TEAMCENTER

Retail Footwear and Apparel — Fundamentals

Teamcenter 2412

SIEMENS

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1. Introduction to Retail Footwear and Apparel

About Retail Footwear and Apparel

Retail Footwear and Apparel is a solution tailored to manage products in the retail industry, which is ever evolving and fast paced. New products or styles are launched continuously throughout the year. Product choices and colors change frequently, with the fashion trends and seasons. As a result, making the products available in the market on time is crucial. For example, winter clothing must be made available in stores toward the end of fall, before the onset of winter. It is stocked through winter, spanning a short seasonal time frame. It is therefore important that buyers collaborate with the different *partners* who manufacture the products. Further, costs are evaluated to find the correct price that meets both product quality and profit margin targets.

Using Retail Footwear and Apparel, you can:

- Manage product and material costs.
- Manage the product planning and product development process.
- Capture fashion data and technical design data.
- Collaborate internally and across the supply chain.

Working with Retail Footwear and Apparel

Accessing the commands and tools panel

On a wide-screen display, commands and tools appear in toolbars along the top and down the sides of Active Workspace.

Information

Displays the information task panel for the selected object.

The information displayed is based on the selected object, such as sample request, your group and role, and the site configurations.

Submit to Workflow

Creates a new workflow process for the selected item.

Save Search

Saves your search criteria.

Save As or Revise

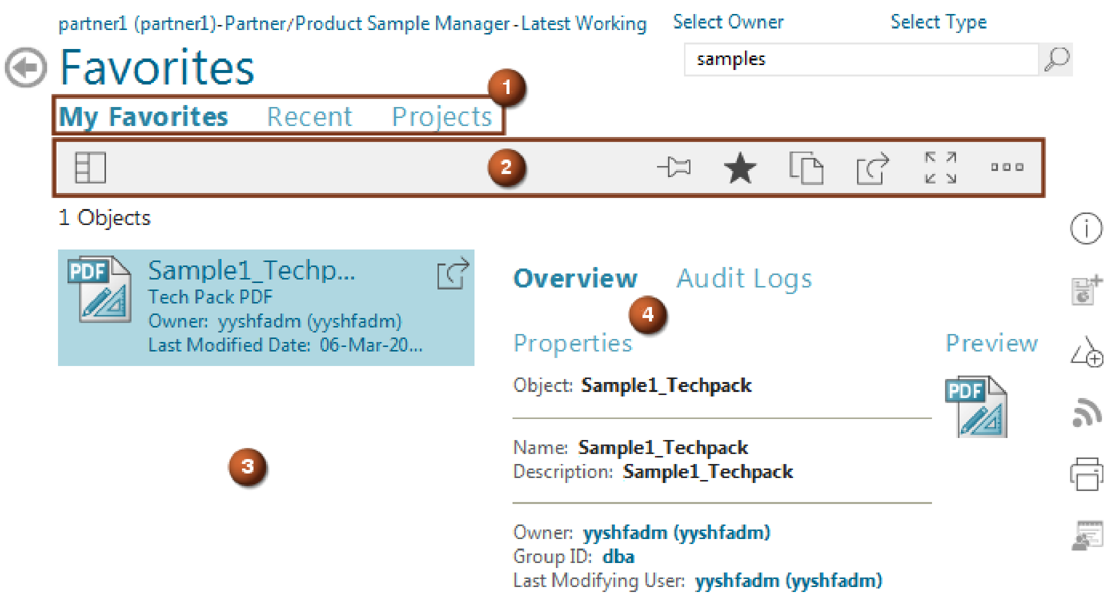
Creates a new revision of the object or a new object with a new ID.

Replace File

Replaces an existing dataset file with an identically named file.

Organizing your data

You can use *favorites* to track the objects you access frequently, such as samples, sample requests, forms, or processes.



1 Various *navigation tabs* appear under the page title.

For example, on the **Favorites** page, the **My Favorites** and **Recent** tabs are available.

My Favorites	Displays all the objects you flagged as a favorite.
Recent	Displays recently visited objects.

2 One-step commands are displayed above the *work area*.

3 The *list* area displays a list of parts, documents, or other objects relevant to the current page.

4 The *work area* displays details about the selected object when the **List with summary** display option is selected. The details that are displayed depend on the type of object selected.

Note:

If there are more tabs to be displayed than the available space, a right-chevron is displayed.

- Tap or click the chevron to switch between the available tabs. The content area is not updated unless the active tab switches to another.
- Tap or click a partially displayed tab, indicated by ellipses, to fully display the tab and to update the content area.

Access frequently used items

You can create a shortcut to your frequently accessed items by pinning the tiles on the home page.

1. Select the object you want to add to the home page.

   You can add an object from locations such as your **Home** folder, favorites, or search results.

2. In the toolbar, click the **Pin** button.

   The selected object appears as a tile on your home page.

Similarly, you can pin a notification message to the Active Workspace window.

Arrange the tiles displayed on the home page

Tiles are arranged in groups on the home page. You can drag and drop tiles to create new groups, rearrange the tiles within a group, or move tiles between groups.

To select a tile to be moved, right-click with the mouse, or press and hold on touch devices.

Move a tile from one group to another

1. Select a tile.

2. Drag it to the new group and position near an existing tile, until you see the outline indicating the new tile position.

3. Drop the tile in the new position.

Move a tile and create a new group

1. Select a tile.

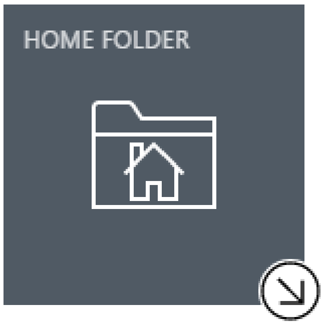
2. Drag it to an area between existing groups until you see the vertical bar indicating the new group position.

3. Drop the tile.

   The tile is displayed in the new group.

Resize a tile

1. Right-click the tile you want to resize, or left-click and hold the tile until you see an arrow button in the lower-right corner of the tile.

   On a touch device, tap and hold a tile to enter edit mode.

2. Click the arrow button in the lower-right corner of the tile.

   Depending on the current size of the tile, the tile either becomes smaller or larger in size.

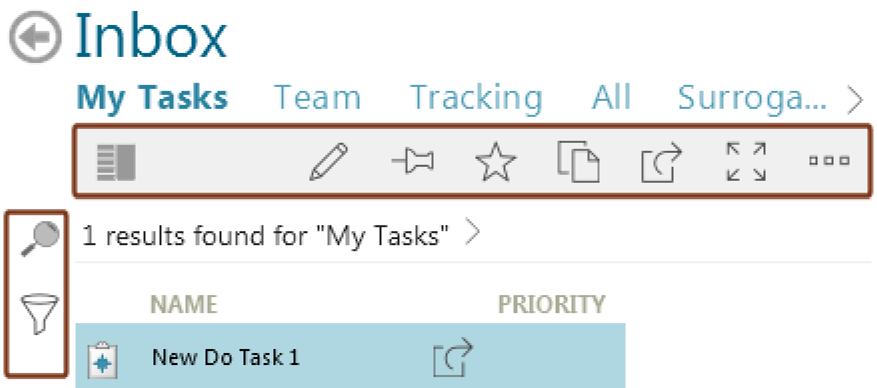
   Some tiles, such as **Inbox**, display different information depending on the tile size.

3. To save your changes, click in a blank area on the home page.

Modify sample requests using the work area commands and tools

On a wide-screen display, commands and tools appear in toolbars along the top and down the sides of Active Workspace pages.

One-step command icons appear in a toolbar at the top of the work area. Use these commands to edit and update the relevant elements, such as sample requests and point of measure (POM) details.



Search for information

You can search for information in Active Workspace by either using text or shape. You can then save these searches. You can also view the results as a list and in the form of a bar chart that displays the search results by type.

1. On the home page, enter the search criteria in the **Search** box with suggestions and filter categories.

2. Select the request or task to view the details in the **Overview** tab.

3. Click the **Attachments** tab to view the files attached with the search result.

You can also define and save your search criteria.

Change the password

1. On your homepage, select **Profile**.

2. Click **Change Password**.

3. In the **Change Password** panel:

   a. Type your current password.

   b. Enter a new password.

   c. Retype the new password to confirm it.

4. Click **Change**.

Reassigning tasks

Scenarios for reassigning tasks

You can balance your workload or manage assignments for others if they are out of the office. You can do this by designating certain users or groups as *surrogates*. To do this, you must set up surrogates to perform the workflow tasks on your behalf. Similarly, you can perform the tasks of the other users for whom you are a surrogate. Once you have set up surrogates, you can reassign the tasks to them.

In other cases, you might want to reassign tasks altogether to a different user. If you are the responsible party or a privileged user, you can reassign any task that has not already been started. For example, if you are the initiator of a process, the tasks of selecting a signoff team and performing signoffs are automatically assigned to you. You may want to reassign one task or both these tasks to another user. You can also assign all future tasks in the workflow to the user.

Set up surrogates for your tasks

You can assign your tasks and sample requests to other users. To designate these users as surrogates:

1. Select the **INBOX** tile on the home page and in the **My Tasks** tab, select the task that you want to reassign to a surrogate and click **Open**.
2. In the **Overview** tab, in the **Properties** section, select **Assignee** to specify surrogates for this task.
3. In the **My Surrogates** section, click **Add Surrogate**.
4. In the **Add Surrogate** section, specify the **Start Date** and time.
5. Specify the **End Date** and time and click **Add** to add users.
6. (Optional) Enter the filter criteria to search for the relevant user.
7. Select the user to add them to the list of surrogates.
8. (Optional) Similarly, add more users to the list of surrogates and click the **Add** button at the bottom of the **Add Surrogate** section.

The surrogate receives an email in their inbox with details about the user for whom they have been assigned as surrogates.

To remove a surrogate, in the **My Surrogates** section, select the relevant surrogate and click **Remove Surrogate**.

Reassign tasks to other users

To reassign your tasks to a different user:

1. Search for and open the sample request that you want to reassign.

2. In the right pane, click .

3. In the **Reassign Task** section, click **Users**, enter the filter criteria, and press Enter.

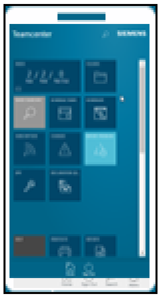
4. Select the user to whom you want to reassign the task, specify any specific **Comments**, and click **Reassign**.

2. Exploring the Active Workspace interface

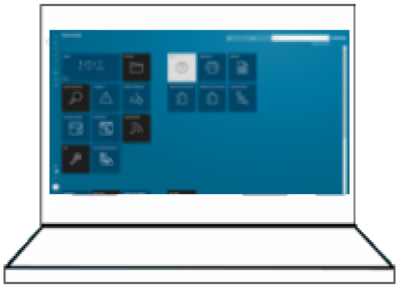
Using Active Workspace on different devices

Active Workspace is a web-based client for Teamcenter that runs in a browser on traditional computers using mouse and keyboard inputs and on touch displays found on contemporary Windows devices, and on OS X and Android tablets and smart phones.

- On touch-enabled devices, you can use standard touch gestures to navigate and select commands and objects.



- On a desktop or laptop computer, you can use the left mouse button to select commands and objects and the keyboard for shortcuts or tabbing through the interface.



  - In the **Viewer** view, you can use the left mouse button while pressing the Control (pan) or Shift (zoom) keys to modify the default geometry navigation controls.
  - In some situations you can use the right mouse button to enable additional commands, as described in context in the user documentation such as the instructions for arranging columns in a table display, resizing tiles, and working with data in the **Relations** and **Architecture** tabs.

Note:

The standard keyboard shortcuts for cut, copy and paste (**Ctrl**+X, **Ctrl**+C, **Ctrl**+V) are supported when those commands are available on the page.

Working in narrow mode and on a mobile device

The user interface adapts to the available space, whether running on a computer monitor, tablet, phone, or within another application.

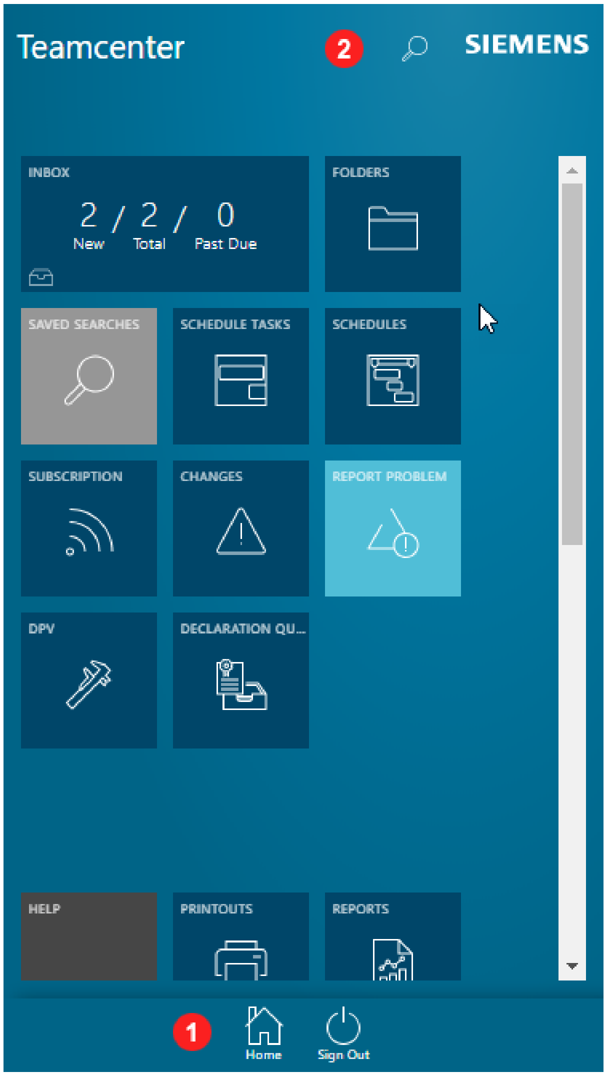
As the available space is reduced, layout or functionality adjusts to it. For example, tables are available for a wide layout, but are replaced by lists of tiles in a narrow layout, and commands move from the sides of a wide layout to the bottom of a narrow layout.

Note:

When you are working with files on iOS, Android, or Windows Phone systems, the device controls the **Browse** button and provides a dialog that lets you choose how you want to locate files. These systems may also let you select a camera to directly import images.

Using the narrow interface

The narrow interface uses a one-panel system for displaying features.



1 Primary toolbar

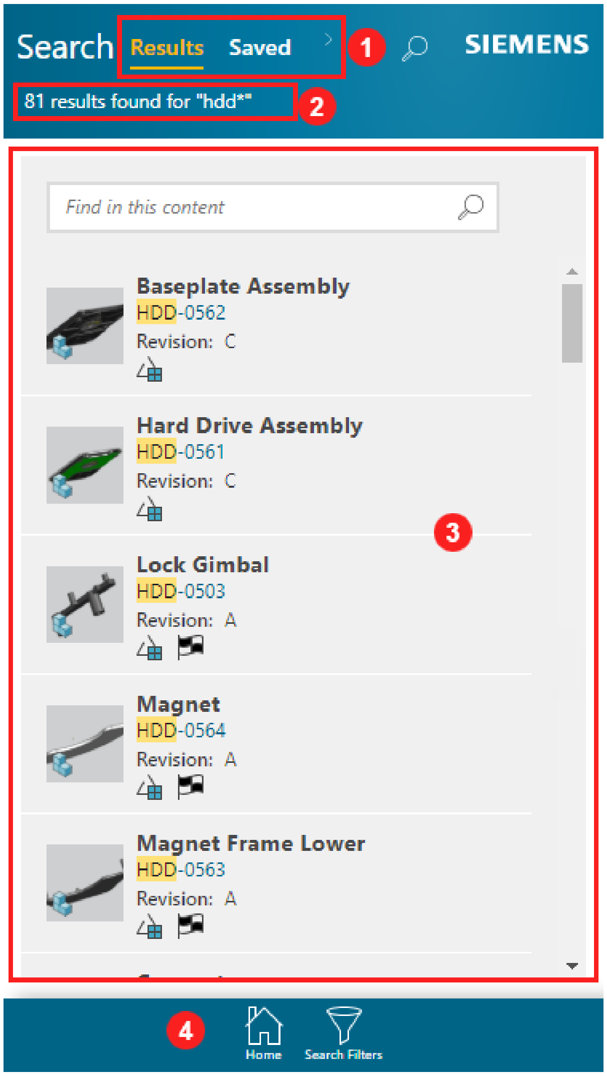
Displays the available commands, such as **Home** and **Sign Out**. Other commands are available from other locations in the user interface.

> Note:
>
> **Sign Out** is available only on the home page.

2 Global search

Searching

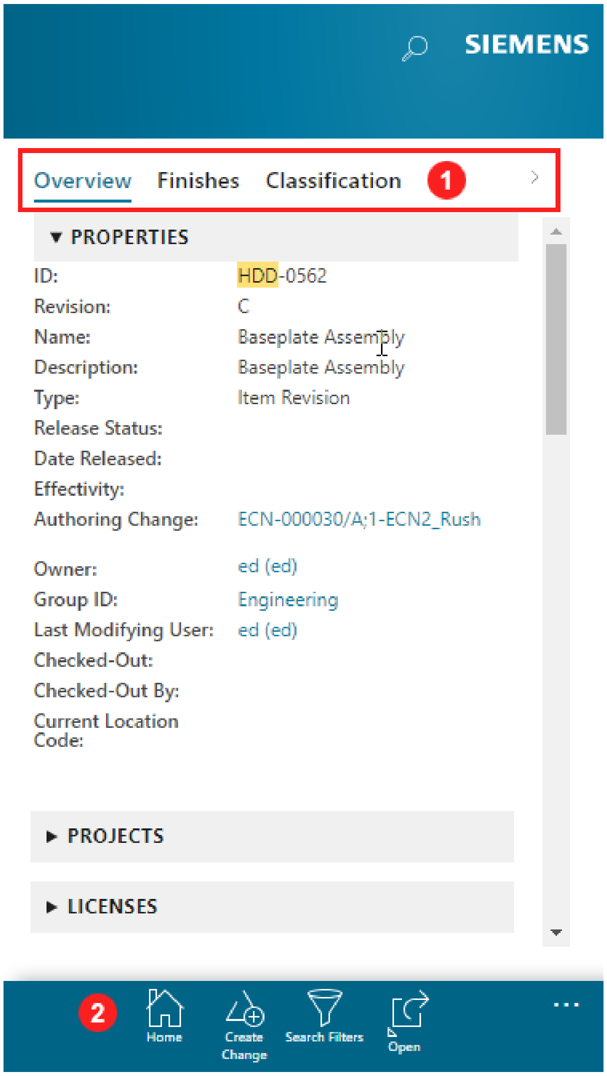
When you use search in the narrow interface, the list of search results appears as shown in the following figure.



1	Pages available with **Search**
2	Displays the number of search results and the filtering breadcrumbs.
3	Displays the list of search results. Tap a result object to replace the search results list with information about the object.
4	Primary toolbar with available commands.

Viewing details

Tap an object in any primary work location, such as search results or a folder, to display the secondary work area with details about the selected object.



1 Displays tabs containing details about the selected object. The information that displays is based on the selected object, your group and role, and the site configurations.

If there are too many tabs to display in the available space, a right-chevron > is displayed.

- Tap the right-chevron button > to select summary information tabs from a menu such as **Overview** and **Where Used**.

The content area does not update unless you select a new tab from the menu.

The information displayed is based on the selected object, your group and role, and site configurations.

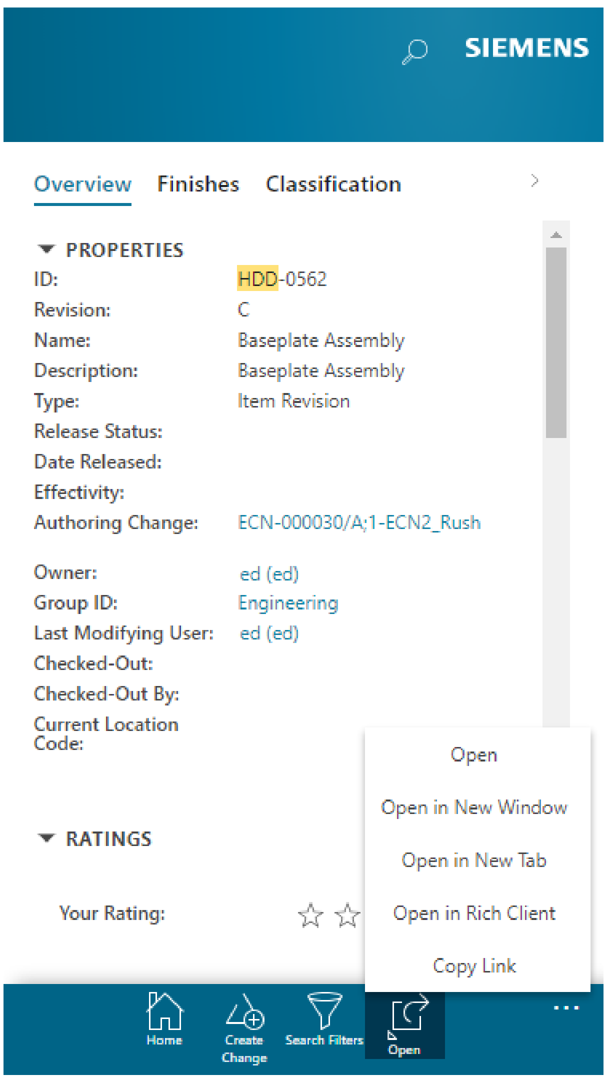
- Tap a partially displayed tab, indicated by ellipses, to fully display the tab and update the content area.

2 Primary toolbar with available commands.

When the number of available commands exceeds the available space, you can tap **More** ▫▫▫ to display more.

Opening objects

In any location in the narrow interface, tap **Open** to display the menu.



Select **Open** to open the object, or select another option available on your device.

Setting up your user environment

User properties

This topic introduces several fundamental concepts that are important for new users to know about when getting started with Active Workspace. If you have used Teamcenter rich client these concepts should be familiar to you.

Active Workspace and Teamcenter users work within a context which is a combination of several user properties:

- **Group**
- **Role**
- **Program**
- **Project**
- **Workspace**

You can control some aspects of data presentation within a context by setting these additional properties:

- **Revision rule**
- **ID Display rule**

Depending on your position in your organization, you may need to work in different contexts at different times. Your assignments for group, role, and project by your administrator should reflect that, in which case you can easily switch contexts during your session. You can also manage some properties from your user profile page. The following sections provide more information.

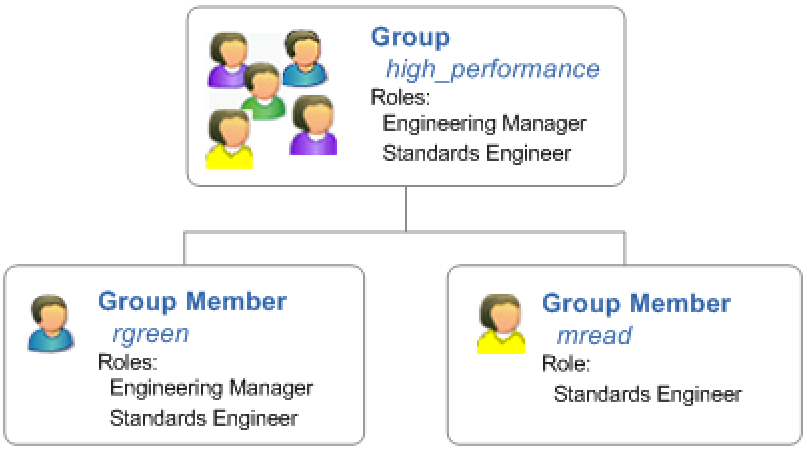
Group

A **group** is a named set of users who share one or more specific types of work in common, and who have the same access permissions for data and locations. Groups may be synchronized with the company's user authentication system. Users may be assigned to more than one group. Assignment of users to groups is done by administrators or privileged users. In an automotive engineering context, you might see group names such as Drivetrain, Electronics, HVAC, and Simulations

If you are assigned to more than one group, you can set one as your default group at log-on in your profile page. You can quickly switch to another group by clicking your profile icon and selecting it in the **Group** list in the pop-up. The list contains only the groups of which you are a member.

Role

A **role** defines a specific job function within a group. Roles are attached to groups and users are assigned to one or more roles within a group. You can set your default role for groups of which you are a member in your **profile page**. In an automotive engineering context, you might see role names such as Designer, Engineer, Tester, and Approver.



Program

A **program** provides organizations a means to define, organize, and manage large bodies of work that have a lifecycle and which come and go over time. Program names may denote a product or product family. For example, in an automotive engineering context, you might see program names such as Mid-size Car, Compact Car, Light Truck, and Compact SUV. However, programs may be about something more abstract. The decision is up to the organization. For more information about programs, see **What are projects and programs?**

Project

A **project** is a component of a program. Programs typically have multiple projects, each of which has a lifecycle. Administrators can assign users, roles, or groups to a project thereby controlling access to the project's data. Typically, if you are not a member of a project, you cannot see or work with the data. In an automotive engineering context, you might see project names such as Mid-size Car Powertrain or Compact SUV Infotainment.

To view projects to which you have access. You can use the **PROJECTS** tile on the **Home** page, or the **Projects** folder in **Explorer**. If you have the necessary permissions you can also create projects and programs and manage your project teams by correlating groups of users, potentially at different physical sites, with your product data. You can quickly switch to a different project by clicking your profile icon on the global header and selecting it in the **Project** list in the user proprieties pop-up. For more information about projects, see **What are projects and programs?**

Workspace

A **workspace** is an out-of-the-box configuration that controls which commands users see and which pages they can access when they log on. Workspaces are mapped by administrators to a group, a role, or a group-role combination. You are always assigned at least one workspace via your group and role assignments.

Information about your workspace assignments, the commands you can run and what data you can access in each workspace should be provided by your organization. If you are assigned to more than one workspace, you can change to a different one by clicking your profile icon on the global header and selecting it in the **Workspace** list in the pop-up. If you are assigned to only one workspace, the **Workspace** list does not appear.

Revision rule

A **revision** is a unique, specific iteration of a previously created object such as a part, an assembly, or a document. In Active Workspace, your current revision rule determines which revision of an object will be returned by a search or shown in a product structure. For example, you can choose whether to load working revisions or release revisions.

A privileged user or an administrator can configure revision rules. You can select the revision rule you want to use in your user properties, displayed when you click your profile icon. For more information see **Change your revision display**.

ID Display rule

Identifier (ID) display rules let you select the context in which items and item revisions are displayed for you. If no rule is applied, the initial identifier attribute is displayed. For more information see **Create and change ID display rules**.

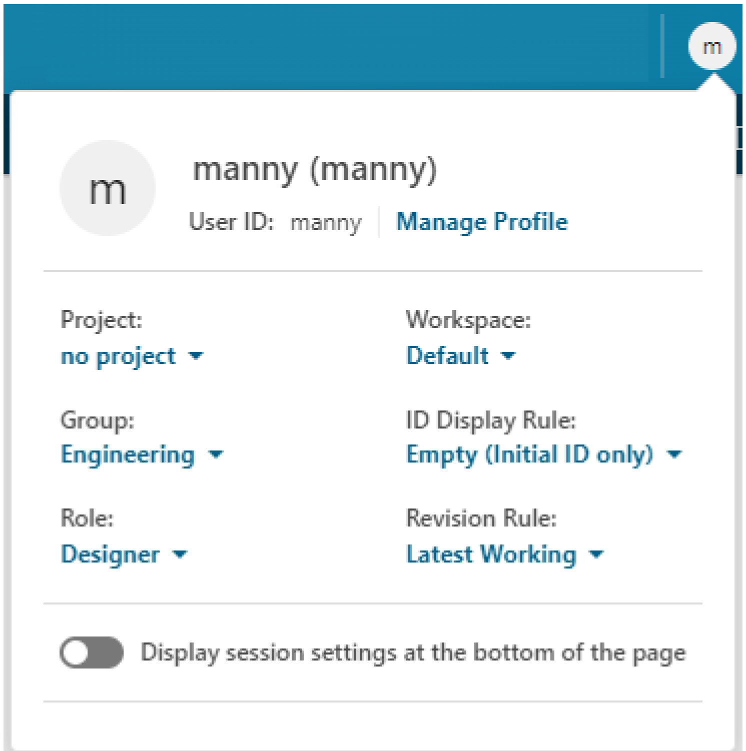
View and change your user properties

User properties determine your current working context. You can change your context by setting different values in your user properties.

Procedure

1. In the global header, click your profile icon.

   A pop-up panel appears displaying the current settings of your user properties.



2. In the panel, change the value in one or more properties.

   For example, if you want a different workspace, select it in the **Workspace** property.

   > Note:
   >
   > The properties displayed in the pop-up can vary depending on your group and role. For example, if only one workspace is configured for your role, the **Workspace** property is not present.

Manage your User Profile

Your user profile page enables you to provide information about yourself that other users can see, and also set a number of defaults and personal preferences that are applied when you work in Active Workspace. This topic explains how to access the page and describes the most common settings that new users may want to adjust.

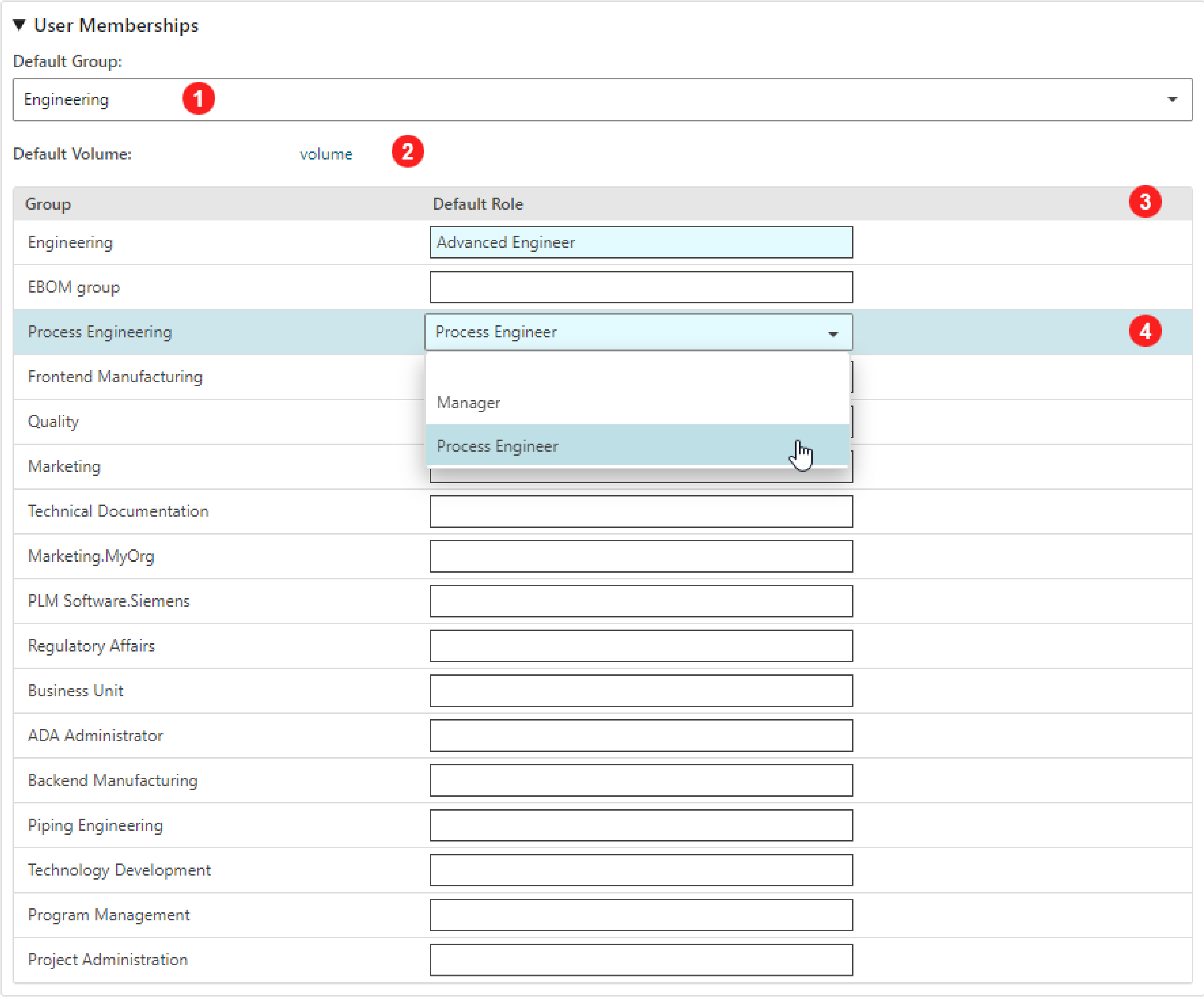
Open your profile for editing

1. On the global header, click your profile icon and select **Manage Profile**.

   Your user profile page displays.

2. Select the **Overview** tab if it is not already selected.

3. On the primary toolbar, select **More commands** ••• > **Edit** > **Start Edit** .



Set your default group

You can set your default group, your default role in each group, and your default volume.

In the **User Memberships** section, select your default group from the **Default Group** list (1). Once the defaults are set, you can quickly switch your current group and role in the pop-up options that display when you click your profile icon

Set your default volume

In the **User Memberships**section, select your default volume from the **Default Volume** list (2).

If you are only assigned one volume, the list is disabled and you cannot select another volume.

Set your default group roles

The **User Memberships** section displays a table of groups and roles (3) where you can set your default role for each group. The **Group** column values are static. The **Default Role** column provides a list of roles for each group.

Set your default role for a group by clicking in the **Default Role** column (4) on the group's row and selecting a role from the list. You can leave the **Default Role** empty for groups where you have no role.

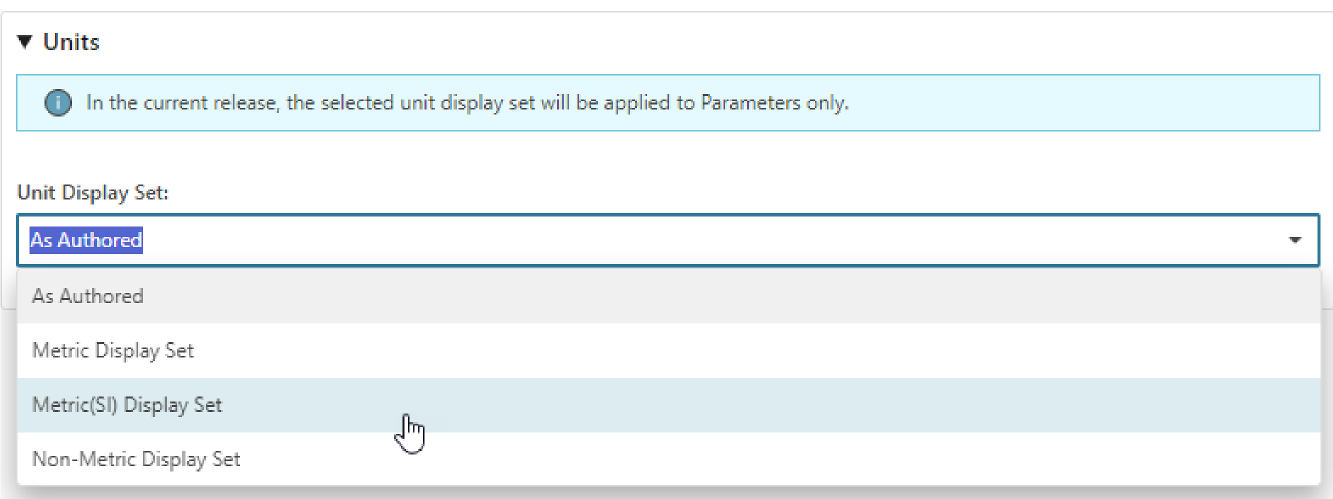
Set your default units

The **Units** section displays your current **Unit Display Set**. This defines the unit of measure displayed for various types of data such as **Parameters**. If the unit of measure defined by the data author differs from the set you choose, displayed data is converted to the unit of measure you select here. If you want to use a different set, select it in the list.

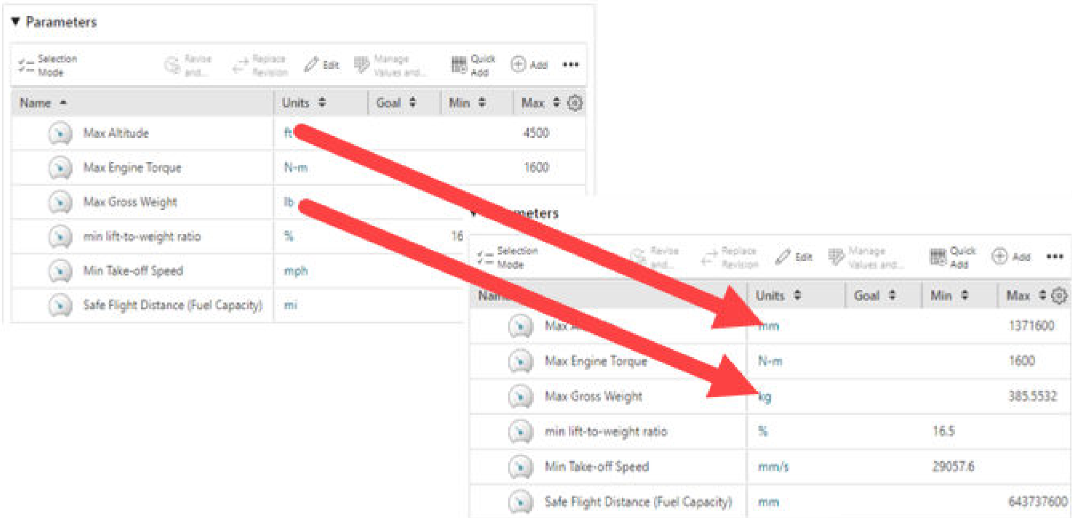
New unit display sets can be configured as needed. The default Unit Display Set options are as follows:

- As Authored - This set contains units created by the author of the data.
- Metric Display Set - This set contains metric units, such as meter and kilogram.
- Metric(SI) Display Set - This set contains metric units, such as meter, kilogram, second, ampere, kelvin, candela, and mole.
- Non-Metric Display Set - This set contains non-metric units, such as foot and pound.

This graphic shows an example of a user updating the unit display set from *As Authored* to *Metric Display Set.*



This graphic shows the results of a user updating the user profile to the Metric Display Set.



Note:

This functionality is only available in Parameter Management for Teamcenter 2406.

Upload a profile picture

You can upload an image file from your computer to appear in the profile icon in the global header when you are logged in, and to other users in various contexts. It is not necessary for the page to be in edit mode.

1. In the Picture section, click **Add Profile Picture**.
2. In the **Add Profile Picture** panel either...
   - Click **Choose File** and select an image file on your computer, or...
   - Drag an image file from your computer's file explorer to the **Upload** box.
3. Click **Update Profile Picture**.

Save your settings

When you are finished, select **More commands** ••• >**Edit** > **Save Edits**.

Change your password

When the Teamcenter installation is configured to use Security Services, passwords are managed by an external identity service provider such as lightweight directory access protocol (LDAP) rather than by Teamcenter. In this circumstance, you cannot change your password yourself using any Teamcenter client. If passwords *are* managed by Teamcenter, you can follow these steps to change your password.

1. On the global header, click your profile icon and select **Manage Profile**.

   Your user profile page displays.

2. On the primary toolbar, select **More commands** ••• > **Manage** > **Change Password** .

3. In the **Change Password** panel, type your current password.

4. Type your new password.

5. Type your new password again in the **Confirm New Password** box.

   The **Change** button displays when all three fields are populated with valid values.

6. Click **Change**.

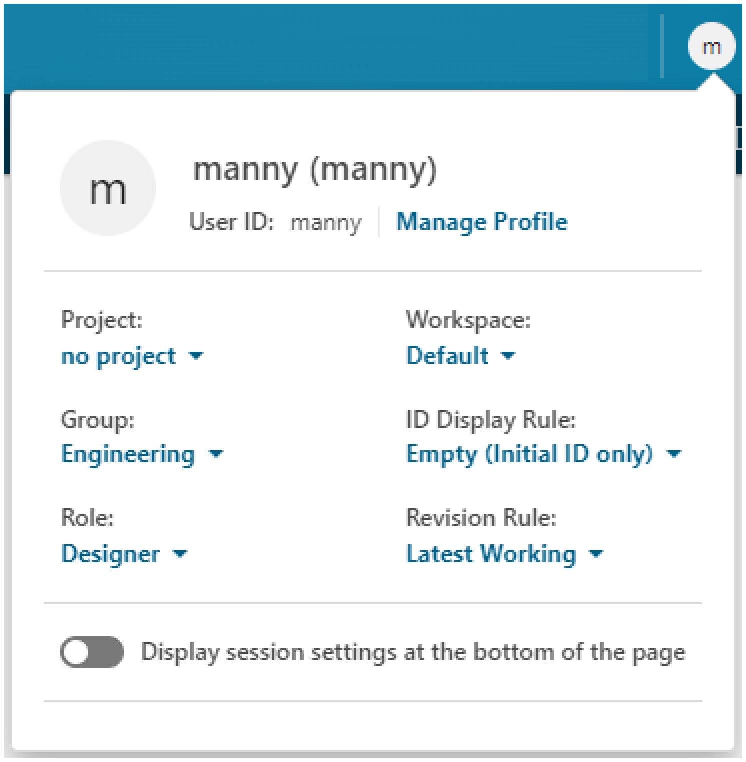
Change your group, role, or project for your session

As you work, you may need to change your current group, role or project. For example, you might need to switch your group from Manufacturing to Engineering to accomplish some task.

1. Click your profile icon.

2. Select your existing project, group, or role.

   > Note:
   >
   > Although your account may not be configured to display a project, you can view your projects and your project team by selecting the **PROJECTS** tile on the home page.



> Tip:
>
> You can toggle the option to display your session settings on any page by enabling **Display session settings at the bottom of the page**.

3. From the list of available options, select the one you want.

> Example:
>
> In your current session, if you change your current group from Manufacturing to Engineering, your role is set to the default role specified for the Engineering group. If no default role is specified, then the first role in the list is used.

> Note:
>
> Your selected group and role are set for your current session only; the default values for your group and role are not updated.
>
> You can manage your default group and role values on your user profile page (global header > profile icon > **Manage Profile**).

Select your geography

You should set your declared geographic location in your profile. This is especially important if some data is restricted to certain geographic areas.

1. On the global header, click your profile icon and select **Manage Profile**.

   Your user profile page displays.

2. On the primary toolbar, select **More commands** ••• > **Edit** > **Start Edit**.

3. In the **LOCATION** section, select your declared geography from the **User Declared Geography** list.

   The values are case sensitive.

4. On the primary toolbar, select **More commands** ••• > **Edit** > **Save Edits**.

   Tip:

   You can cancel pending changes from the **Edit** menu.

Set or change your company location assignment

If your administrator has created and assigned company locations, you can set, clear, or change your company location assignment.

1. On the global header, click your profile icon and select **Manage Profile**.

   Your user profile page displays.

2. On the primary toolbar, select **More commands** ••• > **Manage** > **Location Code**.

   The **Location Code** panel displays.

3. Type your location in the **Available Locations** box to filter and find your location code.

   Note:

   The associated location code may contain the filtered string. For example, "Mi" is contained in the location code, Milwaukee, associated with Wisconsin. It is also contained in the location code, Milford, associated with Ohio.

   Tip:

   To set your location to a value not in this list, type the location you want to assign to yourself in the **Location Code** box. The following message is displayed:

```
Location Code "zzz" does not exist for any Company Location.
Do you want to set a new location with that code?
```

Click **Set**.

4. Select a location and click **Set**.

Change location on parts and documents

When you create a new part or a document, your company location appears as a value in the **Current Location Code** box on that part or document. If your system configuration allows, you can change the location code to another existing code.

Change your revision display

A *revision* is a unique, specific iteration of a previously created object such as a part, an assembly, or a document.

- A revision can have associated CAD models, drawings, or specifications that are applicable only to that revision.
- Revision display is controlled by *revision rules*.

  For example, **Latest Working** is a standard default revision rule for design engineers, while a manufacturing engineer may prefer to use the **Latest Released** revision rule.
- Revision rules are configured by administrators to specify which revisions of parts and assemblies display.
- Revision rules determine how items and item revisions display in tables, and what happens when you copy and paste an item revision into a table. For more information, see **How dynamic item revisions work in folders, item relations, and paste actions**.

Multiple revisions of an object can clutter your display. You can select the rule that best meets your needs.

1. On the global header, click your profile icon.

   A pop-up containing **session settings** displays.
2. Click the current **Revision Rule** and then select the desired rule from the list.

Create and change ID display rules

Identifier (ID) display rules let you select the context in which items and item revisions are displayed for you. If no rule is applied, the initial identifier attribute is displayed.

Create an ID display rule

You can create a custom ID display rule to display objects with alternate IDs for a specified ID context.

1. From the **Home Page**, click the **ID DISPLAY RULES** tile.

   The **ID Display Rule** page opens and displays any existing rules.

2. Click **More Commands** ••• > **New** > **Create ID Display Rule** ⊕.

   The **Create ID Display Rule** panel opens.

3. Enter a **Name** for the rule and then select the rule **Contexts** from the list.

4. (Optional) Click **Use As Default** to set the new rule as the default ID display rule.

5. (Optional) Click **Set As Current** to set the new rule as your current display rule after it's created.

6. Click **Create** to create the new display rule. The new rule now appears on your **ID Display Rule** page.

Change your ID display rule

When you have created alternate IDs for objects, you can change your **ID Display Rule** to display these custom IDs in your bill of materials instead of the default value for the revision object.

1. Click your profile icon to display your **session settings**.

   > Tip:
   >
   > You can optionally display the **session settings** as a bar at the bottom of the browser window to always keep it visible. This is helpful if you need to cycle through many ID display or revision rules.

2. Click the down arrow next to **ID Display Rule** and then select the rule you want to apply.

> Note:
>
> The available ID display rules are based on the alternate ID context configured by your administrator.

Your alternate IDs now display for the revision object.

View ID display rule information

You can quickly view information on an ID display rule when viewing it from a list of your existing rules.

1. Click your profile icon to display your user properties.

2. Click the down arrow next to **ID Display Rule**.

3. Instead of selecting a rule, hover over it and then click the **Information** icon ⓘ.

   The **ID Display Rule** page opens and displays the details on the rule.

Change your data privacy options

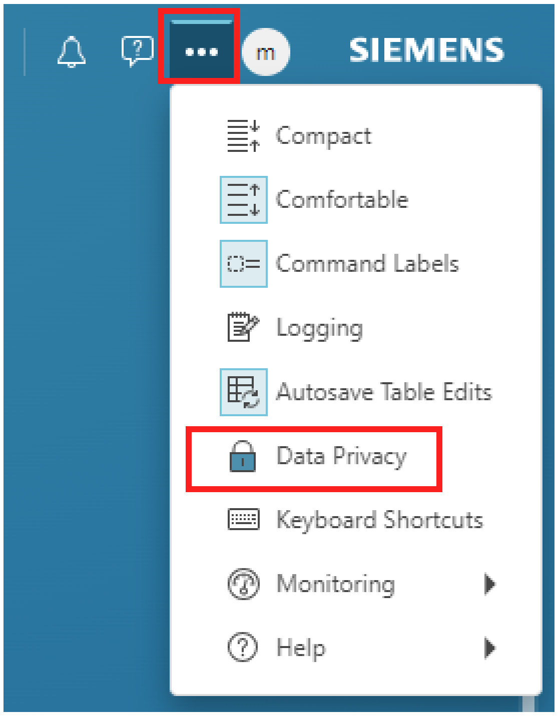
Siemens Digital Industries Software collects information about the use of Active Workspace by its users. The information on these policies is displayed on the **Data Privacy** tab of your user profile. You can choose to **Agree** to share your information, or **Decline** to opt out.

- The **Digital Product Experience** program collects and uses user data to provide a personalized user experience.

- The **Product Excellence Program** collects and uses user data to improve product features and functionality to better meet customers' needs.

You can click the link to the **Siemens Trust Center** from the program details to view detailed information on how the programs work and what data is sent to Siemens. A link to the **Siemens Digital Industries Software Data Privacy Notice** is also provided on the page.

1. Click **Settings** ••• to expand the settings menu.



2. Click **Data Privacy** from the menu.

   The **Data Privacy** tab of your user profile is displayed.

3. Review the information for the selected programs, and then select **Agree** or **Decline**.

   > Tip:
   >
   > Changes you make take effect the next time you log on to Active Workspace.

Viewing access rights

If your administrator has enabled the **Access** tab and granted you access, you can view access rights on a selected object by clicking the **Access** tab.

The tab contains three sections.

Access rights context	Filters for user, group, role and project define the context in which user rights to the currently selected object are evaluated. Initially, the filters are set for the current user session context. You (and those users who have been granted permission by means of BMIDE conditions) can use the lists to select another combination of user, group, role and project for which you want to view the associated access rights for the currently selected object.

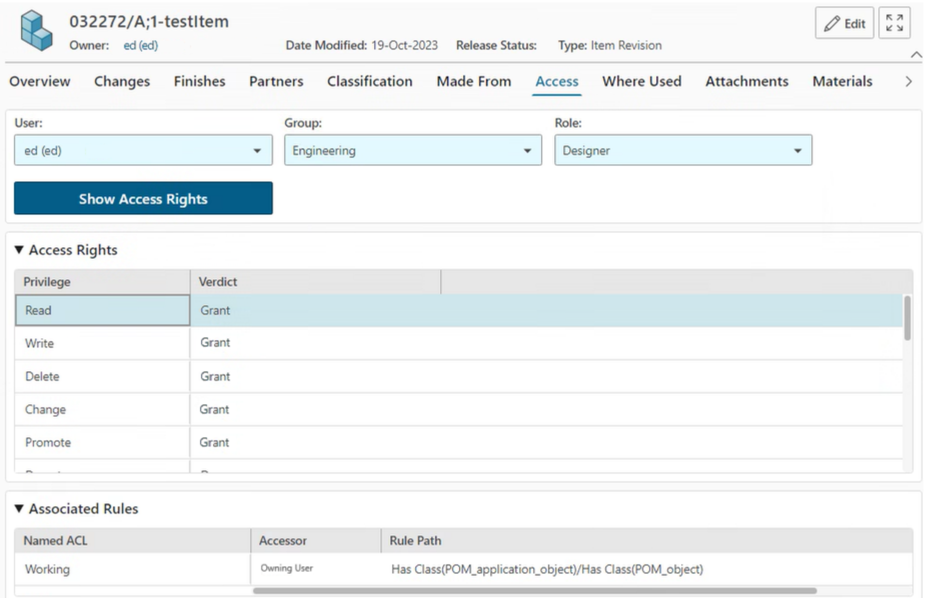
Changes to these lists are applied when you click **Show Access Rights**.

ACCESS RIGHTS Lists the operations granted to the filtered combination of user, group, role and project.

ASSOCIATED RULES Lists the rules associated with the given object and selected operation.

Example:

In this example, user Ed can view his access rights and associated rules for his role as designer in the Engineering group working on a motor shaft. Here Ed can see what rule grants him copy privileges for item revisions on which he is working.



Autosave table edits

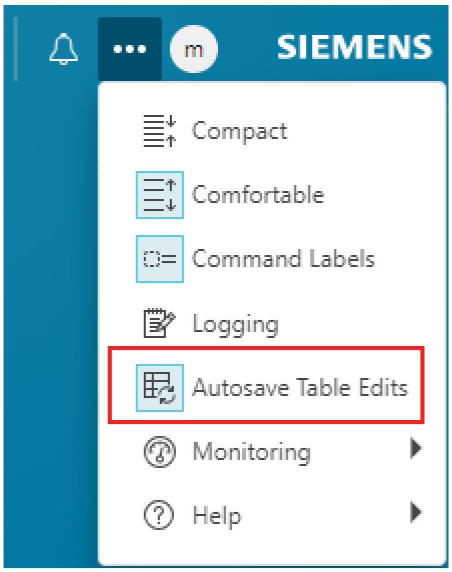
You can select the option to automatically save changes made to tables. When this option is enabled and you edit a table cell by double-clicking it, the changes made to the cell are automatically saved when you click off the cell.

- If you edit a table with autosave off, you must save the changes made to the table cells by clicking **Save Edits**.
- Some table cells may not support autosave. You must manually save changes made to these table cells.
- Some tables may only support autosave editing. In this case, changes made to the cells are automatically saved, even if you have autosave turned off in your profile.

- If you enable **Autosave Tables** while you have unsaved table edits, the system prompts you to **Save** or **Discard** the table edits before enabling autosave.

1. In the global header Session controls, click **Settings** •••.

2. Click **Autosave Tables** to turn on auto saving of changes made to table cells.

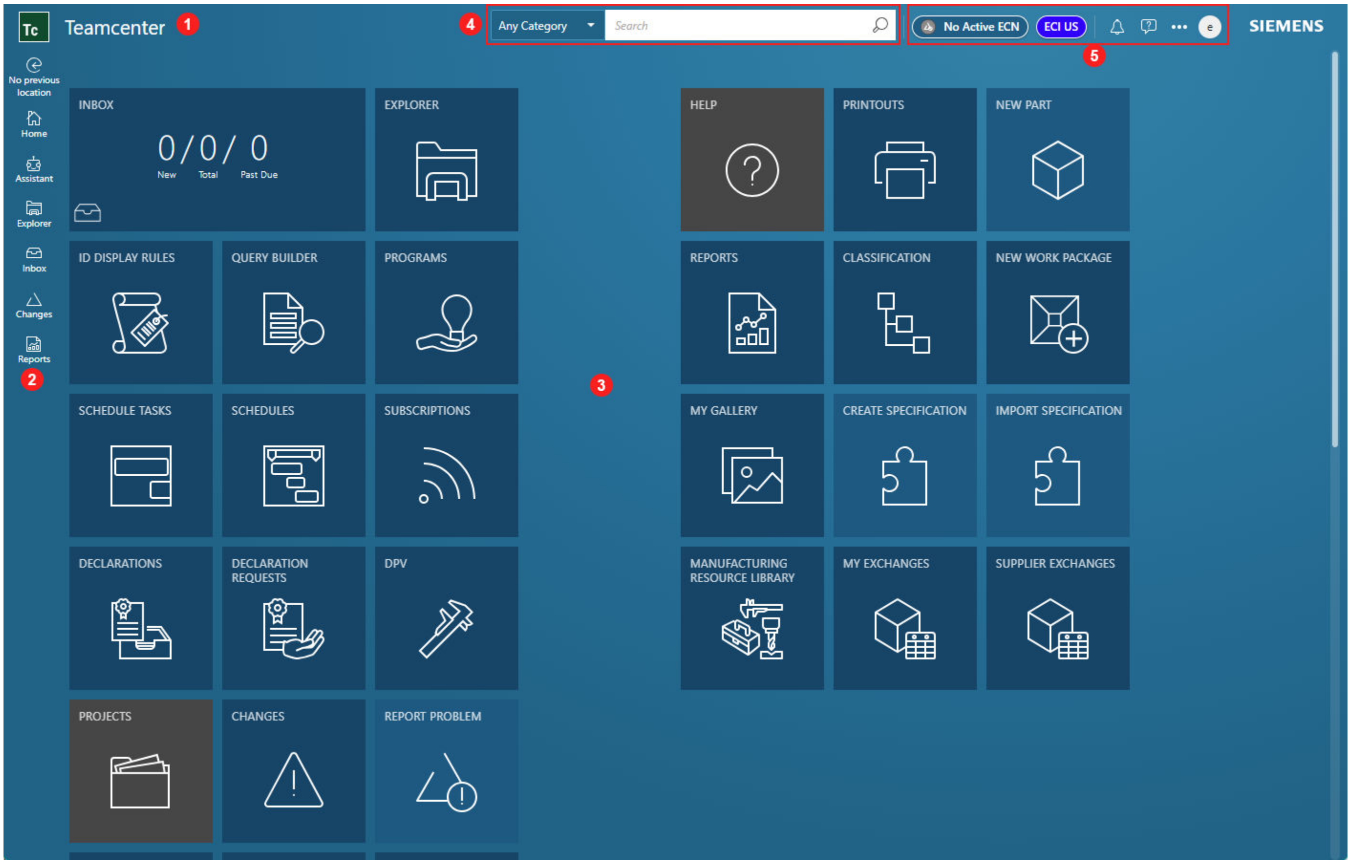


> Note:
>
> **Autosave Tables** is enabled for all users by default.

Page layouts and navigation

Home page

Your home page contains tiles and toolbars that run commands enabling you perform tasks and access data. Examples include exploring your folders, viewing schedules, opening your Inbox, accessing help documents, and running reports. Your administrator configures the home page based on your role. This allows the home page to be customized for easier and faster navigation, placing your most frequently-used commands on your home page.



1 Global header: On the home page, the header includes the Teamcenter location, global search (4), and session controls (5).

2 Global navigation: Your entry point for various features and data access. These commands are always available. Tooltips provide a short description of each command. The icons you see may vary from those shown in the figure, depending on your role and how the page is configured for it. If there is insufficient space to show all available commands due to your screen resolution or the vertical size of the client window, the **More Commands** ••• icon appears in the last icon position. Click it to reveal the hidden commands in a pop-up menu.

The **Home** icon opens your home page.

3 Tiles: These provide access to commonly-needed features and data. The tiles on your home page may differ from the figure based on your specific configuration. Some commands may be present in both global navigation and a tile. You can move and resize tiles to suit your needs. You can pin and unpin tiles, and pin objects to your home page as tiles.

4 Global search: Search for data objects in your Teamcenter system. You can access saved searches and the **Advanced Search** feature from here.

5 Session controls:

- Change notifications: View and search active changes, if any, and set the active change context.

- Environment indicator: In infrastructure that has multiple deployments or deployment types — test and development, for example — an administrator can optionally configure and enable this chip to show which environment you are currently using.

- **Alerts** : Notifications of specific items that have changed. Also notifies you when a background process completes. If there are many alerts you can search the list.

- Teamcenter AI Chat : Teamcenter Artificial Intelligence (AI) Chat allows you to ask questions and provides summarized answers with source materials from indexed and embedded file contents to which you have access. Appears only if configured by an administrator.

- **Settings** •••:

  - Choose **Compact** or **Comfortable** display format.

  - Show or hide text labels for commands in global navigation.

  - Access logging options and record a log file to share with an administrator.

  - Toggle automatic saving of table edits.

  - Assess system performance with **Monitoring**.

  - View online help.

- The icon shown here is a default image. If the current user has added a profile picture it appears in the circle at the bottom of navigation. Otherwise the first letter of the user name appears there.

  > Note:
  >
  > If there is insufficient space to show all of the bottom-position icons due to your screen resolution or the vertical size of the client window, an ellipsis (...) appears in the last icon position. Clicking it reveals the hidden icons.

  Profile: Open your user profile page, view and change your session settings, toggle display of session settings at the bottom of the page, and sign out of Active Workspace.

  Session settings include: **Project**, **Group**, **Role**, **Workspace**, **ID Display Rule** and **Revision Rule**.

  > Tip:
  >
  > If you have uploaded a profile picture to your user profile, a thumbnail of it displays in the global header. Otherwise a default graphic displays.

Related topics

Arrange tiles

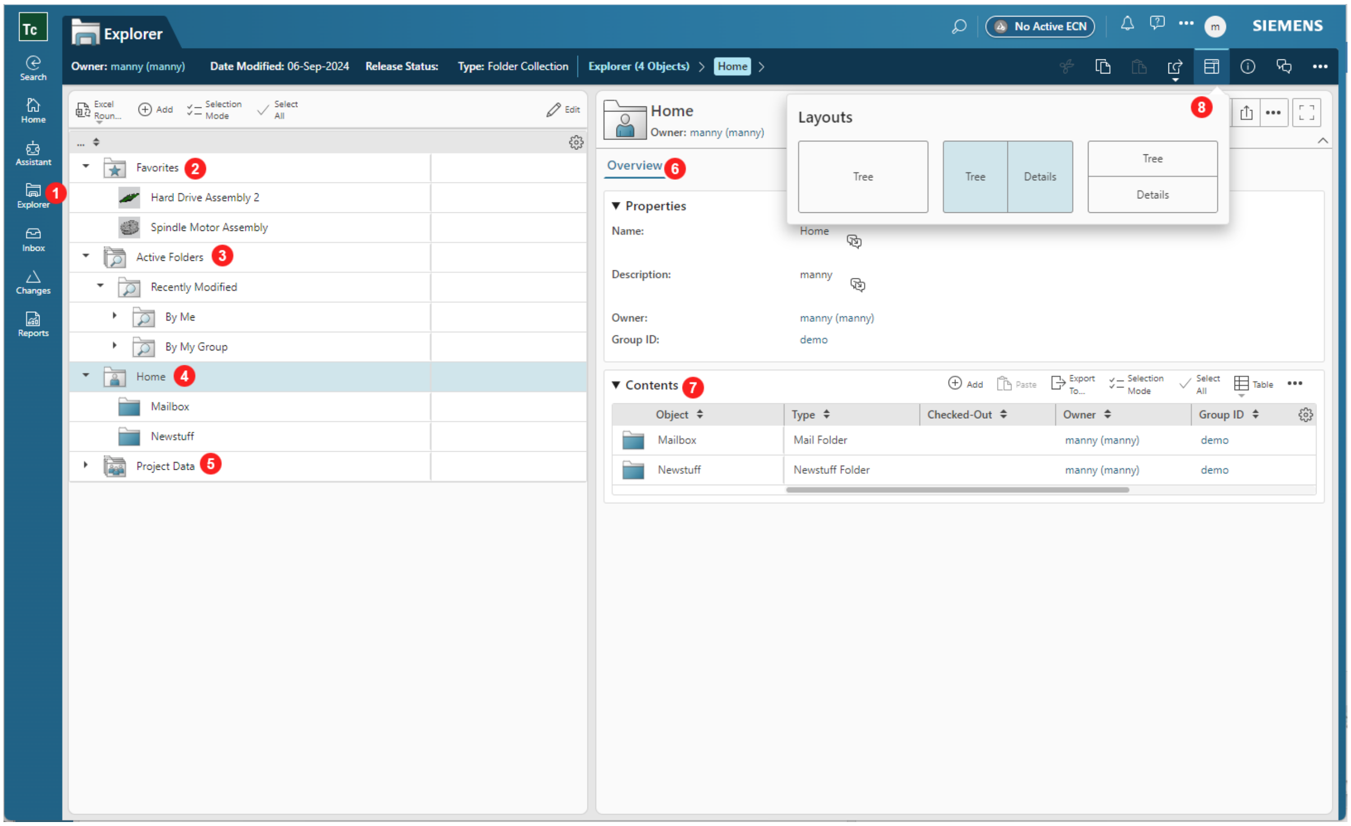
Resize a tile

Pin an object to the home page

Unpin a tile from the home page

Explorer

The **EXPLORER** tile on the **Home** page, and the **Explorer** icon in global navigation open a tree view that provides access to all your folders, their subfolders, and data in folders from a single entry point.



