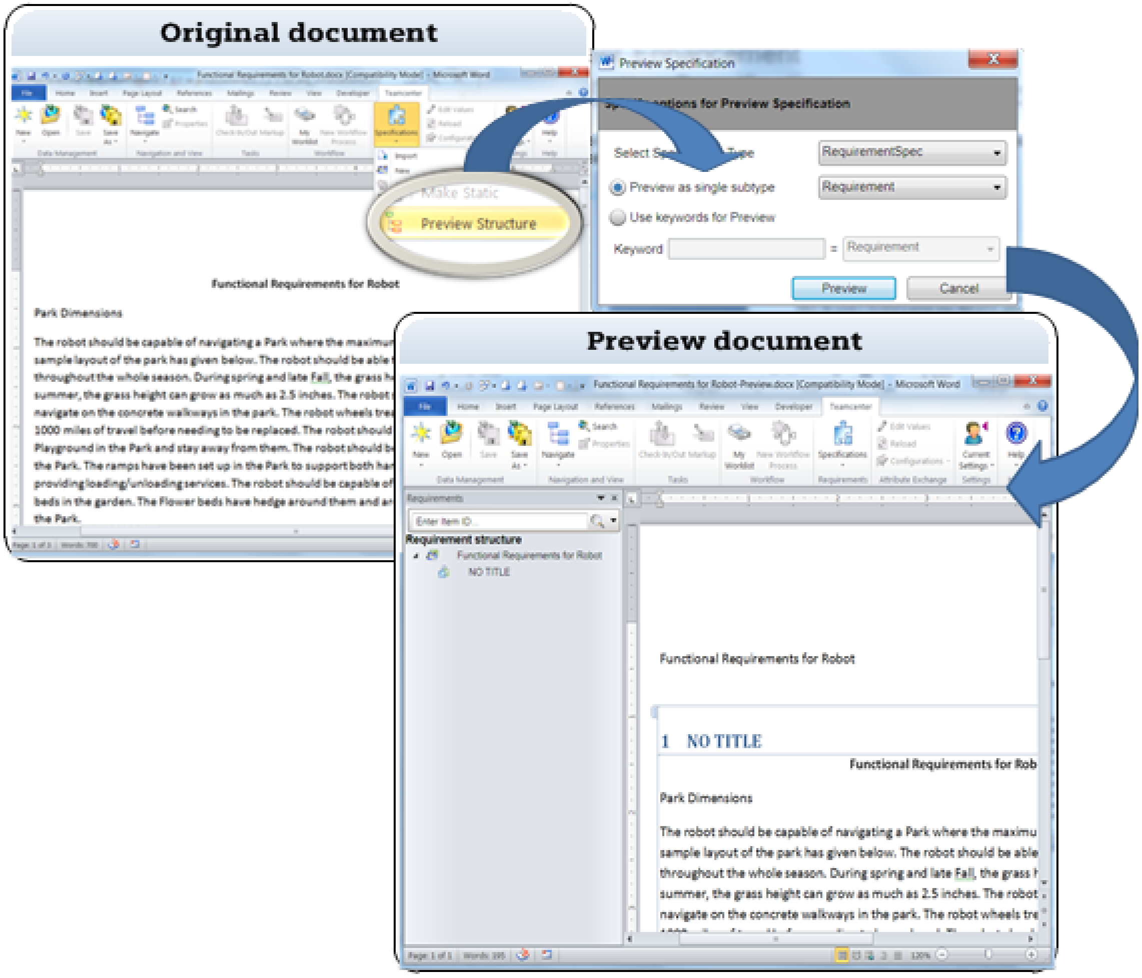
The following example shows previewing a structured document with headings using the **Requirement** object type as the type for displaying the headings in the preview document.



Unstructured documents do not contain heading levels or numbered paragraphs.

Example:

The following example shows previewing a document with no headings using the **Requirement** object type. Because the document contains no headings for determining requirement-level positions, all the content is lumped into one requirement.



Previewing a requirement structure using keyword parsing

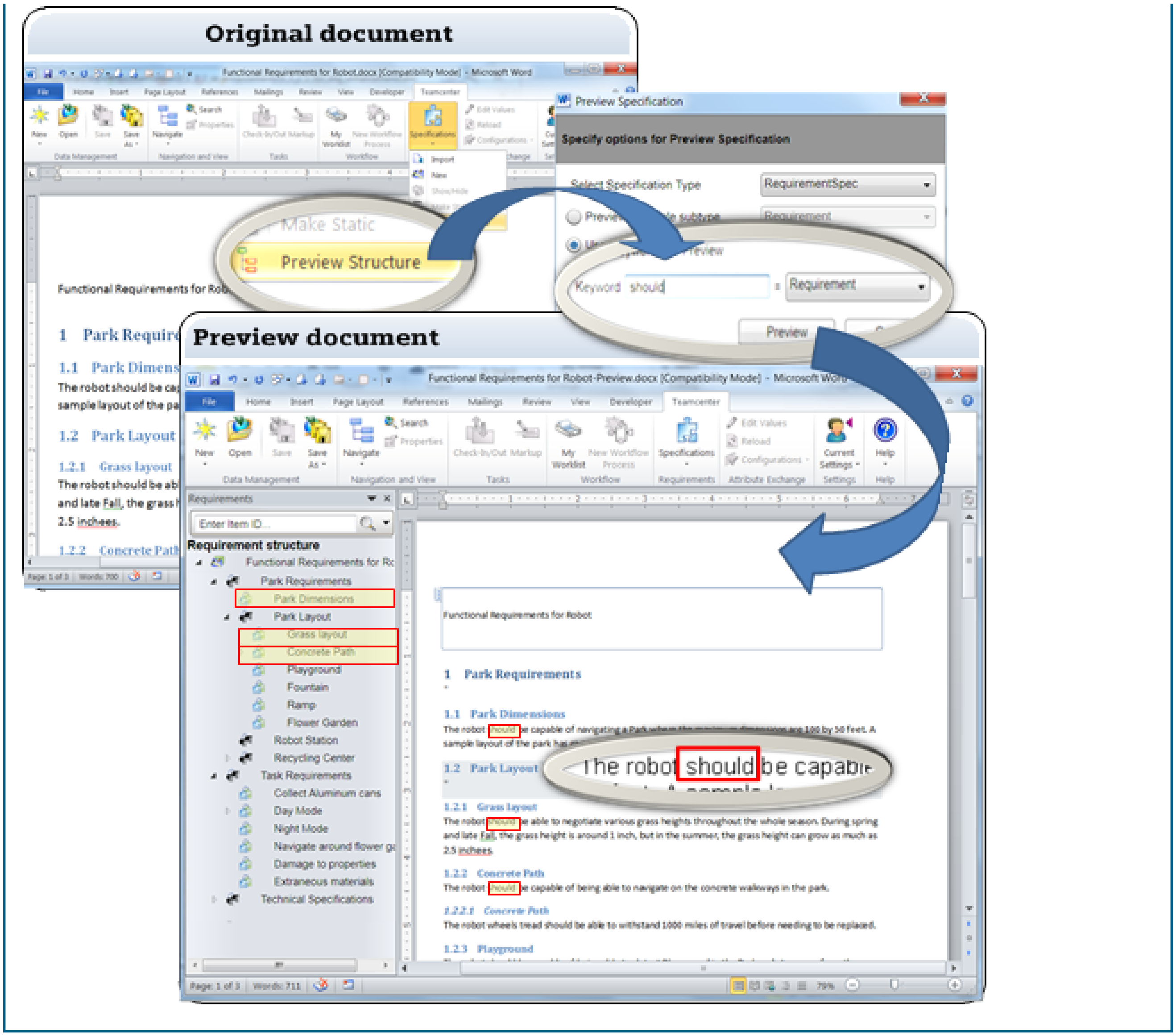
When you preview a document by using *keyword parsing*, you use keywords to set the requirement structure levels and requirement types. You specify the keywords and the corresponding requirement object type you want to create for the numbered paragraphs containing the keywords.

Note:

For object types that are created from keyword parsing, the **Move Up**, **Move Down**, **Promote**, and **Demote** commands are *not* available for editing the preview document.

Example:

The following example shows using the **should** keyword to specify the content in the Word document to be assigned the **Requirement** object type in the preview document. The resulting preview document displays all the paragraphs in the original document containing the **should** keyword as **Requirement** object types in the preview document.



How to preview a requirement structure

> Caution:
>
> When you open an offline Word document containing a structure, click **Yes** when a message asks if you want to connect to Teamcenter.
>
> If the **Teamcenter Login** dialog box is displayed, enter your Teamcenter user name and password, and then click **Login**.

1. On the **Teamcenter** tab of Word's Office ribbon, select **Specifications→Preview Structure**.

   The **Preview Specification** dialog box is displayed.

2. In the **Select Specification Type** list, select the requirement specification type that you want to use for the preview.

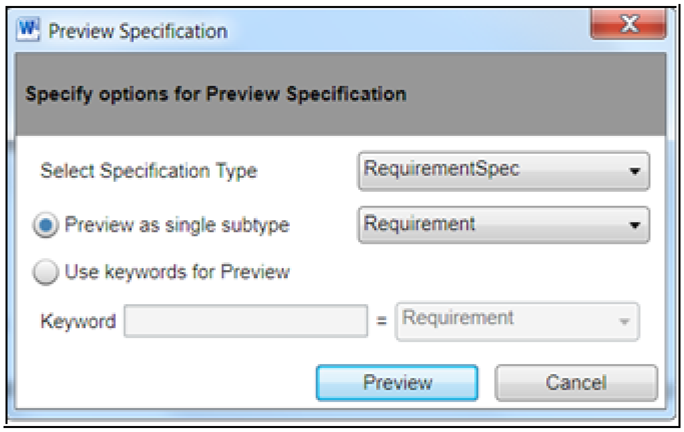
   The default requirement specification type is **RequirementSpec**.

   > Note:
   >
   > When you are connected and logged in to Teamcenter, the **Select Specification Type** list displays custom subtypes if they are added as values of the **TCAllowedChildTypes_RequirementSpec** and **TCAllowedChildTypes_Requirement** preferences.

3. For *structured* parsing, perform the following steps:

   a. Select the **Preview as single subtype** option.

   b. Click the ▼ button in the box next to the **Preview as single subtype** option and choose the object type you want to use for previewing the objects located under the specification.

   The default object type for the subtype is **Requirement**. You can change the object types after the preview document has been generated.

   > Note:
   >
   > When you are connected and logged in to Teamcenter, the list displays custom subtypes if they are added as values of the **TCAllowedChildTypes_RequirementSpec** and **TCAllowedChildTypes_Requirement** preferences.

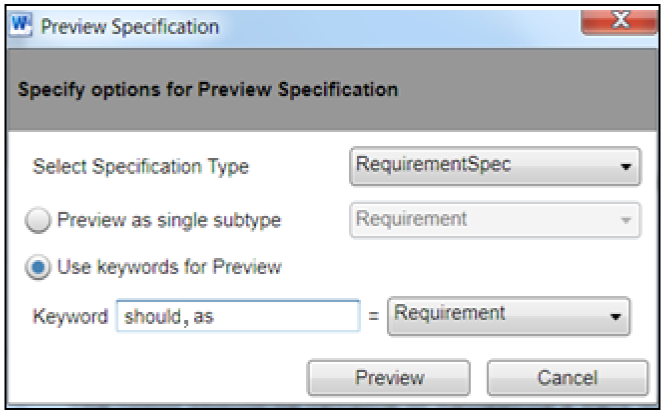
4. For *keyword* parsing, perform the following steps:

   a. Select the **Use keywords for Preview** option.

   b. In the **Keyword** box, type the keywords you want to use to set the requirement object type for the paragraphs containing the keywords.

Use a comma to separate keywords.

c. Click the ▼ button in the box next to the **Keyword** box and choose the object type you want to use for previewing the objects containing the keywords.



The default object type for the type specified by the keywords is set to **Requirement**. You can change the object types after the preview document has been generated.

> Note:
>
> When you are connected and logged in to Teamcenter, the list displays custom subtypes if they are added as values of the **TCAllowedChildTypes_RequirementSpec** and **TCAllowedChildTypes_Requirement** preferences.

5. Click **Preview** to generate the preview document for the requirement structure.

   A new window is displayed with the preview document. The preview document includes a **Requirements** pane in which the requirement structure appears.

   The file name for the new preview document has the text **-Preview** appended to the original file name.

6. Navigate and edit the requirements structure in the preview document, as needed.

7. Save any changes to the preview document.

> Note:
>
> To commit the changes to Teamcenter, you must import the preview document to Teamcenter.

Editing a preview document

Add or delete requirement objects

1. In Word, generate a preview document for the requirement structure.

2. To add a new object with a specific type, perform the following steps:

    a. In the preview document, right-click the target object location in the **Requirements** pane where you want to add a new requirement object and choose ⊕ **New...**

    b. In the **Create New** dialog box, for the object type, click the ▼ button and choose the object type you want to use for the new object.

    c. In the **Name** box, type the name of the new object.

    d. Click **OK**.

    The new object appears below the target object in the **Requirements** pane and in the document.

3. To add a new object using the same type as the target object, perform the following steps:

    a. In the preview document, right-click the target object location in the **Requirements** pane where you want to add a new requirement object, and then choose ⊕ **New**.

    The new object appears below the target object in the **Requirements** pane and in the document using the same type as the target object.

4. To remove an object from the requirement structure:

    a. In the preview document **Requirements** pane, right-click the object that you want to remove from the structure and choose **Mark for Deletion**.

    A red strike-through marks the following:

    - The selected object in the **Requirements** pane.
    - The related content in the Word document window.
    - All lower level objects in the **Requirements** pane and their content in the document window.

> Note:
>
> The marked objects are removed from the structure when you commit changes to Teamcenter.

Copy or move requirement objects

1. In Word, generate a preview document for the requirement structure.

2. To *copy* a requirement object, perform the following steps:

   a. In the preview document **Requirements** pane, right-click the requirement object that you want to copy and choose **Copy**.

   b. In the preview document **Requirements** pane, right-click the location in the structure where you want to copy the requirement object, and then choose **Paste**.

      The requirement object is copied to the specified location in the structure.

3. To *move* a requirement object, perform the following steps:

   a. In the preview document **Requirements** pane, right-click the requirement object that you want to move and choose **Cut**.

   b. In the preview document **Requirements** pane, right-click the location in the in the structure where you want to copy the requirement object and choose **Paste**.

      The requirement object is moved to the specified location.

Reorder requirement objects

1. In Word, generate a preview document for the requirement structure.

2. To move an object up one level higher in the structure, in the preview document **Requirements** pane, right-click the requirement object that you want to move and choose **Promote**.

   The requirement object is moved up one level in the structure.

3. To move an object down one level lower in the structure, in the preview document **Requirements** pane, right-click the requirement object that you want to move, and then choose **Demote**.

   The requirement object is moved down one level in the structure.

4. To move an object up one position in the structure within the same level, in the preview document **Requirements**, right-click the requirement object, and then choose **Move Up**.

The requirement object is moved up one position within the same level in the structure.

5. To move an object down one position in the structure within the same level, in the preview document **Requirements**, right-click the requirement object that you want to move, and then choose **Move Down**.

   The requirement object is moved down one position within the same level in the structure.

Assign Teamcenter IDs to requirement objects

1. In Word, generate a preview document for the requirement structure.
2. In the preview document, select the requirement objects that you want to assign a Teamcenter ID.
3. Right-click and choose **Assign Type**.
4. In the **Item ID** box, type the ID or click **Assign ID** to automatically generate an ID from predefined naming rules. If you selected multiple objects, you must click **Assign ID** because you cannot type the ID.

   A dialog appears with a progress bar indicating that Teamcenter is generating the new IDs. If you only selected one object, the new ID is generated and displayed in the **Item ID** box. If you selected multiple objects, the new IDs are generated, but no value appears in the **Item ID** box.

5. Click **Apply**.

   The requirement objects are assigned the Teamcenter IDs.

   > Note:
   >
   > If you do not assign a Teamcenter ID, the ID is automatically generated for the requirement objects by the Teamcenter import process.

Change requirement object types

1. In Word, generate a preview document for the requirement structure.
2. In the preview document, select the requirement objects for which you want to change the object type.
3. Right-click and choose **Assign Type**.
4. In the **Assign Type** dialog box, click ▼ button in the **Select Object Type** box and choose the object type for the selected requirement objects.
5. Click **Apply**.

The requirement objects are changed to the specified object type.

Save a preview document

1. In Word, generate a preview document for the requirement structure.

2. In the preview document, choose **File→Save As**.

3. In the **Save As** dialog box, type the name for the preview document in the **File Name** box.

4. Click **Save**.

   The preview document is saved to disk.

   > Note:
   >
   > To commit the changes to Teamcenter, you must import the preview document to Teamcenter.

Importing object data from Microsoft Office Excel

Excel import process overview

Client for Office works through Microsoft Office Excel for exchanging Teamcenter structures such as requirement specifications, functional models, logical models, and product structure assemblies.

For example, your project may employ an outside contractor to design a logical model of an implementation solution. To submit that architecture for approval or modification, the contractor can define its structure in Excel and send the file to you for potential import to Teamcenter.

By importing the Excel data, you can create or modify the structure in Teamcenter.

- If the structure does not exist in Teamcenter, it is created from the Excel data.

  Only imprecise assemblies can be created for a product structure.

- If the structure exists in Teamcenter, the Teamcenter structure is updated from the Excel data:

  - New objects and properties in the Excel data are added to the structure.

  - Changes in the Excel data are applied to the latest working revisions of the corresponding objects.

  - Existing objects and property values not represented in the Excel data are removed from the structure. Removed objects remain in Teamcenter.

Caution:

When you perform an Excel import, runtime properties are not updated. Only persistent properties are updated or set during an Excel import.

Caution:

Properties with dynamic and cascading lists of values (LOVs) cannot be modified in the target structure. If the Excel input file contains these LOV property types, the validation test generates an error message.

Note:

- Only *imprecise* structures can be imported.
- Absolute occurrences and incremental changes are not supported.
- The import process does not configure structures in Teamcenter, for example, by defining revision rules. Only the latest working revisions are updated.
- The Excel import feature is available only for the four-tier Teamcenter rich client.

