



TEAMCENTER

Program Planning

Teamcenter 2412

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1. Overview of Program Planning

About Program Planning

Program Planning enables organizations to efficiently coordinate the various work activities of multiple functional teams in the PLM environment. It provides enterprise-wide visibility into top-level projects and their major event dates. With Program Planning, all stakeholders involved in the successful delivery of products, from the planning office, program managers, and product managers to department heads, team leaders and team members, can plan and coordinate work across the enterprise using a structured, yet flexible, mechanism.



How you work on programs in Active Workspace depends on your role. The following are the common roles involved with program planning and the actions they typically perform:



- The program manager creates the programs, adds event dates and other program objects, assigns responsible users, and updates the program properties.
- The responsible user is assigned to a program object, such as an event, risk, subproject, or issue, and completes the work for the assigned component.
- The administrator configures program planning features, such as list of values (LOVs), event code colors, program security, data sharing between Teamcenter sites, and deep copy rules.

Note:

Sharing data using Multi-Site Collaboration is not supported with Program Planning.

Where do I go from here?

The links below take you to common tasks based on the roles described above.

 I'm a program manager and I want to:	
Use the program timeline to manage my programs.	Assign resources to program objects.
Create a new program.	Add a deliverable to a program object.
Add schedules to my program.	Create program deliverable dependencies.
Add an event to my program.	Add risks, issues, and opportunities to my program.
 I'm a user assigned to a program object and I want to:	
Modify a program deliverable's properties.	Modify a program event.
Replace a program deliverable revision.	Modify a program risk, issue, or opportunity.

What are programs, projects, subprojects and events?

Program Planning utilizes programs, projects, subprojects and events. Viewed collectively, these elements comprise the program plan. To use Teamcenter Program Planning features, you must create a program plan.

Term	Description	Examples
Program	An investment-oriented business or technical initiative usually involving cross-functional teams over an extended period of time. A program can consist of projects and subprojects.	Hybrid motor for 2020 product launch
Project or subproject	Organizational or functionally oriented decompositions of the program, which may have line of business, top-level subassembly, or end-product orientation.	<ul style="list-style-type: none"> • Prime mover • Electric motor • Converter • Transmission
Event	Representation of significant point-in-time program, project, or subproject inflection points.	<ul style="list-style-type: none"> • Executive Approval • Virtual Build Event • Design Completion • Physical Build Event • Start Regular Production

Program Planning configuration

Program Planning configuration overview

What is Program Planning?

Program Planning enables organizations to efficiently coordinate the various work activities of multiple, functional teams by providing enterprise-wide visibility into top-level projects and their major event dates.

Complete the preconfiguration tasks

Prior to configuring Program Planning, you must **complete the preconfiguration tasks**.

What can I configure?

You can configure the following areas of Program Planning:

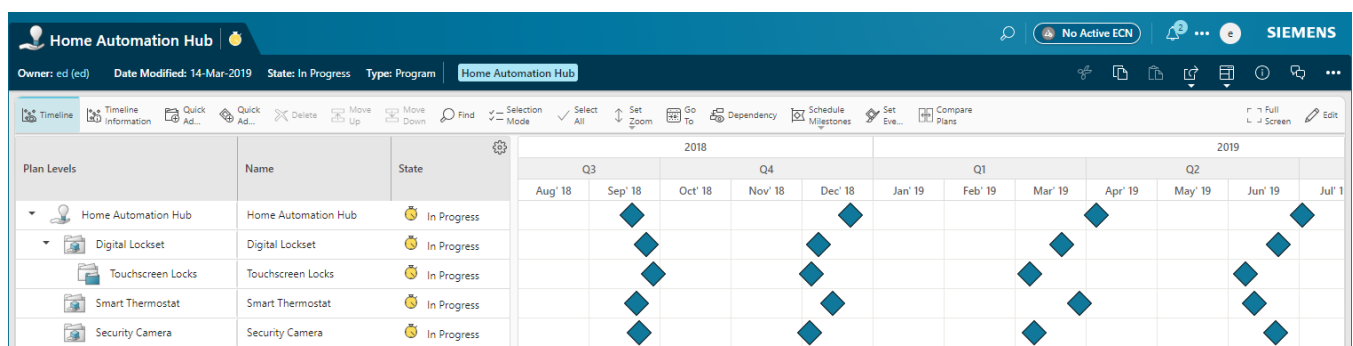
- Ensure that LOVs more accurately reflect your business use by configuring the **out-of-the-box LOVs**.
- Define the Schedule Template Attribute Maps (STAM) and Schedule Template Value Maps (STVM) to define which **attributes and attribute values** your organization uses when automatically generating schedules from ECNs.
- Define whether program objects are automatically added to the program's Teamcenter project by setting the **program security**.

After Installing Program Planning

After you have installed Program Planning, there are several **post-installation tasks** that must be completed, including changes made to **Organization, Access Manager, and Dispatcher**.

What do programs look like?

Following is an example of a program.



Program Planning preconfiguration tasks

Before you can configure Program Planning, you must install the required applications using either Deployment Center or Teamcenter Environment Manager (TEM) and load the necessary templates in Business Modeler IDE.

Find more information about Active Workspace features in the Teamcenter Installation on Windows or Teamcenter Installation on Linux guides.

Install the Program Planning features

Install Program Planning applications in your preferred installation tool:

Deployment Center:	TEM:
<p>Program Planning Infrastructure</p> <p>Program Planning</p>	<ul style="list-style-type: none"> • Within Features, select the following: <ul style="list-style-type: none"> • Program Planning (client) <p>Enables the program management capability in Active Workspace.</p> • (Optional) Schedule Manager (client) <p>Allows Active Workspace users to relate schedules and change objects.</p> • (Optional) Change Management (client) <p>Allows Active Workspace users to relate programs, projects, and subprojects to change objects.</p> • Program Planning Execution Client <p>Program Planning execution features for the Active Workspace client.</p> <ul style="list-style-type: none"> • (Optional) Change Management on Active Workspace — Usage Schedule Manager <p>Allows Active Workspace users to relate schedules and change objects.</p> • (Optional) Program Change Client <p>Allows Active Workspace users to relate programs, projects, and subprojects to change objects.</p> • (Optional) Program Planning Event Change Client

Deployment Center:	TEM:
	<p>Allows Active Workspace users to relate events to change objects.</p> <ul style="list-style-type: none"> • (Optional) Program Schedule Manager Client <p>Allows Active Workspace users to create plan-level items to schedules and supports automatic generation of schedules within a program.</p> <ul style="list-style-type: none"> • Within Enterprise knowledge Foundation, select the following: <ul style="list-style-type: none"> • (Optional) Change Management on Active Workspace — Usage • Dispatcher Server • Dispatcher Client • Program Planning (server) <p>Enables the program management capability in Active Workspace.</p> <p>Select Active Workspace → Server Extensions → Program Planning.</p> <ul style="list-style-type: none"> • Program Planning • (Optional) Schedule Manager • Program Planning Execution <p>Program Planning execution features for Active Workspace.</p> <ul style="list-style-type: none"> • (Optional) Change Management on Active Workspace — Usage Schedule Manager <p>Allows Active Workspace users to relate schedules and change objects.</p> <ul style="list-style-type: none"> • (Optional) Program Change <p>Allows Active Workspace users to relate programs, projects, and subprojects to change objects.</p> <ul style="list-style-type: none"> • (Optional) Program Planning Event Change <p>Allows Active Workspace users to relate events to change objects.</p>

Deployment Center:	TEM:
	<ul style="list-style-type: none"> • (Optional) Program Schedule Manager Allows Active Workspace users to create plan-level items to schedules and supports automatic generation of schedules within a program. • Dispatcher Components <ul style="list-style-type: none"> • Dispatcher Scheduler • Dispatcher Client • Dispatcher Module • Select Translators • AsyncService

Load the templates

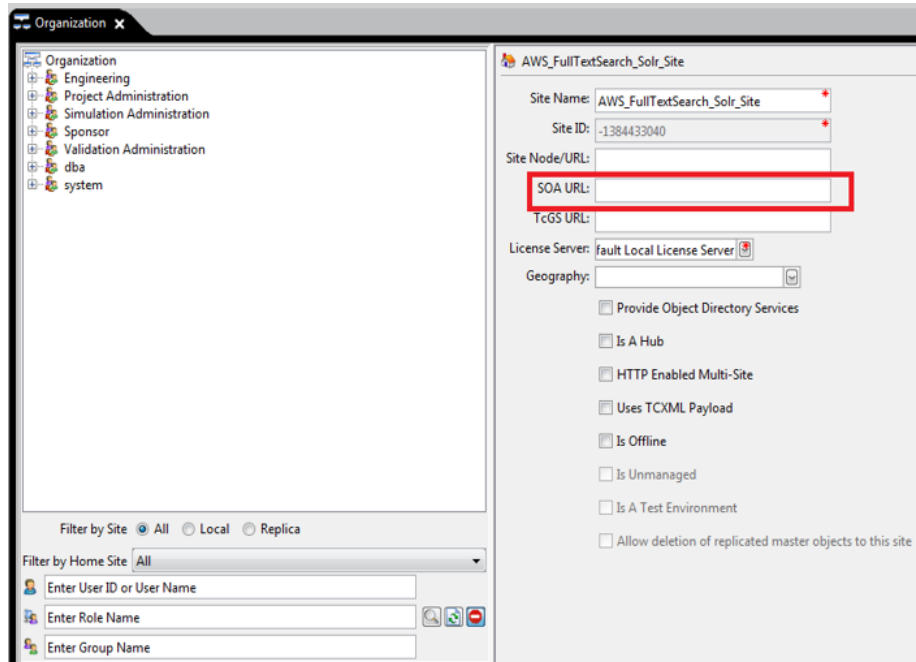
These templates can be found in tcdata\model\ in Business Modeler IDE.

Installation Order	Template Name	Description
1	foundation	Foundation (Required)
2	aws2	Active Workspace (no dependencies)
3	prg0programinfra	Program Planning Infrastructure (no dependencies)
4	pgp0awprgplanning	Program Planning (Dependent on 2 and 3)
5	cm	Change Management on Active Workspace — Usage (Dependent on 7)
6	saw1projectmanagementaw	Schedule Manager (Dependent on 8)
7	psi0ppsminterface	Program Planning Schedule Management on Active Workspace — Usage Interface (Dependent on 3, 4, and 6)
8	pch0pchinterface	Program Change Interface (Dependent on 9)
9	pec0ppeventchange	Program Planning Event Change

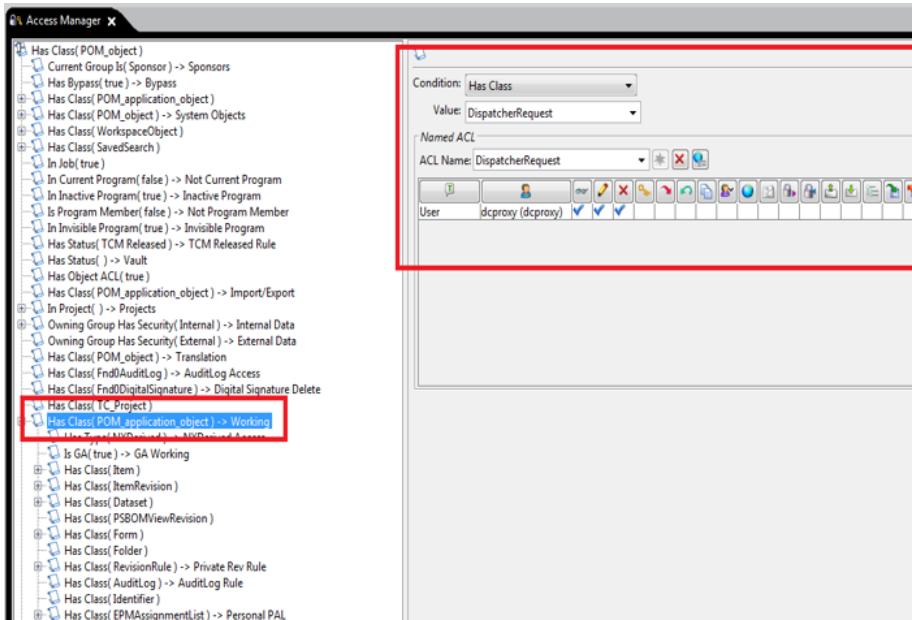
Program Planning post-installation configuration tasks

After installing Program Planning, you must complete the following tasks:

- Navigate to **Organization** in Teamcenter and modify the site name in the **SOA URL** box using the pattern: `http://<MachineName>:7001/tc`.



- Navigate to **Access Manager** in Teamcenter and do the following:
 - Under **Has Class (POM_application_object) → Working**, create an ACL named **DispatcherRequest**.
 - Assign read, write, and delete privileges to the **dcproxy** user.



• To support async operations, in the **Dispatcher** installation directory, run the .bat files located in the bin folders of **Scheduler**, **Module**, and **Dispatcher Client** directories. The required files are listed below in the order they should be run.

1. \Scheduler\bin\runscheduler.bat
2. \Module\bin\runmodule.bat
3. \DispatcherClient\bin\runDispatcherClient.bat.

Refer to the *Dispatcher — Deployment and Administration* in the Teamcenter help for configuration instructions.

Async operations are required in Program Planning for generating schedules.

Configure out-of-the-box Program Planning LOVs

The following out-of-the-box Schedule Manager LOVs can be configured in Business Modeler IDE (BMIDE) to better represent your business.

Program LOVs that you can configure:

- **State**

Reflects the current state of the program.

Predefined values are: **Not Started, In-Progress, Complete, Closed.**

- **Classification**

Used to label a program, project, or subproject. For example, an organization could classify a program's significance to the organization (high, medium, low) or program's complexity (complex, moderate, simple).

This LOV has no predefined values.

Event LOVs that you can configure:

- **State**

Reflects the current status of the event.

Predefined values are: **Not Started, In-Progress, Complete, Closed.**

- **Event Code**

Identifies the events that are applicable to your business. This LOV has no predefined values. Your organization's programs may include kickoff events, design review events, and release to market events as values to define.

In addition to defining the event code values, you can **define a unique color** to each event code value.

Criteria LOVs that you can configure:

- **State**

Reflects the current status of the criterion.

Predefined values are: **New, Open, In-Process, Ready, Pass, Fail.**

Program deliverable LOVs that you can configure:

- **Deliverable Type**

Identifies a functional or other classification of the program deliverable.

Predefined values are: **End Item, Sourced Item, Internal Item, Program Management, Quality Management, Other.**

Risk, issue, or opportunity LOVs that you can configure:

- **State**

Reflects the current status of the program risk, issue, or opportunity.

Predefined values are: **In Progress, Closed, Canceled.**

- **Priority**

Indicates the importance of the program issue.

Predefined values are: **Critical, High, Medium, Low.**

- **Impact**

Indicates the effect of the program risk or opportunity on the plan. Each value is associated with a number (5 - 1), which is used to calculate the **Risk Score** (Impact x Probability = Risk Score).

Predefined values are: **Severe, Major, Moderate, Minor, Insignificant.**

- **Strategy—Risk**

Identifies the plan of action for handling this program risk.

Predefined values are: **Not Applicable, Accept, Avoid, Mitigate, Transfer.**

- **Strategy—Opportunity**

Identifies the plan of action for handling this program opportunity.

Predefined values are: **Not Applicable, Accept, Enhance, Exploit, Share.**

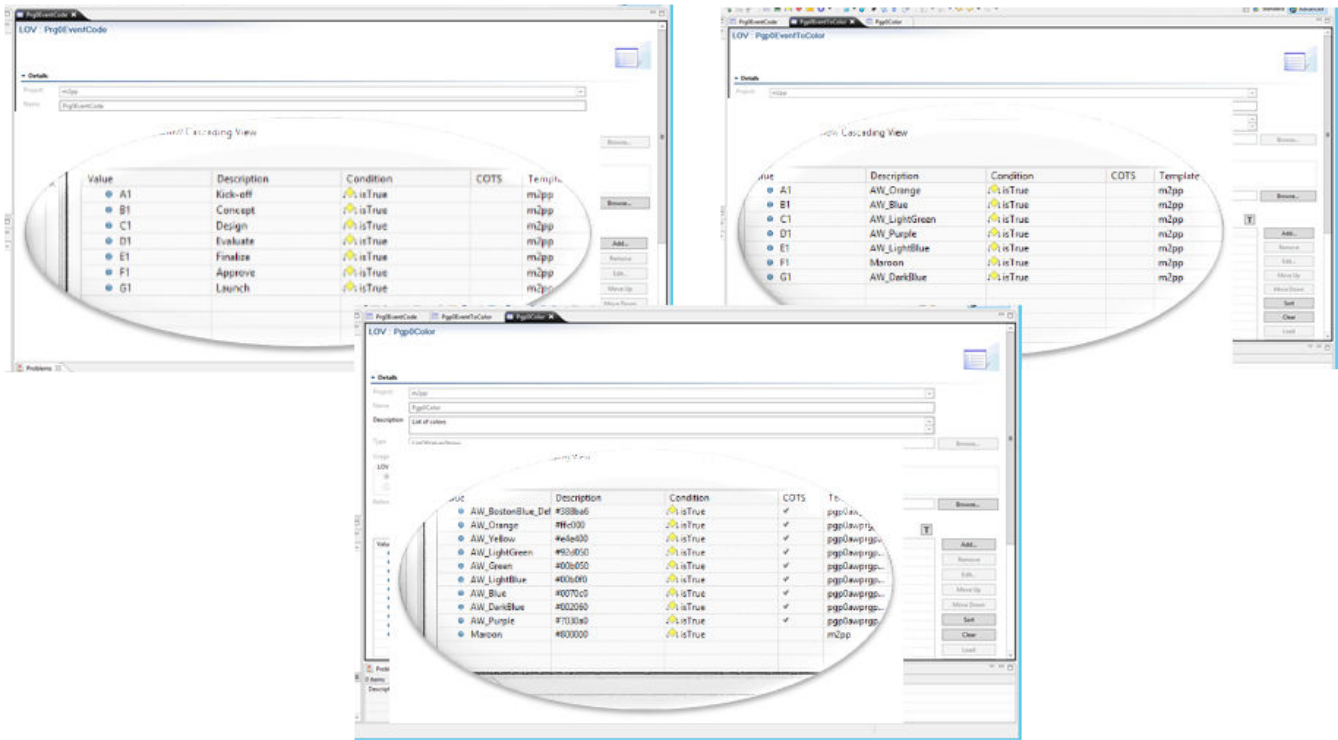
Assign colors to the program event LOVs

As an administrator, in addition to defining the **Event Code** LOV (Prg0EventCode) on the program **Add Event** panel, you can assign each program event value a different color (Pgp0Color) for easy identification on the program timeline. For example, kick-off events may show as green, design review events may show as blue, and release events may show as yellow. The default event code color is AW_Boston_Blue (#388ba6).

Use the Prg0EventCode LOV to define the **Event Code** value based on your company's best practices. Use the Pgp0Color LOV to define a library of colors, including hex codes, which can be assigned to events. Use the Pgp0EventToColor LOV to map a defined **Event Code** to a defined color.

Note:

Maximum allowable length for the **Event Code** value is 12 characters.



In Active Workspace, the end user picks the desired event type from the **Event Code** LOV, and the event displays in the program timeline in the color associated with that event type.



Instructions for adding values to existing LOVs is discussed in *Configure Your Business Data Model in BMIDE*.

Assign icons to program events

As an administrator, you can assign a custom icon to each program event type for identification on the program timeline. In Active Workspace, the end user can only view the custom icons displayed on the program timeline.

Instructions for adding icons is discussed in *Configure Your Business Data Model in BMIDE*.

Define Program Planning security

Define Program Planning program security using the following preference and program field. When program security is configured, program objects are automatically added to the program's Teamcenter project when the object is created.

Set the **Program_Management_Security** site preference to **1** (default is 0) to automatically create a **Tc_project** for the Program Planning program. This will also automatically assign the program's projects and subprojects to the **Tc_project** when they are created.

When the **Program_Management_Security** preference is set to **1** and the **Content Security** field value for the program, project, or subproject is set to **True**, the **Tc_project** security also propagates to program deliverables, deliverable instances, changes, schedules, events, event criteria, attachments, risks, issues, opportunities, and checklist associated with the program, project, or subproject. The **Content Security** field is located on the **Overview** tab of the program, project, and subproject.

Note:

The **Content Security** field must be set at each plan level (program, project, and subproject) in order to propagate all plan objects to the Teamcenter project. If this field is not set for one level of the plan—for example, the project—then only the objects for the program and subproject are propagated to the Teamcenter project.

Add custom program and project objects

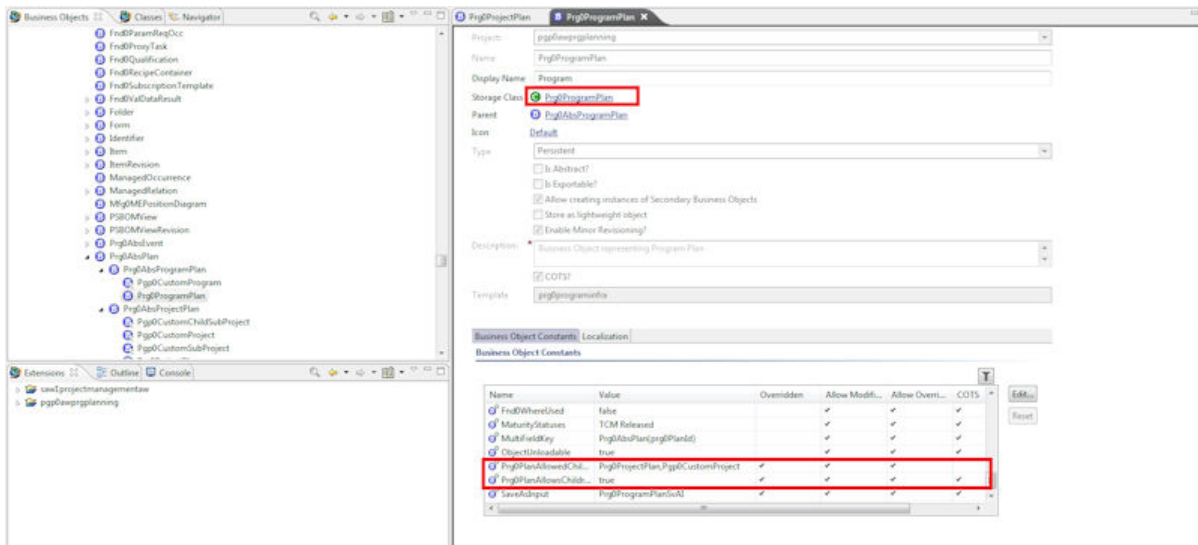
Use this procedure to add custom subtype objects to the **Prg0AbsProgramPlan** and **Prg0AbsProjectPlan** Program Planning objects. Unlike how other custom business objects within Teamcenter are subtyped, the parent-child relationship for these two objects is governed by the **Prg0PlanAllowsChildren** and **Prg0PlanAllowedChildTypes** business object constants.