1 Command in navigation that opens the **Explorer** page.

2 **Favorites** - Always first in the tree regardless of sorting applied to the tree. Contains references to objects that you have saved as favorites for quick access.

3 **Active Folders** - Collects all of the active folders that you can access. Active folders are saved search criteria that return the latest available matching results.

4 **Home**. Your personal home folder. Selected by default, with relevant commands enabled on the toolbar when you open **Explorer**. Content varies for each user. In general, it displays references to objects and information that are relevant to your work.

5 **Project Data** - Displays the projects of which you are a member and enables you to view the content of a selected project.

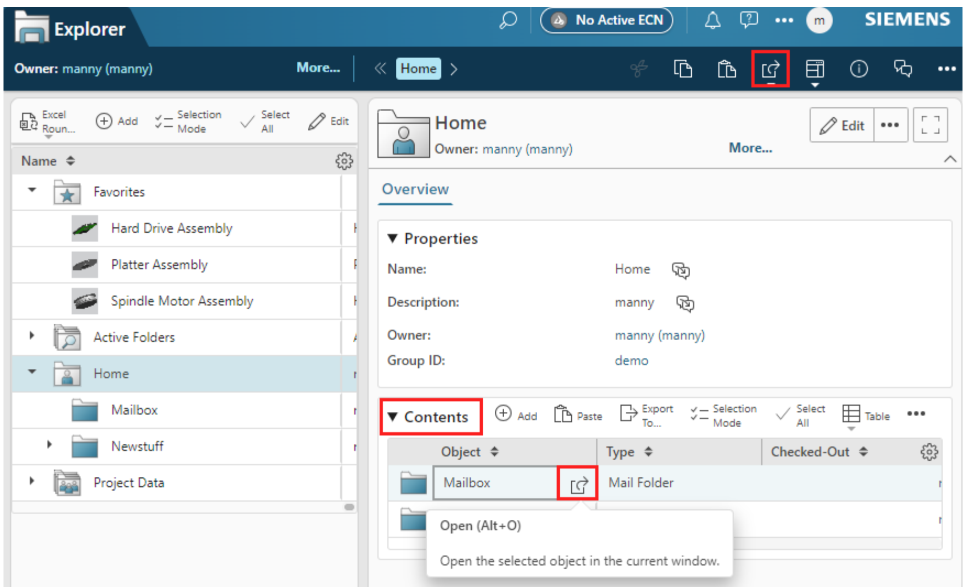
6 Overview of the properties of the selected folder.

7 Content in the selected folder. **Home** and **Favorites** can display any object in the system. **Active Folders** and **Project Data** are query folders that display referenced objects matching the search criteria.

Note that the **Contents** section is not present when the **Project Data** folder is selected.

8 **Layout Manager** - enables rearranging of the panes in the page to your preferred view.

Open folders in the tree by selecting them and clicking **Open** on the primary toolbar. You can also open subfolders from the table displayed in the **Contents** section by hovering over a folder in the **Object** column and clicking **Open**.



Related topics

Organize searches with active folders

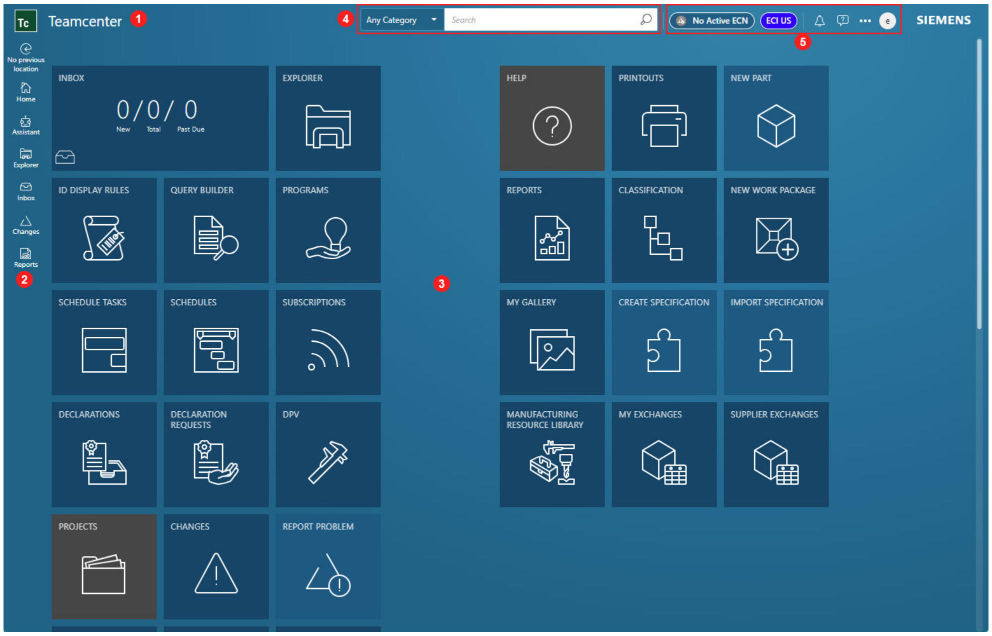
Introduction to objects and object types

Using projects

Page layouts

Different pages in Active Workspace have varying layouts of the main page components. This topic presents a few of the main page layouts to help you understand them and the terms you will find used in documentation.

Home page layout

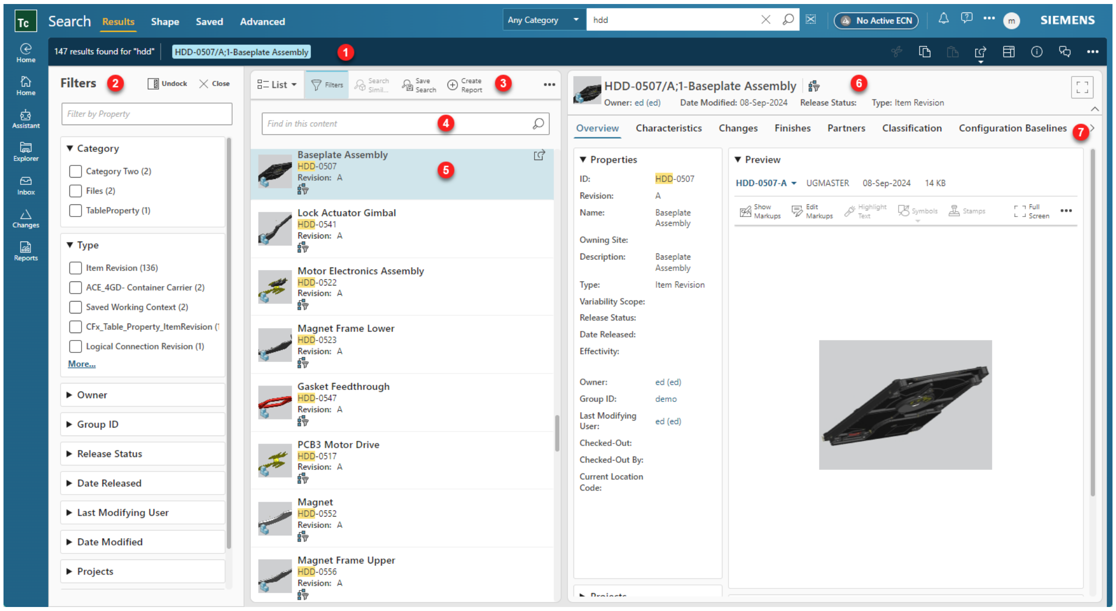


1	Global header
2	Global navigation
3	Work area and tiles
4	Global search
5	Session controls

For a more in-depth information see the **Home page** topic.

Search page layout

The results page displays the objects matching the criteria entered in Global search.



1 Results panel toolbar

Shows a count of found objects, the search scope, and any applied filters. Also contains the primary toolbar with commands applicable to the context.

2 Filters panel

Enables you to narrow the search results. When closed you can reopen it by clicking **Filters** .

3 Results panel toolbar

Commands applicable to the search results displayed in the results panel.

4 In-context search

Search the list of found objects in the results panel (5).

5 Results panel

Lists the objects matching the search criteria entered in Global search.

6 Object information

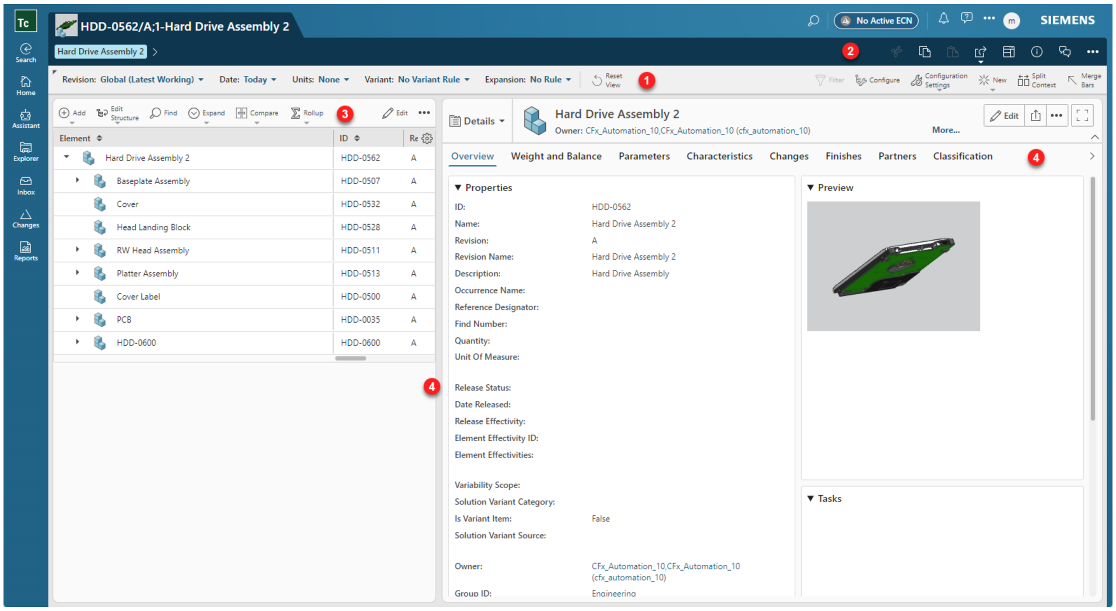
Displays information about the object currently selected in the results panel (5) and enables you to open edit it.

7 Tabs

Provide access to different categories of information about the object selected in the results panel (5).

Object page layout

This page displays when you open an object.



1 Object information and options

Enables viewing and selection of revision, revision date, group and variant rule.

2 Primary toolbar

Contains commands applicable in the context.

3 Work area toolbar

Contains commands applicable to the object.

4 Work area

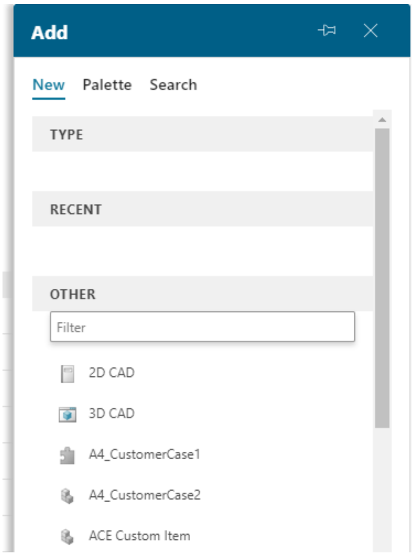
The area not occupied by Global navigation and the Global header. Some of the content can vary depending on the type of object you have opened.

5 Tabs

Provide access to different categories of information about the selected object.

Task panels

Some commands open a task panel. Typically, these panels display over the top of the information in the work area. Examples include **Add** panel, **Create Change** panel, and **Trace Link** panel.

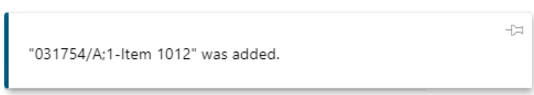


Other commands, such as search **Filters**, display a panel on the left.

Notification and error messages

The system displays notification messages. You can pin a message so that it continues to appear in the window, and you can refer to the message text later during your work session.

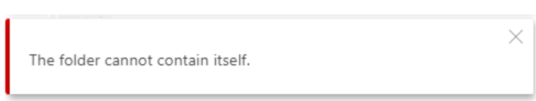
Example:



Navigating to a new location or selecting a new object, such as a physical part or a file, does not dismiss the message. You must unpin the message to dismiss it.

The system also displays error messages. These cannot be pinned.

Example:



Move and resize panels

As you work with data objects, you may open panels to perform your task. Some panels, such as the **Information** panel, can be undocked and moved around the browser window. When undocked hey can also be resized.

When you re-dock a panel to return it to its default location, the next time you undock the panel, it returns to its last undocked size and position.

Procedure

The following steps show how to undock the **Information** panel. Other panels that can be undocked work in the same way when opened.

1. When viewing an object, click **Information** ⓘ on the primary toolbar.

   The **Information** panel opens.

2. To undock the panel, click **Undock** in the upper-right corner of the panel.

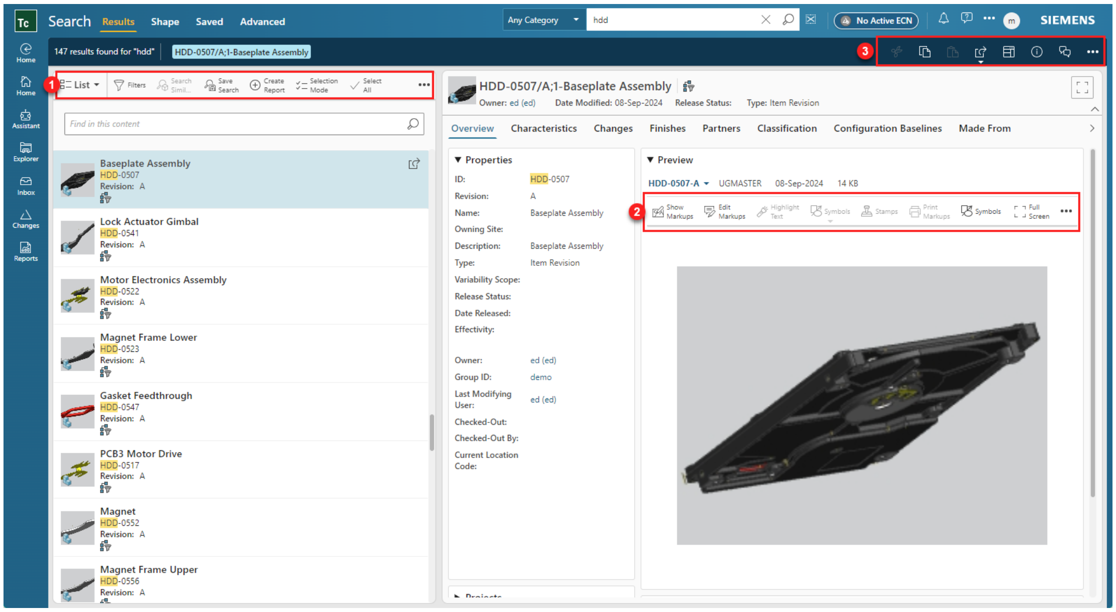
   The panel undocks and can now be moved around the browser window.

3. Do any of the following:

   - To move the panel, place your cursor in the panel header and then click and drag the panel to your desired location in the browser window.
   - To resize the panel horizontally, place your cursor on the right or left edge of the panel and then click and drag to resize it.
   - To resize the panel vertically, place your cursor on the bottom of the panel and then drag to resize it.
   - To resize the entire panel, click the bottom-right corner of the panel and then drag to resize it.
   - To return the panel to its default size and location, click **Dock**.

Toolbars and commands

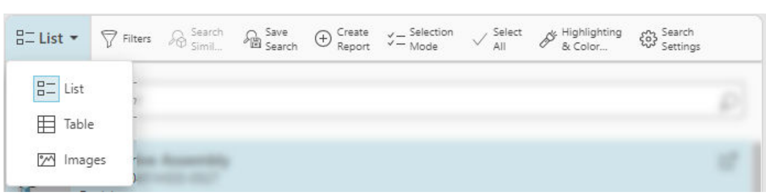
Pages in the user interface may include three different toolbars.



1	Results panel toolbar
2	Work area toolbar
3	Primary toolbar

Results panel toolbar

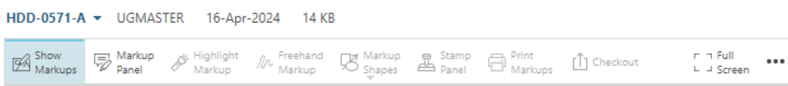
The results panel toolbar includes commands associated with the data displayed in the results area. As the data changes, the commands available in the toolbar change. Some commands are grouped together as a stack of commands under an icon with a small triangle under the command icon.



> Note:
>
> Depending on the size of your browser window and display resolution, the **More Commands** ••• command may display on the results panel toolbars. Clicking the icon displays additional commands that are hidden due to sizing constraints.

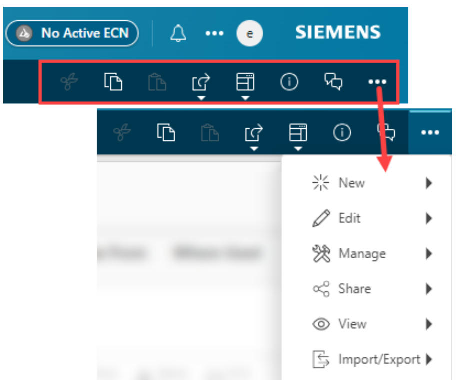
Work area toolbar

The work area toolbar includes commands associated with the data displayed in the work area. As the data changes, the commands available in the toolbar change.



Primary toolbar

The primary toolbar includes commands associated with the data displayed on the page. As the data changes, the commands available in the toolbar change.



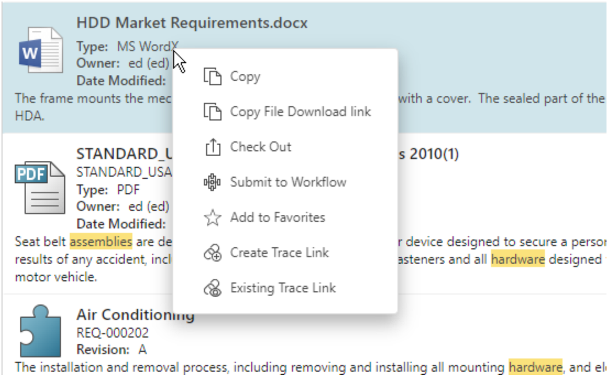
Tip:

If you don't see the command you need, try looking for it in **More Commands •••**.

Command context menus

You can access commands in the context of the items you are working with by right-clicking on the items in a table or a list to access the commands. Depending on the area of the application you are in, the available commands are different. For example, right-clicking on a schedule task gives you a completely different set of in context commands versus clicking on a part in a structure.

The following graphic shows the commands in the context of a document in the search results list.



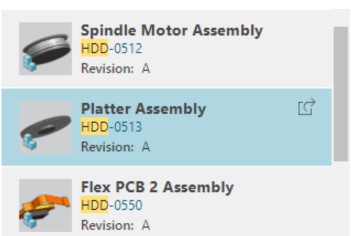
> Note:
>
> Context menus are not available on touch devices.

Selecting single or multiple objects

In Active Workspace you can select objects one at a time or several at once.

Select a single object

To select a single object, click on it. The object highlights to indicate that it is selected.



Select multiple objects

There are two methods to select multiple objects. In both cases, objects are highlighted to indicate selection.

1. You can use **Selection Mode** located in the results panel toolbar.

   Once you click or touch **Selection Mode**, you can:

   - Click or touch any object to select it.
   - Shift-click to select a range of objects.
   - **Select All / Clear Selections**. This is a toggle. Clicking it once selects all displayed objects. Clicking it again, clears the selection on all the displayed objects and exits the multiselect mode.

2. The second method is to click, Shift-click, or Ctrl-click objects without using **Selection Mode**.

   - Click or touch any object to select it. Any previously selected objects are deselected.
   - Ctrl-click nonconsecutive objects to select them.
   - Shift-click to select a range of objects.
   - **Select All / Clear Selections** is not available without using **Selection Mode**.

Note:

In search results, when you select multiple objects using either of the described methods you can see information about them, but you cannot open or download any of the selected objects. You must select a single object to open or download it.

Header information

The Global header is always present. It shows you your current context and provides global search, session information and settings, and access to your user profile. The main components of the Global header are:

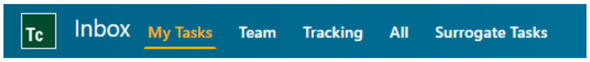
- Location information
- Page links
- Global search
- Session controls

1	Location
2	Global search
3	Session controls

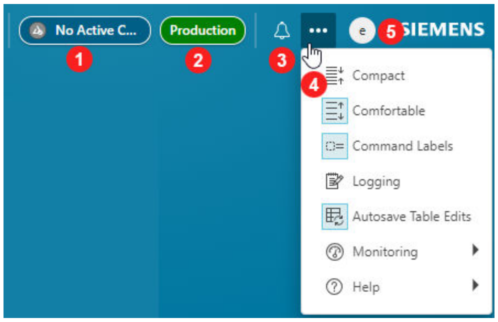
In some locations, the Global header provides links to one or more pages.

Search result pages:

Inbox pages:



Session controls



- (1) Change notifications: View and search active changes, if any, and set the active change context.
- (2) Environment indicator: In infrastructure that has multiple deployments or deployment types — test and development, for example — an administrator can optionally configure and enable this chip to show which environment you are currently using.
- (3) **Alerts** : Notifications of specific items that have changed. Also notifies you when a background process completes. If there are many alerts you can search the list.
- (4) **Settings** •••:
  - Choose **Compact** or **Comfortable** display format.
  - Show or hide text labels for commands in global navigation.
  - Access logging options and record a log file to share with an administrator.
  - Toggle automatic saving of table edits.
  - Assess system performance with **Monitoring**.
  - View online help.
- (5) **Profile**: Open your user profile page, view and change your session settings, toggle display of session settings at the bottom of the page, and sign out of Active Workspace.

  Session settings include: **Project**, **Group**, **Role**, **Workspace**, **ID Display Rule** and **Revision Rule**.

Tip:

If you have uploaded a profile picture to your user profile, a thumbnail of it displays in the global header. Otherwise a default graphic displays.

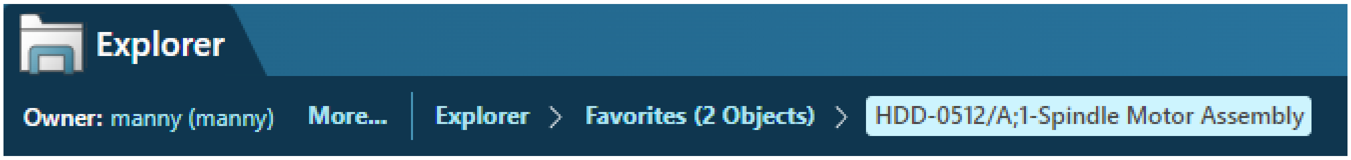
Related topics

Home page

Navigate your workspace using breadcrumbs

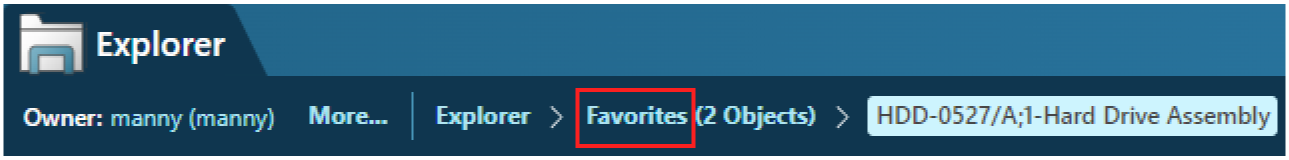
Navigate your workspace using breadcrumbs

Locations can have a breadcrumb showing where you are within a folder structure or a part structure in **Explorer**. Breadcrumbs mainly serve to show your current context, but you can also use them to navigate the structure.

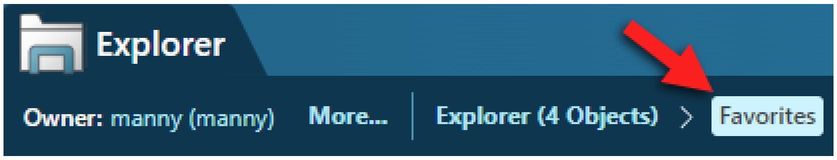


Move to a different folder location

Click the folder name.

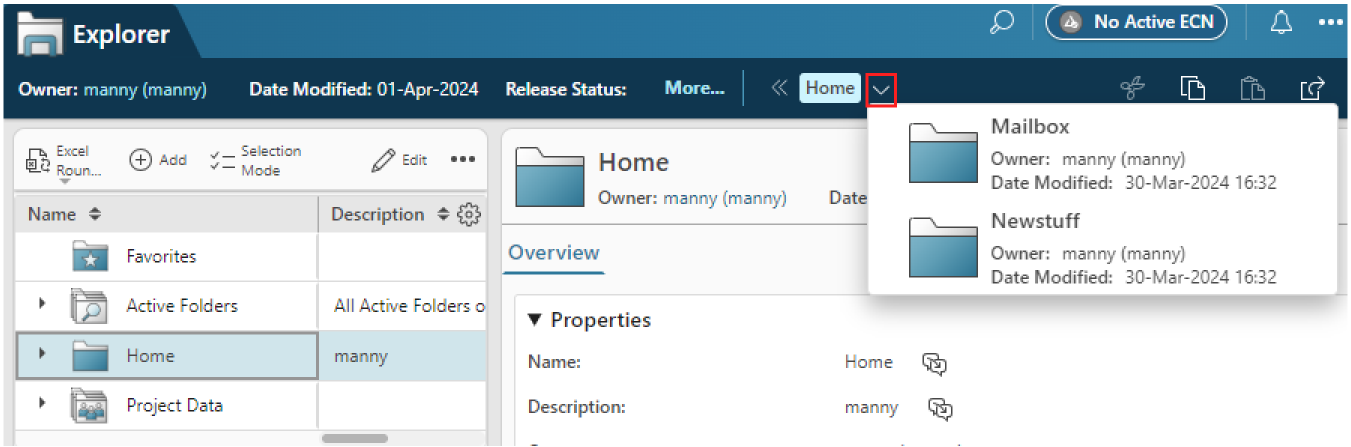


You move to the selected folder location.



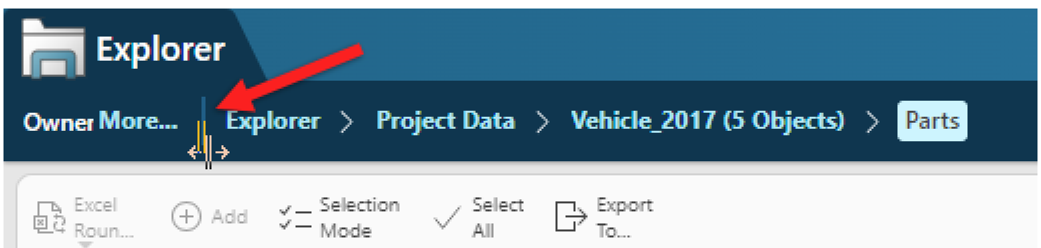
Move to a different branch within a selected folder

Click the chevron 〉 to display the child folders of a currently-selected folder in a drop-down list. Select a folder in the list to navigate to it in **Explorer**.

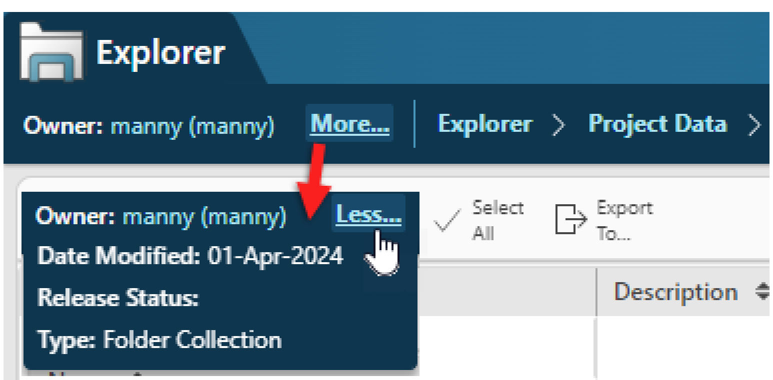


Expand or shrink breadcrumbs area

You can expand or shrink the header area preceding the breadcrumbs. Drag the separator just before the first breadcrumb to shrink or expand the space before the breadcrumbs area.



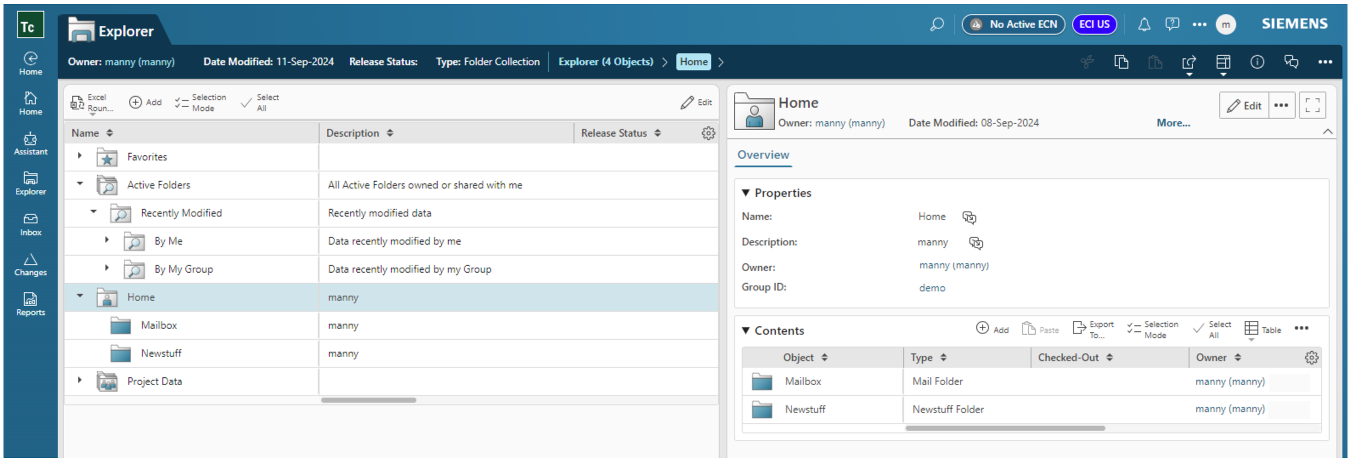
Items preceding the breadcrumbs become hidden and appear when you click **More...**



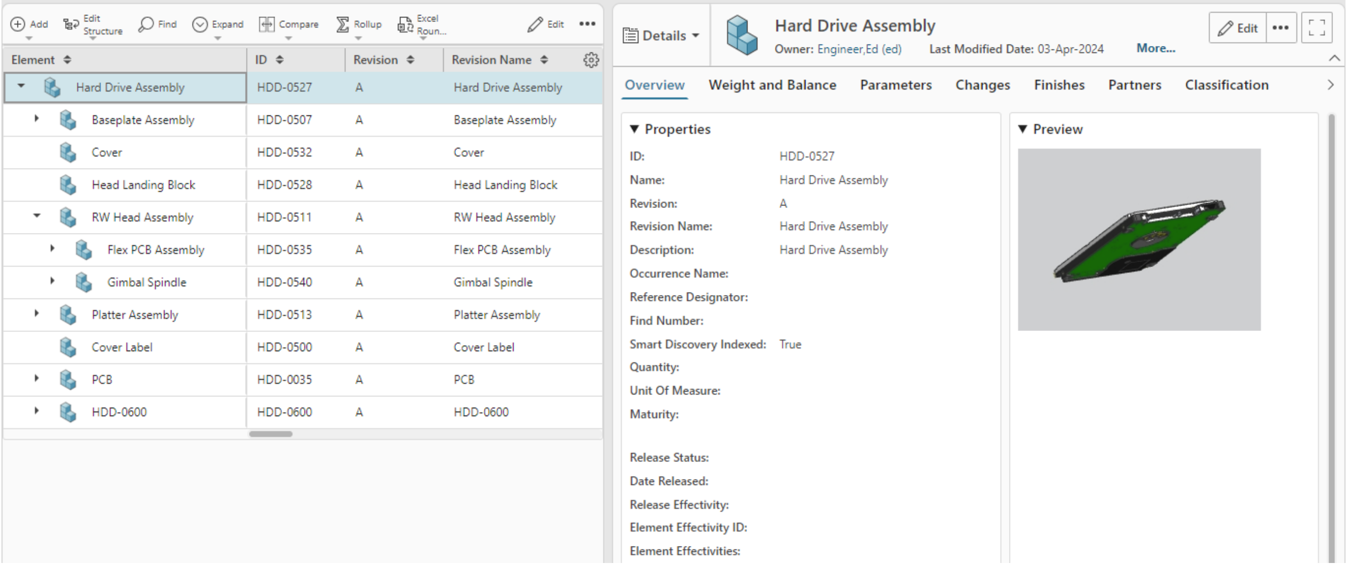
Viewing data

View folders and object structures

When folders are opened in the **Explorer**, they are displayed in a tree view that shows all elements of the folders in a parent-child relationship. You can expand or collapse the nodes in the tree as needed.



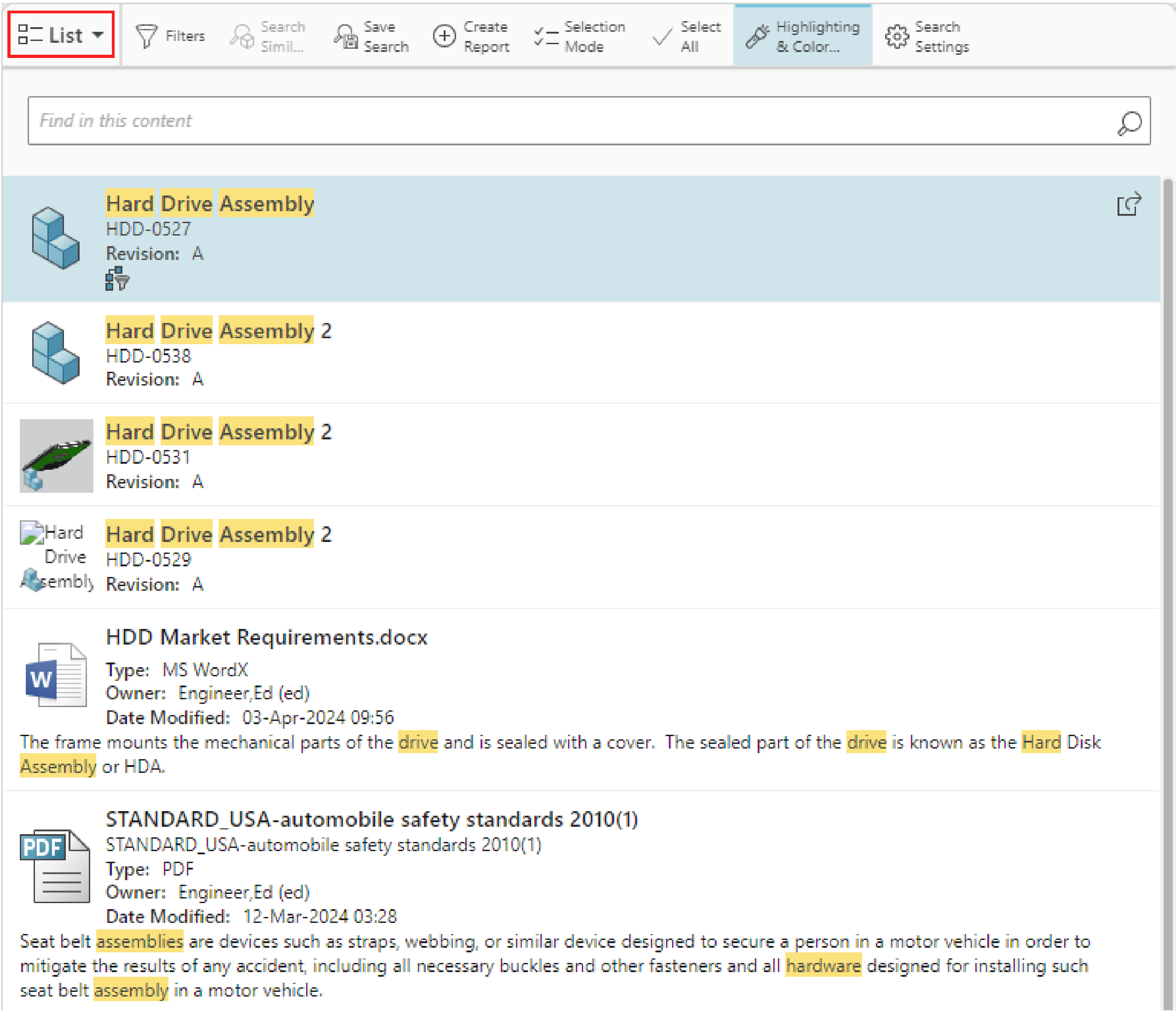
In a tree view, when you select a structure, an object within a structure, or a folder, its details are displayed in the adjoining work area.

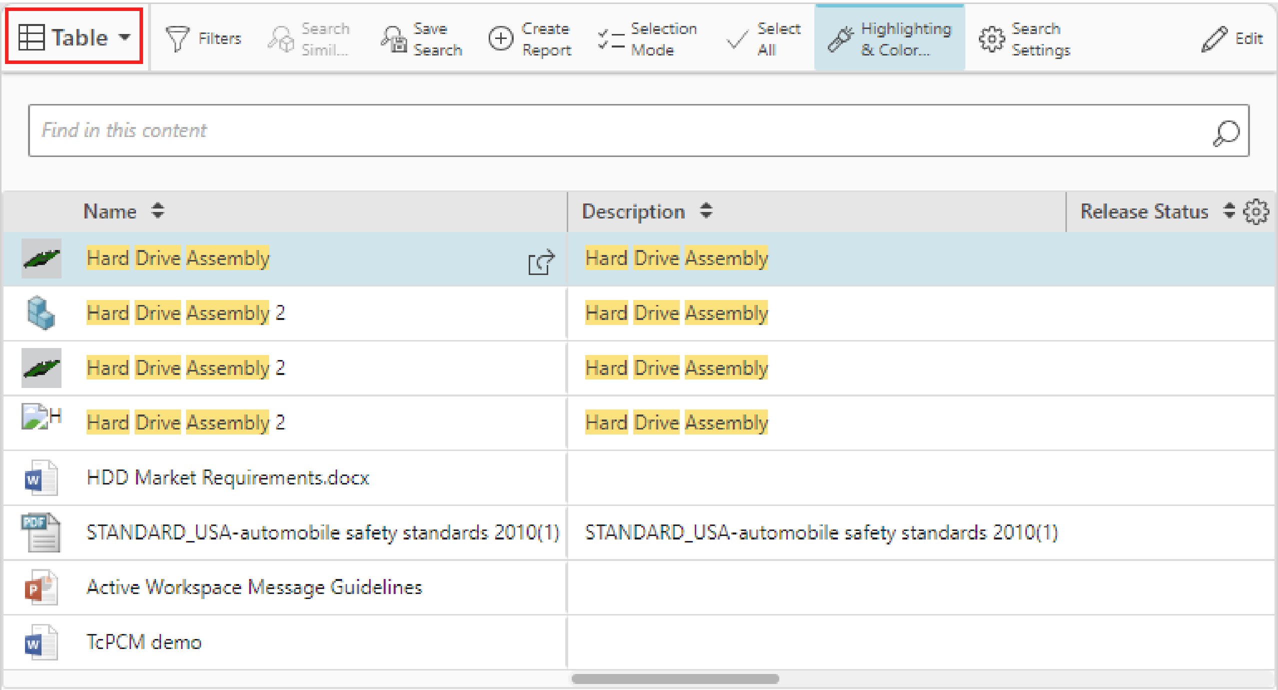


List, Table, Image and Tree views

In **Search** results, **Inbox**, **Changes,** and opened **Folders** you can view the displayed objects as a list, a table, or a collection of images. You can edit some data in the **Table** view.

The list and table of objects in search results appear as follows, respectively.

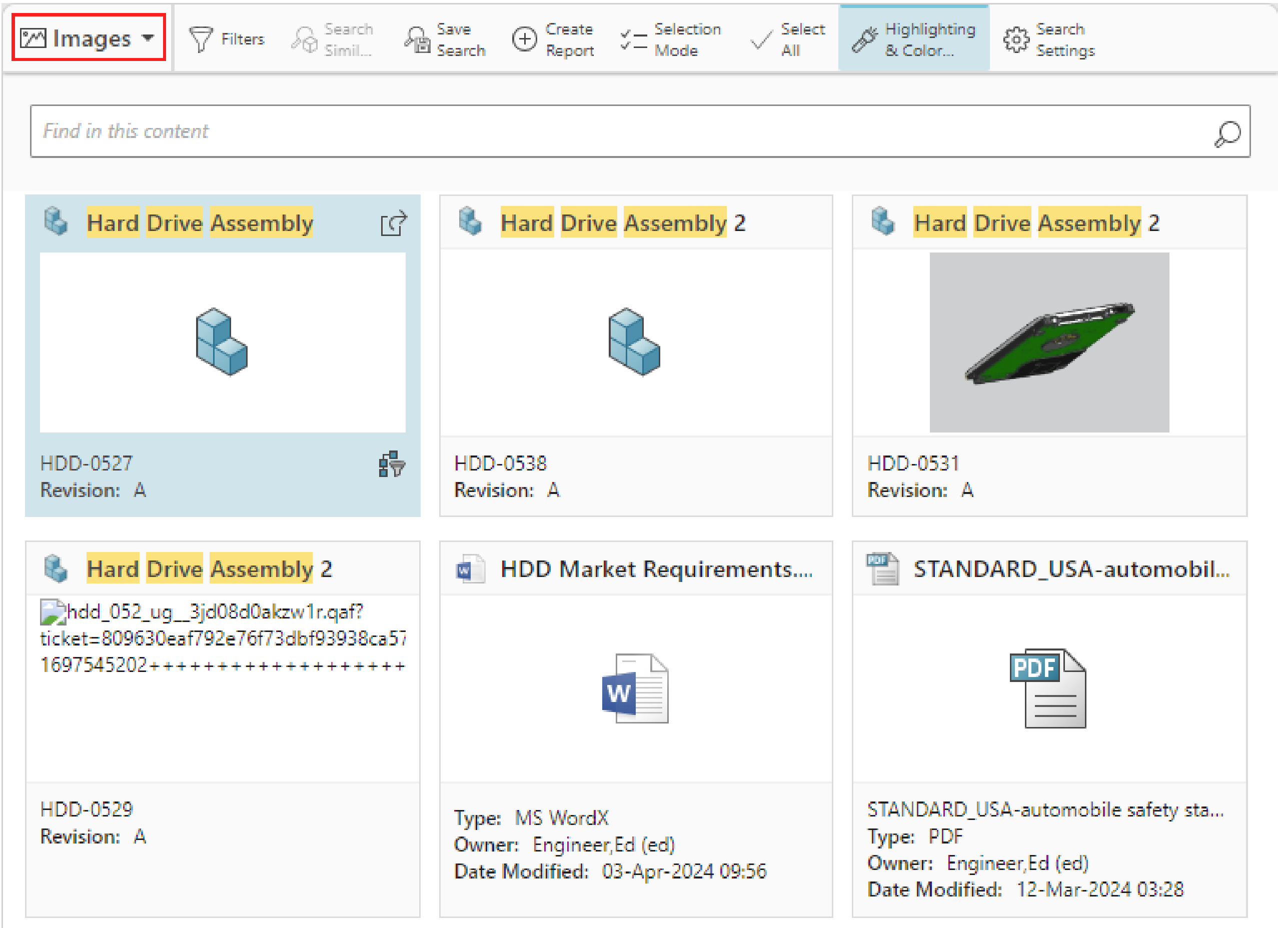

List
Filters
Search Simil...
Save Search
Create Report
Selection Mode
Select All
Highlighting & Color...
Search Settings
Find in this content
Hard Drive Assembly
HDD-0527
Revision: A
Hard Drive Assembly 2
HDD-0538
Revision: A
Hard Drive Assembly 2
HDD-0531
Revision: A
Hard Drive Assembly 2
HDD-0529
Revision: A
HDD Market Requirements.docx
Type: MS WordX
Owner: Engineer,Ed (ed)
Date Modified: 03-Apr-2024 09:56
The frame mounts the mechanical parts of the drive and is sealed with a cover. The sealed part of the drive is known as the Hard Disk Assembly or HDA.
STANDARD_USA-automobile safety standards 2010(1)
STANDARD_USA-automobile safety standards 2010(1)
Type: PDF
Owner: Engineer,Ed (ed)
Date Modified: 12-Mar-2024 03:28
Seat belt assemblies are devices such as straps, webbing, or similar device designed to secure a person in a motor vehicle in order to mitigate the results of any accident, including all necessary buckles and other fasteners and all hardware designed for installing such seat belt assembly in a motor vehicle.



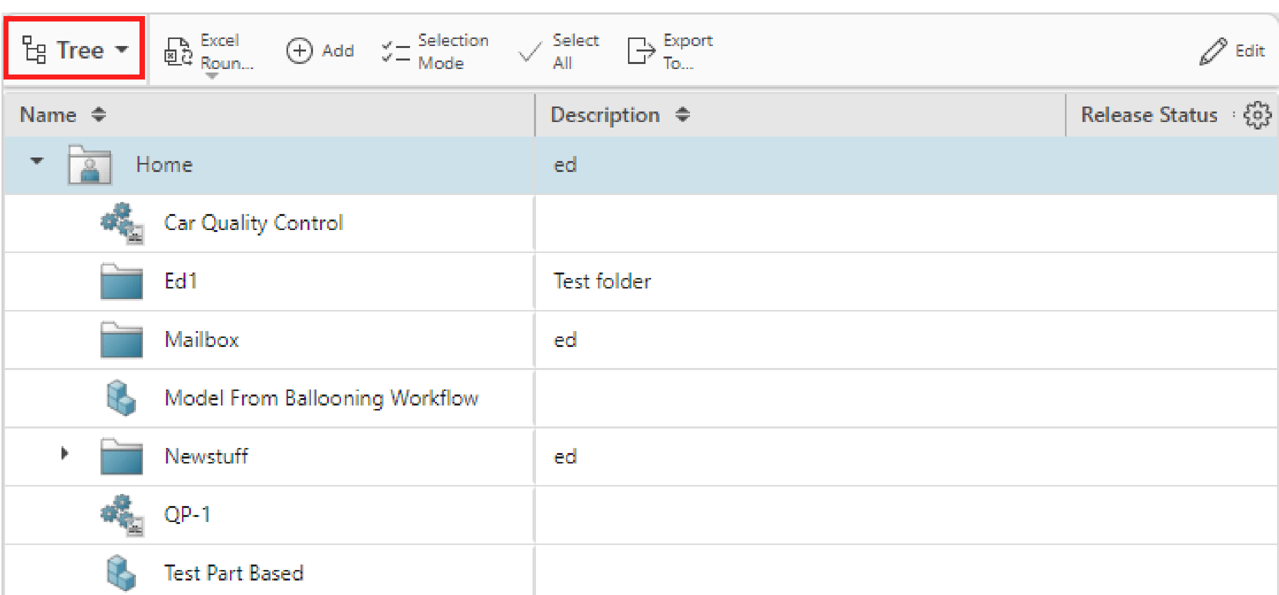
Note:

Table view is not available in narrow-interface mode.

Images in search results appear as follows.



In opened **Folders** you can also view the data as a tree.



Related topic: Using the relations Tree view to browse related objects

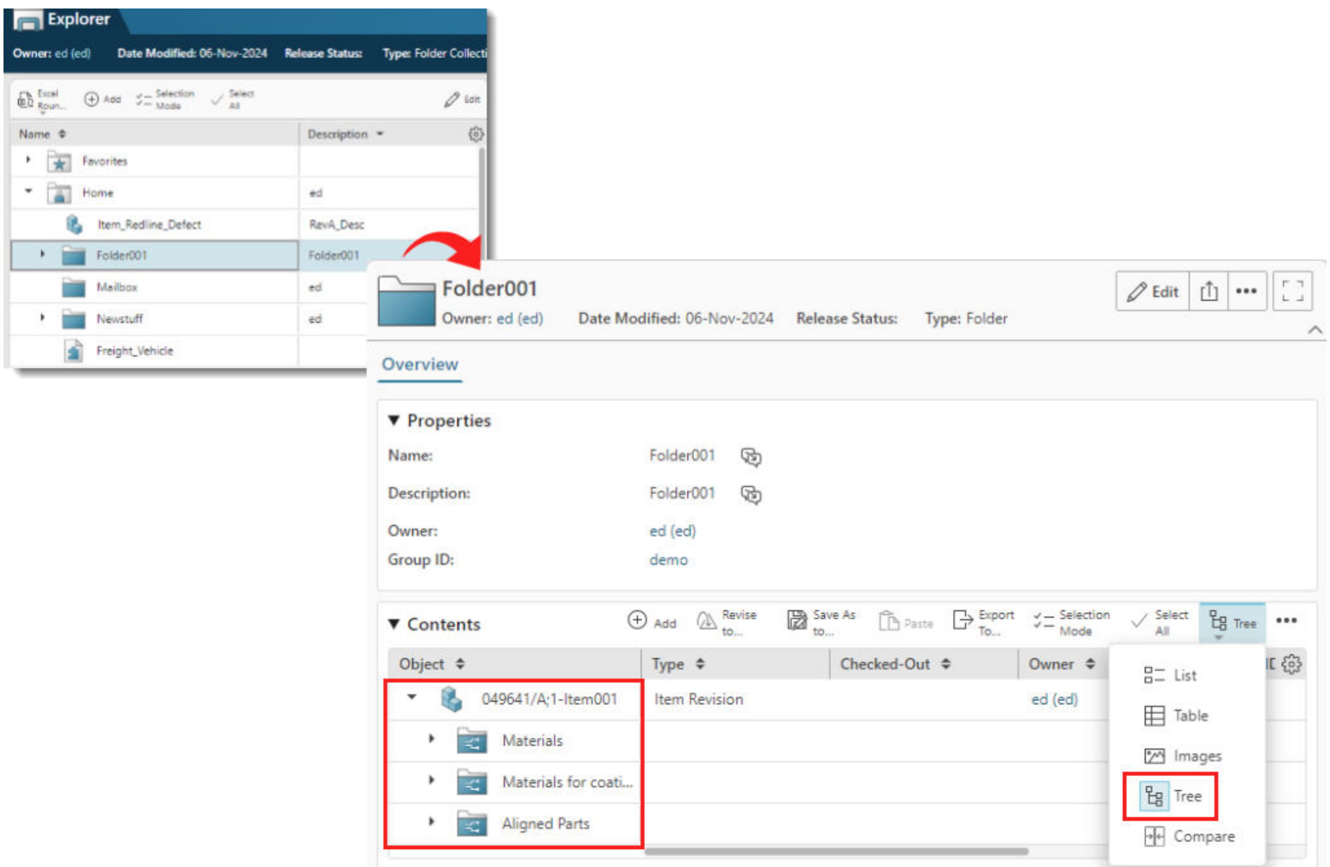
> Tip:
>
> The Explorer always displays data in a tree view.

Using the relations Tree view to browse related objects

The relations **Tree** view presents system-generated folders that collect related objects of different types such as attachments or specifications. It enables you to browse through the objects and perform some operations with them, such as **Add** and **Copy**.

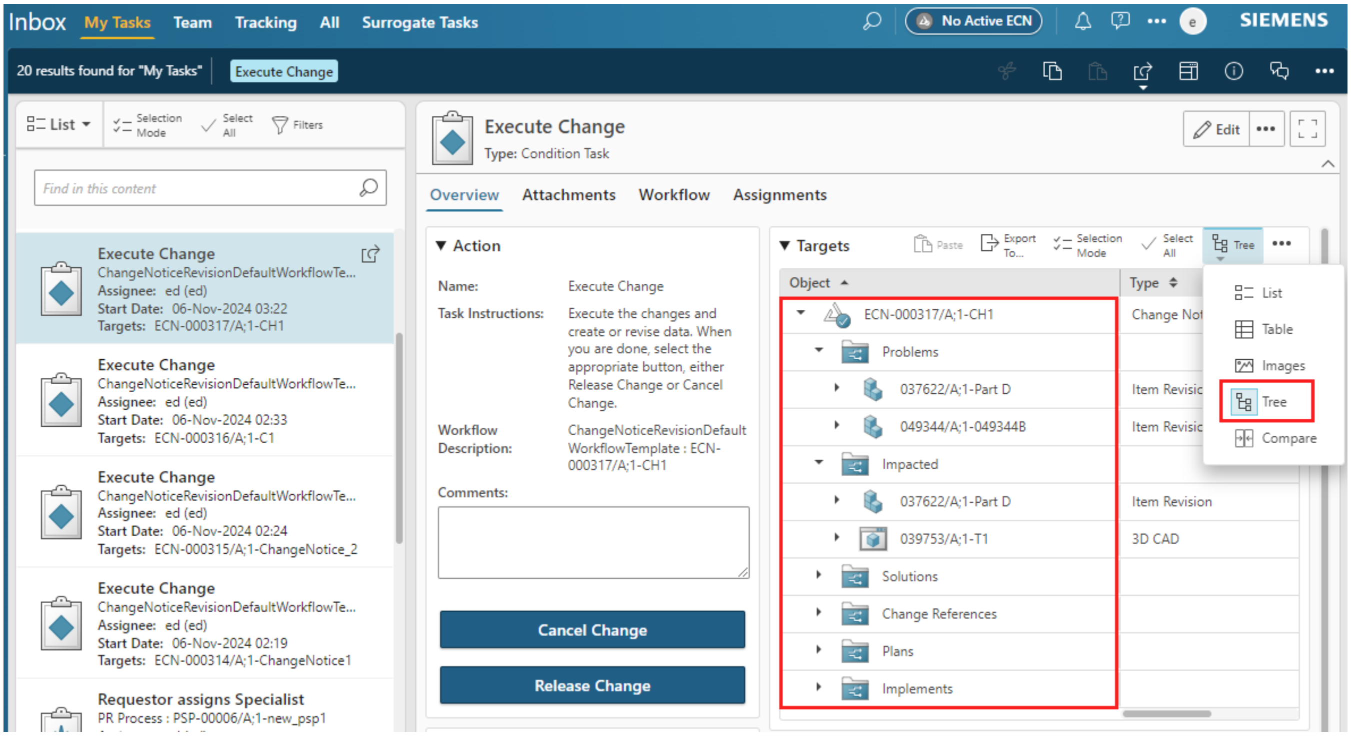
Relations Tree view in Explorer

When a folder is selected in **Explorer**, you can view and browse the relations tree folders in the **Contents** section by selecting **Tree** and expanding the first node in the **Object** column.



Relations Tree view in the Inbox

When an item such as a task or a change is selected in the **Inbox**, you can view and browse the relations tree folder in the **Targets** section by selecting **Tree** and expanding the first node in the **Object** column.



Relations tree folder operations

- You can add items to folders in the relations **Tree** view by clicking **Add** ⊕.
- In **Explorer**, you can copy an item you select in the main tree and paste it into a relations tree folder in the **Tree** view of the **Contents** section using **Copy** and **Paste**, or by dragging.
- You can view information about an object selected in the relations **Tree** view by clicking **Information** ⓘ.
- You can customize the columns in the table when the **Tree** view is displayed.
- You can sort the relations tree folders according to type using the **Type** column header.

> Tip:
>
> You cannot cut, copy, or delete the relations tree folders themselves.

Open folders and select the view

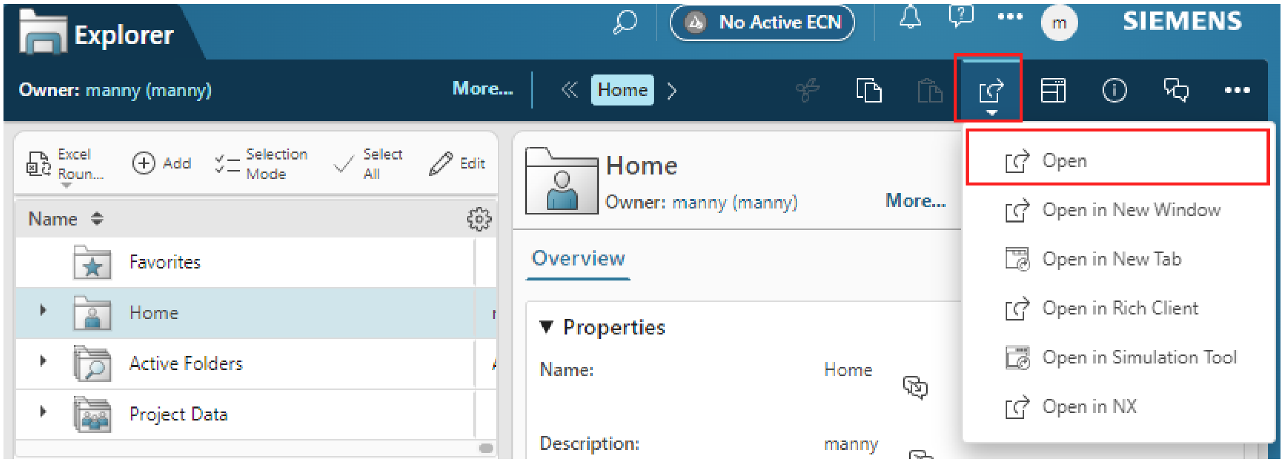
When you navigate to and select a folder in **Explorer**, you can open it and choose a view mode. Each view mode displays the folder contents in a different way.

The available view modes are **List**, **Table**, **Table**, **Tree**, and **Tree**.

1. From the navigation, select **Explorer**.

2. Select the folder that you want to open from the tree view.

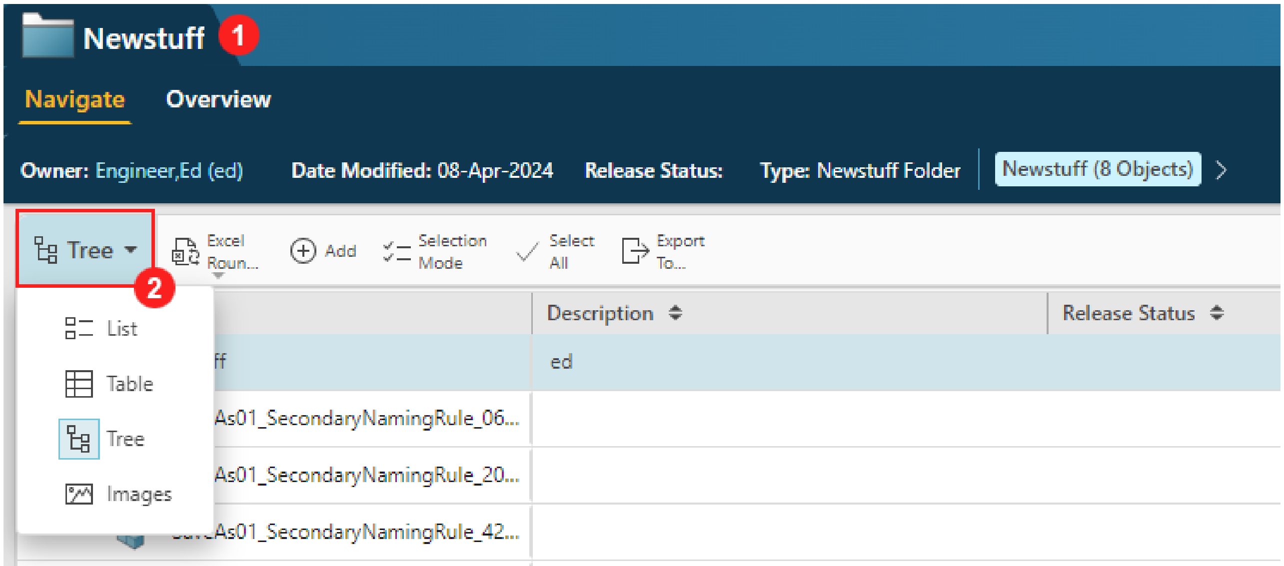
3. Click **Open**.



The folder displays the contents in the default view mode.

4. (Optional) Change the view of the contents by selecting the required view mode from the list.