Client for Office includes a wizard that guides you through the import process. You begin by opening the Excel file that contains the data to import. Then, you click the **Import to Teamcenter** button on the **Teamcenter** ribbon to start the wizard.

Preparing data to import from Excel

There are two ways to obtain data for the Excel import process:

- Generate offline Excel file that combines object data and control instructions.

  You can generate an offline file when you export data from the Teamcenter rich client to Excel. The data and the control instructions are inserted on separate sheets. You can add, modify, and delete data before the import.

- Build Excel input files manually, defining the data in one file and control instructions in a separate file.

  You can also use input files that you receive from an external source, such as a design contractor who does not have Teamcenter.

> Caution:
>
> To define control instructions manually, you must understand the data in each data file column and the way in which the data relates to the Teamcenter schema. Siemens Digital Industries Software recommends that control files be defined only by Teamcenter administrators.

You must associate the data file with the correct control file during the import procedure. If you have questions about the correct control file for your data, consult your Teamcenter administrator.

Working in offline Excel import files

Data and control information can be combined in a single Excel file. You can create this file when you export data from the Teamcenter rich client to Excel.

In the **Export to Excel** dialog box, choose the **Work Offline and Import** option to generate a preconfigured file automatically.

- The data conforms with the mapping information because Teamcenter outputs them both from the same context.
- The data and the mapping information are inserted on separate sheets.
- The data can be imported without associating a separate control file.

You can save the offline file locally, and edit the data to modify the corresponding structure in Teamcenter. Changes are applied in Teamcenter when the import process is complete.

> Caution:
>
> - Before importing edited data, you must also edit the control sheet to conform with the data sheet.
> - The **Multi choice** property is not supported with Excel import using the **Work offline and import** option.
> - Properties with dynamic and cascading lists of values (LOVs) cannot be modified in the target structure. If the Excel input file contains these LOV property types, the validation test generates an error message.
> - Excel import does not support string array LOV properties. Single choice LOV is supported but this list of values is not displayed. You must fill in the values in Excel and then import the Excel file.

Generate an offline Excel file

You can export Teamcenter objects to an Excel file that is preconfigured for the Excel import process.

In the Teamcenter **Export to Excel** dialog box, select the **Work Offline and Import** option to generate an output file that you can save outside of Teamcenter. You can then edit the data in the output file offline, and use the file at a later time to import object data from Excel. Your edits are applied in Teamcenter when the import is complete.

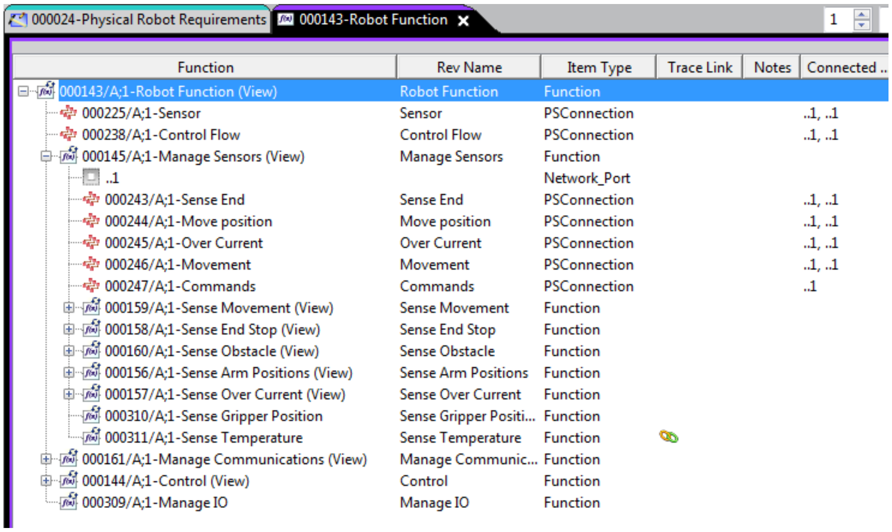
Caution:

- Only items, item revisions, and their subtypes can be imported from offline Excel files. However, it is possible to export objects of other types from Teamcenter.

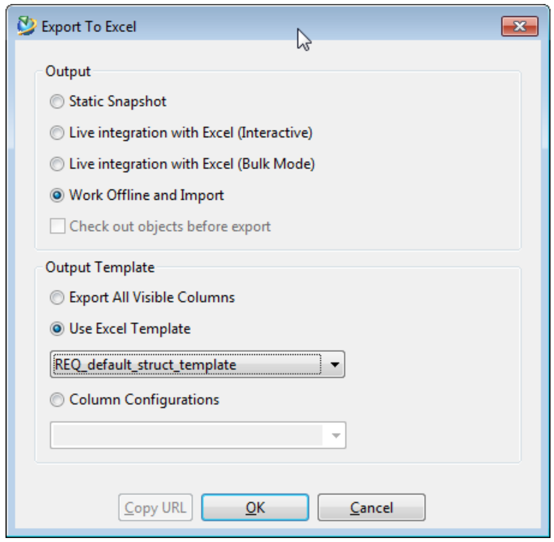
  Before you start the export process, ensure that you do not select objects based on types other than **Item** and **Item Revision**. Otherwise, attempts to import such offline data fail without notification.

- Properties with dynamic and cascading lists of values (LOVs) cannot be modified in the target structure. If the Excel input file contains these LOV property types, the validation test generates an error message.

1. Select the top-level object in a structure and then choose **Tools→Export→Objects to Excel**.



2. In the **Export to Excel** dialog box, select **Work Offline and Import**.

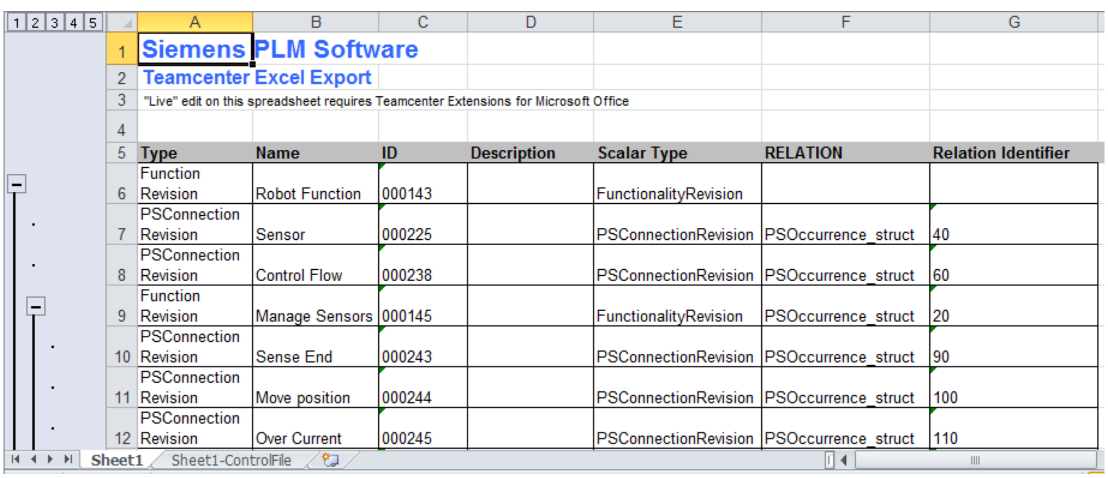


3. Under **Output Template**, select **Use Excel Template**, and then select the export template from the list.

4. Click **OK**.

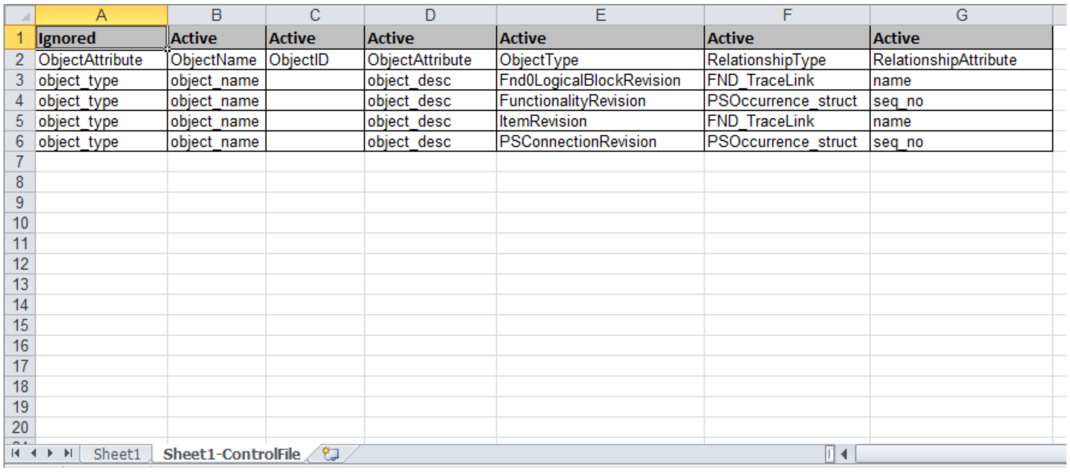
   Teamcenter configures the Excel output file with two worksheets.

   - **Sheet1** contains the property data that is specified by the export template.



Type	Name	ID	Description	Scalar Type	RELATION	Relation Identifier
Function Revision	Robot Function	000143		FunctionalityRevision		
PSConnection Revision	Sensor	000225		PSConnectionRevision	PSOccurrence_struct	40
PSConnection Revision	Control Flow	000238		PSConnectionRevision	PSOccurrence_struct	60
Function Revision	Manage Sensors	000145		FunctionalityRevision	PSOccurrence_struct	20
PSConnection Revision	Sense End	000243		PSConnectionRevision	PSOccurrence_struct	90
PSConnection Revision	Move position	000244		PSConnectionRevision	PSOccurrence_struct	100
PSConnection Revision	Over Current	000245		PSConnectionRevision	PSOccurrence_struct	110

   - **Sheet1-ControlFile** contains instructions for processing the property data.



	A	B	C	D	E	F	G
1	Ignored	Active	Active	Active	Active	Active	Active
2	ObjectAttribute	ObjectName	ObjectID	ObjectAttribute	ObjectType	RelationshipType	RelationshipAttribute
3	object_type	object_name		object_desc	Fnd0LogicalBlockRevision	FND_TraceLink	name
4	object_type	object_name		object_desc	FunctionalityRevision	PSOccurrence_struct	seq_no
5	object_type	object_name		object_desc	ItemRevision	FND_TraceLink	name
6	object_type	object_name		object_desc	PSConnectionRevision	PSOccurrence_struct	seq_no

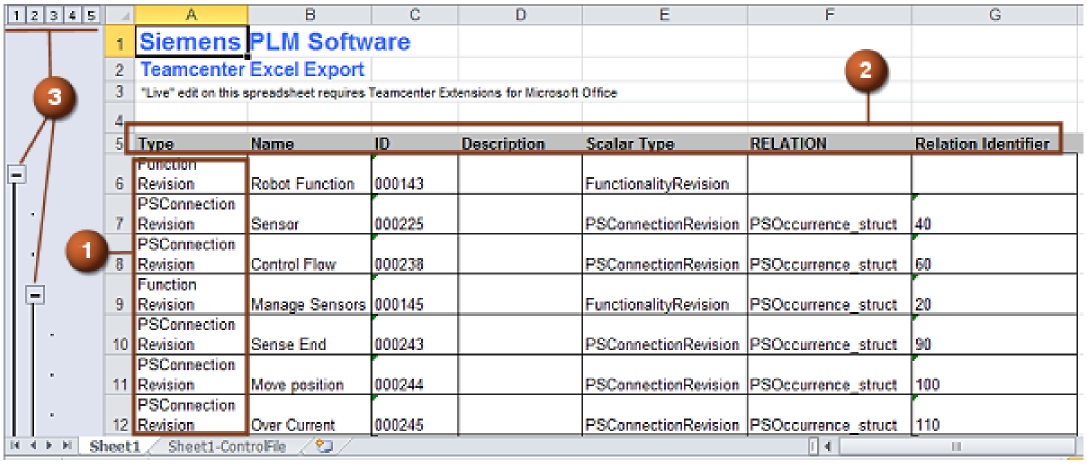
Note:

The output file contents vary according to the type of structure and the export template that you select. For a wider sample, experiment with other structures and different templates.

Understanding the contents of a data sheet

In the **Export to Excel** dialog box, the **Work Offline and Import** option generates structure data in a spreadsheet that is automatically configured for importing.

- The rows represent the objects in a structure hierarchy such as functions or logical blocks in a design model, including interfaces, connections, and relationships among objects.
- The columns contain the Teamcenter properties that are specified by the selected export template, and the property values for each object in the structure rows. For example:
  - Object types, object names, and object identifiers.
  - **PSOccurrence** relationships and Generic Relation Management (GRM) rules.
  - Relationship properties such as reference designators, budget values, and quantities.



1 Structure objects

2 Object properties

3 Excel **Outline** features

Tip:

To hide an object’s children, click the minus sign (**-**) for that object. Click the plus sign (**+**) to show the children.

Caution:

Properties with dynamic and cascading lists of values (LOVs) cannot be modified in the target structure. If the Excel input file contains these LOV property types, the validation test generates an error message.

Default columns for offline Excel files

By default, Teamcenter inserts three different property columns in every output file exported with the **Work Offline and Import** option in the **Export to Excel** dialog box.

Warning:

Do not delete any of the default columns. If the data sheet does not contain all of the default columns, import processing stops and the entire transaction is rolled back.

Note:

- The default columns are inserted whether or not they are specified in the Excel template that you select for the export.

- You can rename the default columns using any names you want.

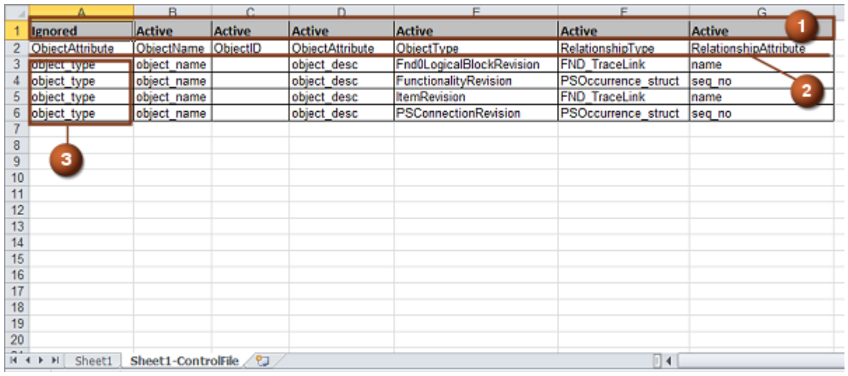
Column name	Description
Object ID	Teamcenter object identifier for the corresponding structure element. Note: When editing the data, you can automatically populate empty cells with the next available identifiers from Teamcenter. 1. On the Excel ribbon's **Teamcenter** tab, click the text portion of the **Import to Teamcenter** button. 2. In the list, select **Assign Teamcenter IDs**. Empty cells for folder identifiers cannot be populated automatically.
Object Type	Teamcenter object type for the corresponding structure element. Note: Cells in this column contain the exact names of the object types in the Teamcenter schema.
Object Name	Name of the corresponding element in the Teamcenter structure.

Control sheet contents and import processing

A control sheet is a table of instructions that govern the Excel import process. Its columns map the data sheet objects to Teamcenter schema elements such as object types, relationship types, and object and relationship properties.

> Caution:
>
> Properties with dynamic and cascading lists of values (LOVs) cannot be modified in the target structure. If the Excel input file contains these LOV property types, the validation test generates an error message.

The processing instructions consist of *keywords*, keyword *tags*, and tag *values*. The import process uses this information to build a temporary structure in memory



1	Keywords
2	Keyword tags
3	Keyword tag values

1. *Keywords* specify which data sheet columns are parsed into the temporary structure, and which are excluded from processing.

Keyword	Description
Ignored	The column is excluded from processing.
Active	Individual cell values map to the corresponding structure objects.

2. Immediately below a keyword, the *keyword tag* associates that column with a Teamcenter schema element (object property or attribute).

3. The cells in the keyword tag column include the *keyword tag values* (schema names) potentially associated with the Teamcenter schema element (keyword tag).

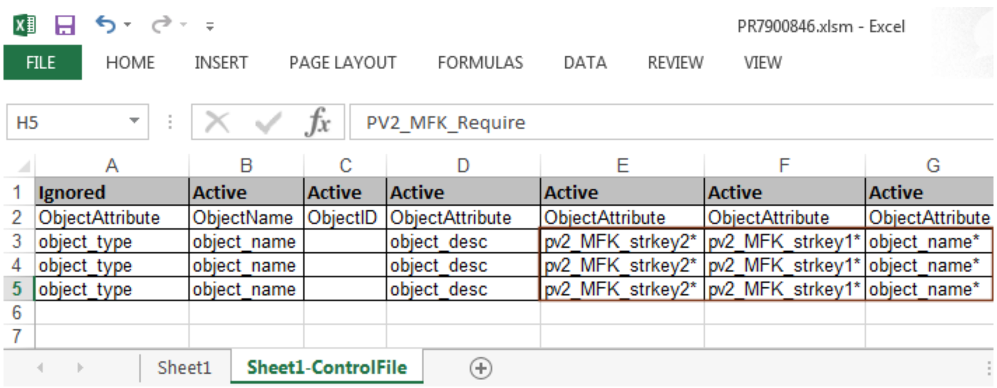
Keyword tag	Tag value
ObjectName	Schema name of the object name property.
ObjectID	Blank. Teamcenter assigns object identifiers and populates this column automatically.
ObjectAttribute	Schema name of the property in the related data sheet column.
ObjectType	Schema name of the object type.

Keyword tag	Tag value
RelationshipType	Schema name of the relation type.
RelationshipAttribute	Schema name of the property in the related data sheet column.

Working with Multi Field Key (MFK) objects

Note the following when using Teamcenter Excel import for Multi Field Key (MFK) objects, such as an MFK requirement:

- To create a new MFK type of object, fill in all the mandatory MFK properties in the **Sheet 1** sheet in the Excel file. Mandatory properties are marked with an asterisk in the **Sheet1-ControlFile** sheet. For example, note that in the **Sheet1-ControlFile** sheet, **pv2_MFK_strkey1**, which is a mandatory MFK property name, is written as **pv2_MFK_strkey1*** as **ObjectAttribute**.