Note:

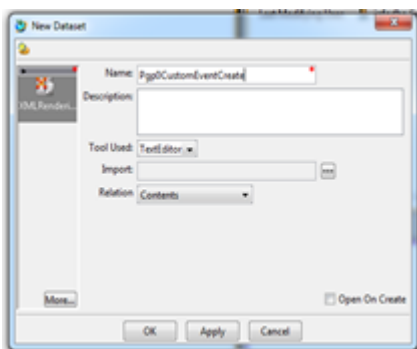
The **Prg0AbsEvent** and **Prg0AbsCriteria** objects are directly subtyped like any other business objects in Teamcenter.

1. In Business Modeler IDE, select either the **Prg0AbsProgramPlan** or **Prg0AbsProjectPlan** business object, depending on where you want to create the new custom subtype object.
2. Add the new custom subtype object under the selected business object.
3. Select the business object (**Prg0AbsProgramPlan** or **Prg0AbsProjectPlan**) where you added the custom object and under the **Business Object Constants** section, do the following.
 - Set the **Prg0PlanAllowsChildren** constant to **true**.

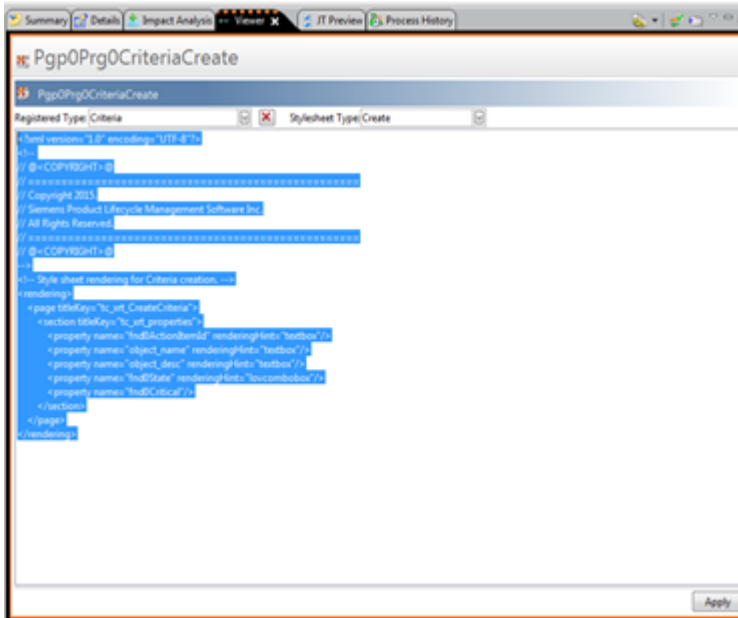
- In the **Prg0PlanAllowedChildTypes constant**, enter the name of the custom subtype object. If you created more than one custom subtype object, enter then names as comma separated strings.



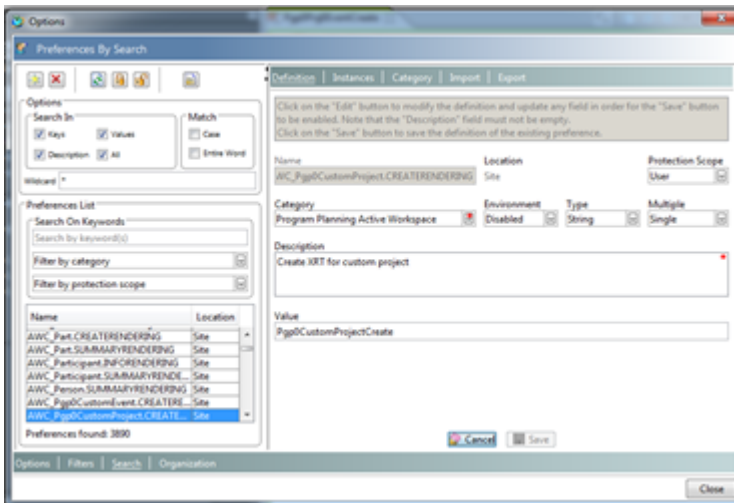
4. Create a corresponding XML rendering style sheet (XRT) for the custom object (project, event, or criteria).
 - a. Log on to Teamcenter rich client as an administrator and navigate to My Teamcenter.
 - b. Create a new **XMLRenderingStylesheet** dataset.



- c. Search for the appropriate dataset, depending on the custom object: **Pgp0ProjectPlanCreate** (custom project), **Pgp0Prg0EventCreate** (custom event), or **Pgp0Prg0CriteriaCreate** (custom criteria).
 - d. Click the **Viewer** tab and copy the contents of the dataset.



- e. Paste the copied content into your custom XML rendering style sheet.
- f. Create a new preference named **AWC_<Custom Class Name>.CREATERENDERING**.



- g. Restart the Teamcenter server and then log off and back on to Active Workspace.

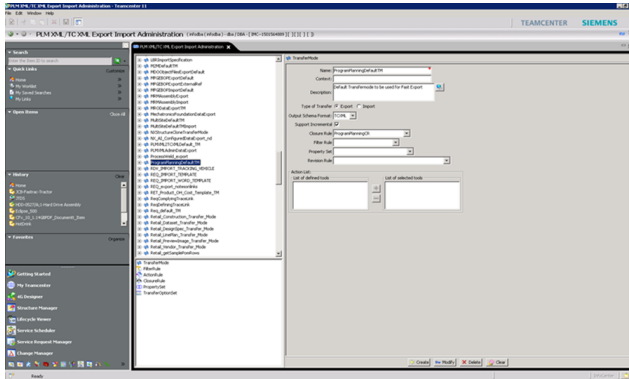
Share Program Planning data between Teamcenter sites

As an admin, you can export Program Planning data from one Teamcenter site and import it into another Teamcenter site. For example, if you want to move data from a test environment into a production environment.

Prerequisite Steps

Before exporting and importing data, complete the following steps at both the source and destination sites.

1. In Teamcenter, click **Windows > Open Perspective > Other > PLM XML/TC XML Export Import Administration** and verify that **ProgramPlanningDefaultTM** is installed in Teamcenter.



2. If **ProgramPlanningDefaultTM** is not installed, in the Teamcenter command prompt, enter the following command to import the mode:

```
tcxml_import -u=Tc-admin-user -p=password -g=group -scope_rules
-scope_rules_mode=append -file=%Tc_Root%\install\prg0programinfra /
programplanningdefaultTOS.xml
```

3. Generate the Administration Data Comparison report to compare the source and destination structures, since both sides must have the same data structure, including Tc_project, objects, and users.

Export and Import data

Use the Teamcenter plmxml_export and plmxml_import utilities to export Program Planning data from one Teamcenter site and import it into another Teamcenter site.

1. On the source site, navigate to the Teamcenter command prompt and enter the following.

```
tcxml_export -u=<username> -p=<password> -g=<group>
-input_criteria=Prg0ProgramPlan{prg0PlanId =<Program ID>} -bulk_extract
-optionset=ProgramPlanningBulkExtractDefault -file=<name of file>.bcz
```

The **ProgramPlanningBulkExtractDefault** option set is mandatory for export. If you do not specify the output file path, then the Briefcase file is generated in **<TC_ROOT>\ltc_menu**.

2. Copy the Briefcase file (.bcz).

3. On the destination site, paste the Briefcase file in **<TC_ROOT\tc_menu>** (or in a custom folder).
4. On the destination site, do the following to add the bulk load argument to the plmxml_import utility.
 - a. Login to Teamcenter as a dba.
 - b. Search for the **BulkLoadDefault** option set and add the **opt_bulk_load_in_prod** option.
 - c. On the destination site, navigate to the Teamcenter command prompt and enter the following.

```
tcxml_import -u=Tc-admin-user -p=password -g=group -file=file-name.bcz
-bulk_load
```

Note:

If the file is in a custom file, use the full path name as shown above. If the file is in **<TC_ROOT>\tc_menu** then enter only the file name (**=<name of file>.bcz**).

Program save as behavior default deep copy rules

Program save as behavior can be configured through deep copy rules in BMIDE. The table below shows the default deep copy rules used when saving a program as a new program.

Primary	Secondary	Relationship	Option
Program	Events	Reference	Copy as object
Program	Project	Reference	Copy as object
Program	Deliverables - PDR	GRM	Copy as object
Program	Risks	GRM	Copy as object
Project	Events	Reference	Copy as object
Project	Subproject	Reference	Copy as object
Project	Deliverables - PDR	GRM	Copy as object
Project	Risks	GRM	Copy as object
Subproject	Events	Reference	Copy as object
Subproject	Deliverables - PDR	GRM	Copy as object
Subproject	Risks	GRM	Copy as object
Events	Criteria	Reference	Copy as object
Events	Deliverables - PDR	GRM	Copy as object
Events	Checklists	GRM	Copy as object
Events	Risks	GRM	Copy as object

Primary	Secondary	Relationship	Option
Deliverables	Deliverable instances (any Teamcenter objects)	GRM	Copy as object
Checklists	Checklist questions	GRM	Copy as object
Primary	Secondary	Relationship	Option
PrgOAbsPlan	Change, Schedule, Issue, Opportunity	GRM	Do not copy

Define STAMs and STVMs

What are STAMs and STVMs?

The Schedule Template Attribute Map (STAM) defines which attribute your organization uses when automatically generating schedules from ECNs. The Schedule Template Value Map (STVM) defines the actual value of the attribute you defined in the Schedule Template Value Map (STAM). You can create more than one STAM/STVM pair for each schedule.

Before the program manager can automatically generate schedules from change notices, a system administrator must create Schedule Template Attribute Maps (STAM) and Schedule Template Value Maps (STVM). These two maps work together to identify which attributes and values are used when schedules are automatically generated from the change. Typically, the system administrator creates the necessary STAMs and STVMs prior to the start of the program, and the same STAM/STVM pairs are used throughout the duration of the program.

Example:

Name	Description	Source obj. type	Source obj. attribute	Source obj. attribute value
Part_STAM	Mapping attributes for parts	Item revision	Source	
Part_STVM	Parts made in North America			Make
	Parts purchased in North America			Buy

Create a Schedule Template Attribute Map (STAM)

The system administrator creates the Schedule Template Attribute Map (STAM) to define which attribute your organization uses when automatically generating schedules from ECNs. You can create more than one STAM/STVM pair for each schedule.

1. From the **Explorer** location, navigate to the **Home** folder.
2. Click **More Commands ...** > **New** ✨ > **Add** ⊕.
3. In the **Add** panel, specify **Schedule Template Attribute Map** as the **Type**.
4. Define the STAM values.
5. Click **Add**.

Field definitions for STAM

The system administrator defines the Schedule Template Attribute Map (STAM) attributes.

Field name	Definition	Valid values
Name	Identifies this STAM.	
Description	Describes this STAM.	
Context	Identifies whether the schedule is generated from an event's change notices (impacted item) or from an event's program deliverables (deliverable instance).	Impacted item Deliverable instance Program Deliverable
Source Object Type	Identifies the Teamcenter object class for which schedules are automatically generated from the designated schedule template. Enter the object name exactly as it appears in the Business Modeler IDE.	Varies, depending on your Teamcenter configuration.
Source Object Attribute	<p>Identifies the attribute on the object class identified in the Source Object Type box. This value is optional.</p> <p>Specify a value only if the template selection is based on the object class and value of the attribute on the object class. Enter the attribute name exactly as it appears in the Business Modeler IDE (without the object class prefix). If an attribute is specified, the system looks for a corresponding STVM.</p>	Example: object_name

Field name	Definition	Valid values
Project (project-level security)	Associates this template to a security-level project. The project consists of entities that correlate groups of users with the data associated with a given project or subset of a project. Project-level security is defined by your system administrator. Templates that are not associated with a security-level project are open for access by everyone.	
Default Schedule Template	Identifies the schedule template to use when a change schedule is automatically generated. The default schedule template is used when the template selection is based only on the object class (for example, there is no STVM) or when the Source Object Attribute is specified but Teamcenter could not find a corresponding STVM.	Select from the list of defined schedule templates for your organization.

Create a Schedule Template Value Map (STVM)

The system administrator creates the Schedule Template Value Map (STVM) to specify the schedule template to be selected by the autogeneration process for a given object class and the value of the specified attribute on that object class. As a system administrator, create an STVM only after you have created the STAM for the object class.

1. Navigate to the **Home** folder.
2. Click **More Commands ...** > **New** ✨ > **Add** ⊕.
3. In the **Add** panel, specify **Schedule Template Value Map** as the **Type**.
4. Define the STVM values.
5. Click **Add**.

Field definitions for STVM


The system administrator creates the Schedule Template Value Map (STVM) to specify the schedule template to be selected by the autogeneration process for a given object class and the value of the specified attribute on that object class. As a system administrator, create an STVM only after you have created the STAM for the object class.

Field name	Definition	Valid values
Name	Identifies this STVM.	
Description	Describes this STVM.	
Schedule Template Attribute Map	Identifies the STAM for which this STVM is being created.	Click the ⊕ to select a STAM, and then click Set .
Source Object Attribute Value	Identifies the value of the source object attribute that maps to the selected STAM.	
Project (project-level security)	Associates this template to a security-level project. The project consists of entities that correlate groups of users with the data associated with a given project or subset of a project. Project-level security is defined by your system administrator. Templates that are not associated with a security-level project are open for access by everyone.	
Schedule Template	Identifies the schedule template to use when a change schedule is automatically generated.	

2. View my programs

As a program manager or project planner, you can quickly view and manage all your programs, events, and program deliverables from the **Programs** location.

Procedure

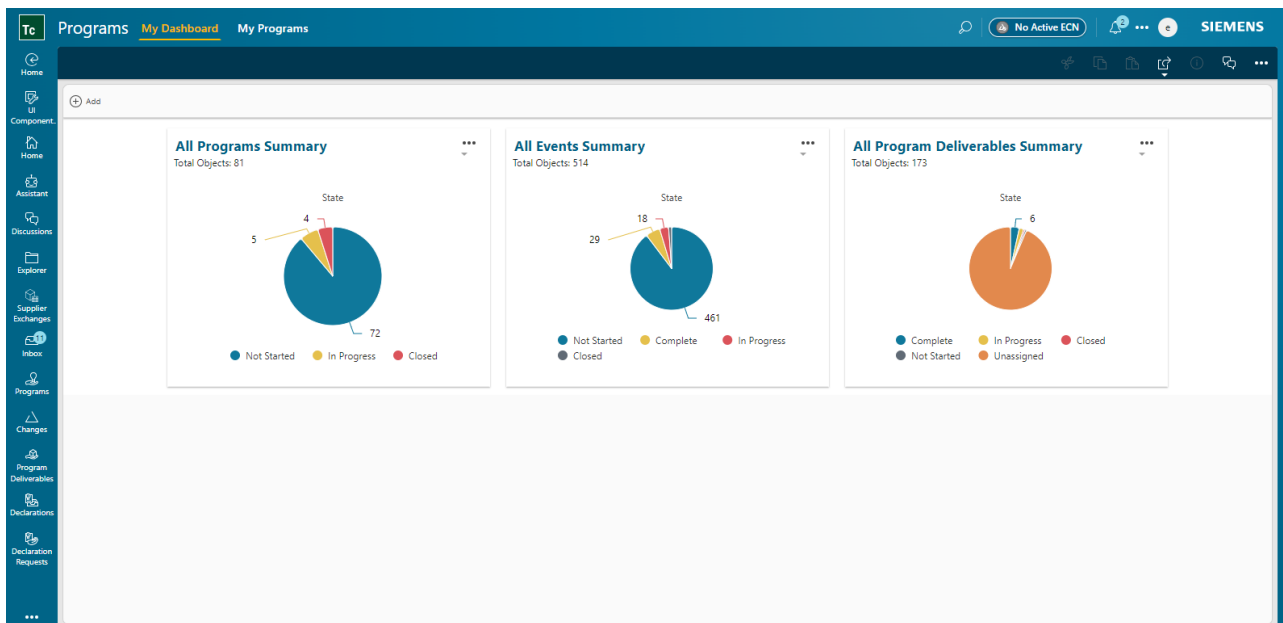
1. View and open a program in one of these ways:
 - Click the **PROGRAMS** tile on your home page.
 - Click the **PROGRAMS** icon from the global navigation.
 - Search for the program using the search box or navigate to the program in your folder structure and click **Open** .

The **Programs** window opens with the **My Dashboard** page automatically selected.

2. On the **My Dashboard** page, click a report to open it.

Program reports include:

- **All Programs Summary**
- **All Events Summary**
- **All Program Deliverables Summary**



The **My Dashboard** page can be configured and may differ from the descriptions in this documentation. For more information, see *Report Builder*.

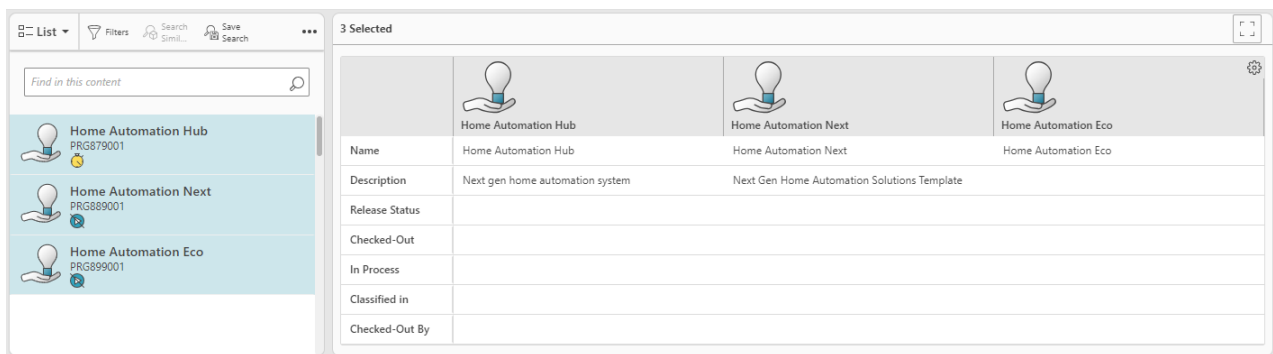
3. Click the **My Programs** page to view all your programs and their details.

3. View and compare programs

Compare programs, schedules, events, and other objects

As a program or project planner, you can compare the planning properties for multiple programs, projects, schedules, events, or other objects from the folder structure or program timeline.



1. Navigate to the program, project, schedule or event in your folder structure or from the program timeline.
2. Using multiselect mode, select the desired objects to compare.
3. Review and compare the properties for the selected objects.



View and compare a program with past programs



As a program manager, view and compare a program with similar past programs, projects, or subprojects on the program timeline.

Procedure

1. Select the desired program, project, or subproject from the program timeline.
2. Click **Compare Plans** .
3. In the **Compare Plans** panel, click **Add** .

You can add up to two plans for comparison with the current plan.


4. In the **Add** panel, do one of the following:

To	Do
Search for an existing plan.	<ol style="list-style-type: none"> Click the Search tab. Enter the search criteria and click Search . Select a plan from the returned list.
Select a plan that was previously copied to the past buffer using Copy  .	<ol style="list-style-type: none"> Click the Palette tab. Select a plan from the Clipboard section.
Select a favorite or recently viewed plan.	<ol style="list-style-type: none"> Click the Palette tab. Select a plan from the Favorites or Recent section.


5. Click **Compare**.

6. Review and compare the current program with the past programs selected.


Source: Home Automation Hub


September 2018													
16 Sep - 22 Sep		17 Sep - 23 Sep (Week 38)						24 Sep - 30 Sep (Week 39)					
16, Sun	17, Mon	18, Tue	19, Wed	20, Thu	21, Fri	22, Sat	23, Sun	24, Mon	25, Tue	26, Wed	27, Thu	28, Fri	
													








Compare with: Home Automation Next ⊖ Remove

September 2018													
29 Sep - 05 Oct (Week 39)		01 Oct - 07 Oct (Week 40)						08 Oct - 14 Oct (Week 41)					
29, Sat	30, Sun	01, Mon	02, Tue	03, Wed	04, Thu	05, Fri	06, Sat	07, Sun	08, Mon	09, Tue	10, Wed	11, Thu	
													

Compare with: Home Automation Eco ⊖ Remove

August 2018													
06 Aug - 12 Aug (Week 31)		08 Aug - 14 Aug (Week 32)						15 Aug - 21 Aug (Week 33)					
06, Sat	07, Sun	08, Mon	09, Tue	10, Wed	11, Thu	12, Fri	13, Sat	14, Sun	15, Mon	16, Tue	17, Wed	18, Thu	
													

3 Selected 

	 Home Automation Hub	 Home Automation Next	 Home Automation Eco 
Name	Home Automation Hub	Home Automation Next	Home Automation Eco
Plan ID	PRG879001	PRG889001	PRG899001
Type	Program	Program	Program
State	 In Progress	 Not Started	 Not Started



4. Ensuring quality using checklists

Use checklists to ensure program quality. A checklist consists of a list of questions that define acceptance criteria. Learn how to use checklists in Quality Project Management.

5. Using the timeline to manage programs

About the program timeline

As a Program Planning stakeholder, program or project manager, or team member, you can use the program timeline to view the entire program, including projects, subprojects, and events, in one convenient graphical timeline. Additionally, as a program manager, you can use the dashboard to add or modify programs, projects, and events.

Tip:



- To select multiple events, hold the **Ctrl** key as you select them.
- To zoom in and out of the program timeline, hold the **Ctrl** key and scroll using your trackpad or mouse.

I want to:	
Show a selected program object's details in a summary view below the timeline.	View deliverable dependencies from the timeline.
Create projects and subprojects from a template within an active program.	Modify program properties directly from the timeline.
Go directly to a specified date on the program timeline.	Manage resource assignments for an event.
Change the program timeline view.	Search for an event or deliverable instance.
Filter the program timeline.	Set the event color on the timeline.
Change the timeline zoom level.	Quickly add or delete projects, subprojects, and events.
Display event information directly on the timeline.	Arrange the columns in the program timeline.
Shift an event date along with any dependent secondary events.	View schedule milestones on the program timeline.
Manage event dependencies from the timeline.	

Other actions you can perform from the program timeline

You can also perform other actions from the timeline, such as rearranging the program hierarchy, opening an object, or changing the planned date for events.




Rearrange the program hierarchy

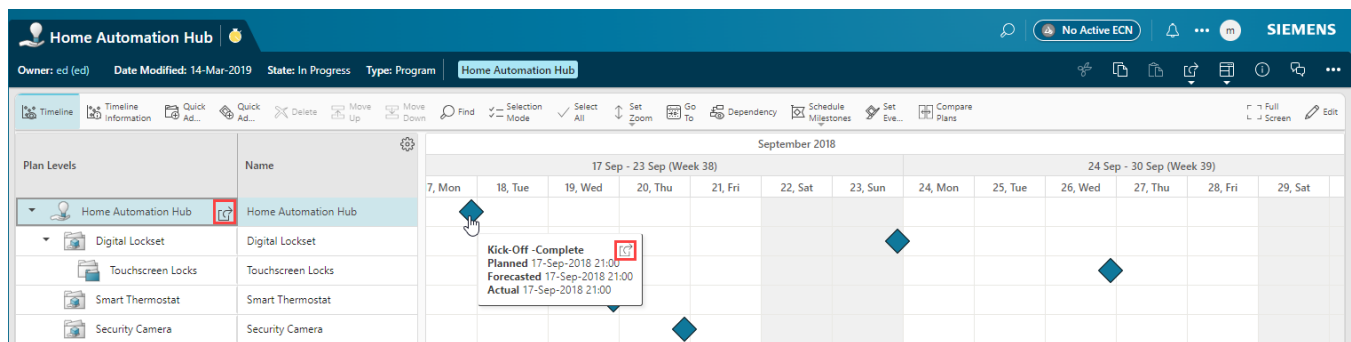
If you want to rearrange your program hierarchy, select the project or subproject you want to move up or down. Next, click **Move Up**  to move the selection up in the hierarchy, or click **Move Down**  to move it down.