   The tab in the header displays the currently-open folder (1). You can change the view mode using the selector (2)

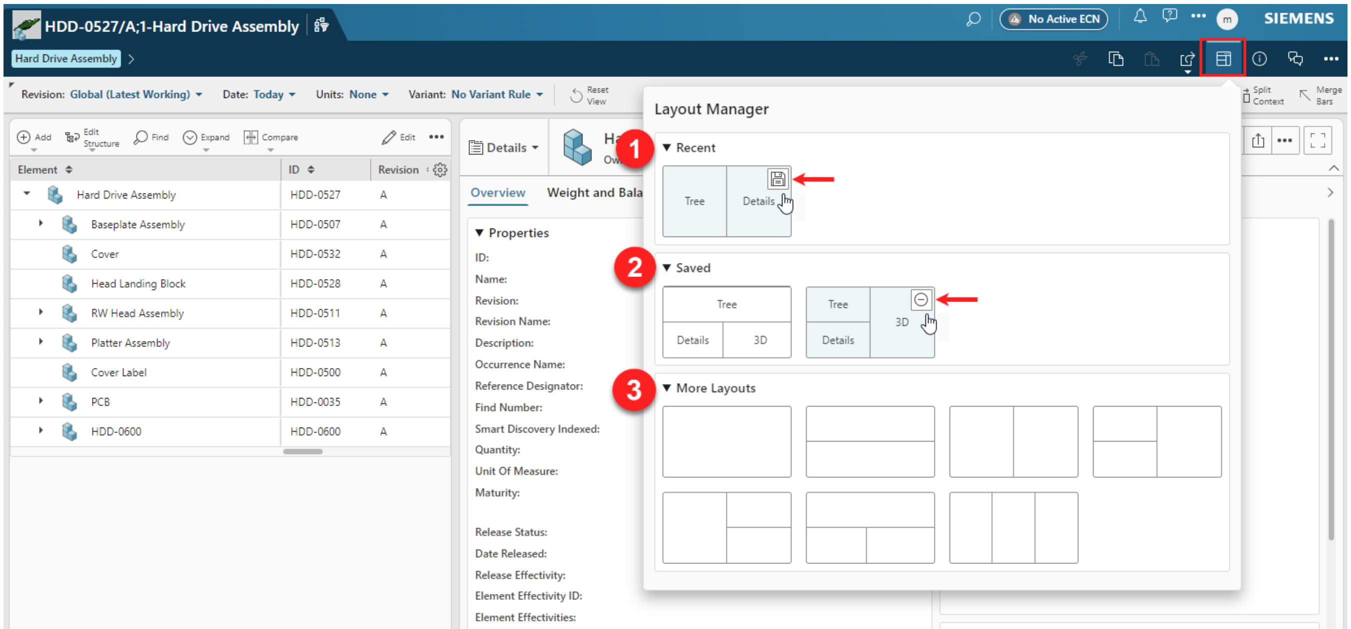


> Note:
>
> Folders always open in the default view mode.

Using Layout Manager

Layout Manager enables you to change the layout of the page you are currently viewing. You can switch to a recently-used layout, a layout that you have explicitly saved, or another selection from the layouts available for the current page.

To display the panel, click **Layout Manager** on the primary toolbar. To close it, click the toolbar icon again or anywhere outside the panel.



1 The **Recent** section displays up to four of your most recently used layout arrangements.

You can save a layout arrangement displayed in this section by hovering over a layout arrangement and clicking **Save**.

2 The **Saved** section displays your saved layout arrangements.

Once you have saved eight arrangements, you must delete at least one before you can save another. To delete, hover over a layout arrangement and click **Remove**.

3 The **More Layouts** section displays all available layout arrangements. The layouts vary depending on the page you are on.

> Note:
>
> Some pages, the **Explorer** page, for example, have only a few available layouts and the **Recent** and **Saved** sections are not present.

Storage of layout information

Page layout information is stored locally. The first time you open a page in a browser or device, or if you open the same URL in a different browser or device, the default layout configured on the server is applied. When you select a different layout, it is then applied each time you return to the same page until you select another layout. Saved layout information is lost if you clear your local storage. Revisit the page and select one or more layouts. This adds them to the **Recent** section and you can optionally save them from there.

Tip:

You must clear your client browser storage to access any new layout configurations published on the server. Your administrator can inform you about newly available layouts.

Working with tables

Edit data in tables

Tables are a common way of displaying data in the user interface. It is important to have a basic understanding of the main table features and how you can edit data in tables.

There are two ways to edit data while you are in the table view.

- Click **Edit**, tab through cells and expand or collapse the objects with child elements. After making your changes, click **Save Edits**.
- Directly edit table cells by double-clicking them. If **Autosave Tables** is enabled in your user properties, when you click off the cell, the changes are saved automatically. If this is not enabled, you must click **Save Edits** to save your changes to the table.

You can click a column header and then select **Hide Column** to hide an entire table column. To show the column again, click to the right of the column headings to open the **Arrange panel**. From here, you can add the hidden column back to the table.

You can sort the data in the table by clicking the column header and choosing to sort by ascending, descending, or no sorting. If a table column contains values of dissimilar data types, the table sorts based on the string values for the data.

Some tables do not save customizations made to the table, such as hiding, freezing, or resizing columns. They also may not support modification of column arrangements and drag and drop functionality. Any changes made to these types of tables are lost when the table is reloaded.

For more information on working with tables, see the following topics.

List, Table, Image and Tree views

Arrange, wrap text, and save the order of columns

Modify table and tree appearances

Add table columns in real time

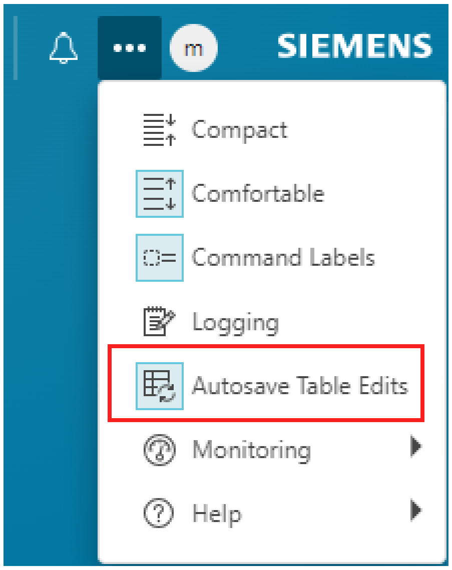
Automatically save table settings

Autosave table edits

You can select the option to automatically save changes made to tables. When this option is enabled and you edit a table cell by double-clicking it, the changes made to the cell are automatically saved when you click off the cell.

- If you edit a table with autosave off, you must save the changes made to the table cells by clicking **Save Edits**.
- Some table cells may not support autosave. You must manually save changes made to these table cells.
- Some tables may only support autosave editing. In this case, changes made to the cells are automatically saved, even if you have autosave turned off in your profile.
- If you enable **Autosave Tables** while you have unsaved table edits, the system prompts you to **Save** or **Discard** the table edits before enabling autosave.

1. In the global header Session controls, click **Settings** •••.
2. Click **Autosave Tables** to turn on auto saving of changes made to table cells.



> Note:
>
> **Autosave Tables** is enabled for all users by default.

Modify table and tree appearances

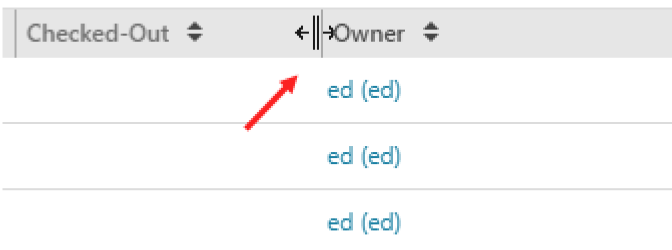
You can modify the display of tables and tree views in several ways.

- Change column widths.
- Hide columns.
- Freeze and unfreeze columns.

Change column widths

You can easily change the column widths for either **Table** or **Tree** views.

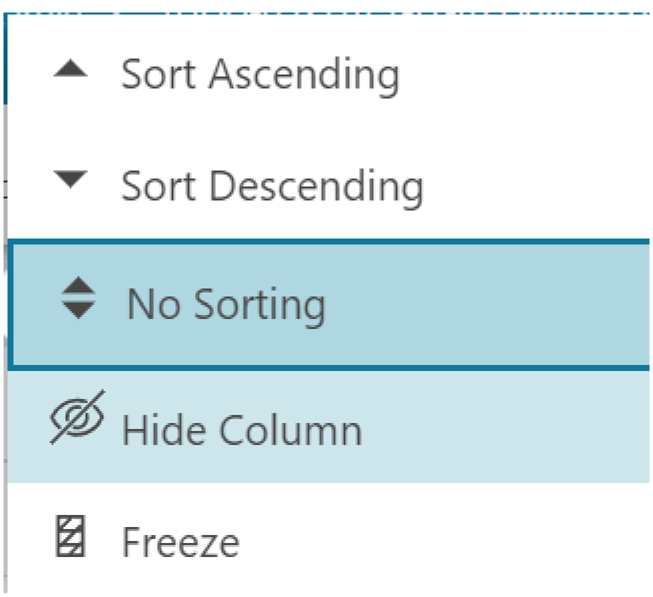
Tap or hover at the far-right of a column in the column header to display the column divider indicator and drag it to the left or the right.



Hide Columns

Columns that contain information that you do not need can be hidden from the table view.

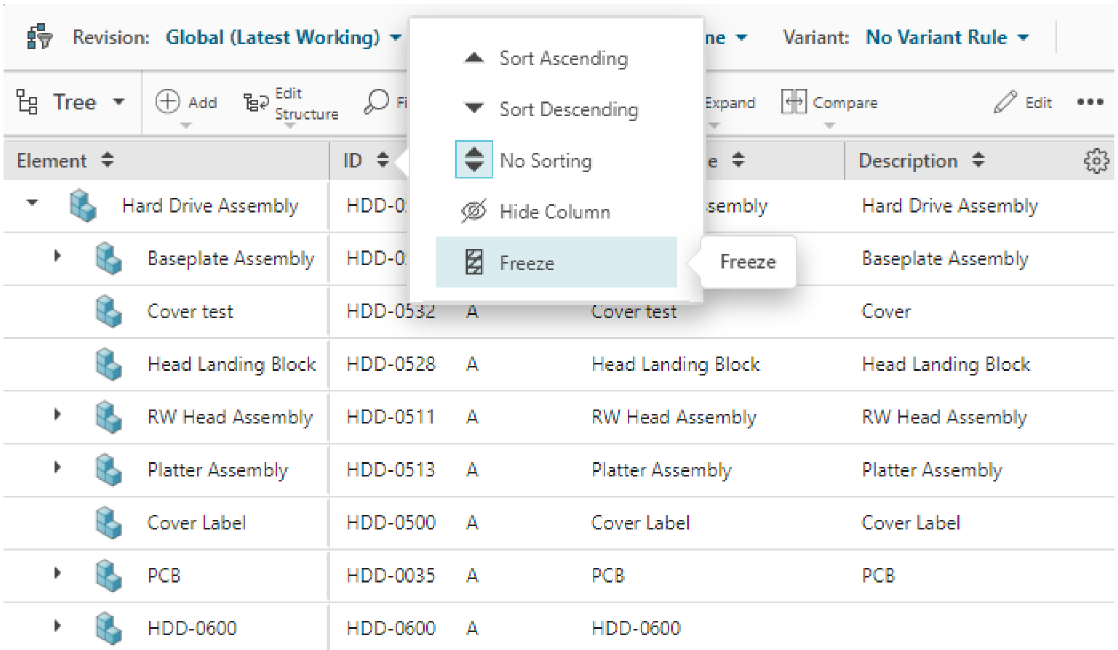
To hide columns, click the column header, then click **Hide**.



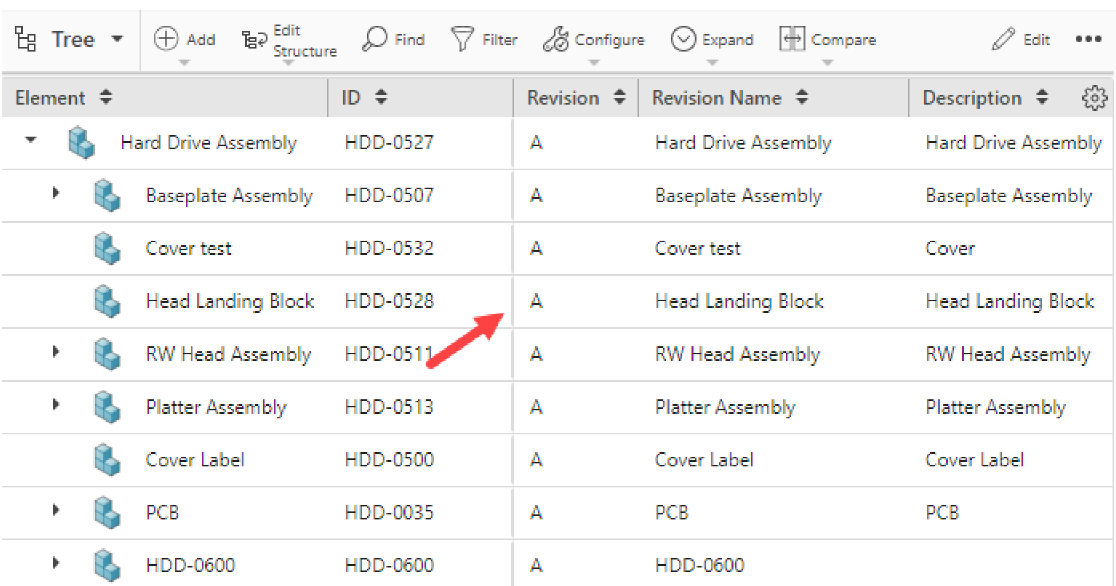
Freeze and Unfreeze columns

The first column is frozen by default for **Table** and **Tree** views. This is indicated by a dark right column border.

To freeze additional columns, click the column header, then click **Freeze**.



The column (and all the columns to the left) are frozen, meaning they are not part of the horizontal scrolling region.



To unfreeze columns, click the column header and click **Freeze** again.

Note:

You can't unfreeze the first column in the **Table** or **Tree** views.

Add columns to a table

When viewing a table or tree, select **More Columns** in the **Arrange** panel to load all available properties and display selected ones as table columns. See **Add table columns in real time**.

Arrange, wrap text, and save the order of columns

You can use the **Arrange** panel to reorder, hide, or display columns in either the **Table** or **Tree** view.

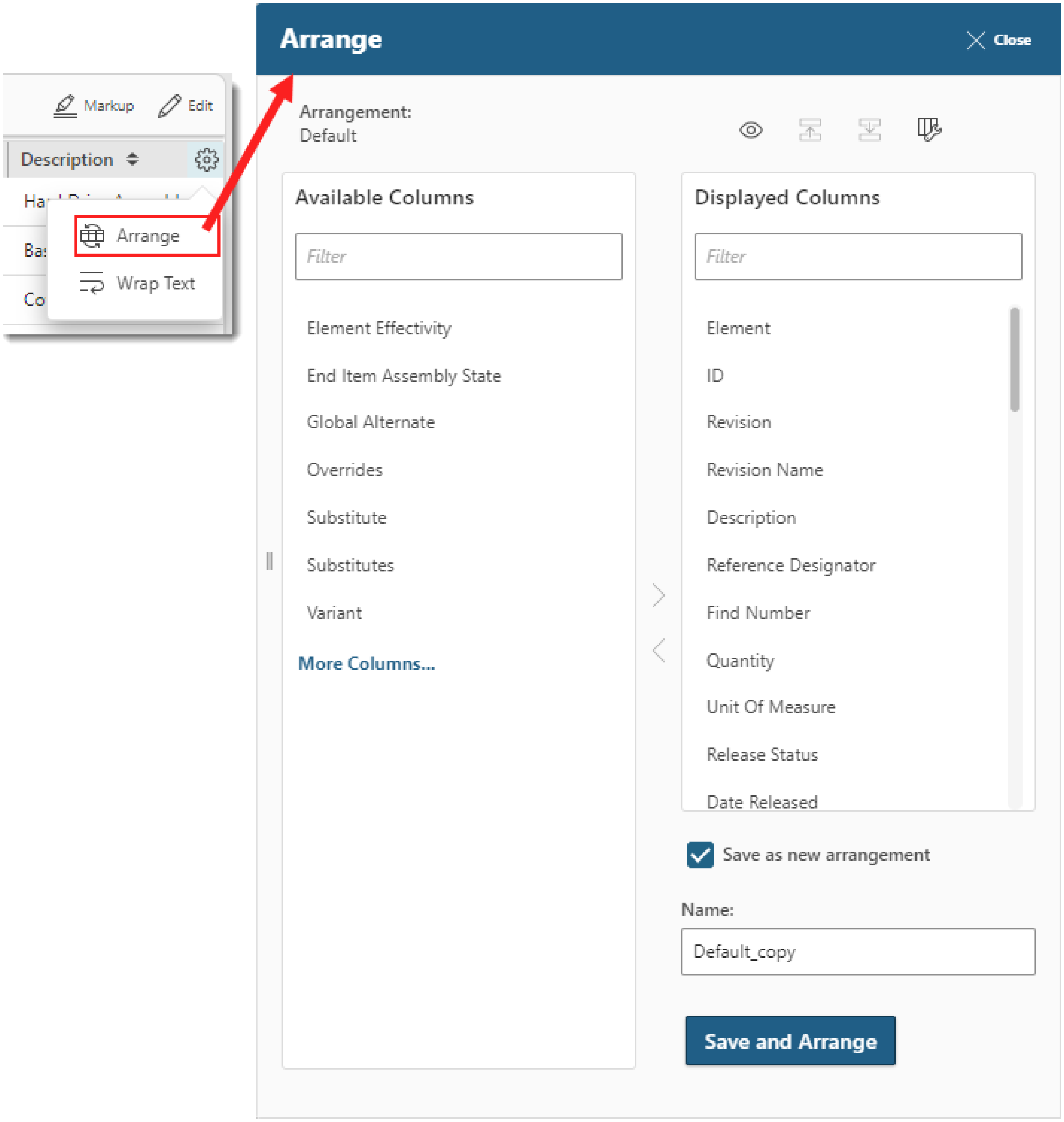
The **Arrange** panel contains the **Available Columns** that can be added to the table or tree and the **Displayed Columns**, which are the columns currently displayed.

Tip:

Adding or removing columns from the **Displayed Columns** list enables the **Save as new arrangement** check box so you can quickly **save your customized column configuration** so that you can easily apply it to views in future sessions.

The Arrange panel

To open this panel, click the **Table Settings** icon to the right of the column headings and select **Arrange**.



Show All / Show Common

Displays all available properties as columns or only the common properties for the objects in the table.

Move up

Select one or more column names in the **Displayed Columns** list, then click to move the selected column(s) upward in the list.

You can optionally drag the selected column(s) instead of using the icon.

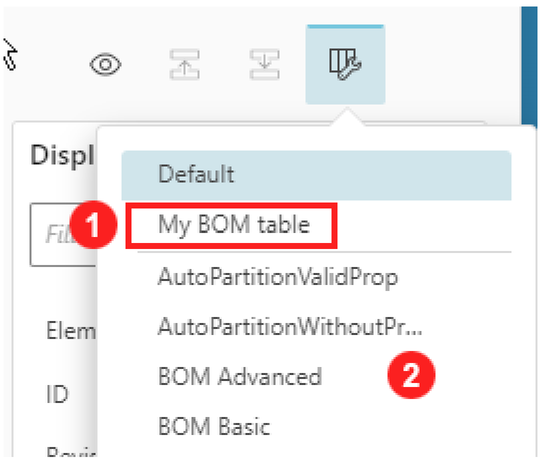
Move down

Select one or more column names in the **Displayed Columns** list, then click to move the selected column(s) downward in the list.

You can optionally drag the selected column(s) instead of using the icon.

Column arrangements

Select a saved column arrangements to apply it to the view.



Column arrangements you create (1) appear at the top of the list above the dividing line after the **Default** arrangement. You can only delete column arrangements you create.

Column arrangements created by administrators (2) appear below the divider. You cannot delete or modify them. However, you can save them as new column arrangements which you can modify.

Add

Select one or more columns in the **Available Columns** list on the left. Then click to add the selected column(s) to the **Displayed Columns** list.

You can optionally drag the selected column(s) instead of using the icon.

Remove

Select one or more columns in the **Displayed Columns** list on the right. Then click to remove the selected column(s) from the list.

You can optionally drag the selected column(s) instead of using the icon.

> Note:
>
> If the properties list is long, you can type a property name in the **Filter** field to display a specific property.

You can select multiple columns to move groups of columns up or down the list by doing the following:

- Shift-click to select a range of columns if they are in consecutive order.
- Ctrl+click nonconsecutive columns to select them.

> Note:
>
> If search results are obtained from a set of external data, such as from a non-Teamcenter database, you may not be able to sort items in a column because the data model for these items does not conform to the Teamcenter properties displayed in the column headings.

You can also drag column headings to rearrange the column order of a table.

> Note:
>
> Some tables do not save customizations made to the table, such as hiding or freezing a column, or support making changes to the column arrangements. Any changes made to these tables are lost when the table is reloaded. These tables also do not have the **Arrange** option in the table settings.

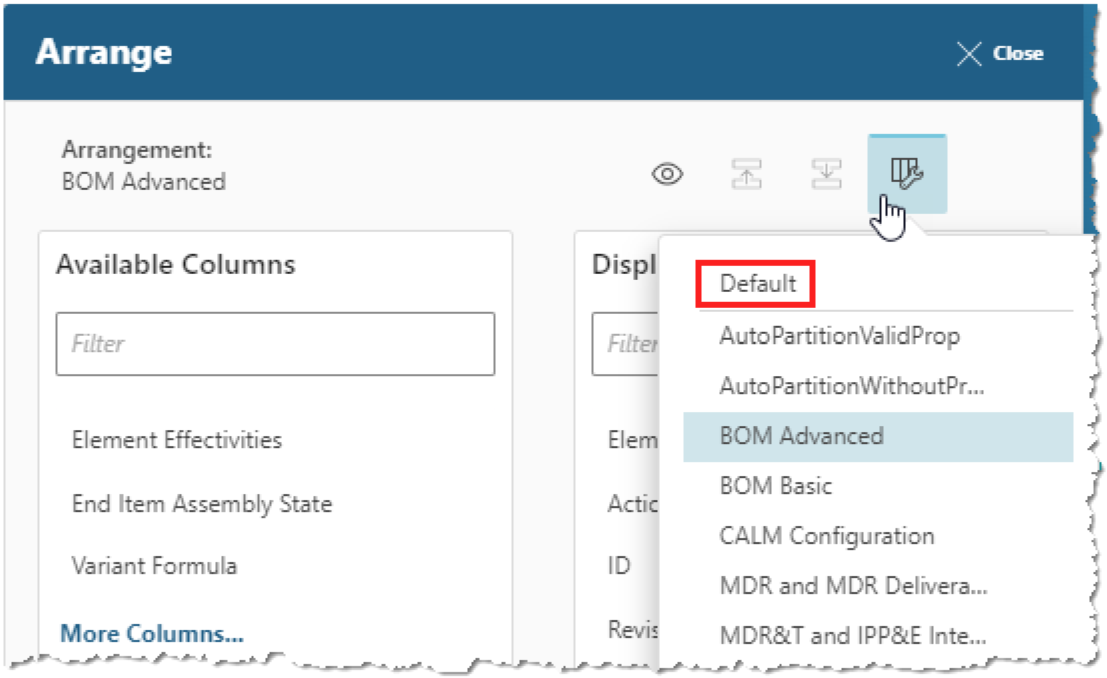
Save your column arrangement

When you change the current column arrangement by adding, removing or reordering columns in the **Arrange** panel, the system creates a copy of the column arrangement including your changes, selects the **Save as new arrangement** option, and prefills the **Name** box appending "**_copy**" to the name of the current column arrangement. For example, if you modify a column arrangement named **BOM basic**, the prefilled name is **Bom basic_copy**. You can optionally change the prefilled name and save your changes in the panel as a new column arrangement by clicking **Save and Arrange**.

This saves your column arrangement so you can apply it in the future. You can click **Column Arrangements** on the **Arrange** panel to see a list of all your saved column arrangements.

Reload the default column arrangement

You can reset a table to its default column arrangement by opening the **Arrange** panel, clicking **Column Arrangements**, and selecting **Default** in the list.

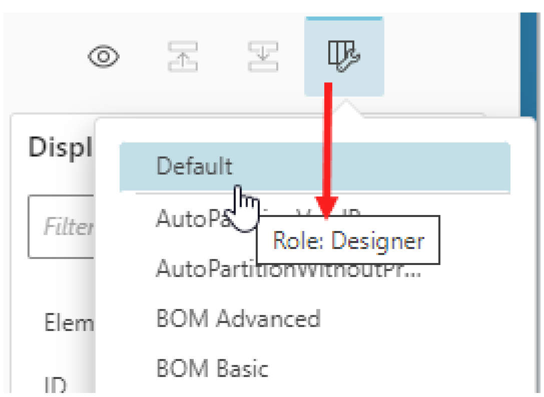


Note:

- **Default** is always first in the list of column arrangements and you cannot delete it.

- Administrators can define different **Default** column arrangements for different contexts. If you are a member of more than one group, or if you have different roles with a group, the columns displayed in the **Default** column arrangement can differ depending on your current group and role selection in your session controls. If you do not see an arrangement you are expecting it is probably configured for a context different from your current one.

- When you hover above **Default** in the list of column arrangements, a tooltip indicates the scope of the arrangement. Possible scopes are: workspace, group, role, and site.



- The **Default** column configuration in object set tables is always driven by the user's XRT properties.

- For information about work contexts and session controls, see **User properties** and **Change your group, role, or project for your session**.

Wrap table text

You can toggle text wrapping to have text in table cells automatically start at a new line once it reaches a certain length. This helps tables with large amounts of text look cleaner and makes reading the data easier.

Click ⚙ to the right of the column headings and then select **Wrap Text** to enable text wrapping for the table. The command remains highlighted to show that wrapping is enabled. You can click it again to turn it off.

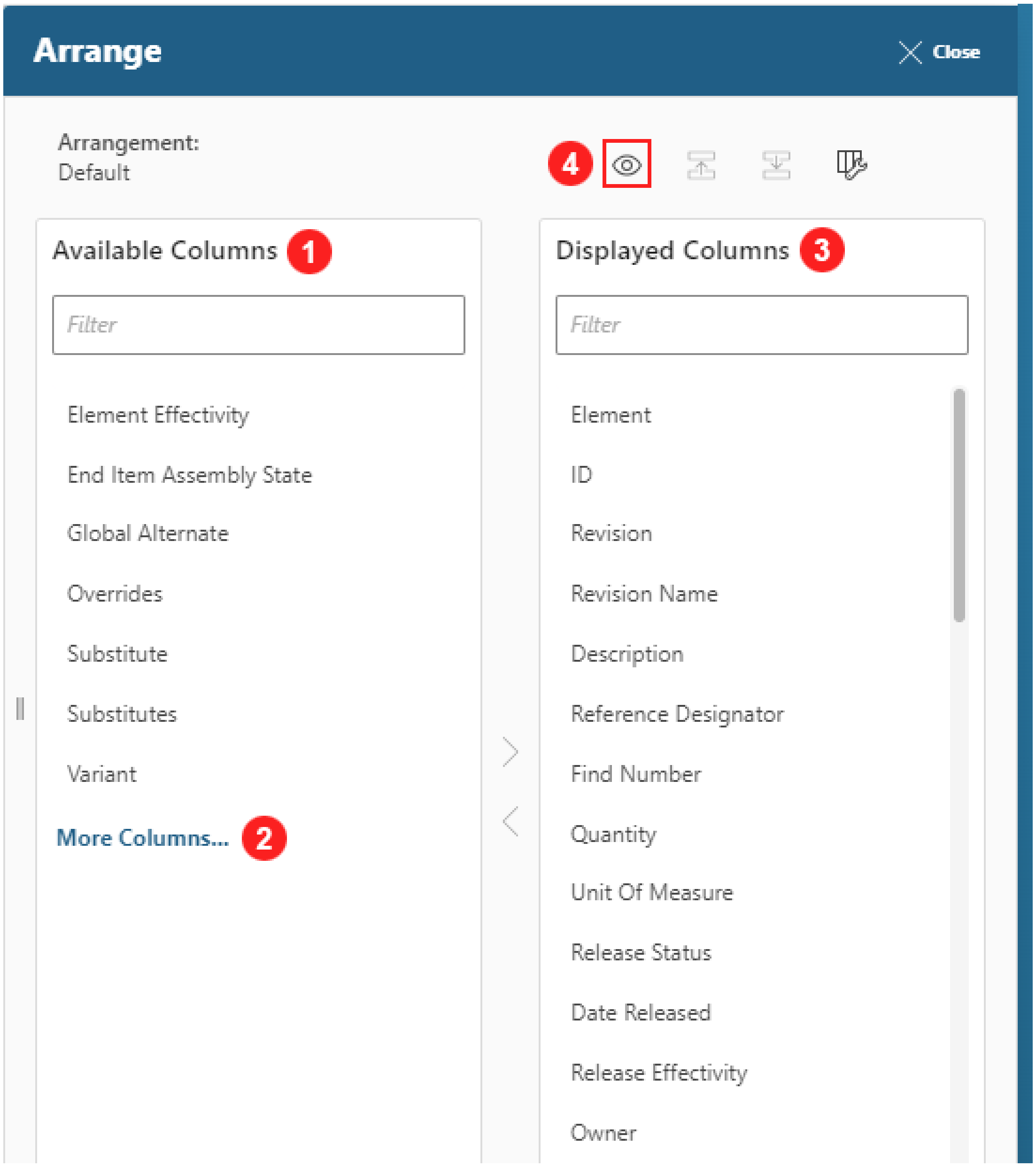
Automatically save table settings

Some table settings for some types of tables save automatically when you change them and are restored on next access. Persistence of table settings differs somewhat depending on the type of table.

- An objectSet table in **Summary** view: the last settings in effect for column sorting, text wrap and **saved filters** save automatically when you navigate away. The settings are restored the next time you access the same table and they persist until you change them.
- Primary work area tables: settings for text wrap, column sorting, and column arrangement persist automatically only if a server-side column configuration for the table exists.
- Search results table: changes you make to table settings do not persist when you navigate away.

Add table columns in real time

Create, save, and open different column arrangements to control which columns appear in tables and trees. When viewing a table or tree, the default column arrangement appears if you have not previously viewed the table. If you viewed the table previously, you see the last column arrangement used. You can open a different column arrangement, or add more columns to a table you are currently viewing to create a new column arrangement.



- Use the **Arrange panel** to add more columns to a table you are viewing by adding properties to the **Displayed Columns** list (3).
- You select the properties you want to add as table columns from the **Available Columns** list (1).
- If a property you want to add does not appear in the list, you can click **More Columns** (2) to load more properties.
- The **Show Common** icon (4) switches between displaying all properties or only common properties.

Procedure

1. While viewing a table, open **Table Settings** > **Arrange**.

   The **Arrange** panel opens. The properties appearing in the **Displayed Columns** list are those shown as table columns by the current column arrangement. Properties in the **Available Columns** list, if any, are available in the current configuration, but are not displayed as table columns.

2. If a property you want to display as a table column doesn't appear in the **Available Columns** list, click **More Columns** to load more properties.

   The **Available Columns** list populates with available properties of the object types in the current column arrangement.

3. In the **Available Columns** list, double-click an item to add it to the **Displayed Columns** list.

   If multiple list items have the same name, you can hover over them to see the distinguishing type in a tooltip.

   Use the search box above the **Available Columns** list to filter the items. You can search for names of properties or names of object types.

   You can optionally drag items from one list to the other.

   The **Save as new arrangement** check box becomes selected and the name of the current column arrangement is written to the **Name** box with **_copy** appended to it.

4. Optionally edit the value in the **Name** box and click **Arrange** to save your changes as a new column arrangement.

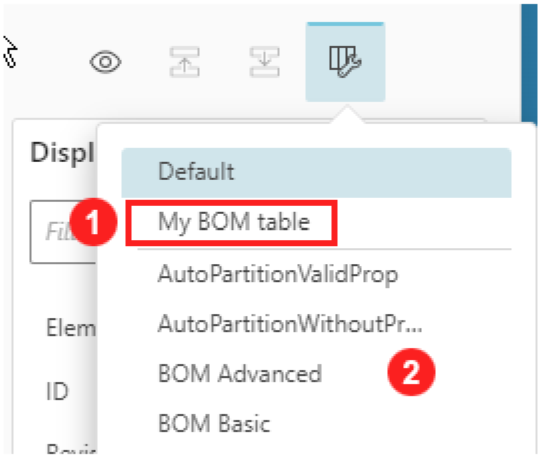
   If you do not want to save your changes click **Close**.

Results

The properties you added to the **Displayed Columns** section now appear as columns in the table.

Column arrangements you create (1) appear at the top of the list above the dividing line after the **Default** arrangement. You can only delete column arrangements you create.

Column arrangements created by administrators (2) appear below the divider. You cannot delete or modify them. However, you can save them as new column arrangements which you can modify.



Filter data in a table column

You can filter the data within a table column so you can easily see the data that is important to you.

Tip:

Column filtering is not supported in **Table** view in advanced search results.

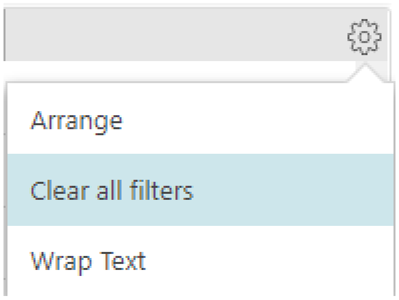
Note:

You can click a column header and then select **Hide Column** to hide an entire table column. To show the column again, click the cog wheel icon and select **Arrange** to open the **Arrange panel**. There you can add the hidden column back to the table.

To access the filtering, click anywhere in the header of the table column to filter. There are four types of filters available depending on the types of data; **text filtering**, **facet filtering**, **date filtering**, and **number filtering**. The available filtering depends on the data your are viewing. Some columns do not support filtering. Others do not support facet filtering.

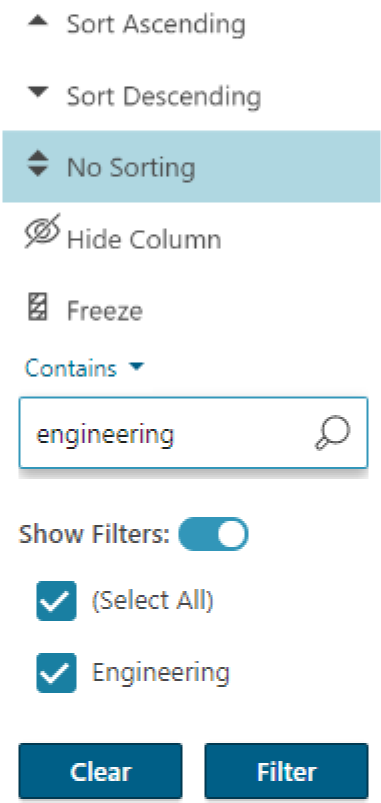
To remove filters:

- To clear an individual column filter, click **Clear**.
- To clear all filters, click the **Table Settings** icon to the right of the column headings and then select **Clear all filters**.



Text filtering

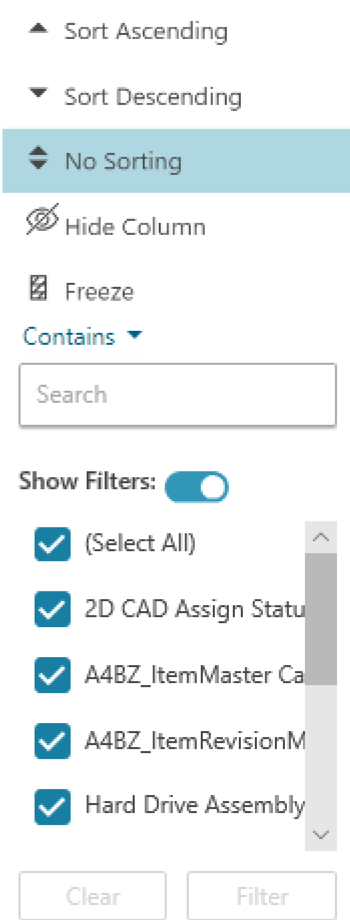
Text filtering enables filtering for any table column that contains text.



- Do not use wild cards. Just enter a text string to filter on and click **Filter**.
- You don't need to differentiate between upper and lower case.
- When you enable facet filtering by clicking **Show Filters** for the column, the list of values automatically narrows as you type the text.
- The default matching mode for text filtering is contains, which shows all values that contain the specified filter criteria. You can change to other matching modes, such as **Does not contain**, **Begins with**, **Ends with**, **Equals**, and **Does not equal**.

Facet filtering

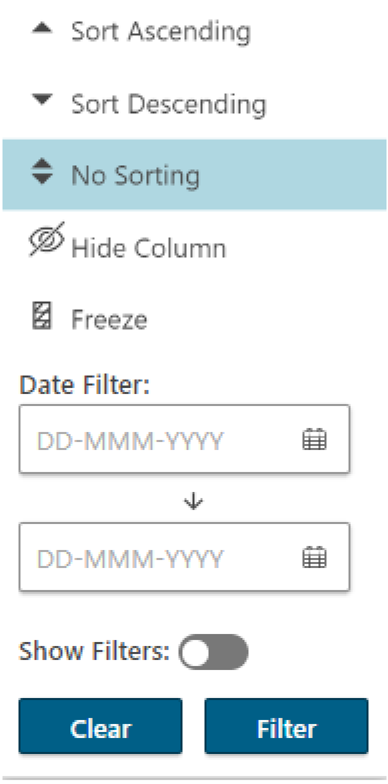
Facet filtering displays all the available values in table columns, based on the current table values and the filter criteria entered.



Click **Show Filters** to view the values for the table column. You can select the values you want to filter by, and then click **Filter** to show only the selected values.

Date filtering

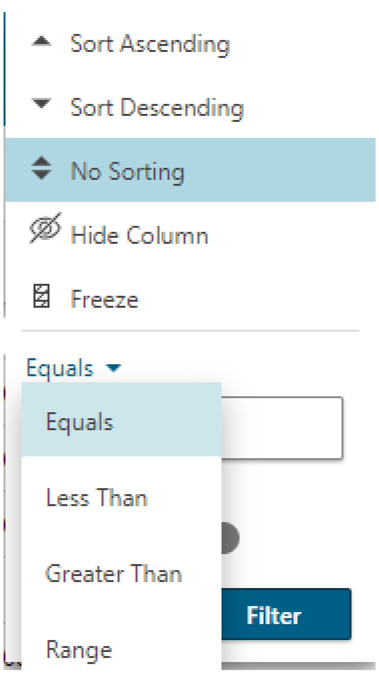
Date filtering enables filtering for table columns that contain dates.



You can set a single date or a date range using the pop-up calendar.

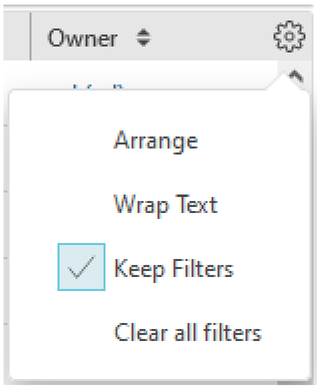
Number filtering

Number filtering enables filtering for table columns containing numeric data.



Keep filters between views

Unlike other settings such as sorting and text wrap, filters you set do not automatically persist when you navigate away. After you have set filters, if you want to save them so that they are reapplied automatically next time you view the table, select the **Table Settings** icon to the right of the column headings and then select **Keep Filters**.



The state of the **Keep Filters** option persists until you deselect it or select **Clear all filters**. The state of the **Keep Filters** option is also cleared, and the option is hidden if you remove all the table filters using **Clear all filters** or the column menu.

Note:

Saving column filters is not supported in **Table** view in advanced search results.

Exporting tables to Microsoft Excel

You can quickly export data from tables to Microsoft Excel format to share the data with others who do not have access to it through your Teamcenter infrastructure and clients.

1. On the table you want to export, click **Excel Round-trip** > **Export to Excel**.

   The **Export to Excel** panel opens. The table columns are automatically added to the export and are displayed in the same order as the table.

2. Do any of the following:

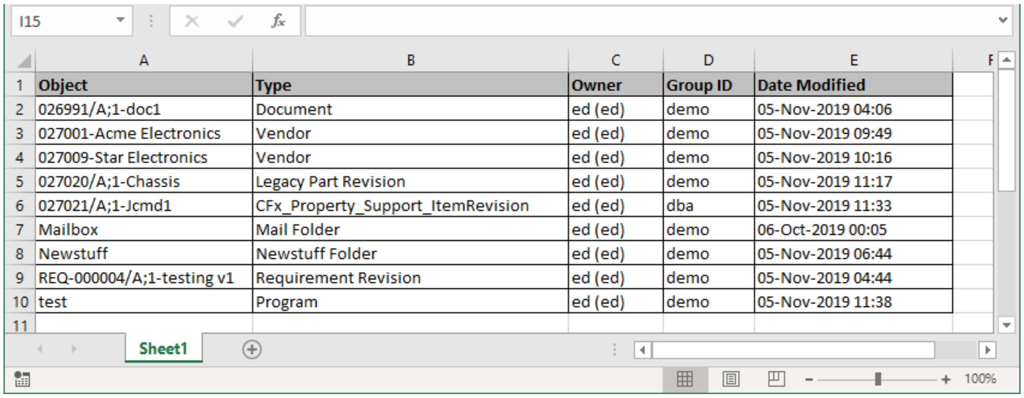
   - To rearrange the order of the table columns prior to export, select the column you want to move and then click **Move up** or **Move Down** to change the order.

   - To remove a column, select it and then click **Delete**.

   - To view a list of all the columns for the table, click **Add Properties**. Columns that are selected for export are checked. Any columns deleted from the export or which were hidden in Active

Workspace are unchecked. You can restore a hidden or deleted column by selecting it and then clicking **Add**.

3. Click **Export**. The system automatically generates a file name and downloads the Excel spreadsheet.



Object	Type	Owner	Group ID	Date Modified
026991/A;1-doc1	Document	ed (ed)	demo	05-Nov-2019 04:06
027001-Acme Electronics	Vendor	ed (ed)	demo	05-Nov-2019 09:49
027009-Star Electronics	Vendor	ed (ed)	demo	05-Nov-2019 10:16
027020/A;1-Chassis	Legacy Part Revision	ed (ed)	demo	05-Nov-2019 11:17
027021/A;1-Jcmd1	CFx_Property_Support_ItemRevision	ed (ed)	dba	05-Nov-2019 11:33
Mailbox	Mail Folder	ed (ed)	demo	06-Oct-2019 00:05
Newstuff	Newstuff Folder	ed (ed)	demo	05-Nov-2019 06:44
REQ-000004/A;1-testing v1	Requirement Revision	ed (ed)	demo	05-Nov-2019 04:44
test	Program	ed (ed)	demo	05-Nov-2019 11:38

Note:

If your browser is set to ask you where to save files before downloading, you can change the automatically generated file name and save location of the Excel file before downloading it.

Guided navigation using the Teamcenter Assistant

The Teamcenter Assistant

The Teamcenter Assistant suggests the next possible actions to perform and provides the relevant data required to perform them. These suggestions are based on the context, history, and usage frequency of actions performed by other previous users belonging to the same role and group.

When you perform tasks using Active Workspace, the system remembers the commands and the sequence in which the tasks are performed. The next time you, or other users who belong to the same role and group as you, log on, the system displays a set of commands based on the learning. You can either accept the commands suggested in the panel to complete your tasks or ignore them. The Assistant dynamically updates the sequence of tasks performed in each session. It learns the command usage and recommends the relevant command depending on the context for subsequent sessions.

Experienced users can log on using Active Workspace with special user credentials and train the Assistant on their preferred way of completing their tasks.

The Assistant panel displays your recent data, your team's recent data, your favorites, and the contents of the clipboard.

By suggesting the next logical commands, the Assistant helps to:

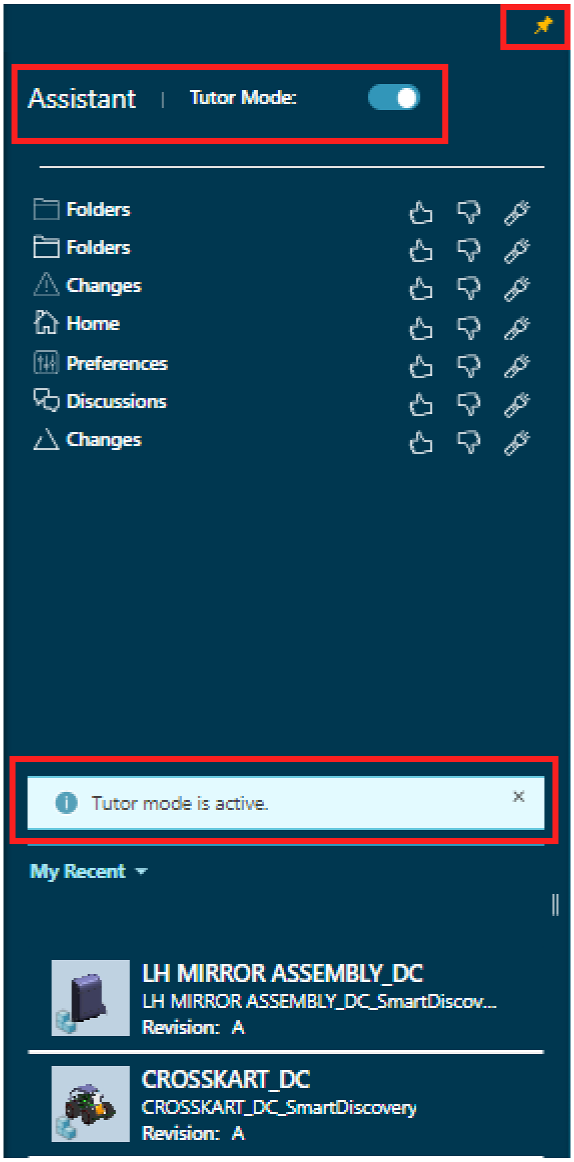
- Improve your efficiency by reducing the cognitive load.
- Minimize the number of mouse clicks required to perform your tasks.
- Reduce the total time required to complete a task.

Train the Assistant

You can use the **Tutor Mode** to train the Assistant to learn a preferred way to complete a task.

1. Log on using the credentials of a user profile that is specifically set up for training the Assistant.
2. In the global navigation area, click **Assistant** .
3. Click to pin the **Assistant** panel.
4. Turn on the **Tutor Mode** and start performing the steps required to complete your workflow.

   The system records your preferred way of completing the task.

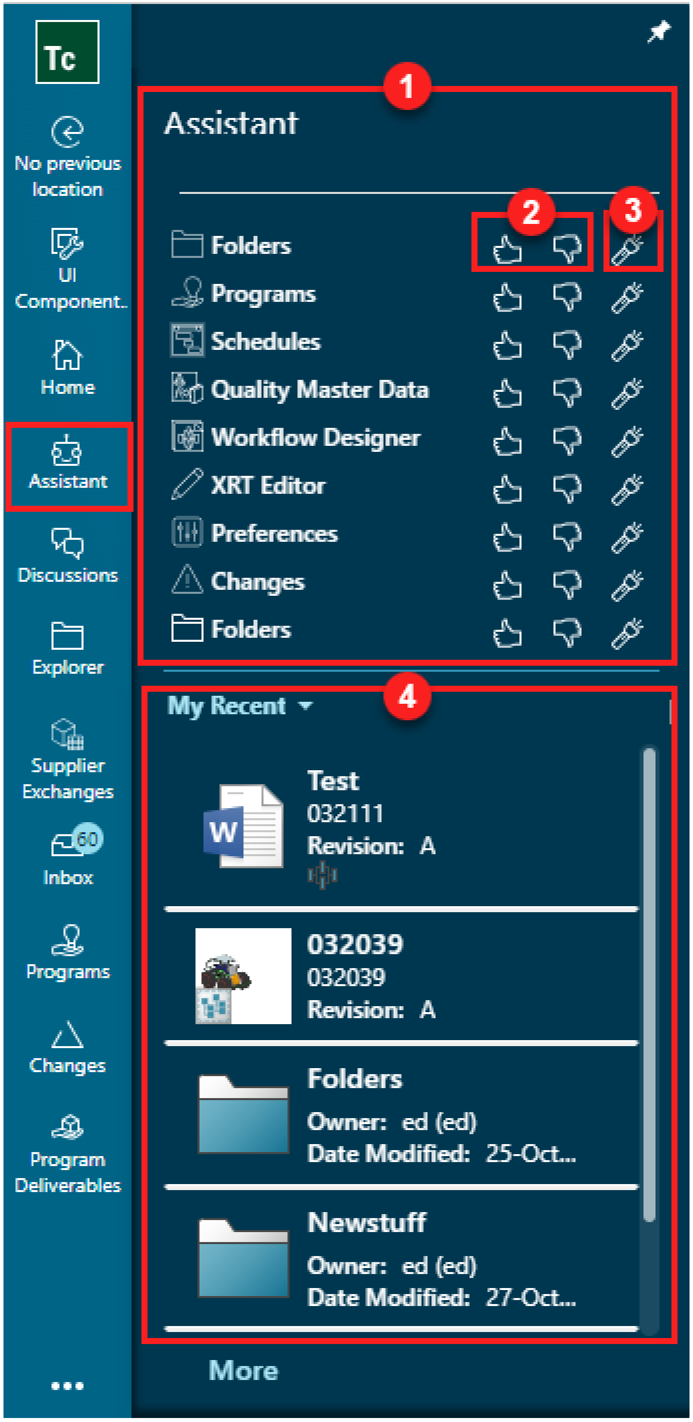


5. Turn off the **Tutor Mode** when you complete your task.

Now, when other users log on, the system recommends the commands that were used in the **Tutor Mode**. This can help companies leverage the experience of experts and standardize the use of good practices.

The Assistant panel

When you log on, you can view the **Assistant** icon in the global navigation area.



1 View up to 10 commands suggested by the **Assistant** panel.

These command suggestions are specific to a user. If the current user is logging on for the first time, the system generates the suggestions from the history of other users belonging to the same group and role.

2 Like or dislike commands suggested in the panel to prioritize the use of one command another.

The availability of these options can be configured by an administrator.

3 View the location of the suggested command.

The availability of this option can be configured by an administrator.

4 Choose options from the drop-down list to change the data displayed in the **Assistant** panel.

My Recent – View your recently created or modified data.

You can view up to 20 objects. The number of objects you want to display can be configured by an administrator.

Team Recent- View the data created or modified by users in the same group and project.

You can view up to 20 objects. The number of objects you want to display can be configured by an administrator.

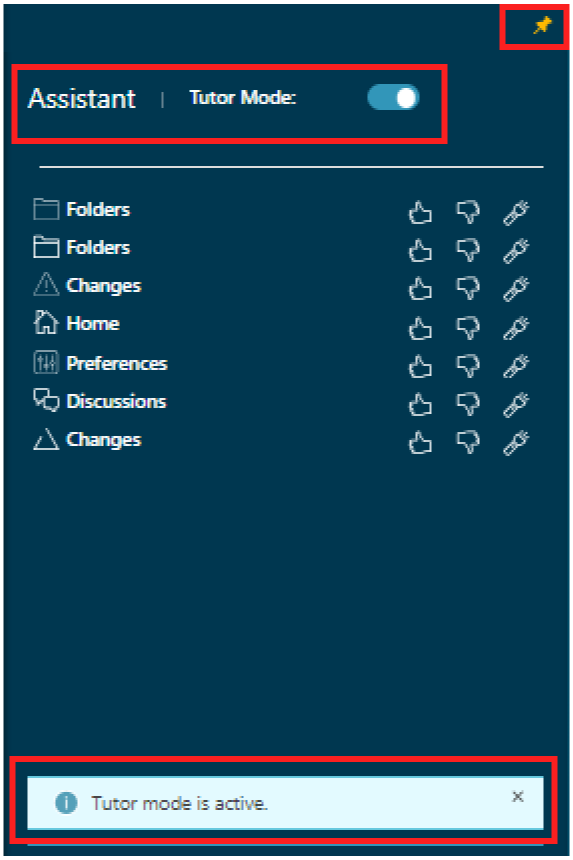
The types of objects you want to display can be configured by an administrator.

Favorites – View your favorites.

Clipboard – View the clipboard data.

The **Tutor Mode** is available when users log on using a specific user profile that is set up for training the Assistant and when they pin the **Assistant** panel. Use this mode to **train the Assistant** to complete tasks in a preferred way.

The availability of the **Tutor Mode** can be configured by an administrator.



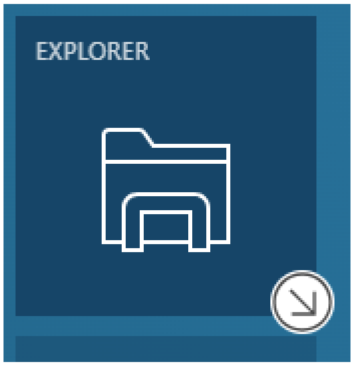
Modifying your home page

Resize a tile

You can customize the Home page in various ways to optimize your working experience. One customization is resizing the tiles.

1. Right-click the tile you want to resize, or left-click and hold the tile until you see an arrow button in the lower-right corner of the tile.

   On a touch device, tap and hold a tile to enter edit mode.



2. Click the arrow button in the lower-right corner of the tile.

   Depending on the current size of the tile, the tile either shrinks to a smaller size or grows to a large one.

   Some tiles, like the **Inbox**, display different information depending on the tile size.

3. To save your changes, click in a blank area on the home page.

Arrange tiles on the home page

Tiles are arranged in groups on the home page. You can rearrange the tiles within a group, move tiles between existing groups or move a tile to create a new group.

Move a tile within its group

1. Hover over the tile you want to move.

2. Click and hold down the left mouse button, or press and hold a tile on touch devices to select the tile for moving.

3. Drag the tile to a different position in the group, until you see the outline indicating the new tile position.

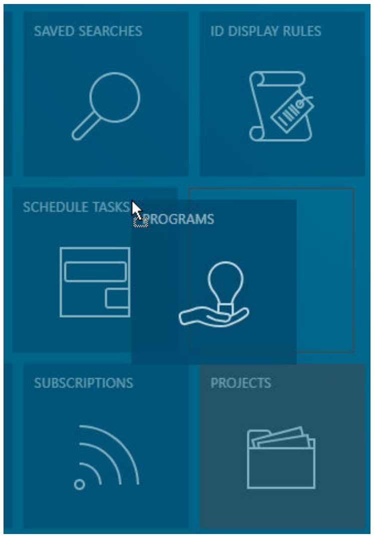
4. Drop the tile in the new position.

Move a tile to an existing group

1. Hover over the tile you want to move.

2. Click and hold down the left mouse button, or press and hold a tile on touch devices to select the tile for moving.

3. Drag the tile to a different group and position it near an existing tile, until you see the outline indicating the new tile position.



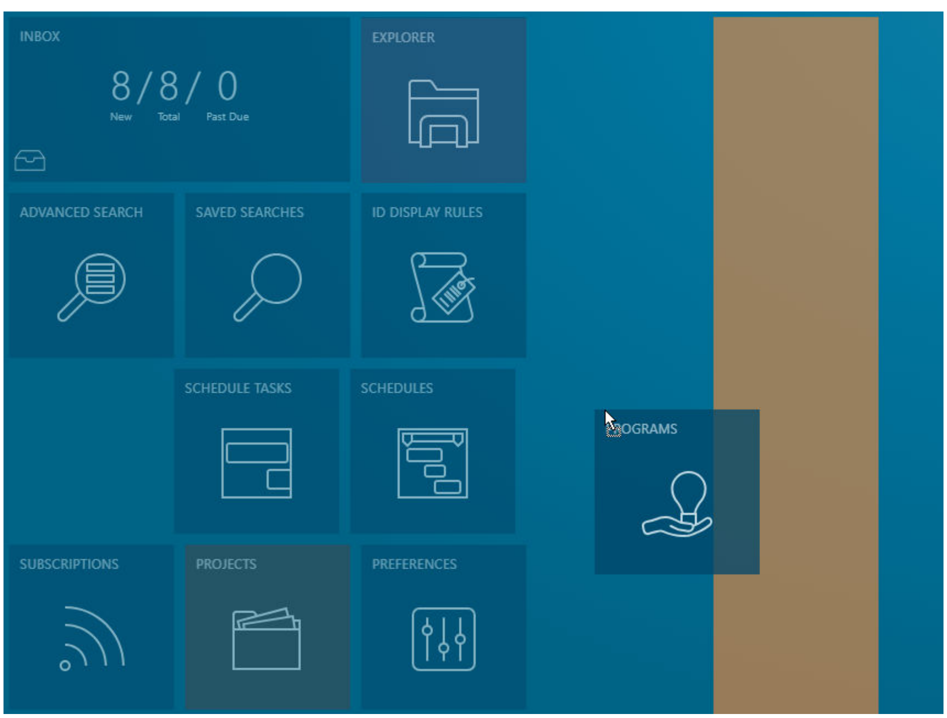
4. Drop the tile in the new position.

Move a tile and create a new group

1. Hover over the tile you want to move.

2. Click and hold down the left mouse button, or press and hold a tile on touch devices to select the tile for moving.

3. Drag the tile to an area between existing groups until you see the vertical bar indicating the new group position.



4. Drop the tile.

   The tile appears in the new group.

Pin an object to the home page

You can pin objects to your home page to more easily access them when needed.

1. Select the object you want to add to your home page. You can add the object from locations such as your **Home** folder, favorites, or search results.

2. On the primary toolbar, click **Manage** > **Pin to Home**.

   The object is pinned to your home page. Object data, such as the ID, revision, and description display above the pinned object.

> Note:
>
> If the text for the pinned object is long, some of it will not display above the object. You can hover over it to see all of the text.

Unpin a tile from the home page

You can pin objects to your home page to easily access them when needed. You can unpin pinned objects later on if you wish.

1. Right-click a tile, or left-click and hold a tile until you see additional controls on the corners of the tile.

On a touch device, tap and hold a tile to enter edit mode.

2. Click unpin in the upper right corner of the tile.

 Note:

 If you do not see unpin in the upper right corner of the tile, an administrator has protected the tile to prevent it being unpinned.

To unpin an object from the home page while you are on a different page, select the pinned object and click **More Commands** > **Manage** > **Unpin from Home**.

Note:

Administrators can repin default tiles.

3. Finding data using Active Workspace

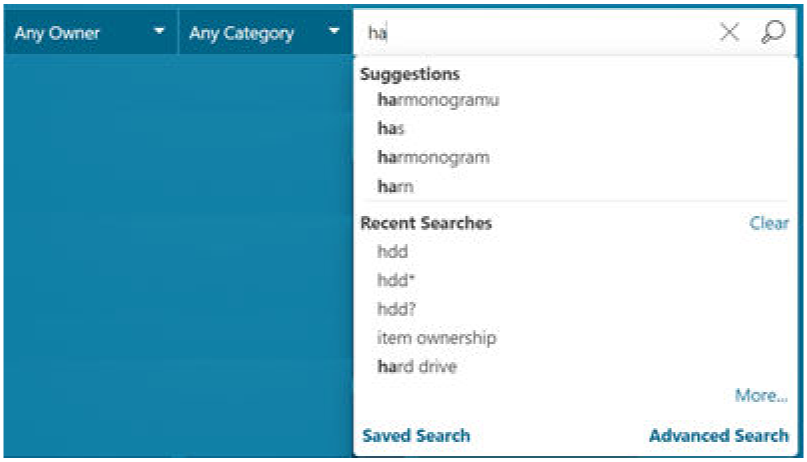
Searching for data

Throughout a product's life cycle, you need to keep track of multiple drawings, attachments, and item revisions. There is no need to remember folders or directories where this data is located because you can use several search and filter options to locate any data stored in Teamcenter.

In addition to locating all possible results, you can refine your search, save and pin your search, and export your results. During your project, you may want to see all matches that contain the name of the project you are working on. Or you may want to search the database for parts with a similar shape or size.

Return matches to a text search

Place your cursor into the **Search** box located in the top right corner in the application window.



- Begin entering your search term in the search box.

  Suggestions and **Recent Searches** are displayed according to what you type. Recent searches are saved during your current session unless you choose **Clear**.

  Index term stemming is applied to all indexed fields. For example, a search for **shielding tile** also returns objects with the string **shield tile** in any indexed field.

- Click **Saved Search** to access your list of saved searches.

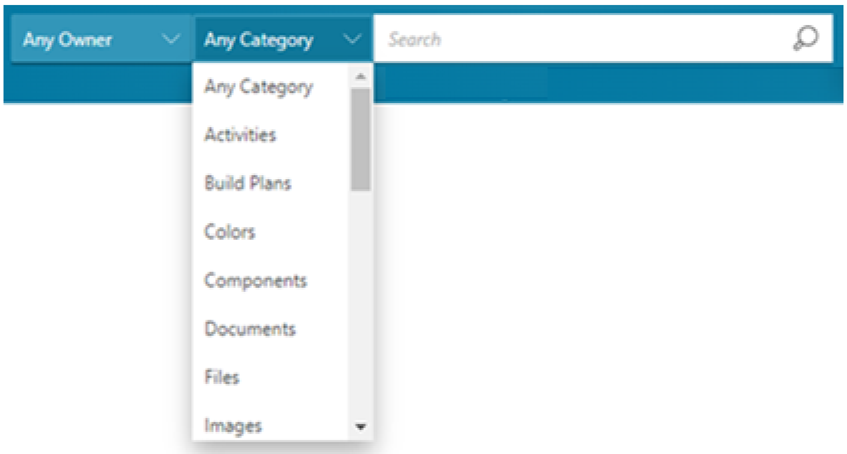
- Click **Advanced Search** to return matches using advanced search queries.

All search results appear in the **Results** tab.