	A	B	C	D	E	F	G
1	Ignored	Active	Active	Active	Active	Active	Active
2	ObjectAttribute	ObjectName	ObjectID	ObjectAttribute	ObjectAttribute	ObjectAttribute	ObjectAttribute
3	object_type	object_name		object_desc	pv2_MFK_strkey2*	pv2_MFK_strkey1*	object_name*
4	object_type	object_name		object_desc	pv2_MFK_strkey2*	pv2_MFK_strkey1*	object_name*
5	object_type	object_name		object_desc	pv2_MFK_strkey2*	pv2_MFK_strkey1*	object_name*
6							
7							

- For updating an MFK object, ensure that you add all the MFK property values in the **Sheet 1** tab. If you have not provided all values that are mandatory for the MFK object, a **Multiple object found** error is displayed because the software is not able to uniquely identify the object.

  To identify the mandatory properties of an object, see the fields marked with an asterisk in the respective **Create** *object* dialog box.

Excel import validation tests

When you initiate the import process, it parses the Excel data into an intermediate structure in memory. Then, it runs a series of tests against that structure.

Test	Description
Control sheet validation	Checks the context tags and the rule table against the Teamcenter schema. • If the control sheet does not match the schema, cancel the process, correct the sheet, and re-initiate the process.

Test	Description
	• If the information matches, you can continue the import.
Column mapping verification	Tracks the validated rule table information to the data sheet columns and displays that mapping for your verification. You can continue with the displayed mapping. Or, cancel the process, make corrections, and re-initiate the process.
Data error detection	Examines each data sheet cell value for compliance with the format of the related property type. • If any value does not conform, processing stops and the entire transaction is rolled back. Correct the data sheet and re-initiate the process. • If all values conform, the data is committed to Teamcenter.

Caution:

The **Outline** features must be enabled on Excel's **Data** tab.

Editing offline Excel files for modifications in Teamcenter

Updates for Teamcenter structures and objects

Edits you make in an offline Excel file result in updates to the Teamcenter structure and object data when the Excel import process is complete. You must also edit the control sheet to conform with the data sheet.

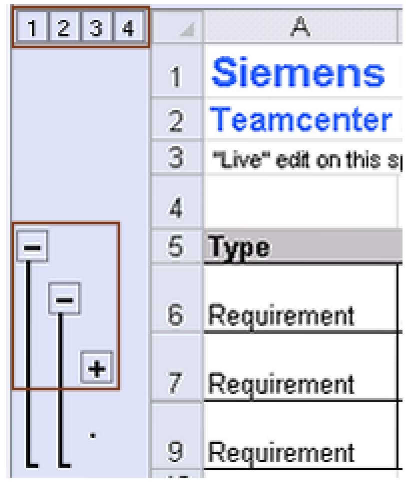
Caution:

Only items, item revisions, and their subtypes can be imported from offline Excel files. Ensure that the file does not contain objects based on types other than **Item** and **Item Revision**. Otherwise, attempts to import such objects fail without notification.

- Create and remove objects in the target structure.

  Tip:

  You can show and hide structure levels by clicking Excel's numbered outline symbols or the plus signs (**+**) and minus signs (**-**).



- Create, modify, and remove object properties in the target structure.

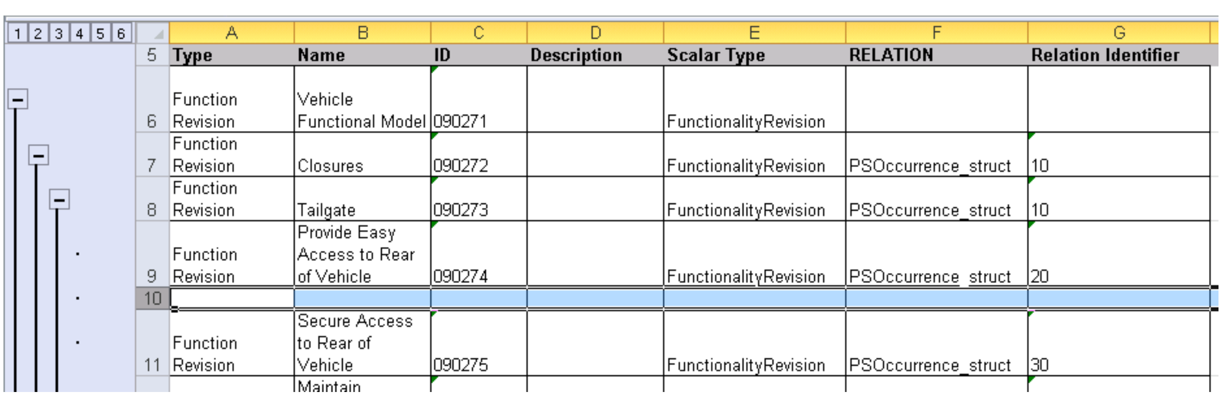
> Caution:
>
> Properties with dynamic and cascading lists of values (LOVs) cannot be modified in the target structure. If the Excel input file contains these LOV property types, the validation test generates an error message.

Create an object in the target structure

For each object that you create in a structure, Teamcenter generates an item first, and then an item revision. You must add a row for the base item type in both the data sheet and control sheet.

> Caution:
>
> Only items, item revisions, and their subtypes can be imported from offline Excel files. Attempts to import other object types fail without notification.

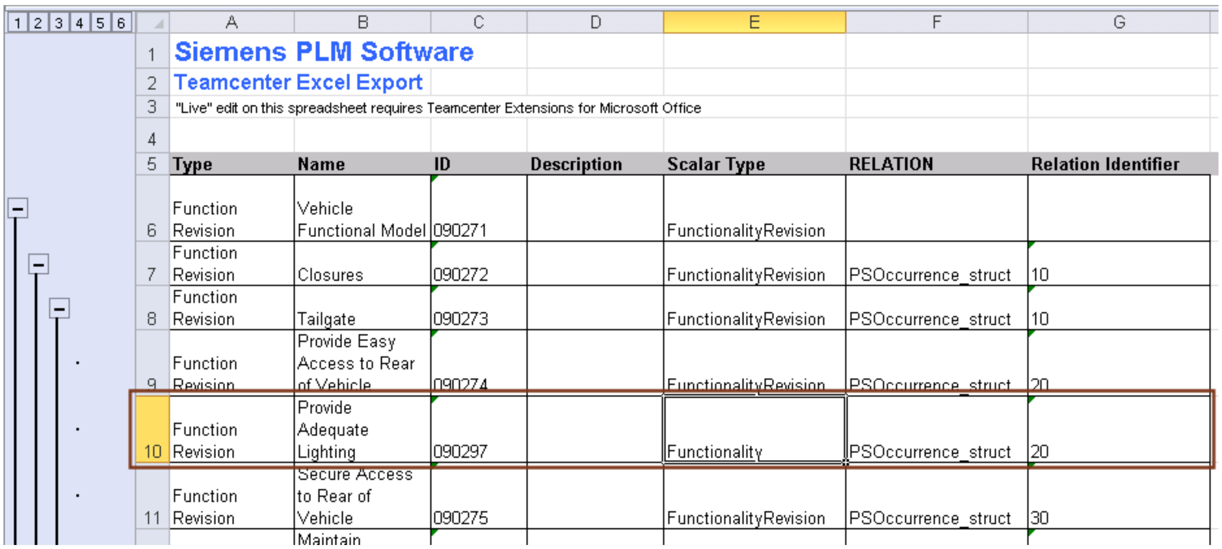
1. In the Excel data sheet, insert a new row at the level and position where you want to create the object in Teamcenter.



	A	B	C	D	E	F	G
5	Type	Name	ID	Description	Scalar Type	RELATION	Relation Identifier
6	Function Revision	Vehicle Functional Model	090271		FunctionalityRevision		
7	Function Revision	Closures	090272		FunctionalityRevision	PSOccurrence_struct	10
8	Function Revision	Tailgate	090273		FunctionalityRevision	PSOccurrence_struct	10
9	Function Revision	Provide Easy Access to Rear of Vehicle	090274		FunctionalityRevision	PSOccurrence_struct	20
10							
11	Function Revision	Secure Access to Rear of Vehicle	090275		FunctionalityRevision	PSOccurrence_struct	30
		Maintain					

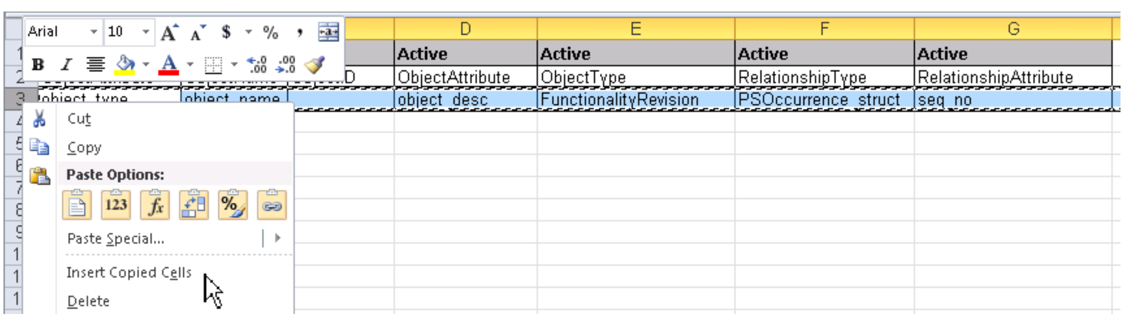
2. Enter the object's property values in the new row.

> Caution:
>
> The **Scalar Type** cell must contain the value for the base item type. The base type is required because Teamcenter generates the persistent item before adding the occurrence in the structure.

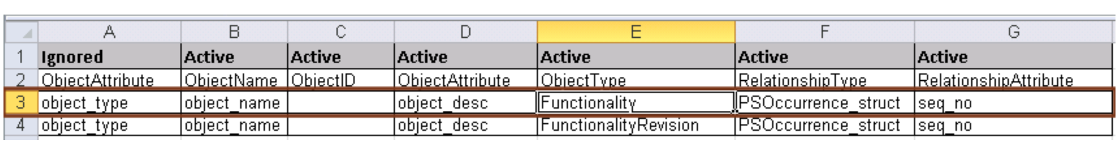


	A	B	C	D	E	F	G
1	Siemens PLM Software						
2	Teamcenter Excel Export						
3	"Live" edit on this spreadsheet requires Teamcenter Extensions for Microsoft Office						
4							
5	Type	Name	ID	Description	Scalar Type	RELATION	Relation Identifier
6	Function Revision	Vehicle Functional Model	090271		FunctionalityRevision		
7	Function Revision	Closures	090272		FunctionalityRevision	PSOccurrence_struct	10
8	Function Revision	Tailgate	090273		FunctionalityRevision	PSOccurrence_struct	10
9	Function Revision	Provide Easy Access to Rear of Vehicle	090274		FunctionalityRevision	PSOccurrence_struct	20
10	Function Revision	Provide Adequate Lighting	090297		Functionality	PSOccurrence_struct	20
11	Function Revision	Secure Access to Rear of Vehicle	090275		FunctionalityRevision	PSOccurrence_struct	30
		Maintain					

3. In the Excel control sheet, copy the row containing the keyword tag values, and insert it above the selection.



4. In the new row under the **ObjectType** keyword tag, enter the value for the base item type.



	A	B	C	D	E	F	G
1	Ignored	Active	Active	Active	Active	Active	Active
2	ObjectAttribute	ObjectName	ObjectID	ObjectAttribute	ObjectType	RelationshipType	RelationshipAttribute
3	object_type	object_name		object_desc	Functionality	PSOccurrence_struct	seq_no
4	object_type	object_name		object_desc	FunctionalityRevision	PSOccurrence_struct	seq_no

An object occurrence is added to the structure when the import process is complete. The underlying item and item revision are created in Teamcenter.

Create a property in the target structure

> Caution:
>
> Properties with dynamic and cascading lists of values (LOVs) cannot be modified in the target structure. If the Excel input file contains these LOV property types, the validation test generates an error message.

1. In the Excel data sheet, insert a column to the right of the right-most column.

2. Enter the property name in the new column's top cell.

3. In the cells below the top cell, enter the property values for the objects.

The values for existing properties are applied to each object in the structure when the import process is complete.

Modify object properties in the target structure

> Caution:
>
> Properties with dynamic and cascading lists of values (LOVs) cannot be modified in the target structure. If the Excel input file contains these LOV property types, the validation test generates an error message.

- In the Excel data sheet, enter or overwrite the desired cell values in the object’s property columns.

The new values are applied in Teamcenter when the import process is complete.

Remove an object from the target structure

- Delete the corresponding row in the Excel data sheet.

> Warning:
>
> - Do not delete the row for the only child of a given parent in both Teamcenter and Excel. Instead, add the **_remove** suffix in the cell for the child object identifier.
>
> - Do not add the **_remove** suffix for an object that has a sibling at the same level.

The object occurrence is removed from the structure when the import process is complete.

> Note:
>
> The underlying item and item revision remain in Teamcenter.

Remove a property from the target structure

- Delete the corresponding column in the Excel data sheet.

> Warning:
>
> Do not delete the **Object ID**, **Object Type**, or **Object Name** column. Teamcenter inserts these columns in the output file by default.
>
> If the data sheet does not contain all of the default columns, import processing stops and the entire transaction is rolled back. You can rename the default columns using any names you want.

The property is removed from each object in the structure when the import process is complete.

Working around Excel's eight-level limitation

Excel's outline hierarchy is limited to eight levels. When the selected Teamcenter hierarchy exceeds that limit, all objects are exported to an unstructured file. Excel's **Outline** features are disabled in this file.

Data cannot be imported if the **Outline** features are disabled on Excel's **Data** tab.

To work around this limitation, you can:

- Export the structure to a standard Excel file by selecting **Static Snapshot** in the **Export to Excel** dialog box.
- Edit the static output file to match the object and relationship hierarchy in the structure.
- Initiate the import process from the edited static file.

> Note:
>
> Associate the disabled output file’s control sheet with the edited static file.

Initiate the import process

1. With the data sheet active in the Excel import file, click the **Import to Teamcenter** button on the **Teamcenter** tab.

   Control sheet validation begins against the intermediate structure.

   > Tip:
   >
   > You can automatically fill in empty object identifiers by clicking the lower half of the button and clicking **Assign Teamcenter IDs**.

Note:

- Identifier cells for folders cannot be populated automatically.
- If the **Teamcenter Login** page is displayed, enter your Teamcenter user identifier and password, and then click **Login**.

2. Do one of the following:

If you see	Do this
A message stating that parsing is complete	• Click **OK**. Column mapping verification begins against the intermediate structure. The **Column Mappings** dialog box displays the current mapping between the data sheet and the control sheet. Review this summary to determine if the mapping is correct. • The process cannot continue if the dialog box does not display at least one second-level node below any top-level node. • The process can continue if control sheet columns map to data sheet columns other than the ones that you intend. To stop the process and correct the mapping, click **Correct Data**. You must re-initiate the process after making the corrections. To continue the process with the current mapping, click **Continue**. Error detection begins against the intermediate structure. • If the **Validation Errors** dialog box opens, Correct the data sheet errors, and then re-initiate the import process. • If the Excel Import wizard opens, follow the instructions on the wizard tabs until the **Step Four** tab states that the process is complete. Tip: To work with the imported structure in the Teamcenter rich client: a. Use the search feature to find the structure's top-level object.

If you see	Do this
	b. Select the top-level object and send it to the desired application.
The **Control File Validation** dialog box	a. Record the dialog box contents (for example, in a screen shot) for reference during corrections. b. Click **Cancel** to terminate the process. c. In the control sheet, correct the items listed in the dialog box. d. Re-initiate the import process.

Correct data sheet errors

Note:

The Excel Import wizard is displayed if no data sheet errors are detected.

When the data sheet contains errors, the **Validation Errors** dialog box is displayed.

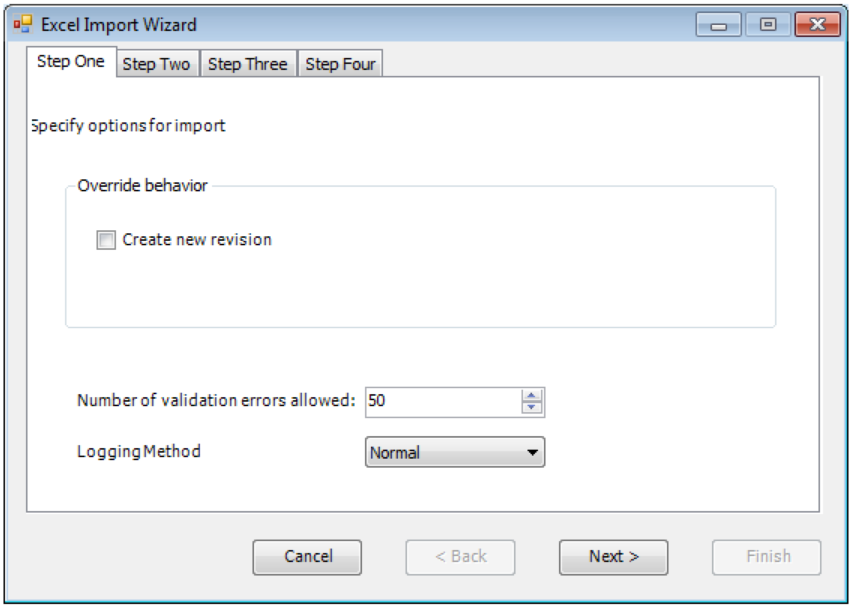
1. Record the dialog box contents (for example, in a screen shot) for reference during corrections.

2. Click **Cancel** to terminate the process.

3. Correct the items listed in the dialog box.

4. Re-initiate the import process.

Step One: Processing options



On the Excel Import wizard, the **Step One** tab contains the following processing options.

Option	Description
Create new revision	Specifies whether to create new revisions when structure objects are updated, added, or removed. • Select the check box to create new revisions. • Clear the check box to overwrite the latest revisions. Note: The **createNewRevision** custom preference determines the check box default state. • The check box is selected if the preference value is **true**.