Note:

If your project or subproject contains child plan levels, you can only move the child plan up or down within the parent plan hierarchy. You cannot move the child plan to a different parent plan or move it out of its parent.

Open a program object from the timeline

To open a project, subproject, or event, hover over the object on the timeline and select **Open** . For events, the **Open**  icon is displayed inside the tooltip. For projects and subprojects, the **Open**  icon is displayed next to the plan level when the object line is selected.




Change plan date for events on the program timeline

You can drag an event to different locations on the program timeline to change the planned date. This allows you to quickly replan events without having to change the dates from within each event.

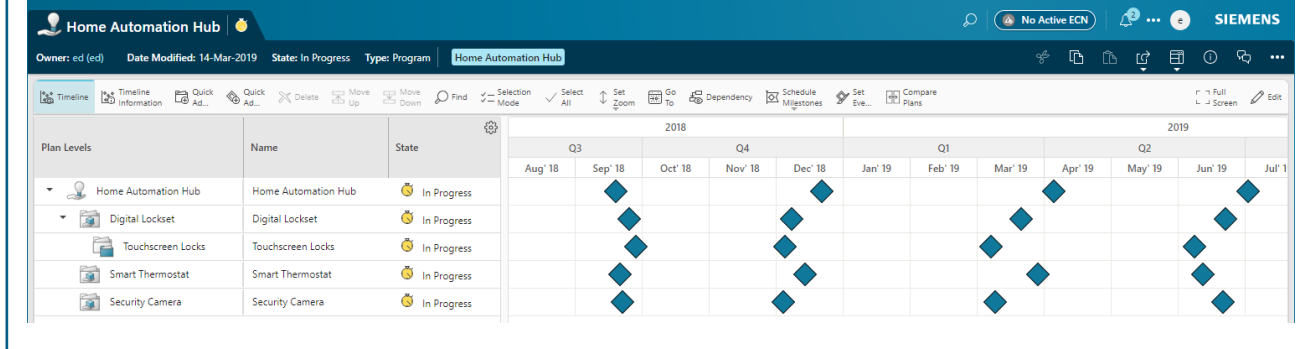
View the program timeline

You can use the program timeline to view programs, projects, subprojects, and events in a timeline format. You can choose to **view the timeline in days, weeks, or months**, and **display program object details below the timeline**.

1. Search for the program using the search box or navigate to the program in your folder structure.
2. (Optional) Filter the list to quickly find the desired program.
3. Select a program from the list and click **Open** .

Note:

Your timeline may look different from the one displayed here. Your system administrator can assign specific colors to each event defined in the **Event Code** list.



Create new projects and subprojects from a template within an active program

You can create new projects and subprojects from a template when adding new plan levels to an active program on the program timeline. All your available templates are displayed when adding the plan levels.

1. From the program timeline, select the program, project, or subproject you want to add the additional plan level to and then click **More Commands** **...** > **New** > **Add Plan Level** .

The **Add Plan Level** panel opens.

2. In the **Add Plan Level** panel, click the **Search** tab and enter your search criteria.
3. Click the desired template and click **Add a Copy**.
4. In the **Add a Copy** section of the panel, change the properties as needed or use the values specified in the template.


You can select the **Include Checklists** and **Include Deliverables** check boxes to include any checklists and deliverables from the template in the new plan level.

5. Click **Add**.

The new plan level is added to the program timeline as a child of the program, project, or subproject you selected in step 1.

Go directly to a date on the program timeline

You can navigate to a specified date for a program from the program timeline when you know the exact date you want to view. Once you have finished, you can quickly return to the current date on the timeline.

1. From the program **Timeline**, click **Go To** .
2. Click in the **Date** box to open a calendar.
3. Do one of the following to specify the date:
 - Enter the date into the date box. You must enter the date in DD-MMM-YYYY format. For example, to select the date of June 8th, you enter **08-Jun-2021**.
 - Use the calendar to select the date you want to view.
4. Click **Go**.


The program timeline scrolls to the specified date.

5. (Optional) To return to the current date, click **Go To**  and then select **Today** to return the program timeline to the current date.

Change the program timeline view


You can change the program timeline view to show different levels of information on the screen. For example, you can display program object details in the work area, or show and hide the timeline that appears to the right of the Tree. This allows you to efficiently manage what you are viewing when working on your programs.

Show or hide the program timeline

1. Click **Timeline**  to show or hide the timeline that displays to the right of the tree.

Show details in the work area

You can show the selected program object's details in the work area below the program timeline. When the details are displayed, you can select the different tabs across the top to view additional information, such as deliverables, schedules, risks, and opportunities.

1. Click **Layout Manager**  and select a layout to display details in the work area.

- Select from the different tabs to view the corresponding details. In addition to viewing the details, you can also perform actions directly from the work area summary, such as **adding a deliverable to a program or event**, or **creating a program risk, issue, or opportunity**.

The screenshot shows the Siemens Teamcenter interface for a program named 'Home Automation Hub'. The top navigation bar includes 'Home Automation Hub', 'No Active ECN', and 'SIEMENS'. Below the navigation bar, there is a toolbar with various icons for actions like 'Timeline', 'Information', 'Quick Ad...', 'Delete', 'Move Up', 'Move Down', 'Find', 'Selection Mode', 'Select All', 'Set Zoom', 'Go To', 'Dependency', 'Schedule Milestones', 'Set Ev...', and 'Compare Plans'. The main area is divided into two sections: a 'Plan Levels' table and a 'Timeline' Gantt chart.

Plan Levels Table:

Plan Levels	Name	State
Home Automation Hub	Home Automation Hub	In Progress
Digital Lockset	Digital Lockset	In Progress
Touchscreen Locks	Touchscreen Locks	In Progress
Smart Thermostat	Smart Thermostat	In Progress
Security Camera	Security Camera	In Progress

Timeline Gantt Chart:

The timeline shows a Gantt chart for the year 2018 and 2019. The x-axis is divided into quarters: Q3 (Sep 18, Oct 18, Nov 18, Dec 18), Q1 (Jan 19, Feb 19, Mar 19), and Q2 (Apr 19, May 19, Jun 19). Blue diamonds represent tasks or milestones, with some overlapping across quarters.

Program Details Panel:

Overview | Campaigns | Business Case | Governance | Events | Changes | Deliverables | Schedules | Risks | Issues | Opportunities | Assignment Matrices | Rules of Credits | Attachments | References

Properties:

- Name: Home Automation Hub
- Description: Next gen home automation system
- Date Released:
- Maturity:
- Plan ID: PRG879001
- Type: Program
- State: In Progress

Projects Table:

Object	Type	Plan ID	State	Status
Digital Lockset	Project	PRJ879003	In Progress	
Security Camera	Project	PRJ879002	In Progress	
Smart Thermostat	Project	PRJ879001	In Progress	

Apply filters to the program timeline

You can apply filters to a program from the program timeline to personalize the view to your preferences or business process. Filters can be applied by clicking a column header in the timeline and then entering your filter criteria.

- Click one of the column headers at the top of the timeline to see the filtering options for the column.
- Do any of the following as necessary:
 - Specify the filter criteria.

Note:

See the *Filtering data in a table column* topic in the *Active Workspace Fundamentals* for more information on filtering data in a table column.

- Click **Freeze** to prevent a table column from being resized. You can click it again to allow resizing for the column.
- Click **Hide Column** to hide it from the view. If you need to see the column again, it can be added back to the table from the **Arrange** panel.

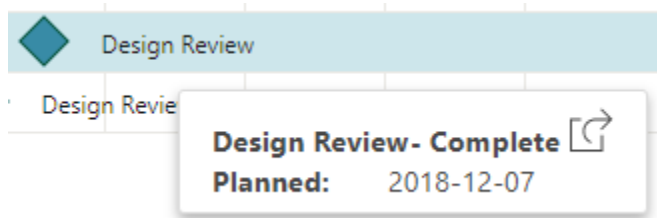
- Click **Clear** to remove the applied filters from a column.
 - Click **Contains** to view the list of values you want to filter by.
3. Click **Filter** to apply the filter to the column.


View event information in the timeline

View event information

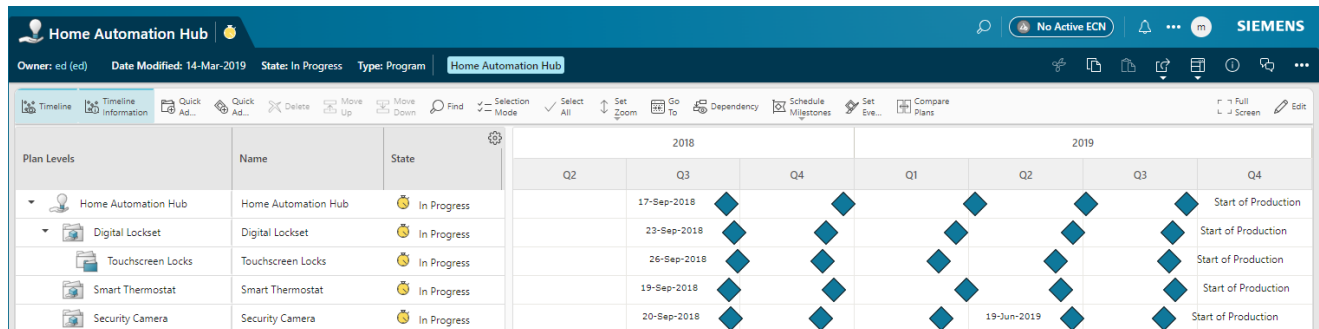
You can access event information from the timeline in multiple ways:

- Hover over an event in the program timeline to see its name, status, and planned date.



- Click **Timeline Information**  to toggle the display of event information.

If you are in the **Day** view, the event name is displayed in the timeline. If you are in the **Weeks** or **Months** view, the event name and planned date are displayed.



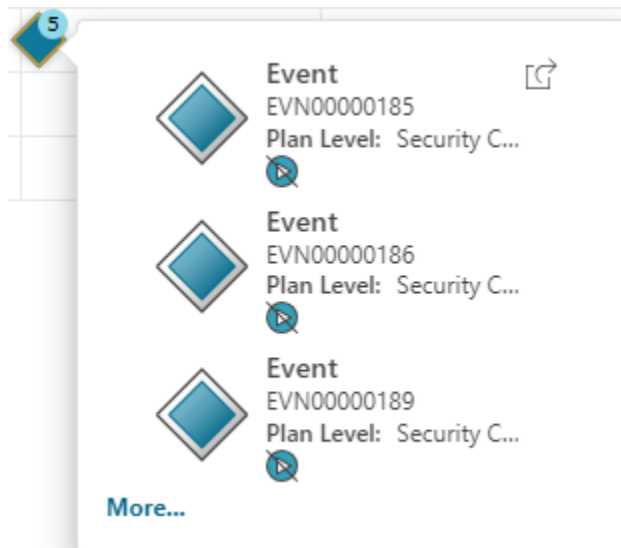
Note:


For larger programs, Active Workspace may hide some of the event information to prevent overlapping of text on the program timeline.

- Select a layout from the **Layout Manager**  to display details below the timeline, such as the associated events and **their dependencies**, risks, issues, and opportunities.


Stacked events on the program timeline

For larger programs, you may have multiple overlapping events displayed on the program timeline. In this situation, the event icon on the timeline displays the number of overlapping events. When you select the event on the timeline, the first three events are displayed.



If you need to see more than three of the events, click the **More** link to open the **Objects** panel and view all overlapping events. Select a layout from the **Layout Manager**  to display information below the timeline when selecting an event from the timeline or **Objects** panel.

Tip:

You can click **Open**  next to an event on the program timeline or the **Objects** panel to open the event's details in a full screen view.

When the event icon on the timeline shows stacked events is based on the hours between the events and the zoom level of the timeline. Refer to the table below for more details.

Zoom Level	Hours between overlapping events
Days	3 hours or less between two adjacent events
Weeks	12 hours or less between two adjacent events
Months	48 hours or less between two adjacent events
Quarters	200 hours or less between two adjacent events
Years	360 hours or less between two adjacent events

Configure what event information displays on the program timeline

Your administrator can configure the **PP_Event_Information** and **PP_Event_Tooltip_Information** preferences to control event information displayed on the program timeline.

Note:

- The **Event Name**, **Event Code**, **Event State** and **Open** icon are fixed values and are always displayed for an event.
- By default, the first three values specified for the preference are displayed when hovering over the event on the timeline.

Set the event color on the program timeline



When viewing events on the timeline, you can choose to set the event color based on the state of the event. This allows you to see the progress of your events quickly, without having to hover over the event to see its state.

The default colors for the event states are as follows:

- **Not Started** event icons are blue.
- **In Progress** event icons are yellow.
- **Complete** event icons are green.
- **Closed** event icons are gray.

Note:


Your administrator can modify the **PP_Event_color_coding_configuration** preference to change the default colors for the program events.

1. **View the timeline for a program that contains events.**
2. From the program timeline, click **Set Event Color** .
3. Click **By State** to set the event colors based on the state of the event.
4. To set the events back to their default color, click **Set Event Color**  again and then click **Default Event Color**.

Manage event dependencies on the timeline

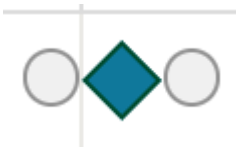
When viewing the timeline for your program, you can create event-to-event dependencies between events in your program, projects, and subprojects. You can also choose to hide or show the dependencies on the timeline, or remove the dependencies if you no longer need them.

Create event-to-event dependencies

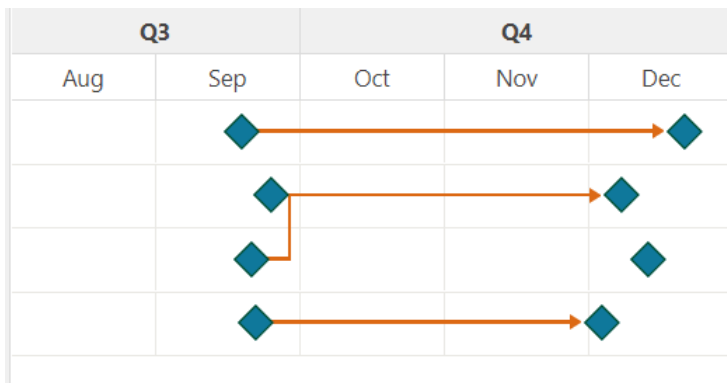
1. **View the program timeline.**
2. Click **Dependency** .

This enables creating and viewing event dependencies on the timeline.


3. Hover over an event to see a connector to the left or right of the icon.




4. Click the connector and then drag to the connector of the event you want to create the dependency with. When you release the mouse button, the dependency between events is created.




Show or hide event dependencies

1. To toggle showing or hiding event dependencies from the timeline, click **Dependency** .

Remove event dependencies

1. Click **Dependency**  to display your event dependencies.
2. Select an event-to-event dependency arrow on the timeline. When you select it, the arrow is highlighted.


3. Do one of the following to delete the dependency:
 - Double-click on the event dependency arrow to remove it.
 - Click **Delete** .
4. Click **Delete** when prompted by Active Workspace to confirm the deletion.

View schedule milestones on the program timeline

If you have a schedule associated with one of your program plan levels, you can view the milestones from that schedule in the program timeline. The milestones are displayed in the timeline along with the events that make up your program. This gives you an overview of the overall schedule execution.


Note:

The schedule milestones are only displayed on the timeline and cannot be edited. If you need to modify a schedule milestone, you must open it to make the necessary changes.

1. Open a program that has an associated schedule that contains milestones.
2. Select the program, project, or subproject that contains the schedule with the milestones you want to display on the timeline.
3. Click **Schedule Milestones**  and then do one of the following:
 - Click **Show** to show the milestones for the selection.
 - Click **Show All** to show all the schedule milestones for all programs, projects, and subprojects in the timeline, regardless of which object is selected.

The schedule milestones display on timeline. You can hover over the milestone to view its high-level information, or click on it to view all the details in the **Summary** below the timeline.

The screenshot shows the Siemens Teamcenter interface for a program named 'Home Automation Hub'. The main view is a Gantt chart timeline from 2018 to 2019. A tooltip for a milestone indicates it is 'Not Started' and 'Planned: 31-Dec-2018'. Below the timeline, the 'Milestone' details are displayed, including planning properties like Name, Description, Schedule, Priority, Duration, Work Effort, Start Date, and Finish Date, as well as execution properties like State, Status, Work Complete, and Remaining Work.

4. Optionally, click **Schedule Milestones**  again and do one of the following to hide the milestones on the timeline.
 - Click **Hide** to hide the milestones for the selected program, project, or subproject.
 - Click **Hide All** to hide all the milestones displayed on the timeline.



Create a dependency between a schedule milestone and a program event

You can create dependencies between a schedule milestone and a program, project, or subproject event on the program timeline.

Note:

You can only create dependencies from past objects to future objects.

Procedure

1. Open a program that has a schedule associated with it.
2. Click **Schedule Milestones**  and select **Show All**.
3. Click **Dependency** .
4. Hover over the target milestone or event.

The connection points appear on either side of the target milestone or event.

- Click and drag the secondary object's connector, and then release it on the primary object's connector.

Move the schedule milestone or program event when a dependency is defined


As a program manager, you can move an event to a new date on the program. When an event is moved to a new date, all secondary milestones are automatically moved by the same number of days as the primary event. The event can move backward and forward in time. However, when dependencies are defined between the milestones and events, the following restrictions apply:



- Events cannot be moved to a date on the timeline that occurs prior to secondary objects.
- Events cannot be moved to a date on the timeline that occurs later than the primary objects.
- Only events for which you have write access will be moved.





Note:

This action can also be performed on the schedule **Gantt**.

Procedure

- Open a program that is associated with a schedule.
- Click **Schedule Milestones**  to show the milestones on the **Timeline**.
- Create a dependency** between the milestones and events.
- Click a milestone or event on the **Timeline** to select it.
- Do one of the following to move the milestone or event to a new date.

To	Do
Move a milestone or event to a new date on the Timeline .	<ul style="list-style-type: none"> Drag the milestone or event to a new date on the Timeline.
Change the date from the Overview tab.	<ol style="list-style-type: none"> From the Overview tab, click Edit . <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note:</p> <p>Select a layout from Layout Manager  to display details</p> </div>

To	Do
	<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">below the Timeline, such as the Overview tab.</div> b. Under Planned , select a new date. c. Click Save  .
Change the date in the Information panel.	a. Click Information  . b. Click Edit  . c. Under Planned , select a new date. d. Click Save  .

Shift an event's planned date along with the planned dates of secondary events

When you are planning your program, you can drag your events to a new date on the program timeline. When you do this, you are asked if you want to automatically move any secondary events by the same number of days as the primary event. This is helpful if you have a large number of events that have dependent secondary events in your plan. You can also adjust the planned date from the **Information Panel** or by clicking **Shift Event** in the primary toolbar.

Shift an event's planned date on the program timeline


1. Select an event from the program timeline and drag it to the new date. If there are any dependent secondary events, you are asked if you want to move the secondary events to a future date.
2. Do one of the following:
 - Click **Move** to move all secondary events by the same number of days as the primary event.

Note:

Only events for which you have write access will be moved.

- Click **Cancel** to keep all secondary events at their current date.


Shift an event's planned date from the Information panel

1. Select the desired event from the program timeline and then click **Information**  from the primary toolbar.

The **Information** panel opens.

2. Click **Edit**.
3. Change the **Planned** date.
4. Click the **Keep Related Objects in sync with Planned Date** check box to move the primary event's related artifacts, such as event criteria, checklists, and deliverables, by the same number of days to keep everything in sync.
5. Click **Save** and then close the **Information** panel.

Shift an event's planned date from the primary toolbar

1. Select the desired event from the program timeline.
2. Click **More Commands ...** > **Edit**  > **Shift Event**.

The **Shift Event** panel opens.

3. Enter the new **Planned Date**.
4. Click the **Shift the secondary events** check box to shift the secondary events by the same number of days as the selected event.
5. Click **Shift** to change the event's planned date.

View deliverable dependencies from the timeline

You can view the program deliverable dependencies from the program object details below the timeline.

1. **Follow the instructions to display program object information below the timeline.**
2. Click the **Deliverables** tab.
3. Expand the **Dependencies** section to view the deliverable or deliverable instance dependencies.



Modify program properties from the timeline

You can quickly modify some program object properties from the timeline by double-clicking the cell you want to update and then changing the information as needed. You can also click **Edit** to enable edit mode, which turns on editing for all cells at once.


The type of data in the cell you are modifying determines how you update the information in the cell. For example, clicking on a date shows the calendar and allows you to pick a new date, while clicking on the status lets you to select a different status from a list.

Note:

If you have **Autosave Tables** enabled in your user properties panel, when you click off a cell that you have modified, it saves automatically. If you do not have this feature enabled, you must manually save any changes you made to any cells by clicking **Save Changes** in the upper right corner of the timeline. If you do not click this and then try to navigate to a different page, you are prompted to save your changes or discard them.

1. From the program timeline, navigate to the cell you want to modify and then do one of the following:
 - Double-click the cell and edit the contents as necessary.
 - Click **Edit** . This puts all cells into edit mode and you can modify them as needed. When you are finished editing, click **Save Edits**  to save your changes.


Note:

If you have **Autosave Tables** enabled but use this method to edit the table, you must manually save your changes by clicking **Save Edits** .

Manage resource assignments for an event

You can manage resources for an event's deliverables, risks, issues, opportunities, and checklists from the program timeline. When you select the event, you can **view the Summary information below the program timeline**, or **Open** the event when you hover over it to view the event properties in a full screen and remove the user from that view.



Manage resource assignments from the Summary view below the program timeline

Select a layout from **Layout Manager**  to display the summary information for a program object below the timeline, and then follow the steps below.

1. Select the event from the program timeline.


The event information is displayed below the timeline

2. Select the appropriate tab (**Deliverables**, **Checklists**, **Risks**, **Issues**, and **Opportunities**) that contains the object you want to manage.
3. Select the event object.


4. Click **Resource Assignment**  and then choose one of the following:
 - Click **Assign Resource**  to open the **Assign Resource** panel. Choose a user or assign the object to a group of users in your organization.

Tip:



If you have a large number of users, you can filter the list by **Group, Role, and Project**. If you know the exact user or resource pool you are looking for, you can type the name into the **Filter** box.

- Click **Remove User**  to remove the assigned user from the selected object.

Manage resource assignments by opening the event from the program timeline



1. Hover over an event on the program timeline and then click **Open** .

The event opens in a full screen to the **Overview** tab.

2. Select the appropriate tab (**Deliverables, Checklists, Risks, Issues, and Opportunities**) that contains the object you want to manage.
3. Select the event object.
4. In the upper right corner of the table, click **Resource Assignment**  and then choose one of the following:
 - Click **Assign Resource**  to open the **Assign Resource** panel. Choose a user or assign the object to a group of users in your organization.