To refine your search:

- Narrow the scope of your search with a prefilter.

  Prefilter lists are configured by your administrator. For example, you might see **Any Owner** and **Any Category** lists.

- **Refine your search** criteria using operators, keywords, and other techniques.

- **Ignore common words** in your search criteria.

Work with your search results:

- **Choose a view for your results**.

- **Filter your results**.

  Apply filters from a list of categories and properties. You can remove filters using the **breadcrumb in the header area**.

- Display results by category in a **chart**.

- Apply **highlights for matching search terms or use filter colors**.

- Save and pin your search criteria, including your filters and chart view, to use or refine later.

  You can pin the search and access it from your home page. You can also access your saved search from the **Saved** page in the **Search** header and share it with others.

- **Export your search results** to Microsoft Excel or Microsoft Word.

You can also **personalize your search settings** to change the behavior of the **Filters** panel and how results are displayed.

Return matches using advanced search

Your tasks may require you to search often and always against the same fields. For example, each week you may want to ensure that approved parts were not changed. You search for all objects in various projects that were modified the previous week with a **Release Status** of **Approved**.

Instead of typing your search criteria for multiple fields into the search box, you have the option of using **predefined queries** that provide you with just the fields you want to search against. For example, select a **query**, enter your search criteria into the fields for **Name**, **Description**, **Created After**, **Created Before**, and **Release Status**.

Several predefined queries are provided for your use. You can **work with** and **create queries**.

Select an option in **Display** to refine the list of queries:

- **All**: All predefined queries and queries you created.
- **Public**: Only predefined queries.
- **Private**: Only queries you created.

You can choose a search from **Preferred Searches** in the **Advanced Search** panel. Preferred searches are displayed first. You can add or remove a query by selecting it and clicking **Preferred**.

You can **refine your advanced search** using wildcard characters, delimiters, and cascading lists of values.

Find summarized answers of complex information using Teamcenter AI Chat

You may need to quickly access safety, compliance, regulation, and more information while working in Active Workspace. With Teamcenter Artificial Intelligence (AI) Chat, you can **ask questions** in a panel and receive summarized answers with source materials. Teamcenter AI Chat is enabled and configured by your administrator.

Receive targeted results using natural language search

You may need to quickly access specific information. With natural language search, you can **search using conversation language instead traditional syntax** to receive targeted, relevant results immediately. Natural language search is enabled and configured by your administrator.

Return matches with a similar shape and size

When building an assembly, you might want to search for existing components that match a similar shape or size. If the object is indexed for **Shape Search**, your search results can also display these similar objects.

Shape Search is enabled and configured by your administrator.

Organize your searches

You will likely use a combination of text searches and template searches to find the data you need. To organize, save, and share these searches in one place, use **active folders**.

Refining your search

You can refine your searches with operators, keywords, and other techniques to narrow your results.

- **Return matches with patterns using a wildcard**
- **Particularize matches using special characters**
- **Expand searches with Boolean operators**
- **Specify property searches**
- **Specify date searches**
- **Apply keywords to search criteria**
- **Ignore common words in searches**

Return matches with patterns using a wildcard

You can use the ***** wildcard to return all results matching the initial search term.

By default, the search adds an implied wildcard asterisk (*****) character to the end of each search term. Entering **HDD 0500** automatically performs a search for **HDD* 0500***. This search returns all results starting with **HDD** and **0500**, such as **HDD 050002** or **HDDA 050055**.

You can use the ***** wildcard to search for characters in individual search terms. Using ***** does not support search phrases as it does not apply to spaces between terms. For example, **fue*conomy** does not find **fuel economy**, but **fue* *conomy** does.

You can use the ***** wildcard with **NOT** to search for empty properties. For example, **NOT "Release Status":*** returns all matches without a release status.

You can use the ***** wildcard with **NOW** for date searches. For example, **"last modified date":[* TO NOW]** returns everything until the present day. **NOW** must be all uppercase.

Siemens Digital Industries Software recommends that the wildcard (*) be used cautiously for non-indexed structure search because it might adversely impact search performance.

Particularize matches using special characters

You can return exact matches using quotation marks (**" "**). Without quotation marks, index term stemming is applied to all indexed fields and the search returns matches with the string from the stem word in any indexed fields.

For example, a search for **"Shielding Tile"** returns objects with the string **shielding tile** in any indexed fields. A search for **shielding tile** also returns objects with the string **shield tile** in any indexed fields.

You can specify the matches returned by using the following special characters. Be sure to enclose your search criteria in quotation marks (**" "**).

( ) { } [ ] - :

Numerical value range searches can be inclusive **[ ]**, exclusive **{ }**, or mixed (**[}** or **{]**), using syntax similar to other property or date searches.

Expand searches with Boolean operators

You can use Boolean operators to expand searches by including associated terms or prohibiting specific terms.

The default Boolean operator applied for all keywords in a search term is set by your administrator.

Search for two terms

AND	**bolt AND nut** returns objects with the words **bolt** and **nut** in any indexed fields.

Prohibit a term from the search

NOT	**bolt NOT nut** (or **bolt –nut**) returns objects that contain **bolt** but do not contain **nut** in any of their indexed fields.

Search for terms with multiple associations

AND (OR)	**"Part revision" AND (Dan OR Sally)** returns objects that are a **part revision** or contain a **part revision** associated with users named **Dan** or **Sally**.

(AND) OR	**(chrome AND matte) OR aluminum** returns objects that either contain both **chrome** and **matte** together or **aluminum**.
AND AND (OR)	**"Dan Designer" AND "Engineering Group" AND (motor OR "main axle")** returns objects that contain both **Dan Designer** and **Engineering Group** in addition to **motor** or **main axle**.

Specify property searches

You can search for indexed properties of objects. You can specify property searches using the special characters listed in this topic.

Colon (:)	**owner:john** Search on indexed property values using the property display name. Display names must be separated from search values by the colon (**:**) character.
Quotation marks and colons ("":)	**"Group ID":engineering** Use quotation marks for display names with spaces and property values with spaces.
Quotation marks for property values with parentheses.	If the property is: **Name: (test)** Then enter the search criteria: **Name: "(test)"**
Numerical value range	**ID:[000001 TO 000050]** Search for a range of numerical property values using **TO** and **[ ]**. **ID: [000001 TO 000050] OR ID:[000075 TO 000100]** You can combine **date** range with other search tools for more precision, for example, **AND**, **OR**, and **" "**. Numerical value range searches can be inclusive **[ ]**, exclusive **{ }**, or mixed (**[}** or **{]**), using syntax similar to other property-specific searches.
Combine property and term searches	**"group id":engineering motor itemrevision** This search finds objects that have engineering as the group ID property and that have the words **motor** and **itemrevision** in any indexed fields.

Name-value property search

Your organization can create name-value properties to display name-value pairs in a tabular format. These name-value pairs represent characteristics not defined in the persistent properties for a business object.

Consider that your company has created a **MyNameValueProperty** name-value property. A search for **MyNameValueProperty.name:a5_part_id** returns everything with a **MyNameValueProperty** name-value property having a **a5_part_id** name.

MyNameValueProperty.name:a5_part_id AND MyNameValueProperty.value:000075 returns everything with the **MyNameValueProperty** name-value property having a **a5_part_id** name with a value of **000075**.

When you search for the value of the name-value property, you *must* use the **AND** operator or separate the name expression and the value expression with a space. While you can search for the **name** portion of a name-value property by itself, you cannot search for the **value** portion by itself.

You cannot use the **OR** operator with the **value** portion. The default operator is always **AND**.

The provided name and value expressions must be in pairs and in order. That is, each value expression must be preceded by its corresponding name expression. A name expression cannot be supplied after its value expression.

Valid: **MyNameValueProperty.name:a5_part_id AND MyNameValueProperty.value:000075**

Invalid: **MyNameValueProperty.value:000075 AND MyNameValueProperty.name:a5_part_id**

All other search operators apply. For example, you can search for display names using **" "** and numerical ranges using **[TO]**, and perform wildcard searches with ***** (the asterisk).

Specify date searches

You can specify date searches using the following special characters.

Search date range

Date searches are property specific, and the search format is year, month, and day, as in **2015-08-24**.

Date range searches can be inclusive **[ ]**, exclusive **{ }**, or mixed (**[}** or **{]**}, using syntax similar to other property-specific searches.

Date searches can use the asterisk (*) wildcard or the **NOW** keyword, which represents the current date and time in minutes and seconds and can include other properties.

Inclusive date search: **"Date Modified":[2015-08-24 TO 2015-08-26]** returns everything from August 24 to August 26, including August 24 and August 26.

Exclusive date search: **"Date Modified":{2015-08-24 TO 2015-08-26}** returns everything from August 25, excluding August 24 and August 26.

Mixed date search: **"Date Modified":{2015-08-24 TO 2015-08-26]**, returns everything from August 25 to August 26, excluding August 24 and including August 26.

Date search with wildcard (*) and NOW	**"Date Modified":[* TO NOW]** returns everything until the present day (**NOW** must be all uppercase).
Mixed date searches with NOW	**"Date Modified":{2015-08-25 TO NOW] "date released":{2015-08-25 TO NOW] name:screw** **"Date Modified":{2015-08-25 TO NOW] bolt**
Date search with time	You can include the time with the date value, in the format year-month-day-hours-minutes-seconds: *"YYYY/mm/ddTHH:MM:SS"* Be sure to enclose the date and time value within quotation marks, for example, **"2012-12-11T23:59:59"** The date and time format is supported by simple search, name-value property search, and table property search.

Apply keywords to search criteria

You can apply supported keywords to your search criteria to return specific results.

Search objects owned or last modified by the logged-in user	**Owner:$ME** returns results for all objects owned by the logged-on user. **"Last Modifying User":$ME** returns results for all object modified by the logged-on user.
Search objects for your group	**"Group ID":$MY_GROUP** returns results for objects with your group in the group ID property.

or your project	**"Projects":$MY_PROJECT** returns results for objects with your project ID.
Search a time frame based on days	**"Creation Date":$TODAY** returns results for all objects created today. **"Date Modified":$YESTERDAY** returns results for all objects modified yesterday. **ItemRevision AND "Date Modified":$LAST_7_DAYS** returns results for all item revision objects modified in the last seven days. You can use any numerical value.
Search a time frame based on weeks	**"Date Modified":$THIS_WEEK** returns results for all objects modified in the current week. **ItemRevision AND "Creation Date":$LAST_WEEK** returns results for all item revision objects created in the last week. The week keyword does not support a numerical value.
Search a time frame based on months	**"Creation Date":$THIS_MONTH** returns results for all objects created in the current month. **Owner:$ME AND "Date Modified":$LAST_MONTH** returns results for all objects owned by the logged-on user and modified in the last 30 or 31 days, depending on the month. **"Last Modifying User":$ME AND "Date Modified":$LAST_3_MONTHS** returns results for all objects last modified by the logged-in user and modified in the last three months. You can use any numerical value.
Search a time frame based on years	**"Creation Date":$THIS_YEAR** returns results for all objects created in the current year. **ChangeRequestRevision AND "Creation Date":$LAST_YEAR** returns results for all change request revision objects created in the last year. The year keyword does not support a numerical value.

Ignore common words in searches

If your search phrase contains a common word, such as **the**, **and**, **for**, or **a**, it may be ignored in your search criteria. Your administrator can configure which words are interpreted as common words.

If common words occur in a search phrase inside quotation marks, you may not find an exact match. Using quotation marks around your search phrase has the following effects:

- If a common word occurs between keywords in a search phrase enclosed in quotation marks, it is replaced by a wild card in the query.

  For example, if you search for **"Parts and sprockets"**, search checks if a single property contains both **Parts** and **sprockets**. Your search results might include **Parts sprockets** and **Parts large sprockets**.

  If you search for **Parts and sprockets** without quotation marks, search checks if multiple properties match **Parts** or **sprockets** and returns the object only if it matches both. Your search results might include an object containing a property, **Parts and sprockets**. Or, your search results can include an object containing the property **Parts** and another property, **sprockets**.

- If a common word occurs at the beginning or end of a search phrase inside quotation marks, it is ignored.

  For example, if you search for **"The parts and sprockets for"**, **The** and **for** are ignored.

Return matches using advanced search

Advanced search provides predefined queries that help you search quickly by displaying only the fields you need. Use an advanced search query if you often search against the same set of fields.

For example, maybe you often search for item revisions with different item IDs, created after a certain date, and with a specific **Release Status**. You can use the **Item Revision** query and enter your search criteria into the **Item ID**, **Created After**, and **Release Status** fields.

To access all available advanced search queries, click **Advanced Search** from the **Search** box or from the **ADVANCED SEARCH** tile to open **Advanced Search**. The most recently used query is displayed.

To use advanced search:

- Several predefined queries are provided for your use. You can work with and create queries.

  Select an option in **Display** to refine the list of queries:

  - **All**: All predefined queries and queries you created.
  - **Public**: Only predefined queries.
  - **Private**: Only queries you created.

- Prioritize your frequently used advanced search queries by assigning them as **Preferred**.

- Enter any additional criteria to narrow the results.

- Press **Alt +Enter** to add a line to a search criteria field. Press **Enter** to run the search.

- **Refine your advanced search** using wildcard characters, delimiters, and cascading lists of values.

When viewing your results you can:

- **Choose a view for your search results**.
- **Export your search results** to Microsoft Excel or Microsoft Word.
- Save and pin your search criteria to use later.

  Access saved searches from your home page or from the **Saved** page of the **Search** header.

Working with advanced search queries

Using custom advanced search queries increases the efficiency of your searches by narrowing your criteria and expediting your results when you often search the same set of fields.

Queries you created and queries provided by your administrator, known as predefined queries, are available in the list. Select an option in **Display** to refine the list of queries:

- **All**: All predefined queries and queries you created.
- **Public**: Only predefined queries.
- **Private**: Only queries you created.

You can also search the list to find a particular query.

In **Query Builder**, you can do the following:

Action	Description
Create a query	You can **create a query** from scratch or using an existing query as a starting point. Select a **Search Type** from the available list of business type objects, such as **Item Revision**. Build queries by selecting criteria from the following available lists to add and customize clauses: • **Standard**: Properties defined on the search type, properties inherited from parent types, or referenced properties. • **Relations**: Properties that are not defined on the search type, but associated to the search type through a relation. Run-time properties, table properties, and compound properties are not supported.
Edit a query you created	Select the query and click **Edit**.

Action	Description
Run a search using a query	Select the query and click **Preview Query**. Search results are returned in the same manner as running the search query in Advanced Search.
Delete a query you created	Select the query and click **More Commands** > **Edit** > **Delete**.
Import a query	You can import a query saved in an XML file into Active Workspace.
Export a query	You can export a query to an XML file for sharing.

Create an advanced search query

Create custom advanced search queries in Active Workspace to increase the efficiency of your searches by narrowing your criteria and expediting your results.

Procedure

1. Click the **Query Builder** tile on the home page.

2. Choose one of the following ways to create the query:

   - To start from scratch:

     - Click **Create Query**.

     - Enter a **Name**, and optionally, enter a **Description**, and select a **Search Type**.

     - Click **Create**.

   - To start with an existing query:

     - Select an existing query and click **Save As**.

     - Enter a new **Name**, and if applicable, update the **Search Type** and **Description**.

     - Click **Save**.

   The new query appears in the list.

   If the **Search Type** is **Item Revision** or a subtype of **Item Revision**, you can select a revision rule in **Properties** to be included in your query.

3. In **Criteria**, select **Add Clause**.

4. In the **Add Clause** panel, select **Standard** or **Relations** to display the applicable criteria.

   - **Standard**: Refers to properties defined on the search type, properties inherited from parent types, or referenced properties.

   - **Relations**: Refers to properties that are not defined on the search type, but associated to the search type through a relation.

   To learn more about properties, review the Teamcenter data model.

5. Find your desired properties. You can:

   - Search for specific properties. Parent properties must be expanded in the list for a child property to appear in the search results.

   - Choose to exhibit **Display Names** or **Internal Names** for the properties.

   - Choose to display **Type Properties**, which are those defined on your search type, or **All Properties**. For unreferenced properties, you can select which type you want the property to reference.

6. Select your criteria and click **Add** after each selection.

7. After you have added all desired criteria, click **Close**.

   The **Criteria** table may be edited.

8. Customize your query clauses in the **Criteria** table using Boolean rules, **Operators**, and **Default Values**.

Boolean rules	Create a custom query by combining clauses using the Boolean rules **AND**/**OR**. When you use **AND** clauses together, both must be satisfied to return a match. When you use **OR** clauses together, either can be satisfied to return a match.
Property Internal Name	View the internal name of the property.
Localization Key	View the localization key used to look up user entry names. The value in this column can be modified and must be unique for each instance of the same property internal name. The localization key-value pairs are defined in **qry_user_entry_names_locale.xml**.
Display As	View the property names as they appear in the search form.
Operator	Specify one of the following logical operators in each search clause. **=** Equal to **!=** Not equal to

	>	Greater than
	>=	Greater than or equal to
	<	Less than
	<=	Less than or equal to
	IS_NULL	Reference property value is not set (blank). You may also specify **=$NULL**.
	IS_NOT_NULL	Reference property must have a value. You may also specify **!=$NULL**.
Default Value	Enter a default value for a search clause. If you selected **IS_NULL** or **IS_NOT_NULL** as the operator, the default value cannot be edited. For date properties, you can select a date and time as the default value. You can use one of the following variables as a default value for the end user who is running the query. • **$USERID** • **$USERNAME** • **$GROUP** Caution: Do not use multiple variables for the default value as the required delimiters may impact the query.	

9. Click **Save**.

Export an advanced search query

You can export a query to share it with other Teamcenter sites.

Procedure

1. Click the **Query Builder** tile on the home page.

2. Select a query.

3. Click **Export Query**.

   The exported file is downloaded.

Import an advanced search query

You can import existing query data that is saved in an XML file.

Procedure

1. Click the **Query Builder** tile on the home page.
2. Click **Import Query** .
3. Click **Choose File**.
4. Select the applicable *.xml* file.
5. Click **Open**.
6. Click **Import.**

Refining your advanced search

You can refine your advanced search to obtain the most accurate results.

- Replace unknown characters with wildcards in an advanced search
- Return matches for multiple criteria using delimiters with advanced search
- Narrow your advanced search with cascading lists of values

Replace unknown characters with wildcards in an advanced search

Advanced searches are predefined queries. The more criteria you enter, the more specific your search results become. Advanced searches are not case sensitive.

You can use wildcard characters, the asterisk (*****) and the question mark (**?**), to match single or multiple characters in specific positions of a search string.

Asterisk *	The asterisk searches for the root of a word followed by one or more characters.
Question mark ?	The question mark searches for the root of a word with the question mark as a substitute for another character. For example, a search for **Anders?n** might return **anderson**, **Andersen**, and **andersin**.

You can apply the **$NULL** keyword to a particular search criteria field to return matches with no value for that attribute.

Return matches for multiple criteria using delimiters with advanced search

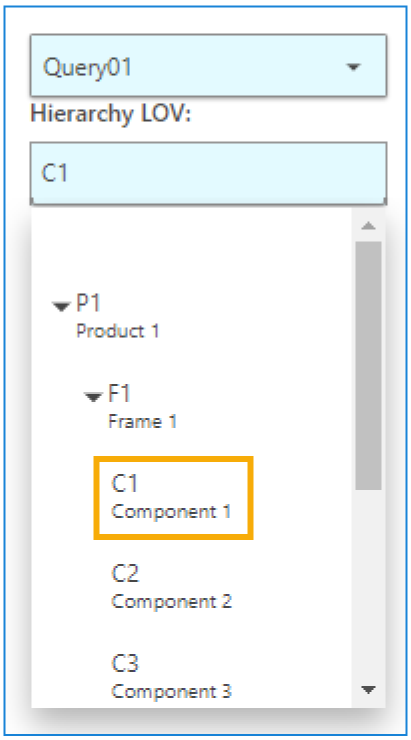
You can search for multiple pieces of information at the same time by using delimiters. The default delimiters are **SEMICOLON**, **NEWLINE**, and **TAB**. Your administrator can add or remove available delimiters.

To use an enabled delimiter character, insert it between multiple search criteria. For example, a search for **HDD-0548;HDD-0544** using the **SEMICOLON** delimiter displays results for both criteria in the same search results table.

Narrow your advanced search with cascading lists of values

You can narrow the results of your advanced search by selecting a specific value for the property.

If a property has a cascading list of values (LOVs), you must expand all parent values and select a child value. For example, to search for the component **C1**, expand **P1** and **F1** and select **C1**.



Finding summarized answers of complex information using Teamcenter AI Chat

While working in Active Workspace, you may need to quickly access your Teamcenter information, including safety, compliance, regulation, or other information. If configured by your administrator, Teamcenter Artificial Intelligence (AI) Chat allows you to ask questions and provides summarized answers with source materials. These answers are provided from file contents and requirements that are both indexed and embedded and to which you have access.

You can access Teamcenter AI Chat in a panel at any time using the **Chat** in the global header.

In the **Chat** panel, use **Knowledge Source** to select one or more knowledge sources that apply to your search.

Use natural language to type your question and click **Submit** or press **Enter** to run the search.

Teamcenter AI Chat searches your knowledge source and provides a summarized answer to your question and the relevant source materials.

You can **Copy** the summarized answer for future use.

You can click on the applicable link to open the source material in Active Workspace.

Receive targeted results using natural language search

While working in Active Workspace, you may need to quickly access specific information. If configured by your administrator, natural language search allows you to search using conversational language instead of the traditional syntax to receive targeted, relevant results immediately.

You can use natural language search at any time by clicking **Natural Language** next to the global search box.

In the global search box, enter your search criteria using natural language. Search criteria should include indexable properties.

If you have a prefilter selected, it will be honored in the search results unless the search criteria you entered is contradictory.

You can hover over the number of search results found for information on how natural language search interpreted your query.

Examples

The following shows the difference between using syntax and using natural language to search for all item revisions modified within the dates specified, owned by the user, with a released status.

- Using syntax:

  itemrevision **AND "Date Modified":[***2024-01-01 TO 2024-09-30***] AND owner:***me* **AND "Release Status":***Released*

- Using natural language search:

  My released item revs modified from Jan to Sept this year

The following list gives several examples of searching using natural language:

- If you search for **My change notices**, natural language search returns results in which the **Owner** is your user ID and the **Type** is **Change Notices**.
- If you search for **Released part revision**, natural language search returns results in which the **Release Status** is **Released** and the **Type** is **Part Revisions**.
- If you search for **Harness connectors weighing < 0.1**, natural language search returns results in which the **Type** is **Harness connectors** and the **Weight** is less than **0.1**.
- If you select **Part Revision** in the **Category** prefilter and search for:
  - **Item revisions modified last year**, natural language search ignores the prefilter and returns results in which the **Type** is **Item revisions** and the **Modified date** is within the last year.
  - **Modified last year**, natural language search honors the prefilter and returns results in which the **Type** is **Part revisions** and the **Modified date** is within the last year.

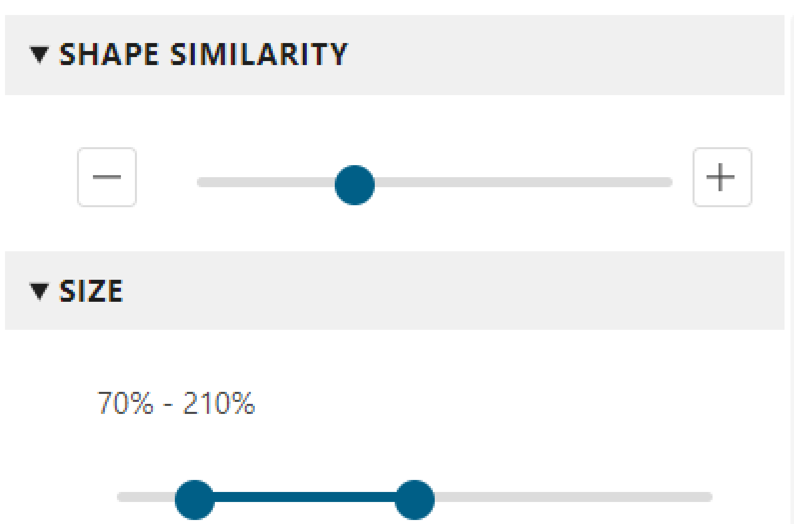
Return matches with similar shape and size

If shape search is configured, you can activate it prior to performing a search by clicking the **SHAPE SEARCH** tile. To activate it after a search, select **Shape** in the header area. If you are in the **Purchasing User** role, you can also access shape search as the home page in the **Pricing Comparison** workspace.

In **Shape Search**, select an object indexed for shape search and click **Search Similar**.

Depending on the configuration set by your administrator, shape search results may include item revisions, design revisions, and part revisions. The **Shape Similarity** column indicates if the result is **Identical** (98-100%), **Very Similar** (80-98%) or **Similar** (less than 80%).

In the **Filters** panel, you can choose to apply similarity and size filters to your shape search results.



- The **Shape Similarity** slider specifies the level of similarity for matching results. Moving from identical to similar broadens the search and retrieves more results.

- The **Size** slider specifies the minimum and maximum size for matching results. Size is a percentage of the referenced object and not a specific dimension.

You can **export** your shape search results from the table view.

Work with search results

When you enter a search term in the **Search** box in the global header, the indexing engine finds objects relevant to your input and returns a listing of these objects. This listing is called **Search Results**. This topic explains how you can view and work with the search results.

Result views

- View your results in a list, a table, or by images.

- In table view, you can:

  - Modify how to display tables.

  - Organize your view using the **arrange** panel.

  - Sort any column by ascending or descending values. Click on the column header and select **Sort Ascending** or **Sort Descending**.

    Sorting on columns for non-indexable properties may be limited based on the threshold of results configured by your administrator.

    Column sorting is not supported for all columns in advanced search.

  - Filter any column in table view. Click the column header to view the **filtering options**.

    Columns for non-indexable properties do not support facet filtering. Filtering on columns for non-indexable properties may be limited based on the threshold of results configured by your administrator.

    Column filtering is not supported for advanced search.

- Switching between views preserves the sort order and selected items in your results. If you enter a new search, the sort order returns to the default order.

- In list view, snippets may show the location of search terms within file content for returned items. The snippet is displayed as a phrase under the object. Snippets provide assistance in determining where the search term is matched, especially if the displayed object name or description has no match. Snippet availability is configured by your administrator.

Toolbars

From the search results panel toolbar, you can perform a variety of actions.

- For all search types, you can click to save your search to reuse later.
- For searches using the search box :
  - Click **Filters** to apply property values to refine the results.
  - Click to choose:
    - **Highlighting** to highlight the search term in the results. Highlights are available for keywords and property values.
    - **Color Filtering** to associate colors with the most common filter values. Some search results objects also display the corresponding filter value color in the results list.
  - Click **Search Settings** to configure your personal search preferences.

> Tip:
>
> Depending on your display resolution and panel sizing, some command icons may be hidden. Click **More commands** ••• on any toolbar to reveal hidden commands.
>
> Explore the primary toolbar to display commands that perform actions or open associated task panels.

Column sorting and filtering

You can sort any column in table view by ascending or descending values. Click on the column header and select **Sort Ascending** or **Sort Descending**.

You can filter any column in table view. Click the column header to view the filtering options.

Columns for non-indexable properties do not support facet filtering.

Column filtering is not available for advanced search.

Filter search results

On the search **Results** page, you can apply available filters to narrow your search results using the **Filters** panel.

Display or close the **Filters** panel by clicking **Filters** . Selected filters are also displayed in the **search breadcrumb**.

Filter behavior is initially configured by your administrator, but you can change a few **filter panel settings** yourself.

Tips for using filters

- Search results are refreshed automatically when a filter is selected. To change this behavior, you can display the feature on the **Filters** panel by clicking **Search Settings** and selecting **Show Auto-update Filters Option**.

  - If **Auto-update Filters** is selected on the **Filters** panel, search results continue to refresh automatically when a filter is selected.

  - If **Auto-update Filters** is not selected on the **Filters** panel, multiple search filters may be selected. You can hold **Shift** and select the first and last options to select multiple filters in a row. Click **Filter** to refresh the search results.

- You can search the list of properties by entering text in **Filter By Property**. You can also search the list of property values using the search box for the filter.

- If you run the search again, filters and in-content search terms are cleared. If you save your search, the selected filter values are preserved.

- The **More** and **Less** commands may be displayed at the end of a property list. You can expand or reduce the length of the list.

- If **Color Filtering** is selected, colors are associated with objects in the results that match the most common filter values.

  Some objects may not display the corresponding filter value color. Typically, this happens when the properties are not defined in the data model template.

- The bar chart appears in all results views when no search result item is selected.

  Apply a filter to the results from the **Chart by** list, which displays the results by property value, or from the **Filters** panel. The chart and the search results lists display the same color code for a selected filter property.

  The filter selections persist for the chart throughout the session unless you change them. You can reset the default behavior by logging off and logging on again.

- If you run a saved search, you can filter the **Updated Results** to the objects that are **New**, **Modified**, or **Unchanged** since the last time you ran the search.

Filtering by dates and ranges

Filtering dates

When a property displays date boxes, you can enter the start and end dates. Dates take the form *DD-MMM-YYYY*, for example, **29-Aug-2016**. An empty value means the date range is open.

When the filter displays the dates, they are grouped as follows:

If there is:	The date filters are grouped in:
More than one year of data	One-year increments
Between one month and one year of data	One-month increments
Between one week and one month of data	One-week increments
One week of data	One-day increments

When you click on a date range, the date filters change to the next filter grouping.

Your administrator specifies which day of the week is the first day.

Filtering numeric ranges

When a property displays numeric range boxes, you can enter start and end numeric range values.

Numeric values take the form *From- To*, for example, **.1- 1.5**. An empty value means the numeric range is open.

Filtering Multi-Site search results

If Multi-Site Collaboration is enabled at your site, you can filter Object Directory Services (ODS) published record objects from multiple locations. At Multi-Site locations, the **Filters** panel displays the **Search Site** property, where you can filter the search results to either **Local** or **Remote**. The **Search Site** is also displayed in the search breadcrumbs.

- **Local** displays the results that are indexed at the local site, which includes objects that were indexed from remote sites.

  If there are no published records available, then only local results are displayed.

- **Remote** displays the results that are indexed only from remote sites. Choosing **Remote** lets you choose results specific to the sites listed in the associated **Remote Sites** filter.

Personalize your search settings

You can configure your personal search preferences. In the results panel, click **Search Settings** to view the configurable areas.

FILTERS section

Configures the **Filters** panel behavior.

Hide filters with only Unassigned values

Hides filters with values that are not assigned to any of the results. Clear the check box to display filters that have no assigned values in the search results.

Limiting expanded filters takes precedence over hiding unassigned filters. When you hide unassigned values and also specify a list of filters for **Limit filters to expand**, you may see unassigned values for filters in the **Filters to Expand** list.

Sort filter values

By count sorts the filter value lists by total occurrences.

Alphabetically sorts the filter value lists in alphabetical order.

Sort date-filter values

Latest First sorts the date-filter value lists chronologically with the latest first.

Oldest First sorts the filter value lists chronologically with the oldest first.

By count sorts the date-filter value lists by total occurrences.

Display qualified group names

Displays names in the **Group ID** filter category according to the group hierarchy, including subgroup names. For example, if you have an **Engineering** group with subgroups for United States and Europe, the **Group ID** filter category may show values for **Engineering**, **Engineering.US**, and **Engineering.Europe**

If you change this setting after running a search, you must remove any selected **Group ID** filters from the breadcrumb and reapply the filters for accurate results.

If you change this setting after saving a search or creating an active folder, including project folders, you must remove any selected **Group ID** filters and reapply the filters for accurate results.

1. Access the saved search or folder.

2. Click the **Group ID** filter.

3. Click **Edit**.

4. Remove the selected filter and reapply the filter.

5. Click **Save**.

Show Auto-update Filters Option

Displays the **Auto-update Filters Option** on the **Filters** panel.

If **Auto-update Filters** is selected on the **Filters** panel, search results continue to refresh automatically when a filter is selected.

If **Auto-update Filters** is not selected on the **Filters** panel, multiple search filters may be selected. Click **Filter** to refresh the search results.

Open Filter Panel automatically with Search

Opens the **Filter** panel automatically with search results.

Show the more project data folder

Organizes all data that is assigned to a project but not applicable to the available object type folders into a **More project data** folder in the project folder.

Filter Wildcard

Choose a wildcard (*) method to apply when searching property values.

Both leading and trailing wild cards applies the wildcard characters to the beginning and end of your search term.

No wild card searches only for exact matches to your search term.

Trailing wild card applies the wildcard to the end of your search term.

Leading wild card applies the wildcard to the beginning of your search term.

Display filters as

You can specify whether filters display as a list or in groups. The list of available filters and initial settings are configured by your administrator.

List displays all available filters in a list.

Group organizes filters inside predetermined groups. Groups of filters are configured by your administrator.

Expand

When filters are selected to display as a **List**, you can specify which filters are expanded. When filters are selected to display as a **Group**, you can specify which groups are expanded.

Selected Filters allows you to select specific filters from the available list to be expanded. By default, the **Category** and **Type** filters are always expanded.

All Filters expands all filters in the list.

Selected Groups allows you to select specific groups to be expanded from the available list.

All Groups expands all groups in the list.

Update Filter Values

On "Enter" Key Press runs the filter search after you enter text and press **Enter**.

As you type displays matching filter values as you enter text.

RESULTS section

Configures search results behavior.

Include results from files

Includes results found in the file content of returned items.

Clear the check box to display only matches found in the item name.

Show text snippet with results

Displays a snippet of the text matched from the file content.

This option is only available if Include results from files is selected.

> Tip:
>
> Use **Highlighting** on the results panel toolbar to display or hide highlighting on matches in the results list.

In summary view

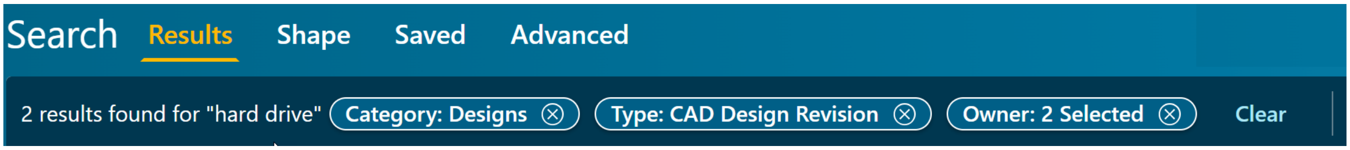
Show summary of first result displays information about the first returned result in the right pane.

Show chart of results displays the values for the chart filter category in the right pane.

Work with breadcrumbs

Breadcrumbs display information about results for **all search types** in the page header area. Breadcrumbs provide a quick view of all selected filters or applied criteria for your search results.

Work with search breadcrumbs



The search **Results** page displays the filters that are applied to search results. Related filter values are grouped together in the breadcrumb, regardless of the order in which you choose them. Search criteria entered in **Find in this content** appear in the breadcrumb.

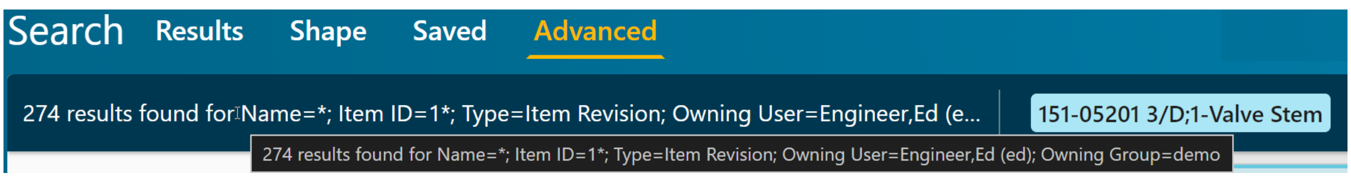
When several filters are selected, you can click **More** at the end of the breadcrumb to display additional selected filters.

The lock icon appears in the breadcrumb if there are unreadable results. Hover over the icon to view the number of unreadable results.

Click ⊗ next to a filter to remove it.

Click **Clear** at the end of the breadcrumb to remove all filters.

Work with advanced search breadcrumbs



The advanced search results page displays the criteria that are applied to advanced search results.

Hover over the breadcrumb to display all criteria applied to the advanced search results.

> Note:
>
> The applied criteria cannot be edited in the breadcrumb.

Saving searches

All your searches, including advanced searches, can be saved and appear on the **Saved** search page available from the header. From the results toolbar, click **Save Search**.

Saving your searches has many benefits:

- Save all your search criteria to use later.

- Share saved searches with other users.
- Pin saved searches to your home page for quick access.
- Update saved searches when your criteria changes.
- From **Advanced** search, you can choose from a list of preferred searches that you tag as frequently used.

> Tip:
>
> Even if a search is not saved, you can choose a search from the **Recent Searches** list. These are saved by the system during your current session.

Save a search

You can save a keyword search or an advanced search to access the search at another time.

Procedure

1. Once you have run a search, click **Save Search**.
2. In the **Save Search** panel, enter a **Name** for the search.
3. (Optional) Select **Allow others to view** if you want to allow other users to view your search.
4. (Optional) Select **Pin to Home** to pin the search to **Home** as a tile.
5. Click **Save**.

Retrieving a saved search

You can access a saved search multiple ways:

- Click the **SAVED SEARCHES** tile on the home page to open the **Saved** search list.
- Click the **Saved** page on the **Search** header to open the **Saved** search list.

You can refine the list using **Filters**.

Select a search from the list to display its information.

- **Overview** displays key information about the selected search, including its search criteria and owner.

  Click on the values in **Criteria**, **Filters**, or **Chart By** to access **Rules**.

The results are displayed in the **CONTENTS** section.

In the **CONTENTS** section, you can **Export to Excel**.

- **Rules** displays the current search criteria and the returned results. You can set or update the search criteria rules if you have permission.

Run a search by clicking **Open**.

When you run a **Keyword Search**, the **Filters** panel includes an **Updated Results** filter. You can choose objects that are **New**, **Modified**, or **Unchanged** since the last time you ran the search.

Work with your saved search

Once you have saved your search, you can modify it in several ways. You cannot modify saved searches that were not saved by you.

Edit your saved search

1. Select the saved search and click **More commands** > **Edit** > **Summary**.
2. Make your updates and click **Save**.

Pin or unpin your saved search

To pin your saved search to a tile, select the saved search and click **More commands** > **View** > **Pin Search**.

Unpin your saved search in one of the following ways:

- Select the saved search and click **More commands** > **View** > **Unpin Search**.
- From the home page, right-click the search tile to display controls on the corners. Click **Unpin**.

Delete your saved search

To delete a saved search that you created, select the saved search and click **More commands** > **Edit** > **Delete**.

Export search results

From the **Table** view of your search results, you can export rows to Microsoft Excel or Microsoft Word.

Activate **Selection Mode** on the results panel toolbar. You can also **Select All** or **Clear Selections** using .

1. When your items are selected, choose **More commands** ••• > **Import/Export** > **Export** .

2. In the **Export** panel, choose how to export your search results.

As Shown	Exports the results to Microsoft Excel. The displayed columns and sort order are applied to the output. **All Results** exports the entire list up to the maximum number configured for your site, regardless of what is selected. Choosing all results may include results not yet displayed. **Selected Results** exports selected rows.
Template	Exports the results to Microsoft Excel or Microsoft Word, and your selected view and template are applied to the output. **All Results** exports the entire list up to the maximum number configured for your site, regardless of what is selected. Choosing all results may include results not yet displayed. **Selected Results** exports selected rows. Both **Excel** and **Word** export the selected results using a specified view and template. The **Template** option is not available for shape search results.

3. Click **Export** and provide a location to save the file.

Organize searches with active folders

View active folders

Active folders save predefined search criteria and return the latest available matching results. You can create search criteria for active folders that generate results automatically. Then you can navigate, organize, and share these active folders.

You can create a hierarchy of related active folders to group similar searches together. A new active folder adopts the criteria of its parent by default. You can create a parent active folder with common search criteria and then refine this criteria for a set of child active folders.

Find your active folders

Open **Explorer** from the global navigation or from the **EXPLORER** tile on the home page. By default, **Active Folders** contains the **Recently Modified** active folder with sample searches in nested folders:

By Me	Returns your recently modified data. The criteria and the results are displayed in the **Overview**.
By My Group	Returns your group's recently modified data. The criteria and the results are displayed in the **Overview**.

If you are listed as the **Owner** of the folder, you can update the **Name** and **Description** of the active folder by clicking **Edit**.

Review and customize your active folders

When you select an active folder, the work area displays information about a selected folder.

Overview	Displays key information about the selected active folder, including its search criteria and owner. The results are displayed in **CONTENTS**. In **CONTENTS**, you can **Export To Excel**.
Rules	Displays the current search criteria and the returned results for the folder. You can set or update the search criteria rules if you have permission.
Shared With	Set or update with whom you want to share an active folder, if you have permission. You can filter the list, select multiple entries to add to the list, or remove entries from the list.

Create an active folder

You can create an active folder several ways. The active folder is created as a child of your current folder selection. By default, the active folder inherits the search criteria of its parent and the parent folder no longer retains this search criteria. You can then further refine the active folder's search criteria and add other child folders.

Add an active folder

1. In **Explorer**, select an active folder.

2. Click **Add Active Folder**.

3. Enter a name for the active folder in the **Name** field.

4. Optionally, you can enter a description for the active folder in the **Description** field.

5. Click **Add**.

   If the new folder is a child, it inherits the parent folder settings.

Create an active folder template

1. In **Explorer**, select an existing active folder.

2. Click **More commands** ••• > **Import/Export** > **Export Active Folder as Template**.

   This action creates an XML file containing the folder's hierarchy, rules, and sharing information.

Import an active folder

1. In **Explorer**, select an existing active folder.

2. Click **More commands** ••• > **Import/Export** > **Import Active Folder**.

3. Select an active folder XML file with a folder definition, including hierarchy, rules, and sharing information.

4. Click **Import**.

   You can also import an active folder that is not shared with you. If you run the search, user permissions are applied to the results and may not return what you expect.

   If you import an active folder more than once but to a different location, the new folder is a copy of the previously imported folder. They are synchronized in the background, and changes made to one folder are made to the other.

Update the rules of an active folder

When a new active folder is created, it inherits the search rules from the parent folder. In the **Rules** tab, refine the rule using the work area toolbar for an active folder. A change affects only the selected active folder. The action has no effect on any other folder in the hierarchy.

Procedure

1. Click **Edit** to refine an existing rule or replace it.

2. Select **Keyword**, **Advanced**, or **Saved** search.

3. Enter any applicable search criteria.

4. Click **Search**.

5. Click **Save** to save your changes.

Share an active folder

If you have permission, you can share an active folder. You may share both **Organization** and **Projects** choices for a single active folder. Sharing permissions determine whether someone can make a change to a shared active folder. The owner is always displayed for a shared folder. If the owner is a group, you must be a member of the group to make a change.

Procedure

1. Click **Shared With** and choose **Organization** or **Projects**.

2. Enter a search term and click **Search** to see a list of matches.

   If you choose a category, nested children are included.

3. Click **Add** ⇨ and **Remove** ⇦ to edit the items in the **SHARED WITH** list.

Your selections are saved automatically.

4. Working with data

Creating and revising data

Introduction to objects and object types

Object is a generic term used to describe any part, design, document or other entity that may be stored in your system.

As you work, you see the thumbnail images for different object types. For example:

Image	Object type
	Folder
	Item Revision
	Document

If you don't recognize an icon, you can open the object and see the **Type** in the **PROPERTIES** section.

Note:

To mark an object as a favorite, open the object and select **Manage** > **Add To Favorites**. This places a link to the object in your **Favorites** folder, accessible from the **EXPLORER** tile on the Home page.

How items and item revisions work with Favorites and the home page

You will see different behavior for **Favorites** and **Pin to Home** based on the current revision rule of the user session and whether you add/pin an item or an item revision.

Favorites with items and item revisions

What you see when you favorite an item or item revision depends on three rules.

If:	Then:
1. You add an item to **Favorites**.	**Favorites** will display the *configured* item revision.
2. You add a *configured* item revision to **Favorites**.	**Favorites** will display the *configured* item revision.
3. You add a *superseded* item revision to **Favorites**.	**Favorites** will display the *superseded* item revision.

Let's look at a few examples to see how this works with the following scenario.

Item	026355	
Item revision	026355 revision A	(superseded revision)
Item revision	026355 revision B	(superseded revision)
Item revision	026355 revision C	(configured revision)

Revision rule = Latest Working

	If you add this to Favorites.	Then this is what you see in Favorites.
Example 1	Item- 026355	Item revision- 026355 revision C (the *configured* revision)
Example 2	Item revision- 026355 revision C (the *configured* revision)	Item revision- 026355 revision C (the *configured* revision)
Example 3	Item revision- 026355 revision C (the *configured* revision) and then make a revision D.	Item revision- 026355 revision D (the new *configured* revision)
Example 4	Item revision- 026355 revision A (a *superseded* revision)	Item revision- 026355 revision A (a *superseded* revision)
Example 5	Item revision- 026355 revision B (a *superseded* revision)	Item revision- 026355 revision B (a *superseded* revision)

Remove from Favorites

You open either the item or the *configured* item revision to remove the *configured* item revision from **Favorites**.

You open the specific *superseded* item revision to remove it from **Favorites**.

Pin to Home with items and item revisions

Pin to Home uses the same rules as **Add to Favorites**.

Let's look at a few examples to see how **Pin to Home** works with the following scenario.

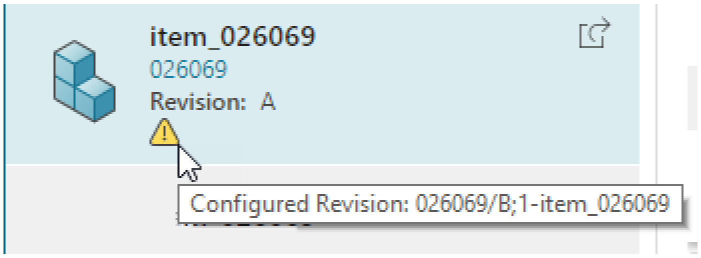
Item	026355	
Item revision	026355 revision A	(superseded revision)
Item revision	026355 revision B	(superseded revision)
Item revision	026355 revision C	(configured revision)

Revision rule = Latest Working

	If you pin to home	Then this is what you see on the home page.
Example 1	Item- 026355	Item revision- 026355 revision C (the *configured* revision)
Example 2	Item revision- 026355 revision C (the *configured* revision)	Item revision- 026355 revision C (the *configured* revision)
Example 3	Item revision- 026355 revision C (the *configured* revision) and then make a revision D.	Item revision- 026355 revision D (the new *configured* revision)
Example 4	Item revision- 026355 revision A (a *superseded* revision)	Item revision- 026355 revision A (a *superseded* revision)
Example 5	Item revision- 026355 revision B (a *superseded* revision)	Item revision- 026355 revision B (a *superseded* revision)

Superseded icon

Item revisions that have been superseded and are no longer the configured item revision are labeled with a visual indicator. Hover on the visual indicator and you see information about the configured revision.



How dynamic item revisions work in folders, item relations, and paste actions

The system can be configured by your administrator to only show the most recent item revisions in folders and tables, such as in the attachments for an object. If this is enabled, and you have your revision display rule set to **Latest**, you only see the most recent item revisions, even if the revision you originally pasted into a folder or related to an object has changed since you added it.

> Note:
>
> Revisions are displayed based on your revision display rule. Because of this, different revisions may display for your selection based on which rule you choose.

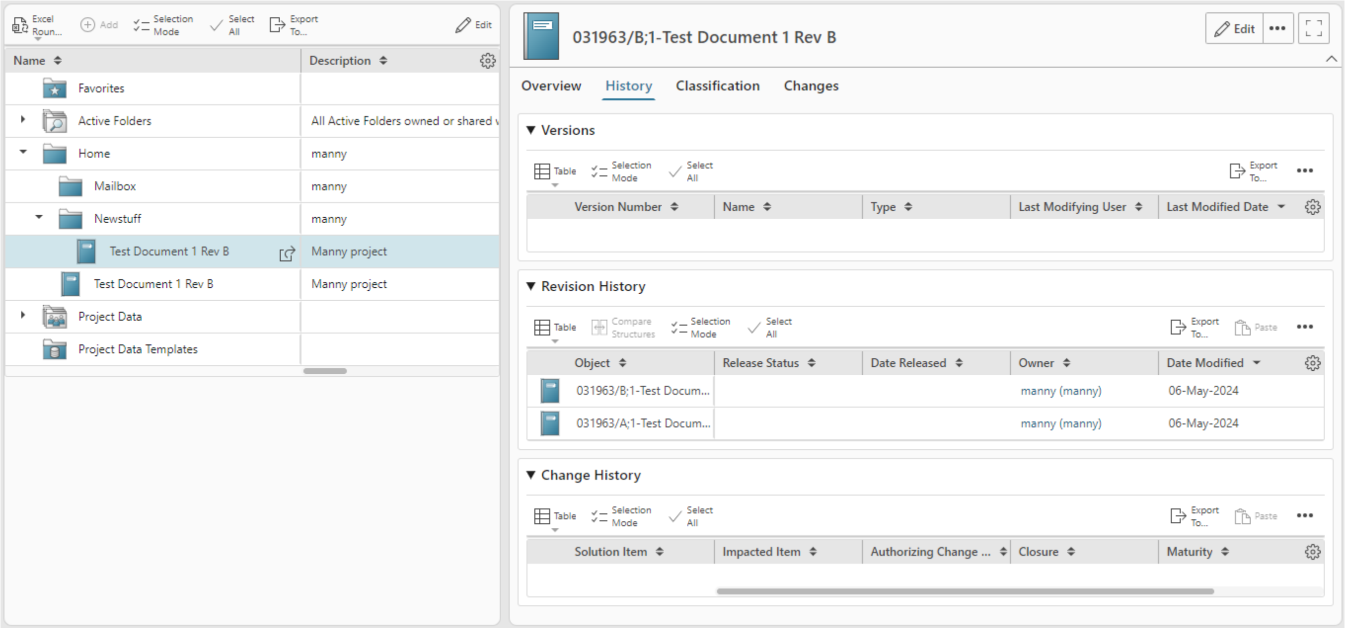
Keep the following in mind about how revisions appear when dynamic revisions are enabled:

- If you relate a non-configured or out-of-date revision, then this revision is related and the displayed revision does not change.
- If you relate a configured revision, then the item is related and the displayed revision automatically changes to your currently selected configured revision.

Folders

Items in your folders that you or other users revise are automatically updated to the most recent revision. This allows you to always see the most current revision of your items when browsing through your folders.

For example, you create a new document in your home folder that is revision A. Later, you revise this document and it is now revision B. The next time you browse your home folder, the new revision B displays. You can then select the item and view previous revisions on the **History** tab if necessary.



Note:

Automatic updating of item revisions in folders is enabled by default. Your administrator can change this to prevent items from automatically updating to the new revision. In that case, any non-configured or out-of-date revisions pasted into your folders display with a warning icon letting you know the revision is not current.

Viewing a table

When you view a table, the display of items and item revisions depends on whether or not the table Is controlled by revision rules defined by an administrator, and if revision rules are defined, which one you select in your session settings.

- If an item is present in a table controlled by revision rules, the table displays the item revision selected by the rules.
- If a specific item revision is present in a table controlled by revision rules, then that revision is always displayed regardless of any revision rules.
- If a table is not controlled by revision rules, the table displays what is present, whether that is an item or an item revision.

Note:

An administrator must configure how tables show revisions as described in Active Workspace Customization: objectSet tables and revision rules.

Relating an item revision by copy and paste

When you paste a copied item revision into a table:

- If the target table is *not* controlled by revision rules, then the copied item revision is pasted.
- If the target table *is* controlled by revision rules *and* the pasted item revision *does not* match the one that the revision rule would have chosen, then the copied item revision is pasted.
- If the target table *is* controlled by revision rules *and* the pasted item revision *does* match the one chosen by the rule, then the item itself is pasted.

Access your content quickly

Use **Quick Access** to quickly view objects you recently worked with, data saved to the clipboard, and data tagged as favorites from any page.

> Note:
>
> This command is hidden by default in some Workspaces. Administrators may also hide it elsewhere in the system configuration.

- Navigate to **Quick Access** from the **global navigation** and select **Quick Access** .

  > Tip:
  >
  > Assuming the command is not hidden in the configuration, you may need to select **More Commands** ••• to reveal the command. This can depend on your screen resolution and how many other commands are configured to appear in the navigation panel.

- Easily view the content by expanding and collapsing the three sections of data.
- Drag items from **Quick Access** to places like your home folder or to a product structure.
- Select items in the panel to work with.

Open a part, document, or other object

To view or otherwise work with a data object you need to *open* it. Once opened, you can view detailed information such as properties, access attachments, and perform various operations.

1. Select a part, document, or other object you want to open.
2. Click **Open** on the selection tile.

> Note:
>
> You can also make a selection and click **Open** > **Open in New Window** or **Open in New Tab** from the primary toolbar.

Based on your browser settings, an attached file attached may open immediately, or you may be prompted to download or save the file.

> Note:
>
> If an administrator has enabled the Data Share Manager, a dialog box may appear asking you to install the Data Share Manager on your client to manage file uploads and downloads.

Create / Add a part, document, or other object

If you have the requisite user permissions you can create new data objects.

1. Open the folder in which you want to create a new object such as a part or document.

   For example, open your **Home** folder.

2. Select **More Commands** ••• > **New** > **Add**.

   The **Add** panel opens.

3. (Optional) To keep the **Add** panel open so that you can continue to add objects without opening the panel each time, click **Pin Panel** to pin the panel to your workspace.

   You can click **Unpin Panel** to unpin the panel from your workspace.

4. Select the type of object you want to create from the **Type** list. The most recently used types are displayed at the top of the list.

   You can also search for a type using the **Search** box.

   The types that display are configured by the system administrator.

   If you are creating a new attachment, you can upload an existing file as an attachment to the new object. In the **FILE ATTACHMENTS** section of the **Add** panel, click **Choose File** and select the desired file. The system automatically sets the type to the file type that matches the file extension. If there is more than one choice, it selects the configured default, but you can change the selection.

   > Note:
   >
   > If an administrator has enabled the Data Share Manager, a dialog box may appear asking you to install the Data Share Manager on your client to manage file uploads and downloads.

5. Enter properties.

   The properties vary depending on the type being created. These properties are configured by style sheets, which are maintained by the administrator.

   Add is highlighted when all required fields are entered.

6. Click **Add**.

   The newly created object is placed at the top of the current list, list with summary, or table display for easy access. If you create a single new object, the object is automatically selected. The object is placed in the expected sort order once you navigate away from this location or apply filters.

   > Note:
   >
   > If you pinned the panel to your workspace, the **Add** panel remains open, the **Revision** and **Name** values carry forward, and the **ID** value increments.

Add a classified object to a selected folder

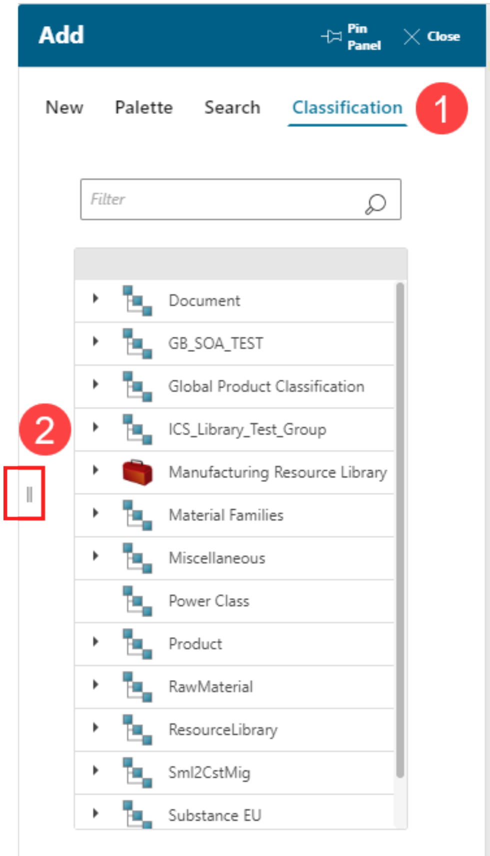
The **Classification** tab allows you to search for classified objects. If you want to classify objects, open the **Classification** location.

1. Select the folder to which you want to add a classified object.

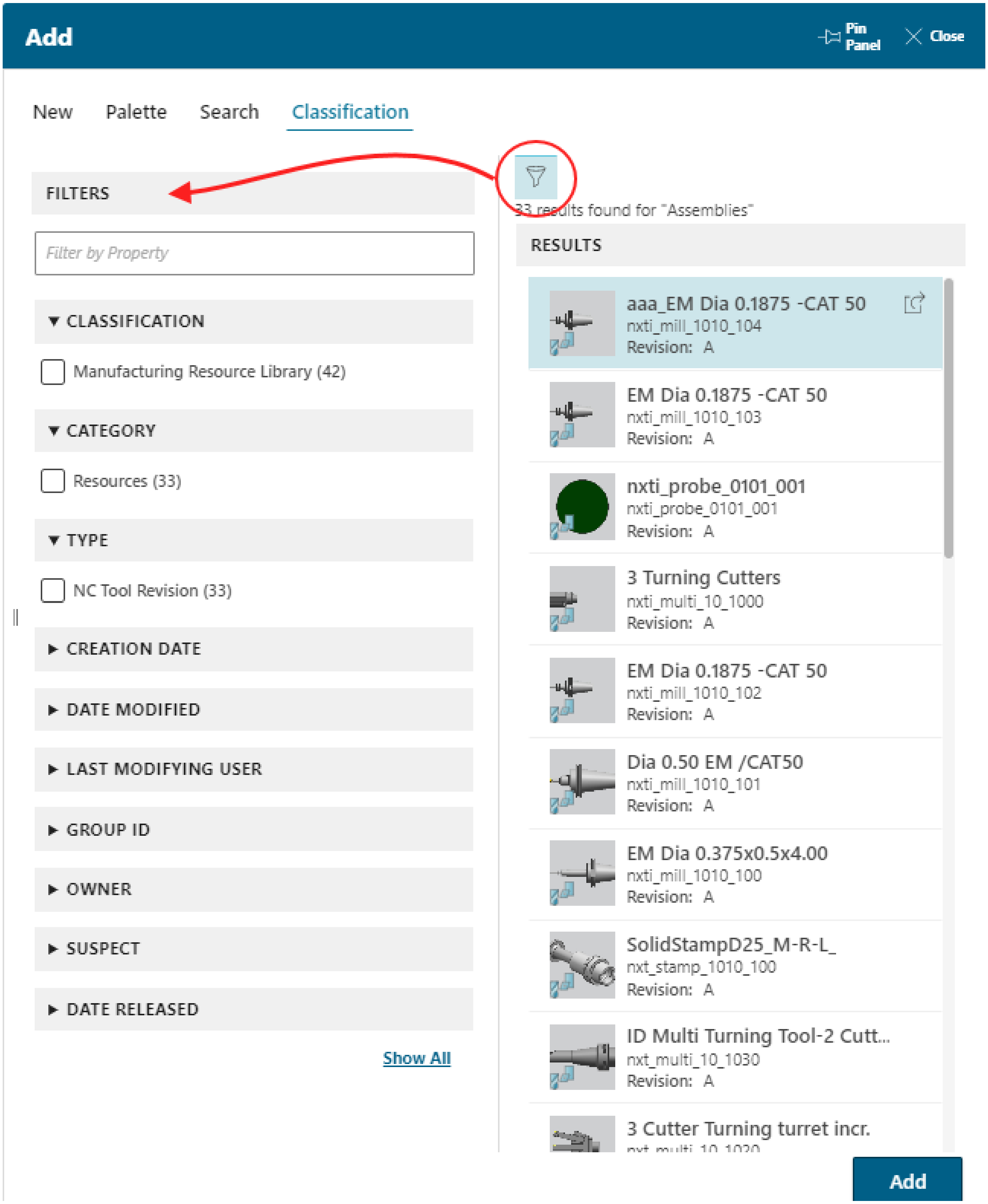
2. Click **New** > **Add** ⊕.

   If you don't see the command, click **More Commands** ••• in the global header.

