



TEAMCENTER

Partner Connect — Usage

Teamcenter 2412

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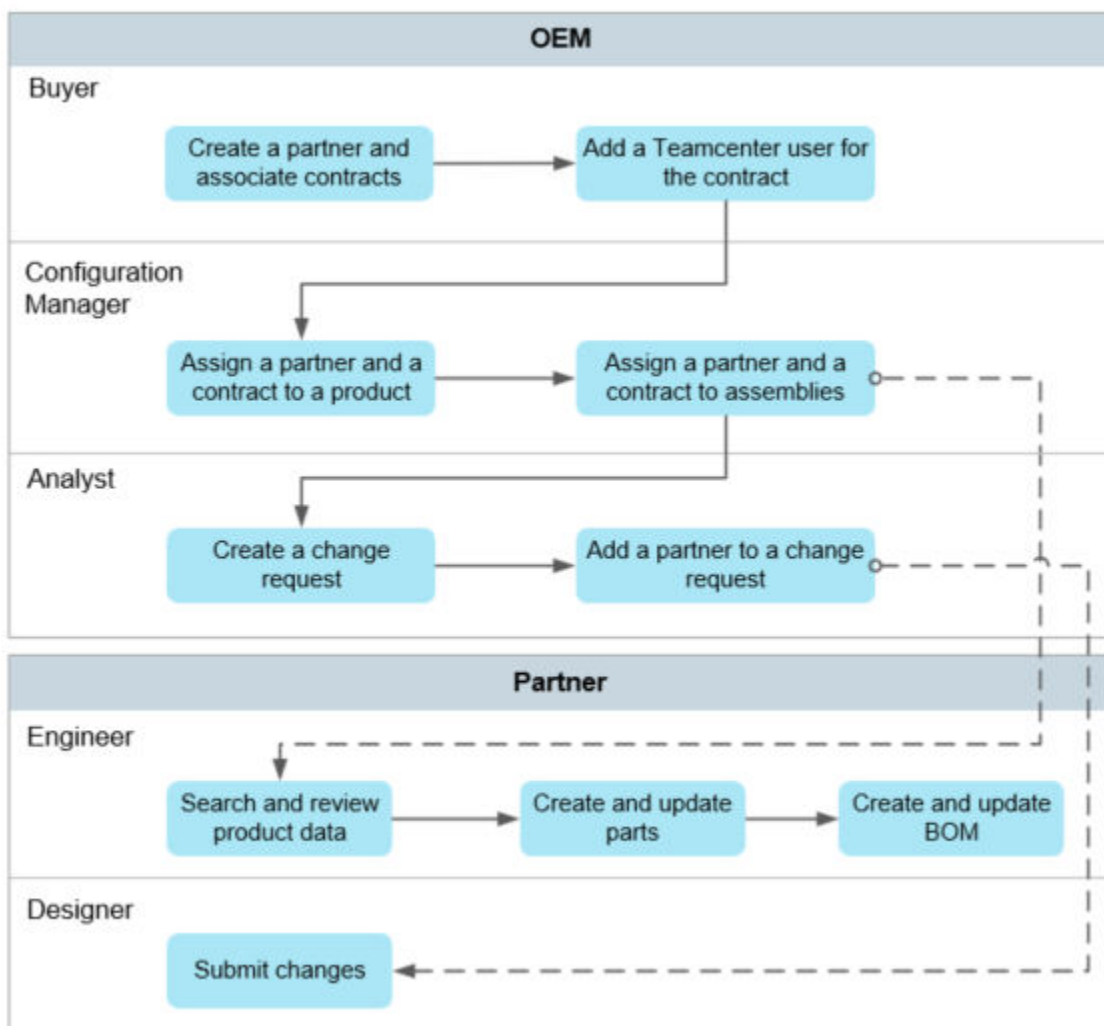
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1. About Partner Connect

Companies looking to reduce cost and overheads rely on outsourcing. One of the business models that companies rely on when outsourcing is referred to as Contract Manufacturing. This is when a company partners with a manufacturer to deliver an entire product or significant parts of the product. The company owns the product design, while the manufacturing partner is responsible to deliver the finished goods based on contractual obligations. This process requires tight collaboration between the company and the *partner* to exchange product data, manage changes, and track related documentation. Partner Connect helps companies, especially OEMs, work closely with their partners in an integrated Teamcenter environment.