Tip:

If you have a large number of users, you can filter the list by **Group, Role, and Project**. If you know the exact user or resource pool you are looking for, you can type the name into the **Filter** box.


- Click **Remove User**  to remove the assigned user from the selected object.
5. When you are finished managing the object, click **Previous Location**  to return to the program timeline.

Search for events and deliverable instances


You can search for events or deliverable instances on the program timeline to quickly find the desired object on the program timeline. This can help you more easily find events and deliverable instances in larger programs.

Tip:

You can enter a wildcard * and partial text into the search box if you don't know the exact name of the event or deliverable instance you are looking for. For example, if you wanted to search for a build event, but didn't know the exact name, you can enter **build*** to return all events that contain the word **build** in the event name.

1. From the program timeline, click **Find** .

The **Find** panel displays.

2. In the **By:** section, select the type of object you want to search for. You can select either **Event** or **Deliverable Instance**.
3. In the **Search** box, enter the criteria you want to search for and then click **Find** .

All matching results display in the **Results** section of the panel.

4. Select the event or deliverable instance you want to view.

The program timeline scrolls to the selected object and highlights it.


Change the timeline zoom level

You can change the zoom level on the timeline view to see a shorter or longer time period. By default, the timeline shows the unit of time in months.

Note:

The **AWC_Timeline_Zoom_Level** user preference preserves the last zoom level used on the timeline when you navigate away to a different page or log out. In order for this preference to activate, your system administrator must change the zoom level at least once while viewing the program timeline.

Set zoom level from the work area toolbar

1. Click **Set Zoom**  to view the different zoom levels.
2. Choose a zoom level. You can zoom by **Days**, **Weeks**, **Months**, **Quarters**, **Years**, and **Unit of Time Measure**.

Note:

The **Unit of Time Measure** is the default zoom level **set in the program properties**.

Set zoom level using your mouse

1. Hover over the top area of the timeline view.

A magnifying glass cursor will appear.


2018				
Q3		Q4		
Aug' 18	Sep' 18	Oct' 18	Nov' 18	Dec' 18
	◆			◆
	◆			◆
	◆		◆	
	◆			◆

2. Click to change the zoom level. Each time you click, the date range changes.



Add or delete plan levels and events from the timeline

You can quickly add or delete a project, subproject, or event directly from the program timeline.


Add plan levels

1. Select the appropriate program object from the timeline. When you select a program, adding a new plan level adds a project. When you select a project, adding a new plan level adds a subproject.
2. From the program timeline, click **Quick Add Plan** .

The object is added to the timeline.

3. (Optional) Select the object and then do any of the following to change the program object information:
 - Click **Information**  to view and edit the properties.
 - Click **Open**  to view and edit all the properties.

Add an event

1. Select a program, project, or subproject from the timeline.
2. Click **Quick Add Event** .

The event is added to the selected object with the current date as the planned date.

3. (Optional) Select the event and then do any of the following to change the information:
 - Click **Information** ⓘ to view and edit the event properties.
 - Click **Open** ↗ to view and edit all the event properties.
 - If you created multiple new events, these events overlap one another. You can drag the events to a different location on the timeline to re-plan the program.

Delete a project, subproject, and event




1. Select a program, project, or subproject from the timeline.
2. Click **Delete** ✕.
3. Click **Delete** when prompted to confirm the deletion.

Customize the program timeline columns

You can customize the columns displayed in program timeline by hiding columns (except the **Name** column) or rearranging the column order.

1. Click the **Table Settings** ⚙ icon in the program timeline column headings and select **Arrange**.
2. In the **Arrange** panel, do one of the following.

To	Do
Hide a column.	Select the column you want to hide from the Displayed Columns section of the panel and then click Remove < to hide it. <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Note: You cannot hide the Name column.</p> </div>
Reset the columns to the default layout.	Click Reset ↺.
Save and load a column arrangement	When creating a custom arrangement, select the Save as new arrangement check box to enter a name for the view. When you click Save and Arrange to apply the view, the custom column configuration

To	Do
Rearrange the column order.	is saved. When you want to load it again, click Column Arrangements  and then select the saved arrangement from the list. a. Select a column name from the list. b. Click either Move up  or Move down  .



3. Click **Arrange**.



6. Defining the plan

Creating and managing programs


Create an ad hoc program

As a program manager, you may want to create a program that is not based on a program template. Use this process to create an entirely new program. The new program is placed in your **Home** folder.

1. From the **Explorer** location, navigate to the **Home** folder.
2. Click **More Commands** **...** > **New**  > **Add** .
3. In the **Add** panel, do one of the following.

To	Do
Search for a program.	<ol style="list-style-type: none">a. Click the Search tab.b. Enter the search criteria and click .
Select a program that was previously copied to the paste buffer using Copy  .	<ol style="list-style-type: none">a. Click the Palette tab.b. Select a program from the Clipboard section.
Select a favorite or recently viewed program.	<ol style="list-style-type: none">a. Click the Palette tab.b. Select a program from the Favorites or Recent section.
Add a new program.	<ol style="list-style-type: none">a. Click the New tab.b. Specify Program as the Type.c. Enter the properties for the new program.

Tip:

If you want to add multiple programs with the same or similar values, click **Pin Panel**  to keep the **Add** panel open as you create the programs.

4. Click **Add**.

Note:

If program management security is turned on, you must sign off Active Workspace and sign back in to access the new program.

Create a new program from an existing program or from a template

If the programs within your organization are similar, as a program manager you may want to create a new plan from an existing plan. When you save a program as a new program, all projects, subprojects, and their respective events are saved in the new plan. This can save considerable time, especially if your organization uses complex programs.

Note:




If you are saving a new plan from a plan that is a template (the **Template** field on the **Overview** tab is set to **True**), you have the option of including the program deliverables associated with the template and adding checklists. If you are saving a new plan from a plan that is not a template, you do not see those options in the **Save As** panel.

Your administrator can also configure the **Save As** panel to do the following:

- Display only specific properties or set certain fields as mandatory.
- Include plan levels, such as projects and subprojects.
- Include program, project, and subproject contents, such as events, risks, criteria, issues, opportunities, schedules, and changes.
- Enable selection of which program contents to copy when saving from a template.

Note:

If the existing program you are saving as a new program contains attached schedules, the schedules are not carried over to the new program.

1. Navigate and open the program from which you want to create the new program.
2. Click **More Commands**  > **New**  > **Save As** .
3. In the **Save As** panel, complete the program fields.
4. (Optional) To include the program's deliverables (including deliverable instances and attachments) in this new program, select **Include Deliverables**.

The program must be a template to see this field.

- (Optional) To include the program's checklists (including checklist questions) in this new program, select **Include Checklists**.

The program must be a template to see this field.

- Click **Save** to create the new program.

Modify the program properties


As work proceeds on a program, the program manager can manually update program properties to reflect the current program state. You can update properties on a single program, multiple programs, or on the Information panel.

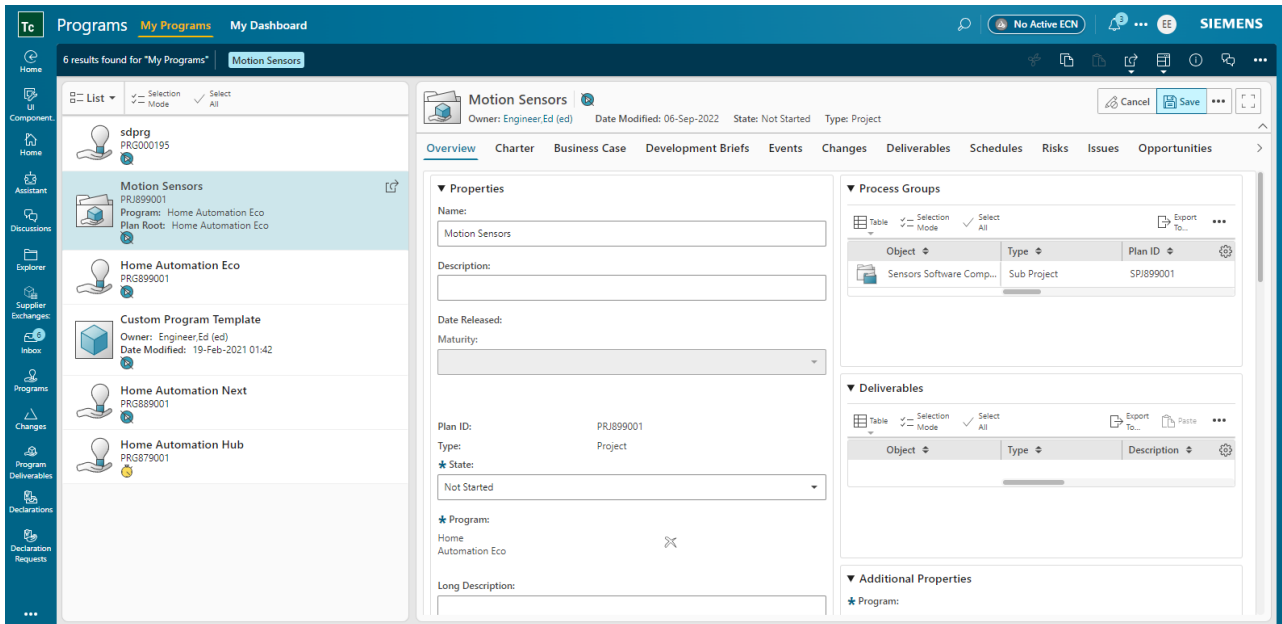
Note:

You can define a program's default unit of the measure from the **Overview** tab when modifying the program properties. The unit of time is used when viewing the program on the timeline and when selecting the timeline zoom level of **Unit of Time Measure**. You can set the **Unit of Time Measure** to **Days, Weeks, Months, Quarters, or Years**.

Update properties on a single program

You can update properties on a single program in the folder structure or from the **program timeline**.

- Select the desired program from the list.
- Click **Edit** .
- Edit the program's properties.



4. Click **Save** .

Update properties on multiple programs

This display method enables you to update properties directly within the table. It's a convenient method to use to update properties on more than one program.





















1. Select the **Table**  display method.
2. Using multiselect mode, select the programs from the list.
3. Click **Edit** .
4. Edit program properties in the table.

Table 		Selection Mode <input checked="" type="checkbox"/>	Select All <input checked="" type="checkbox"/>	Save Edits 	Cancel Edits 
Plan Levels	Description	State	Type		
 sdprg	sdprg	 Not Started	Program		
 Motion Sensors		 Not Started	Project		
 Home Automation Eco		 Not Started	Program		
 Custom Program Template	Custom Program Template	 Not Started	Custom Program		
 Home Automation Next	Next Gen Home Automation Solution...	 Not Started	Program		
 Home Automation Hub	Next gen home automation system	 In Progress	Program		

- Click **Save Edits** .

Update program properties in the Information panel


You can access the **Information** panel from within any display.



- Select the desired program.
- Click **Information** .
- Click **Edit** .
- Edit the program properties.
- Click **Save** .

Field definitions for program properties

Program managers can modify the program's **Properties** values after the program is created.

Field name	Definition	Valid values
Name	Uniquely identifies this program.	
Description	Describes this program (short description).	
Plan ID	Specifies a unique ID for this object (program). This value is automatically generated when the program is created, although it can be modified prior to saving the program.	This value cannot be modified once the program has been created.
Type	Identifies the object type, which is Program .	
State	Reflects the current state of the program.	The out-of-the-box values are:

-  **Not Started**
-  **In Progress**
-  **Complete**
-  **Closed**


Field name	Definition	Valid values
Long Description	Describes this program (long description).	
Owner	Identifies the owner of this object (program).	Use Change Owner  to modify this value.
Group ID	Identifies the assigned classification of this object (program).	Use Change Owner  to modify this value.
Classification	A configurable list of values used to label a program, project, or subproject. For example, an organization could classify a program's significance to the organization (high, medium, low) or program's complexity (complex, moderate, simple).	There are no out-of-the-box values defined for this list.
Market	Indicates the target market of the product to be enhanced or delivered as a result of the program.	
Customer	Identifies the customer that is requesting the products to be enhanced or delivered as a result of the program.	
Template	Indicates the object is a template. The program manager can create a program and save it (with its events and program deliverables) as a template for reuse. When a program is created (using Save As) from a program template, it includes the program events, program deliverables, and checklists (if the user selects Include Program Deliverables and Include Checklists when creating the new program).	True or False.
Based On	Displays the template used to create the program, project, or subproject. You can click the link to view the template.	

Field name	Definition	Valid values
Published	Determines if the program is accessible to users other than the owner.	True or False.
Content Security	<p>Determines if program content (deliverables, deliverable instances, changes, schedules, events, event criteria, risks, issues, and opportunities) is automatically added to the program's Teamcenter project security folder or is open for access by everyone.</p> <p>Your system administrator can configure the Program_Management_Security site preference to define Program Planning security.</p>	True or False.

Creating, managing, and assigning projects and subprojects



Add a project to a program

As the program manager, you can add one or more projects to a program. A project is an investment-oriented decomposition of the program to which it is assigned and may have an end-product orientation.


1. Select a program and click **Open** .
2. Select the program on the timeline table (or do not select anything from the timeline table).

Note:

If you select an existing project on the timeline list and add a plan level, you add a subproject to the selected project.

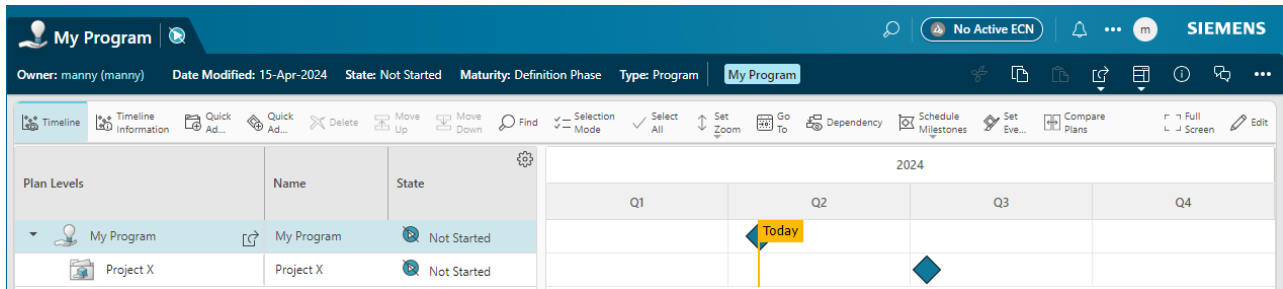
3. Click **More Commands ...** > **New**  > **Add Plan Level** .
4. In the **Add Plan Level** panel, specify the **Type** and enter the project properties.

Tip:

If you want to add multiple projects with the same or similar values, click **Pin Panel**  to keep the **Add Plan Level** panel open as you create the projects.

5. Click **Add**.

The new project appears on the timeline.






Create a new project from an existing project

As the program manager, you can create a new project from an existing project within a program.

Note:

When creating a project from a project template, you have the option of including the template's deliverables and checklists in the new project.

1. Select a program and click **Open** .
2. Select a project from the timeline list and click **More Commands** **...** > **New**  > **Save As** .
3. In the **Save As** panel, enter the project properties.
4. (Optional) To create the new project in a different program, select the desired program in **Target Plan Level**.

Note:

If your administrator has configured **Teamcenter project security**, the new project will be assigned to the same Teamcenter Tc_project as the parent program.

5. (Optional) To include the program's checklists (including checklist questions) in this new project, select **Include Checklists**.

The project must be a template to see this field.




6. (Optional) To include the program's deliverables (including deliverable instances and attachments) in this new project, select **Include Deliverables**.

The project must be a template to see this field.

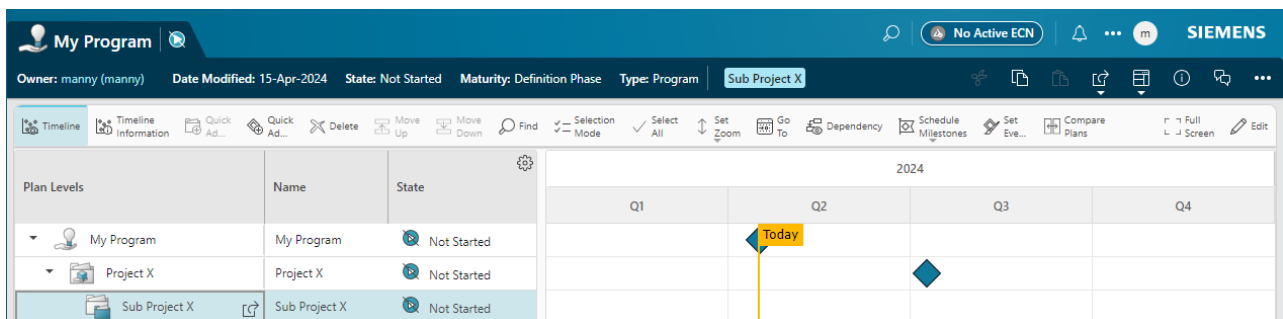
7. Click **Save**.

Add a subproject to a project

As the program manager, you can add one or more subprojects to a project.

1. Select a program and click **Open** .
2. Select a project from the timeline list and click **More Commands** **...** > **New**  > **Add Plan Level** .
3. In the **Add Plan Level** panel, specify the **Type** and enter the subproject properties.
4. Click **Add**.

The subproject appears beneath the master project in the timeline.







Delete a project from a program or a subproject from a project

As the program manager, you can delete a project from a program if the project does not have associated events, subprojects, changes, deliverables, or schedules. You can also delete a subproject from a project if the subproject does not have associated events, changes, deliverables, or schedules.

Note:

This action deletes the project or subproject from Teamcenter.


1. Select a program that has the associated project or subproject and click **Open** .
2. Select the project or subproject that you want to delete.
3. Delete the project or subproject in one of these ways:
 - Click **Delete** .
 - Click **More Commands** **...** > **Edit**  > **Delete** .
4. Click **Delete** on the message that appears.

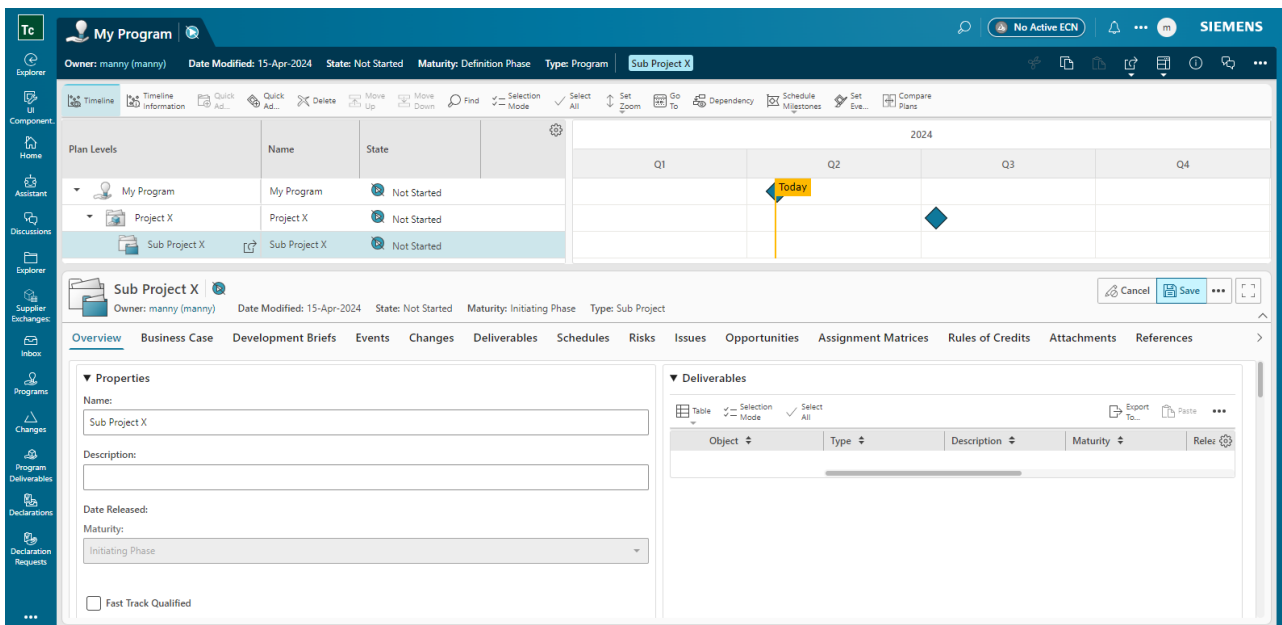
Modify the project and subproject properties


As work proceeds on a project, the project manager can manually update the project or subproject properties to reflect the current project state. You can update properties on a single project, multiple projects, or on the Information panel.

Update properties on a single project or subproject

You can update properties on a single project in the folder structure or from the **program timeline**.

1. Select the desired project from the list.
2. Click **Edit** .
3. Edit the project's properties.





4. Click **Save** .

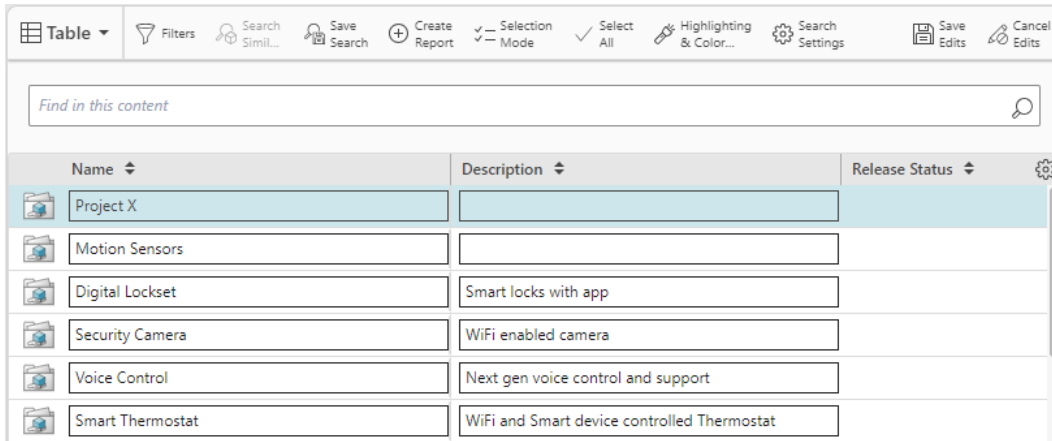
Update properties on multiple projects or subprojects

This display method enables you to update properties directly within the table. It's a convenient method to use to update properties on more than one project or subproject.

Note:

You can also **update properties on multiple projects or subprojects from the program timeline**.

1. Select the **Table**  display method.
2. Using multiselect mode, select the projects from the list.
3. Click **Edit** .
4. Edit project or subproject properties in the table.






Name	Description	Release Status
Project X		
Motion Sensors		
Digital Lockset	Smart locks with app	
Security Camera	WiFi enabled camera	
Voice Control	Next gen voice control and support	
Smart Thermostat	WiFi and Smart device controlled Thermostat	

5. Click **Save Edits** .



Update project or subproject properties in the Information panel

You can access the **Information** panel from within any display method.

1. Select the desired project or subproject.
2. Click **Information** .
3. Click **Edit** .
4. Edit the project or subproject properties.
5. Click **Save** .

Field definitions for project and subproject properties

Program managers or project managers can modify the project's **Properties** values after the project is created.