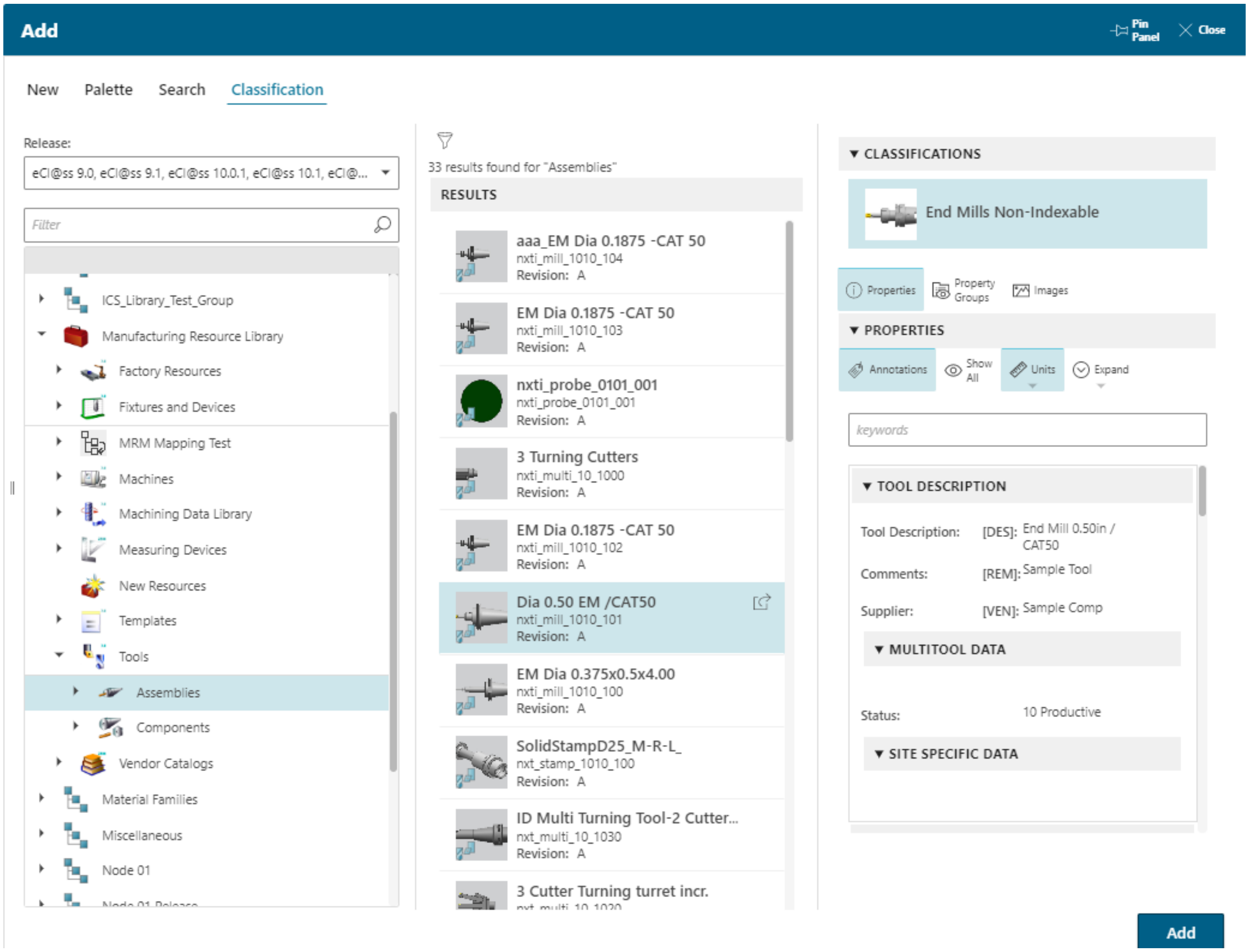
3. Click the **Classification** tab 1.



4. Select a class and drag the pane 2 to twice its width to display search results or to select the **Filter** button to further refine the results.



5. Drag the pane to three times its width to view the classification properties of the selected object.



6. Click **Add** to add the classified object to the folder.

Change ownership of a data object

Data objects are assigned an *owner*. By default, the user who creates an object is the owner, but ownership can be changed. You can only change the owner of an object if you have appropriate permissions, including the **Write** permission.

Ownership of related objects

Many objects have related objects. When you change the ownership of an object that has related objects, the ownership of some or all related objects may need to transfer to the new owner at the same time. There are two options for transferring ownership:

1. Automated rule-based ownership transfer. Your administrator defines system-based rules that govern ownership transfer of related objects when the ownership of the parent object changes. Your administrator should publish these rules, and you should understand them before changing

the ownership of an object. If there are many related objects this is the fastest option, provided that the rules deliver the desired outcome.

2. Manual control of ownership transfer. When changing the ownership of an object that has related objects, you can explicitly transfer ownership of some, all, or none of those related objects to the new owner. This action overrides the ownership transfer rules defined by the administrator. This method can be time consuming if there are many related objects.

Procedure

1. Select one or more objects.

2. Click **More Commands** ••• > **Manage** > **Change Owner**.

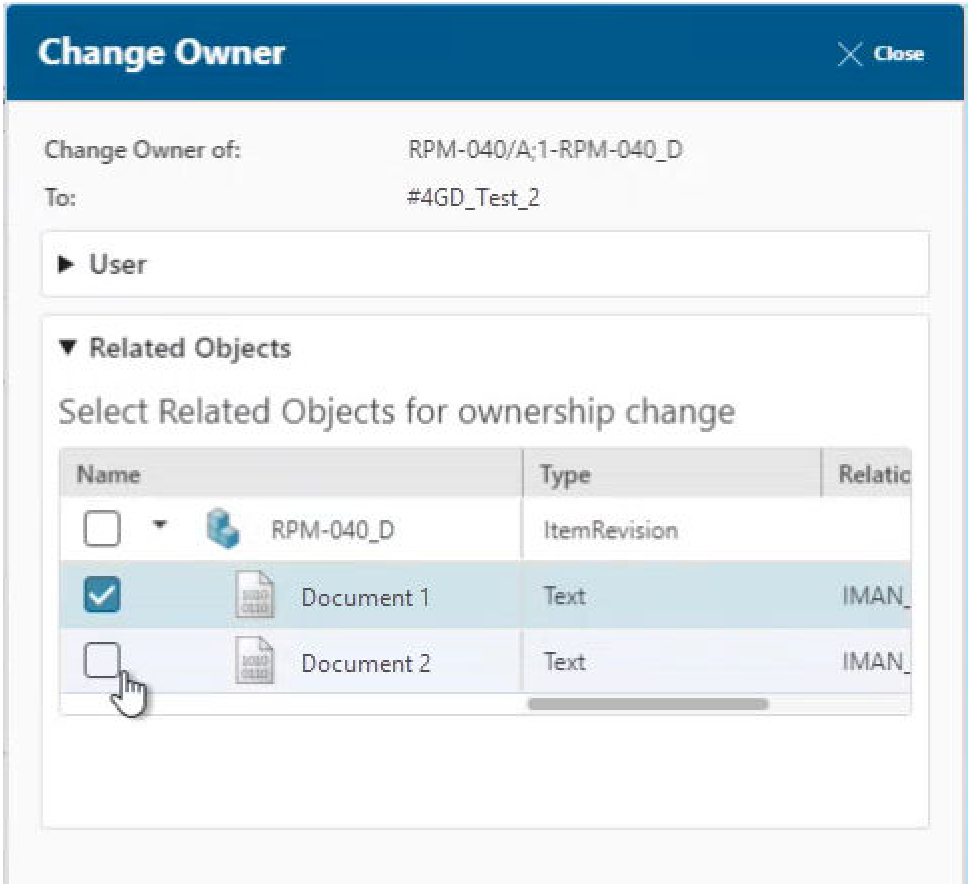
3. In **Change Owner**, select the new owner in the **User** section.

   You can use the search box to search the list for a specific user. You can **Filter** the **Users** list by type, group, or role. Ownership of all related objects will transfer to this user along with the parent object.

4. If you want to transfer ownership of all related objects according to the administrator-defined rules, click **Change** and skip the remaining steps.

5. If you want to explicitly specify ownership of related objects, expand **Related Objects**.

   Any related objects appear in a table.



6. If related objects are displayed, select the ones whose ownership you want to change and deselect the ones whose ownership you do not want to change.

7. Click **Change**.

   You can see the change of ownership in the object **Properties**.

Note:

You cannot change the owner of the following object types:

- **Answer**
- **Att0MeasurableAttributeInt**
- **Comment**
- **CostValue**
- **Fixed Cost**
- **RateModifier**
- **Rating**
- **Required Qualification**
- **ResourceAssignment**
- **Schedule**

- **Helpful**
- **Measurable Attribute**
- **Measurable Attribute Boolean**
- **Measurable Attribute Double**
- **Measurable Attribute String**
- **Proxy Task**
- **Question**
- **Schedule Audit**
- **Schedule Deliverable**
- **Schedule Member**
- **Schedule Task Deliverable**
- **ScheduleTask**
- **Task**
- **TaskDependency**

Check out and check in data objects

Before you can modify an object or its properties you must check it out. Other users cannot modify an object that is checked out to you. When you finish working with an object you have checked out, you should check it in.

You need to be granted the requisite permissions to be able to check out objects.

1. Select a part, document, or other object you want to check out. For example, select something from the list of search results.
2. Click **More Commands** ••• > **Edit** > **Check Out**.

   The selection displays a **Checked-Out** property set to **Y**.

To check a selection back in, click **More Commands** ••• > **Edit** > **Check In**.

To cancel the checkout, click **More Commands** ••• > **Edit** > **Cancel Checkout**.

Also see Check out and check in objects when using Multi-Site Collaboration.

Edit data object properties

You can modify the properties of parts, documents, and other objects provided you have the required permissions. You can edit properties in various panels and tables.

The properties you can edit vary based on how your administrator configured the style sheets.

1. Open the part, document, or other object whose properties you want to edit.

2. Select **More Commands** ••• > **Edit** > **Start Edit** .

   The **Edit** button appears only when you select something you can modify. In some panels, such as the **Information** panel, an **Edit** button is available for quick edits.

   > Tip:
   >
   > To retain changes you must click **Save** before you navigate away.

   The properties that you can edit are enabled for editing.

3. Type or modify the properties as necessary.

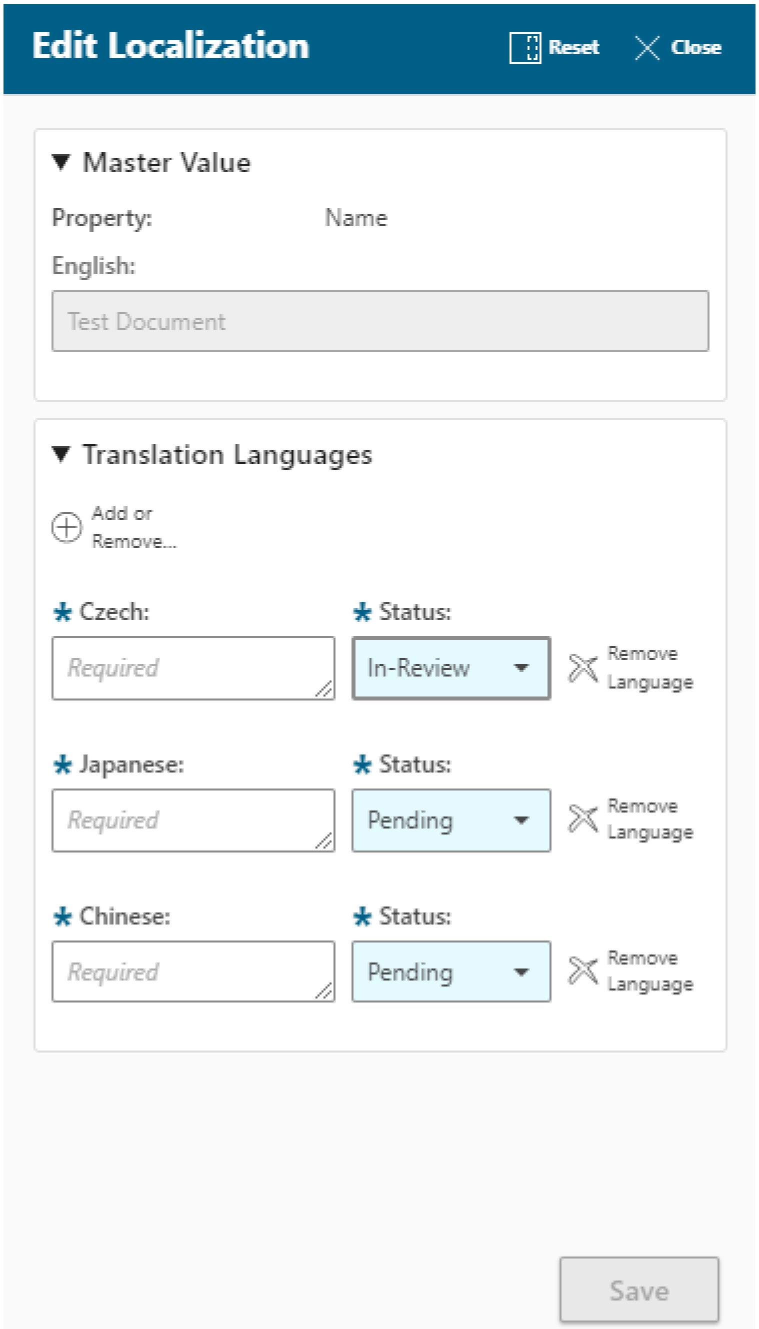
   When you modify a property value, the field background changes color to indicate that your edit has not been saved.

4. Select **More Commands** ••• > **Edit** > **Save Edits** to save your changes.

   To cancel your edits, you can select **More Commands** ••• > **Edit** > **Cancel Edits** .

Add multiple language properties for an object

When you are viewing the properties for an object some fields, such as the **Name** and **Description**, allow you to edit the localization information for those fields to add additional languages for the property. In addition, you can also set the status of the additional languages to track if they are pending, approved, or invalid.



1. When viewing the properties for an object, click **Edit Localization** next to the property you want to add different languages to.

   The **Edit Localization** panel opens. The **Master Value** section of the panel displays the property you are editing and it's default language.

2. In the **Translation Languages** section, click **Add** to display a list of available languages.

3. From the list of languages, click the checkbox next to each language you want to add to the property. For each language you select, a new row is added in the panel.

4. Enter the translation text for each language and set the **Status** as necessary. You can choose to set the status to **Approved**, **Pending**, **In-Review**, or **Invalid**.

5. Click **Save** to save your changes and close the panel.

Delete a translated property value

You can delete a translated property value when it is no longer needed.

1. When viewing the properties for an object, click **Edit Localization** next to the property with the language you want to delete.

2. In the **Translation Languages** section, click **Remove Language** next to the language you want to remove.

   Alternatively, you can also deselect a language from the list of available languages to remove its translation.

3. Click **Save** to save your changes and close the panel.

Modify a table property

Properties identify specific characteristics about an object, such as the color and trim package of a selected make and model of car. Certain object properties are best represented using an editable table format. This topic describes the available editing actions available to you.

For example, a table format is useful when collecting repetitive data such as employee contact information. Table properties can be found anywhere that a property can be located, but most often table properties are located on the **Overview** or **Table Property** tab.

Paint Colors Table:

COLOR NAME	R VALUE	G VALUE	B VALUE	MAKE BUY
Passion Rose	254	16	251	Buy
Rocket Red	255	7	42	Buy
Serene Turquoise	3	183	201	Make
Summer Marigold	225	216	5	Buy

Note:

A table property is defined and configured in the Business Modeler IDE by an administrator. Some table properties may be configured to be noneditable, in which case, the following steps do not apply.

You can complete the following actions on a table property:

Add a row

1. Open an object such as an assembly.

   The properties of the object display in a table.

2. Click **Edit**.
3. Click **Add** to add a row to the property table.
4. Add the appropriate data in the cells of the new row.
5. Click **Edit** > **Save Edits**.

Remove a row

1. Open an object such as an assembly.

   The properties of the object display in a table.

2. Click to highlight the row to delete.
3. Right-click and select **Remove**.

Duplicate a row

1. Open an object such as an assembly.

   The properties of the object display in a table.

2. Click **Edit**.
3. Click a cell in the row to duplicate.
4. Click **More Commands** > **Duplicate**.
5. Make any changes to the data in the cells of the duplicated row.

6. Click **Save Edits**.

Modify data in a row

1. Open an object such as an assembly.

   The properties of the object display in a table.

2. Click **Edit**.

3. Click each cell to modify the data in that cell.

4. Click **Edit** > **Save Edits**.

Define properties in addition to the object's configured properties

You can add properties to objects that are in addition to the configured properties. For example, in an automotive environment you can define variable properties for each vehicle, such as model, weight, and manufacture date. Or in a shipping environment, you can define a package's weight, shipping address, and size. These are properties that are defined ad hoc and associated with the object.

This functionality must be configured by an administrator.

1. Search for the object using the search box, or navigate to it in your folder structure.

2. (Optional) Filter the list to quickly find the desired object.

3. Click **Open**.

4. Click the appropriate tab.

   The tab reflects the name defined by your administrator for your organization. Most often, the tab name reflects the type of information you are defining.

5. Click **Edit**.

6. Click **Add**.

7. In the **Create** panel, define the **Type**, **Name**, and **Value** for the property you are adding. Refer to the five supported property types in the following list.

   > Note:
   >
   > The field values that display on the **Create** panel reflect the selected **Type** and **Value**, where **Name** is the name of the property you are defining.

> You cannot define the same name for multiple property types.

Type	Value
String	An alphanumeric character string.
Double	A numeric value containing a decimal point.
Boolean	A binary variable; either true or false.
Date	A date and time selected from the calendar and time pickers.
Integer	A numeric value

8. Click **Add**.

   The name and value are added to the table.

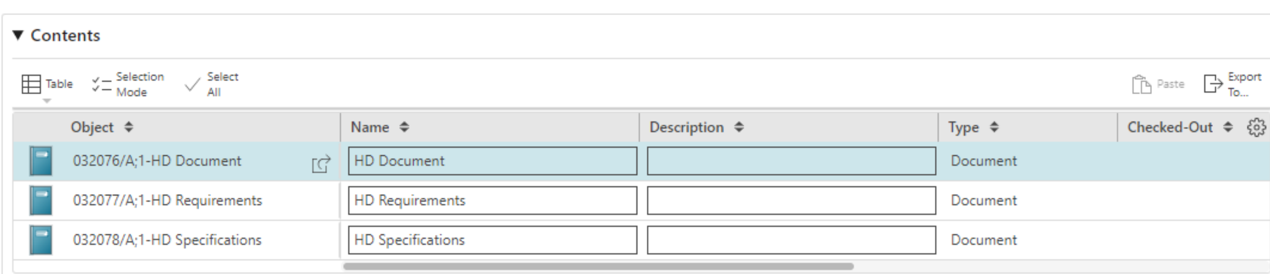
NAME	VALUE
Model	SUV
Weight	5345.453
Towing Package?	true
Manufacture Date	12-Oct-2016 02:00
Doors	5

9. Click **Save**.

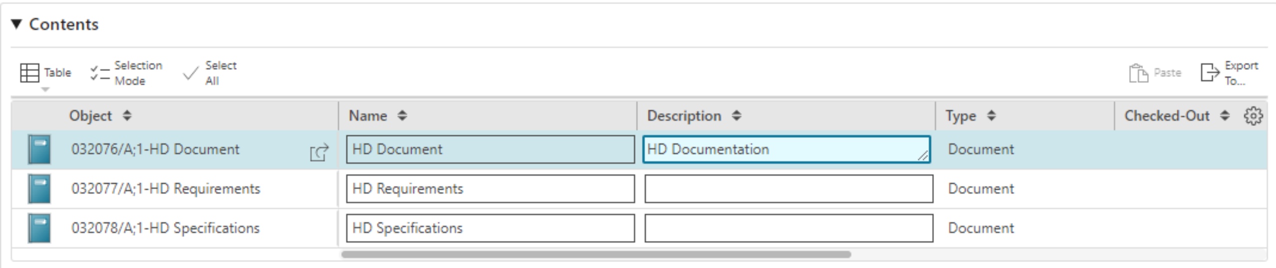
Autofill properties in a table

Copy the content of a selected table cell to a range of cells above or below the selected cell.

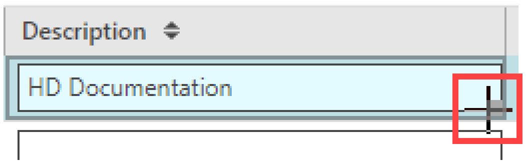
1. Display the table and click **Edit**.



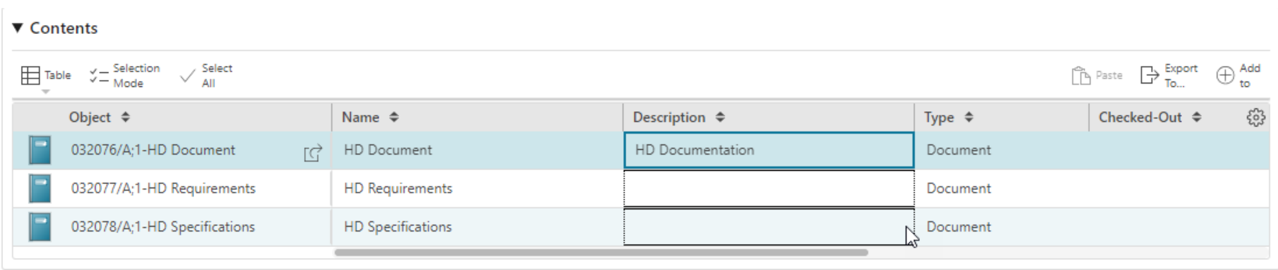
2. In the table, select a cell and, if the cell is empty, enter the content to be copied.



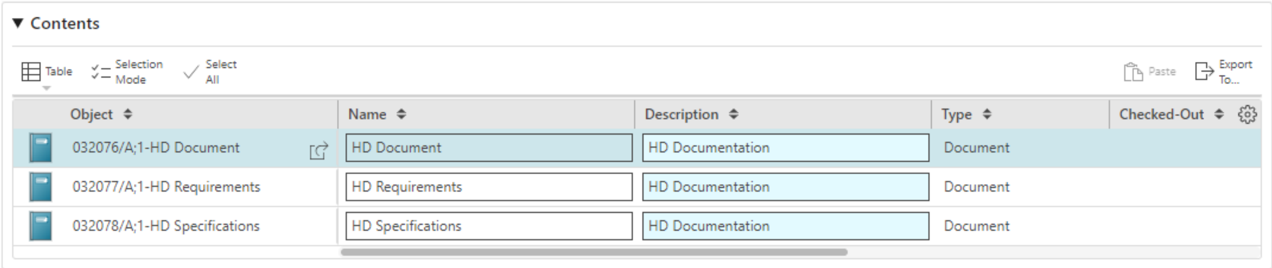
3. Move the mouse cursor over the cell to display the small fill-down box in the lower-right corner of the cell, then place the cursor over the small box to display the large plus sign (**+**).



4. With the plus sign displayed, press the left mouse button and drag up or down to select the cells to fill.



5. Release the mouse button.



6. Click **Save** to save your changes.

   The changes are saved, except for objects that you do not have **Write** privileges to modify properties.

Drag objects between browser windows

You can *copy* some objects by dragging them between windows of the *same* browser. You can *open* some objects by dragging them between windows of *different* browsers.

Copy or open parts, documents, or other objects from a location loaded in one browser window to another accepting object or location in another browser window.

> Tip:
>
> When dragging an object, click, hold, and move the object in a single fluid motion. If you do not move quickly enough, the system assumes you want to select multiple objects.
>
> If dropping onto a location or object is not allowed, the cursor displays a cancel ⊘ symbol.

Drag to copy

You can drag an object between two windows of the *same* browser (Google Chrome, for example), when both windows are running Active Workspace, to *copy* the object from one window to an accepting object in the other. An accepting object is one that supports a relationship with the object being dragged. You cannot copy by dragging objects between windows of *different* browsers - between Google Chrome and Mozilla Firefox, for example.

Drag to open

You can use drag between windows of *different* browsers (between Firefox and Chrome, for example) to *open* a selected part, document, or other object.

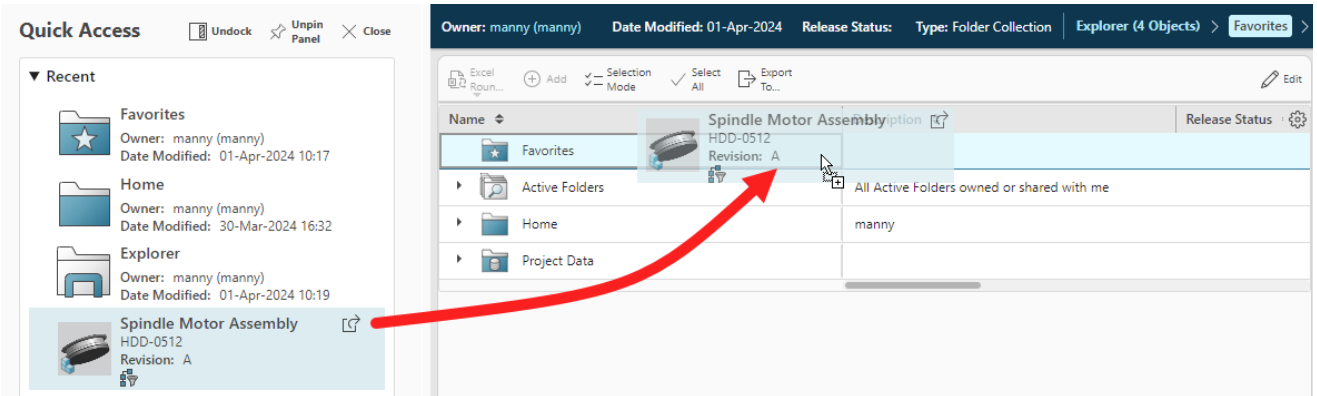
For example, you can select an object, such as a part or document in a list, and drag that object to the URL address box in another browser. This opens Active Workspace in the second browser's window and opens the object there.

Drag objects in lists and tables

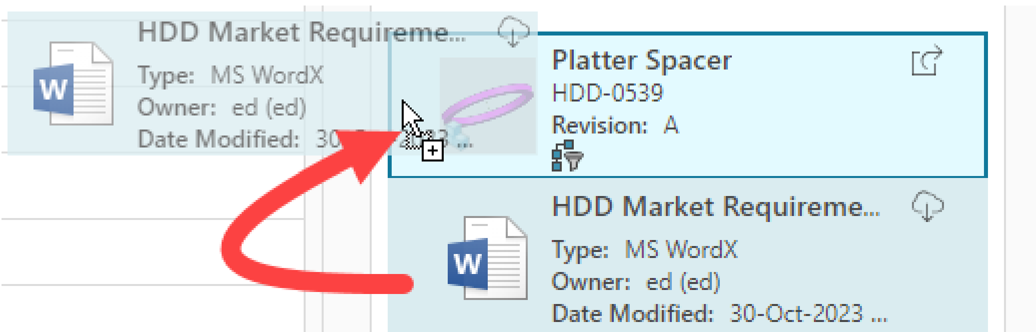
You can drag one or more parts, documents, and other objects from, to, or within tables and lists rather than performing copy and paste operations.

- Drag into an accepting list or table to create a new entry in the list, or a new row appended to the end of the table.

  When you drag, you see an outline around the target table or list indicating where you are allowed to drop.



- Drag onto an accepting object (table row or list item.) In this case, the accepting object highlights indicating where you are allowed to drop.



Tip:

When dragging an object, click, hold, and move the object in a single fluid motion. If you do not move quickly enough, the system assumes you want to select multiple objects.

An accepting object is one that supports a relationship with the object being dragged and dropped. If dropping onto a location or object is not allowed, the cursor displays a cancel ⊘ symbol.

You can drag one or more objects onto a table to create a new table row.

1. Drag the object to the target table's header row.

   A bounding box appears to indicate you can create a new row with the dragged object.

2. Release the object to create the new table row.

You can drag parts, documents, or other objects onto an accepting table row and have that row create appropriate relationships to those objects.

For example, you can release a dragged document onto a part in a table, and the document becomes a child of the part.

Create alias IDs and alternate IDs

Alias IDs and alternate IDs allow you to better manage your part data, such as supplier part numbers, customer naming standards, and legacy part names. Alias IDs and alternate IDs are associated with the Teamcenter object. You can then search and filter for these IDs to quickly find the objects, or set your **ID Display Rule** to display them as you work with a part.

> Note:
>
> When creating an alias ID or alternate ID, you must choose an ID context. This is configured by your administrator.

Create an Alias ID

An alias defines the ID of an object you do not have direct control over, such as supplier part numbers. It can also be used when the same ID can be applied to more than one object, such as a service part number. You create an alias when the part is similar to the current part and it can be used as a substitute in the product structure.

1. Search for and open the item revision you want to create the alias ID for.
2. Click **More Commands** ••• > **New** > **Create Alias ID** ⊕.

   The **Create Alias ID** panel opens.
3. Choose the **Context** and **Type** for the alias ID and enter the ID properties.
4. Click **Create**.

   The related object now shows the newly created alias ID in the **ALIAS IDS** section of the **Overview** tab.

Create an Alternate ID

An alternate ID defines additional IDs for an object. However, the alternate ID relates to only one unique identifiable object. Alternate IDs are often used to create different part numbers as an object evolves or to create a part number for a part used across multiple organizations. You create an alternate ID when the part is identical to the current part and you want to create your own naming scheme instead of using the existing one.

1. Search for and open the item revision you want to create the alternate ID for.
2. Click **More Commands** ••• > **New** > **Create Alternate ID** ⊕
3. Choose the **Context** and **Type** for the alternate ID and enter the ID properties.

4. Click **Create**.

   The related object now shows the newly created alternate ID in the **ALTERNATE IDS** section of the **Overview**.

Creating new data or revisions from existing data

Creating new data from existing data

Data items in Teamcenter are called **objects**. An object describes a part, assembly, design, document or other entity stored in your system. You can create new objects from existing objects and new revisions of existing objects.

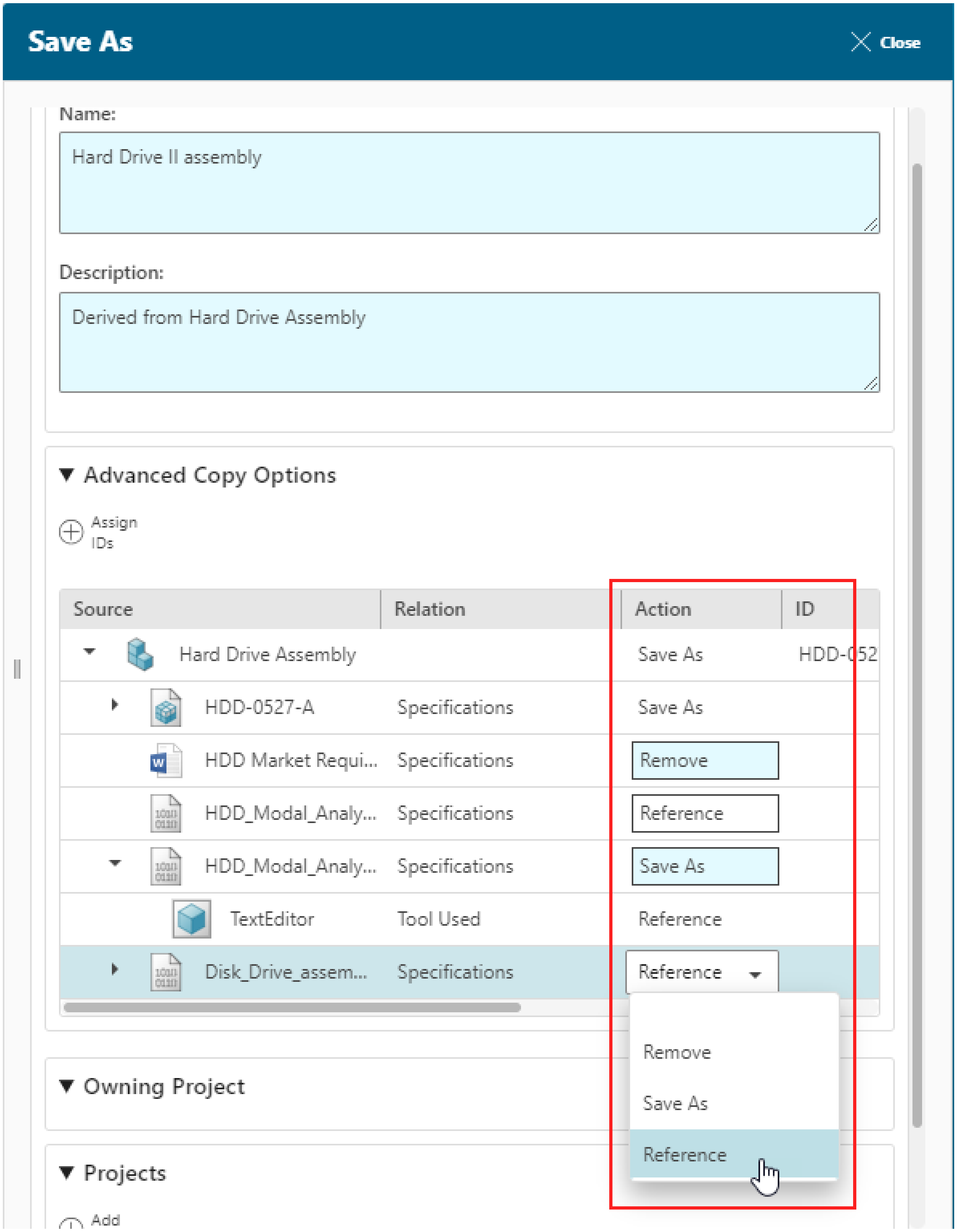
By default, a new object or revision includes all objects related to the original existing object. However, you can review and specify the disposition of all related objects during the process of creating a new object or revision. For example, if you want to create a new assembly from an existing assembly, or a new revision of an existing assembly, you can specify what happens with all its parts, including subassemblies and their parts.

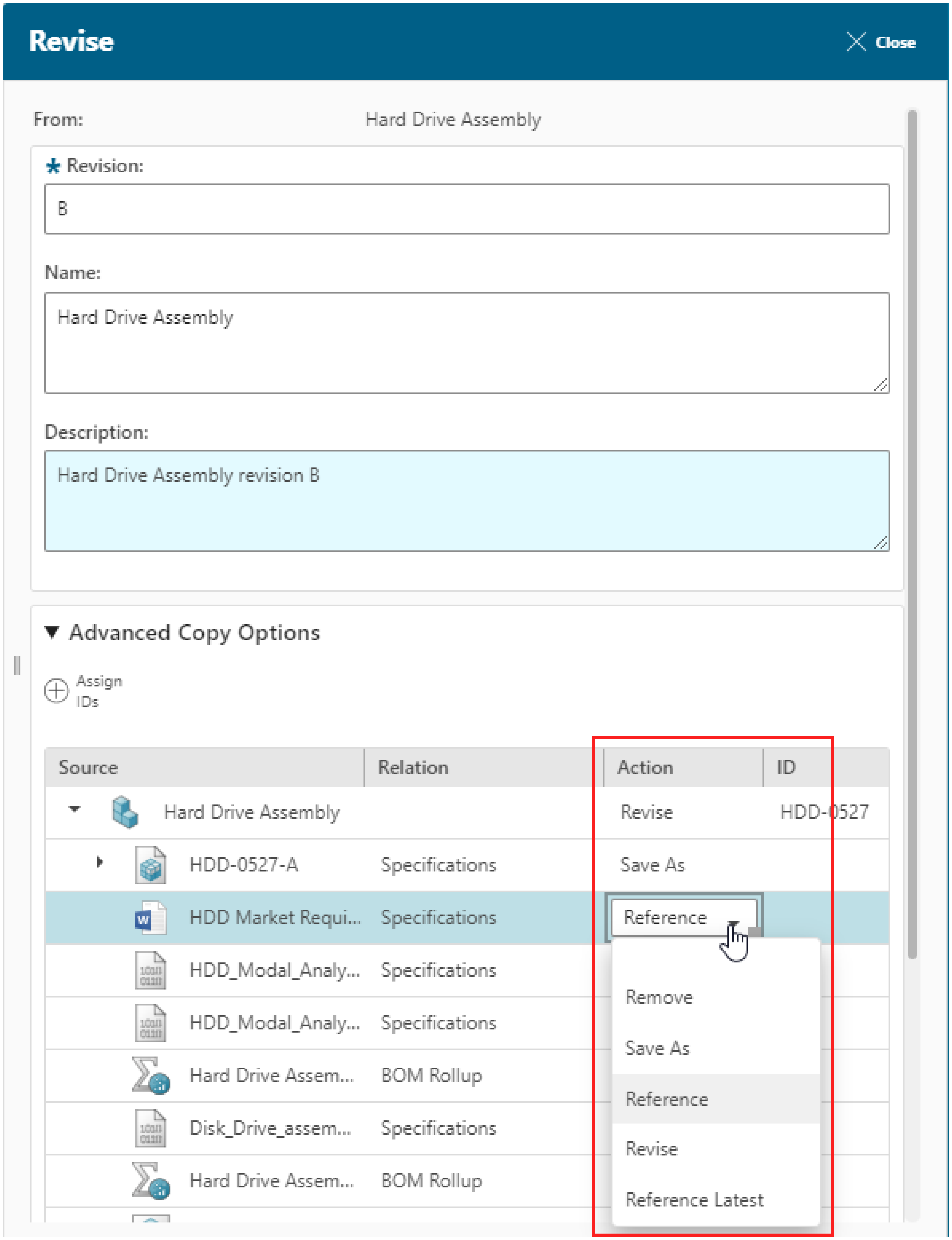
You can:

- Specify a name and description for the new object.
- Include or exclude related objects such as parts or documents.
- Reference objects related to the original object rather than copy them as new objects. (In a new revision, a reference can optionally point to the latest revision of the related object.)
- Save related objects as new related objects, each with a new ID, name and description.

When viewing an opened object, **Advanced Copy Options** in the **Save As** dialog box and the**Revise** dialog box contain a table where you specify your choices for the new object or revision, respectively.

The **Action** column specifies the disposition of all objects that are related to the object being saved as a new object.


Save As
Close
Name:
Hard Drive II assembly
Description:
Derived from Hard Drive Assembly
Advanced Copy Options
Assign IDs
Source
Relation
Action
ID
Hard Drive Assembly
Save As
HDD-052
HDD-0527-A
Specifications
Save As
HDD Market Requi...
Specifications
Remove
HDD_Modal_Analy...
Specifications
Reference
HDD_Modal_Analy...
Specifications
Save As
TextEditor
Tool Used
Reference
Disk_Drive_assem...
Specifications
Reference
Remove
Save As
Reference
Owning Project
Projects
Add



Related topics

- Create a new object from an existing object

- Create a new revision of an existing object
- Introduction to objects and object types

Create a new object from an existing object

Data items in Teamcenter are called **objects**. An object describes a part, design, assembly, document or other entity stored in your system. You can create new objects from existing objects. By default, the new object contains references to all objects related to the original existing object. You can review and specify the disposition of the related objects during the procedure.

Related topics:

- Creating new data from existing data
- Create a new revision of an existing object
- Introduction to objects and object types

Procedure

1. Open the object from which you want to create a new object. If the object has multiple revisions, select the revision on which to base the new object.

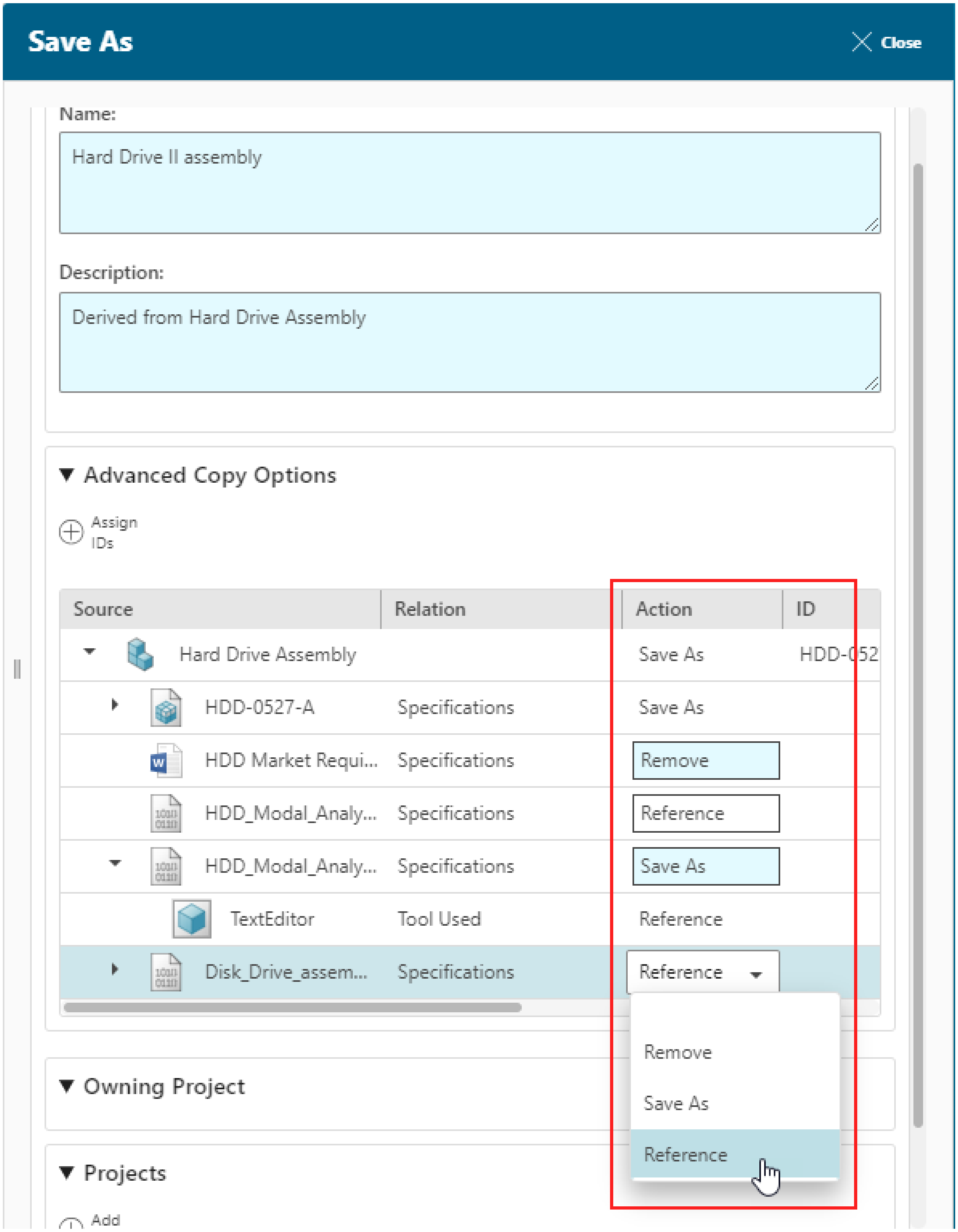
2. Click **More Commands** ••• > **New** > **Save As**.

   The **Save As panel** opens.

3. Enter a name for the new object in the **Name** box.

4. Enter a description of the new object in the **Description** box.

5. If you want to change the default disposition of some or all related objects in the new object, click **Advanced Copy Options**, review the table of related objects and make changes in the **Action** column.



The available actions for related objects are:

- **Remove**: The selected related object will not be included in the related objects of the new object.

- **Reference**: Create a reference to the current revision of the related object in the related objects of the new object. This is the default for all related objects.
- **Save As**: Create another new object related to the new object with the same relationship.

6. In the **Projects** section, click **Add Project** ⊕, select a project as owner of the new object, and click **Assign**.

> Tip:
>
> You can use **Search** to filter the list of projects.

7. Click **Save** to create and save the new object.

Create a new revision of an existing object

Data items in Teamcenter are called **objects**. An object describes a part, design, document or other entity stored in your system. You can create new revisions of existing objects using Active Workspace. By default, the new revision contains references to all objects related to the original existing object. You can review and specify the disposition of the related objects during the procedure.

Related topics:

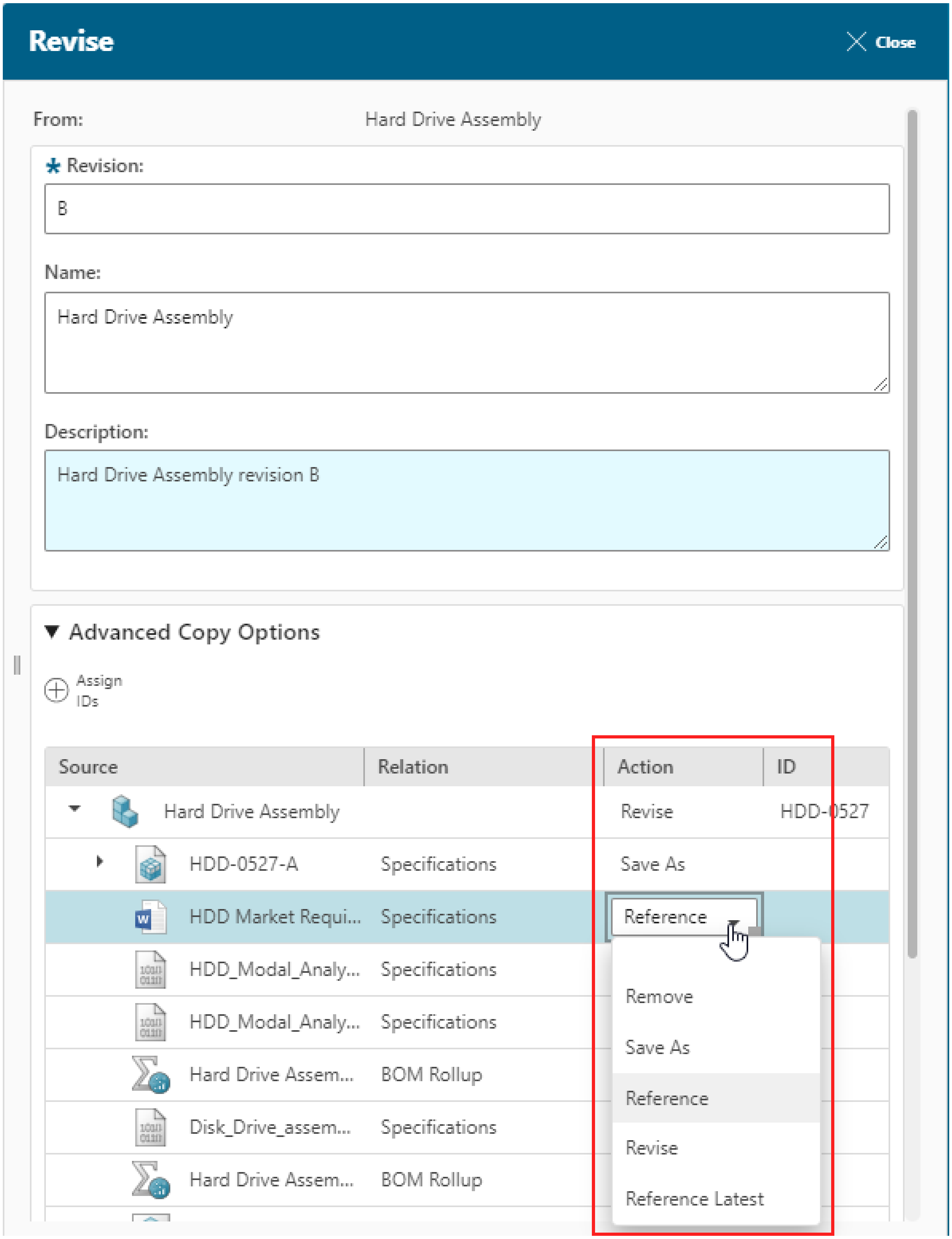
- **Creating new data from existing data**
- **Create a new object from an existing object**
- **Introduction to objects and object types**

Procedure

1. Open the object for which you want to create a new revision.
2. On the Primary toolbar, select **More Commands** ••• > **New** > **Revise**.

   The **Revise** panel opens.
3. Optionally modify the **Revision**, **Name** and **Description**.

   These inputs are automatically populated when the panel opens.
4. If you want to change the default disposition of some or all related objects in the new object, click **Advanced Copy Options**, review the table of related objects and make changes in the **Action** column.



The available actions for related objects are:

- **Reference**: Create a reference to the current revision of the related object in the new revision (the default for all related objects). If the referenced object is subsequently revised, the new revision (of the existing object) will not see revisions of the related object.

- **Save As**: Create a new related object in the new revision.

- **Remove**: The related object will not be included in the new revision of the existing object.

- **Revise**: Create a new revision of the related object in the new revision of the existing.

- **Reference latest**: Create a reference to the latest revision of the related object in the new revision. If the referenced object is subsequently revised, the revision you are creating will always see the latest revision of the related object.

5. In the **PROJECTS** section, click **Add Project** ⊕, select a project as owner of the new object, and click **Assign**.

   > Tip:
   >
   > You can use **SEARCH** to filter the list of projects.

6. Click **Revise** to create and save the new revision.

Working with attachments

Add attachments to a data object

You can attach files and documents to data objects. You can add existing items via search or by selecting from recently viewed or favorite objects. You can optionally attach a new object that you create during the attachment procedure.

1. Locate and open the object to which you want to attach another file or document. For example:

   - Perform a search and select something in the search results list.

   - Select an inbox task.

   - Open a folder where you want to add an object.

2. Locate the **Add to** ⊕ icon in the work area of the **Overview** tab.

   For example, in the default configuration there is an **Attachments** tab for item revisions. This tab has **Files** and **Documents** sections to which attachments can be added.

3. Click **Add to** ⊕ to display the **Add** panel.

4. In the **Add** panel, choose the objects you want to add by doing one of the following.

   - Click **Search**.

     The search only returns results that you can relate to the displayed item. You can also filter search results in the task panel.

   - Click **Palette** to select from the **Favorites**, **Recent**, or **Clipboard** sections.

     The **Clipboard** section displays objects previously copied to the paste buffer using **Copy**. These are preselected at this point. Otherwise, select the desired objects.

   - Click **New** to create a new object:

     a. Select the type of object you want to create either from the list of recently used object types or from the full list of available object types. You can also refine the results using **Filters**.

        If you are creating a new file attachment, you can upload an existing file as an attachment to the new object. Click the **Select File** button and select the desired file. The system automatically sets the object type to the file type that matches the file extension. If there is more than one choice, the system selects the default. You can change the selection.

     b. Enter the properties for the new object.

        The properties vary depending on the type of object being created. These properties are configured by style sheets, which are maintained by the system administrator.

        > Note:
        >
        > Required properties are designated with a red asterisk next to the text box.

5. (Optional) When multiple relation types are available for the object being added, select the desired relation from the list displayed at the bottom of the **Add** panel.

   The available options vary based on the object set selected.

6. Click **Add**.

Replace an attached file or document

You can replace an attached file when it is out of date and no longer relevant to the item is it attached to. You can replace the attachment with an updated version of the file or with a different file altogether.

1. Search for and open the object with the attachment you want to replace.

2. Click the **Attachments** tab.

3. Select the attachment that you want to replace.

4. Click **More Commands** ••• > **Edit** > **Replace File**.

   The **Replace** panel is displayed.

5. Click **Select File** to select the file to replace.

6. Click **Replace**.

Replace an attached document

In addition to replacing attached files for an object, you can also replace attached documents.

1. Search for and open the object with the document you want to replace.

2. In the **Documents** section, select and open the document you want to replace.

   The **Overview** tab for the document is displayed.

3. In the **Files** section, select the file you want to replace.

4. Click **More Commands** ••• > **Edit** > **Replace File**.

   The **Replace** panel is displayed.

5. Click **Select File** to select the file to replace.

6. Click **Replace**.

Replace files using Data Share Manager

If you have Teamcenter Data Share Manager installed perform the following steps to replace files.

1. To display the attachments for an object, open the object.

2. Click the **Attachments** tab.

3. Select the dataset to replace.

4. Click **More Commands** ••• > **Edit** > **Replace File** to display the **Replace** panel. If you are replacing a single file, the **Data Share Manager** application window is displayed.

If you are replacing a file in a dataset that has multiple files, select the file in the **Replace** panel and click **Replace**. The **Data Share Manager** application window is displayed.

5. In the Data Share Manager application window, locate or enter the replacement file. Then, click **Upload**. The selected file is uploaded and replaces the previously attached file. The Data Share Manager displays the upload status.

> Note:
>
> See **Upload or download large data files** for more information on using Teamcenter Data Share Manager without leaving the client environment.

Find more information about the Data Share Manager in *System Administration→File Management System* in the Teamcenter help collection.

Download and open attached files

You can download attached files and potentially open them in the same operation, depending on browser settings. You can optionally download multiple files in a single download operation.

1. Display an object that has attachments.

2. Select the attachment.

3. Do any of the following:

   - Select the attachment and click **Download File**.

     Based on your browser settings, the file may open immediately or you may be prompted to download or save the file.

     > Note:
     >
     > To open attachments in the Safari browser, be sure to turn off the pop-up blocker. This is especially true on iPads running Safari.

   - Right-click the attachment and then select **Copy File Download Link** to copy the download link to the Teamcenter and OS clipboard. You can then share the link with others, or paste it into your browser's address bar to download the file.

     > Note:
     >
     > If your administrator has enabled reference lists, such as in a table for an item revision and its subtypes, on the **Information** panel of an attachment, or in the **Properties** of an

object and its subtypes, all referenced files are hyperlinks. You can click the link to quickly download the referenced file.

Download multiple files at once

1. Display an object's attachments.

2. Do any of the following to select multiple files:

   - Ctrl-click each file you want to select.

   - Click **Selection Mode** and then click the check box next to each file you want to select.

   - Click **Select All** to select all files.

3. Click **More Commands** ••• > **Share** > **Download** .

   A message appears showing you how many of the selected files were downloaded.

> Note:
>
> The saved location of the downloaded files and the ability to download more than one file at a time varies depending on your browser and its settings.

View and download previous file versions

You can view and download previous file versions of files displayed in the **Attachments** tab for an object, or when viewing the properties of the attachment. This allows you to download old file versions, or restore an older version so it becomes the latest version of the file.

1. Search for an object and then navigate to the **Attachments** tab.

2. In the **FILES** section, select the attached file with the previous version you want to view.

3. Click **More Commands** ••• > **View** > **Show Dataset Versions** .

   You can also use the above command when viewing the properties for an attached file.

   The **Dataset Versions** panel opens.

4. In the **VERSIONS** section, select the file version to view its properties and a preview of the file.

5. Do any of the following as necessary:

   - Click **Download Version** to download the selected version to your computer.

- Click **Restore Version** to make the selected version the latest version of the file. A new version is automatically created and displayed in the **VERSIONS** section.

6. Close the **Dataset Versions** panel when you are finished.

Open related drawings

You can view drawings attached to an item revision in the **Attachments** of an open data object.

1. Open an object that has drawings attached to an item revision.

2. Select the desired item revision and then select **Open**.

3. Select the **Attachments** tab.

All of the drawings related to the item revision appear under **Files**.

View and mark up your attachments using the universal viewer

Use the universal viewer to view object attachments. The universal viewer appears in an object's **Overview** tab if there are attachments for the object, or in a workflow task's **Overview** tab if there is an associated attachment. The universal viewer can appear in other areas, depending on how your administrator has configured Active Workspace for your site.

The universal viewer supports the following file types.

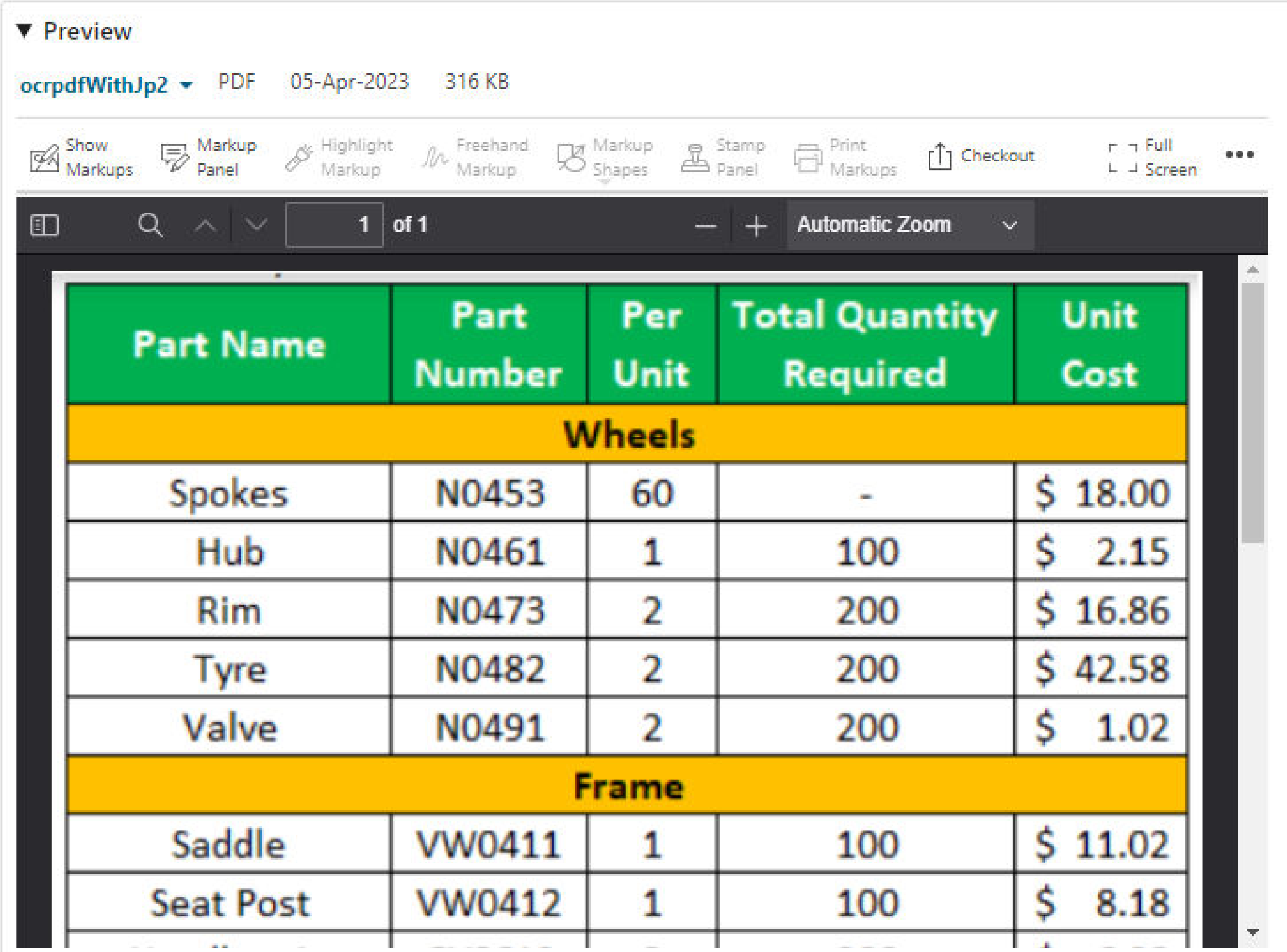
- PDF- Markup is available.
- Text
- HTML- Markup is available.
- Microsoft Office files- Editing is available depending on how Office Online configuration is set up.
- Image (JPEG, PNG, GIF, BMP, SnapShotViewData, and UGMASTER)
- Direct Model

> Note:
>
> The file types and the functionality supported will depend on how your administrator configures the universal viewer for your site.

Example of an image with the universal viewer

1	The document header identifies the document's name, file type, and last date and time the document was modified. Click the document name to open the file.
2	The work area toolbar contains the commands specific to the type of file or document displayed.
3	If a selected object has multiple attachments, click 〈 or 〉 to scroll backward and forward through all the attachments.
4	Review the document or file image that is displayed the viewer.

Example of a PDF document with the universal viewer



Part Name	Part Number	Per Unit	Total Quantity Required	Unit Cost
Wheels				
Spokes	N0453	60	-	$ 18.00
Hub	N0461	1	100	$ 2.15
Rim	N0473	2	200	$ 16.86
Tyre	N0482	2	200	$ 42.58
Valve	N0491	2	200	$ 1.02
Frame				
Saddle	VW0411	1	100	$ 11.02
Seat Post	VW0412	1	100	$ 8.18

Your options using the universal viewer vary, based on the type of file you are viewing. Typical commands on this toolbar include the following.

Markup	You can mark up a PDF or image file from within the universal viewer.
Create Highlight Markup	Mark up a text by highlighting it.
Create Freehand Markup	Mark up a document by drawing freehand.
Checkout	Check out an Office document so it can be edited.
Cancel Checkout	Cancel the check out on an Office document and throw away any changes.

Checkin	Check in the Office document to save any changes. There is no separate save command necessary.
Full Screen	View the Office document in full-screen mode. This allows the universal viewer to take over the full browser window for the display.

Upload or download large data files

The Teamcenter Data Share Manager (DSM) application provides a way for you to upload and download large data files without interrupting your work.

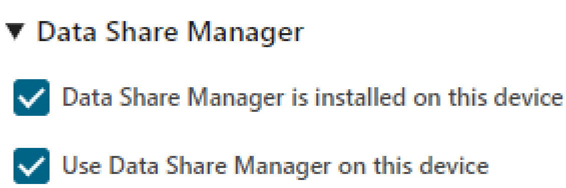
The following apply:

- You can close the client application window and the browser while the DSM is loading file data without interrupting the loading process.
- The DSM application automatically resumes loading data after interruptions, such as network or power outages.

> Note:
>
> You (or your administrator) must install the DSM application on your machine, and you must have a valid license key. Find DSM installation and detailed user instructions in *System Administration→File Management System* in the Teamcenter help.

Before using the Data Share Manager

1. Ensure that the Data Share Manager and a license key are installed on your local machine. Contact your administrator for assistance.
2. Ensure that your Data Share Manager user session values are selected in Active Workspace.
    a. Click your profile icon.
    b. In the panel that opens, select **Manage Profile**.
    c. Under **Data Share Manager**, make sure that the **Data Share Manager is installed on this device** and **Use Data Share Manager on this device** check boxes are selected.



> Note:
>
> These values remain selected until you clear your browser cache or change browser applications. If you clear your cache or switch to a different browser, you must select these values again before using the DSM.

Upload a large data file

1. Navigate to the object to which you want to upload the data file.

2. Click the **Attachments** tab.

3. Define the data file type that you want to upload (for example, PDF, Word, or Excel).

   a. Click **Add to** ⊕.

   b. In the **Add** panel, select the file type of the data file that you want to upload.

   c. In the **Name** box, define the name of the file you want to upload.

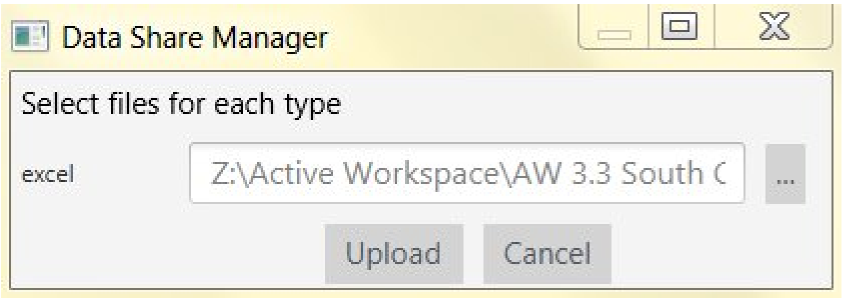
   d. Click **Add**.