Option	Description
	• The check box is cleared if the preference value is **false** or if the preference is not present on the Teamcenter server. If you have questions about preferences, consult your Teamcenter administrator.
Number of validation errors allowed	Sets the maximum number of rows for data error detection. The default value is **50**.
Logging Method	Sets the log file granularity for process diagnostics. • Select **Normal** for basic information about exceptions other than feedback from the server. • Select **Verbose** for basic exceptions and details of errors such as failures and performance bottlenecks. You can view the log file for general information and to research errors.

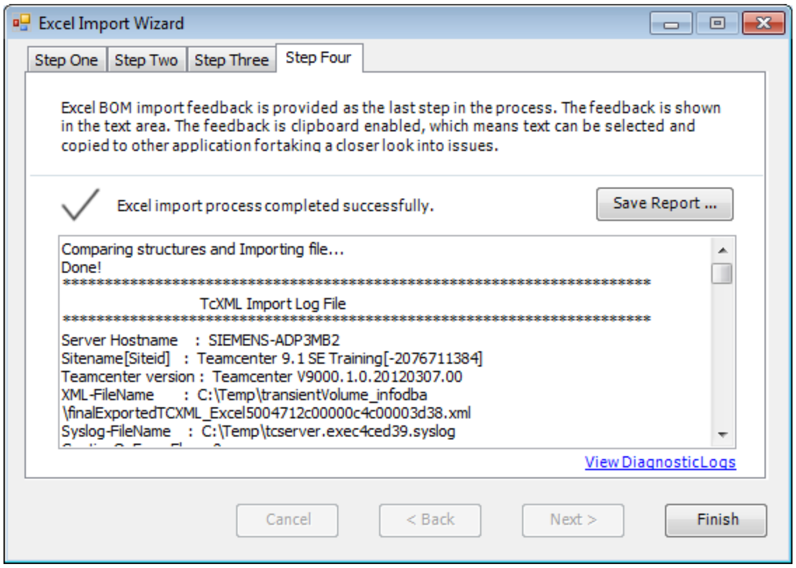
Step Four: Message handling

While the **Step 4** tab indicates progress, it can display any or all of these messages:

Message	Action
`Some objects being imported are currently checked out.`	• Click **Yes** to continue the process without overwriting the objects with data from the import file. • Click **No** to stop the process and check in objects. Caution: If you click **No**, you must re-initiate the process. In the import file, a list of the checked out objects and their reserving users is inserted on a separate sheet.
`Some objects being imported were modified in Teamcenter after this sheet was exported.`	• Click **Yes** to continue the process and overwrite the objects with data from the import file. • Click **No** to stop the process and identify the objects.

Message	Action
	Caution: If you click **No**, you must re-initiate the process. In the import file, the objects that were modified in Teamcenter are highlighted in red.
The text of some requirements was created in MS Word and may have rich content.	• Click **Yes** to continue the process without overwriting **Body Text** property values in Teamcenter. • Click **No** to stop the process and identify the requirements. Caution: If you click **No**, you must re-initiate the process. In the import file, the requirements with rich text content are highlighted in orange.

Step Four: Feedback and diagnostics



When the **Step 4** tab states that the import is complete, you can do the following:

- To write server feedback to a separate file, click **Save Report**.

  You can use the standard Windows functions to copy the feedback from the text pane to another application, for example, Microsoft Notepad.

- To open the process log file, click the **View Diagnostic Logs** link.

  The log file can contain basic information on exceptions and details on errors. Granularity is set by the **Logging Method** option on the **Step 1** tab.

5. Conducting content reviews using Client for Office

Overview of conducting content reviews

Content reviews are generally conducted by multiple individuals during a review cycle. Client for Office enables you to add and review markup comments in Microsoft Office Word documents during content reviews. Word documents are stored in Teamcenter and can be attached to items and used in workflows.

This functionality differs from adding markup comments to requirements objects using live Word as the interface to the content of the requirement objects.

Client for Office provides markup features for all stages of a Word document review cycle. On the **Teamcenter** tab of the Office ribbon, you click **Markup** to display the **Teamcenter Markup Manager** pane. Depending on your role in the review cycle, you can use the **Teamcenter Markup Manager** pane to perform review tasks such as:

- Add and delete comments.
- View comments.
- Modify comment text and comment types.
- Revise content according to reviewer comments.
- Apply a disposition comment and a disposition status to the comment.

Client for Office markup features work with Word's built-in markup features, which are available on the **Review** tab of the Office ribbon. The document displays comments according to your **Tracking** settings on the **Review** tab.

> Caution:
>
> If your Teamcenter username or ID is the same as the username or ID of the operating system of your computer, use the Teamcenter **Markup** panel to perform markups, instead of Microsoft Word comments to prevent possible corruption of data.

Multiple Teamcenter users can mark up the same document concurrently.

Caution:

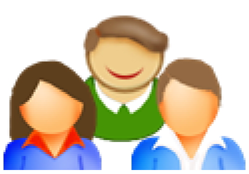
Siemens Digital Industries Software recommends against setting document protection and editing restrictions using the options in the **Protect** button group on the Word **Review** tab. Using these settings has the following impact on the operation of the **Load** button:

- Word hides existing comments and they cannot be removed with the **Load** button.
- Word's hidden comments cause comment sequence numbers to be reset so that they do not reflect the actual sequence in the document.
- The correct sequence numbers are restored when you close and reopen the document.

Stages and roles for conducting content reviews

Stages and roles in a review cycle

Each user who participates in a content review cycle has a role according to their responsibilities in the content review cycle. Each role is involved in different stages of the review cycle.

Role	Stage
 Author	Clear markup comments from a document (optional).
 Reviewer	Add and edit review comments.
 Author, reviewer, or reader	View the current markup comments in the review document.
 Author	Revise the content according to reviewer markup and apply a disposition status to the reviewer markup entries.

Role descriptions and permissions for a review cycle

Your role in the content review cycle determines the tasks you can perform and the functionality available to you when working with the **Teamcenter Markup Manager** pane. Your role is defined by:

- The Teamcenter access privileges defined by the administrator.

  Administrators use access control lists to set users' markup privileges on both document datasets and datasets that store markups.

- How you open the document.

Depending on your access privileges, you could assume different roles for the same document. For example, as a user with write privileges, you could perform author tasks or the reviewer tasks. In this case, your role depends on how you open the document.

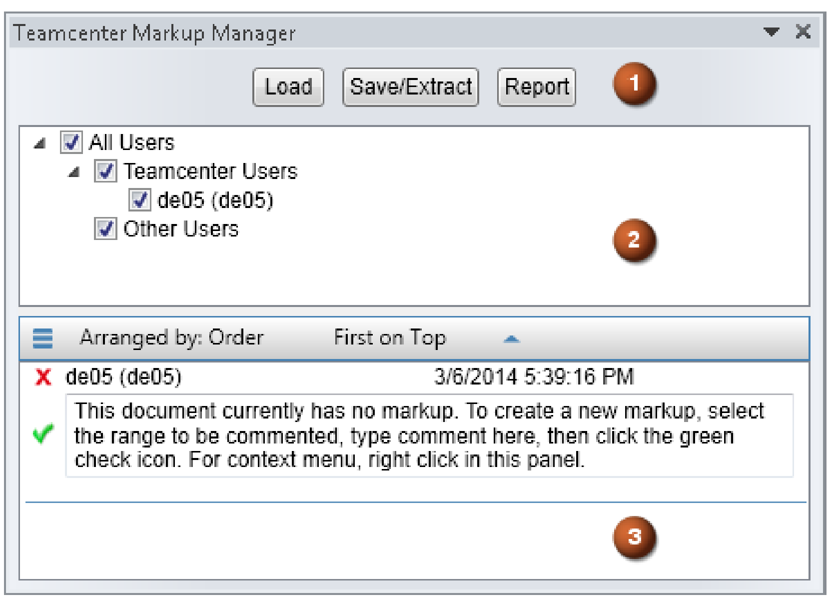
Role	Description	Access privileges	How open document	Functions available
 **Author** Creates and edits the document content and manages review comments.	In the review cycle, an *author*: • Can clear markup comments from a document. • Can add, modify, and remove review comments. • Can revise the document according to *reviewer* comments. • Can apply a disposition status to the reviewer markup entries.	• **Write** and **Markup** access for document datasets • **Write** access for markup datasets	**Open and Check-Out File**	**Load** and **Save/Extract**
 **Reviewer** Adds comments as a member of the review team.	In the review cycle, a *reviewer*: • Can add review comments and edit their own review comments. • Cannot modify comments owned by other users.	• **Read** and **Markup** access for document datasets • **Write** access for their own markup datasets	**Open File (Read Only)**	**Load** and **Save/Extract**

Role	Description	Access privileges	How open document	Functions available
	• Cannot edit document content.			
 **Reader** Reviews the document for informational purposes.	In the review cycle, a *reader*: • Can view the document contents and review comments. • Cannot add comments. • Cannot modify comments owned by other users. • Cannot edit document content.	• **Read** access for document datasets • **View** access for markup datasets	**Open File (Read Only)**	**Load**

Working in the Teamcenter Markup Manager pane

Teamcenter Markup Manager pane

From the **Teamcenter** tab, you use the **Markup** button to display the **Teamcenter Markup Manager** pane. Use this pane to perform tasks for a document in a review cycle.



1	Pane buttons	Use the **Load**, **Save/Extract**, and **Report** buttons to perform Teamcenter markup actions.
2	Upper pane	Contains a hierarchical tree of user categories and names, referred to as the *comment owners tree*. Below the root node, the secondary nodes represent categories of users who own comments in the document. Use the comment owners tree to identify the reviewers and their comments as well as select which comments to show or hide.
3	Lower pane	Displays review comments as items in a list, referred to as the *comment details list*. This list resembles the message layout in your Outlook **Inbox**. Use the comment details list to manage review comments including add, modify, view, and delete review comments.

Using the markup buttons

Use the buttons at the top of the **Teamcenter Markup Manager** pane to perform markup actions on the open Word document and its associated Teamcenter markups.

Button	Action
Load	Removes any comments not yet saved and inserts comments from all Teamcenter markups that are currently associated with the document. Caution: Siemens Digital Industries Software recommends against setting document protection and editing restrictions using the options in the **Protect** button group on the Word **Review** tab. Using these settings has the following impact on the operation of the **Load** button: • Word hides existing comments and they cannot be removed with the **Load** button. • Word's hidden comments cause comment sequence numbers to be reset so that they do not reflect the actual sequence in the document. • The correct sequence numbers are restored when the user closes and reopens the document.
Save/Extract	Depends on the role that the user assumes.

Button	Action
	• For an *author* (who opens and checks out the file), clears new and modified comments from the window and saves them as a markup object in Teamcenter. • For a *reviewer* (who opens the file as read-only), saves new and modified comments as a markup object in Teamcenter. Note: The **Save/Extract** button is unavailable for a *reader*.
Report	Generate an XML list of the current markups and disposition status, and open them in Microsoft Excel.

Note:

- Teamcenter markup objects are automatically associated with the document and the users who own the comments.
- Markup objects cannot be displayed by expanding the source datasets in the Client for Office **Folder View**.

  Use the Teamcenter rich client to display markup objects.

Identify reviewers and their comments

In the **Teamcenter Markup Manager** pane, the upper pane contains a hierarchical tree that consists of the following:

- The root node, named **All Users**
- A secondary node named **Teamcenter Users**

  At the next lower level, a node is shown for each Teamcenter user who added markup comments using **Teamcenter Markup Manager**.

> Note:
>
> The user's Teamcenter identifier is shown in parentheses (**( )**) to the right of the name.

- A secondary node named **Other Users**

  At the next lower level, a node is shown for each external user who owns comments that were inserted through the standard Word markup features.

  > Note:
  >
  > The user's initials are shown in brackets (**[ ]**) to the right of the name.

You can expand and collapse the nodes and use the checkboxes to hide and show comments in the lower pane and in the review document.

Show or hide reviewer comments

- In the upper pane of the **Teamcenter Markup Manager**, in the hierarchical user tree, do one or both of the following:

  - Clear the check box for each user whose comments you want to hide.

    > Tip:
    >
    > You can clear the check box for the root node or a secondary node to clear all lower level check boxes simultaneously.

    The comments are hidden in the details list and in the document.

  - Select the check box for each user whose comments you want to show.

    > Tip:
    >
    > You can select the check box for the root node or a secondary node to select all lower level check boxes simultaneously.

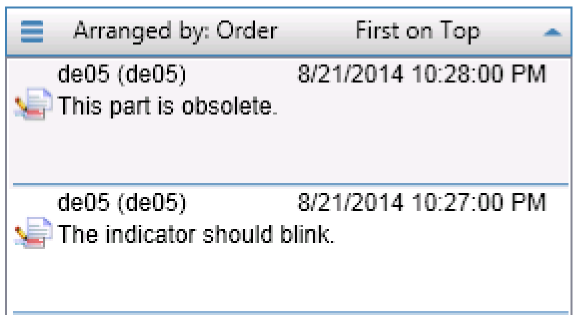
    The comments are displayed in the lower pane of the **Teamcenter Markup Manager**, and in the review document.

  > Note:
  >
  > A solidly filled check box indicates a mixture of selected and cleared check boxes below that node.

Manage review comments in the comment details list

In the **Teamcenter Markup Manager** pane, the lower pane displays review comments as line items in a list and is referred to as the *comment details list*. Each item in the list contains markup details for one comment:

- A graphic symbol that indicates the comment type
- The owning user's name and user identifier
- The comment text
- The date and time of the most recent user action



You can arrange comments in the list and navigate from the list to comments in the document.

Use the comment details list to perform many of the tasks in the review cycle including:

- **Add review comments**
- **Modify review comments**
- **Modify comment types**
- **View comments**
- **Delete comments**

Comment types and symbols

The comment details list displays graphic symbols that indicate comment types. The symbol for each comment appears in the leftmost position in the line.

Symbol	Description
	Indicates **General** comments in documents where you have **Read/Write** access. **General** comments are used informally, for example, one user's questions on selected content and another user's answers. Note: You can delete **General** comments before the document's release.
	Indicates **General** comments in documents where you have **Read-only** access. Note: You cannot modify or delete **General** comments with this symbol.
	Indicates **Hidden** comments that are visible only to you as the comment owner.

Arranging comments in the details list

Buttons at the top of the comment details list control the comment text line display and the comment sorting sequence.

Button	Description
Show comment in single/multiple lines	Switches the text line display between: • All text lines of each comment. • Only the first text line of each comment. The single-line display saves space when the details list contains a large number of comments. Note: The line length depends on the width of the **Teamcenter Markup Manager** pane.
Arranged by	Displays a menu from which you can choose the sort key.

When you choose a sort key from the **Arranged by** menu, the details list immediately sorts the comments. Your sort key choice appears in the button label.

Arranged by menu sort key	Description
Order	Sorts by the comment sequence numbers that Word generates in the document. The button to the right determines which comment moves to the top of the list. **First on Top** — The top comment is the one with the first sequence number in the document. **Last on Top** — The top comment is the one with the last sequence number in the document.
Name	Sorts in alphabetical order of the owning user names. The button to the right determines which comment moves to the top of the list. **A on Top** — The top comment is the one whose owning user name is first in alphabetical order. **Z on Top** — The top comment is the one whose owning user name is last in alphabetical order.
User ID	Sorts in alphabetical order of the owning user identifiers. The button to the right determines which comment moves to the top of the list. **A on Top** — The top comment is the one whose owning user identifier is first in alphabetical order. **Z on Top** — The top comment is the one whose owning user identifier is last in alphabetical order.
Date	Sorts by the modification date and timestamps. The button to the right determines which comment moves to the top of the list. **Latest on Top** — The top comment is the one whose date and timestamp is the most recent. **Oldest on Top** — The top comment is the one whose date and timestamp is the earliest.
Comment	Sorts in alphabetical order of comment text. The button to the right determines which comment moves to the top of the list.

Arranged by menu sort key	Description	
	A on Top	The top comment is the one whose text is first in alphabetical order.
	Z on Top	The top comment is the one whose text is last in alphabetical order.
Type	Sorts by the **General** and **Hidden** comment types. The button to the right determines which comment moves to the top of the list.	
	Hidden on Bottom	The top comment is the **General** comment with the most recent date and timestamp. After the last **General** comment in the sequence, the first **Hidden** comment is the one with the most recent date and timestamp.
	Hidden on Top	The top comment is the **Hidden** comment with the most recent date and timestamp. After the last **Hidden** comment in the sequence, the first **General** comment is the one with the most recent date and timestamp.

Navigating to comments in the document

When you select a markup item in the comment details list, Client for Office locates the corresponding comment in the document.

For example:

- To find the most recent comment, you can choose **Arranged by→Date**, click **Latest on Top**, and then click the first item.

  The comment and content selection are highlighted in the document, with the cursor at the end of the last paragraph in the comment text.

> Note:
>
> The document displays **Teamcenter Markup Manager** comments according to your **Tracking** settings on the Word **Review** tab.

Capture legacy Microsoft Word comments as Teamcenter markup

If a Microsoft Word file has comments that are not saved as Teamcenter markups, you can save the comments as Teamcenter markups. Note, however, that comments saved as Teamcenter markups are saved as plain text. Any formatting or font changes are lost.

> Note:
>
> Siemens Digital Industries Software recommends using the Teamcenter Markup Manager to manage comments.

1. In Teamcenter, create a Word dataset with the Word file that contains the comments.

2. Open Microsoft Office Word.

3. On the **Teamcenter** tab of the ribbon, click **Open** .

   The **Teamcenter Login** dialog box appears.