Field name	Definition	Valid values
Name	Uniquely identifies this project.	
Description	Describes this project (short description).	
Plan ID	Specifies a unique ID for this object (project or subproject). This value is automatically generated when the project is created, although it can be modified prior to saving the project.	This value cannot be modified once the project has been created.
Target Program ID	Identifies which program, by program ID and program name, a new project is being created under. This field is displayed when using Save As on a program timeline to create a new project.	Select from a list of valid programs.
Type	Identifies the object type, which is Project or Sub Project .	
State	Reflects the current status of the project or subproject.	The out-of-the-box values are: Not Started In Progress Complete Closed
Program	Identifies which program this project belongs to. Applies only to projects.	This value cannot be modified.
Long Description	Describes this project or subproject (long description).	
Owner	Identifies the owner of this object (project).	Use Change Owner  to modify this value.
Group ID	Identifies the assigned classification of this object.	Use Change Owner  to modify this value.
Classification	A configurable list of values used to label a program, project, or subproject. For example, an organization could classify a	There are no out-of-the-box values defined for this list.

Field name	Definition	Valid values
	project's significance to the organization (high, medium, low) or project's complexity (complex, moderate, simple).	
Market	Indicates the target market of the product to be enhanced or delivered as a result of the project or subproject.	
Customer	Identifies the customer that is requesting the products to be enhanced or delivered as a result of the project or subproject	
Date Released	Identifies the date that this project was released within the workflow process.	
Template	Indicates if the object is a template. The program manager can create a project or subproject and save it (with its events) as a template for reuse	
Published	Determines if the project, or subproject is accessible to users other than the owner.	True or False.
Project (project-level security)	Associates this project or subproject to a security-level project. The project consists of entities that correlate groups of users with the data associated with a given project or subset of a project. Project-level security is defined by your system administrator. Projects or subprojects that are not associated with a security-level project are open for access by everyone.	
Content Security	Determines if program content (deliverables, deliverable instances, changes, schedules, events, event criteria, risks, issues, and opportunities) is automatically added to the program's Teamcenter project security folder or is open for access by everyone. Your system administrator can configure the Program_Management_Security site	True or False.

Field name	Definition	Valid values
	preference to define Program Planning security .	
Prime Event Date	The date the target (Save As) project begins, which is used to determine the dates of the project events in the target project. All subsequent events in the target project will reflect the same cadence as the events in the source project. For example, if the source project has three events occurring on September 16, 2018, September 18, 2018 and September 28, 2018 and the Prime Event Date for the target project is December 1, 2018, the three events for the target project will be December 1, 2018, December 3, 2018, and December 13, 2018.	
Template	Indicates the object is a template. The program manager can create a project and save it (with its program deliverables) as a template for reuse. When a project is created (using Save As) from a project template, it includes the project attachments, deliverable instances, and checklists (if the user selects Include Program Deliverables and Include Checklists when creating the new project).	True or False.

Defining and managing events

Define events

Add or delete an event within a program, project, or subproject

As the program manager, you can add events to, or delete events from, a program, project, or subproject. Events represent inflection points in the life cycle of the program, project, or subproject.

Example:

- Executive Approval
- Program Launch

- Build Events
- Contract Signoff
- Start Regular Production

Note:



The delete action deletes the event from Teamcenter.

Add an event to a program, project, or subproject


An event can also be added to a program from the program's **Event** tab.

Note:

If your administrator has configured **Teamcenter project security**, the event will be assigned to the same Teamcenter Tc_project as the parent program.

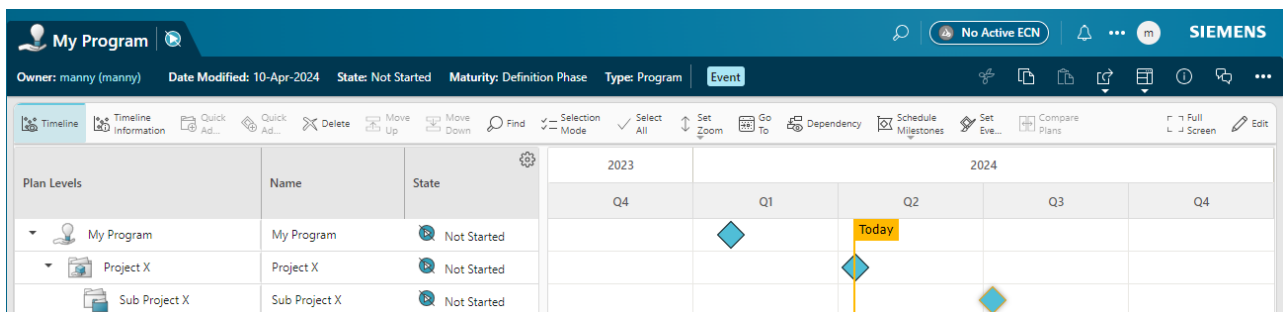
1. Select the program, project, or subproject from the timeline list.
2. Click **More Commands** **...** > **New**  > **Add Event** .
3. In the **Add Event** panel, specify a **Type** and enter the event properties.

Tip:

If you want to add multiple events with the same or similar values, click **Pin Panel**  to keep the **Add Event** panel open as you create the events.

4. Click **Add**.

The event is created and displayed on the program timeline. If the event's planned date is beyond the date range shown on your timeline, Active Workspace automatically scrolls the timeline to the event and highlights it.



Delete an event from a program, project, or subproject

Events for a project or subproject can be deleted from the program's timeline or from within the project or subproject's timeline.

1. Select an event on the timeline, or enter multiselect mode to select multiple events.
2. Delete the event in one of these ways:
 - Click **Delete** ✕.
 - Click **More Commands** ... > **Edit** ✎ > **Delete** ✕.
3. Click **Delete** on the message that appears.

If you selected multiple events and any of those events have a **State** value other than **Not Started**, click **Yes** to delete the selected events.

Modify event properties

As work proceeds, the program manager can manually update event properties to reflect the current event state. You can update properties on a single event, multiple events, or on the Information panel.

Update properties on a single event

You can update properties on a single event in the folder structure or from the **program timeline**.

1. Select the desired event from the list.
2. Click **Edit** ✎.
3. Edit the event properties.

The screenshot shows the Siemens Teamcenter interface with the 'Event' properties dialog box open. The dialog is titled 'Event' and shows the following details:

- Name:** Event
- Description:** (empty field)
- Event ID:** EVN00000202
- Type:** Event
- State:** Not Started
- Plan Level:** Sub Project X

The 'Additional Properties' section includes:

- IMP Element ID:** (empty field)
- Plan Level:** Sub Project X
- WBS Root:** (empty field)
- Milestone Breakdown Scheme:** Event, Accomplishment, Criteria

Note:

If you want Active Workspace to update the planned date for the event artifacts, such as deliverables, checklists, risks, issues, and opportunities when the planned date of the event changes, click **Keep Related Objects in sync with Planned Date**. For example, if a month after you enable this option, you move the planned date of the event forward by 5 days, all your event artifacts will also automatically move their dates forward by the same number of days. If you do not have this enabled, the dates for your artifacts will not automatically change if you updated the planned date of the event.


1. Click **Save** .

Update properties on multiple events

This display method enables you to update properties directly within the table. It's a convenient method to use to update properties on more than one event.

Note:



You can also update multiple event properties on the **Events** tab from the **program timeline**.

1. Select the **Table** display method.
2. Using multiselect mode, select the projects from the list.
3. Click **Edit** .
4. Edit event properties in the table.

5. Click **Save Edits** .


Update event properties in the Information panel

You can access the **Information** panel from within any display method.

1. Select an event from the list.
2. Click **Information** .
3. Click **Edit** .
4. Edit the event properties.




Note:

Click the **Keep Related Objects in sync with Planned Date** check box to move the primary event's related artifacts, such as checklists and deliverables, by same number of days to keep everything in sync.

5. Click **Save** .

Create a new event from an existing event using Save As

You can create a new event from an existing one that carries over the event information, deliverables, and checklists to the new event. This helps you save time as you populate your program with events.

1. **View the program timeline** for the program that contains the existing event.
2. Select the event and click **More Commands**  > **New**  > **Save As** .
3. In the **Save As** panel, enter the event properties.
4. (Optional) To create the new event in a different program, select the desired program in **Target Plan Level**.
5. (Optional) To include the checklists (including checklist questions) in this new event, select **Include Checklists**.
6. (Optional) To include the deliverables (including deliverable instances and attachments) in this new event, select **Include Deliverables**.
7. Click **Save**.

The new event is created and added to your program timeline.

Create a new event based on an existing event

You can create a new event based on an existing event when adding a new event to a plan level. When adding the new event, you can search for the existing event to base it on, or select it from your recently viewed, copied, and favorited events.

1. **View the program timeline** for the program and then select the plan level you want to add the new event to.
2. Click **More Commands** **>** **New** **>** **Add Event**.

The **Add Event** panel opens.

3. Do one of the following to select an existing event.
 - a. To select the event from the **Palette** tab, do one of the following:
 - If you recently copied the event, select it from the **CLIPBOARD** section.
 - If you added the event to your favorites, select it from the **FAVORITES** section.
 - If you recently viewed the event, select it from the **RECENT** section.
 - b. To search for the event, click the **Search** tab and enter your search criteria.

Next, select the event from the search **Results**.

4. Click **Add a Copy**.

The copy of the event is added to the **EVENT** section of the **Add Event** panel.

5. In the **PROPERTIES** section of the panel, specify a new **Planned** date. The other fields are populated based on the information from the event you selected the new event to be based on, but you can change them if necessary.

Note:



The **Target Plan Level** cannot be changed as it is based on the plan level you selected in step 1.

6. If you want to include the checklists and deliverables from the based on event, click the **Include Checklist** and **Include Deliverables** checkboxes.
7. Click **Add** to add the new event to the program timeline.

Add plan events based on an existing plan

You can select an existing plan and add the events to a new plan level. You can search for the existing plan that the new plan will be based on, or select it from your recently viewed, copied, and favorited plans.

Procedure

1. **View the program timeline** for the program and then select the plan level you want to add plan events to.
2. Click **More Commands** **...** > **Manage**  > **Add Plan Events** .
3. In the **Add Plan Events** panel, do one of the following to select the plan event.
 - Select the event from the **Palette** tab in one of these ways:
 - If you recently copied the event, select it from the **CLIPBOARD** section.
 - If you added the event to your favorites, select it from the **FAVORITES** section.
 - If you recently viewed the event, select it from the **RECENT** section.
 - Search for the event, click the **Search** tab and enter your search criteria.
Select the plan from the search **Results**.
4. Click **Add a Copy**.

The plan is added to the **Add A Copy** section of the **Add Plan Events** panel.

5. Specify a date for the **Prime Event Date**.

Note:



The properties for **Source** and **Target Plan Level** cannot be changed because they are based on the plan events you selected in step 1.

6. If you want to include the checklists and deliverables from the event, select the **Include Checklist** and **Include Deliverables** checkboxes.
7. Click **Add** to add the plan events to the program timeline.

Field definitions for event properties

Program managers or project managers can modify the event **Properties** values after the event is created.

Field name	Definition	Valid values
Name	Uniquely identifies this event.	
Description	Describes this event (short description).	
Event ID	Specifies a unique ID for this object (event). This value is automatically generated when the event is created, although it can be modified prior to saving the event.	This value cannot be modified once the project has been created.
State	Reflects the current status of the event.	The out-of-the-box values are: Not Started In Progress Complete Closed
Plan Level	Identifies which part of the plan this event is associated with, for example, a specific program, project, or subproject.	
Approval Gate	Indicates if this event requires approval from management before it can be considered <i>achieved</i> .	True or False
Planned	Identifies the date and time the event should be achieved.	Click in the field to select a date from the calendar. Click in the field to select a time from the list.
Forecasted	Identifies the date and time the event is anticipated to be achieved.	Click in the field to select a date from the calendar. Click in the field to select a time from the list.
Actual	Identifies the date and time the event was achieved.	Click in the field to select a date from the calendar.

Field name	Definition	Valid values
		Click in the field to select a time from the list.
Event Code	Can be used to standardize events.	Select a value from the list defined by your administrator. Administrators can color-code your events for easy identification.
Long Description	Describes this event (long description).	
Owner	Identifies the creator of this object.	Use Change Owner  to modify this value.
Group ID		Use Change Owner  to modify this value.
Template	Indicates if the object is a template.	
Published	Determines if the project, or subproject is accessible to users other than the owner.	True or False.
Minimum Days Before	Specify the minimum number of calendar days that should fall between this event and the event immediately preceding it.	
Minimum Days After	Specify the minimum number of calendar days that should fall between this event and the event immediately following it.	
Project (project-level security)	Associates this event to a security-level project. The project consists of entities that correlate groups of users with the data associated with a given project or subset of a project. Project-level security is defined by your system administrator. Events that are not associated with a security-level project are open for access by everyone.	

Managing event criteria

Add or delete criteria within an event


Event criteria define what is needed for the event to pass specific milestones or approval gates. As a program manager, you can add criteria to, or delete criteria from, an event.






Note:

If your administrator has configured **Teamcenter project security**, the event criteria will be assigned to the same Teamcenter Tc_project as the parent program.

Note:

The delete action deletes the criteria from Teamcenter.







1. Select the event and click **Open** .
2. Click the **Criteria** tab.
3. Do one of the following.

To	Do
Add criteria to an event.	<ol style="list-style-type: none"> a. Click Add Criterion . b. In the Add Criterion panel, specify the Type and define the criterion properties. <div data-bbox="521 1251 1450 1453" style="border: 1px solid #0070C0; padding: 5px; margin: 5px 0;"> <p>Tip:</p> <p>If you want to add multiple criterion with the same or similar values, click Pin Panel  to keep the Add Criterion panel open as you create the criterion.</p> </div> c. Click Add.
Delete criteria from an event	<ol style="list-style-type: none"> a. Select the criterion from the list. b. Click More Commands  > Edit  > Delete Criterion .

Modify the criteria properties




As work proceeds on an event, the project manager can manually update the event criteria to reflect the event's current state. You can update properties on a single criterion, multiple criteria, or on the Information panel.

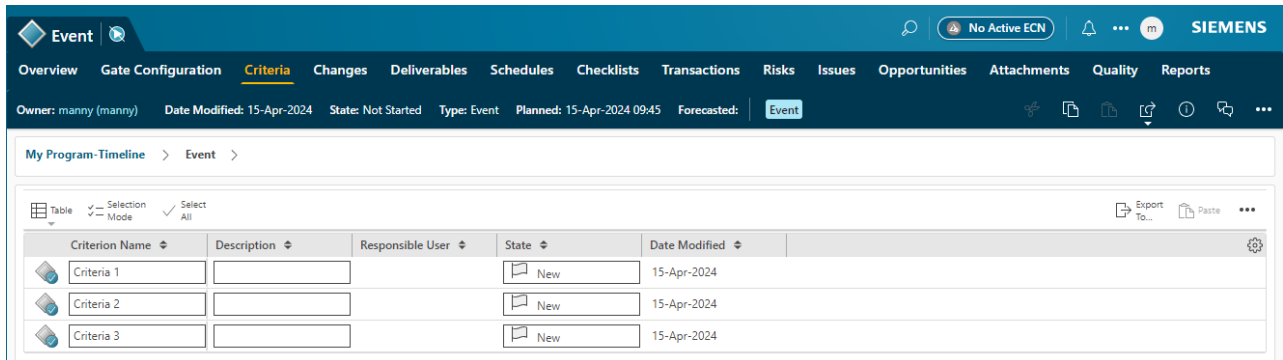
Update properties on a single event criterion



1. Select an event and click **Open** .
2. Click the **Criteria** tab.
3. Select an event criterion from the list and click **Open** .
4. Click **More Commands** **...** > **Edit**  > **Start Edit** .
5. Edit the criterion properties.
6. Click **Edit**  > **Save Edits** .

Update properties on multiple event criteria






This display method enables you to update properties directly within the table. It's a convenient method to use to update properties on more than one event criteria.

1. Select an event and click **Open** .
2. Click the **Criteria** tab.
3. Select the **Table** display method.
4. Click **More Commands** **...** > **Edit**  > **Start Edit** .
5. Edit event criteria properties in the table.




6. Click **Edit**  > **Save Edits** .


Update an event criterion's properties in the Information panel

1. Select an event and click **Open** .
2. Click the **Criteria** tab.
3. Select an event criterion from the list and click **Open** .
4. Click **Information** .
5. Click **Edit** .
6. Edit the event criterion properties.
7. Click **Save** .

Field definitions for event criterion properties

Program managers or project managers can modify the event criterion **Properties** values after the event is created.

Field name	Definition	Valid values
Name	Uniquely identifies this criterion.	
Description	Describes this criterion (short description).	
State	Reflects the current status of the criterion.	The out-of-the-box values are: New Open In Process Ready Pass Fail
Responsible User	Identifies the person responsible for this criterion.	Use Assign Responsible User  to select from all Teamcenter users.

Field name	Definition	Valid values
Critical	Indicates if this criterion is critical to the successful achievement of the event.	True or False.
Owner	Identifies the creator of this object.	Use Change Owner  to modify this value.

Adding plan-level attachments and changes






Add or remove an attachment within the plan components

As a team member, you can add attachments to, or remove attachments from, a program, program deliverable, project, subproject, event, event criteria, risk, issue, or opportunity. An attachment is useful information that assists team members in doing their job, but it is not the actual release-related work. For example, an attachment could include organizational, procedural, or policy information.

When you remove an attachment, the relationship between the attachment and the plan is removed, but it does not delete the attachment object from Teamcenter.

Navigate to any plan level or event location

1. Navigate to the program, program deliverable, project, subproject, or event in your folder structure or from the program timeline.
2. Do one of the following.

To	Do
Navigate to a program, program deliverable, project, subproject, or event.	<ol style="list-style-type: none"> a. Select the returned item from the list and click Open . b. Click the Attachments tab.
Navigate to an event criteria.	<ol style="list-style-type: none"> a. Select an event from the list and click Open . b. Click the Criteria tab. c. Select a criterion from the list and click Open .
Navigate to a risk, issue or opportunity.	<ol style="list-style-type: none"> a. Select a returned item from the list and click Open . b. Click the Risks, Issues or Opportunity tab. c. Select a item from the list and click Open .

To**Do**

-
- d. Click the **Attachments** tab.
-

3. Follow the instructions to add or remove an attachment.

Add an attachment to any plan level or event location


Note:


If your administrator has configured **Teamcenter project security**, the attachment will be assigned to the same Teamcenter Tc_project as the parent program.

1. Click **Add to** ⊕.
2. In the **Add** panel, do one of the following.

To**Do**

Search for an attachment.

- a. Click the **Search** tab.
- b. Enter the search criteria and click .
- c. Select the attachment.

Select an attachment that was previously copied to the paste buffer using **Copy** .

- a. Click the **Palette** tab.
- b. Select an attachment from the **Clipboard** section.

Select a favorite or recently viewed attachment.

- a. Click the **Palette** tab.
- b. Select an attachment from the **Favorites** or **Recent** section.

Add a new attachment.

- a. Click the **New** tab.
- b. Click **Select File** to find a new attachment.
- c. Enter the properties for the new attachment.


The properties vary depending on the type of attachment being created.

Tip:

If you want to add multiple attachments, click **Pin Panel**  to keep the **Add** panel open as you attach files.

3. Click **Add**.

Remove an attachment from any plan level or event location

1. Select the attachment you want to remove.
2. Click **Cut** .

Associate or remove a change within the plan components

As a program manager or change manager, you can associate engineering change requests (ECRs) or engineering change notices (ECNs) to, or remove an ECR or ECN from, a program, project, subproject, or event.

When you remove a change, the relationship between the change and the program, project, subproject, or event is removed, but it does not delete the change from Teamcenter.

Note:

A plan component can also be associated with an ECR or ECN from within Change Management.


Associate a change with a program, project, subproject, or event

Note:



If your administrator has configured **Teamcenter project security**, the change will be assigned to the same Teamcenter Tc_project as the parent program.

1. Navigate to the program, project, subproject, or event in your folder structure or from the program timeline.
2. Select the desired program, project, subproject, or event.
3. Click the **Changes** tab.

Note:


Select a layout from **Layout Manager**  to display details below the timeline, such as the **Changes** tab.

4. Click **Add Change** .
5. In the **Add Change** panel, do one of the following.

To	Do
Search for a change object.	<ol style="list-style-type: none"> a. Click the Search tab. b. Enter the search criteria and click . c. Select one or more ECRs or ECNs.
Select a change object that was previously copied to the paste buffer using Copy  .	<ol style="list-style-type: none"> a. Click the Palette tab. b. Select one or more ECRs or ECNs from the Clipboard section.
Select a favorite or recently viewed change object.	<ol style="list-style-type: none"> a. Click the Palette tab. b. Select an ECN from the Favorites or Recent section. c. Select one or more ECRs or ECNs from the Favorites or Recent section.

6. Click **Add**.

Remove a change from a program, project, subproject, or event

1. Select the change you want to remove.
2. Click **Cut** .

Linking related objects

What objects can be related?

Use the relations feature to identify a relationship between Program Planning objects, such as deliverables, risks, criteria, or schedules. Refer to the tables below for valid relationship options.

Example:

A supplier program deliverable is at risk for delay. Create a relation between the program deliverable and a program risk to track the delay.

The following apply:

- Relations are not directional and do not signify a dependency.
- Relations can be one-to-one, one-to-many, or many-to-one.
- Relations can be added or deleted, as desired.
- Relations can be added irrespective of the object's status or state.





Possible relations for plan level (program, project, subproject) objects						
	Program Deliverable	ECR	Program Risk	Program Issue	Program Opportunity	Schedule
Program Deliverable			✓	✓	✓	
ECR			✓	✓	✓	
Program Risk	✓	✓	✓	✓	✓	✓
Program Issue	✓	✓	✓	✓	✓	✓
Program Opportunity	✓	✓	✓	✓	✓	✓
Schedule			✓	✓	✓	

Possible relations for event level objects								
	Program Deliverable	ECR	Program Risk	Program Issue	Program Opportunity	Schedule	Criteria	Checklist
Program Deliverable			✓	✓	✓		✓	✓
ECR			✓	✓	✓		✓	✓
Program Risk	✓	✓	✓	✓	✓	✓	✓	
Program Issue	✓	✓	✓	✓	✓	✓	✓	
Program Opportunity	✓	✓	✓	✓	✓	✓	✓	
Schedule			✓	✓	✓		✓	
Criteria	✓	✓				✓	✓	
Checklist	✓	✓						



View related objects

As a team member, you can view and open related objects from the **Program Relation** panel, or view a graphical representation of the related objects using the **Relations** tab.

View related objects from the Program Relation panel

1. Select the program and click **Open** .
2. Navigate to the desired program object, for example, a program deliverable, risk, or issue.
3. Navigate to the object, for example, a program deliverable and select the object.
4. Click **More Commands ...** > **Manage**  > **Program Relation** .
5. On the **Program Relation** panel, review the related links associated with the selected object.
6. (Optional) Hover over the related links associated with the selected object and click **Open**  to open the linked object.






View a graphical representation of related objects



1. Select the program from the list and click **Open** .
2. Navigate to the desired program object, for example, a program deliverable, risk, or issue, and click **Open** .
3. Click the **Relations** tab.
4. Use the Relation Browser feature to view the related links.