4. In the message that appears on the window, click **Open**.

5. Select the desired file to upload.

   a. From the task bar on your computer, open the Data Share Manager application window.

   b. In the Data Share Manager application window, enter the path or file location, or click **...** to navigate to the file to upload, and then click **Upload**.

   The collapsed Data Share Manager window appears at the bottom of your window, showing the number of files that you have uploaded or downloaded.

6. Click **Open** in the Data Share Manager window.

7. Use the Data Share Manager application to manage your uploaded files. Find information about the Data Share Manager in *System Administration→File Management System* in the Teamcenter help.

Download a large data file

1. Navigate to the object with the attached data file that you want to download.

2. Click the **Attachments** tab.

3. Click **Download File** on the file that you want to download.

4. Click **Open** on the message that appears on the window.

   The collapsed Data Share Manager window appears at the bottom of your window, showing the number of files that you have uploaded or downloaded.

5. Click **Open** on the Data Share Manager window.

6. Use the Data Share Manager application to manage your downloaded files. Find more information on the Data Share Manager in *System Administration→File Management System* in the Teamcenter help.

Working with named references

Named references overview

Named references are objects that relate to a specific data file. In other words, a named reference is a file attached to a Teamcenter dataset.

- Datasets are Teamcenter data objects that manage data files (operating system files) created by other software applications.

- Each dataset can manage multiple operating system files as separate "named references".

- Active Workspace has some support for Teamcenter datasets, named references, and dataset tools.

- Teamcenter administrators can define named references and optionally restrict some file types from being uploaded to a dataset.

For more information see **Upload, download, and export named references**.

Upload, download, and export named references

Named references are objects that relate to a specific data file, normally an attachment. The named references for an opened attachment object appear in the **Named References** tab of the **Information** panel. You can run upload, download and export operations on named references.

Prerequisites

To download or export named references, an object must have one or more attachments, and a selected attachment must have one or more named references.

Procedure

1. Locate an object such as a part and open it.
2. On the work area toolbar, select **Attachments**.

   The **Files** section displays existing attachments as tiles.
3. In the **Files** section, select an attachment tile.
4. On the primary toolbar, select **Information** ⓘ to open the **Information** panel.
5. In the **Information** panel, select the **Named References** tab.

Results

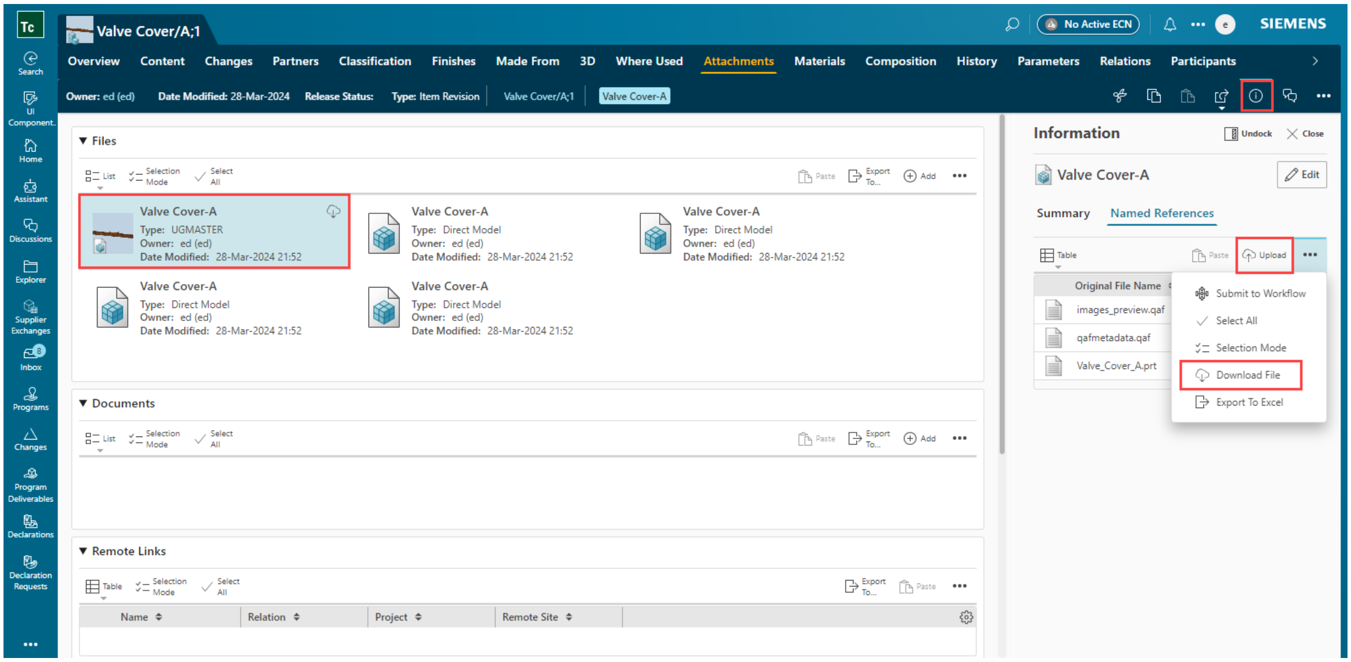
Named references appear in a table. You can now select a named reference and run any of these commands:

- **Download** selected files.
- **Upload** a file to the selected dataset.

You can run the commands from the **Named References** toolbar. Its appearance can vary according to your screen resolution.

The commands may appear as icons only or icons plus a text label. Some icons may be hidden if there is insufficient space, in which case an ellipsis (**...**) appears on the toolbar. Select it to reveal hidden commands.

> Tip:
>
> Resizing the **Information** panel wider can reveal hidden commands on the toolbar.



Exploring relations between objects

Using Relations

You can use *Relations* to view objects and the relations between objects in a graphical format.

- See or hide incoming and outgoing relations.
- Choose what objects or relations appear in the work area. You can do this by using the **Legend** panel or by applying filters based on object properties.
- Use an overview map to navigate large structures.
- Change the layout of the network display.

Tips for using Relations

- Double-click the background to resize the network to fit all content in the display.
- Use the left mouse button to drag the network around the display area. To move an individual object, click the object first and then drag it using the left mouse button.
- Use the roller on your mouse to zoom in and out of the network. The more you zoom in, more detailed information is displayed.
- Point the mouse over an object in the network to display additional details, such as the object name.

- Point the mouse over an edge (that is, a line connecting two objects) to display the type of relationship between the objects.
- Select an object, edge, or port and then click **Info** ⓘ to get more information about it.

  You cannot see the ⓘ button if the edge has no properties.
- To print a network, click **Open in...** to open in print view.

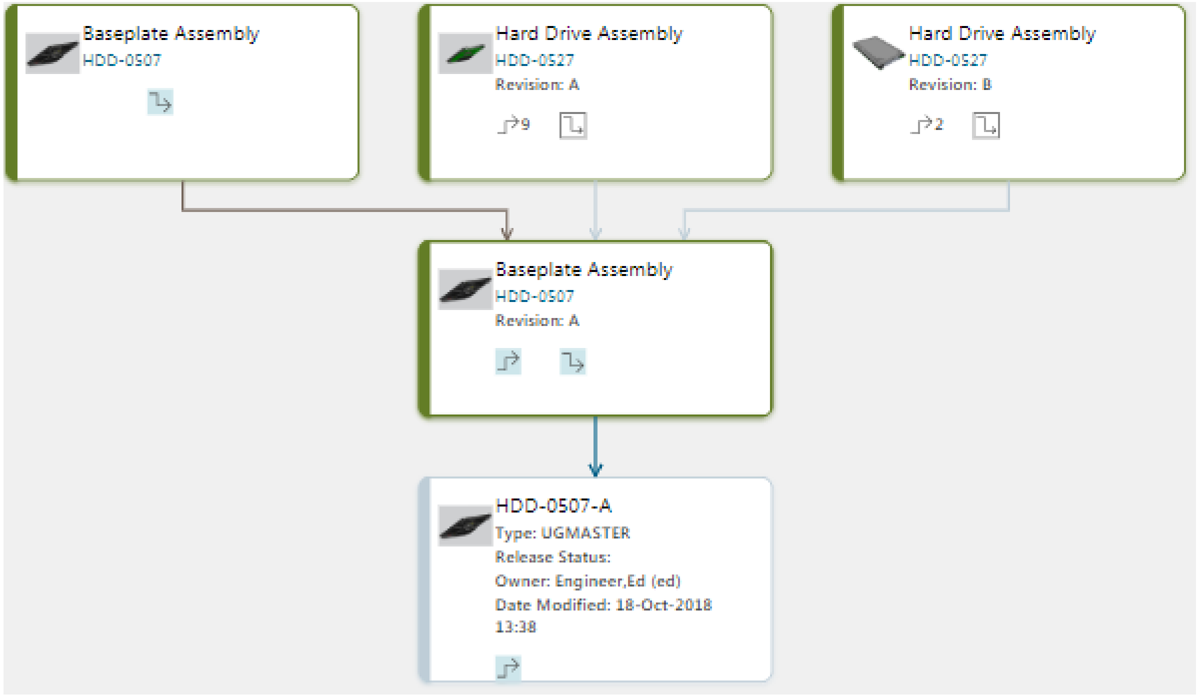
View data related to an object

This topic explains the procedure for viewing data related to an object.

1. Search for an object using the search feature.
2. From the list of search results, select the object for which you want to view the related data.

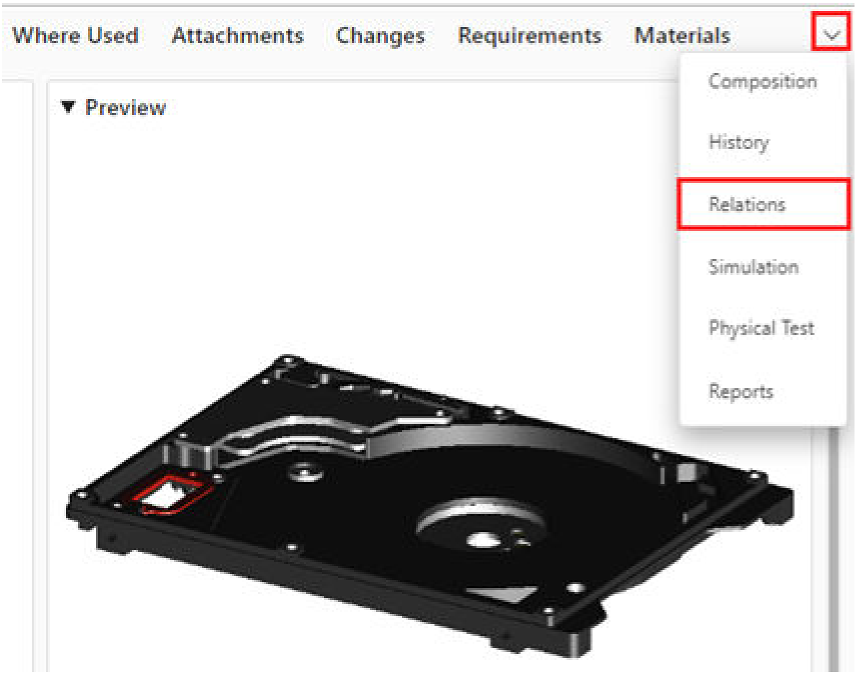
   This is the *root* object.
3. Select **Relations**.

   By default, the object and its immediate relations appear.



Tip:

Depending on your display resolution and the size of your browser window, **Relations** may be hidden. Click the chevron to expose it.



You can do the following actions:

Action	Ways to perform the action
Expand and collapse objects	Click arrows inside the objects to expand or collapse incoming relations
	Click arrows inside the objects to expand or collapse outgoing relations
	Use the one-step command bar
Show and hide objects	Using Legend
	Clicking the icon of the object
Make hidden objects visible	Using the Relations panel
Filter objects	Using the Filter panel
Highlight objects	Using Legend
	In the diagram, highlight objects that have relations going in the same direction.

Action	Ways to perform the action
Navigate the diagram	**Using the overview map**
Change the layout of the diagram	**Using the layout command**

4. Click the arrows inside the objects to show or hide relations:

   Shows all the incoming relations.

   Shows all the outgoing relations.

   Hides the incoming relations for the object.

   Hides the outgoing relations for the object.

   Hides all the incoming relations or shows all the incoming relations, as applicable.

   Hides all the outgoing relations or shows all the outgoing relations, as applicable.

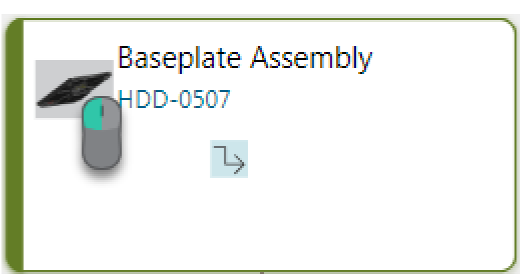
5. You can also show incoming and outgoing relations from the one-step command toolbar as follows:

   Select an object and click one the following buttons in the one-step command toolbar.

   Shows incoming relations. In the list that appears, select the number of levels to be displayed.

   Shows outgoing relations. In the list that appears, select the number of levels to be displayed.

6. Click the icon of an object to hide the object.



The object fades away until it is hidden. You can cancel the hide action by clicking its icon again before it is hidden.

7. To show the object that you hid by clicking on its icon or to hide objects in the graph, select an object and click **Relations**.

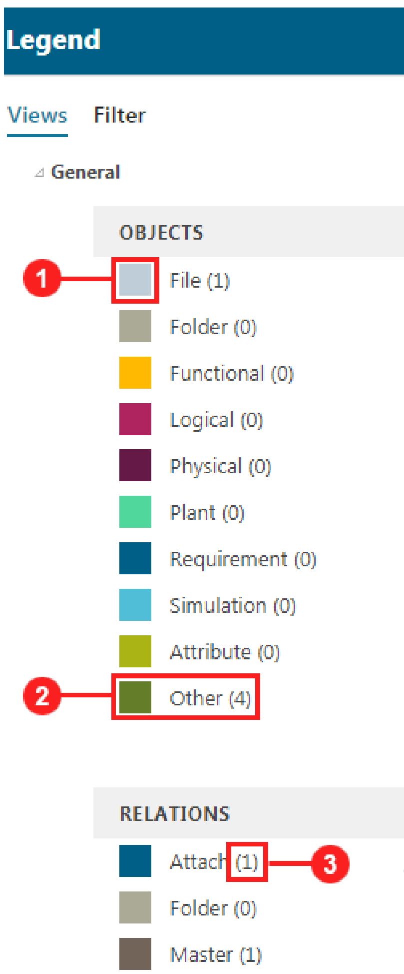
   In the **Relations** panel:

   - Objects whose icons are grayed out are hidden in the graph. Click the objects to make them visible.
   - Objects whose icons are not grayed out are visible in the graph. To hide objects, click them.

8. Using the **Legend** panel, you can highlight and hide objects and relations.

   Click **Legend** to display the **Legend** panel and then click **Views**.

   The colors of the object types and relations listed in the **Legend** panel correspond to those of the object border and edges, respectively, in the work area.



1. Click the colored square next to the object or relation name to hide or show objects or relations in the work area.

   Note:

   The root object cannot be hidden. Orphan objects, that is, objects whose predecessors are hidden, are also hidden.

2. Select the object or relation name to select the object or relation in the work area.

   Use Ctrl + click in the menu to select multiple objects or relations.

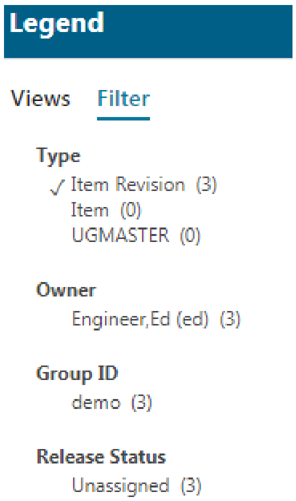
   If you select or undo the selection of an object in the work area, the corresponding object type is selected in or cleared from the **Legend** pane.

   When you expand a selected object in the work area, all other selections for objects are cleared.

3. The number within the parentheses denotes the number of expanded objects or relations that are visible.

The icon at the bottom right corner indicates that objects and relations are hidden in the graph.

9. You can choose the objects that you wish to see in the work area by filtering them based on their properties such as *object type* or *owner*.



a. Click **Legend** to display the **Legend** pane and then click **Filter**.

b. Click the property of the object that you want to use as a filter, for example, under the **Type** property, click **Item Revision**.

c. To remove a filter, click the selected property.

> Note:
>
> The root object cannot be filtered out. Orphan objects, that is, objects whose predecessors are hidden, are also filtered out.

The icon at the bottom right of the page indicates that a filter is applied.

10. You can investigate the relations between objects at two ends in the diagram as follows:

    a. Select an object in the graph.

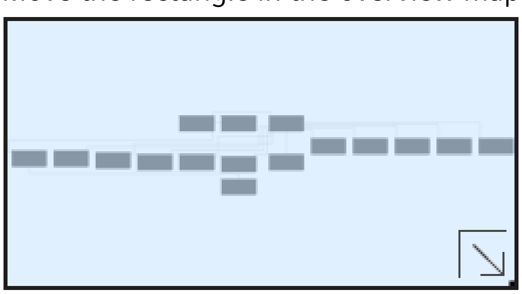
    b. Press the Shift key and select another object in the graph.

    Objects with similar relations going in the same direction are highlighted.

11. Use the overview map to navigate easily in cases where there is a large network of objects and relations.

    Click the lower right corner of the work area to view the overview map of the network .

    Move the rectangle in the overview map to browse the network.

.

12. Click in the one-step command toolbar to change the layout of the network display.

    You can display the content using various layout types, such as top to bottom and left to right.

Managing object relationships and traceability with trace links

Trace links overview

Traceability provides a connection between data objects. For Model-Based Systems Engineering, this means connecting our structure elements together.

Trace links establish the traceability among structure elements and in which one object takes precedence over another. A trace link establishes a directional relationship between two objects.

For example, creating links between requirements, between system model blocks, and between each other. When the requirements and system modeling are complete, users have complete traceability from requirements, to functions, to logical and physical objects allowing users to see the decision, requirements and alternatives that lead to a particular design alternative.

The trace link **Start** (defining object such as a requirement), is the trace link source. The **End** (the complying object such as a system model block), is the target. In this relationship, the **Start** defines a condition with which the other **End** must comply, that is, must partially or completely fulfill.

Create a trace link

You can create trace links between objects such as requirements and system model blocks. You can create a one-to-many or a many-to-one trace link relationship, but not a many-to-many relationship.

1. Ensure that you have the objects that you want to link in the results pane.

2. Click **More Commands** > **New** > **Create Trace Link**.

   If you want to create multiple trace links, click **Pin** in the **Create Trace Link** panel. Pinning keeps the **Trace Link** panel open after you create a trace link. You can then create another trace link by changing the **Start** or **End** objects.

3. Drag the selected objects to either the **Start** or **End** panels.

   To remove an object from the trace link, select it in either the **Start** or **End** panel, and then click **Remove**.

4. Select the **Type**, and then click **Create**.

Create a trace link using Copy and Paste

One way to create trace links is by using Copy and Paste.

1. Ensure that you have the objects that you want to link in the results pane.

2. Select one or more objects, and then click to copy the selected objects to the clipboard.

   You can copy objects from one browser window and paste into another window.

3. Click **More Commands** > **New** > **Create Trace Link**.

4. Click **Paste** in either the **Start** or the **End** panel.

5. Select the **Type**, and then click **Create**.

Sharing data

Sharing Teamcenter data with other sites

Product design and development often includes groups of people scattered across multiple locations. Even with different responsibilities, these groups of people might rely on the same product data to perform their roles.

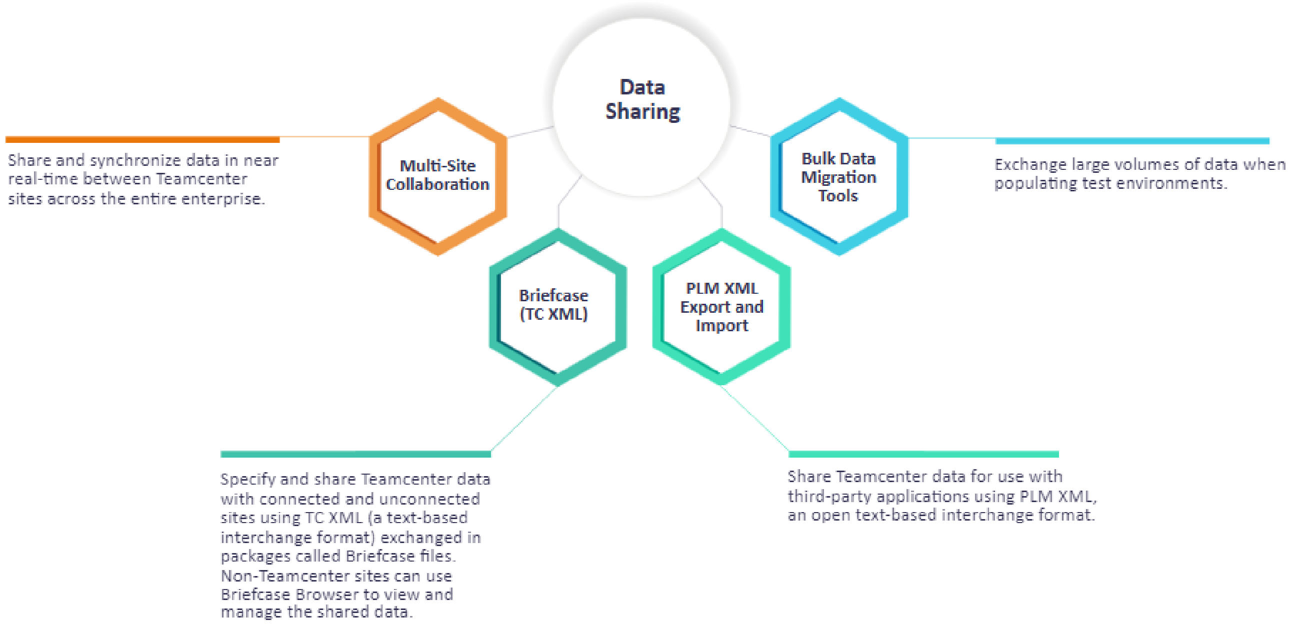
- Several groups within your company might rely on having access to a project's latest updates as they work on different aspects of the project. These groups may be on site or in other parts of the world.

- Outside organizations, such as suppliers supporting OEMs, may have similar data requirements. The suppliers may need a mix of read and write access to the data as they may be responsible for the development of certain parts of the project.

- Some groups may be downstream customers with applications that leverage your data as part of their business processes.

- You may be combining or archiving existing sites as the company structure changes or projects are retired.

Active Workspace provides several ways to share data to meet these needs:



Typical uses of each data sharing solution

Data Sharing Solution	Typical Use
Multi-Site Collaboration	A company has engineering sites in Tokyo and Detroit. They also have manufacturing sites in Detroit. All of the sites are connected on a network. The engineering sites regularly share data as they design and develop products. At the end of each workday at the engineering sites (which are 11 hours apart), they use Multi-Site to make sure each site has the most recent product data updates. When the product development completes, the engineering sites use Multi-Site to push the final engineering data to the manufacturing sites.
Briefcase and TC XML	An OEM produces a complex product with a component that has its design outsourced to a supplier. The supplier does not have access to the network the OEM uses. The OEM packages the component data the supplier is responsible for and shares the Briefcase file using secure FTP. The supplier imports the data and updates it with changes and new parts. The supplier then repackages the parts data in a Briefcase file and sends it to the OEM for review and integration with the overall product.
PLM XML	An OEM works with a supplier that uses a PLM solution other than Teamcenter. To exchange product data, the companies need a common data format. The OEM converts the relevant product data to PLM XML which has a published SDK and uses a product-neutral data model. The supplier converts the PLM XML into the

Data Sharing Solution	Typical Use
	data model their PLM tools use, imports the data, and modifies it as necessary. The supplier converts the modified data back to PLM XML and returns it to the OEM.
Bulk data migration tools	A company has several organizations relying on Teamcenter for their daily work activities. System availability is critical. The company plans to update Teamcenter and Active Workspace to the most recent versions, but they want to ensure the updates cause minimal down time. The company creates a Teamcenter test environment using the updated versions of Teamcenter and Active Workspace. They use the bulk extract tools to get a copy of the product data from their production environment. They then use the bulk copy tools to populate their test environment with the production data copy. There, they perform a battery of tests to ensure the new versions of Teamcenter and Active Workspace work as expected with their product data.

Where do I go from here?

Administrator	
Configure your organization for sharing objects packaged in Briefcase files	See the section on how to configure Briefcase file sharing.
Monitor any issues your organization may be having when sharing Teamcenter data using Multi-Site	See Multi-Site Dashboard to view the issues in your Multi-Site federation using charts, graphs, and detailed object reports.
Monitor your organization's history of Teamcenter data sharing using Multi-Site and Briefcase file	See Monitor data exchange transactions to view and analyze your organization's history of Multi-Site and Briefcase transactions using charts, graphs, and detailed object reports.
Configure your organization for sharing Teamcenter data using PLM XML	See the section on how to configure PLM XML.
Populate a Teamcenter environment with data	Refer to the section on bulk loading product data.
Business User	
Import or export Teamcenter data packaged as Briefcase files	Get information on **using Briefcase files**.
Import or export Teamcenter data using the open PLM XML interchange format	See the section on how to **share data using PLM XML**.
Share Teamcenter data with others in your organization using Multi-Site Collaboration	Refer to **the section describing Multi-Site Collaboration**.

Sharing data using Briefcase files

Using Briefcase files

You can collaborate with other sites by sharing objects using Briefcase files. Select the objects to share with the other sites, export the objects to a Briefcase file, and provide that file to the other site. If you use **Briefcase checkout** to allow objects to be updated at another site, the objects can be updated at that site, returned to your site, and checked back in.

For example:

- Share data with Teamcenter supplier sites that are online (connected) or offline (unconnected). Other sites can optionally update the objects and return them to you.
- Share data with Teamcenter sites in your own organization that are not connected (offline).
- Exchange data with organizations that are not using Teamcenter (unmanaged sites).
- Exchange data with Teamcenter sites using different data models than yours.

You can export objects of the types specified by your administrator. You cannot export objects using Briefcase files in the design context when using Supplier Collaboration.

You can also view and analyze your organization's history of Briefcase transactions using charts, graphs, and detailed object reports. See Monitor data exchange transactions.

Export objects using Briefcase files

You can share objects with other sites by exporting them to Briefcase files and providing the files to the other sites. If you use **Briefcase checkout** to allow objects to be updated at another site, the objects can be updated at that site, returned to your site, and checked back in.

You can export objects of only those types specified by your administrator.

Export data to a Briefcase file

1. If the target site is intended to modify the exported data, grant modification rights to the target site using either **Briefcase checkout** to grant temporary modification rights (excluding revise rights) or by **transferring ownership of the objects**.

2. Select one or more items or assemblies to be exported to the target site. These selections become separate root items in the exported Briefcase.

3. Select **More commands** ••• > **Import/Export** > **Export to Briefcase** to display the **Export to Briefcase** panel.

4. Specify the export properties on the **Export to Briefcase** panel.

Property	Description
Target	Select **Teamcenter** if you are sharing data with a site managing its data with Teamcenter. Select **Briefcase Browser** if you are sharing data with an unmanaged site. Unmanaged sites can open the Briefcase file with Briefcase Browser.
Target Site	Enter the name of the site to which you are exporting data.
Transfer Option Set	Select the transfer option set to use when exporting the objects. Low-level configured and unconfigured transfer option sets are available when exporting to a Teamcenter target site. High-level configured transfer option sets are available for exporting to a Briefcase Browser target site. The available configured transfer option sets are controlled by your administrator. Depending on the selected transfer option set, you can specify additional options such as **Revision Rule** and **Variant Rule** on the panel and override other options. Update those values as necessary for your export.
Briefcase Name	Accept the default file name or update it as necessary.
Delta Export	Set **Delta Export** to **Yes** to export modified objects tracked by configured incremental change as a partial structure export.
Force Re-Export	Set **Force Re-Export** to **Yes** to repeat the same root object's most recent configured export using the specified values of **Transfer Option Set**, **Revision Rule**, and **Variant Rule**.
Validate	Set **Validate** to **Yes** to specify that the exported data be validated and a summary report generated during export. If you set **Validate** to **Yes**, optionally click **Validate Only** to simulate an export of the data with the current settings. You receive an alert when the report of the simulated export is generated. No Briefcase file is generated. Review the report as described in *Review the export report* later in this topic.

5. Click **Export** to create the Briefcase file. You receive an alert when the export is complete.

   If **Validate** is set to **Yes** and errors that impact data integrity occur during the export, a Briefcase file is not created. Review the validation report as described in *Review the export report* for details.

Review the export report

You receive a report alert when your export or validation run completes. Click on the alert to view the report of the export or validation. All recent alerts are available from the **Subscription** tile.

The **Properties** section of the report includes details such as a list of the objects exported, the target site, transfer option set used, and so on. Under **Related Objects**, click on the export log entry or validation report entry to view additional details.

Transfer the exported Briefcase file

The **Target Object** section of the export report contains a link to the exported Briefcase file. You can **preview the Briefcase file and compare it to other Briefcase files** from the report.

Download the file and transfer it to the target site by email or other means.

Import objects from Briefcase files

You can import objects packaged in Briefcase files that have been exported from their owning sites to your Teamcenter (managed) site and provided to you. (Unmanaged sites without Teamcenter can use Briefcase Browser to open and work with Briefcase files.)

Use Briefcase files in the following scenarios:

- You may be a supplier receiving objects from an OEM that you update locally and provide back to the OEM. In this scenario, the objects you are to change have been checked out to your site for modification. Update them and then create a Briefcase file containing the updated files and send it to the OEM.

- Ownership of certain objects is now being handled by your site. The objects have been marked for ownership transfer and are included in a Briefcase file you import to your site.

- Objects you have previously exported to another site have been updated by that site, and they are being returned to you in a Briefcase file.

Before importing objects from Briefcase files, you can **preview the file contents and compare the file contents to those in other Briefcase files** (such as previously exported Briefcase files).

You cannot import objects using Briefcase files in the design context when using Supplier Collaboration.

Import objects from Briefcase files

1. Select the **Awb0Element** root business object or the folder into which you wish to import the objects from the Briefcase file.

   If you are importing objects modified that were previously exported to another site, select the object or folder from which the objects were originally exported.

2. Click **More commands** ••• > **Import/Export** > **Import from Briefcase** to display the **Import from Briefcase** panel.

3. Use **Choose File** to locate the Briefcase file on your local system.

4. Select the transfer option set to use when importing the file. Override any options as necessary.

5. Set **Validate** to **Yes** to specify that the imported data be validated prior to importing objects.

   If **Validate** is set to **Yes** and errors occur during the validation, a report is generated, but no objects are imported

   A **Validate Only** button becomes available on the panel. Optionally click **Validate Only** to simulate an import of the data with the current settings. You receive an alert when the report of the simulated import is generated. No Briefcase file contents are imported. Review the report as described in *Review the import report* later in this topic.

6. Click **Import** to import the objects from the Briefcase file.

   If **Validate** is set to **Yes** and errors that impact data integrity occur during the import run, the objects from the Briefcase file are not imported.

   You receive an alert when the import run is complete. Review the report as described in *Review the import report*.

7. Review the selected folder for the imported objects.

   If you are a site that has been granted permission to edit objects owned by the owning site, those objects are checked out in the folder.

   If your site owns the objects that were updated at another site, **check in the objects**.

Review the import report

You receive a report alert when your import or validation run completes. Click on the alert to view the report of the import or validation. (All recent alerts are available from the **Subscription** tile.)

Under **Target Object**, download the import log which includes details such as a list of the objects imported, the transfer option set used, and so on.

Under **Related Objects** in the **Properties** section of the report, click on the validation report entry to review the optional validation report.

Check out objects for modification at another site

You can use Briefcase files to check out an object for updating at another site (such as a supplier site). This process is referred to as a Briefcase checkout. Briefcase checkout grants temporary modification rights (excluding revise rights) to the target site. These objects are included in an exported Briefcase file provided to the other site.

Briefcase checkouts help OEMs and suppliers collaborate for the following purposes:

- Adding or modifying datasets at a supplier site.

- Adding or modifying components (**ps occurrences**) at a supplier site.
- Modifying metadata (attribute values) of workspace objects at a supplier site. Modification of non-workspace objects, items, and item revisions is not supported.

Keep these objects checked out as long as you want the remote site to have modification rights. If the Briefcase checkouts are canceled at the owning site, any changes made at the remote site cannot be checked in.

- You can perform Briefcase checkouts only on objects of the types specified by your administrator.
- You must have permission to check out and modify an object to perform a Briefcase checkout.
- You cannot check out an object for a site if it is already checked out locally or to another site.
- You cannot check out objects in Briefcase files in the design context when using Supplier Collaboration.

Check out objects using Briefcase Check Out

1. Select one or more objects you want to check out.
2. Select **More commands** ••• > **Edit** > **Briefcase Check Out** to open the **Briefcase Check Out** panel.
3. Chose a target site.

   Check **Teamcenter** if the target site is a managed site using **Teamcenter**. Check **Briefcase Browser** to check out the objects to an unmanaged site.
4. Set **Target Site** to the name of the target site.

   The selected objects can only be updated at the site specified, even when included in a Briefcase file that is supplied to other sites.
5. Click **Check Out** to check out the objects to the target site.

   Objects checked out to a target site are identified with a icon. Hover over it to see the check out status.

Check in objects using Briefcase Check In

After you **import a Briefcase file** containing objects that were checked out using Briefcase checkout, you can check in the objects to your site.

- You can check in objects in Briefcase files that have been checked out for your site.

- You can check in objects in Briefcase files when you are the user who checked out the objects in the original Briefcase file. An administrator also can check in these objects when another user checked out the objects.

- You cannot check in objects in Briefcase files when in the design context when using Supplier Collaboration.

Select the objects that you want to check in to your site and select **Edit** > **Briefcase Check In**. The objects are checked in.

Cancel a Briefcase checkout

If you used Briefcase checkout to check out an object to a site and need to cancel the checkout, select the object and select **Edit** > **Cancel Briefcase Check Out**.

You can cancel your own Briefcase checkouts, but only an administrator can cancel a Briefcase checkout when another user performed the checkout. When a Briefcase checkout is canceled, any changes made at the other site cannot be checked in.

Transfer ownership of objects to other sites

Before using Briefcase to export objects, you can specify (mark) which objects are to be exported with their ownership transferred to the target site.

Marking objects for ownership transfer before the export improves data exports by letting you:

- Precisely identify which objects will have their ownership transferred

- Verify that the ownership of the objects can be transferred

- Lock those items against ownership transfer from a different session or by a different user in this same session

When you mark an object for ownership transfer, ownership of its entire island of objects is transferred upon export. That is, the principal object and the additional objects on which it depends for its correct functional definition and usage within Teamcenter, including item revisions, are owned by the target site upon export. If you mark an item revision for ownership transfer, the full item is marked for ownership transfer. By transferring ownership of the entire island of objects, the target site can edit the parent object without access issues. Ownership is transferred only for direct child objects of the parent object.

Ownership is transferred after the successful export of all revisions of the object, including revisions not explicitly included in the export. Objects can be marked for ownership transfer when:

- The object is owned by your site and is not be replica object.

- The object is modifiable at the owning site.

- The object is not checked out.
- An administrator has specified that the object type can be marked for ownership transfer.

Ownership transfer is not available in the design context when using Supplier Collaboration.

Mark objects for ownership transfer

1. Select the objects to be marked for ownership transfer.
2. Select **More commands** ••• > **Manage** > **Transfer Ownership** to display the **Transfer Ownership** panel.
3. Select one of the following items.
   - Select **Teamcenter** if you are transferring ownership to a site managing its data with Teamcenter.
   - Select **Briefcase Browser** if you are transferring ownership to an unmanaged site.
4. Set **Target Site** to the name of the site to which you are transferring ownership.
5. Click **Transfer**.

   The objects are marked for ownership transfer. Ownership is transferred when the Briefcase file is exported.

View objects currently marked for ownership transfer

On the owning site, click **More commands** ••• > **View** > **Pending Ownership Transfers**. A list of all objects marked for ownership transfer is displayed. If you have an object selected and marked for ownership transfer, it is highlighted in the list.

Optionally filter the list of items by entering a specific target site. Only those objects with ownership marked for transfer to the specified site are displayed.

Cancel ownership transfer

On the owning site, click **More commands** ••• > **View** > **Pending Ownership Transfers**. A list of all objects marked for ownership transfer is displayed.

Select the items for which you want to cancel ownership transfer and select **Cancel Ownership Transfer** . Ownership is retained at the current site and is not transferred when the Briefcase is exported.

Preview and compare Briefcase files

Preview and compare Briefcase files to quickly inspect their contents before importing the data to your Teamcenter site. You can preview and compare briefcase files with each other or with the data in your Teamcenter database.

Preview a Briefcase file

Click a Briefcase file to inspect the Briefcase file's contents and information such as the file's name, description, owning site, and checkout status.

Briefcase contents can be mapped to different objects and structures upon import. You can preview how the Briefcase contents will appear after the mappings are applied by choosing the transfer option set with the appropriate transformation rules defined. The objects in the Briefcase preview are displayed according to the defined rules.

Compare Briefcase files

1. Choose **More commands** ••• > **View** > **Compare Briefcases** to display the **Compare Briefcases** panel. Specify Briefcase files to compare in any of the following ways:

   - Use any of the Search methods to find the Briefcase files you want to compare and drag the Briefcase files to the **Compare Briefcases** panel.

   - Instead of dragging the Briefcase files, you can click **Add** under **SOURCE** to search for the first Briefcase file to compare. Select the file and click **Add**. Perform the same steps to add a second Briefcase file under **TARGET**.

   - You can copy a Briefcase file using Active Workspace and then click **Paste** in the **Compare Briefcases** panel to specify the Briefcase as the **SOURCE** or **TARGET** Briefcase.

   - You can also select one or more Briefcase files before choosing **More commands** ••• > **View** > **Compare Briefcases**. The Briefcase files are automatically added to the **Compare Briefcases** panel.

2. Briefcase contents can be mapped to different objects and structures upon import. To compare Briefcase contents as they appear after mapping, choose **SOURCE** and **TARGET** transfer option sets that have the appropriate transformation rules defined. The objects in the Briefcases are transformed according to those rules before comparing.

3. Click **Compare**.

   A comparison of the two Briefcases is displayed. Expand and collapse the hierarchy of items to compare them. Color-coded bars identify changed objects in the briefcases:

   - Red identifies items not in the Briefcase or Teamcenter database.

- Green identifies new items.
- Yellow identifies items that are changed.

Compare a Briefcase file to your site's current Teamcenter data

1. Select the source Briefcase file to compare using any of the methods detailed in *Compare Briefcase files* earlier in this section.
2. Select **Current State** in the **TARGET** area of the **Compare Briefcases** panel and click **Compare**.

Comparing Briefcase files using **Current State** is available when using Teamcenter 13.3 or later.

Sharing data using PLM XML

PLM XML overview

PLM XML is an open standard for exchanging product life cycle information using several supported XML schemas. Data represented in these schemas includes product structure, geometry, visualization, features, application associativity, data ownership, and deltas (changes).

Export and import PLM XML when you need to share Teamcenter data with organizations not using Teamcenter or for use with third-party applications. You can use PLM XML to share Teamcenter objects such as items, datasets, BOMs, forms, and folders. You can also use PLM XML to share system data such as business rules and organization data.

Using transfer mode objects created using PLM XML/TC XML Export Import Administration, you can tightly control the scope, versions, and formats of the data being shared by applying closure (traversal) rules, filter rules, action rules, and property set rules.

Export data as PLM XML

You can export assemblies, subassemblies, and items as PLM XML. The PLM XML, along with any attached CAD (or other) data files, is exported to a *.zip* file for delivery to offline sites.

You can export objects of any type supported by the PLM XML schemas and specified by your administrator.

Export the data to a .zip file

1. Select the assembly, subassembly, or items to be exported and click **More commands** ••• > **Import/Export** > **PLM XML Export** to display the **PLM XML Export** panel.
2. Accept the default exported PLM XML file name or update it as necessary.
3. Select the transfer mode containing the rules appropriate for your export.

4. Specify the configuration rules to use when exporting the objects.

   - When you export from a product structure, the configuration rules specified for the entire product structure are used to configure the exported data. To change the configuration of the exported objects, adjust the revision and variant rules selected above the product structure as appropriate.

   - When you export from outside of a product structure (for example, from search results or a folder), specify the rules used to configure the exported data in the **PLM Export** panel as appropriate.

5. (Optional) Specify export languages to export as appropriate.

6. Click **Export** to create the exported PLM XML file. The export begins and you receive an alert when the export is complete.

Review the export report

You receive a report alert when your export completes. Click the alert to view the export report. Access all recent alerts from the **Subscription** tile.

The **Properties** section of the report includes details about the export such as the type of export, export completion status, and transfer mode used. Under **Related Objects**, click on the export log entry to view a detailed list of actions and results from the export.

Transfer the exported .zip file

The **Target Object** section of the export report contains a link to the *.zip* file containing the exported PLM XML. Download the file and transfer it to the target site by email or other means.

Import PLM XML data

You can import objects and assemblies as PLM XML. The PLM XML, along with any attached CAD (or other) data files, is imported from a *.zip* file. This *.zip* file can be one that was previously created by exporting data to PLM XML using Active Workspace. If the *.zip* file was created using the Teamcenter rich client or another application, ensure that the *.zip* file meets the following criteria:

- The *.plmxml* file in the root of the *.zip* file must have the same base name as the *.zip* file.

- The folder containing dataset files in the *.zip* file must have the same name as the *.zip* file's base name.

Import objects in a PLM XML .zip file

1. Select the folder into which you wish to import the contents of the *.zip* file.

Be aware that even when your site is configured to copy the root objects of the import file to a new folder under the Newstuff folder, the data is still imported into this selected folder and not the **Newstuff** folder. (This result is different than when importing PLM XML using the Teamcenter rich client.)

If the PLM XML was created by an application other than Teamcenter, be aware of how root objects are imported by Active Workspace:

- Imported root objects are determined by the **traverseRootRefs** value of the **Header** element in the *.zip* file's *.plmxml* file.
- If the *.plmxml* file contains no **traverseRootRefs** value, all of the **WorkspaceObjects** in the *.plmxml* file are treated as root objects.
- When importing a **BOMLine**, its underlying **Item** is treated as the root object.

2. Click **More commands** ••• > **Import/Export** > **Import PLM XML** to display the **Import PLM XML** panel.

3. Use **Choose File** to locate the *.zip* file on your local system.

4. Select the transfer mode containing the rules appropriate to use when importing the file.

5. Click **Import** to import the objects in the *.zip* file. The import begins and you receive an alert when the import is complete.

Review the import report and objects

You receive a report alert when your import is complete. Click on the alert to view the report. (Access all recent alerts from the **Subscription** tile.)

Related Objects shows the folder in which the objects were imported, In **Target Object**, view a detailed list of actions and results during the import.

Open the Active Workspace folder in which the objects were imported and review the imported structure.

Sharing data using PDX files

Using PDX files

Export your Teamcenter data in PDX format when you want to share product data and attachments with business partners who are not running Siemens Digital Industries Software products.

PDX (Product Data eXchange) data is a standardized file format that can be viewed by PDX viewer applications such as PDXplorer, or used by other systems that support the PDX data format.

Exported PDX data includes assemblies, objects, and attachments. The exported data is packaged in a compressed file ready for delivery to business partners.

For information about configuring and customizing the PDX export from Active Workspace, in the *Teamcenter Administration* help, see *Configure PDX data sharing*.

To export data as PDX files using Active Workspace, in the *Active Workspace Fundamentals* help, see *Share objects as PDX files*.

Share objects as PDX files

PDX (Product Data eXchange) data is a standardized file format that can be viewed by PDX viewer applications such as PDXplorer, or used by other systems that support the PDX data format. You can share Teamcenter data as PDX files using Active Workspace.

1. Locate and select one or more objects or assemblies from your site to share as PDX data. You can select and share only objects of the types allowed by your site as PDX data.

   If you select more than one line within an assembly, the entire assembly is exported.

   If you select multiple assemblies or items from separate assemblies, the exported file contains multiple root assemblies.

2. Click **More commands** ••• > **Import/Export** > **Export PDX**. The **Export PDX** panel is displayed listing several properties that must be set to export the Teamcenter data.

3. From the **Transfer Option Set** list, select the transfer option set to use when sharing objects as PDX data. The transfer option set defines the scoping rules for exporting your data to PDX. The available option sets can be used only to export PDX data, and vary depending on your site's configuration.

4. Your Teamcenter data is exported in a single compressed file. Specify a file name for the exported PDX file.

5. Specify the configuration rules to use when exporting the objects.

   - When you export from a product structure, the configuration rules specified for the entire product structure are used to configure the exported data. To change the configuration of the exported objects, adjust the revision and variant rules selected above the product structure as appropriate.

   - When you export from outside of a product structure (for example, from search results or a folder), specify the rules used to configure the exported data in the **Export PDX** panel as appropriate.

6. Optionally limit the number of BOM levels exported to PDX by setting **BOM Levels to Export** to a value of **1** to the maximum level of the structure.

7. If **Vendor Filter** is available, click it to select the vendors for which info is exported. Selecting no vendors will exclude all manufacturer parts and contact information for all vendors related to the selected objects or assemblies from being exported.

   If **Vendor Filter** is not available, manufacturer parts and contact information for all vendors related to the selected objects or assemblies is exported.

8. Review and adjust the transfer options by clicking **Override Options** on the **Export PDX** panel. The available options vary depending on the configuration of the selected transfer option set. The settings you choose remain selected for future PDX exports in your current session our until you clear your browser cache.

9. Click **Export** to create the exported PDX file. The export begins and you receive an alert when the export is complete.

Review the export report

You receive a report alert when your export completes. Click the alert to view the export report. Access all recent alerts from the **Subscription** tile.

The **Properties** section of the report includes details about the export such as the type of export, export completion status, and transfer option set used. Under **Related Objects**, click on the export log entry to view a detailed list of actions and results from the export.

Transfer the exported .pdx file

The **Target Object** section of the export report contains a link to the *.pdx* file containing the exported data. Download the file and transfer it to the business partners who are not running Siemens Digital Industries Software products.

Sharing data using Multi-Site Collaboration

Multi-Site Collaboration overview

Multi-Site Collaboration is an optional feature installed by your administrator. It enables you to securely share and manage product data across multiple sites in your enterprise.

With Multi-Site Collaboration, primary Teamcenter objects exist at one site (the owning site). You can **publish primary objects**, making them available to other sites in your organization (remote sites) for use. You can then **share these objects for replication at specific remote sites**, choosing options such as transferring ownership with the objects, sharing only certain versions of objects, and sharing BOM structures related to the objects. Remote sites then **receive the objects**, which are stored as object replicas at those sites.

Sharing data using Multi-Site Collaboration delivers several benefits:

Provides access to data across the enterprise

Store, locate, view, and use information from any site within your Multi-Site federation; create references among objects at multiple sites; and build product structures using assemblies and subassemblies from multiple sites.

Ensures data integrity

When an object is initially created and saved, that instance is considered the primary object unless there is a transfer of ownership. Updates between primary objects and replicas are synchronized. Only the primary object can be replicated. You cannot replicate replicas.

Provides data security

To ensure that no unauthorized replicas are created, specific sites are authorized to take transfer of ownership. Tracking information is stored with the primary object if it is transferred.

Supports auditing and tracking

To ensure that there is only one instance of a primary object, only one site can accept transferred ownership. A primary object cannot be deleted until all replicas are deleted. This ensures referential integrity across the Multi-Site federation.

Administrators can view and analyze your organization's history of Multi-Site transactions using charts, graphs, and detailed object reports. See Monitor data exchange transactions.

Publish objects for access from remote sites

Sites in a distributed network must have some reliable way of controlling which data they want to share with the rest of the network. With **Multi-Site Collaboration**, you control this by publishing and unpublishing objects.

Publishing objects

Publishing an object makes that object available to other sites, allowing them to make local replicas of the object. When you publish an object, a publication record is created in the ODS (Object Directory Services) database that can then be read and searched by other Multi-Site Collaboration sites. Until you publish an object, it can only be accessed at the local owning site. Other sites cannot access the object.

Publish an object by selecting it, clicking **More commands** ••• > **Share** > **Publish**, and checking one or more servers to use for publishing. (If your site uses more than one server, consult with your system administrator for recommendations on the best server to use.) Once published, you can **transfer the object** to remote sites.

Unpublishing objects

Unpublishing an object reverts an object to be accessible only by the local owning site.

Unpublish an object by clicking **More commands** ••• > **Share** > **Unpublish** and checking the servers from which the object is to be unpublished. Once unpublished, if the object is still replicated on a remote site, it will be shown with a 🌐. Hover over the 🌐 to see the object's status. A best practice is to remove replicas of unpublished objects from remote sites.

Share objects with other sites using Multi-Site Collaboration

If your organization is using **Multi-Site Collaboration**, you can share objects from your (local) site with other (remote) sites in your Multi-Site network, creating replica objects at these other sites. When sharing, you can specify how site ownership, object ownership, and other transfer options are handled. **Local objects must be published** to be shared using Multi-Site Collaboration.

Use the following steps to share objects from your site with a remote site.

1. Locate and select an object from your site to share.

   When you search for items, search results include ItemRevision object types by default. Consider using **Advanced Search** to locate Item object types.

   To share a specific revision of an object, select the revision on the **History** tab. You can also choose an item from the **Where Used** tab and select a specific revision or all revisions of the object.

2. Click **More commands** ••• > **Share** > **Share with Sites**. The **Share with Sites** pane is displayed listing target sites and several transfer options.

3. From the **Destinations** list, check one or more remote sites to be used as target destinations when transferring the selected object. The **Destination** list filters as you type; type the first few characters of the site's name to display the site you want.

4. For **Option Set**, select the transfer option set to use when sharing objects. The transfer option set defines the configuration rules when transferring data between sites. The available option sets vary depending on your site's configuration.

5. Use the following information to update the remaining settings on the **Share with Sites** pane as necessary. Then, click **Share** to share the selected objects with the destination sites. You receive a notification when the transfer completes.

Transfer site ownership to the destination site

To transfer site ownership of the selected objects to the destination site, click **Transfer Site Ownership**. When you transfer site ownership, all revisions of an item will be shared.

If you transfer an item revision with a sequence, its sequence manager is also transferred.

Siemens Digital Industries Software recommends that you leave **Transfer Site Ownership** unchecked.

Share only modified objects

To share a workspace object only when it has been modified since the last time it was exported to the destination site, click **Modified Only**.

For example, if only the specification dataset was modified, the specification dataset is shared and the remaining items are not. When sharing with multiple destination sites, an object is shared if it has been modified since the last export to any of the selected destination sites.

Share different or additional revisions

When you click **More commands** ••• > **Share** > **Share with Sites** with an item selected, you can share that item or choose to share a specific revision of the item such as the latest revision, latest working revision, latest release revision, and so on. On the **Share with Sites** pane, select the revision of the item to share from the **Revision** list.

When you click **More commands** ••• > **Share** > **Share with Sites** with a specific item revision selected, you can share that revision. Optionally, click **All Revisions** on the **Share with Sites** pane to share all versions of the selected item revision.

Share an item and BOM

When you click **More commands** ••• > **Share** > **Share with Sites** with an item revision selected, you can share that item along with a related configured BOM structure. On the **Share with Sites** pane, check **Include Structure** and select the revision and variant rules defining the appropriate revisions of parts and assemblies in the product structure to share.

If you check **Include Structure** with **All Revisions** selected, the related unconfigured BOM structure is shared.

Share item relations

An item or item revision can be related to data, such as datasets, forms, folders, and other items and item revisions. Relations describe how the other data is associated with the item or item revision.

To share related data, from the **Relations** list on the **Share with Sites** pane, check each object relation to also share with the destination sites.

Change ownership of shared objects

Optionally change the owner of the transferred object once it is transferred to the remote site. Under **OWNER** on the **Share with Sites** pane, click **Replace**, check the new owner, and click **Replace**.

Modify transfer options

Review and adjust the transfer options by clicking **Override Options** on the **Share with Sites** pane.

The available options vary depending on the configuration of the selected transfer option set. You can modify the options available to override by editing the transfer option sets as described in *PLM XML/TC XML Export Import Administration*.

Receive and update objects from remote sites using Multi-Site Collaboration

Use the following steps to import objects recently shared to your site and to update replica objects at your local site. When updating, you can specify how site ownership, object ownership, and other transfer options are handled.

Use the following steps to share objects from your site with a remote site.

1. Locate and select one or more replica objects. Replicas on your site are identified with a . Hover over the to see the name of the remote site.

   Objects in a product structure that have not yet been received from their sites will be listed with the name **<REMOTE OBJECT>**.

2. Click **More commands** > **Share** > **Receive from Site** . The **Receive from Site** pane is displayed listing several transfer options.

3. Select the transfer option set to use when receiving the objects. The transfer option set defines the configuration rules when transferring data between sites. The available option sets vary depending on your site's configuration.

4. Use the following information to update the remaining settings on the **Receive from Site** pane as necessary. Then, click **Receive** to update the selected objects at your site. You receive a notification when the update completes.

   To view the updated objects in a product structure, click **Expand** > **Unpack All**.

Transfer site ownership to your site

To transfer site ownership of the selected objects to your site, click **Transfer Site Ownership**. When you transfer site ownership, all revisions of an item will be shared.

If you transfer an item revision with a sequence, its sequence manager is also transferred.

Siemens Digital Industries Software recommends that you leave **Transfer Site Ownership** cleared.

Update only modified objects

To update a workspace object only when it has been modified since the last time it was received, click **Modified Only**.

Update different or additional revisions

When you click **More commands** ••• >**Share** > **Receive from Site** with an item selected, you can update that item or choose to update a specific revision of the item such as the latest revision, latest working revision, and latest release revision. On the **Receive from Site** pane, select the revision of the item to update from the **Revision** list.

When you click **More commands** ••• > **Share** > **Receive from Site** with a specific item revision selected, you can share that revision. Optionally, click **All Revisions** on the **Receive from Site** pane to update all versions of the selected item revision.

Update an item and BOM

When you click **More commands** ••• > **Share** > **Receive from Site** with an item revision selected, you can update that item along with a related configured BOM structure. On the **Share from Site** pane, check **Include Structure** and select the revision and variant rules defining the appropriate revisions of parts and assemblies in the product structure to update.

If you check **Include Structure** with **All Revisions** selected, the related unconfigured BOM structure is updated.

Update item relations

An item or item revision can be related to data, such as datasets, forms, folders, and other items and item revisions. Relations describe how the other data is associated with the item or item revision.

To update related data, from the **Relations** list on the **Receive from Site** pane, check each object relation to also update.

Modify transfer options

Review and adjust the transfer options by clicking **Override Options** on the **Receive from Site** pane.

The available options vary depending on the configuration of the selected transfer option set. You can modify the options available to override by editing the transfer option sets as described in *PLM XML/TC XML Export Import Administration*.

Check out and check in objects when using Multi-Site Collaboration

When using Multi-Site Collaboration, Siemens Digital Industries Software recommends you check out and modify only master objects. The check-out and check-in of objects managed with Multi-Site Collaboration **is the same as in the case of other objects**.

If necessary, you can also check out and modify replica objects (identified with a) on other sites in your Multi-Site federation. When checking out and checking in replica objects, be aware of the following items:

- When you check out and check in a remote item, certain related objects such as item revisions and datasets are also checked out and checked in. The list of related items checked out and checked in is determined by the values specified in the **MultiSiteCICORule** closure rule.

- You cannot directly check out and check in remote objects from Structure Manager. Check the remote objects in and out from outside of the product structure. For example, select the object in the product structure, click the **History** tab, select the object, and click **More commands** ••• > **Edit** > **Checkout**.

- When a replica object is checked out at a remote site, the object cannot be checked out at the master site.

- When you check in replica objects, the updated data is sent to the master site. Doing so ensures consistent data across your organization.

- When you check in a modified structure, you are prompted whether to check in the entire structure and whether to retain ownership of the components at the master site.

When checking in replica objects, you have the following options:

Check in an item revision and BOM

Check **Include Structure** to check in the item revision and any other new or changed components in the related configured BOM structure.

Retain object ownership of new components

To keep site ownership local for any newly created objects being checked in, click **Retain Ownership of Components**. If not, ownership of the newly created objects is transferred to the primary site upon checkin.

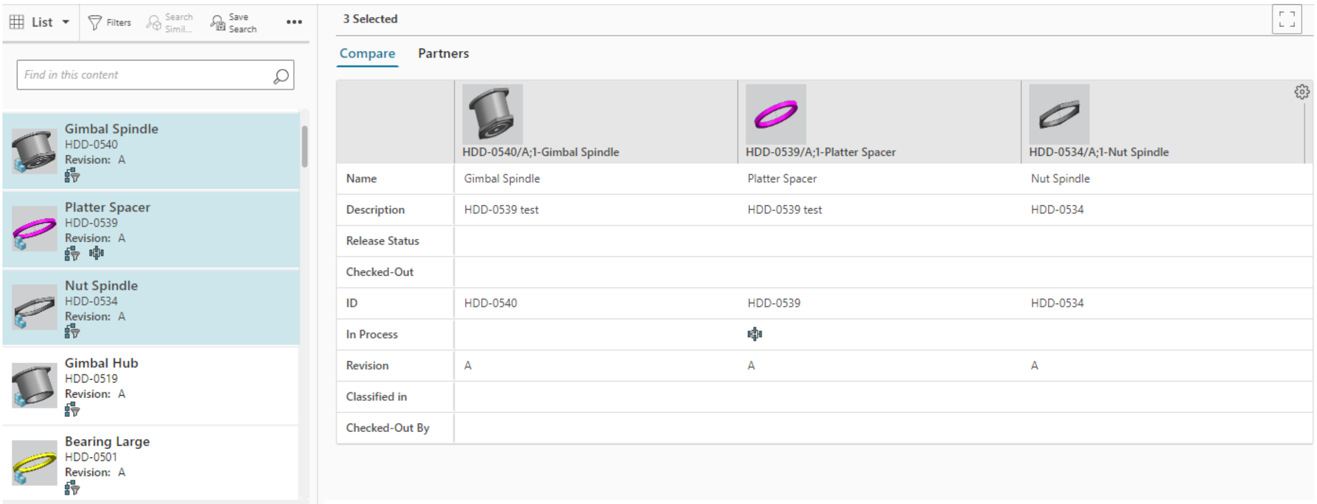
Check in data linked to the object using relations

To check in changes to related data, such as datasets, forms, folders, and other items and item revisions, from the **Relations** list, select each object relation to also check in at the remote site.

Comparing object properties

You can compare common properties of objects.

- Select multiple objects from the list.



Note:

While in a comparison display from a list, you can use the list to select additional objects or remove objects.

- To arrange properties in a comparison display, click **Table Settings** to the right of the column headings and choose **Arrange** to display the **Arrange** panel.

Note:

The columns available for display are specified by administrators.

When you navigate away from a comparison display, changes made using the **Arrange** panel are not retained.

Alternately, to change the column order for closer comparison to another column, click and hold in the header row, and then drag the column to the desired location.

Note:

While in a comparison display, you can select a column and click **Information** to display the object panel to edit properties for that object, or use any other available command and complete the desired action.

Tracking changes to objects

As an object goes through the change process, the changes (additions, modifications, revisions, deletions, and replacements) can be tracked to make it easier for you to see what properties of the object were modified as part of the requested change. You can view these changes by clicking **View** > **Show Redlines** on the object.

> Note:
>
> The changes are highlighted only if your site administrator has enabled change highlighting in the system configuration.

When you show redlines, changes are displayed on the object using the following highlighting methods:

- Deleted parts are highlighted with a red strikethrough.
- Added parts are highlighted with a green italic font.
- For replaced or revised parts, old and new values are shown side by side.

For more information on tracking changes, in the *Change Management* help, see *Review active or closed changes for a structure*.

Synchronize workflow tasks in Outlook

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

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

Generating and viewing reports

Generate and view predefined reports

Generating reports using Teamcenter predefined reports

You can use Teamcenter predefined reports to generate various types of item, summary, and custom reports.

Summary and item reports are static reports. They are generated from the persistent properties in a database. Custom reports are dynamic reports and are generated from the runtime properties in a database.

- *Item report*: These are generated in the context of a specific object, for example, reports that show the BOM list for an item or the workflow sign-off for an item.
- *Summary report*: These reports collate and summarize similar information, for example, reports that show entries for all the employees, the items belonging to a user, or the release status of items. These are generated from Teamcenter saved queries and you need not have to select any objects to run these reports.
- *Custom report*: These reports address special cases such as complex processing or calculations done through custom code or API functions, or when the data comes from external sources. For example, the *reports administrator* can create a custom report that generates and displays the BOM line attributes of a product structure. The BOM line information in the report you generate can change depending on the type of revision rule applied before generating this report.

Generating reports using Reporting and Analytics

If Reporting and Analytics is installed and deployed in your Teamcenter environment, you can:

- Define and create new Reporting and Analytics reports.
- Edit reports, charts, and layouts without launching a separate application.
- Configure charts with customized styles, dimensions, and measures.

Generate an item, summary, or a custom report

You can generate an **item report**, **summary report or a custom report**, or **Reporting and Analytics reports**.