4. Log on to Teamcenter.

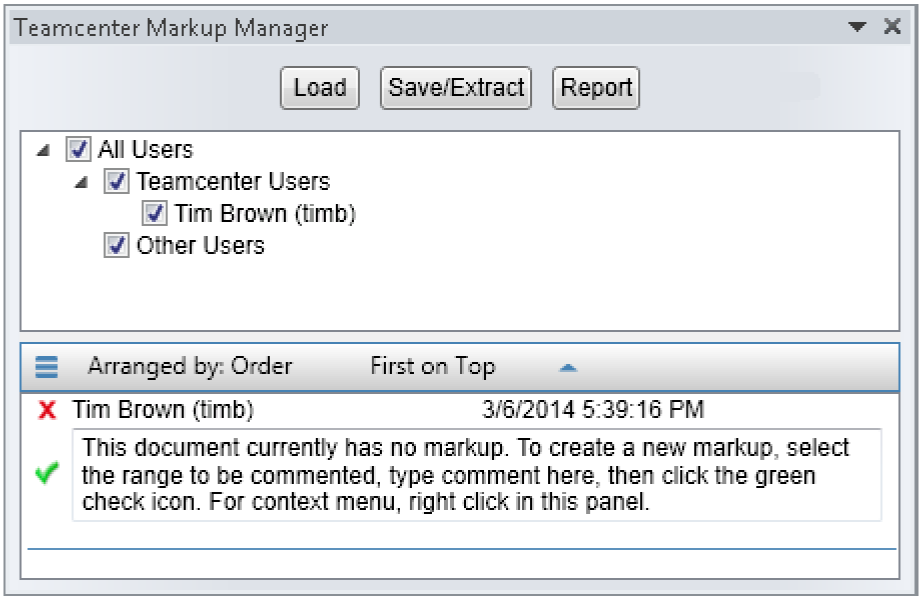
5. In the **Teamcenter Open** dialog box:

   a. Use tree in the **Home** pane to navigate to and select the document.

   b. Click the down arrow on the **Open** button and choose **Open and Check-Out File** from the list.

6. On the **Teamcenter** tab of the Office ribbon, click **Markup** to display the **Teamcenter Markup Manager** pane.

   The comment details list shows no markup comments.



7. Click **Save/Extract** at the top of the **Teamcenter Markup Manager** pane.

   The system extracts all the legacy Word comments and saves them as Teamcenter markups.

8. Click **Save** to save any changes you made to the document.

9. When a message appears asking you if you want to check in the document to Teamcenter, click **Yes**.

10. Close the document.

11. To see the legacy comments in the document:

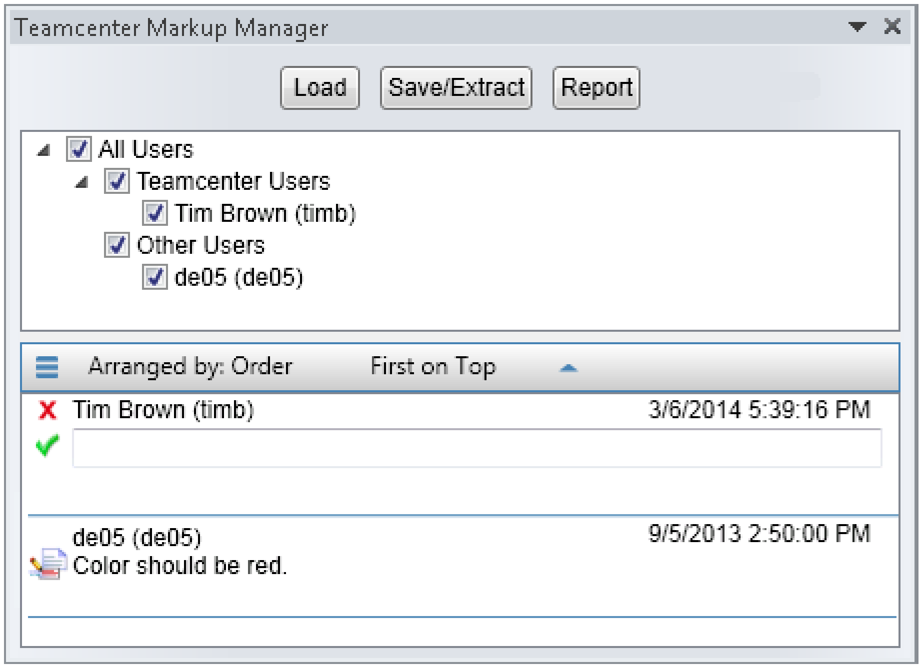
    a. On the **Teamcenter** tab of the ribbon, click **Open** to display the **Teamcenter Open** dialog box.

    b. Use the tree in the **Home** pane to navigate to and select the document.

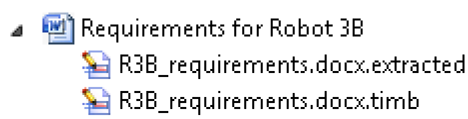
    c. Click the down arrow on the **Open** button and choose **Open Read-Only** from the list.

    d. On the **Teamcenter** tab of the Office ribbon, click **Markup** to display the **Teamcenter Markup Manager** pane.

    The legacy Word comments appear, and the user is listed under **Other Users**.



In Teamcenter, any native Word markups you extract appear with the **extracted** suffix on the name of the markup. Markups by Teamcenter users appear with their user names as the suffix.



Perform the tasks in a review cycle

Open Client for Office for content reviews

Client for Office is the connection between Teamcenter and Microsoft Office Word that enables you to add and review markup comments in documents during content reviews.

The content review tasks that you can perform depend on your role in the review cycle.

1. Open Microsoft Office Word.

2. Choose the option from the Teamcenter tab of the Office ribbon for the action you want to take, such as **Open**.

   The **Teamcenter Login** dialog box appears.

3. Log on to Teamcenter.

   Client for Office is available for you to use for performing content review tasks in the review cycle.

Clear markup comments from a document

As an author, that is, a user with write access who opens and checks out a document, you can clear markup comments from a document. This is useful for sending the document through a review cycle without showing any existing markup comments, for example, through email to non-Teamcenter users. This does not remove the markup comments from the Teamcenter database. This is an optional step in the review cycle.

1. In Client for Office, open the document in the *author* role by doing one of the following:

   - In the **Folder View** or the **Navigation** view, right-click the document and choose **Open and Check-Out File**.

   - On the **Teamcenter** tab of the ribbon, click **Open** to display the **Teamcenter Open** dialog box.

     a. Use tree in the **Home** pane to navigate to and select the document.

     b. Click the down arrow on the **Open** button and choose **Open and Check-Out File** from the list.

2. On the **Teamcenter** tab of the Office ribbon, click **Markup** to display the **Teamcenter Markup Manager** pane.

3. Click **Save/Extract** at the top of the **Teamcenter Markup Manager** pane.

   The comments are cleared from the document.

4. Click **Save** to save any changes you made to the document.

5. When a message appears asking you if you want to check in the document to Teamcenter, click **Yes**.

6. Close the document.

Working with review comments

Add a comment

To add comments to a document during the review cycle, both authors and reviewers open the document in the *reviewer* role. This is recommended, because in the *reviewer* role, you can use the **Load** button to load any other reviewers' comments that were added since you opened the document. If you open the document in the *author* role, the **Load** button clears all comments from the document and other reviewers cannot see them.

If you use the **Load** button, you should use **Save/Extract** before closing the document, because content may have changed causing the location of the markups to change.

Readers cannot add comments.

1. In Client for Office, open the document in the *reviewer* role by doing one of the following:

    - In the **Folder View** or the **Navigation** view, right-click the document and choose **Open File (Read-Only)**.

    - On the **Teamcenter** tab of the ribbon, click **Open** to display the **Teamcenter Open** dialog box.

        a. Use the tree in the **Home** pane to navigate to and select the document.

        b. Click the down arrow on the **Open** button and choose **Open Read-Only** from the list.

2. On the **Teamcenter** tab of the Office ribbon, click **Markup** to display the **Teamcenter Markup Manager** pane.

3. In the document, select the text or graphic to associate with the comment.

4. Right-click anywhere in the details list, and then choose **Create new markup**.

    A blank text box appears for you to enter the comment.

5. Click in the text box and enter the comment text.

    You can enter multiple lines of text by pressing Enter to start each new line.

6. To add the comment to the document, click next to the text box.

    To cancel the new comment, click next to the text box.

    When you add the new comment, it is added to the details list with the default comment type, **General**, and the related symbol appears at the left.

7. Click **Save/Extract** in the **Teamcenter Markup Manager** pane.

    The markup comments are saved to Teamcenter.

    > Note:
    >
    > Although the markups are displayed in the document, the Teamcenter Markup Manager pane does not show the markups immediately after you click **Save/Extract**. To see these markups in the Teamcenter Markup Manager pane, close the document, reopen it, and click the **Markups** button in the **Teamcenter** tab of the Office ribbon.

Note:

If multiple users are marking up the same document concurrently and an error message appears indicating the base dataset is checked out by another user or is out of date, contact your administrator to review the **ITEM_relation_types_update_lmd** preference.

8. Close the document.

9. If a message appears asking you if you want to save changes to the document, do one of the following:

   - To save a copy of the document to your local drive for your personal use, click **Yes**, and choose the location where you want to save it.

     Since the document is opened as read-only, you cannot save the document to Teamcenter.

   - To close the document without saving a personal copy, click **No**.

View comments

Markup comments can be viewed by readers, reviewers, and authors.

1. In Client for Office, open the document by doing one of the following:

   - In the **Folder View** or the **Navigation** view, right-click the document and choose **Open File (Read-Only)**.

   - On the **Teamcenter** tab of the ribbon, click **Open** to display the **Teamcenter Open** dialog box.

     a. Use the tree in the **Home** pane to navigate to and select the document.

     b. Click the down arrow on the **Open** button and choose **Open Read-Only** from the list.

2. On the **Teamcenter** tab of the Office ribbon, click **Markup** to display the markup comments and the **Teamcenter Markup Manager** pane.

3. (Optional) Arrange comments in the details list.

4. In the comment details list, select the markup you want to review.

   The selected markup is highlighted in the Word document.

> Note:
>
> Word displays **Teamcenter Markup Manager** comments according to your **Tracking** settings on the **Review** tab.

5. If other users may have added comments to the document since you opened it, click **Load** at the top of the **Teamcenter Markup Manager** pane to see the new comments.

6. When you are done viewing the comments, close the document.

   If a message appears asking you if you want to save changes to Teamcenter, click **No**.

Modify comment text

Users in both the *author* and *reviewer* roles can modify their own comments; however, only users in the *author* role can modify other users' comments.

> Note:
>
> Modifications made using Word's built-in reviewing features are not saved in Teamcenter.

1. In Client for Office, open the document in either the *reviewer* role or the *author* role:

   To open in the *reviewer* role, do one of the following:

   - In the **Folder View** or the **Navigation** view, right-click the document and choose **Open File (Read-Only)**.

   - On the **Teamcenter** tab of the ribbon, click **Open** to display the **Teamcenter Open** dialog box.

     a. Use the tree in the **Home** pane to navigate to and select the document.

     b. Click the down arrow on the **Open** button and choose **Open Read-Only** from the list.

   To open in the *author* role, do one of the following:

   - In the **Folder View** or the **Navigation** view, right-click the document and choose **Open and Check-Out File**.

   - On the **Teamcenter** tab of the ribbon, click **Open** to display the **Teamcenter Open** dialog box.

     a. Use tree in the **Home** pane to navigate to and select the document.

     b. Click the down arrow on the **Open** button and choose **Open and Check-Out File** from the list.

2. On the **Teamcenter** tab of the Office ribbon, click **Markup** to display the **Teamcenter Markup Manager** pane.

3. In the details list, select the comment whose text you want to modify.

   You can select two or more comments with **Read/Write** access, using the standard Windows functions for multiple selection.

4. Right-click the selection and choose **Modify selected markups**.

   > Note:
   >
   > This option is unavailable if the selection contains **General** comments whose symbols indicate **Read-only** access ().

5. In the text box for the comment, modify the text as necessary.

   You can enter multiple lines of text by pressing Enter to start each new line.

6. Do the following for each comment with an open text box:

   a. Place the cursor in the text box and enter the comment text.

      You can enter multiple lines of text by pressing Enter to start each new line.

   b. To commit your changes, next to the text box.

      To cancel your changes, click next to the text box.

      The text box closes and the modified comment is displayed in the details list; or, if you cancelled your changes, the original text is displayed.

7. Click **Save/Extract** in the **Teamcenter Markup Manager** pane.

   The markup comments are saved to Teamcenter.

8. Close the document.

9. If a message appears asking you if you want to save changes to the document, do one of the following:

   - (Reviewer role) To save a copy of the document to your local drive for your personal use, click **Yes**, and choose the location where you want to save it. Since the document is opened as read-only, you cannot save the document to Teamcenter.

(Author role) To save to Teamcenter any changes you made to the document content, click **Yes**, and in the **Confirm Check-In** dialog box, click **Yes**.

- To close the document without saving, click **No**.

Make comments visible or hidden for other users

Users in both the *author* and *reviewer* roles can make their comments visible or hidden to other users; however, only users in the *author* role can change how other users' comments appear.

1. In Client for Office, open the document in either the *reviewer* role or the *author* role:

   To open in the *reviewer* role, do one of the following:

   - In the **Folder View** or the **Navigation** view, right-click the document and choose **Open File (Read-Only)**.

   - On the **Teamcenter** tab of the ribbon, click **Open** to display the **Teamcenter Open** dialog box.

     a. Use the tree in the **Home** pane to navigate to and select the document.

     b. Click the down arrow on the **Open** button and choose **Open Read-Only** from the list.

   To open in the *author* role, do one of the following:

   - In the **Folder View** or the **Navigation** view, right-click the document and choose **Open and Check-Out File**.

   - On the **Teamcenter** tab of the ribbon, click **Open** to display the **Teamcenter Open** dialog box.

     a. Use tree in the **Home** pane to navigate to and select the document.

     b. Click the down arrow on the **Open** button and choose **Open and Check-Out File** from the list.

2. On the **Teamcenter** tab of the Office ribbon, click **Markup** to display the **Teamcenter Markup Manager** pane.

3. In the details list, select the comment you want to make visible or hidden to other users.

   You can select two or more comments using the standard Windows functions for multiple selection.

4. Right-click the selection and choose one of the following:

   - **Set selected markups as Hidden**

The markups are visible only to you as the comment owner.

This option is unavailable when the entire selection consists of comments whose current type is **Hidden**.

- **Set selected markups as General**

  The markups are visible to all users.

  This option is unavailable when the entire selection consists of comments whose current type is **General**.

  Note:

  If you select more than one comment, and some comments have **Read-only** access, only the comments with **Read/Write** access are modified.

The details list displays the symbols for the new types.

Note:

If the sort key is **Arranged by→Type**, the details list re-sorts the comments within the new type.

5. Click **Save/Extract** in the **Teamcenter Markup Manager** pane.

   The changes to the markup comments are saved to Teamcenter.

6. (Author role) Since the **Save/Extract** feature clears the markup comments from the document, if you want other users to see the markup comments, click **Load** to show the comments in the document.

7. Close the document.

8. If a message appears asking you if you want to save changes to the document, do one of the following:

   - (Reviewer role) To save a copy of the document to your local drive for your personal use, click **Yes**, and choose the location where you want to save it. Since the document is opened as read-only, you cannot save the document to Teamcenter.

     (Author role) To save to Teamcenter any changes you made to the document content, click **Yes**, and in the **Confirm Check-In** dialog box, click **Yes**.

   - To close the document without saving, click **No**.

Delete comments

Users in both the *author* and *reviewer* roles can delete their comments; however, only users in the *author* role can delete other users' comments.

1. In Client for Office, open the document in either the *reviewer* role or the *author* role:

   To open in the *reviewer* role, do one of the following:

   - In the **Folder View** or the **Navigation** view, right-click the document and choose **Open File (Read-Only)**.
   - On the **Teamcenter** tab of the ribbon, click **Open** to display the **Teamcenter Open** dialog box.

     a. Use the tree in the **Home** pane to navigate to and select the document.

     b. Click the down arrow on the **Open** button and choose **Open Read-Only** from the list.

   To open in the *author* role, do one of the following:

   - In the **Folder View** or the **Navigation** view, right-click the document and choose **Open and Check-Out File**.
   - On the **Teamcenter** tab of the ribbon, click **Open** to display the **Teamcenter Open** dialog box.

     a. Use tree in the **Home** pane to navigate to and select the document.

     b. Click the down arrow on the **Open** button and choose **Open and Check-Out File** from the list.

2. On the **Teamcenter** tab of the Office ribbon, click **Markup** to display the **Teamcenter Markup Manager** pane.

3. In the details list, select the comment you want to delete.

   You can select two or more comments using the standard Windows functions for multiple selection.

4. Right-click the selection and choose **Delete selected markups**.

   The comments are deleted from the details list and from the document. If you select more than one comment, and some comments have **Read-only** access, only the comments with **Read/Write** access are deleted.

5. Click **Save/Extract** in the **Teamcenter Markup Manager** pane.

The new list of markup comments is saved to Teamcenter.

6. (Author role) Since the **Save/Extract** feature clears the markup comments from the document, if you want other users to see the markup comments, click **Load** to show the comments in the document.

7. Close the document.

8. If a message appears asking you if you want to save changes to the document, do one of the following:

   - (Reviewer role) To save a copy of the document to your local drive for your personal use, click **Yes**, and choose the location where you want to save it. Since the document is opened as read-only, you cannot save the document to Teamcenter.

     (Author role) To save to Teamcenter any changes you made to the document content, click **Yes**, and in the **Confirm Check-In** dialog box, click **Yes**.

   - To close the document without saving, click **No**.

Revise a document according to reviewer comments

During or at the end of a review cycle, an *author* uses comments from the *reviewers* as a guide in revising the document.

For example, the comments may call for any or all of the following revisions:

- Edit the document content.

- Delete comments for which revisions are complete.

- Add or modify comments for release with the document.

1. In Client for Office, open the document in the *author* role by doing one of the following:

   - In the **Folder View** or the **Navigation** view, right-click the document and choose **Open and Check-Out File**.

   - On the **Teamcenter** tab of the ribbon, click **Open** to display the **Teamcenter Open** dialog box.

     a. Use tree in the **Home** pane to navigate to and select the document.

     b. Click the down arrow on the **Open** button and choose **Open and Check-Out File** from the list.

2. On the **Teamcenter** tab of the Office ribbon, click **Markup** to display the **Teamcenter Markup Manager** pane.

3. If other users may have added comments to the document since you opened it, click **Load** at the top of the **Teamcenter Markup Manager** pane to see the new comments.

4. Revise the document as necessary, including any or all of the following tasks:

   - Edit the document content using standard Word features.
   - **Add comments to the document**.
   - **Modify comment text**.
   - **Make comments visible or hidden for other users**.
   - **Apply disposition comments and status to markup comments**.