Add or remove a relation link

As a program manager, you can add or remove relation links between certain Program Planning objects to help you better manage the program objects. When you remove a relation link the link between the two objects is removed, but the object is not deleted.




Add a relation link

1. Select the program from the list and click **Open** .
2. Navigate to the object, for example, a program deliverable and select the object.
3. Click **More Commands ...** > **Manage**  > **Program Relation** .
4. In the **Program Relation** panel, click **Add** , or click **Paste**  to paste an object from the clipboard.
5. Do one of the following.

To	Do
Search for an object.	<ol style="list-style-type: none"> Click the Search tab. Enter the search criteria and click . Select the object.
Select an object that was previously copied to the paste buffer using Copy  .	<ol style="list-style-type: none"> Click the Palette tab. Select an object from the Clipboard section.
Select a favorite or recently viewed object.	<ol style="list-style-type: none"> Click the Palette tab. Select an object from the Favorites or Recent section.
Add a new object.	<ol style="list-style-type: none"> Click the New tab. Specify a Type for the new object. Enter the properties for the new object. <p>The properties vary depending on the type of object being created.</p>

- Click **Add**.

Remove a relation link

- Navigate to the object, for example, a program deliverable and select the object.
- Click **More Commands ...** > **Manage**  > **Program Relation** .
- In the **Program Relation** panel, hover over the object link you want to remove and click **Remove** .
- Close the **Program Relation** panel.

Managing resources for a program object

Assign a resource to one or more program objects

A resource is the person who is accountable for completing the work on the assigned program object. Program objects that can have an assigned resource include program risks, issues, opportunities, event criteria, and program deliverables at any plan level (program, project, subproject, and event).





Whether you are assigning or replacing a resource, the following apply.

- Assign the resource after the program object is created, as you can't add the resource during its creation.
- If the selected program object, such as a program deliverable, is not in a valid released status, such as Work in Progress or No Status, then you can only add a resource to it.

Note:

You can also **assign and remove users when viewing program objects on the program timeline**.

1. Navigate to the desired deliverable (program, project, subproject, or event), risk, issue, opportunity, or event criteria.
2. Do one of the following.

To	Do
Assign a user to a single plan component.	<ol style="list-style-type: none"> a. Select the program object from the list. b. Click Resource Assignment  > Assign Resource .
Assign a user to multiple plan components.	<ol style="list-style-type: none"> a. Enter multiselect mode and select the first object. b. Select each subsequent object of the same type that you want to include. A check mark appears after each selected object. c. Click Resource Assignment  > Assign Resource .

3. In the **Assign Resource** panel, select the user or resource pool to assign to this program object and click **Assign**.

Tip:

If you have a large number of users, you can filter the list by **Group**, **Role**, and **Project**. If you know the exact user or resource pool you are looking for, you can type the name into the **Filter** box.

Replace a resource



There can be only one resource assigned to each program object.

- To replace a resource on a program object, follow the steps to **assign a resource** and then select the new user or resource pool.

Remove a resource assignment

You can not remove users from multiple program objects using multi-select. You must select each individual object to remove its assigned user.

Procedure

1. Navigate to the desired program object (program, project, subproject, or event), risk, issue, opportunity, or event criteria.
2. Select the program object from the list.
3. Click **Resource Assignment**  > **Remove User** .

The user is removed from the program object.

7. Creating, managing, and assigning deliverables

What are program deliverables and deliverable instances?

A *program deliverable* represents a work product that is to be created or modified in the context of the program, project, subproject, or event. Collectively, the program deliverables (in conjunction with changes) represent the scope of work for the program, project, subproject, or event.

The program deliverable is a special object for Program Planning and can be used as a container for the actual work products to be created or modified. The program deliverable can be used to:

- Group your program, project, subproject, and event deliverables in a logical manner, for example, all quality documents.
- Create placeholders for work products that don't yet exist.

A *deliverable instance* is the actual work product, such as an item, part, or document, that needs to be completed for the program, project, subproject, or event. You can specify almost any type of item revision object as a deliverable instance.

Example:

An engine redesign is an example of a program deliverable and the corresponding engine CAD drawing is the deliverable instance associated with that program deliverable.


Additionally, the program deliverable and deliverable instance have special significance to Program Planning, as you can generate schedules for either the program deliverables or the deliverable instances.


View program deliverable properties, references, and revisions

You can open a program deliverable's **Overview** tab to see information on the deliverable properties, view where the deliverable is used, and see all the revisions for the selected deliverable.

1. Navigate to the program, project, subproject, or event in your folder structure or from the **program timeline**.
2. Select the desired program, project, subproject, or event with the deliverable you want to view.
3. Click on the **Deliverables** tab.


Note:

Select a layout from **Layout Manager**  to display details below the timeline, such as the **Deliverables** tab.

4. Select a deliverable from the list and then click **Open**  to view its details.
5. From the **Overview** tab, view the following sections to see more details on the program deliverable.
 - **Properties.** Displays the program deliverable properties, such as the name, description, revision information, and deliverable type.
 - **References.** Displays where the program deliverable is used, such as in a parent program. You can select a reference object and then open it to view additional details.
 - **Revisions.** Displays all the revisions for the program deliverable. You can select a specific revision and open it to view additional details.

View program deliverable instances and attachments

As a team member you can quickly view and access all instances and attachments associated with a particular program deliverable without opening the program deliverable.

1. Navigate to the program, project, subproject, or event in your folder structure or from the **program timeline**.
2. Select the desired program deliverable from the list.
3. Click **Information** .
4. On the **Information** panel, do one of the following.
 - Click the **Deliverables** tab to view all the deliverable instances associated with this program deliverable.
 - Click the **Attachments** tab to view all the attachments associated with this program deliverable.
5. (Optional) Click an attachment or deliverable instance to open the object.

Add or remove a deliverable within the plan components

As a program manager or program administrator, you can add program deliverables to, or remove program deliverables from, a program, project, subproject, or event. When you remove a program

deliverable, the relationship between the program deliverable and the plan component is removed, but it does not delete the deliverable from Teamcenter.

This procedure provides the process for adding the program deliverable, which is the container for the deliverable instance.

Example:

An engine redesign is an example of a program deliverable and the corresponding engine CAD drawing is the deliverable instance associated with that program deliverable.

Add a deliverable to a program, project, subproject, or event

The program deliverable can be created from the **Home** folder and then added to the program, project, subproject, or event.

Note:

- If your administrator has configured **Teamcenter project security**, the deliverable will be assigned to the same Teamcenter Tc_project as the parent program.
- When you are adding a deliverable to an event, the due date defaults to the planned date for the event. You can change this to a different date if necessary.


1. Navigate to the program, project, subproject or event in your folder structure or from the program timeline.
2. Select the desired program, project, subproject, or event.
3. Click the **Deliverables** tab.
4. In the **Deliverables** section, click **Add To** ⊕.
5. In the **Add** panel, do one of the following.

To	Do
Search for an existing program deliverable.	<ol style="list-style-type: none"> a. Click the Search tab. b. Enter the search criteria and click 🔍. c. Select the program deliverable.
Select a program deliverable that was previously copied to the paste buffer using Copy 📄.	<ol style="list-style-type: none"> a. Click the Palette tab. b. Select a program deliverable from the Clipboard section.

To	Do
Select a favorite or recently viewed program deliverable.	<ol style="list-style-type: none"> Click the Palette tab. Select a program deliverable from the Favorites or Recent section.
Add a new program deliverable.	<ol style="list-style-type: none"> Click the New tab. Specify the Type of the program deliverable. Enter the properties for the new program deliverable.

- Click **Add**.

Remove a deliverable from a program, project, subproject, or event

- Select the deliverable you want to remove.
- Click **Cut** .

Add or remove a deliverable instance within a program deliverable

As a team member, you can add deliverable instances to, or remove deliverable instances from, a program deliverable. A program deliverable is the container for a deliverable instance. A deliverable instance is the actual work product (for example, a drawing, file, or part) to be created or modified for the program deliverable. A program deliverable (and deliverable instances) can be added to a program, project, subproject, or event.

When you remove a deliverable instance, the relationship between the deliverable instance and the program deliverable is removed, but it does not delete the deliverable instance from Teamcenter.

Example:

An engine redesign is an example of a program deliverable and the corresponding engine CAD drawing is the deliverable instance associated with that program deliverable.

Add a deliverable instance to a program deliverable

Note:

If your administrator has configured **Teamcenter project security**, the deliverable instance will be assigned to the same Teamcenter Tc_project as the parent program.

- Select the desired program deliverable.

2. Click the **Deliverables** tab.
3. In the **Deliverables** section, click **Add To** ⊕.
4. In the **Add** panel, do one of the following.

To	Do
Search for an object.	<ol style="list-style-type: none"> a. Click the Search tab. b. Enter the search criteria and click 🔍.
Select an object that was previously copied to the paste buffer using Copy 📄.	<ol style="list-style-type: none"> a. Click the Palette tab. b. Select an object from the Clipboard section.
Select a favorite or recently viewed object.	<ol style="list-style-type: none"> a. Click the Palette tab. b. Select an object from the Favorites or Recent section.
Add a new object.	<ol style="list-style-type: none"> a. Click the New tab. b. Click Select File to find a new object. c. Enter the properties for the new deliverable instance.

Tip:

If you want to add multiple deliverable instances with the same or similar values, click **Pin Panel** 📌 to keep the **Add** panel open as you create the instances.

5. Click **Add**.

Remove a deliverable instance from a program deliverable



1. Select the deliverable instance you want to remove.
2. Click **Cut** ✂.

Modify program deliverable properties

Program deliverable properties are typically defined when the deliverable is created, but you can modify these values, if desired. You can update properties on a single deliverable, multiple deliverables, or on the Information panel.



Update properties on a single program deliverable

You can update properties on a program deliverable while in the **List** and **Table** display or from the **program timeline**.

1. Select the **List** or **Table** display.
2. Select the desired program deliverable from the list and click **Edit** .
3. Edit the program deliverable properties.
4. Click **Save** .




Update properties on multiple program deliverables

This display method enables you to update properties directly within the table. It's a convenient method to use to update properties on more than one program deliverable.

1. Select the **Table** display method.
2. Click **Edit** .
3. Edit program deliverable properties in the table.
4. Click **Save** .

Update program deliverable properties in the Information panel

You can access the **Information** panel from within any display method.

1. Select a program deliverable.
2. Click **Information** .
3. Click **Edit** .
4. Edit the program deliverable properties.
5. Click **Save** .

Replace program deliverable revision

A program deliverable represents a work product that is to be created or modified in the context of the program, project, subproject, or event. When the deliverable is added to the program, the current


revision of the deliverable is associated with the program. In some cases, this program deliverable may change or mature as the program is worked to completion or events are met.

If you need to update the deliverable for a program, you can choose to replace it with the latest working revision, or select a specific revision of the deliverable from a list of revisions. This allows you to keep your program deliverables current as you continue the work on your programs.

1. Navigate to the program, project, subproject, or event in your folder structure or from the program timeline.
2. Click the desired program, project, subproject, or event.
3. Click the **Deliverables** tab.
4. Select the deliverable that you want to update to the latest revision.
5. Click **Replace** \leftrightarrow and then do one of the following:
 - Click **Replace Revision** \leftrightarrow to open the **Replace Revision** panel and view a list of all the revisions for the deliverable. You can select the desired revision from the list and then click **Replace** to update the deliverable to the newest revision.

Note:

If you select multiple deliverables, this option is grayed out. You can only select one deliverable if you want to choose a specific revision of the deliverable to replace.

- Click **Replace with Latest Revision**  to update all selected deliverables to their latest revisions. Active Workspace prompts you to confirm the update of the selected deliverables. Click **Replace** to confirm the replacement and update your deliverables to the latest working revision.

Field definitions for program deliverable properties

Program managers and program administrators can modify the program deliverable **Properties** values after the program deliverable has been created.

Field name	Definition	Valid values
ID	Specifies a unique ID for this object (program deliverable). This value is automatically generated when the program deliverable is created, although it can be modified prior to saving the deliverable.	
Revision	Specifies a unique, specific iteration of this program object.	
Name	Uniquely identifies this program deliverable.	

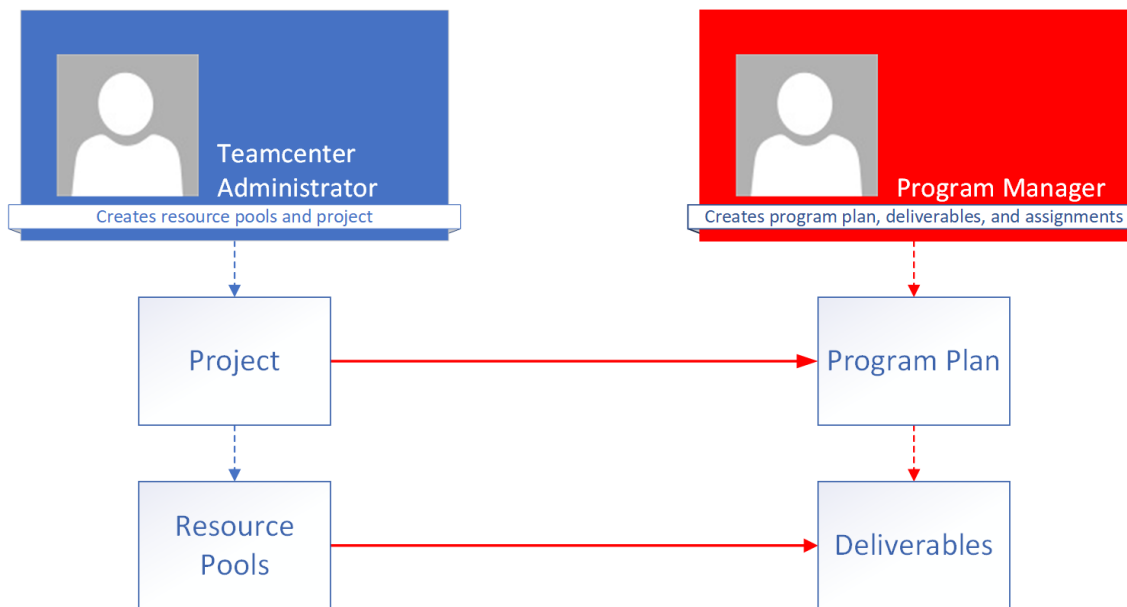
Field name	Definition	Valid values
Description	Describes this program deliverable (short description).	
Type	Identifies the program deliverable type, which is Program Deliverable Revision .	This value cannot be modified.
Release Status	Identifies the status of this program deliverable object within the release life cycle.	True or False
Date Released	Identifies the date that this program deliverable object was released.	True or False
Deliverable Type	Identifies a functional or other classification of the program deliverable.	Valid values are: End Item Sourced Item Internal Item Program Management Quality Management Other
Due Date	Identifies the date by which this deliverable is due.	Click in the field to select a date from the calendar.
State	Identifies the current state of this deliverable. A deliverable progresses through a series of predefined states as the work is completed.	Valid values are: Not Started In Progress Complete Closed
Carryover	Indicates if this program deliverable is life cycled in the next or subsequent event.	True or False
Project (project-level security)	Associates this deliverable to a security-level project. The project consists of entities that correlate groups of users with the data associated with a given project or subset of a project. Project-level security is defined by your system administrator. Deliverables that are not associated with a security-level project are open for access by everyone.	
Schedule Required	Indicates if a schedule is required to plan and execute the work activities to create or update the program deliverable instance. Only program deliverables with Schedule Required set to True can be selected in the autogeneration process.	True or False
Percent Complete	Identifies the total percentage of work that has been completed on this deliverable. The Percent Complete value affects the available values within the State box, and the two values work together to provide a complete picture of the deliverables progress. For example, the total percentage of work that	Enter a numerical value.

Field name	Definition	Valid values
	has been completed on the deliverable is 25 percent and the state is In Progress .	

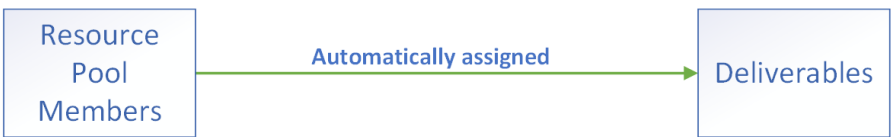
Assigning work to a program team

About program teams and automatically assigning responsible users

A program team is a group of users that are assigned a specific group and role for working on program deliverables. These groups of users are known as **Resource Pools** in Active Workspace. When the program is in the planning stage, these resource pools can be assigned to the plans or the program deliverables. This acts as a placeholder assignment. As the program nears its execution phase, a Program Manager can select a plan and then automatically assign users to program deliverables based on their resource pool assignments.



Populate Users in Active Workspace



Keep the following in mind when configuring program teams:



- The Teamcenter administrator creates the resource pools and the users within these pools.

- The Teamcenter administrator also sets up a project with the necessary resource pools assigned as **Team Members**.
- Since there can be only one responsible user assigned to a program deliverable, when setting up the project, the Teamcenter administrator selects only one user inside the resource pool as Team Members.
- The Program Manager **assigns the appropriate resource pool** as a placeholder resource assignment for an event's deliverables.
- Before the program execution phase starts, the Program Manager must **add the project** to the program plan that they want to automatically assign resources to.

When the users are assigned to the program deliverables, a **Responsible User** is now displayed for the deliverable.

Assign responsible users from the resource pool

Once a **program is configured for assigning work based on resource pool assignments**, you can quickly assign a user as the responsible user from the resource pool for the program deliverable.

1. Open the program you want to assign responsible users to in the **Timeline** view.
2. Select the program plan that contains the deliverables that need to be assigned responsible users.
3. Click **More Commands ... > Manage**  **> Populate Users** .

A message appears stating that the program deliverables are being populated with users and that you will be notified when the process completes.

Note:

The notification appears in your **Alerts** area. You can click on the notification view more information, such as how many deliverables were populated with responsible users and the program plan associated with this action.

4. (Optional) Open the program and view the deliverables to verify that the program events were populated with responsible users.

Creating and managing program deliverable dependencies

About program deliverable dependencies

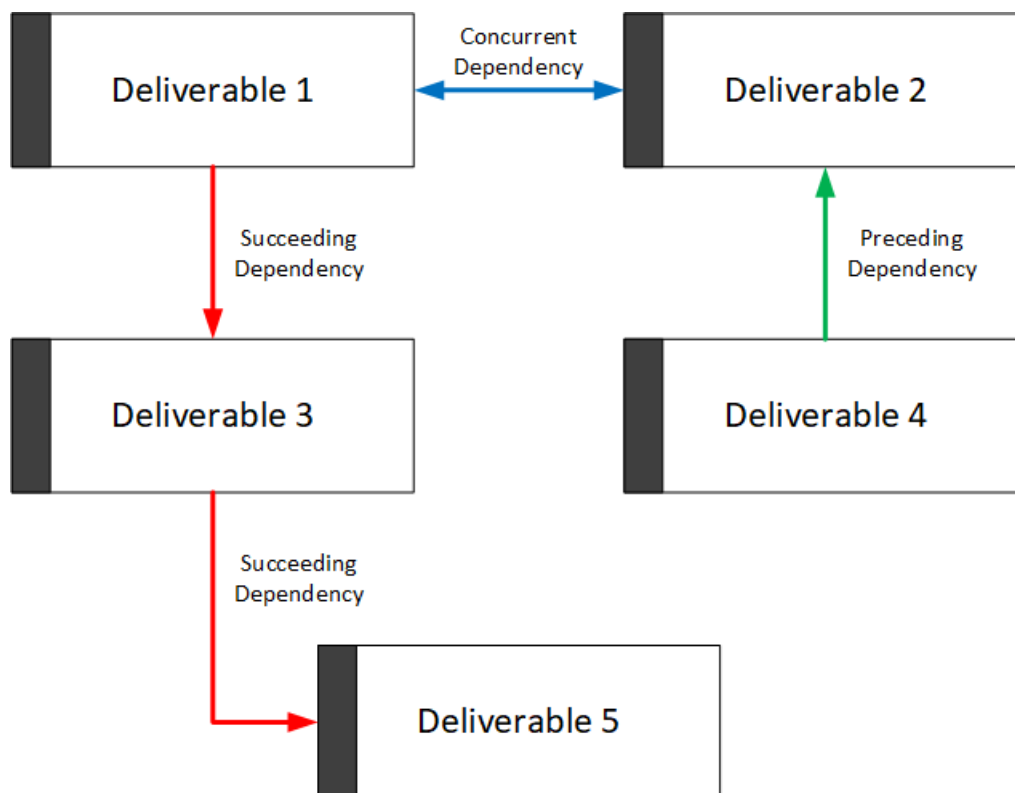
Program deliverable dependencies allow the program planner to set up dependencies between program deliverables and use that information to sequence the order in which the deliverables for events,

projects, and subprojects should be completed. This lets the responsible users assigned to the deliverables know the order in which they should be worked.

A deliverable can be assigned the following dependencies:

- **Preceding:** A deliverable dependency that must be completed before working on the current deliverable.
- **Concurrent:** A deliverable dependency that can be worked on at the same time as the current deliverable.
- **Succeeding:** A deliverable dependency that will be worked on after the current deliverable.




The graphic below shows an example of five deliverables with various, different dependencies assigned. Users looking at these deliverables see that they can work on deliverable 1 and 2 at the same time because they are concurrent. However, due to the preceding dependency between deliverable 2 and 4, the users know that deliverable 2 must be completed before starting work on deliverable 4.



When deliverable dependencies are created, Active Workspace sequences the order of the deliverables. This helps the program planner better plan the project work and ensures that deliverables are worked in the proper order. As work continues on the program and dependencies are added, modified, or removed, Active Workspace can resequence the deliverables as needed. This ensures that the program deliverables and their dependencies are always accurate and up-to-date.

Create program deliverable dependencies

You can create program deliverable dependencies and sequence the deliverables for an event in a program, project, or subproject. This lets the responsible users assigned to the deliverables know the order in which they should be worked.

1. Follow the instructions to add deliverables to an event in your program, project, or subproject.
2. Once all the deliverables are added, select a deliverable from the list and then click **More Commands**  > **Manage**  > **Author Dependencies** .

The **Dependencies** panel opens.

Note:

You can also create dependencies when **viewing a program object from the timeline.**

3. Drag any of your deliverables to the **Preceding**, **Concurrent** or **Succeeding** sections of the **Dependencies** panel.

In the example screenshot below, Deliverable 2 is selected. Deliverable 1 is dropped into the **Preceding** section, showing it should be completed before work starts on Deliverable 2. Deliverable 3 is dropped into the **Concurrent** section, showing it can be worked on at the same time as Deliverable 2. Finally, Deliverable 4 is dropped into the **Succeeding** section, showing it will be worked on after Deliverable 2.

4. Click **Save**.
5. A prompt appears asking if you want to resequence the deliverables. Select one of the following options.
 - **Yes:** Starts the resequencing process. The amount of time the resequencing takes depends on the number of deliverable dependencies created.
 - **No:** Does not start the resequencing process. If you select this option, you **can resequence your deliverables later**.
 - **Run in Background:** Runs the resequencing process in the background, so you can continue working. Select this option if you are authoring a large number of deliverable dependencies.
6. Once resequencing is complete, Active Workspace assigns numbers to the deliverables, which are displayed in the **Sequence** column.
7. Continue selecting the deliverables for your event and authoring dependencies between these deliverables. Each time you author new dependencies, Active Workspace prompts you to resequence the deliverables and adjusts the **Sequence** number as needed.