Generate an item report

1. Search for an item and select the item revision.

2. Choose **More Commands** ••• > **New** > **Generate Report**.

3. Select a predefined report.

4. Specify the appropriate criteria or make the appropriate selections.

5. Select a style sheet.

   You can select a style sheet with an **_html** or an **_excel** suffix to generate the report in HTML or MS Excel format, respectively.

6. (Optional) To save a report, specify a file name in the **Save to File Name** box.

   You can view this report later from the **My Reports** or the **Printouts** tab.

7. (Optional) To generate the report asynchronously, select the **Run in Background** check box.

   By default, this check box is selected if the reports administrator has enabled the **Run in Async** check box while defining a report.

8. To create the report, click **Generate**.

9. To access your saved or asynchronously generated reports, click the **PRINTOUTS** tile on the home page.

   The reports are available from the **Printouts** tab.

   Some reports can be generated only asynchronously. This depends on how the administrator configures the report template at your site. Asynchronously generated reports are available from the **Printouts** tab.

Generate a summary report or a custom report

Currently, there is no command to select a summary or custom report specifically. When you select a report from the **Templates** tab, the **Overview** tab displays the properties of the report including the name and the description. **Type: 0** indicates a summary report and **Type: 2**, a custom report.

1. On the **HOME** page, click the **REPORTS** tile.

2. Click the **Templates** tab, select a summary or custom report, and click **Open**.

   Alternatively, click the **Templates** tab, select a summary or custom report, and choose **More Commands** ••• > **New** > **Generate Report**.

3. To quickly access a summary or custom report, click **Search**, for example, *change*. Then, select the report and click **Open**.

4. For summary reports, specify the appropriate criteria or make the appropriate selections in **REPORT FILTERS**.

5. Select a style sheet.

   You can select a style sheet with an **_html** or an **_excel** suffix to generate the report in HTML or MS Excel format, respectively.

6. (Optional) To save a report, specify a file name in the **Save to File Name** box.

   You can view this report later from the **My Reports** or the **Printouts** tab.

7. (Optional) To generate the report asynchronously, select the **Run in Background** check box.

   By default, this check box is selected if the reports administrator has enabled the **Run in Async** check box while defining a report.

8. To create the report, click **Generate**.

9. To access your saved or asynchronously generated reports, click the **PRINTOUTS** tile on the home page.

   The reports are available from the **Printouts** tab.

   Some reports can be generated only asynchronously. This depends on how the administrator configures the report template at your site. Asynchronously generated reports are available from the **Printouts** tab.

Generate Reporting and Analytics reports

If Reporting and Analytics is installed and deployed, you can generate a new report or view a snapshot. A *snapshot* is a report that contains layout information and query results retrieved at a specific point in time. Snapshots are automatically created based on a schedule and saved to a location or server. You can analyze multiple snapshots, captured on previous occasions, to help identify trends based on historical data.

> Note:
>
> Reporting and Analytics is not supported for custom reports.

1. Click **New** to generate a new report, specify filter criteria, and click **Run** to generate the report.

   OR

Click **Add to Queue** to add the report to the queue to generate the report in the background. You receive an email with the link to the report after successful completion. The generated report is also available in the **Snapshots** area.

2. (Optional) To edit a Reporting and Analytics report, open the report, click **Settings** and then click **Edit** on the toolbar.

3. (Optional) Add new widgets, styles, dimensions, and measures to the report.

4. Click **Save** to save your changes.

5. (Optional) To export the report as an email, PDF, HTML, Excel, PowerPoint, or a text file, click **Settings** and select the format to which you want to export.

Generate active reports

Active reports overview

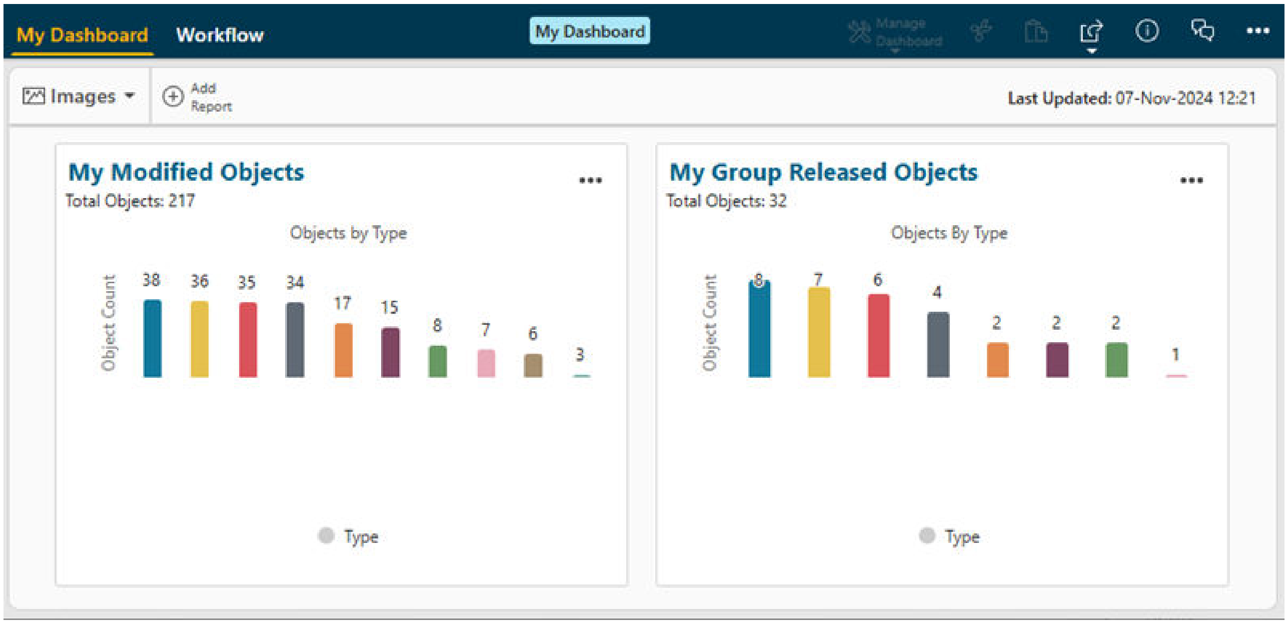
Active reports are report *definitions* that identify the content you want to include in reports. You can create report definitions for active summary reports and active item reports dynamically and add them to the database. You can select a layout and add charts and a table. After previewing and saving an active report, you can search for it and rerun the saved report to fetch the latest data from the database.

- *Active summary reports* collate and summarize similar information, for example, reports that show entries for all the employees, the items belonging to a user, or the items released in the current month.

- *Active item reports* are generated in the context of a specific object, for example, reports that show all solution items for a selected **Change Revision** or all attachments for a selected **Item Revision**.

Some business objects such as programs do not have the **Reports** tab enabled by default. In such cases, you cannot view the **Active item report**. The reports administrator or a user with DBA privileges can modify style sheets to enable this tab. For more information, see *Report Builder* on Support Center.

View My Dashboard reports

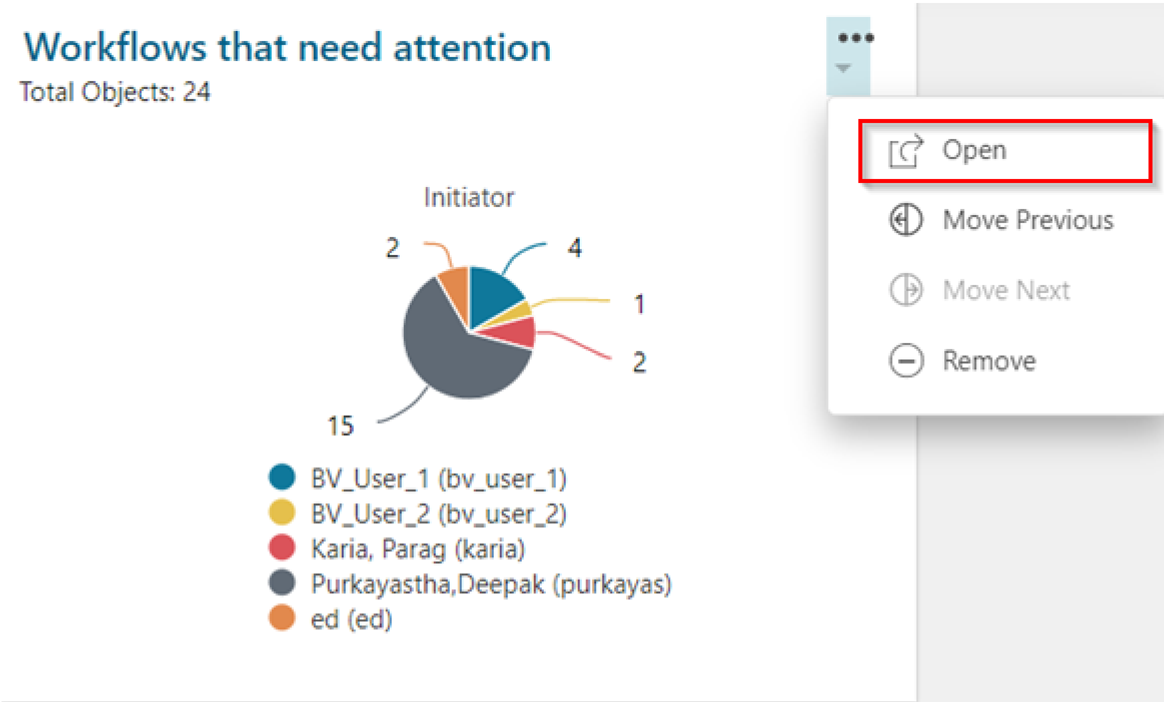


1. On the **Home** page, click the **Reports** tile.

   By default, the available reports are displayed as thumbnails in **My Dashboard**.

2. To open the report, hover over the report title until a link appears, and click the title link to open it.

   Alternatively, click **More Commands** > **Open**.

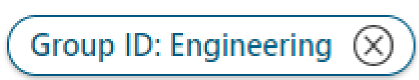


3. Drill down the report to find specific data.

   Example:

   a. Open the **My Modified Objects** report.

   b. In the **Objects By my Login Group** pie chart, click the area specific to a group, for example, the **Engineering** group. The chart and the table area show objects specific to the **Engineering** group. Click the following button to close this view.

   c. In the **Objects by Type** area, click the **Item Revision** line chart. The **Item Revision** chart area shows the **Objects By my Login Group** pie chart specific to item revisions.

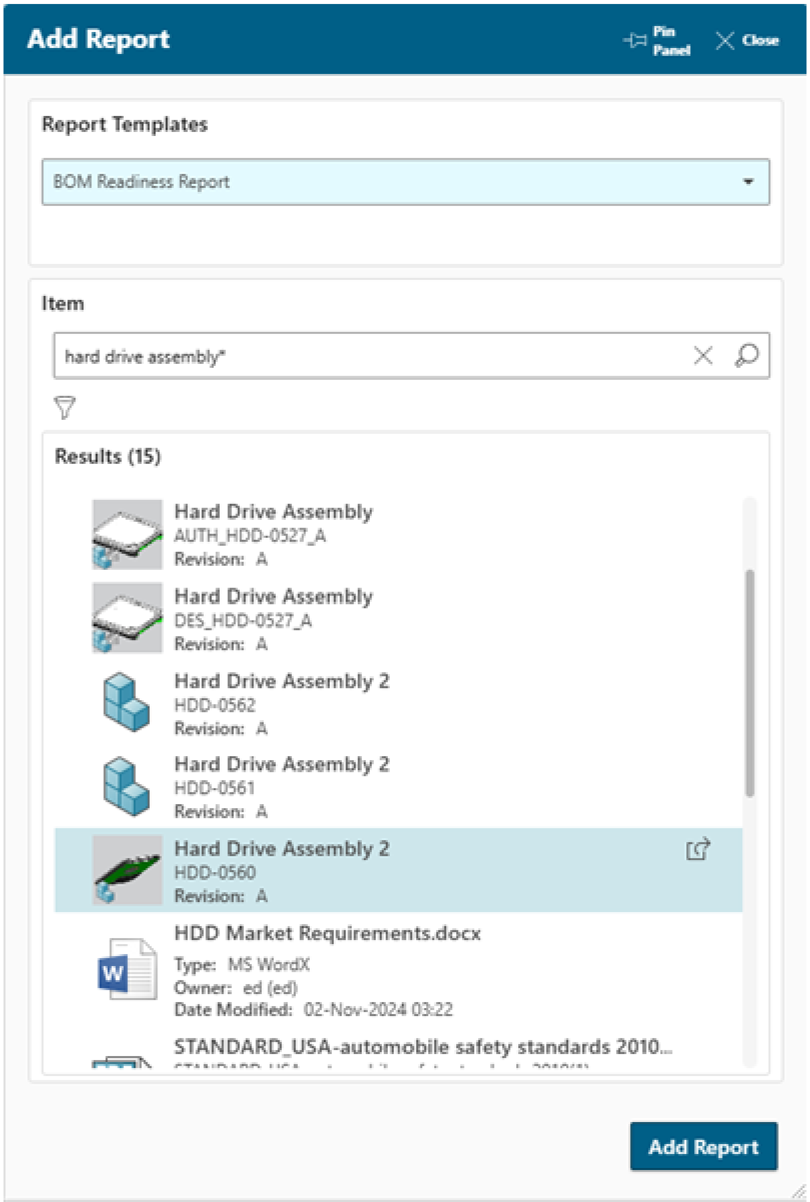
      The table shows the item revisions by name, ID, group ID, and the last modifying user. If the objects have a release status, the **Object by Release** pie chart displays how many objects are unassigned or released.

4. (Optional) Open the report and if the report contains data in a tabular format at the bottom, click the table header of the column you want to sort and choose the appropriate option. You can also select an operator for further filtering. The valid operators are **Contains**, **Does not contain**, **Begins with**, **Ends with**, **Equals**, and **Does not equal**. For example, for a BOM readiness report, you can select **Contains** and type **released** to find the released item revisions.

5. (Optional) To remove the report from **My Dashboard**, select the report tile, choose **More Commands**, and select **Remove**.

6. To add a report from **My Dashboard**, click **Add** ⊕, search for the report in the **Add Report** panel, select it, and click the **Add** button.

   If you select an active item report, you must specify the item related to this report. To do so, click the **Add** button in the **ITEM** area of the **Add Report** panel, search for the item, select it, and click the **Add Report** button.



7. Display the table tile on **My Dashboard**.

   You can optionally display the table tile on **My Dashboard** for an existing summary or item report.

You can open an object or sort, hide, or freeze columns directly from the table tile. Additionally, you can select multiple objects from the table tile, copy them, or add them to **My Changes**, or perform some other similar action.

a. In **Templates**, select the report for which you want to display the table tile on **My Dashboard**.

b. Choose **More Commands** > **Edit** > **Edit Report** and select **Set Layout**.

c. In **Table**, if you have not selected columns, select them as appropriate, select **Template**, click **Edit**, select **Table** from **Thumbnail** list, and click **Save**.

In reports, you can set one of the three charts or the table as the thumbnail.

d. Navigate to **My Dashboard**.

The report you modified displays the table tile.

8. Directly edit the report columns for reports with tables as thumbnails.

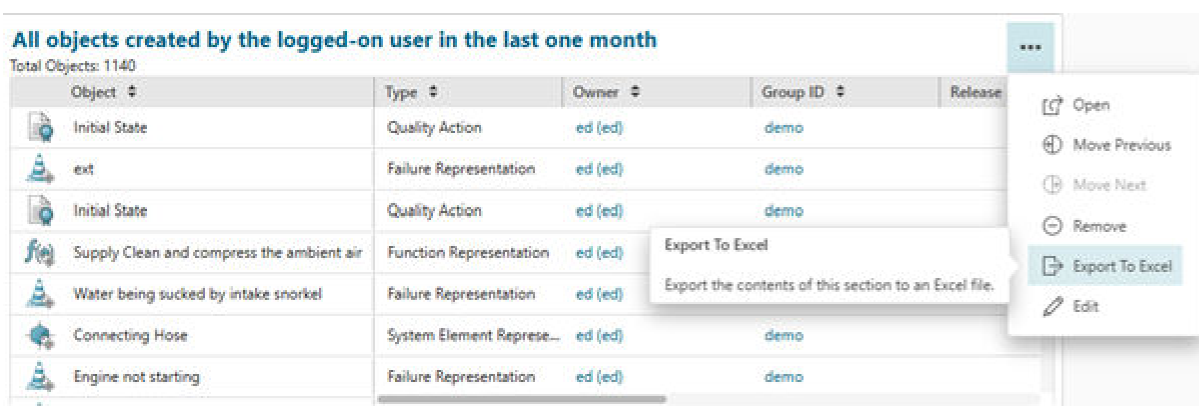
a. To edit report columns directly from the dashboard view, select a report with a table as a thumbnail, click **More Options** > **Edit**.

b. Click the appropriate editable column and make the necessary changes.

c. To save your changes, click **More Options** > **Save Edits**.

9. Export reports with tables as thumbnails to Microsoft Excel directly from the dashboard view.

a. To perform an export to directly from the dashboard view, select a report with a table as a thumbnail, click **More Options**, and choose **Export to Excel**.



b. To add properties, click **Add Properties** to add or remove additional properties that you want to display in the exported spreadsheet.

c. Click **Downloads** in your browser to open the exported file.

Duplicate an existing template and modify it to create a new report

Only the owner of the templates can edit them. However, other users can duplicate existing templates and modify them to create new reports.

1. On the **Home** page, click the **REPORTS** tile.
2. Choose the **Templates** page, search for the template you want to duplicate, and select it.
3. To duplicate the template, choose **More Commands** ••• > **New** > **Save As** .
4. Change the name, description, and ID as appropriate, and click the **Save** button.

   You cannot edit default report templates containing custom data providers such as **Workflows initiated by my groups**.
5. Search and open the template you duplicated.
6. Choose **More Commands** ••• > **Edit** > **Edit Report** .
7. Make the required changes and save the template.

Share report templates across users, roles, groups, and projects

You can share the templates you create across users, roles, groups, and projects.

When you create a report template, it is not available by default for other users to use. You must share report templates you create across users, roles, groups, and projects. The report templates you share are available in the **Templates** tab and the **Generate Report** panel.

Procedure

1. On the **Home** page, click the **Reports** tile, and choose **Templates**.
2. Search for the template you have created, select it, and choose **More Commands** > **Share** > **Share**.
3. To share this template with all users, choose **All users (Public)**.
4. Share this template with selected users.

   You can share templates with selected users, roles, or groups in the organization, or across projects.

   a. To share this template with selected users, choose **Selected users only**.

b. From the **Available** section, select **Users**, **Organization**, or **Projects** as appropriate.

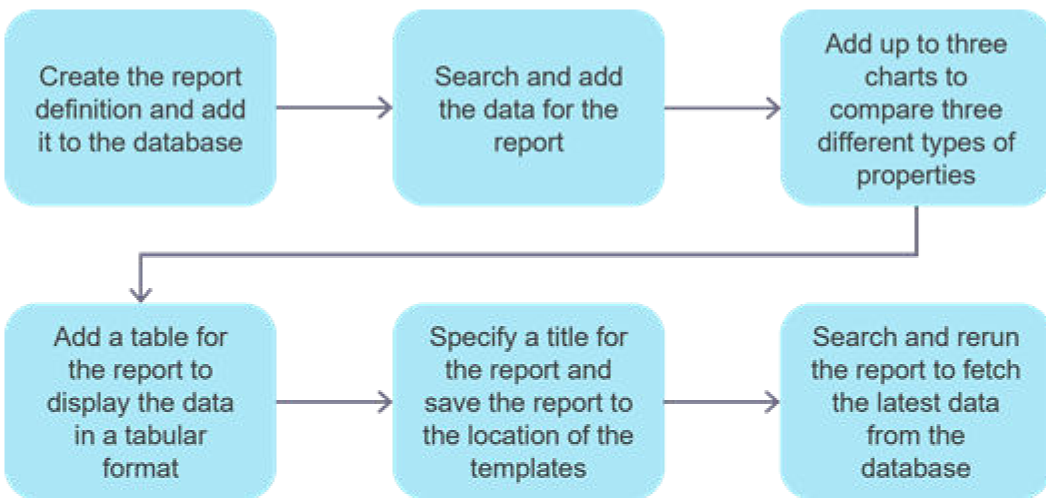
c. Make the appropriate selections from **Available** and click > to move them to **Shared With**.

5. To share the template, click **Save**.

Create and generate an active summary report

You can create summary reports to collate and summarize similar information, for example, reports that show entries for all the employees, the items belonging to a user, or the release status of items.

The process for creating and generating an active summary report is as follows:



Example:

Create a report for all business objects created by the current logged-on user for the current month. This is a generic report and it can be used by another user to view the business objects created by that user.

Procedure

1. (Optional) Create the report definition and add the data for the report.

   a. On the **HOME** page, click the **REPORTS** tile.

   b. In **My Dashboard** or **Templates**, choose **More Commands** ••• > **New** > **Create Report**.

   c. To create a summary report, from the **Type** list, select **Active summary report**. This is the default type.

   d. Search for the data you want in the report.

In this example, a report is created for all business objects created by the current logged-on user for the current month.

A. In the **Search Data** panel, search for the data you want to include in the report.

For example, type **Owner:$ME** and click **Search** to fetch all the objects owned by the currently logged-on user. The keyword for this is **$ME**.

To further filter your search criteria, for example, to fetch all objects created this month, modify the query as **Owner:$ME AND "Creation Date":$THIS_MONTH** and click **Search**.

Search criteria examples:

All item revision objects created in the last seven, fourteen, or thirty days	• **ItemRevision AND "Date Modified":$LAST_7_DAYS** • **ItemRevision AND "Date Modified":$LAST_14_DAYS** • **ItemRevision AND "Date Modified":$LAST_30_DAYS**
All item revision objects created in the current or last one year	• **ItemRevision AND "Date Modified":$THIS_YEAR** • **ItemRevision AND "Date Modified":$LAST_YEAR**
All objects created by the logged-on user in this month or last one month	• **Owner:$ME AND "Date Modified":$THIS_MONTH** • **Owner:$ME AND "Date Modified":$LAST_MONTH**
All released objects in the last three months	**"Release Status":* AND "Date Released":$LAST_3_MONTHS**
Dashboard for objects modified by the logged-on user in the current year	**"Last Modifying User":$ME AND "Group ID":$MY_GROUP AND "Date Modified":$THIS_YEAR**
All change requests, change notices, or problem reports created in the current year	**ChangeRequestRevision AND "Creation Date":$THIS_YEAR** OR **ChangeNoticeRevision AND "Creation Date":$THIS_YEAR** OR **ProblemReportRevision AND "Creation Date":$THIS_YEAR**

B. To include the data in the report, click **Save**.

2. Select a layout for the report and add charts.

   You must first create the report definition and add the data for the report before you can select a layout and add charts and a table.

   a. Specify a report title.

   b. Specify the number of charts you want to add for this report by selecting the appropriate option.

   c. Select **Bar Chart**, **Pie Chart**, or **Line Chart** for the type of chart you want to create.

   d. To create a layout for the report, click **Edit** above the chart.

   e. To add a property for the chart, from the **Chart On** list, select a value, for example, **Status**.

   f. Specify a title for the chart type or accept the default title.

   g. To save this chart type, click **Save**.

   h. To add the second and third charts, repeat the above steps. You can choose other properties for the second and the third chart, for example, **State** and **Priority**, respectively.

      You can add additional chart properties depending on how the administrator has configured your Teamcenter environment. Consult your administrator for more information.

   i. After creating more than one chart, to move the chart, click **... More Commands** and select the appropriate option.

3. To display the data in a tabular format, add a table for the report.

   a. In the **Table** area, click **Table Settings** > **Arrange**.

   b. From **Available Columns**, select column name properties such as **Object**, **Task Type**, **Description**, **State**, and **Status**, and click > to move them to **Displayed Columns**.

   c. (Optional) To rearrange the columns in the table, in the **Column Name** area, select a column name, click the column widget, and move the column up or down.

   d. To save the column arrangement, click **Arrange**.

Note:

(Optional) You can add additional columns to the table depending on how the administrator has configured your Teamcenter environment. Consult your administrator for more information.

4. Save the report as a template.

   a. To save the report as a template, click **Save as Template**.

   b. (Mandatory) Specify a name for the report.

   c. (Optional) Include a description.

   d. (Mandatory) Specify an ID for the report or accept the default ID for the report.

   e. (Optional) Specify a Thumbnail for the report or accept the default value.

   f. (Optional) To include the report in **My Dashboard**, select the **Add to Dashboard** check box.

   g. Click **Save**.

5. Edit the report from the **Templates** page.

   a. Navigate to the **Templates** location.

   b. Search for the report definition you want to edit, select it, and choose **More Commands** ••• > **Edit** > **Edit Report**.

   c. Make the necessary changes and save the report.

6. Generate the report.

   a. From the **Templates** page, select the report you want to generate.

   b. To generate the report, click **Open**.

      The report is generated by fetching the latest data from the database.

7. Export the table area of the report to Microsoft Excel.

   a. To open the report from any dashboard, hover over the report title until a link appears, and click the title link to open it. Alternatively, select the report and click **More Commands** > **Open**.

From **Templates**, select the report and click **Open**.

b. Click **Export to Excel** above the table area of the report.

c. Click **Add Properties** and deselect the properties that you do not want to be displayed in the exported report.

d. To download the report, click **Export**.

e. Click **Downloads** in your browser to open the exported file.

Perform a search and convert the search results to an active summary report

You can perform a search and convert the search results to a summary report.

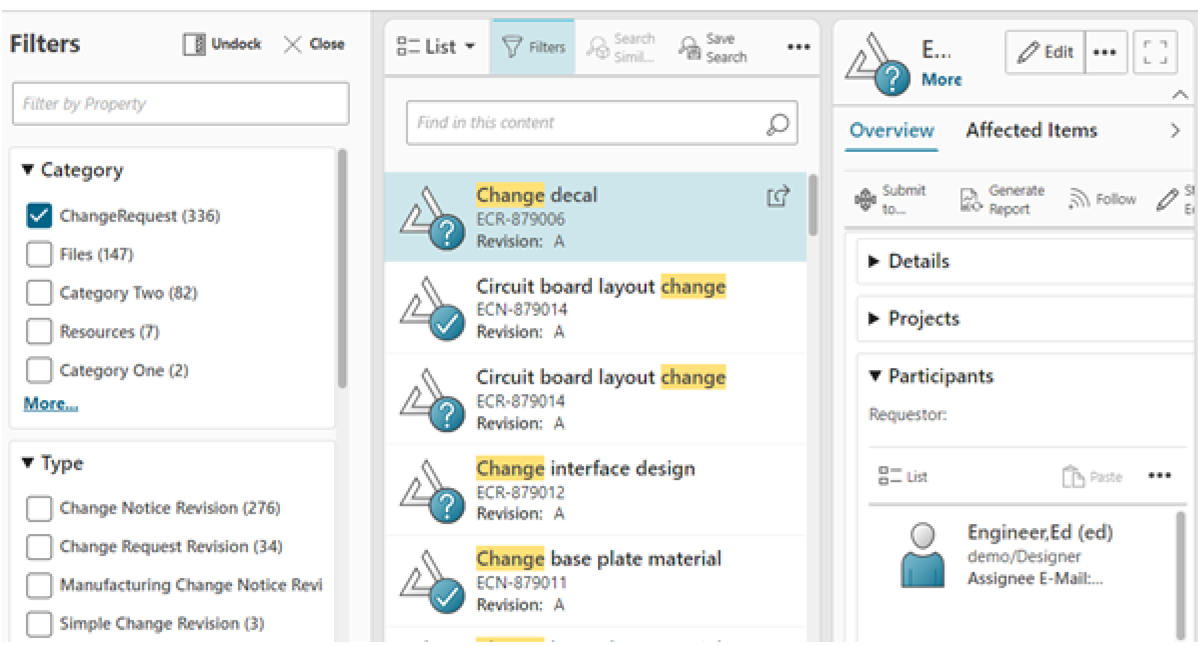
Summary reports are used to collate and summarize similar information, for example, reports that show entries for all the employees, the items belonging to a user, or the release status of items.

Procedure

1. Create a search.

a. Perform a search, for example, type *change* in the search box.

b. Select a filter, for example, **ChangeRequest** from the **Category** filter.



c. Select other filters as appropriate.

2. Create the report.

   a. Choose **More Commands** > **New** > **Create Report**.

   b. Select **Active summary report** and click **Create**.

3. Select a layout for the report and add charts.

   You must first create the report definition and add the data for the report before you can select a layout and add charts and a table.

   a. Specify a report title.

   b. Specify the number of charts you want to add for this report by selecting the appropriate option.

   c. Select **Bar Chart**, **Pie Chart**, or **Line Chart** for the type of chart you want to create.

   d. To create a layout for the report, click **Edit** above the chart.

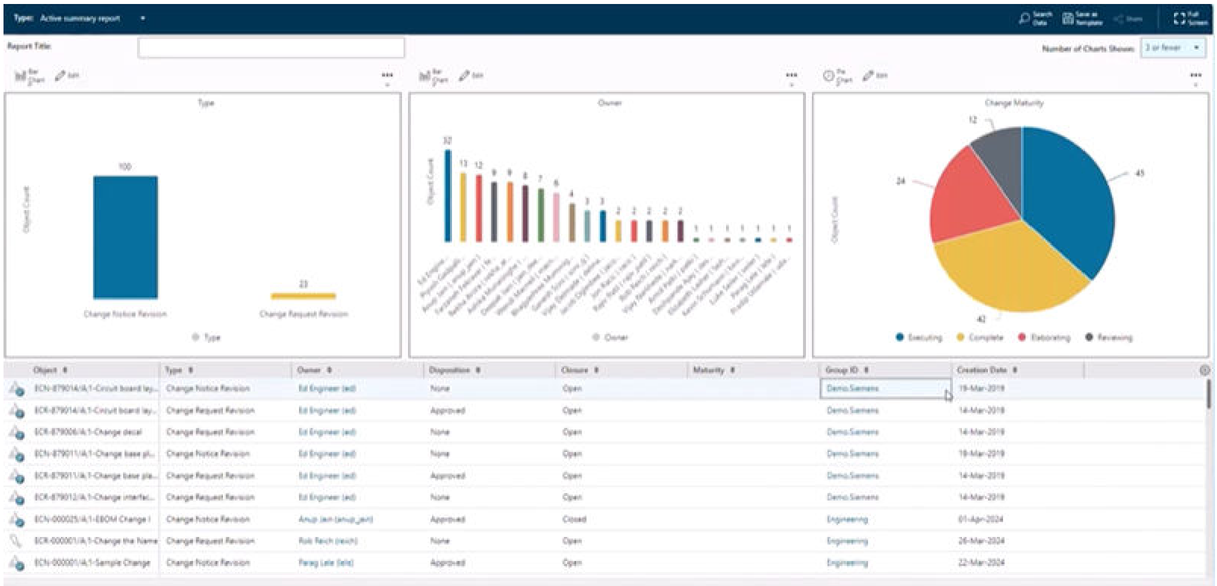
   e. To add a property for the chart, from the **Chart On** list, select a value, for example, **Type**.

   f. Specify a title for the chart type or accept the default title.

   g. To save this chart type, click **Save**.

   h. To add the second and third charts, repeat the above steps. You can choose other properties for the second and the third chart, for example, **Owner** and **Change Maturity**, respectively.

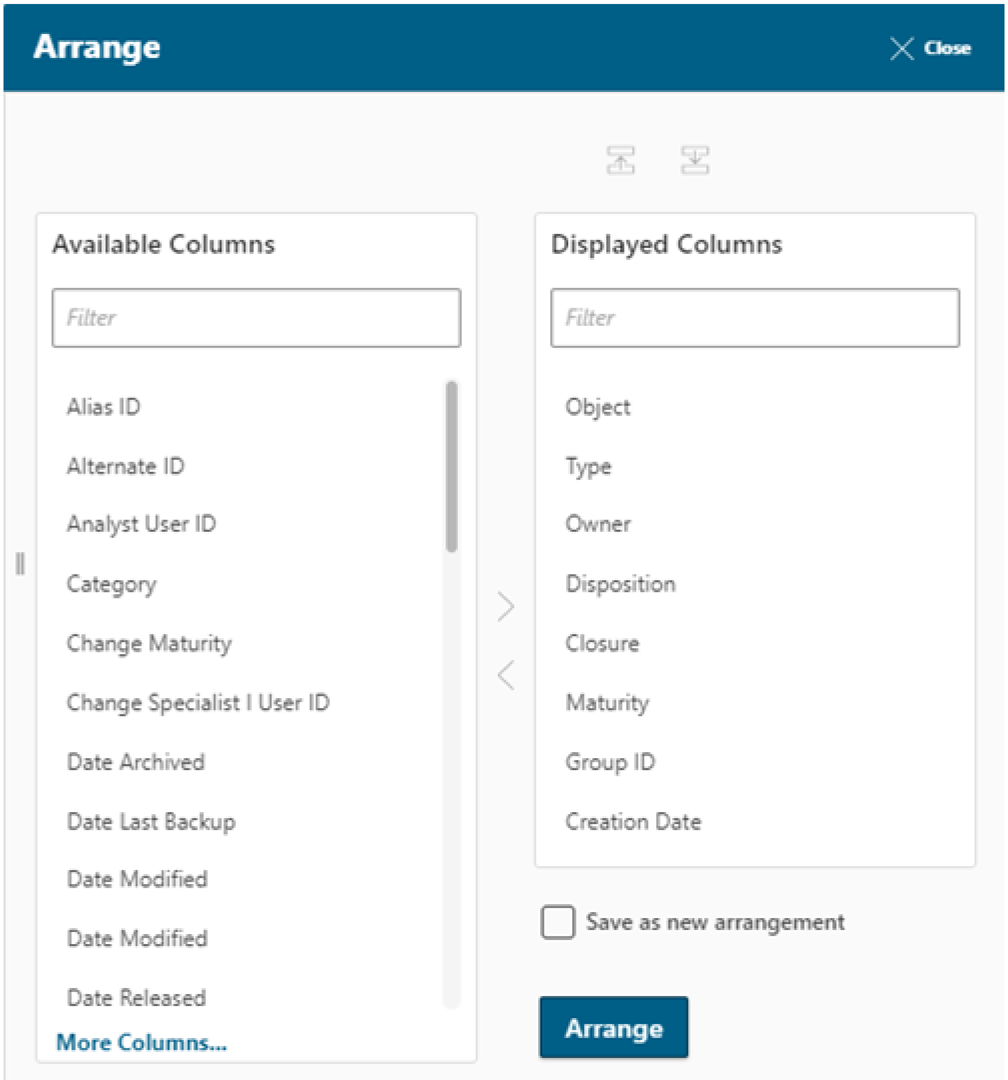
      You can add additional chart properties depending on how the administrator has configured your Teamcenter environment. Consult your administrator for more information.



4. To display the data in a tabular format, add a table for the report.

    a. In the **Table** area, click **Table Settings** > **Arrange**.

    b. From **Available Columns**, select column name properties such as **Object**, **Type**, **Owner**, **Disposition**, **Closure**, **Maturity**, **Group ID**, and **Creation Date** and click to move them to **Displayed Columns**.



c. (Optional) To rearrange the columns in the table, in the **Column Name** area, select a column name, click the column widget, and move the column up or down.

d. To save the column arrangement, click **Arrange**.

e. (Optional) You can add additional columns to the table depending on how the administrator has configured your Teamcenter environment. Consult your administrator for more information.

5. Save the report as a template.

   a. To save the report as a template, click **Save as Template** .

   b. (Mandatory) Specify a name for the report.

   c. (Optional) Include a description.

d. (Mandatory) Specify an ID for the report or accept the default ID for the report.

e. (Optional) Specify a Thumbnail for the report or accept the default value.

f. (Optional) To include the report in **My Dashboard**, select the **Add to Dashboard** check box.

g. Click **Save**.

6. Generate the report.

a. From the **Templates** page, select the report you want to generate.

b. To generate the report, click **Open** .

The report is generated by fetching the latest data from the database.

7. Export the table area of the report to Microsoft Excel.

a. To open the report from any dashboard, hover over the report title until a link appears, and click the title link to open it. Alternatively, select the report and click **More Commands** > **Open**.

From **Templates**, select the report and click **Open**.

b. Click **Export to Excel** above the table area of the report.

c. Click **Add Properties** and deselect the properties that you do not want to be displayed in the exported report.

d. To download the report, click **Export**.

e. Click **Downloads** in your browser to open the exported file.

Create and generate an active item report from various sublocations

You can create and generate an active item report by selecting an object from any sublocation other than **Reports**.

Procedure

1. From the **Home** page, click **Advanced Search**.

2. Select an appropriate option such as **Item Revision**, specify other parameters as appropriate,and click **Search**.

3. Create the report.

a. Select an object from the search results and click **More Commands** > **New** > **Create Report**; OR

b. On the **Home** page, you can choose **Explorer**, **Changes**, **Programs**, or **Schedules**, select an object, and click **More Commands** > **New** > **Create Report**.

4. To create the report, click **Create**.

5. Add relations for the report.

a. To add the relations, click **Add** and click **Pin Panel** to add multiple relations.

The system displays all the possible relations of the source object.

Column name	Description
Relation (Object)	Displays the relation name and the type of object this particular relation returns.
Relation Type	Displays the relation type such as primary, secondary, reference, or referenced by.
Count	Displays the number of objects that are related.

b. Select the appropriate relation object and click **Add**. Keep adding relations as appropriate.

6. Select a layout for the report and add charts

You must first create the report definition and add the data for the report before you can select a layout and add charts and a table.

a. Specify a report title.

b. Specify the number of charts you want to add for this report by selecting the appropriate option.

c. Select **Bar Chart**, **Pie Chart**, or **Line Chart** for the type of chart you want to create.

d. To create a layout for the report, click **Edit**.

e. To add a property for the chart, from the **Chart On** list, select a value, for example, **State**.

f. To add the second and third charts, repeat the above steps. You can choose other properties for the second and the third chart, for example, **Status** and **Work Complete Percent**, respectively.

You can add additional chart properties depending on how the administrator has configured your Teamcenter environment. Consult your administrator for more information.

g. Specify a title for the chart type or accept the default title.

h. To save this chart type, click **Save**.

i. After creating more than one chart, to move the chart, click **... More Commands** and select the appropriate option.

7. To display the data in a tabular format, add a table for the report.

a. In the **TABLE** area, click **Table Settings** > **Arrange**.

b. From **Available Columns**, select column name properties such as **State**, **Status**, **Object**, **Finish Date**, **Schedule**, and **Actual Start Date**, and click > to move them to **Displayed Columns**.

c. (Optional) To rearrange the columns in the table, in the **Column Name** area, select a column name, click the column widget, and move the column up or down.

d. To save the column arrangement, click **Arrange**.

8. Add filters to the relations you have added.

a. To add the relations, click **Add** and click **Pin Panel** to add multiple relations.

The system displays all the possible relations of the source object.

Column name	Description
Relation (Object)	Displays the relation name and the type of object this particular relation returns.
Relation Type	Displays the relation type such as primary, secondary, reference, or referenced by.
Count	Displays the number of objects that are related.

b. Select the appropriate relation object and click **Add**. Keep adding relations as appropriate.

9. Save the report as a template.

a. To save the report as a template, click **Save as Template**.

b. (Mandatory) Specify a name for the report.

c. (Optional) Include a description.

d. Click **Save**.

10. Edit the report from **Templates**.

    a. Navigate to the **Templates** location.

    b. Search for the report definition you want to edit, select it, and choose **More Commands** > **Edit** > **Edit Report**.

    c. Make the necessary changes and save the report.

11. Generate the report.

    a. Search for the object for which you want to generate the report.

    b. Select the object, and choose **More Commands** > **New** > **Generate Report**.

    c. Select the report you created and click **Generate**.

       The report is generated by fetching the latest data from the database.

12. Drill down the report to find specific data.

    a. To open the report from any dashboard, hover over the report title until a link appears, and click the title link to open it. Alternatively, select the report and click **More Commands** > **Open**.

       From **Templates**, select the report and click **Open**.

    b. Select a specific area of the chart, for example, **Complete** in the **State** or **Status** charts.

       The chart and the table area show objects specific to the selection.

    c. Click the **State Complete** button to close this view.

    d. Click the bar chart in the **Work Complete Percent** area.

       The chart and the table area show objects specific to the selection.

    e. Click the **Work Complete Percent** button to close this view.

13. Export the table area of the report to Microsoft Excel.

    a. To open the report from any dashboard, hover over the report title until a link appears, and click the title link to open it. Alternatively, select the report and click **More Commands** > **Open**.

       From **Templates**, select the report and click **Open**.

b. Click **Export to Excel** above the table area of the report.

c. Click **Add Properties** and deselect the properties that you do not want to be displayed in the exported report.

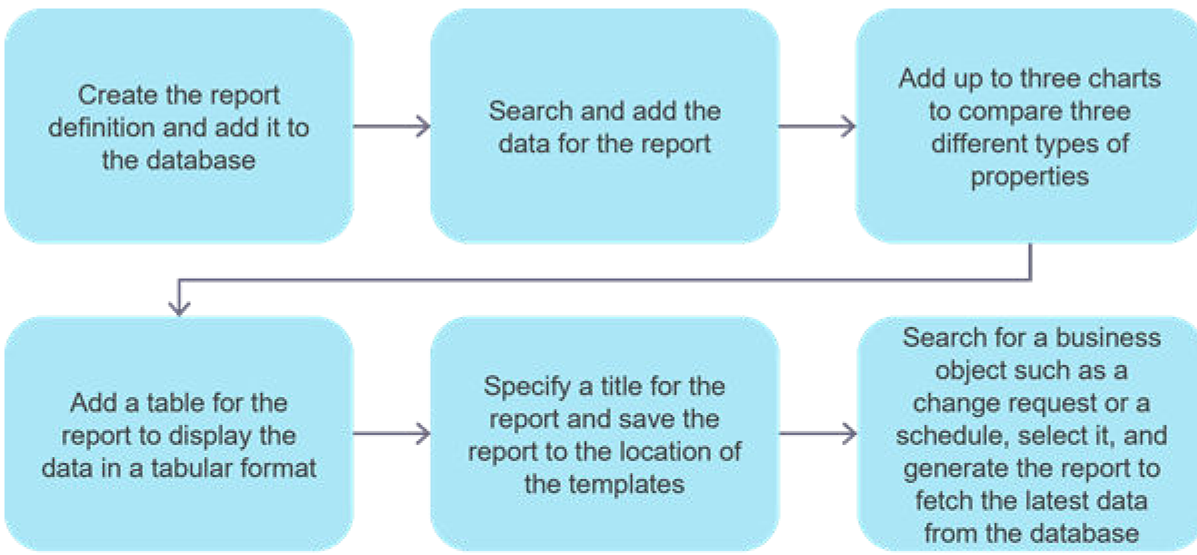
d. To download the report, click **Export**.

e. Click **Downloads** in your browser to open the exported file.

Create an active item report for a program

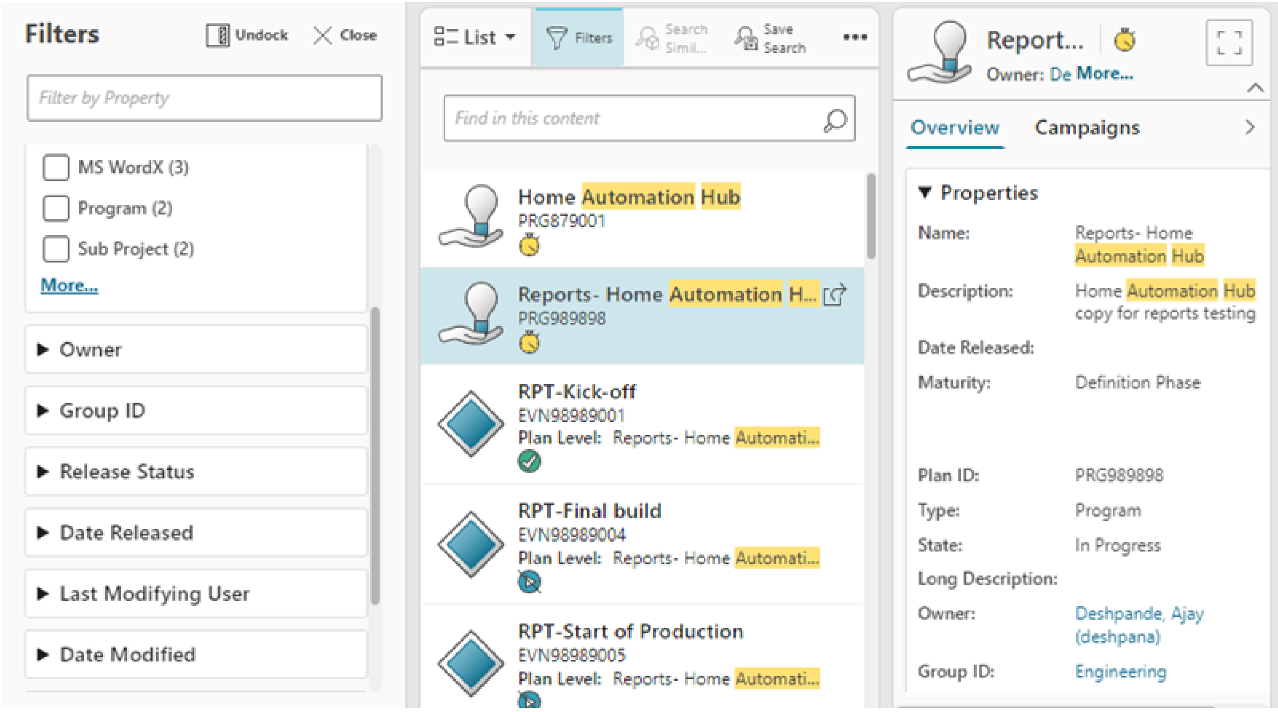
You can create an active item report for a program.

The process for creating and generating an active item report is as follows:



Procedure

1. Search for the program, select it, apply appropriate filters, click **More Commands** > **New** > **Create Report** and select **Active item report**.



Alternatively, create the report definition and add the data for the report by performing the following steps:

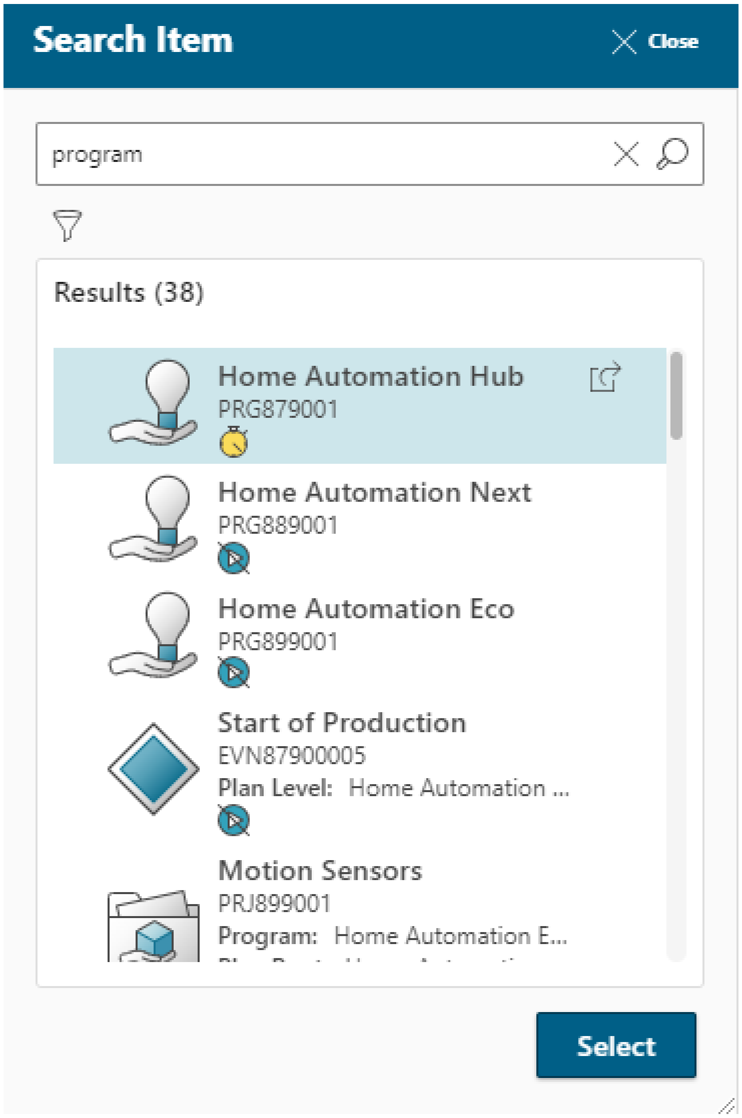
a. On the **HOME** page, click the **REPORTS** tile.

b. In **My Dashboard** or **Templates**, choose **More Commands** > **New** > **Create Report**.

c. To create an item report, from the **Type** menu, select **Active item report**.

d. Search for the data you want to include in the report in the **Search Item** panel, select it, and click **Select**.

Example:



2. Add relations for the report.

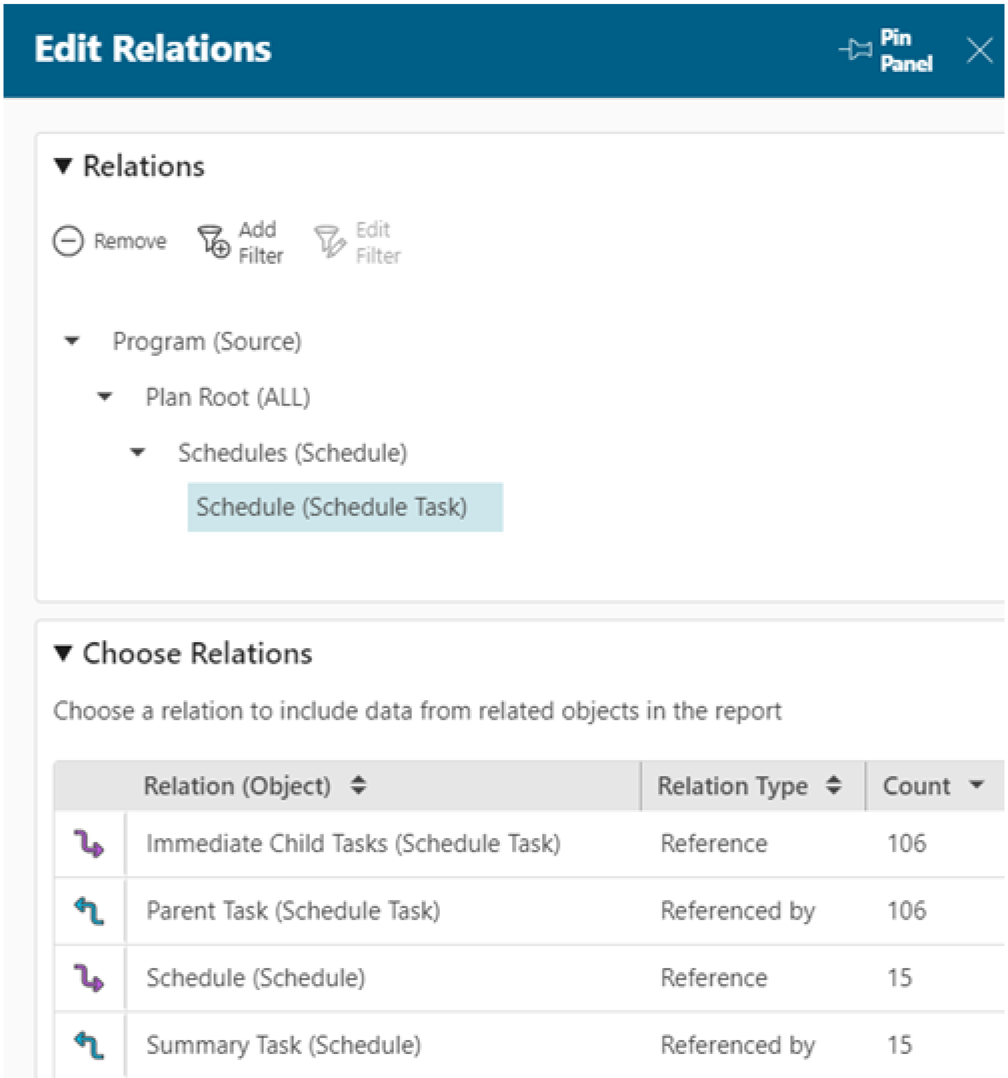
   a. To add the relations, click **Add** and click **Pin Panel** to add multiple relations.

      The system displays all the possible relations of the source object.

Column name	Description
Relation (Object)	Displays the relation name and the type of object this particular relation returns.
Relation Type	Displays the relation type such as primary, secondary, reference, or referenced by.
Count	Displays the number of objects that are related.

   b. Select the appropriate relation object and click **Add**. Keep adding relations as appropriate.

Example:



3. Select a layout for the report and add charts

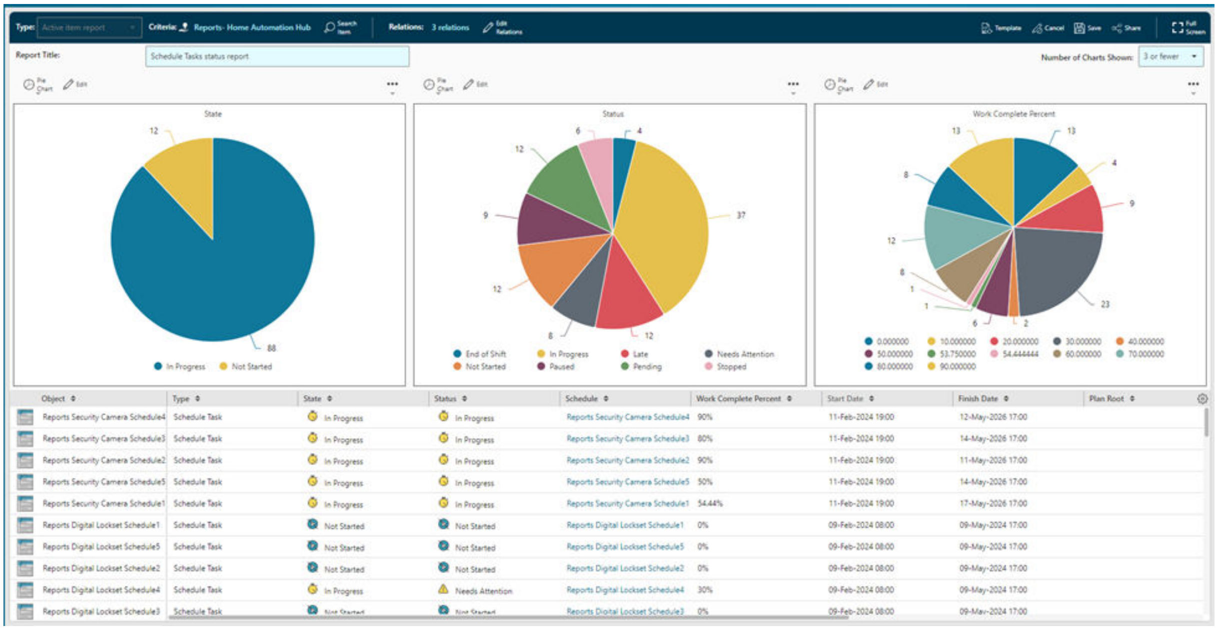
   You must first create the report definition and add the data for the report before you can select a layout and add charts and a table.

   a. Specify a report title.

   b. Specify the number of charts you want to add for this report by selecting the appropriate option.

   c. Select **Bar Chart**, **Pie Chart**, or **Line Chart** for the type of chart you want to create.

   d. To create a layout for the report, click **Edit**.



e. To add a property for the chart, from the **Chart On** list, select a value, for example, **State**.

f. To add the second and third charts, repeat the above steps. You can choose other properties for the second and the third chart, for example, **Status** and **Work Complete Percent**, respectively.

   You can add additional chart properties depending on how the administrator has configured your Teamcenter environment. Consult your administrator for more information.

g. Specify a title for the chart type or accept the default title.

h. To save this chart type, click **Save**.

i. After creating more than one chart, to move the chart, click **... More Commands** and select the appropriate option.

4. To display the data in a tabular format, add a table for the report.

   a. In the **TABLE** area, click **Table Settings** > **Arrange**.

   b. From **Available Columns**, select column name properties such as **State**, **Status**, **Object**, **Finish Date**, **Schedule**, and **Actual Start Date**, and click 〉 to move them to **Displayed Columns**.

   c. (Optional) To rearrange the columns in the table, in the **Column Name** area, select a column name, click the column widget, and move the column up or down.

   d. To save the column arrangement, click **Arrange**.

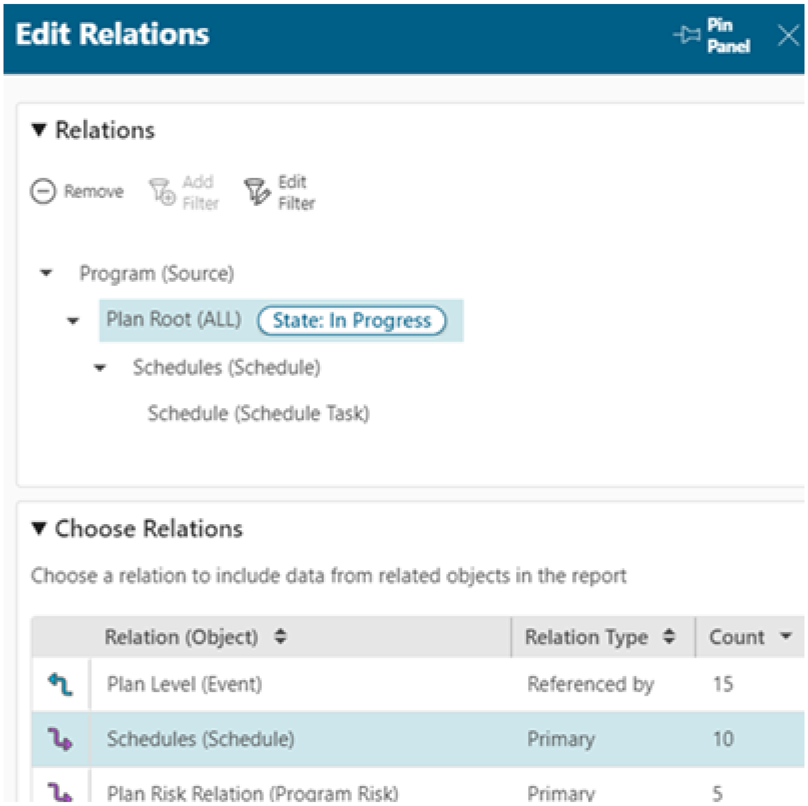
5. Add filters to the relations you have added. You can add filters, for example, to display only schedules that are in progress or display only tasks that are complete or not started.

   a. To display only schedules that are in progress in the report you are creating, select **Edit Relations** and click **Add Filter**.

      The system displays a warning message.

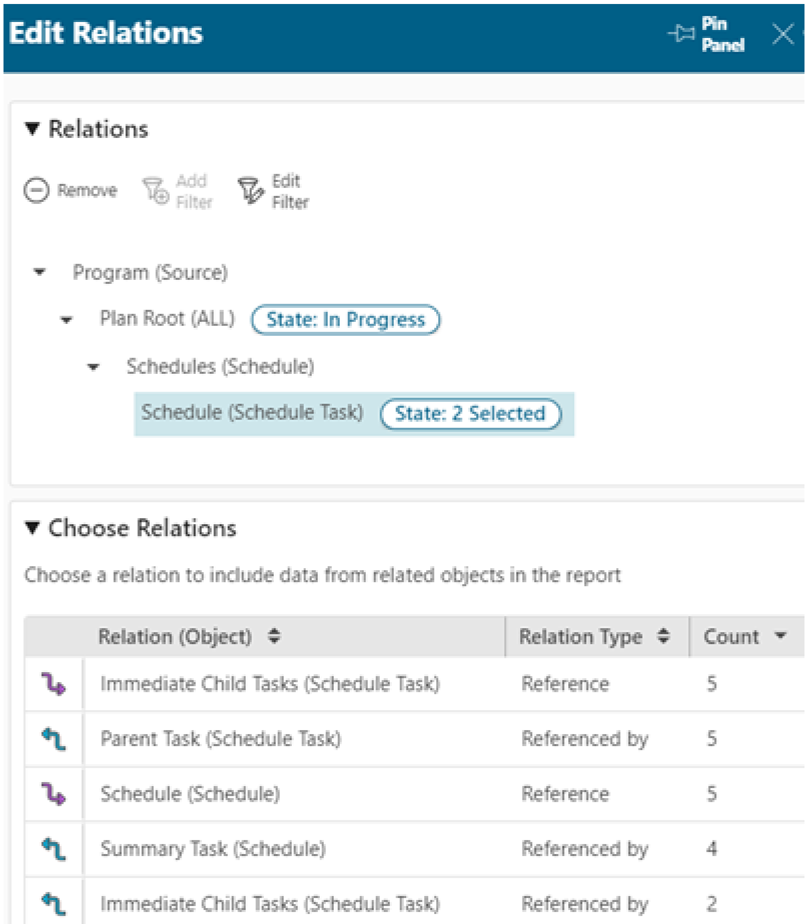
   b. Select **Keep** to retain dependent relations.

   c. Select **In Progress** from the **State** filter and click **Add Filter**.

   d. To display only tasks that are complete or not started in the report you are creating, repeat step a and step b.

   e. Select **Completed** and **Not Started** from the **State** filter and click **Add Filter**.



6. Save the report as a template.

   a. To save the report as a template, click **Save as Template**.

   b. (Mandatory) Specify a name for the report.

   c. (Optional) Include a description.

   d. Click **Save**.