5. Click **Save/Extract** at the top of the **Teamcenter Markup Manager** pane.

   The changes you made to markup comments are saved to Teamcenter, and the comments are cleared from the document, which hides them from other users who open the document as a reviewer or reader.

6. Click **Save** to save any changes you made to the document.

7. When a message appears asking you if you want to check in the document to Teamcenter, click **Yes**.

8. Close the document.

Applying disposition comments and status to markups

Process for applying dispositions to markup comments

Client for Office enables you to add and review markup comments in Microsoft Office Word documents during content reviews. Word documents are stored in Teamcenter and can be attached to items and used in workflows.

Dispositions provide a way to track the status of and comment on reviewers' markup comments. For example, you can add a disposition to a comment with status of **Rejected** and add a disposition comment such as, *Out of the scope of this project*.

Users in the *author* role can add and update disposition comments and apply a disposition status on review comment markups in the **Teamcenter Markup Manager** pane, comments details list. You can also generate a report of the disposition comments and status.

Note:

This content review functionality differs from adding markup comments to requirements objects using live Word as the interface to the content of the requirement objects, for which dispositions are not available.

Your business process may vary, but a typical process for adding and updating disposition comments and applying disposition status to markups includes the following steps:

1. Check out the review document.
2. Update the document's content for the related reviewer's markup.
3. Add a disposition comment on the related reviewer's markup and include a status.
4. Generate a report of the markups and the disposition of each.
5. Save and extract the markups and dispositions.
6. Check in the document.

Work with dispositions for markup comments

Open a document to work with dispositions

1. In Client for Office, do one of the following to open the document in the *author* role:
   - In the **Folder View** or the **Navigation** view, right-click the document and choose **Open and Check-Out File**.
   - On the **Teamcenter** tab of the ribbon, click **Open** to display the **Teamcenter Open** dialog box.
     a. Use tree in the **Home** pane to navigate to and select the document.
     b. Click the down arrow on the **Open** button and choose **Open and Check-Out File** from the list.
2. On the **Teamcenter** tab of the Office ribbon, click **Markup** to display the **Teamcenter Markup Manager** pane.

Create a disposition comment

1. In the comment details list, right-click a markup comment, and choose **Disposition on a selected markup**.

2. In the box, enter a comment.

3. Click next to the box.

   The disposition is added to the markup comment, and the disposition status is set to **None**.

Set or change the status of a disposition

1. In the comment details list, right-click the markup comment with the disposition, and choose **Update disposition status**.

2. Select one of the statuses from the list:

   - **None**
   - **Accepted**
   - **Cancelled**
   - **Completed**
   - **Opened**
   - **Rejected**

3. Click next to the box.

   The disposition status is added to the markup comment.

Update a disposition comment

1. In the comment details list, right-click the markup comment with the disposition, and choose **Disposition on a selected markup**.

2. In the box, update the comment.

3. Click next to the box.

   The disposition is updated.

Delete a disposition comment

1. In the comment details list, right-click the markup comment with the disposition, and choose **Disposition on a selected markup**.

2. In the box, clear the comment.

3. Click next to the box.

   The disposition is removed from the markup comment.

Save and check in a document with dispositions

1. Click **Save/Extract** in the **Teamcenter Markup Manager** pane.

   The dispositions and any updated markup comments are saved to Teamcenter. The dispositions and markup comments are also cleared from the document.

2. Close the document.

3. If a message appears asking you if you want to save changes to the document, do one of the following:

   - To save to Teamcenter any changes you made to the document content, click **Yes**, and in the **Confirm Check-In** dialog box, click **Yes**.

   - To close the document without saving, click **No**.

6. View and markup PDF files from Microsoft Outlook

Prerequisites for viewing and marking up PDF files

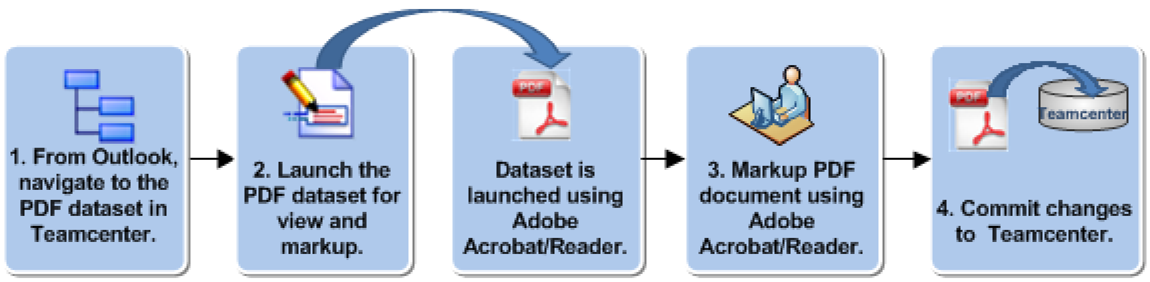
From Microsoft Outlook, you can view and markup a PDF file stored in Teamcenter without leaving the Outlook application. You use the view and markup capability provided by the Adobe Acrobat/Reader application to markup the PDF document. Markups are useful for making comments that you do not want to appear in the published PDF file.

You must install the **Acrobat/Reader Plugin** feature to view and markup, and sign PDF files.

The **Outlook_ViewMarkup_Launchable_TcTypes** preference defines the Teamcenter types that can launch for view and markup from Microsoft Outlook.

Process for viewing and marking up PDF files

Viewing and marking up a PDF file from Microsoft Outlook is part of a multi-step process:



1. **From Outlook, navigate to the PDF file in Teamcenter.**

   From the Teamcenter ribbon in Outlook, browse and locate the PDF file that you want to view and markup.

2. **Launch the PDF file for view and markup.**

   Right-click the PDF file in the search results and choose **View/Markup**. The PDF file is automatically launched using Adobe Acrobat/Reader.

3. **Markup PDF document using Adobe Acrobat Reader.**

4. **Commit changes to Teamcenter.**

   From Abobe Acrobat Reader, save the PDF document to commit the markup changes to Teamcenter.

View and markup a PDF file

1. From the Office application in Microsoft Outlook, navigate to and select the PDF file you want to view and markup.

2. Right-click and choose **View/Markup**.

   The PDF document is launched from Microsoft Outlook using the Adobe Acrobat/Reader application.

3. Using the Adobe Acrobat/Reader application, mark up the PDF document as desired.

4. From the Adobe Acrobat/Reader application, choose **File→Save**.

   The marked up changes are committed to Teamcenter.

7. Digitally sign PDF files from Microsoft Outlook

Prerequisites for digitally signing PDF files

From Microsoft Outlook, you can digitally sign a PDF file stored in Teamcenter without leaving the Outlook application. Digital signatures uniquely identify the person signing the PDF document. Using digital signing, reviewers can sign an electronic version of your document, instead of a printed one. For example, you can have reviewers digitally sign your PDF documents to approve them.

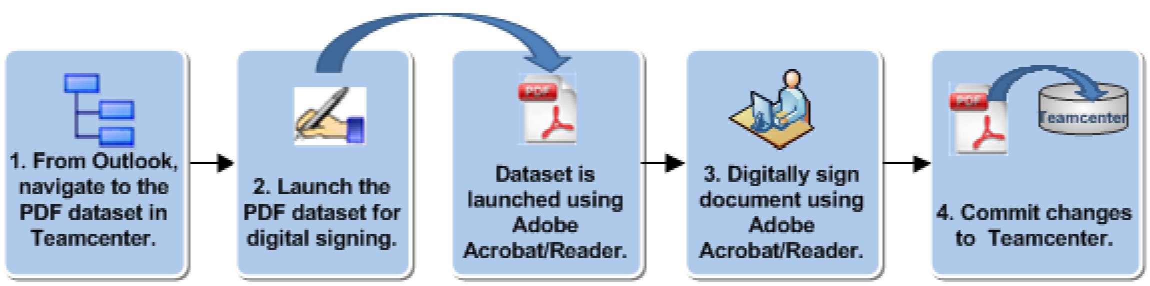
You must install the **Acrobat/Reader Plugin** feature to view and markup, and sign PDF files.

The **Outlook_Sign_Launchable_TcTypes** preference defines the Teamcenter object types you can launch for digitally signing from Microsoft Outlook.

Process for digitally signing PDF files

From Microsoft Outlook, you can digitally sign a PDF file stored in Teamcenter without leaving Outlook.

Digitally signing a PDF file is part of a multi-step process:



1. From Outlook, navigate to the PDF file in Teamcenter.

   From the Teamcenter ribbon in Outlook, browse and locate the PDF file that you want to digitally sign.

2. Launch the PDF file for digitally signing.

   Right-click the PDF file in the search results and choose **Sign**.

   The following occurs:

   - The PDF file is automatically launched using Adobe Acrobat/Reader.

- The PDF file is checked out in Teamcenter for signing.

  After you have checked out the PDF file for signing, you have the option of canceling the signature, which cancels the checkout.

  You cannot check out, check in, or cancel the checkout of the PDF file when it is checked out for sign.

3. Digitally sign the PDF document using Adobe Acrobat Reader.

4. Commit changes to Teamcenter.

   From Abobe Acrobat Reader, save the PDF document to commit the signature to Teamcenter.

   The following occurs after you commit the changes to Teamcenter:

   - The users' digital signature is stored in the PDF document.

   - As the following figure shows, the **Signed By** relation is created between the PDF document and the signing user to record the person who digitally signed the PDF file and the date and time when it was signed.

Digitally sign a PDF file

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 PDF document is launched from Microsoft Outlook using the Adobe Acrobat/Reader application and the PDF file is checked out in Teamcenter.

3. Using the Adobe Acrobat/Reader application, digitally sign the PDF document.

4. From the Adobe Acrobat/Reader application, choose **File→Save**.

   The signed document is checked in and the changes are committed to Teamcenter.

Cancel the signature on a PDF file

1. From the Office application in Microsoft Outlook, navigate to and select the signed PDF file for which you want to cancel the signature.

2. Right-click and choose **Cancel signing**.

   The PDF file is no longer checked out for signing.

View the digital signature history of a PDF file

1. From the Office application in Microsoft Outlook, navigate to and select the PDF file for which you want to view the digital signature history.

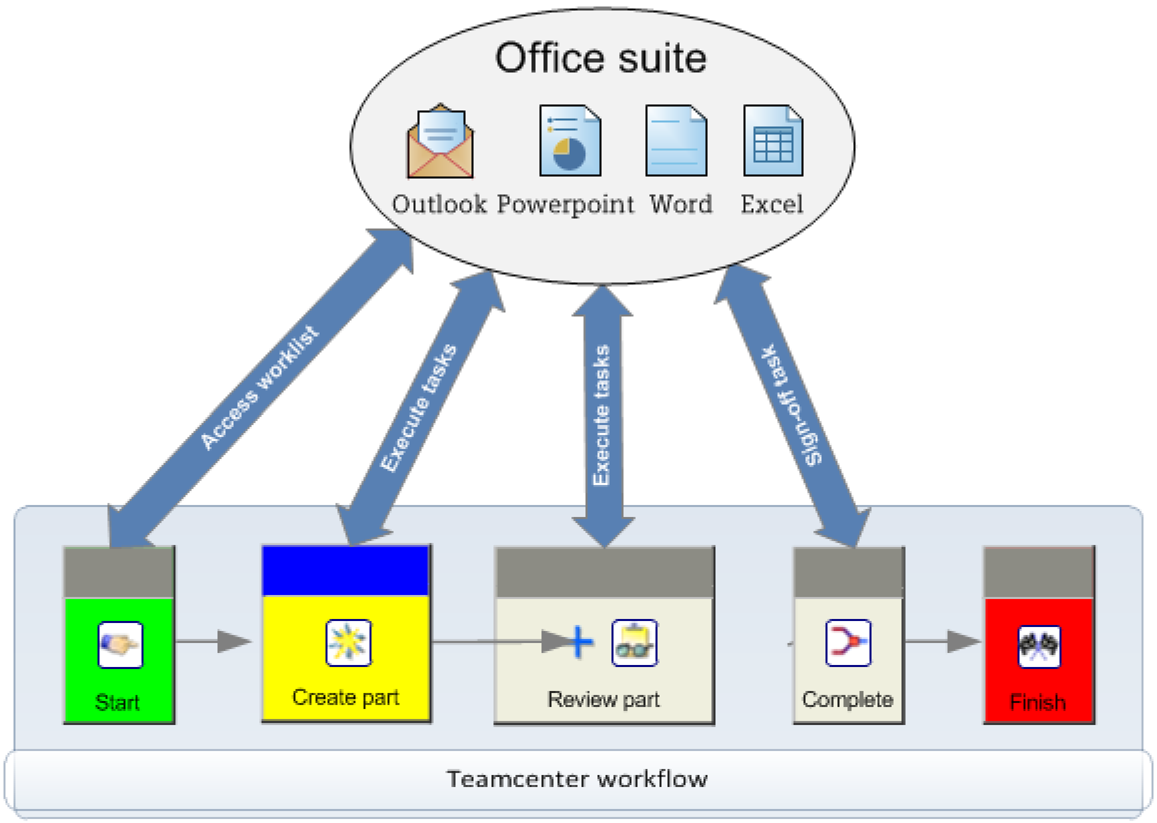
2. Right-click and choose **View Properties**.

3. In the **Properties Display** dialog box, navigate to the **Signed by** property to display the list of users who digitally signed the PDF file.

8. Managing Teamcenter workflow tasks using Client for Office

Overview of managing Teamcenter workflow tasks

Workflow is the automation of business processes to accomplish an objective. A workflow process is initiated by a user, and workflow tasks are assigned to users. Workflows pass documents, information, and tasks between participants during the completion of a particular process.



In Client for Office, you can manage workflow tasks by doing the following:

- Browse your worklist.

  Your worklist inbox contains the following folders:

  - **Tasks to Perform**

    Any tasks you are assigned appear in the **Tasks to Perform** folder. Once the completion criteria of a task are met (for example, the required quorum of approvals for a **perform-signoffs** task are granted), the task is complete and is removed from the folder.

  - **Tasks to Track**

    If you initiate a process, but are not responsible for the currently active task, Teamcenter places the task in the **Tasks to Track** folder. When the completion criteria of the task are met, the task is complete and is removed from the folder.

- Initiate a workflow process for a Teamcenter object.

  - When you initiate a workflow process, you are the process owner.

  - The root task of the process is placed in your Inbox, and you become the responsible party.

- Perform workflow tasks.

  - Pending tasks are in the **Tasks to Perform** folder.

  - Tasks you have performed are in the **Tasks to Track** folder.

- Reassign and delegate tasks.

  - Reassign a task to transfer ownership of the parent task to the selected user and make that user the responsible party for the task.

    > Note:
    >
    > Reassigning a task does not transfer your signoff responsibility.

  - Delegate your signoff responsibility to authorize another user to perform a **perform-signoffs** subtask that is currently assigned to you.

    If you are selected to a signoff team based on your inclusion under a signoff profile, you can only delegate the **perform-signoffs** subtask to another user who can match your signoff profile group and role.

    Otherwise, you can delegate the **perform-signoffs** subtask to any other user.

  - Reassign and delegate tasks using resource pools.

    You can use resource pools to balance workflow tasks between groups of users.

    - Resource pools let you balance workflow task assignments. They allow open-ended assignments, permitting any user to accept responsibility for a task that is assigned to a group, role, or a role in a group.

- Users have the option of subscribing to specific resource pool inboxes; however, they can only perform tasks if they are valid members of the group or are assigned the appropriate role. You can subscribe to resource pools using the Teamcenter rich client.

- Tasks assigned to a resource pool appear in the **Tasks to Perform** folder and the **Tasks to Track** folder of the appropriate resource pool inbox. Any member of the resource pool can then accept responsibility and perform the task.

• Select a sign-off team.

For a **select-signoff-team** task, your responsibility is to specify the users who are required to sign off the target object of the task.

• View all reviewer comments for a workflow task.

Note:

With Outlook and Teamcenter working together, you can access your workflow tasks, execute the tasks, and approve or reject the tasks without ever opening Teamcenter. Procedures for working with Outlook and Teamcenter workflow are slightly different than working with the other Client for Microsoft Office applications.

Workflow tasks

Workflow task types

A workflow *task template* is a blueprint of a workflow task. A task is a fundamental building block used to construct a workflow process. Each task defines a set of actions, rules, and resources used to accomplish that task.

Tasks	Definition
Do Task	This task has two options if at least one failure path is configured. **Complete** confirms the completion of a task and triggers the branching to a success path. **Unable to Complete** indicates the task is unable to complete, for various reasons. The task uses the **EPM-hold** handler to prevent the task from automatically completing when started.
Review Task	This task uses the **select-signoff-team** and **perform-signoffs** subtasks, each of which has its own dialog box.
Route Task	This task is the electronic equivalent of a routing sheet; the task is used to assign different responsibilities for the same task to multiple users. After you complete a **Route** task, users are notified of their tasks using Teamcenter

Tasks	Definition
	mail. This task uses the **Review**, **Acknowledge**, and **Notify** subtasks, each of which has its own dialog box.
Custom **form task**	This task carries your custom forms or other site-specific tasks for users to complete. You use the **EPM-display-form** handler to display the specified forms attached to a specified *custom* task and **EPM-create-form** handler to create an instance of a specified form and attach the form to the specified task. The **EPM-display-form** handler creates the form when the **Start** action is initiated, the **EPM-display-form** handler displays the form when the **Perform** action is initiated, and the **EPM-hold** handler to prevent the task from automatically completing, allowing the form to be completed by the user.
Condition Task	This task branches a workflow according to defined query criteria. It requires that the succeeding task contains a **check-condition** handler that accepts a Boolean value of either **True** or **False**.

Workflow task buttons

The workflow *process template* specifies the buttons and boxes that are displayed for the selected workflow task.

- Some buttons are specific to certain task types.
- Button and box elements may vary among tasks of the same type.
- Required elements for the selected task are marked by an asterisk (*****) in the worklist view.

Do task buttons

The following elements are displayed when you perform a **Do** task.

Elements	Description
Refresh button	Synchronizes the **Perform Workflow Task** view with the latest data in Teamcenter.
Comments box	Describes additional information about the task.
Password box	Your Teamcenter password. This box displays if the process template specifies user authentication.