When you are finished authoring the dependencies, your responsible users can **view the dependencies you created to help them plan their work**.

View program deliverable dependencies

You can view program deliverable dependencies to see how the deliverables relate to one another. This can help you plan your work and prioritize deliverables that need to be completed first. There are two different ways to view the program deliverable dependencies.

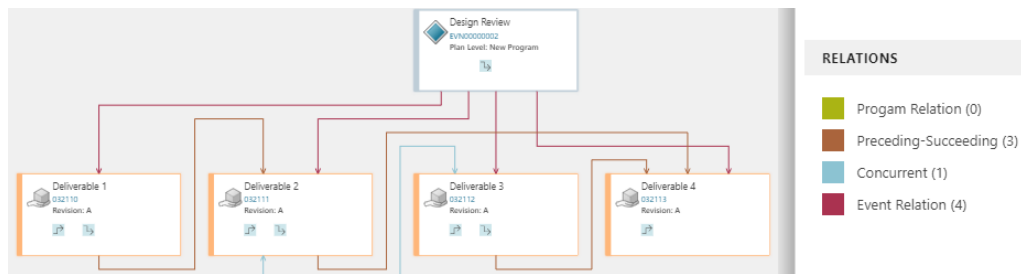
The **Relation Browser**: Allows you to see a graphical representation of the deliverable dependencies all at once. This view is good for getting a big picture overview of all the deliverables and their dependencies.

The **Information Panel**: Lists the **Preceding**, **Concurrent**, and **Succeeding** deliverable dependencies for a selected program deliverable. This view is good for looking at the dependencies for a specific deliverable.

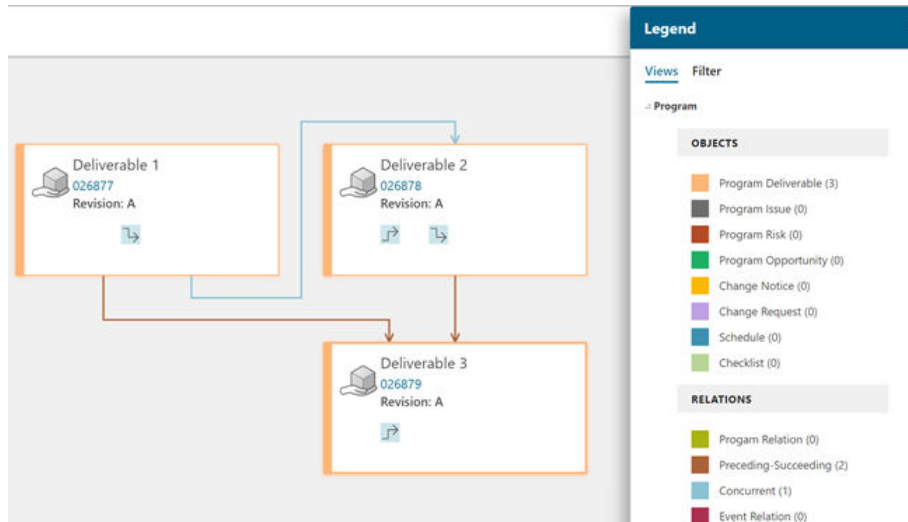
View deliverable dependencies with the Relation Browser


1. Open the desired event from a program's timeline or from its **Events** tab.
2. Click the event's **Deliverables** tab.
3. Do one of the following:
 - Expand the **Dependencies** section.

The **Relation Browser** displays all the program deliverables and their dependencies.

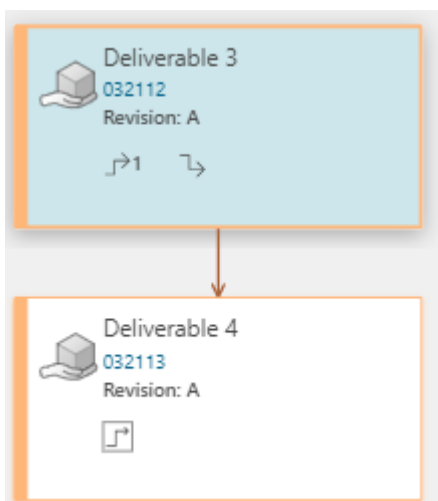


- Select a program deliverable from the list, open it, and then click the **Relations** tab. This displays the dependent program deliverables for only the selected deliverable in the **Relation Browser**.

**Tip:**

At the top of the **Relation Browser**, you can click **Legend**  to open the **Legend** panel. From here, you can expand the **Program** view options to customize the objects and relations displayed in the browser. You can also click the **Filter** tab and adjust the filters for your desired view.

- (Optional) Click on any of the deliverables to view only that deliverable and any of its dependencies in the **Relation Browser**.

**View deliverable dependencies in the Information panel**

- Open the desired event from a program's timeline or from its **Events** tab.
- Click the event's **Deliverables** tab.

3. Select a deliverable from the list.
4. Click **Information** ⓘ.

The **Information** panel opens.

5. Click the chevron > next to the tabs at the top of the panel and then select **Dependencies**.

The program deliverable dependencies for the selected deliverable are displayed.

6. Select a deliverable and open it to view its details.

View program deliverable sequence

You can view the program deliverable sequence in order to better plan how to work on the program deliverables.

1. Open the desired event from a program's timeline or from its **Events** tab.
2. Click the event's **Deliverables** tab.
3. The **Sequence** column in the list of deliverables displays the order in which the deliverables should be worked.



▼ Deliverables

Object	Type	Sequence	Responsible User
028144/A;1-Deliverable 1	Program Deliverable Revision	1	
028146/A;1-Deliverable 2	Program Deliverable Revision	2	
028148/A;1-Deliverable 3	Program Deliverable Revision	2	
028150/A;1-Deliverable 4	Program Deliverable Revision	3	

Active Workspace sets the deliverable sequence based on the dependencies **created for the deliverables**.

Modify program deliverable dependencies

You can modify the deliverable dependencies as the program event is worked to completion. When you modify the dependencies, Active Workspace automatically resequences the deliverables based on the modifications you make.


1. Open the desired event from a program's timeline or from its **Events** tab.
2. Click the event's **Deliverables** tab.
3. Select the deliverable you want to modify.
4. Click **More Commands ...** > **Manage**  > **Author Dependencies** .

The **Dependencies** panel opens and displays the **Preceding**, **Concurrent**, and **Succeeding** dependencies.


5. Drag a deliverable to the desired section of the panel.

Dependencies ✕ Close


▼ **Preceding**
Drag and drop here

 **Deliverable 1**
032430
Revision: A
Due Date: 08-Oct-2023 09:19
Percent Complete: 0
Deliverable Instance Count: 0

▼ **Concurrent**
Drag and drop here

 **Deliverable 3**
032433
Revision: A
Due Date: 08-Oct-2023 09:19
Percent Complete: 0
Deliverable Instance Count: 0

▼ **Succeeding**
Drag and drop here

 **Deliverable 4**
032435
Revision: A
Due Date: 08-Oct-2023 09:19
Percent Complete: 0
Deliverable Instance Count: 0

Save

For example, you can drag a deliverable from the **Succeeding** section to the **Concurrent** section, as shown in the above graphic.



6. Click **Save**.

7. A prompt appears asking if you want to resequence the deliverables. Select one of the following options.
 - **Yes:** Starts the resequencing process. The amount of time the resequencing takes depends on the number of deliverable dependencies modified.
 - **No:** Does not start the resequencing process. If you select this option, you **can resequence your deliverables later.**
 - **Run in Background:** Runs the resequencing process in the background, so you can continue working. Select this option if you are modifying a large number of deliverable dependencies.
8. Once resequencing is complete, Active Workspace adjusts the deliverable sequence and updates the **Sequence** column if necessary.


You can repeat this process with the remaining deliverables to modify the dependencies as needed.

Remove a program deliverable dependency

You can remove a deliverable dependency when it is no longer valid. When you remove a dependency, Active Workspace automatically resequences the remaining deliverables.

1. Open the desired event from a program's timeline or from its **Events** tab.
2. Click the event's **Deliverables** tab.
3. Select the deliverable with the dependency you want to remove.
4. Click **More Commands ...** > **Manage**  > **Author Dependencies** .

The **Dependencies** panel opens and displays the **Preceding**, **Concurrent**, and **Succeeding** dependencies.

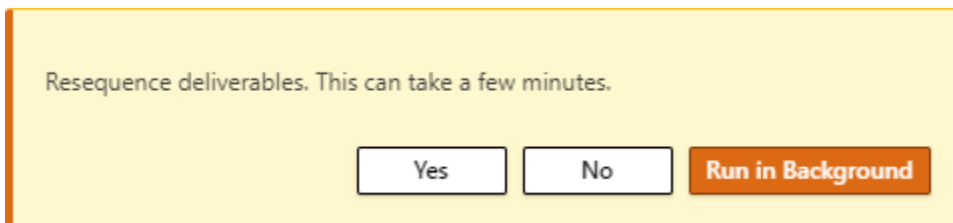
5. Select the dependency you want to remove and then click **Delete** .
6. Click **Save**.
7. A prompt appears asking if you want to resequence the deliverables. Select one of the following options.
 - **Yes:** Starts the resequencing process. The amount of time the resequencing takes depends on the number of deliverable dependencies removed.
 - **No:** Does not start the resequencing process. If you select this option, you **can resequence your deliverables later.**


- **Run in Background:** Runs the resequencing process in the background, so you can continue working. Select this option if you are removing a large number of deliverable dependencies.
8. Once resequencing is complete, Active Workspace adjusts the deliverable sequence and updates the **Sequence** column if necessary.

You can repeat this process with the remaining deliverables to remove other dependencies as needed.

Update program deliverable dependencies sequence

As you **create**, **modify**, or **remove** deliverable dependencies, Active Workspace prompts you to resequence the program deliverables. If you select **No** from this prompt, you can manually resequence the deliverables from the event's **Deliverables** tab at a later time.



1. Navigate to the event's **Deliverables** tab in your program, project, or subproject.
2. Click **Update deliverable sequence** .

Overview Criteria Changes **Deliverables** Schedules Checklists

Home Automation Hub-Timeline > Design Review >

▼ DELIVERABLES

Table **Update deliverab...** Export To... Paste Add to ...

Object String	Type
031224/A;1-Deliverable 4	Program Deliverable Revision
031225/A;1-Deliverable 1	Program Deliverable Revision
031226/A;1-Deliverable 2	Program Deliverable Revision
031227/A;1-Deliverable 3	Program Deliverable Revision

A prompt appears asking you to resequence the deliverables.

3. Choose one of the following:

- **Yes:** Starts the resequencing process. The amount of time the resequencing takes depends on the number of deliverable dependencies created, modified, and removed.
- **Run in Background:** Runs the resequencing process in the background, so you can continue working. Select this option if you created, modified, or removed a large number of deliverable dependencies.
- **No:** Closes the prompt without taking any action. You can click **Update deliverable sequence** again to view the prompt and resequence your deliverables.

Once resequencing is complete, Active Workspace adjusts the deliverable sequence and updates the **Sequence** column if necessary.

Using the Board view to manage program deliverables

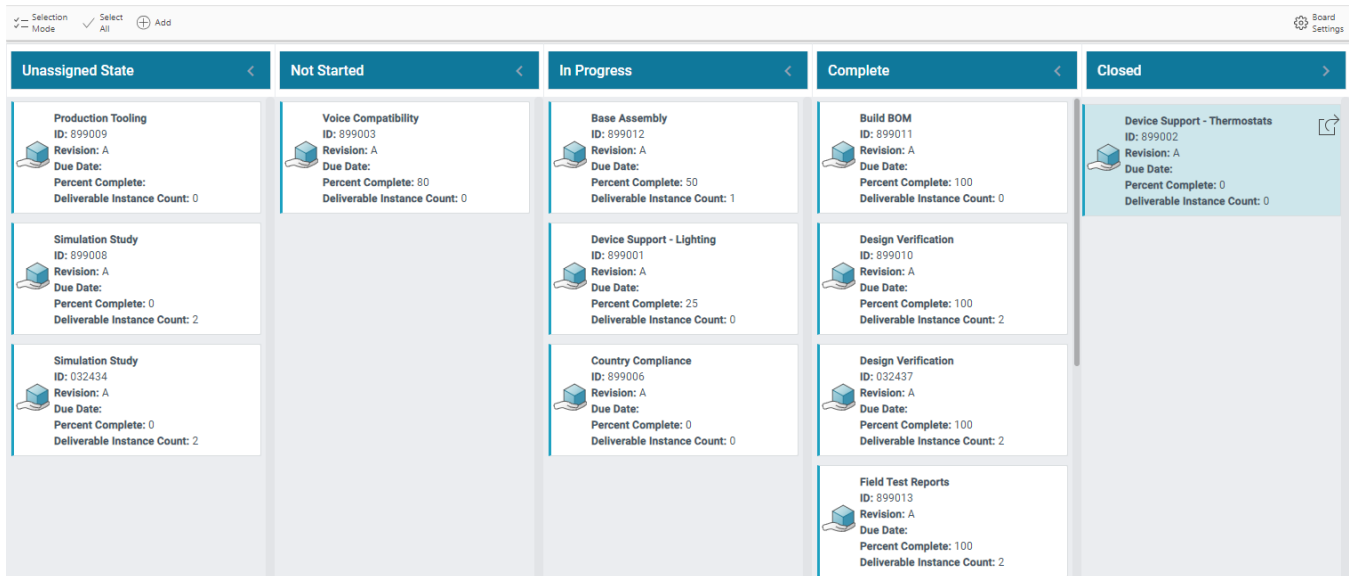
Manage program deliverables in the Board view

The **Board** is an interactive view that allows you to quickly prioritize and manage all your assigned program deliverables. The program deliverables are distributed across different lanes depending on the state.

The out-of-the-box lanes are defined as **Unassigned**, **Not Started**, **In Progress**, **Complete**, and **Closed**.

Note:

The program deliverable lanes can be configured by your administrator and may differ from those described in this documentation.



Each program deliverable card on the **Board** displays some information, such as the name of the deliverable, the due date, the work progress, and number of deliverable instances attached. You can view more details by selecting a program deliverable card, and then clicking **Information** ⓘ. This opens the **Information** panel. You can then click through the different tabs at the top of the panel to view more information about the selected deliverable.






Procedure

1. Click the **PROGRAM DELIVERABLES** tile on the home page.

The program deliverables assigned to you are displayed.

2. Click a program deliverable card on the board to select it.
3. Do one of the following:

To	Do
View program deliverable properties.	<ol style="list-style-type: none"> a. Click Information ⓘ. The Information panel opens. b. Click the Summary, Deliverables, Attachments, and Dependencies tabs across the top of the panel to view additional details about the program deliverable.

To	Do
	<ul style="list-style-type: none"> c. (Optional) Click Edit  to change the program deliverable properties directly from the Information panel. When you are finished, click Save  to update the properties.
Drag and drop a program deliverable from one lane to another.	<ul style="list-style-type: none"> • Drag the selected program deliverable card to a different status lane. <p>The state of the deliverable updates to the corresponding status of the lane.</p>
Attach deliverable instances to a program deliverable.	<ul style="list-style-type: none"> a. Click Add . b. In the New panel, add a deliverable instance in one of these ways: <ul style="list-style-type: none"> • Click the New tab. Specify the Type and click Choose File to find and associate a deliverable instance with the new deliverable you are creating. Enter the properties for the new deliverable. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Note:</p> <p>The properties vary depending on the type of deliverable being created.</p> </div> <ul style="list-style-type: none"> • Click the Palette tab and select a deliverable from the Clipboard, Favorites, or Recent section. • Click the Search tab, enter the search criteria and click Search . Select a deliverable from the returned list. c. Click Add. <p>The Deliverable Instance Count updates accordingly.</p>
Limit the number of program deliverables per column.	<ul style="list-style-type: none"> a. Click Board Settings . b. In the Board Settings panel, enter the number of program deliverables you want to display per column. c. Click Set. <p>The board refreshes and only displays the number of tasks specified.</p>

To

Do

Tip:

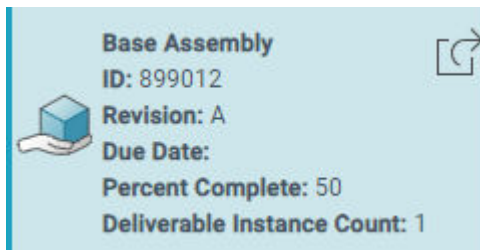
If you want to reset the **Board** to the default number of tasks displayed per column, click **Board Settings** ⚙️ and then click **Reset**.

View and edit work progress for program deliverables

You can quickly view and manage the work progress for program deliverables.

Procedure

1. Click the **PROGRAM DELIVERABLES** tile on the home page.
2. Click a program deliverable card on the board to select it.
3. View the work progress for a program deliverable in one of these ways:
 - View the **Percent Complete** property on the program deliverable card.



- Click **Information** ⓘ and view the **Percent Complete** property.
4. (Optional) Click **Edit** ✎ to change the **Percent Complete** property directly from the **Information** panel.

When you are finished, click **Save** 💾 to update the property.

Once you update the total percentage of work completed for the program deliverable, the **State** will update automatically. For example, if the total percentage of work completed for a program deliverable is updated from 0 percent complete to 25 percent complete, then the state will update from **Not Started** to **In Progress**.

8. Creating and managing schedules

Using schedules in Program Planning

Schedules, which are optional, are useful in planning the detailed execution of work scoped for a program. A program or functional manager can leverage automated schedule generation options offered by Program Planning to perform detailed planning of event deliverables or changes. Program Planning supports several types of schedules, which provides flexibility in how you use schedules to manage the scope of work within the plan.

Master schedule	Combines individual schedules into a single master schedule to visualize the entire scope of work planned for an event.
Auto-generated change or deliverable schedule	Automatically generates schedules for program deliverables, deliverable instances, or impacted items on an Engineering Change Notice (ECN). With this approach, the respective objects are also automatically tagged to the schedules.

Basic schedule functionality is discussed in *Active Workspace Schedule Manager*.

Generating schedules for changes and deliverables

How are schedules generated?

As a program manager, you can generate schedules for event changes, event program deliverables, and program deliverable instances. These schedules are created using a schedule template, which is based on the Schedule Template Attribute Map (STAM) and optional Schedule Template Value Map (STVM). Prior to generating your schedules, your system administrator must define the schedule templates, STAMs, and STVMs based on your organization's criterion.

Note:


Schedule generation is an asynchronous process which requires dispatcher services to be running in the background. Your system administrator can find information about configuring asynchronous service in [After installation Program Planning configuration tasks](#).

Generate schedules for a change or deliverable

As a program manager, you can generate schedules at the event-level for a change (impacted items) or deliverables (program deliverables or deliverable instances). The schedule can be created for each impacted item in a change, or each deliverable instance (e.g. parts, drawings, or documents), or for the program deliverables (the high-level container for the deliverable instances).

Note:

If your administrator has configured **Teamcenter project security**, the schedule will be assigned to the same Teamcenter Tc_project as the parent program.

1. Navigate to the event in your folder structure or from the program timeline.
2. Select the desired event and click **Open** .
3. Do one of the following.

To	Do
Generate a schedule for a change.	<ol style="list-style-type: none"> a. Click the Changes tab. b. Select the change from the list.
Generate a schedule for a deliverable.	<ol style="list-style-type: none"> a. Click the Deliverables tab. b. Select the deliverable from the list.

4. Click **More Commands ...** > **Manage**  > **Generate Schedules** .


Note:

The **Generate Schedules** command is only available when the property **Schedule Required** is set to **True**.

5. In the **Generate Schedules** panel, do the following.
 - a. If you are generating a schedule from a deliverable, in the **Source** box, select the input source for the schedule (either program deliverable or deliverable instances).


If you are generating a schedule from a changes, this field defaults to **Impacted Items**.
 - b. Select **Start Date** for this schedule to start on the event's start date, or select **Finish Date** to have the schedule end by the event's planned finish date.
 - c. Define the **Reference Date** for the schedule. The reference date will be the start date of the schedule.
 - d. Click **Generate Schedules**

The schedule name will contain the name of the ECN or impacted item that the schedule was created for.

6. (Optional) Click **Alerts**  to verify that the schedule generation request was sent. A separate alert is sent when the schedule is successfully created.
7. View the generated schedule from the **Schedules** tab.

Review schedule generation transactions

As a program manager, when you generate schedules based on deliverables or changes, the system creates transactions upon which the schedule is based. If you want, you can review the transactions that were used to create the schedule you generated. You can also delete transactions, if necessary.

1. Generate a schedule from a change notice or program deliverable.
2. From the **Event** location, click the **Transactions** tab.
3. Review the generated transactions.
4. (Optional) Delete a transaction.
 - a. Select a transaction from the list.
 - b. Click **Edit**  > **Delete Transactions**.

Create a master schedule


As a program manager, you may want to create a master schedule from several independent schedules so that you have visibility on the progress of the entire scope of work and can create cross-schedule dependencies to more effectively coordinate this work. For example, a master schedule helps you determine when the completion of a change, deliverable, or schedule is dependent on the work in another change, deliverable, or schedule.





Note:

If your administrator has configured **Teamcenter project security**, the schedule will be assigned to the same Teamcenter Tc_project as the parent program.

1. Navigate to the program in your folder structure or from the program timeline.
2. Select the desired program.
3. Click the **Schedules** tab.

Note:

Select a layout from **Layout Manager**  to display details below the timeline, such as the **Schedules** tab.

4. Enter multiselect mode and click each schedule in the list that you want to include in the master schedule.
5. Click **More Commands**  > **New**  > **Create Master Schedule** .
6. In the **Create Master Schedule** panel, define the master schedule's properties and click **Create**.
7. (Optional) Click **Alerts**  to verify that the schedule generation request was sent. A separate alert is sent when the schedule is successfully created.
8. Access the master schedule by clicking the schedule completion link in the **Alerts** list, or navigate to it by clicking **SCHEDULES** on your home page.

Associate or remove a schedule within an event


As a program manager, you can associate a schedule with, or remove a schedule from, an event. Schedules provide additional levels of planning information to the event.

When you remove a schedule from an event, the relationship between the schedule and the event is removed, but it does not delete the schedule object from Teamcenter.



Associate a schedule with an event

1. Navigate to the event in your folder structure or from the program timeline.
2. Select the desired event.
3. Click the **Schedules** tab.

Note:


Select a layout from **Layout Manager**  to display details below the timeline, such as the **Schedules** tab.

4. Click **Add Schedule** .
5. In the **Add Schedule** panel, do one of the following.

To	Do
Search for a schedule.	<ol style="list-style-type: none"> Click the Search tab. Enter the search criteria and click .
Select a schedule that was previously copied to the paste buffer using Copy  .	<ol style="list-style-type: none"> Click the Palette tab. Select a schedule from the Clipboard section.
Select a favorite or recently viewed schedule.	<ol style="list-style-type: none"> Click the Palette tab. Select a schedule from the Favorites or Recent section.

- Click **Add**.

Remove a schedule from an event


- Select a schedule from the list.
- Click **Cut** .