7. Edit the report from **Templates**.

   a. Navigate to the **Templates** location.

   b. Search for the report definition you want to edit, select it, and choose **More Commands** > **Edit** > **Edit Report**.

   c. Make the necessary changes and save the report.

8. Generate the report.

a. Search for the object for which you want to generate the report.

b. Select the object, and choose **More Commands** > **New** > **Generate Report**.

c. Select the report you created and click **Generate**.

The report is generated by fetching the latest data from the database.

9. Drill down the report to find specific data.

a. To open the report from any dashboard, hover over the report title until a link appears, and click the title link to open it. Alternatively, select the report and click **More Commands** > **Open**.

From **Templates**, select the report and click **Open**.

b. Select a specific area of the chart, for example, **Complete** in the **State** or **Status** charts.

The chart and the table area show objects specific to the selection.

c. Click the **State Complete** button to close this view.

d. Click the bar chart in the **Work Complete Percent** area.

The chart and the table area show objects specific to the selection.

e. Click the **Work Complete Percent** button to close this view.

10. Export the table area of the report to Microsoft Excel.

a. To open the report from any dashboard, hover over the report title until a link appears, and click the title link to open it. Alternatively, select the report and click **More Commands** > **Open**.

From **Templates**, select the report and click **Open**.

b. Click **Export to Excel** above the table area of the report.

c. Click **Add Properties** and deselect the properties that you do not want to be displayed in the exported report.

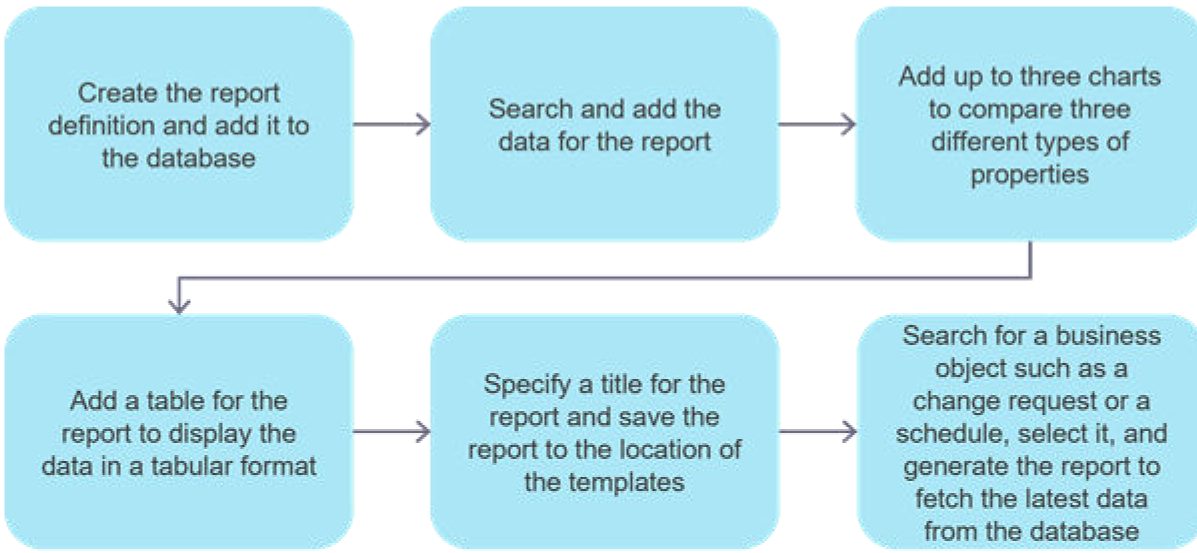
d. To download the report, click **Export**.

e. Click **Downloads** in your browser to open the exported file.

Create an active item report for scheduled tasks

You can create an active item report for scheduled tasks.

The process for creating and generating an active item report is as follows:



Procedure

1. (Optional) Create the sample data for scheduled tasks.

   The following procedures are optional. These tasks have a schedule object as the parent in this example. At your site, you can search for the appropriate object to add as the sample source to validate the related data.

   a. On the **HOME** page, click the **Schedules** tile.

   b. Choose **More Commands** > **New** > **Create Schedule** > **Schedule** and specify the name as **Test_Schedule**.

   c. Specify information as appropriate and click **Create**.

   d. Open the schedule you created, click the **Tasks** tab, click **Add Schedule Task** and select **Schedule Task**.

   e. Specify the name, add other information as appropriate, and click **Add**.

2. Create the report definition and add the data for the report.

   a. On the **HOME** page, click the **REPORTS** tile.

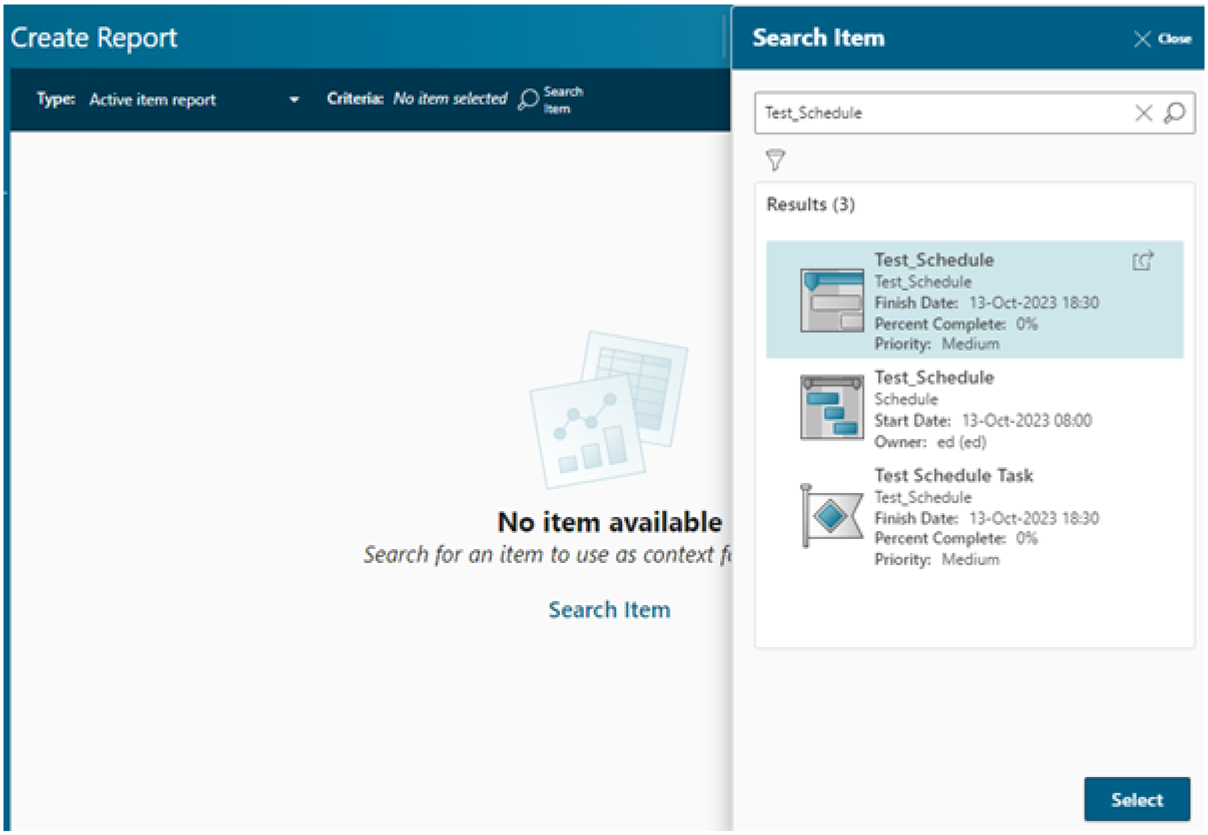
b. In **My Dashboard** or **Templates**, choose **More Commands** > **New** > **Create Report**.

c. To create an item report, from the **Type** menu, select **Active item report**.

3. Search for the data you want to include in the report.

a. To search for the item you want to include in the report, type, search for a schedule in the **Search Item** panel, select it, and click **Select**.

In this example, you can search for **Test_Schedule** as per the sample data you created.

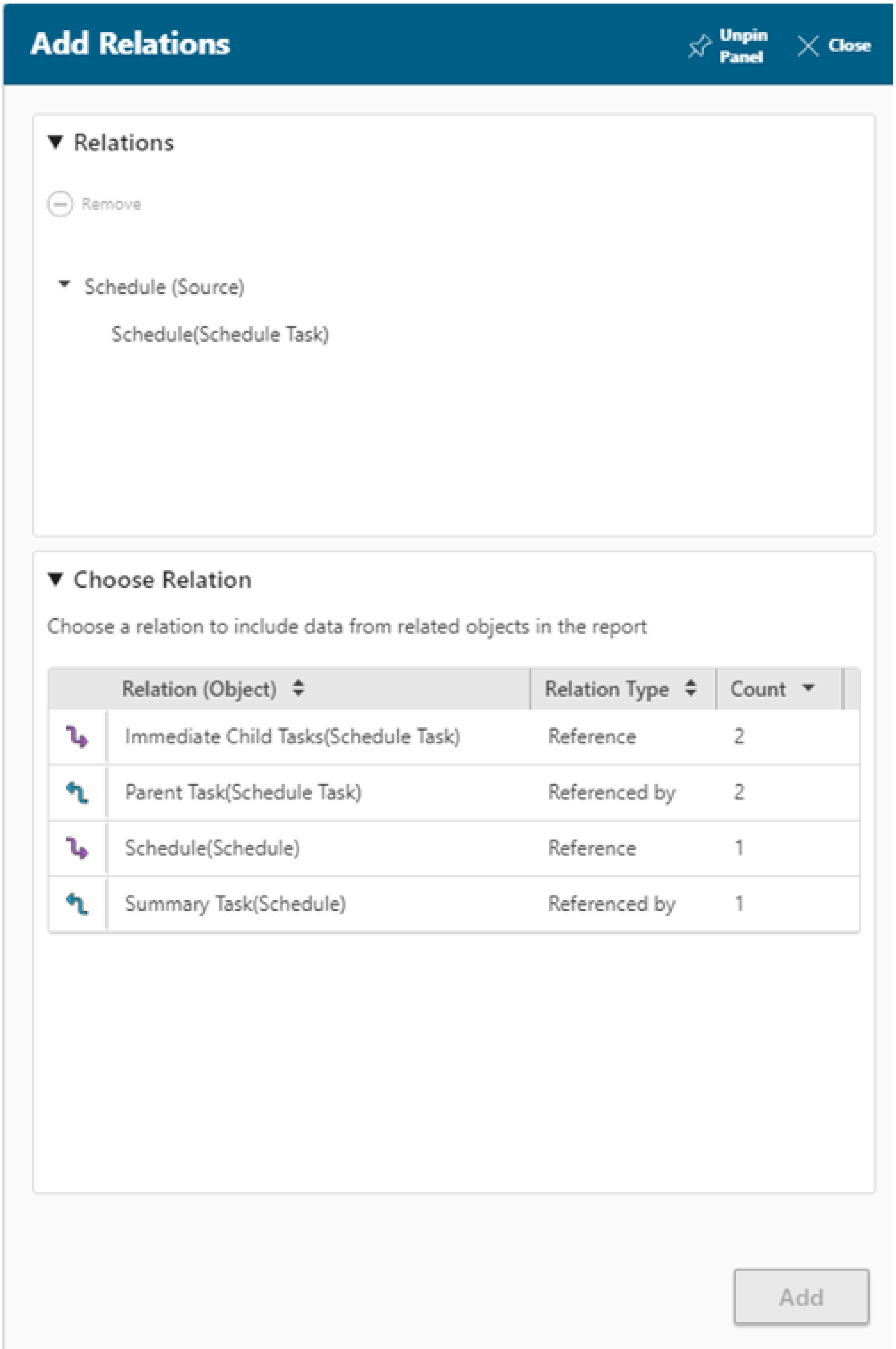


b. To add the relations, click **Add** and click **Pin Panel** to add multiple relations.

The system displays all the possible relations of the source object.

Column name	Description
Relation (Object)	Displays the relation name and the type of object this particular relation returns.
Relation Type	Displays the relation type such as primary, secondary, reference, or referenced by.
Count	Displays the number of objects that are related.

c. Select the appropriate relation object and click **Add**. Keep adding relations as appropriate.



4. Select a layout for the report and add charts

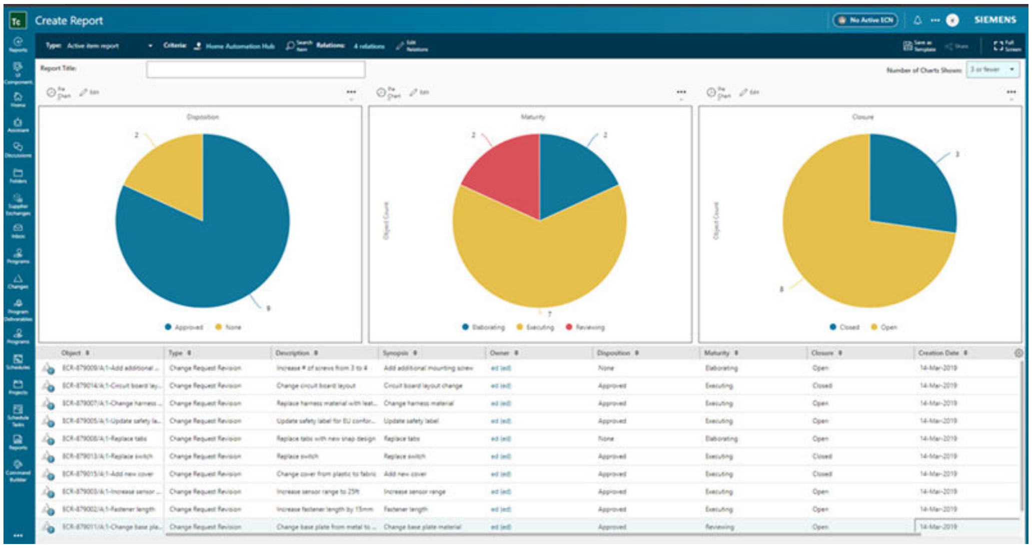
You must first create the report definition and add the data for the report before you can select a layout and add charts and a table.

a. Specify a report title.

b. Specify the number of charts you want to add for this report by selecting the appropriate option.

c. Select **Bar Chart**, **Pie Chart**, or **Line Chart** for the type of chart you want to create.

d. To create a layout for the report, click **Edit**.



e. To add a property for the chart, from the **Chart On** list, select a value, for example, **Status**.

f. Specify a title for the chart type or accept the default title.

g. To save this chart type, click **Save**.

h. To add the second and third charts, repeat the above steps. You can choose other properties for the second and the third chart, for example, **State** and **Priority**, respectively.

You can add additional chart properties depending on how the administrator has configured your Teamcenter environment. Consult your administrator for more information.

i. After creating more than one chart, to move the chart, click **... More Commands** and select the appropriate option.

5. To display the data in a tabular format, add a table for the report.

a. In the **TABLE** area, click **Table Settings** > **Arrange**.

   b. From **Available Columns**, select column name properties such as **Object**, **Task Type**, **Description**, **State**, and **Status**, and click > to move them to **Displayed Columns**.

   c. (Optional) To rearrange the columns in the table, in the **Column Name** area, select a column name, click the column widget, and move the column up or down.

   d. To save the column arrangement, click **Arrange**.

6. Save the report as a template.

   a. To save the report as a template, click **Save as Template**.

   b. (Mandatory) Specify a name for the report.

   c. (Optional) Include a description.

   d. Click **Save**.

7. Edit the report from **Templates**.

   a. Navigate to the **Templates** location.

   b. Search for the report definition you want to edit, select it, and choose **More Commands** > **Edit** > **Edit Report**.

   c. Make the necessary changes and save the report.

8. Generate the report.

   a. Search for the object for which you want to generate the report.

   b. Select the object, and choose **More Commands** > **New** > **Generate Report**.

   c. Select the report you created and click **Generate**.

      The report is generated by fetching the latest data from the database.

   d. (Optional) Create another schedule task.

      A. Open the schedule you created, click the **Tasks** tab, click **Add Schedule Task**, and select **Schedule Task**.

      B. Specify a name, add other information as appropriate, and click **Add**.

      C. (Optional) Run the report again to see the new scheduled task.

9. Export the table area of the report to Microsoft Excel.

   a. To open the report from any dashboard, hover over the report title until a link appears, and click the title link to open it. Alternatively, select the report and click **More Commands** > **Open**.

      From **Templates**, select the report and click **Open**.

   b. Click **Export to Excel** above the table area of the report.

   c. Click **Add Properties** and deselect the properties that you do not want to be displayed in the exported report.

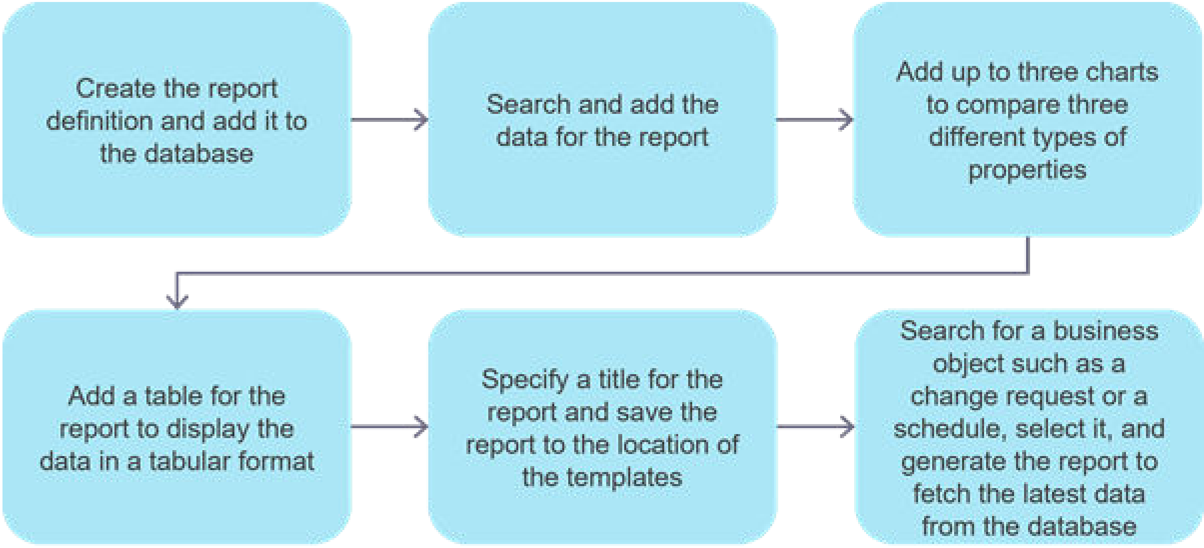
   d. To download the report, click **Export**.

   e. Click **Downloads** in your browser to open the exported file.

Create an active item report for change requests

You can create an active item report for change requests.

The process for creating and generating an active item report is as follows:



Procedure

1. (Optional) Create the sample data for the change request.

   The following procedures are optional. These change requests have part revisions as a problem item in this example. At your site, you can search for the appropriate object to add as the sample source to validate the related data.

   a. Select **Explorer** and choose **More Commands** > **New** > **Add** > **Part** and specify the name as **Test_Part**.

   b. In **Explorer**, select the part you created and choose **More Commands** > **New** > **Create Change** > **Change Request**, fill the required boxes, and click **Create and Submit**.

   c. Open the change request and choose the **Affected Items** tab. It displays the **Test_Part** part revision. In this example, while creating the report, a backward traversal rule is being created from the part revision to the change request.

   d. Open the part revision and choose the **Changes** tab. This part has a relation type of **Problems** with the change request you created.

2. Create the report definition and add the data for the report.

   a. On the **HOME** page, click the **REPORTS** tile.

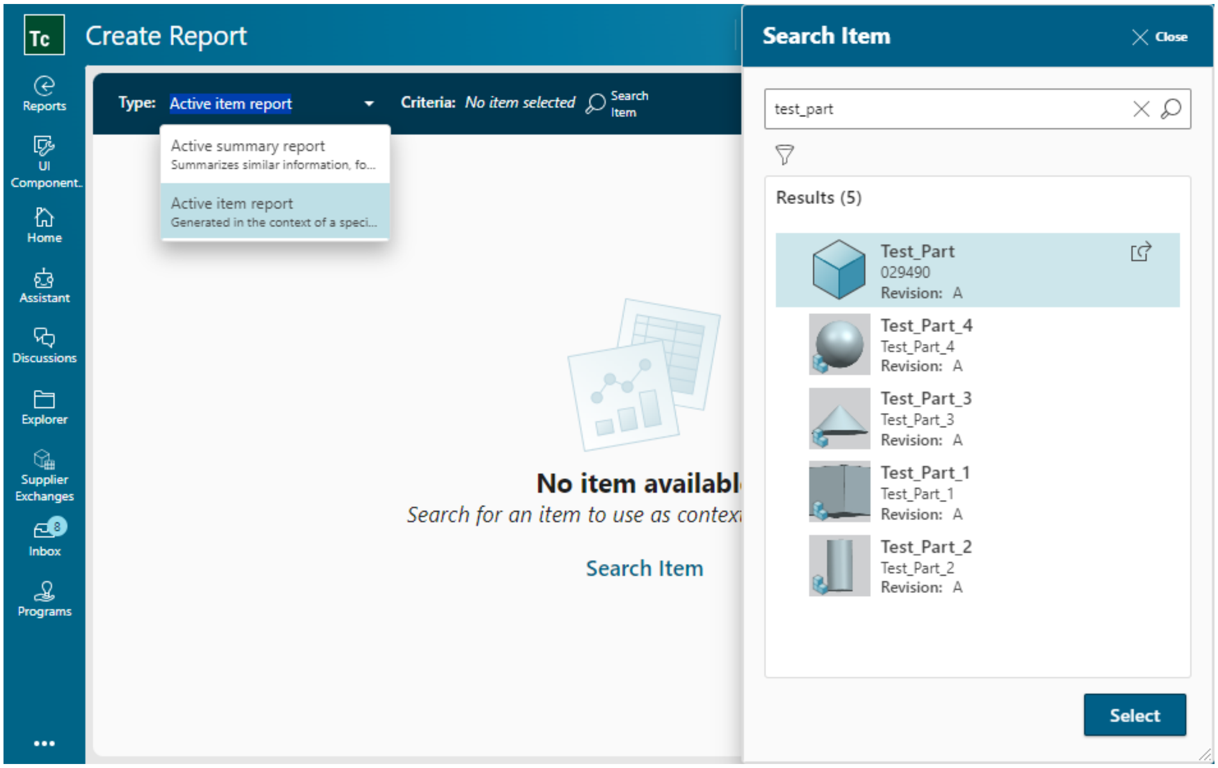
   b. In **My Dashboard** or **Templates**, choose **More Commands** > **New** > **Create Report**.

   c. To create an item report, from the **Type** list, select **Active item report**.

3. Search for the data you want to include in the report.

   a. To search for the item you want to include in the report, click **Search Item**.

      For example, type **Test_Part** to search for a part in the **Search Item** panel, select it, and click **Select**.

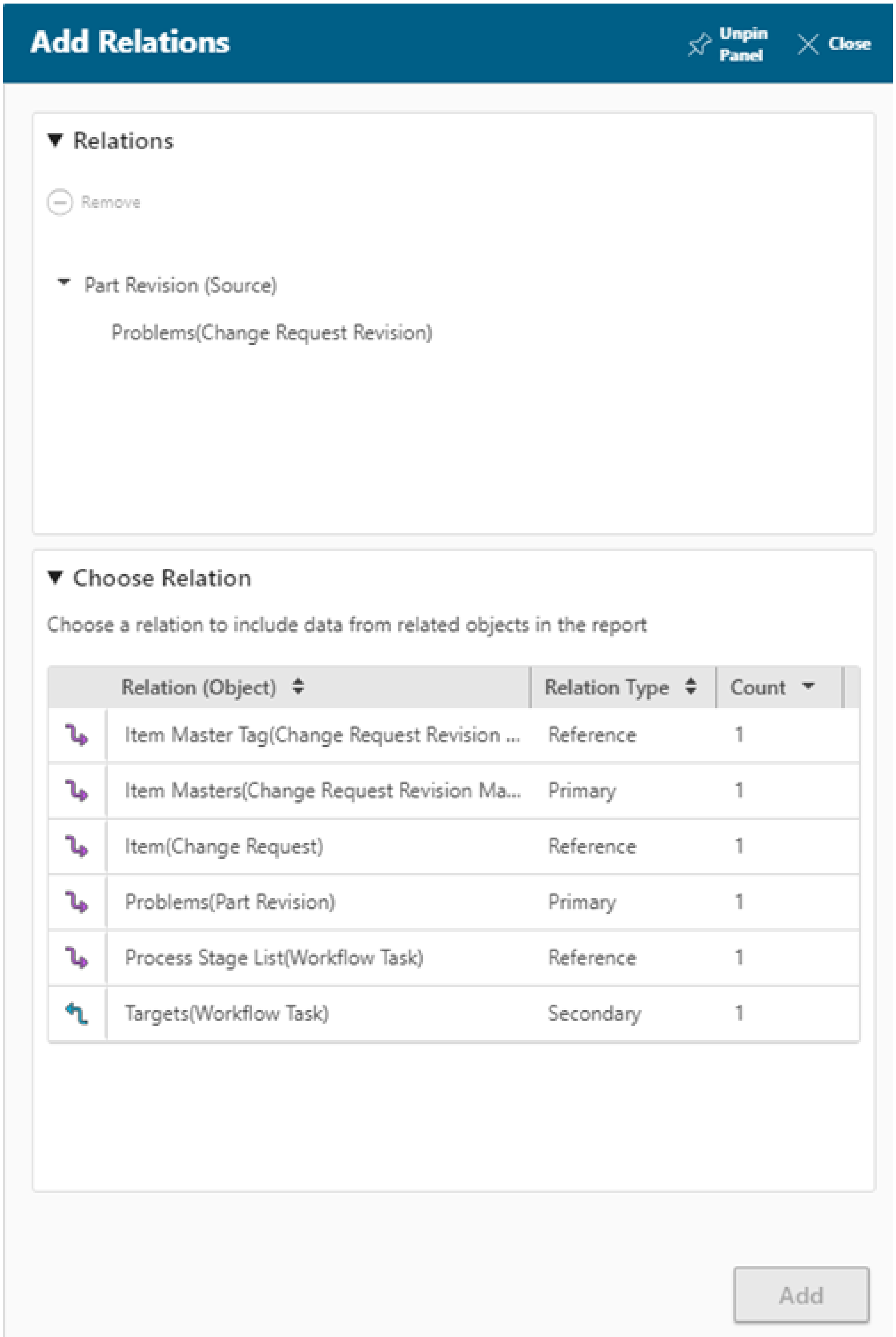


b. To add the relations, click **Add Relations** and click **Pin Panel** to add multiple relations.

The system displays all the possible relations of the source object.

Column name	Description
Relation (Object)	Displays the relation name and the type of object this particular relation returns.
Relation Type	Displays the relation type such as primary, secondary, reference, or referenced by.
Count	Displays the number of objects that are related.

c. Select the appropriate relation object and click **Add**. Keep adding relations as appropriate.



4. Select a layout for the report and add charts.

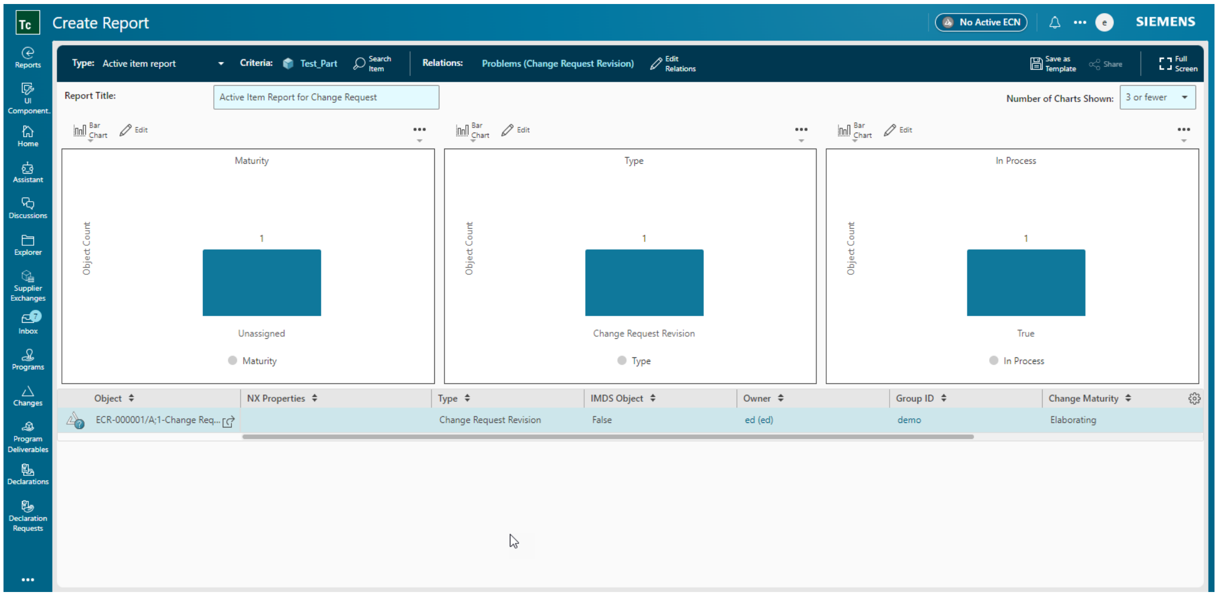
   You must first create the report definition and add the data for the report before you can select a layout and add charts and a table.

a. Specify a report title.

b. Specify the number of charts you want to add for this report by selecting the appropriate option.

c. Select **Bar Chart**, **Pie Chart**, or **Line Chart** for the type of chart you want to create.

d. To create a layout for the report, click **Edit**.



e. To add a property for the chart, from the **Chart On** list, select a value, for example, **Status**.

f. Specify a title for the chart type or accept the default title.

g. To save this chart type, click **Save**.

h. To add the second and third charts, repeat the above steps. You can choose other properties for the second and the third chart, for example, **State** and **Priority**, respectively.

You can add additional chart properties depending on how the administrator has configured your Teamcenter environment. Consult your administrator for more information.

i. After creating more than one chart, to move the chart, click **... More Commands** and select the appropriate option.

5. To display the data in a tabular format, add a table for the report.

a. In the **TABLE** area, click **Table Settings** > **Arrange**.

b. From **Available Columns**, select column name properties such as **Maturity**, **Disposition**, **Closure**, and **Creation Date**, and click > to move them to **Displayed Columns**.

c. (Optional) To rearrange the columns in the table, in the **Column Name** area, select a column name, click the column widget, and move the column up or down.

d. To save the column arrangement, click **Arrange**.

> Note:
>
> (Optional) You can add additional columns to the table depending on how the administrator has configured your Teamcenter environment. Consult your administrator for more information.

6. Save the report as a template.

    a. To save the report as a template, click **Save as Template**.

    b. (Mandatory) Specify a name for the report.

    c. (Optional) Include a description.

    d. Click **Save**.

7. Edit the report from **Templates**.

    a. Navigate to the **Templates** location.

    b. Search for the report definition you want to edit, select it, and choose **More Commands** > **Edit** > **Edit Report**.

    c. Make the necessary changes and save the report.

8. Generate the report.

    a. Search for the object for which you want to generate the report.

    b. Select the object, and choose **More Commands** > **New** > **Generate Report**.

    c. Select the report you created and click **Generate**.

    The report is generated by fetching the latest data from the database.

    d. (Optional) Create another schedule task.

A. Open the schedule you created, click the **Tasks** tab, click **Add Schedule Task** ⊕, and select **Schedule Task**.

B. Specify a name, add other information as appropriate, and click **Add**.

C. (Optional) Run the report again to see the new scheduled task.

9. Export the table area of the report to Microsoft Excel.

   a. To open the report from any dashboard, hover over the report title until a link appears, and click the title link to open it. Alternatively, select the report and click **More Commands** > **Open**.

      From **Templates**, select the report and click **Open**.

   b. Click **Export to Excel** above the table area of the report.

   c. Click **Add Properties** and deselect the properties that you do not want to be displayed in the exported report.

   d. To download the report, click **Export**.

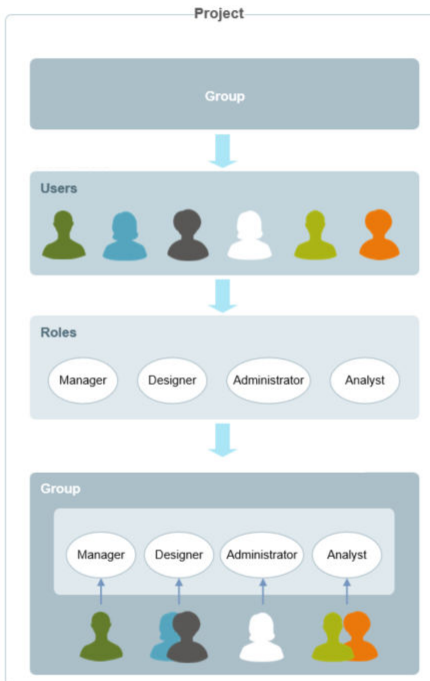
   e. Click **Downloads** in your browser to open the exported file.

Using Projects

What are projects and programs?

Companies have *programs* that usually include cross-functional teams. These programs can have a collection of related *projects* under them, each of which focuses on a specific tangible output.

A typical project comprises a group of users each having one or more roles.



Using **Projects** allows you to organize your data and control access to collections of related data, which may be accessible to multiple organizations. These organizations can include project teams, development teams, suppliers, and customers.

Why do I want to use Projects?

You can view and manage your projects in either the **Projects** or the **Explorer** location. Use the **PROJECTS** tile or the **EXPLORER** tile to access these locations.

If you are a privileged team member, you can manage your projects and programs by assigning or removing objects from them. If you are a project or team administrator, you can manage your team members. As a project administrator, you can also modify the properties of your project or program.

You must use the rich client to delete projects and programs. You must also use the rich client to create and manage single-level hierarchical projects.

What privileges do project administrators and team members have?

The following table describes the privileges of the administrators and team members for any project.

	Add, remove, or assign status to members, including team administrator	Assign or remove objects from projects and programs	View objects
Project Administrator	Yes	Yes	Yes
Team Administrator[1]	Yes	Yes	Yes
Privileged team member		Yes	Yes
Non-privileged team member			Yes

Browsing projects and project data

You can view the projects of which you are a member and browse categorized lists of the data in those projects.

You can view project information in both the **Projects** and **Explorer** locations using the respective tiles to access each location.

Viewing project information in Projects

In the **Projects** location, you can view the projects of which you are a member in a list or table view.

Overview displays the details of the **Properties** and **Team Members** for the project.

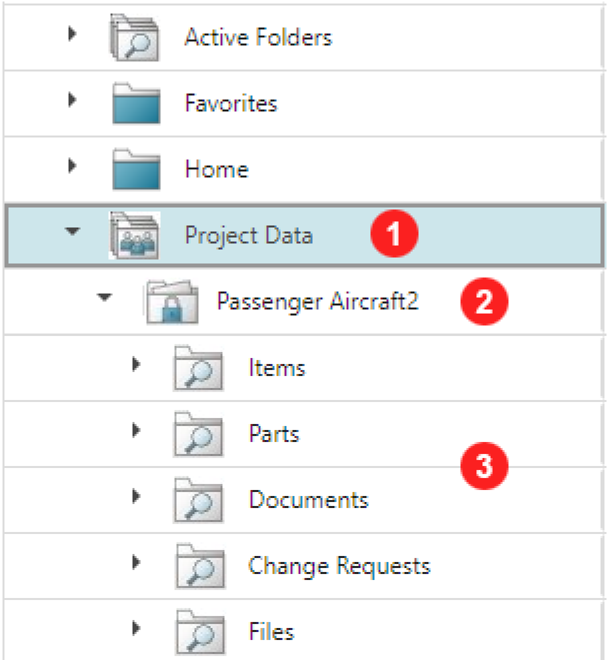
Open a project to view the project data contents.

Viewing project information in Explorer

In the **Explorer** location, expand the **Project Data** folder to view the projects of which you are a member.

The view displays a folder for each of your projects. You can expand these folders to browse different types of data objects in those projects.

1 Each project or program can have multiple team administrators. Having multiple team administrators allows you to balance resource management tasks for large projects.



A list of folders representing projects of which you are a member (2) appears under the **Project Data** folder (1). Each project folder expands to show folders for object types (3). You can expand each object type folder to see the objects of that type in the selected project. The default object types are **Items**, **Parts**, **Documents**, **Change requests**, and **Files**. Project data that is assigned to the project but does not apply to the available object type folders can be displayed in two ways:

- By default, in a **More project data** folder in the project folder.
- As a list in the project folder. To organize the project data as a list in the project folder, access the Search Settings panel and clear **Show the more project data folder**.

> Note:
>
> An administrator can customize the folder content, so what you see when you expand it might differ from the default. Be aware that the **Project Data** folder appears in the tree even if your organization does not use projects.

Create a project or program

You can create a new project or a program in **Projects** or **Explorer**. In **Projects**, you can also leverage an existing project or program to create another. If configured by your administrator, all users can create projects and programs.

Add a new project or program

1. Complete one of the following according to the location in which you are creating the project:

- In **Projects**, verify you do not have a project selected and click **Add Project** ⊕.
- In **Explorer**, select the **Project Data** folder and click **Create Project** ⊕.

  To create multiple projects or programs, click **Pin Panel** on the **Add Project** panel.

2. Enter the ID and name of the new project or program.

   Project and program names must be unique within your site. Also, they cannot be the same as any group within your site.

3. (Optional) Add a description.

4. (Optional) Select a project category from the drop-down list: **Internal**, **Partner**, or **Supplier**.

   Project categories allow you to control access to objects in a project without using access control rules.

5. Select either **Project** (default) or **Program**.

6. Click **Add**.

   Your newly created project or program:

   - Appears at the top of the projects list in **Projects**.
   - Appears in alphabetical order in the **Project Data** folder in **Explorer**.
   - Is set to **Active** and **Visible**, as shown in **Properties**.
   - Shows you as both the **Project Administrator** and **Team Administrator**, as shown in **Team Members**.

Leverage your existing project or program

1. From the **Projects** location, select an existing project or program for which you are a **Project Administrator** or have **DBA** privileges.

2. Click **Save As**.

   To create multiple projects or programs, click **Pin Panel** on the **Save As New Project** panel.

3. Edit the ID and name of the new project or program to make them unique.

   Project and program names must be unique within your site. Also, they cannot be the same as any group within your site.

4. (Optional) Modify the description.

5. (Optional) Modify the project category by selecting a project category from the drop-down list: **Internal**, **Partner**, or **Supplier**.

   Project categories allow you to control access to objects in a project without using access control rules.

6. (Optional) Select **Include project data and libraries** to include project data and libraries.

7. Click **Save**.

   Your newly created project or program appears at the top of the **Projects** list and is highlighted. By default, the newly created project or program is set to **Active** and **Visible**, as shown in the **PROPERTIES** section.

   By default, the project or program team, along with the accompanying metadata, is copied to the newly created project or program.

   If you selected **Include project data and libraries**, you can open your newly created project and select the **Contents** tab to verify the project data and libraries were successfully included.

Modify projects and programs

Edit project and program properties

You can modify project or program properties to accommodate changes to the project.

- In **Projects**, in the **Overview** tab for the project, click **Edit** .

- In **Explorer**, in the **Advanced** tab for the project, click **Edit** .

In the **Properties** section, you can modify your project and program properties when you may want to:

- Change project category. For example, you could change the project category from **Internal** to **Supplier**.

- Remove **Active** status if your project or program is no longer active.

- Remove **Visible** status if your project or program is no longer active.

Add objects or assemblies to a project

As your project progresses, you may need to add objects or assemblies. Project-level security is assigned to an object or assembly when you add it to a project.

You can add objects to a project in which you are a privileged member in the following ways:

- **Assign a project to an object or assembly.**
- **Add an object to a project.**
- **Upload a file to a project.**
- **Drag and drop an object into a project.**

Assign a project to an object or assembly

1. Select one or more parts, documents, or other objects.

2. Click **More commands** ••• > **Manage** > **Projects**.

   The **Projects** panel is displayed with **Member of** and **Owning** tabs.

3. You can add projects to the object in the following ways:

   - In the **Owning** tab, select a project from the **Available** list and click **Add Project** ⊕ to move the project to both the **Member of** and **Owning** project lists.

   - In the **Member of** tab, select a project from the **Available** list and click **Add Project** ⊕ to move the project to the **Member of** project list.

4. Associate the objects with **This Revision** or **All Revisions**.

   If **All Revisions** is selected, the project is assigned to the object and all revisions.

5. If the object is an assembly, select either **Entire Structure** to add the structure or **Level** to add the item.

6. If the object is a folder, you can select whether to assign the project to **Folders Only** or to **Folders and Content**.

7. Click **Save**.

Add an object to a project

1. In **Explorer,** expand the **Project Data** folder.

2. Select the project folder to which you want to add an object.

3. Click **Add** ⊕.

4. In the **Add** panel, select the object you want to add in one of the following ways:

   - Use **New** to create a new object for the project. Select the **Type** and enter the applicable **Properties**.
   - Use **Palette** to select an existing object that was recently accessed or saved.
   - Use **Search** to find an existing object.

5. Click **Add**.

The object is added to the project. Depending on the configuration set by your administrator for the project data folders, a few minutes may pass until the object is categorized into the applicable folder in the project folder.

Upload a file to a project

1. In **Explorer,** expand the **Project Data** folder.
2. Select the project folder to which you want to add an object.
3. Click **Upload**.
4. Select the file you want to upload.
5. Click **Add**.

The uploaded file is added to the applicable object type folder in the project folder.

Drag and drop an object into a project

1. In **Explorer,** expand the **Project Data** folder.
2. Expand the folder that contains the object you want to add to a project.
3. Click on the object you want to add and drag it to the applicable project folder.

The object is added to the applicable object type folder in the project folder.

Add folders to a project

As your project progresses, you may want to add folders to your project. Project-level security is assigned to a folder when you add it to a project.

You can add just a folder or a folder and its contents to a project in which you are a privileged member using one of the following methods:

- Copy and paste a folder into a project.
- Drag and drop a folder into a project.
- Assign a project to a folder.

Copy and paste a folder into a project

1. In **Explorer**, select one or more folders you want to add to a project.
2. Right-click and select **Copy**.
3. In the **Project Data** folder, select the project to which you want to add the folder.
4. Right-click and select **Paste**.
5. When the message is displayed:
   - Select **Folder Only** to add only the folder to the project.
   - Select **Folder and Content** to add the folder and all its contents to the project.

Drag and drop a folder into a project

1. In **Explorer,** expand the **Project Data** folder.
2. Select one or more folders you want to add and drag it to the applicable project folder.
3. When the message is displayed:
   - Select **Folder Only** to add only the folder to the project.
   - Select **Folder and Content** to add the folder and all its contents to the project.

Assign a project to a folder

When a folder is assigned to a project, you can add the folder content to the project. This is useful if the folder was previously assigned to the project without content or if additional content has been added to the folder outside the project.

1. In **Explorer**, select one or more folders currently assigned to a project in which you want to add the folder content the project.
2. Right-click and select **Assign project to folder content**.

3. Select the project to which the folder and its contents should be added.

4. Click **Save**.

Remove objects from a project

As your project progresses, you may need to remove objects or assemblies. Project-level security is removed from an object or assembly when you remove it from a project.

Unassign a project from an object or assembly

1. Select one or more parts, documents, or other objects.

2. Click **More commands** ••• > **Manage** > **Projects** .

   The **Projects** panel is displayed with **Member of** and **Owning** tabs.

3. You can remove the selected objects from a project.

   - In the **Owning** tab, select a project from the **Available** list and click **Replace** to replace the owning project.

   - In the **Member of** tab, select a project and click **Remove Project** ⊖ to move the project to the **Available** project list.

4. Associate the objects with **This Revision** or **All Revisions**.

5. Click **Save**.

Remove an object from a project

1. In **Explorer,** expand the **Project Data** folder.

2. Expand the project folder from which you want to remove an object.

3. Select the object type folder from which you want to remove an object.

4. In **Contents**, select the object you want to remove.

5. Click **Remove** ⊖.

6. If the object is a folder, do the following when the message is displayed:

   - Select **Folder Only** to remove only the folder from the project.

- Select **Folder and Content** to remove the folder and all its contents from the project.

Manage project team members

You can manage your project team members to streamline collaboration, ensure everyone has access to the latest project information, and maintain clear communication.

As the creator of the project or program, you are automatically assigned both **Project Administrator** and **Team Administrator** status. You can add, remove, or assign a status to users, roles, or groups.

- In **Projects**, select a project to view and manage your **Team Members**.
- In **Explorer**, select a project folder and navigate to **Members** to view and manage your **Team Members**.

You can perform search, sort, and **facet filtering** on each of the columns (**Name**, **Type**, and **Status**) to locate specific team members.

Add a user, role, or group to your project

1. In **Team Members**, click **Add** ⊕.
2. Search and filter to find the groups, roles, or users you want to add to the project.
3. In **Results**, select the groups, roles, and users you want to add to the project.
4. Click **Add**.

Add a user, role, or group to multiple projects

1. In **Projects**, click **Selection Mode** to enable multiple selections.
2. Select the projects to which you want to add team members.
3. Click **Add Team Members** above the project list.
4. Search and filter to find the group, role, or user you want to add to the projects.
5. Click **Add**.

Remove a user, role, or group from your project

1. In **Team Members**, select the group, role, or user you want to remove from the project.
2. Click **Remove** ⊖.

Assign a status to a user in your project

1. In **Team Members**, select the group, role, or user to which you want to assign a status.

2. Select a status for the group, role, or user:

   - **Set Non-privileged** allows users to view objects.

   - **Set Privileged** allows users to view objects and add or remove objects.

   - **Set Team Administrator** allows users to view objects, add or remove objects, and manage team members.

Assign a default project for your team member

1. In **Team Members**, select the group, role, or user to which you want to assign a default project.

2. Click **Set Default Project**.

   The user can confirm their default project from the global header by clicking the profile icon.

Assign a project during a Save As operation

If you are a privileged member of one or more projects, you can assign objects, such as parts and documents, to projects during a **Save As** operation.

1. Select a part, document, or another object.

2. Click **More commands** > **New** > **Save As**.

3. From the **PROJECTS** section, click **Add Project**.

4. Select one or more projects from the list of available projects.

5. Click **Assign** to assign the selected projects to the new item.

6. Click **Save** to save the projects added.

   You can verify the projects that were assigned from the **PROJECTS** section of the **Overview** tab of the newly created item.

Assign a project when creating a revision

If you are a privileged member of one or more projects, you can assign objects, such as parts and documents, to projects.

1. Select a part, document, or another object.

2. Click **More commands** ••• > **New** > **Revise**..

3. From the **Revise** dialog box, ensure **Revision** is set correctly.

4. From the **PROJECTS** section, click **Add Project** ⊕.

5. Select one or more projects from the list of available projects.

6. Click **Assign** to assign the selected projects to the new object.

7. Click **Save** to assign the projects to the new revision.

   You can verify the projects that were assigned from the **PROJECTS** section of the **Overview** tab of the newly created object.

Set or change an owning program

You can set the owning program on an object to control access to data.

- You must be a privileged user with **Assign to Project** access for the selected objects.
- The **autoAssignToProject** extension must be configured for object types.
- You can select one or more objects (for example, item or item revision) and set an owning program, if the selected objects do not have an owning program already set. Once set, the owning program is set for all related objects if propagation rules are defined for the respective relation. The projects list is also updated.
- You can change the owning program of an object.

Set an owning program

You can set an owning program for an object to control access to data. Once set, the owning program is set for all related objects if propagation rules are defined for the respective relation. The projects list is also updated.

1. Select one or more objects.

   > Note:
   >
   > You can select multiple objects and assign the owning program. However, the **Owning** tab displays the owning program only when the selected objects have the same owning program.

2. Click **Manage** > **Projects** .

3. Select the **Owning** tab to display the list of available projects.

4. Select an owning program and click **Set** .

5. Click **Save**.

   In the **Overview** tab, the **Owning Project** and **Projects** fields in the **PROJECTS** section are updated with the owning project information.

Change an owning program

1. Select one or more objects.

   > Note:
   >
   > You can select multiple objects and assign the owning program. However, the **Owning** tab displays the owning program only when the selected objects have the same owning program.

2. Click **Manage** > **Projects** .

3. Select the **Owning** tab to view the owning program.

4. From the list of available programs, select the new owning program. A **Replace** icon appears.

5. Click **Save**.

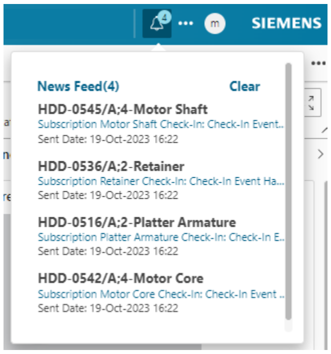
   In the **Overview** tab, the **Owning Project** and **Projects** fields in the **PROJECTS** section are updated with the owning project information.

5. Using Subscriptions

Overview of subscriptions

Subscriptions are objects you are following using the **Follow** command.

When the objects you are following are changed, for example, when your data is modified by another user or as the release status of an item revision changes, you receive notifications in near real time using external email, news feed, or both. In addition to these notifications, **Alerts** notifies you when subscription notifications are received.



Basic concepts

Use the Subscription feature to be notified of events, such as:

- An item or item revision is checked in or checked out (site or remote) or canceled.
- An item is modified or deleted.
- New subscription recipients.

Follow a single object

You can subscribe to follow a single object. When you no longer need to subscribe to the object, you can unfollow the subscription.

1. Select an object to follow and click **More commands** > **Share** > **Follow**.

   The **Follow** panel is displayed listing the default event types (**Assign Status**, **Attach**, and **New Item Revision**).

2. Select the event type you want to follow.

   a. Click **Edit** next to the **My Events** check box to view your selected events and the available events.

b. From **Available Events**, select an event from the event list and click **Add to selected events** ⊕.

   If you are already subscribed to an event type, that event type does not appear in the **Available Events** list.

c. Click **Back**.

3. Optionally, you can edit the object name.

4. Select the **Frequency** of the subscription. The default is **Immediately**.

   - **Immediately** (not collated)
   - **Daily** (daily digest)
   - **Weekly** (weekly digest)

5. Select the **Priority** of the subscription. The default is **Normal**.

   - **Normal**
   - **High**
   - **Low**

6. (Optional) In the **Followers** section, click **Add Follower** ⊕ to find a user to add as a follower. Filter or scroll to find the user you want to add as a follower. Select the user by their group and role and click **Add**. You can select and add multiple followers.

   When you unfollow the object, any followers you added will be unfollowed. Also, any followers you add to an object can unfollow the object at any time.

7. Click **Follow**.

Your subscription appears in **My Subscriptions**.

Follow multiple objects

You can subscribe to follow multiple objects at a time. When you no longer need to subscribe to the objects, you can unfollow the subscription.

Procedure

1. Select the objects you wish to follow and click **More commands** ••• > **Share** > **Follow**.

Event Type lists the types common to all selected objects. The number of objects to which you can subscribe at one time is configured by your administrator.

2. From **Event Type**, select the event type you want to follow.

3. Select the **Frequency** of the subscription. The default is **Immediately**.

   - **Immediately** (not collated)

   - **Daily** (daily digest)

   - **Weekly** (weekly digest)

4. Select the **Priority** of the subscription. The default is **Normal**.

   - **Normal**

   - **High**

   - **Low**

5. (Optional) In the **Followers** section, click **Add Follower** ⊕ to find a user to add as a follower. Filter or scroll to find the user you want to add as a follower. Select the user by their group and role and click **Add**. You can select and add multiple followers.

   When you unfollow the object, any followers you added will be unfollowed. Also, any followers you add to an object can unfollow the object at any time.

6. Click **Follow**.

Your subscription appears in **My Subscriptions**.

Follow an object type

You can follow an object type, for example, **Item** or **ItemRevision**.

1. Select a subscription in **My Subscriptions**.

2. Click **More commands** ••• > **Share** > **Follow Type** ⊕.

3. In the **Follow Type** panel, select the event type from **Other** you want to follow. Then, select the frequency and the priority. You can also add other users as followers.

4. Select the **Frequency** of the subscription. The default is **Immediately**.

- **Immediately** (not collated)
- **Daily** (daily digest)
- **Weekly** (weekly digest)

5. Select the **Priority** of the subscription. The default is **Normal**.

    - **Normal**
    - **High**
    - **Low**

6. (Optional) In the **Followers** section, click **Add Follower** ⊕ to find a user to add as a follower. Filter or scroll to find the user you want to add as a follower. Select the user by their group and role and click **Add**. You can select and add multiple followers.

    When you unfollow the object, any followers you added will be unfollowed. Also, any followers you add to an object can unfollow the object at any time.

7. Click **Follow**.

Your subscription appears in **My Subscriptions**.

Follow multiple events on an object

You can use the **My Events** list to follow multiple events on an object. However, the number of objects to which you can subscribe at one time is configured by your administrator.

1. Select an item revision, for example, Hard Drive Assembly, and click **More commands** ••• > **Share** > **Follow** .

    The **Follow** panel opens with **My Events** checked.

2. Click **Edit** to view selected events and available events.

    Three events, **Assign Status**, **Attach**, and **New Item Revision**, are configured by default.

3. You can scroll through the **Available Events** list and select additional events to follow. Click **Add to selected events** ⊕.

4. Once you have a selected list of events to follow, click **Back** .

5. Select the **My Events** check box to follow all the configured events and click **Follow**.

If an event type, such as **New Item Revision**, does not appear in the **Event Type** list, it is because it is not applicable for the selected object. Also, any non-applicable and already-subscribed-to events are filtered out.

Unfollow a subscription in My Subscriptions

You can subscribe to follow a single object, multiple objects, an object type, or events on objects. When you no longer need to subscribe to the objects, you can unfollow the subscription.

Procedure

1. Click the **SUBSCRIPTIONS** tile.

2. Select **My Subscriptions** to view your subscriptions.

3. Select the subscriptions you want to unfollow and click **Unfollow** . If you have only one subscription selected, you can also click **Unfollow** from the **Followers** area.

4. From the confirmation dialog box, click **Unfollow**.

   Both you and any followers you added to the subscription will no longer follow the object.

Unfollow a subscription in Added as Follower

You can subscribe to follow a single object, multiple objects, an object type, or events on objects. When you no longer need to subscribe to the objects, you can unfollow the subscription.

Procedure

1. Click the **SUBSCRIPTIONS** tile.

2. Select **Added As Follower**.

3. Select the subscriptions you want to unfollow and click **Unfollow** . If you have only one subscription selected, you can also click **Unfollow** from the **Followers** area.

   Only you will be removed as a follower. The user who added you as a follower on the object will continue to follow the object.

4. From the confirmation dialog box, click **Unfollow**.

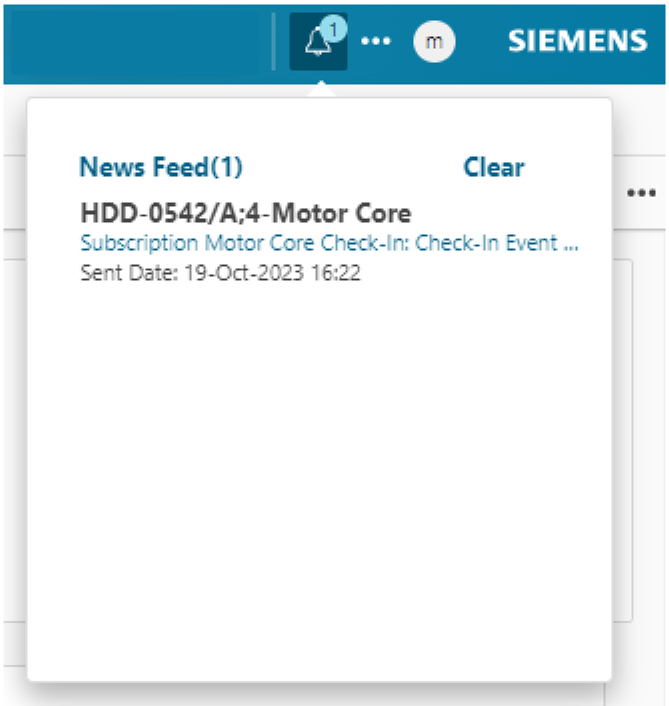
View notifications using Alerts

Alerts notifies you when specific items have changed. A number on the **Alerts** appears when notifications are received. If this button is not visible, your administrator has disabled it.

Click **Alerts** to view various types of notifications, such as:

- Print (indicating asynchronous print jobs are ready).
- News Feed (indicating a change has taken place on an object or activity to which you are subscribed).
- Document Management (indicating document rendering is complete or document property updates are complete).

You can click on the category, for example, **News Feed**, to see details on the notifications.



If you click an object, the target page for the object displays.

- When you click on a notification, the counter decreases by one (1).
- To clear all notifications, click **Clear**.
- A maximum of 10 alerts is displayed per category.

View and delete notifications and subscriptions

You can view and optionally delete notifications and subscriptions using the **SUBSCRIPTION** tile.

1. From the home page, click the **SUBSCRIPTION** tile.

2. From the **Subscriptions** page, use the following:

   - **News Feed** to view and delete your *notifications*.
   - **My Subscriptions** to view and delete *subscriptions* that you configured.

- **Added As Follower** to view and delete *subscriptions* to which you have been added as a follower.

Filter your news feed notifications

From the **News Feed** tab on the **Subscriptions** page, you can filter your news feed notifications to easily access the notifications you want to view.

When notifications are available, the **Filters** panel is open by default. Once you close the **Filters** panel in a session, it remains closed for that session.

1. Click the **SUBSCRIPTIONS** tile.

2. Click **News Feed** to display your notifications.

3. If the **Filters** panel is not already displayed, click **Filters** to display it. The **Filters** panel shows categories of subscription notifications, such as: **Message Type** and **Event**.

4. Select from the different categories. For example, by selecting **Subscription Manager**, you only see notifications pertaining to Subscription Manager.

5. To save your filter selection for later use, click **Save Filter Selection**. Notifications from the saved filter are loaded when the **News Feed** tab is displayed.

   To modify the saved filter selection, change the filter selection and save it.

Managing your subscriptions

Add followers to your subscriptions

You can add followers to existing subscriptions.

1. Click the **SUBSCRIPTIONS** tile.

2. Click **My Subscriptions** to display your existing subscriptions.

3. Select the subscription to which you want to add followers.

   Notice that your name already appears in the table in the **Followers** section of the **Overview** tab of the item to which you have subscribed.

4. Click **Edit** .

5. In the **Followers** section, click **Add Follower** .

6. Filter for or scroll to the user you want to follow your subscription.

7. Select the user by their group and role. You can select multiple users. Click **Add**.

8. Click **Save** to save the followers displayed in the **Followers** table.

   The users you added as followers can now view their new subscription by clicking **Added As Follower** on the **Subscriptions** page.

Add an expiration date to your subscriptions

You can add an expiration date to each of your subscriptions if your administrator enabled the expiration date feature.

1. Click the **SUBSCRIPTIONS** tile.

2. Click **My Subscriptions** and select an existing subscription.

3. Click **Edit** to edit the **Properties** section. Add an expiration date for the desired subscription.

   > Note:
   >
   > If you want to change your subscription to inactive, clear the **Is Active** check box.

4. Click **Save**.

Change the owner of your subscription

You can change the owner of your subscription. This is helpful if you are leaving the project or the company.

1. Click the **SUBSCRIPTIONS** tile.

2. Click **My Subscriptions** and select an existing subscription.

3. Click **More commands** ••• > **Manage** > **Change Owner**.

4. Select the new owner on the **Change Owner** panel and click **Transfer**.

   This immediately removes the subscription from your **My Subscriptions** list.

Temporarily transfer notification of your subscriptions

You can temporarily transfer notification of your subscriptions. This is especially helpful if you are going to be out of the office for a period of time. You can select a colleague to take over as owner of the subscription during that time.

1. Click the **SUBSCRIPTIONS** tile.

2. Click **My Subscriptions** and select an existing subscription.

3. Click **More commands** ••• > **Share** > **Transfer Notification**.

4. From the **Transfer Notification** panel, select the start and end dates for the transfer notifications and add a follower as a temporary notifier.

5. Click **Transfer** to save your changes.

   The following fields in the **Properties** section are updated:

   - **Temporary Notifier**
   - **Temporary Notification Start Date**
   - **Temporary Notification End Date**

Set your subscription notification method and retention time

You can specify how you want to receive your subscription notifications and specify how long your notifications are retained.

Use the **Subscriptions** section on your **Profile** page to:

- **Set your subscription notification method.**

  You can receive your subscription notifications in near real time using either external email, news feed or both depending on your notification method.

- **Set your news feed retention time.**

  You can indicate whether you want to retain your news feed for a few days or if you want to keep your news feed messages indefinitely.

Set your subscription notification method

1. From your **Profile** page, click **More commands** ••• > **Edit** > **Start Edit**.

2. From the **Notification Method** list in the **Subscriptions** section, select one of the notification methods.

3. (Optional) Select the option of receiving daily and weekly digests that collate all notifications.

4. Click **More commands** ••• > **Edit** > **Save Edits** to save your selections.

Set your news feed retention time

You can specify whether you want to retain your news feed for a few days or if you want to keep your news feed messages indefinitely.

1. From your **Profile** page, click **More commands** ••• > **Edit** > **Start Edit**.

2. In the **Retain News Feed (In Days)** field, enter the number of days you want to keep your news feed messages.

   Leave this field empty (the default) to retain news feed messages indefinitely.

3. Click **More commands** ••• > **Edit** > **Save Edits**.