Elements	Description
Complete button	Indicates that you completed the task. The task is removed from your **Tasks to Perform** folder.
Reassign button	Displays the **Reassign** dialog box, where you can change the role of responsible party from you to another user. The task is moved to your **Tasks to Track** folder.

Select signoff task buttons

The following elements are displayed when you perform a **select-signoff-team** task.

Elements	Description
Refresh button	Synchronizes the **Perform Workflow Task** view with the latest data in Teamcenter.
Comments box	Describes additional information about the task.
Password box	Your Teamcenter password. This box displays if the process template specifies user authentication.
Select Signoff Team button	Displays the **Select Signoff Team** dialog box, where you specify the users who need to review, acknowledge, or be notified of the task. This task is a subtask for the **Review**, **Acknowledge**, and **Route** tasks. For the **Review** task, you specify the users needed to review the task. For the **Acknowledge** task, you specify the users needed to acknowledge the task. For the **Route** task, you can specify the action and the users needed to perform the task. You can set the action to **Review**, **Acknowledge** or **Notify**.
Reassign button	Displays the **Reassign** dialog box, where you can change the role of responsible party from you to another user. The task is moved to your **Tasks to Track** folder.

Acknowledge task buttons

The following elements are displayed when you perform an **Acknowledge** task.

The following elements are displayed from the **perform-signoff-team** subtask of the **Acknowledge** task.

Elements	Description
Refresh button	Synchronizes the **Perform Workflow Task** view with the latest data in Teamcenter.
Password box	Your Teamcenter password. This box displays if the process template specifies user authentication.
Signoff Task and View all Reviews Decisions button	Displays the **Task Instructions** dialog box with the following elements: • **Acknowledged** button Indicates that you received the task and reviewed the document. The task is removed from your **Tasks to Perform** folder. • **Not Acknowledged** button Indicates that you received the task but did not review the document. The task remains in your **Tasks to Perform** folder. • **Delegate** button Displays the **Delegate** dialog box, where you can assign task responsibility to another user. The task is moved to your **Tasks to Track** folder. • **Comments** box Describes additional information about the task.

Review task buttons

The following elements are displayed when you perform a **Review** task.

The following elements are displayed from the **perform-signoff-team** subtask of the **Review** task.

Elements	Description
Refresh button	Synchronizes the **Perform Workflow Task** view with the latest data in Teamcenter.
Password box	Your Teamcenter password.

Elements	Description
	This box displays if the process template specifies user authentication.
Signoff Task and View all Reviews Decisions button	Displays the **Task Instructions** dialog box with the following elements: • **Approve** button Indicates that you received the task and approved the document. The task is removed from your **Tasks to Perform** folder. • **Reject** button Indicates that you received the task but rejected the document. The task is removed from your **Tasks to Perform** folder. • **No Decision** button Indicates that you received the task but did not review the document. The task remains in your **Tasks to Perform** folder. • **Delegate** button Displays the **Delegate** dialog box, where you can assign task responsibility to another user. The task is moved to your **Tasks to Track** folder. • **Comments** box Describes additional information about the task.

Condition task buttons

The following elements are displayed when you perform a **Condition** task.

Elements	Description
Condition path button	Indicates the workflow process continues along the branch specified by the condition path button based on the requirements listed in the **Instructions** box. For example, a **False** button indicates the workflow process continues along the *false* branch, and a **True** button indicates the workflow process continues along the *true* branch.

Elements	Description
	The task is removed from your **Tasks to Perform** folder.
Unset button	Prevents the task from completing and pauses the workflow process.
Unable to Complete button	Indicates that the task cannot be done. The task is removed from your **Tasks to Perform** folder. This button displays if the process template specifies a task failure path.
Reassign button	Displays the **Reassign** dialog box, where you can change the role of responsible party from you to another user. The task is moved to your **Tasks to Track** folder.

Form task buttons

The following elements are displayed when you perform a **Form** task.

Elements	Description
Custom form fields	Fields that are required to be filled in depending on the custom form carried with the task.
Complete button	Indicates that you did the task. The task is removed from your **Tasks to Perform** folder.
Unable to Complete button	Indicates that the task cannot be done. The task is removed from your **Tasks to Perform** folder. This button displays if the process template specifies a task failure path.
Reassign button	Displays the **Reassign** dialog box, where you can change the role of responsible party from you to another user. The task is moved to your **Tasks to Track** folder.

Browsing your worklist for assigned tasks

Introduction to browsing your worklist

Your worklist inboxes contain the following folders:

- **Tasks to Perform**

Any tasks you are assigned appear in the **Tasks to Perform** folder. Once the completion criteria of a task are met (for example, the required quorum of approvals for a **perform-signoffs** task have been granted), the task is complete and is removed from the folder.

- **Tasks to Track**

  If you initiate a workflow process, but are not responsible for the currently active task, Teamcenter places the task in the **Tasks to Track** folder. When the completion criteria of the task are met, the task is complete and is removed from the folder.

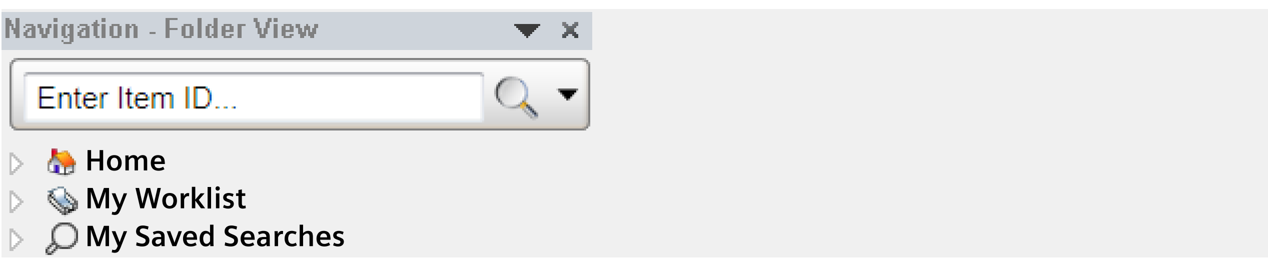
You can browse your worklist to display your inboxes and any subscribed resource pool inboxes. You must subscribe to resource pool inboxes, but you can only perform tasks from the resource pool if you are a valid member of the group or are assigned the appropriate role. Any member of the resource pool can then accept responsibility and perform the task. You can subscribe to resource pools using the Teamcenter rich client.

Browse your worklist using the Folder View

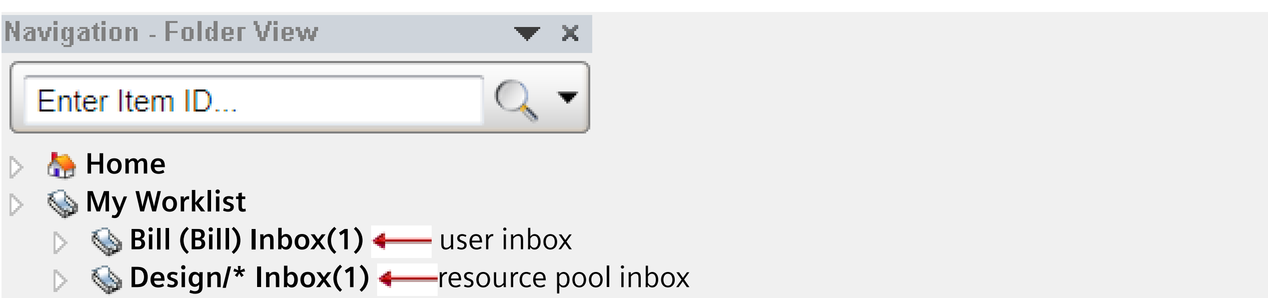
1. Click the **Teamcenter** tab→**Navigation and View** group→**Navigate** and choose **Folder View**.

   The **Folder View** displays your **Home** folder, your inbox, and your saved searches.

2. Click the button to the left of **My Worklist** to expand your worklist.

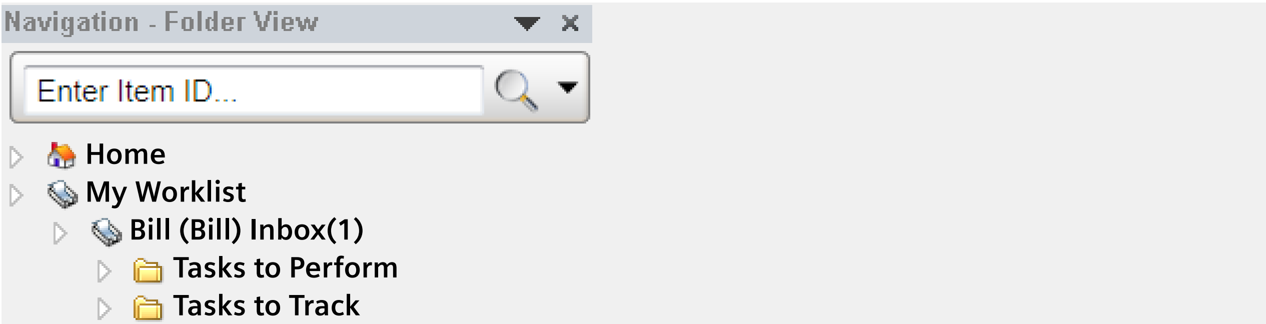


   Your inbox and any resource pool inboxes that you are subscribed to are displayed as shown in the following example.



3. Expand the inbox you want to display the tasks for.

The **Tasks to Perform** and the **Tasks to Track** folders are displayed as shown in the following example.



4. Expand the task folders to display the tasks and the tasks to display the targets.

   The **Tasks to Perform** and the **Tasks to Track** folders are displayed as shown in the following example.

5. You can do the following for each task:

   - To perform the task, right-click the task and choose **View/Perform Task**.

     The **Perform Workflow Task** view displays.

   - To insert the task object data into an open Office document, right-click the task and choose **Insert**.

6. You can right-click a task target and choose one of the following:

   - Choose **Properties** to view the properties in the **Properties Display** view.

   - Choose **Check-In/Out** to check in or check out the target in the **Teamcenter Check-In/Out** view.

   - Choose **Insert** to insert the object data into an open Office document.

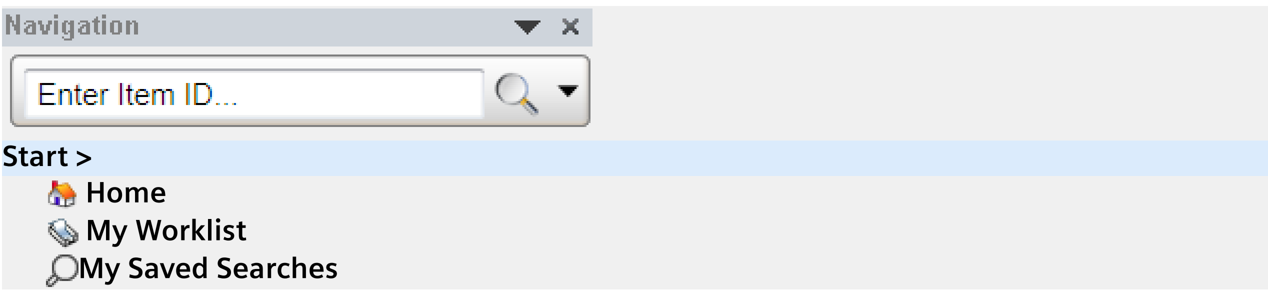
- Choose **Open File (Read-Only)** or **Open and Check-Out File** to open a target Office document for viewing or editing.

Browse your worklist using the Browse view

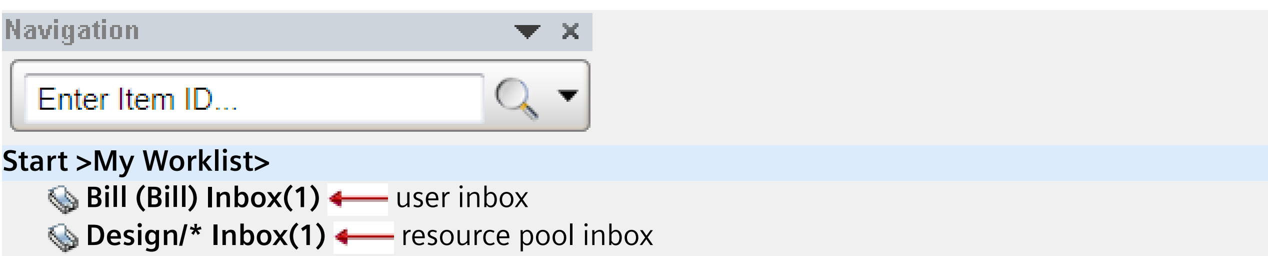
1. Click the **Teamcenter** tab→**Navigation and View** group→**Navigate** and choose **Browse**.

   The **Browse** view displays your **Home** folder, your inbox, and your saved searches.

2. Click **My Worklist** to expand your worklist.

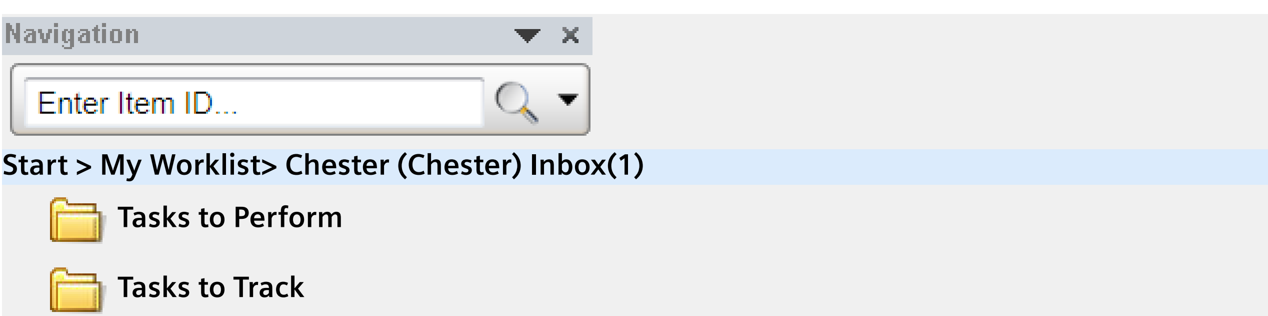


   Your inbox and any resource pool inboxes that you are subscribed to are displayed as shown in the following example.



3. Click the inbox you want to display the tasks for.

   The **Tasks to Perform** and the **Tasks to Track** folders are displayed as shown in the following example.

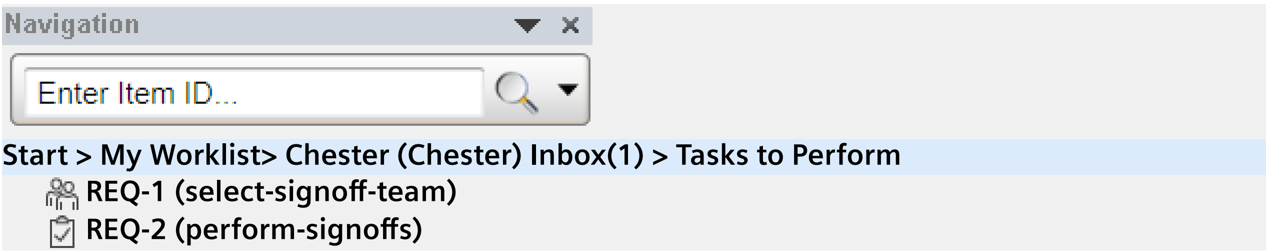


4. Click the task folders to expand them and view your tasks.

Note:

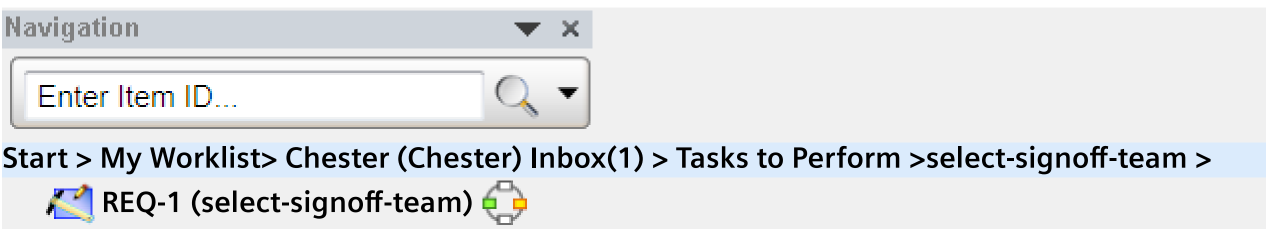
To return to a previous level in the **Navigation** view, click the level in the **Start** line at the top of the view.

Your tasks are displayed as shown in the following example.



5. Click the tasks to display the targets of the task.

   Your task targets are displayed as shown in the following example.



6. You can do the following for each task:

   - To perform the task, right-click the task and choose **View/Perform Task**.

     The **Perform Workflow Task** view displays.

   - To insert the task object data into an open Office document, right-click the task and choose **Insert**.

7. You can right-click a task target and choose one of the following:

   - Choose **Properties** to view the properties in the **Properties Display** view.
   - Choose **Check-In/Out** to check in or check out the target in the **Teamcenter Check-In/Out** view.
   - Choose **Insert** to insert the object data into an open Office document.
   - Choose **Open File (Read-Only)** or **Open and Check-Out File** to open a target Office document for viewing or editing.

Browse your worklist using the My Worklist view

1. Click the **Teamcenter** tab→**Workflow** group→**My Worklist** .

   The **My Worklist** view automatically navigates to your **My Worklist** folder and displays your inboxes.

   Your inbox and any resource pool inboxes that you are subscribed to are displayed as shown in the following example.

   Navigation
   Start > My Worklist>
   Bill (Bill) Inbox(1) user inbox
   Design/* Inbox(1) resource pool inbox

2. Click the inbox you want to display the tasks for.

   The **Tasks to Perform** and the **Tasks to Track** folders are displayed as shown in the following example.

   Navigation
   Start > My Worklist> Chester (Chester) Inbox(1)
   Tasks to Perform
   Tasks to Track

3. Click the task folders to display the tasks, and click the tasks to display the targets.

4. You can do the following for each task:

   - To perform the task, right-click the task and choose **View/Perform Task**.

     The **Perform Workflow Task** view displays.

   - To insert the task object data into an open Office document, right-click the task and choose **Insert**.