Review schedules created for a specific event

As a program manager or a member of the program management team, you may want to review and possibly modify the schedule.

- Navigate to the event in your folder structure or from the program timeline.
- Select the desired event.
- Click the **Schedules** tab.

Note:



Select a layout from **Layout Manager**  to display details below the timeline, such as the **Schedules** tab.

- Select a schedule and click **Open** .
- Click the **Tasks** or **Gantt** tab to view the schedule tasks.
- Select a task and click **Open** .

Find information about Schedule Manager functionality in *Active Workspace Schedule Management*.

Shift schedules when the event date changes

When an event date changes, you can quickly shift the schedules associated with the event backward or forward in time to keep the schedule dates correct due to the change in the event date. For example, a Program Manager changes the planned date for an event from October 2nd to September 25th. Due to this change, the date for the event now occurs before the planned finish of the associated schedule. The schedule now needs to be shifted backward in time so that the completion date is before September 25th.

1. Open the program with the changed event date in the program timeline.
2. Click on the event. The associated schedules are displayed below the program timeline.
3. Select the schedule you want to shift and then click **More Commands** **...** > **Edit**  > **Shift Schedule** .

The **Shift Schedule** panel opens.

4. In the **Shift by:** section, choose if you want to shift the schedule by a specified number of days or by a specific date.
 - If you select **Days**, do the following:
 - Choose a **Shift direction**. **Forward** shifts the schedule forward in time. **Backward** shifts it backward in time.
 - Specify the **Number of days** to move the schedule either forward or backward in time.
 - If you select **Date**, use the calendar to specify the new due date for the schedule.
5. Check **Run in Background** to have the schedule shifted in the background as you work. You are notified when the process completes.
6. Click **Shift** to shift the schedule.

Add or remove a schedule within a program, project, or subproject


As a program manager, you can add a schedule to, or remove a schedule from, a program, project, or subproject. Schedules provide additional levels of planning information to the program plan.


When you remove a schedule, the relationship between the schedule and the program, project, or subproject is removed, but it does not delete the schedule object from Teamcenter.



Add a schedule to a program, project, or subproject

1. Navigate to the program, project, or subproject in your folder structure or from the program timeline.
2. Select the desired program, project, or subproject.
3. Click the **Schedules** tab.

Note:


Select a layout from **Layout Manager**  to display details below the timeline, such as the **Schedules** tab.

4. Click **Add Schedule** .
5. In the **Add Schedule** panel, do one of the following.

To	Do
Search for an existing schedule.	<ol style="list-style-type: none"> a. Click the Search tab. b. Enter the search criteria and click .
Select a schedule that was previously copied to the paste buffer using Copy  .	<ol style="list-style-type: none"> a. Click the Palette tab. b. Select a schedule from the Clipboard section.
Select a favorite or recently viewed schedule.	<ol style="list-style-type: none"> a. Click the Palette tab. b. Select a schedule from the Favorites or Recent section.

6. Click **Add**.

Remove a schedule from a program, project, or subproject

1. Select the schedule you want to remove.
2. Click **Cut** .

9. Identifying program risks, issues, and opportunities

What are program risks, issues, and opportunities?

A risk, issue, or opportunity can be associated with, and relevant to, any part of the plan (program, project, subproject, or event). Raising risks, issues, and opportunities allows the program management team to formulate a strategy to lessen the impact of risks and issues, and capitalize on opportunities.

Note:

In the context of Program Planning, risks, issues, and opportunities are considered *program risks*, *program issues*, and *program opportunities*, irrespective of where they are associated on the actual plan. For example, you can create program risks on the program, on a project or subproject, or on an event. The name does not change based on the location it is associated with.

The following terms apply.

Program Risks

Future events that can impact the success of a program either through cost, schedule, or performance.

Program Issues

Risks that have occurred, are certain to occur, or issues specific to the plan level.

Program Opportunities

Potential future benefits that may affect the program's cost, schedule, or performance.

Add a program risk, issue, or opportunity to the plan

Program risks, issues, and opportunities provide a way for any team member to bring attention to situations that may negatively or positively affect a plan (program, project, subproject, or event) so that program management can affect an appropriate response to the situation. A program risk, issue, or opportunity can be created at any plan level and then added at multiple levels within the same plan or within a different plan. For example, Program Risk 1 can be added to Event A and then also added to Event B.


Note:


If your administrator has configured **Teamcenter project security**, the risk, issue, or opportunity will be assigned to the same Teamcenter Tc_project as the parent program.

1. Navigate to a program, project, or event in your folder structure or from the program timeline.

2. Select the desired program, project, or event.
3. Click either the **Risks**, **Issues**, or **Opportunities** tab, depending on what you want to create.




Note:

Select a layout from **Layout Manager**  to display details below the timeline, such as the **Risks**, **Issues**, or **Opportunities** tab.

4. Click **Add to** .
5. In the **Add** panel, do one of the following.


Note:

You are constrained to the appropriate object type based on which tab you selected. For example, if you selected the **Issues** tab you can only add a **Program Issue** object.

To	Do
Search for a program risk, issue, or opportunity.	<ol style="list-style-type: none"> a. Click the Search tab. b. Enter the search criteria and click .
Select a program risk, issue, or opportunity that was previously copied to the paste buffer using Copy  or Cut  .	<ol style="list-style-type: none"> a. Click the Palette tab. b. Select a program risk, issue, or opportunity from the Clipboard section.
Select a favorite or recently viewed program risk, issue, or opportunity.	<ol style="list-style-type: none"> a. Click the Palette tab. b. Select a program risk, issue, or opportunity from the Favorites or Recent section.
Add a new program risk, issue, or opportunity.	<ol style="list-style-type: none"> a. Click the New tab. b. Specify the Type for the program risk, issue, or opportunity. c. Enter the properties for the new program risk, issue, or opportunity.

To	Do
----	----

Tip:

If you want to add multiple risks, issues, or opportunities with the same or similar values, click **Pin Panel**  to keep the **Add** panel open.

6. Click **Add**.


Delete or remove a program risk, issue, or opportunity from a plan



You can *delete* a program risk, issue, or opportunity if the object was created in error. The delete action deletes the object from the Teamcenter database. You can *remove* (cut) a program risk, issue, or opportunity if you no longer want this object to be associated with the plan (program, project, subproject, or event). The cut action disassociates the program risk, issue, or opportunity with that particular plan location, but does not remove it from the Teamcenter database; the object can remain associated with a different location or with a different plan. For example, you can remove Program Risk 1 from Event A but leave it associated with Event B.


The following apply:

- Only the program risk, issue, or opportunity owner (the person who created it) can delete the object.
 - A program risk, issue, or opportunity cannot be deleted if it is associated with another area of the plan (or a different plan). For example, if a program risk is created on Event A and is also associated with Event B, the risk cannot be deleted from Event A until it is removed (cut) from Event B.
1. Navigate to a program, project, or event in your folder structure or from the program timeline.
 2. Select the desired program, project, or event.
 3. Click either the **Risks, Issues, or Opportunities** tab, depending on what you want to delete.

Note:

Select a layout from **Layout Manager**  to display details below the timeline, such as the **Risks, Issues, or Opportunities** tab.

4. Select a program risk, issue, or opportunity and do one of the following.
 - To delete an object, click **More Commands** **...** > **Edit**  > **Delete** . This deletes the object from the Teamcenter database.

- To cut an object, click **Cut** . This disassociates the object with this plan location and places the object on the clipboard.


Modify a program risk, issue, or opportunity

As work proceeds on a program risk, issue, or opportunity, a team member can update the object to reflect its current state.







Modify program risk, issue, or opportunity properties using commands


1. Navigate to a program, project, or event in your folder structure or from the program timeline.
2. Select the desired program, project, or event.
3. Click either the **Risks, Issues, or Opportunities** tab.

Note:




Select a layout from **Layout Manager**  to display details below the timeline, such as the **Risks, Issues, or Opportunities** tab.

4. Do one of the following.

To	Do
Modify a single program risk, issue, or opportunity.	<ol style="list-style-type: none"> a. Select an object from the list and click Open . b. Click More Commands ... > Edit  > Start Edit . c. Edit the properties. d. Click More Commands ... > Edit  > Save Edits .
Modify multiple program risks, issues, or opportunities.	<p>This display method enables you to update properties directly within the table. It's a convenient method to use to update properties on more than one object.</p> <ol style="list-style-type: none"> a. Select the Table display method. b. Using multiselect mode, select the projects from the list. c. Click Edit . d. Edit the properties in the table.

To	Do
	e. Click Save Edits  .



Modify program risk, issue or opportunity properties in the Information panel

1. Select an object from the list.
2. Click **Information** .
3. Click **Edit** .
4. Edit the properties.
5. Click **Save** .

Field definitions for program risks, issues, and opportunities

Program managers or project managers can modify the program risk, issues, and opportunities **Properties** values after the object is created and as work is completed.

Field name	Definition	Valid values
ID	Specifies a unique ID for this object.	
Type	Identifies this object as either a Risk, Issue, or Opportunity.	
Name	Uniquely identifies this program risk, issue, or opportunity.	
Description	Describes this program risk, issue, or opportunity (short description).	
State	Reflects the current status of the program risk, issue, or opportunity.	The out-of-the-box values are: In Progress Closed Canceled
Probability	Indicates the likelihood of the program risk or opportunity occurring. This value is used with the Impact value to calculate the Risk Score (Impact x Probability = Risk Score).	Enter a numerical value from 0 - 100.
Priority	Indicates the importance of the program issue.	The out-of-the-box values are: Critical High Medium

Field name	Definition	Valid values
		Low
Impact	Indicates the effect of the program risk or opportunity on the plan. Each value is associated with a number (5 - 1), which is used to calculate the Risk Score (Impact x Probability = Risk Score).	The out-of-the-box values are: Severe (5) Major (4) Moderate (3) Minor (2) Insignificant (1)
Risk / Opportunity Score	Indicates the probability score for the program risk or opportunity.	This value is system-calculated using the Impact and Probability values (Impact x Probability = Risk Score).
Risk Strategy	Identifies the plan of action for handling this program risk.	The out-of-the-box values are: Not Applicable Accept Avoid Mitigate Transfer
Opportunity Strategy	Identifies the plan of action for handling this program opportunity.	The out-of-the-box values are: Not Applicable Accept Enhance Exploit Share
Comments	Further defines or specifies the program risk or opportunity.	
Creation Date	Identifies the date that this program risk, issue, or opportunity was created.	This value is created by the system and cannot be modified.
Target Date	Identifies the date by which this program risk, issue, or opportunity is to be resolved.	Click in the field to select a date from the calendar.
Closed Date	Identifies the date by which this program risk, issue, or opportunity is to be completed and closed.	Click in the field to select a date from the calendar.
Responsible User	Identifies the Teamcenter user who has control over the outcome of this program risk, issue, or opportunity.	Select from all Teamcenter users.
Owner	Identifies the creator of this program risk, issue, or opportunity.	Use Change Owner  to modify this value.
Group ID	Identifies the assigned classification of this object.	Use Change Owner  to modify this value.

10. Managing programs using the Program Board

Using the Program Board

About the Program Board

The **Program Board** is an interactive view that allows you to quickly manage your programs, projects, subprojects, and their related objects, such as deliverables, issues, and risks. The board appears below the program **Timeline**.

The Program Board Process



Before you can view the **Program Board**, you must first set the context. This determines which program objects are displayed on the board.

You can choose from the following contexts:

Deliverables	Changes	Schedules
Risks	Issues	Opportunities
Criteria	Checklists	

Once you set the context, you can select programs, projects, subprojects, and events from the **Timeline** to finish setting up the **Program Board**. You can then **manage the program objects on the board** by dragging them between events or program plan levels. Each item also displays some data, such as the name, due date, and other information.



Note:

Dragging items on the **Program Board** functions the same as performing a cut and paste action.

Program Board example

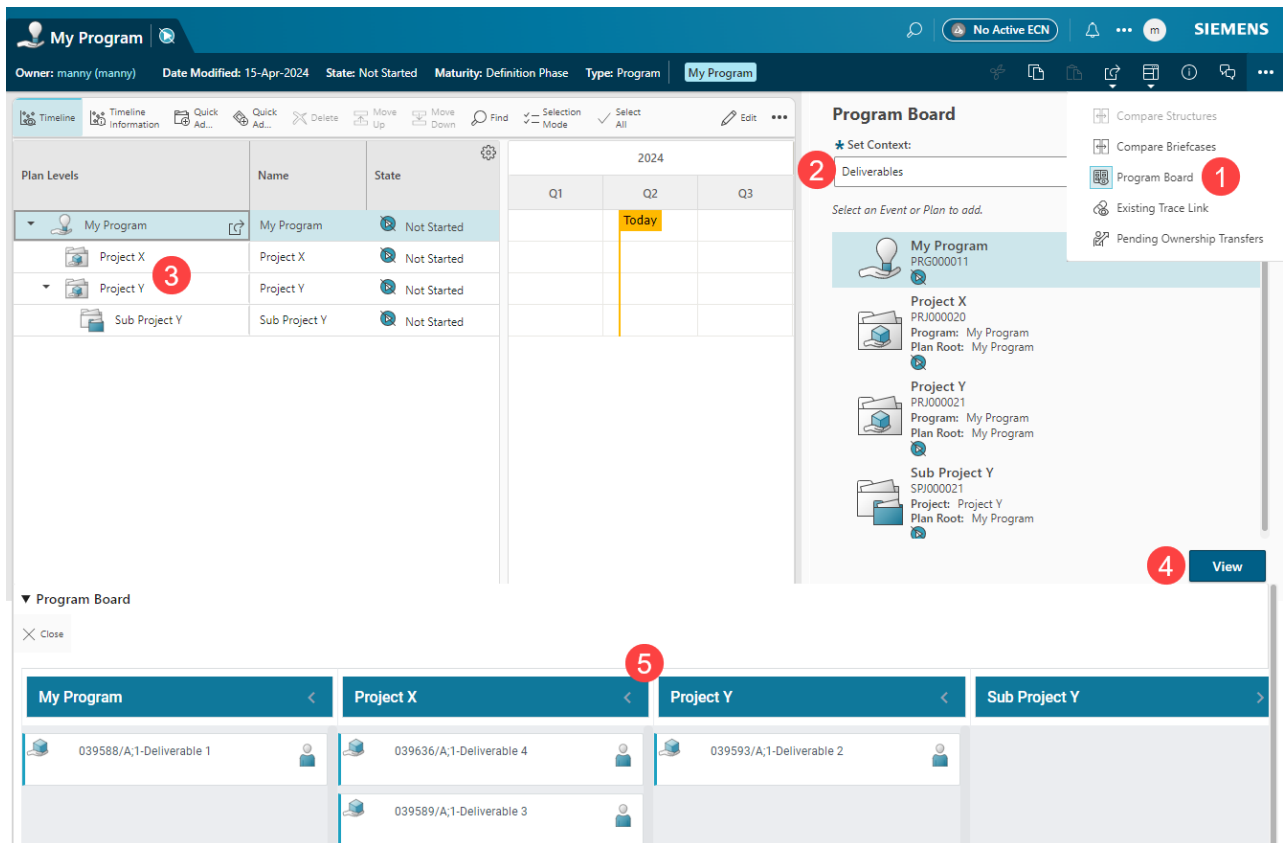
In the following example, you created a new program, with two projects, X and Y. Project Y also has a subproject. You want to move deliverables between the program and projects. Do the following (use the image as a reference):

Procedure

1. Click **More Commands ...** > **View**  > **Program Board** .

The **Program Board** panel opens.

2. Set the context, which in this example, is **Deliverables**.
3. Select the programs and projects from the **Timeline** that you want to see in the **Program Board** view.
4. Once all the items are added to the panel, click **View**.
5. The **Program Board** opens and you can now drag your deliverables as needed.



Manage program objects with the Program Board

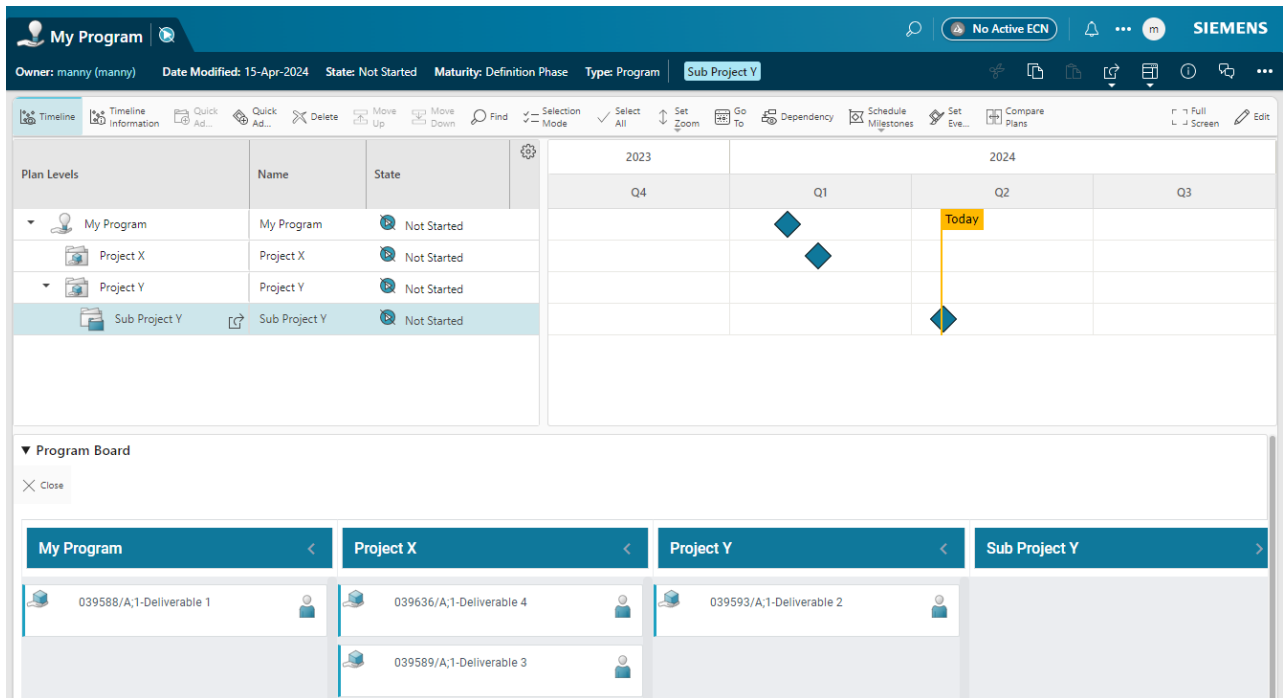
You can use the **Program Board** to quickly view and manage program objects, such as deliverables, risks, and dependencies, across plan levels and events. The board displays below the program **Timeline** and gives you a customizable and interactive graphical view of your program levels, events, and objects. Dragging items on the **Program Board** functions the same as performing a cut and paste action.





1. Search for a program, project, or subproject using the search box or navigate to the program, project, or subproject in your folder structure and then open it.
2. Click **More Commands** **...** > **View** > **Program Board** .

The **Program Board** panel opens.


3. From the **Set Context** list, select the context, such as deliverables, risks, or issues, to set which program objects display on the board.
4. From the **Timeline**, select the programs, projects, subprojects, and events that you want to display in the board view. As you select them, the objects appear in the **Program Board** panel.
5. Click **View**.

The **Program Board** opens below the timeline and displays the programs, projects, subprojects, or events you selected. The program objects, based on your chosen context setting, display under their associated object.



6. Drag the program objects to different programs, projects, subprojects, or events, as needed.
7. Click the **Close**  to close the **Program Board**.
8. (Optional) Click **More Commands**  > **View**  > **Program Board**  again, but choose a different context, such as risks, to manage other program objects.

Note:

You can click **Delete**  next to a program, project, subproject, or event displayed in the **Program Board** panel to remove it from the board view if you do not need it for a selected context.

Once you have finished managing your program objects, you can review the different plan levels or events and verify the objects are now in your desired location.

11. Using trace links with program objects

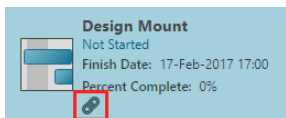
Use trace links to manage program objects

Use *trace links* to allocate requirements to program objects, such as programs, projects, events, and deliverables.

A trace link is a directional relationship conveyed by the terms *defining* (start) and *complying* (end). A defining object specifies a condition that a product or a component must fulfill. A complying object must partially or completely fulfill a condition specified by a defining object. Such a relationship establishes a traceable path in which one object precedes another.

Trace links can have a one-to-many relationship. For example, one program can be linked to several requirements or vice versa.

Objects that have associated trace links display the trace link icon as in the example, below:



Note:

When a change occurs in the linked requirement, the trace link icon turns red, indicating that the requirement has been modified.

Use the trace link functionality to do the following:

- Start a trace link on a requirement and end the trace link on a program object.
- Start a trace link on a program object end the trace link on a requirement.
- Generate and view traceability reports.

Create a trace link for a program object

As a program manager, you can create a trace link between program objects, such as programs, projects, events, and deliverables and a requirement. This can be a one-to-many relationship.

1. Navigate to the program object in your folder structure or from the program timeline.
2. Select the desired object.
3. Click **More Commands** ... > **New** ✨ > **Create Trace Link** 🔄.

The **Create Trace Link** panel is displayed and the open object is displayed in the **Start** position of the trace link.

- On the **Create Trace Link** panel, do the following.

To	Do
(Optional) Define the directional relationship.	Drag and drop the program object (or requirement after it is added) under Start or End .
Add the linking requirement.	<p>Click Add ⊕ under Start or End, depending on the desired directional relationship of the requirement, and do one of the following:</p> <ul style="list-style-type: none"> On the Search tab, search for a requirement. On the Palette tab, expand: <ul style="list-style-type: none"> Clipboard to select a requirement that was previously copied to the paste buffer using Copy 📄. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Note: If there is content in your past buffer, the Paste 📄 icon displays next to Start and End.</p> </div> <ul style="list-style-type: none"> Favorites or Recent to select a favorite or recently viewed requirement.
(Optional) Remove a requirement or task from the list.	Select the linking requirement and click Remove ⊖.

- In the **Type** box, select **Trace Link**.



- Click **Create**.



Review existing trace links

As a team member, you can review an object's existing trace link details to verify and access the requirements that comprise the trace link.

The trace link directionality is indicated by ↗ for defining and ↘ for complying.



- Navigate to the program object in your folder structure or from the program timeline.

2. Select the desired object.
3. Click **More Commands ...** > **View**  > **Existing Trace Link** .
4. On the **Existing Trace Link** panel, review the existing trace link relationships.
5. (Optional) Do one of the following.

To	Do
Remove a trace link.	Click Remove  .
Open a trace link.	Click Open  .

Generate a traceability report

As a team member, you can generate a traceability report in Excel to review the details of the trace links associated with the selected object.

1. Navigate to the program object in your folder structure or from the program timeline.
2. Select the desired object.
3. Click **More Commands ...** > **New**  > **Generate Report** .
4. On the **Generate Report** panel, select the **TL Complying and Defining Report**.
5. Under Format, select the desired style sheet, either **REQ_TraceLink_complying_template** or **REQ_TraceLink_defining_template**.
6. Click **Generate**.
7. To open the report in Excel, click **Open** on the message that displays.