5. You can right-click a task target and choose one of the following:

   - Choose **Properties** to view the properties in the **Properties Display** view.
   - Choose **Check-In/Out** to check in or check out the target in the **Teamcenter Check-In/Out** view.
   - Choose **Insert** to insert the object data into an open Office document.

- Choose **Open File (Read-Only)** or **Open and Check-Out File** to open a target Office document for viewing or editing.

Initiate a workflow process from Client for Office

Note:

- A Teamcenter object must be open in the active Office application, and that file must be saved.
- The open object can be either the process target or another Teamcenter document.

Caution:

To initiate a workflow process from an offline live Word document, you must synchronize the document with Teamcenter.

1. Select the object in the **Folder View**, the **Navigation** view, the **Search Results** view, or the **Requirements** pane.

   The object can have an Office file type other than that of the active application.

2. Click **New Workflow Process** on the **Teamcenter** ribbon, or right-click the object and choose **New Workflow Process**.

   The **New Workflow Process** dialog box displays.

3. Type a name for the new process in the **Process Name** box.

   You can also type an optional description in the **Description** box.

4. In the **Process Templates** list, select the template to apply to the new process.

   Note:

   When **All** (the default) is selected, the **Process Templates** list shows all process templates. You can click **Assigned** to populate the list with only those process templates that are assigned to the object type.

5. Click **OK** to initiate the process.

   The item revision containing the Office document is routed to the workflow as the target of the new process.

Perform a task

1. Browse to the task in the **My Worklist** view, the **Navigation** view, or the **Folder View**.

2. Right-click the task and choose **View/Perform Task**.

   The **Perform Workflow Task** view displays.

3. Do the appropriate actions for the task, according to the elements displayed in the **Perform Workflow Task** view.

Reassign or delegate a task

1. Browse to the task in the **My Worklist** view, the **Navigation** view, or the **Folder View**.

2. Right-click the task and choose **View/Perform Task**.

   The **Perform Workflow Task** view displays.

3. Do one of the following:

   - Click the **Reassign** button to display the **Reassign** dialog box.

   - Click the **Delegate** button to display the **Delegate** dialog box.

4. Under **Organization Profiles**, expand the group and role nodes to display the user to whom you want to reassign the task.

   > Tip:
   >
   > You can quickly locate groups, roles, and users by using the controls at the bottom of the dialog box:
   >
   > - Type the group name in the box and click the **Search for Group** button.
   > - Type the role name in the box and click the **Search for Role** button.
   > - Type the user name in the box and click the **Search for User** button.
   >
   > Then, expand the nodes to display the user.

   You can restore the default settings by clicking **Refresh**.

5. Select the user and click **OK**.

The task is moved to your **Tasks to Track** folder and is sent to the new owner's **Tasks to Perform** folder.

Select a sign-off team

1. Browse to the task in the **My Worklist** view, the **Navigation** view, or the **Folder View**.

2. Right-click the task and choose **View/Perform Task**.

   The **Perform Workflow Task** view displays.

3. Click the **Select Signoff Team** button to display the **Select Signoff Team** dialog box.

4. In the **Organization Profiles** section, expand the nodes to display the appropriate group, role, or user.

   > Tip:
   >
   > You can quickly locate groups, roles, and users by using the controls at the bottom of the dialog box:
   >
   > - Type the group name in the box and click the **Search for Group** button.
   > - Type the role name in the box and click the **Search for Role** button.
   > - Type the user name in the box and click the **Search for User** button.
   >
   > Then, expand the nodes to display the user.

   You can restore the default settings by clicking **Refresh**.

   > Note:
   >
   > The **Organization Profiles** list must be created using the Teamcenter rich client.

5. In the **Signoff Team** section, select the **Users** node, and then do one or both of the following:

   - To add a group, role, or user to the sign-off team:

     a. Select the corresponding node under **Organization Profiles**.

     b. Click the left arrow in the center of the dialog box.

   - To remove a group, role, or user from the sign-off team:

a. Select the corresponding node group, role, or user under the **Users** node in the **Signoff Team** section.

b. Click the right arrow in the center of the dialog box.

Repeat these steps to add or remove other users for the sign-off team.

View workflow reviewer comments

1. Browse to the task in the **My Worklist** view, the **Navigation** view, or the **Folder View**.

2. Right-click the task and choose **View/Perform Task**.

   The **Perform Workflow Task** view displays.

3. Click the **Signoff Task and View all Reviews Decisions** button.

4. From the **Task instructions** dialog box and click the ▾ button under the **Decision** heading.

   - Click the **Approve** button to approve the document. The task is removed from your **Tasks to Perform** folder.

   - Click the **Reject** button to reject the document. The task is removed from your **Tasks to Perform** folder.

   - Click the **No Decision** button to indicate you did not review the document. The task remains in your **Tasks to Perform** folder.

5. Click the **Delegate** button if you want to assign the task responsibility to another user. The task is moved to your **Tasks to Track** folder.

6. Type a comment in the **Comments** box to describes additional information about the task.

7. Click **OK**.

Using Outlook to perform Teamcenter workflow tasks

Performing Teamcenter workflow tasks in Outlook

In Outlook, Client for Office incorporates Teamcenter workflow features through the **Teamcenter** custom toolbar and Teamcenter commands on the Outlook **Tools** menu.

Outlook displays the **Teamcenter** tab to access your Teamcenter worklist and initiate a workflow.

When you browse your worklist, the following folders are displayed:

- **Tasks to Perform**

  Any tasks you are assigned appear in the **Tasks to Perform** folder. Once the completion criteria of a task are met (for example, the required quorum of approvals for a **perform-signoffs** task have been granted), the task is complete and is removed from the folder.

- **Tasks to Track**

  If you initiate a process, but are not responsible for the currently active task, Teamcenter places the task in the **Tasks to Track** folder. When the completion criteria of the task are met, the task is complete and is removed from the folder.

You can also display your Teamcenter worklist tasks in your Outlook **To-Do List**. You use the command **Synchronize Teamcenter Tasks** to synchronize your Teamcenter tasks to your Outlook tasks.

You can also use Outlook to do the following:

- Browse your worklist.
- Perform Teamcenter sign-offs.
- Send an Outlook message containing Teamcenter task data.
- Save an Outlook message in Teamcenter.

Browse your worklist using Outlook

Use one of the following methods to display your worklist in Outlook:

- Click the **Teamcenter** tab→**Navigation and View** group→**Navigate** and choose **Browse**.

  The **Browse** view displays your **Home** folder, your inbox, and your saved searches.

  1. Click **My Worklist** to expand your worklist.

     Navigation
     Start >
     Home
     My Worklist
     My Saved Searches

     Your inbox and any resource pool inboxes that you are subscribed to are displayed as shown in the following example.

     Navigation
     Start > My Worklist>

Bill (Bill) Inbox(1) ⟵ user inbox
Design/* Inbox(1) ⟵ resource pool inbox

2. Click the inbox you want to display the tasks for.

   The **Tasks to Perform** and the **Tasks to Track** folders are displayed as shown in the following example.

Navigation
Start > My Worklist> Chester (Chester) Inbox(1)
Tasks to Perform
Tasks to Track

3. Click the task folders to expand them and view your tasks.

   > Note:
   >
   > To return to a previous level in the **Navigation** view, click the level in the **Start** line at the top of the view.

   Your tasks are displayed as shown in the following example.

Navigation
Start > My Worklist> Chester (Chester) Inbox(1) > Tasks to Perform
REQ-1 (select-signoff-team)
REQ-2 (perform-signoffs)

4. Click the tasks to display the targets of the task.

   Your task targets are displayed as shown in the following example.

Navigation
Start > My Worklist> Chester (Chester) Inbox(1) > Tasks to Perform >select-signoff-team >
REQ-1 (select-signoff-team)

- Click the **Teamcenter** tab→**Navigation and View** group→**Navigate** and choose **Folder View**.

  The **Folder View** displays your **Home** folder, your inbox, and your saved searches.

  1. Click the ▷ button to the left of **My Worklist** to expand your worklist.

Navigation - Folder View
▷ **Home**
▷ **My Worklist**
▷ **My Saved Searches**

Your inbox and any resource pool inboxes that you are subscribed to are displayed as shown in the following example.

Navigation - Folder View
- Home
- My Worklist
  - Bill (Bill) Inbox(1) ← user inbox
  - Design/* Inbox(1) ← resource pool inbox

2. Expand the inbox you want to display the tasks for.

   The **Tasks to Perform** and the **Tasks to Track** folders are displayed as shown in the following example.

Navigation - Folder View
- Home
- My Worklist
  - Bill (Bill) Inbox(1)
    - Tasks to Perform
    - Tasks to Track

3. Expand the task folders to display the tasks and the tasks to display the targets.

   The **Tasks to Perform** and the **Tasks to Track** folders are displayed as shown in the following example.

Navigation - Folder View
- Home
- My Worklist
  - Bill (Bill) Inbox(1)
    - Tasks to Perform
      - REQ-1 (perform-signoffs)
        - REQ-1 (perform-signoffs)
    - Tasks to Track

- Click the **Teamcenter** tab→**Workflow** group→**My Worklist** .

  The **My Worklist** view automatically navigates to your **My Worklist** folder and displays your inboxes.

  Your inbox and any resource pool inboxes that you are subscribed to are displayed as the example shows below:

Navigation
Start > My Worklist>
- Bill (Bill) Inbox(1) ← user inbox
- Design/* Inbox(1) ← resource pool inbox

1. Click the inbox you want to display the tasks for.

   The **Tasks to Perform** and the **Tasks to Track** folders are displayed as shown in the following example.

Navigation
Start > My Worklist> Chester (Chester) Inbox(1)
Tasks to Perform
Tasks to Track

2. Click the task folders to display the tasks, and click the tasks to display the targets.

Display your Teamcenter workflow tasks

1. In Outlook, click the **Tasks** button at the bottom of the navigation pane.

   The contents of your Teamcenter inbox are displayed along with your Outlook tasks.

2. To display your to-do list:

   a. Choose **View**→**To-Do Bar** and select **Normal** and **Task List**.

   b. Under **My Tasks**, select **To-Do List**.

      The contents of your Teamcenter inbox are displayed in your to-do list.

3. Double-click the task in your task list or to-do list to display the task information and the related attachments.

Update your Teamcenter worklist

1. Display your Teamcenter tasks in your Outlook **To-Do** list or **Tasks** list.

2. Click the **Teamcenter** tab→**Workflow** group→**Synchronize Tasks** .

   Depending on the current contents in Teamcenter, tasks are added to or deleted from your task lists.

Perform Teamcenter sign-offs

1. With your Teamcenter tasks displayed, do one of the following to open a **(perform-signoffs)** task:

   - In the Outlook **Tasks** list or the **To-Do List**, double-click the task to open it in a separate Outlook task window.

> Note:
>
> In the separate window, click the **Perform Task** button on the **Teamcenter** ribbon to open the **Perform Workflow Task** view.

- In the **To-Do List**, click the task to open it in the Outlook reading pane.

2. Use the elements in the separate window or the Outlook reading pane to do the appropriate actions for the task type.

   When the sign-off is complete, the task is removed from the **Teamcenter Tasks to Perform** category.

Open an Outlook message stored in Teamcenter

1. Select the **Teamcenter** tab→**Navigation and View** group→**Navigate** and choose **Browse** or **Folder view**.

   The Teamcenter folders are displayed.

2. Expand your **Home** folder and navigate to the Outlook dataset.

3. Right-click the message and choose **Open File (Read-Only)** or **Open and Check-Out File**.

   > Note:
   >
   > To edit the message, you must reply to or forward the message. Then, save the changes as a new message in Teamcenter.

Send an Outlook message containing Teamcenter task data

1. Open the message in Outlook.

   You can use a new message, a reply to a message, or a message that you forward.

2. Browse your Teamcenter worklist to display your **Tasks to Perform** and **Tasks to Track** folders.

3. Expand your inbox to display the **Tasks to Perform** and **Tasks to Track** folders.

4. Click or expand a task folder to display the individual tasks and navigate to the task you want to insert as part of the message.

5. Place the cursor at the insertion point in the message.

6. Right-click the task and choose **Insert**.

> Note:
>
> You can choose data insertion options and the columns to insert.

The data appears at the cursor location in the message.

7. Send the message.

Save an Outlook message in Teamcenter

1. Open the Outlook message you want to save.

2. Click the **Teamcenter** tab→**Data Management** group→**Save As**→**Dataset**.

3. On the left side of the **Teamcenter Save As** dialog box, navigate to the Teamcenter location where you want to save the message.

4. Type the message name in the **File Name** box.

   You can also enter an optional description in the **Description** box.

5. Click **Save**.

   The message appears in the selected location.

Save a Microsoft Outlook message in Teamcenter in an email item revision

1. Create an item of type **Email**. To do so, choose **File**→**New**→**Item**.

2. In the **Create New Item** dialog box, select **Object Type** as **Email**.

3. Specify other information such as **Item Revision Information** and click **Finish**.

4. Follow the steps listed above in this topic to save the email into the item revision.

   The email message is saved under the selected email item revision.

A. Known issues and workarounds for Client for Office

Microsoft .NET framework WebBrowser control issues

The .NET framework provides a WebBrowser control that allows a C# application to host Web pages and provide WebBrowser capabilities. This WebBrowser control is based on functionalities of Microsoft’s Internet Explorer.

The following are known issues with the WebBrowser control:

- **The web client text box events are not recognized during typing or editing**

  When hosting the web client within Teamcenter Client for Office, certain web client text controls perform filtering actions simultaneously as a user types in a text box. The filtering actions are triggered by key press events. Due to issues with Microsoft's .NET WebBrowser control, which is used by the Teamcenter Client for Office to host the web client, the key press events are not recognized and the subsequent filtering actions do not happen. Similarly, when the web client property fields are being edited, the background of the text box fields changes to indicate that the property is changed. Again, within the Teamcenter Client for Office, the text box background color does not change since the key press events are not being recognized by the .NET WebBrowser control.

  How to work around or avoid

  Click anywhere outside the text box to trigger the event required by the web client code to perform the filtering or highlighting actions.

- **Security interferes with downloading a file**

  Selecting the **Download File** button from the security pop-up at the top of the task pane causes the browser to automatically reload the page. The user must reselect the **Download File** button. However, after the page reloads, the web client loses the previous location information and users cannot navigate back to their list of tasks.

  How to work around or avoid

  To view your tasks:

  1. Close the task panel, or click the **My Worklist** button on the Teamcenter ribbon to close the **Worklist** task pane.

  2. Click the **My Worklist** button on the Teamcenter ribbon to reload the **Worklist** task pane.

- **Changes to an edited property value may be lost**

When hosting the web client summary pages within Teamcenter Client for Office, and when editing properties within the **Summary** page, changes made within the first text box are not recognized until you click elsewhere on the page. If you were modifying a property value and then navigated away from the page before the changes were saved, the changes are lost.

How to work around or avoid

After making edits in the first text box, click anywhere else on the page, including a second editable text box. This highlights the edited text box in yellow, indicating that its value is modified. If you now navigate away from the page, you are prompted to save or discard the edits.

Microsoft Excel Issues

- **Download of an Excel file from the hosted web client dialog window is blocked**

  When Teamcenter Client for Microsoft Office is hosted on the web client and you attempt to download a Microsoft Excel file from the web client user interface, the Excel file does not open until the pop-up dialog window is closed. This is because the pop-up (modal) dialog window blocks the message queue because of which Microsoft Excel is unable to open the downloaded spreadsheet.

  How to work around or avoid

  Close the popup dialog window, and Microsoft Excel opens the requested file.

- **Teamcenter Client for Office context menus fail to work under certain conditions**

  From the navigation (**Folder** or **Browse**) task pane in Microsoft Excel, if you open a context menu for the selected object, and it overlaps the spreadsheet window, the selection event might not work if the mouse pointer is also over the spreadsheet window. The behavior is as if there is a hole in the context menu and the click event happens in the spreadsheet cell directly underneath the context menu.

  How to work around or avoid

  As long as the navigation task pane is completely underneath the entire context menu, the menu action works as expected. Expand the navigation task pane so that it is wide enough for the context menu to entirely cover the navigation task pane.

- **Unable to edit the property of a checked-out object in Microsoft Excel**

  While using the Teamcenter Client for Microsoft Office (Office Client) **Properties** dialog window within the Microsoft Excel application, you cannot modify or edit the text of the desired properties. The text being typed is displayed in a cell of the Excel spreadsheet, rather than within the text field of the **Properties** dialog window.

  How to work around or avoid

From the **Properties** dialog box, click the **More Properties...** link to display a modal dialog box, and edit the desired properties from here.

- **Interoperability issues with Microsoft Excel and editing properties in the Office Client**

  When editing properties of a checked-out Teamcenter object in the **Summary** view properties dialog box within Microsoft Excel, entering values into a text box field causes the data to be typed into one of the Excel cells, rather than in the property text box field.

  How to work around or avoid

  From the **Properties Display** dialog window, click the **More Properties...** link, which displays another dialog window containing all the editable properties. From this dialog window, the properties can be modified without interoperability issues that occur when using the **Properties Display** dialog window.

Microsoft Outlook Issues

- **The delete key on the keyboard fails to delete emails in Outlook**

  After a user clicks any object in Teamcenter task pane in Microsoft Outlook, the Delete key on the keyboard does not delete the selected email.

  How to work around or avoid

  Use the **Delete** option from the context menu. Microsoft technical support provides the following workaround: Right-click any email to display the context menu, or switch tabs on the ribbon (in Outlook 2010). After this, the Delete key works.

- **Spacebar and backspace keys do not work in Outlook**

  Due to an unresolved issue within Microsoft Outlook, the Spacebar and Backspace keys do not work within a hosted web client user interface when typing within text input fields such as comment boxes and filters.

  How to work around or avoid

  Use the following keys:

  - Use CTRL+Spacebar for the space character.

  - Use SHIFT+Backspace to delete the last character.

General Hosted Web Client Issue

- **Certain web client commands (buttons) are not available**

When the web client is hosted in Teamcenter Client for Office and displayed in narrow task panes, certain web client commands (buttons) are not available in the user interface as displayed by default in the task pane.

How to work around or avoid

Resizing the task pane to be wider than the default width exposes additional user interface elements, including commands (buttons) that are missing in the narrow task pane view.