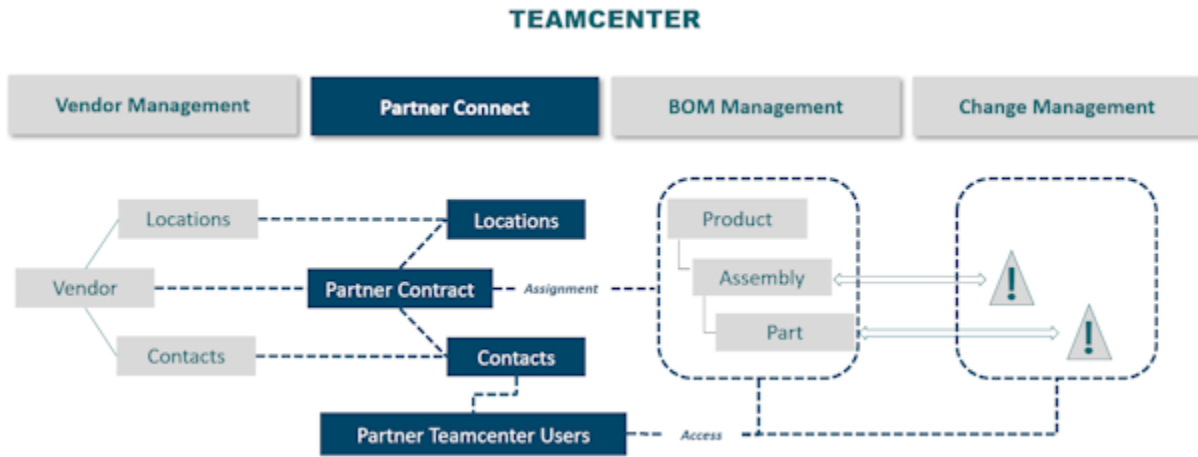
The Partner Connect process flow is as follows:



Using Partner Connect, a company can enable its partners to log on to their Teamcenter environment and access only information that is relevant to the products that they are working on. The access is controlled by using a partner contract, which allows a company to set time-bound access to specific product information in Teamcenter. In the case of a company working with multiple partners, the

partner contract also limits one partner from viewing information assigned to or managed by another partner.

The role of Partner Connect in Teamcenter is as follows:



2. Create a partner and assign a contract

To create a partner in Teamcenter, you designate a vendor as one. For this, you can either **designate an existing vendor as a partner** or create a new vendor for this as follows:

1. Navigate to and open the folder where you want to create a vendor, for example, your **Newstuff** folder.
2. Choose **More commands ...** > **New** ✨ > **Create Vendor**.
3. In the **Create Vendor** panel, select **Vendor**.
4. In the **Properties** section of the **Create Vendor** panel, enter the required vendor properties.
5. In the **Locations** section, click **Add** ⊕, and select **Company Location**.
6. Enter the required location properties and click **Add**.
7. Repeat the above steps until you complete adding the required locations.
8. In the **Contacts** section, click **Add** ⊕, and select **Company Contact**.
9. Enter the required company contact properties and click **Add**.
10. Repeat the above steps until you complete adding the required company contacts.
11. In the **Partner Contracts** section, click **Add** ⊕.
12. Specify the **ID** and **Revision** for the partner contract or accept the default values.

Create Vendor Reset Close

← Add Partner Contract

← Partner Contract

▼ Properties

* ID:

* Revision:

* Name:

Description:

* Start Date:

* End Date:

▼ Partner Details


Locations:

* Contacts:

13. Specify a **Name** and **Description** for the partner contract.
14. Specify the period when the partner's contract is valid in the **Start Date** and **End Date** fields.
15. From the **Locations** list, select or type the location to be assigned to the partner contract.
16. In the **Contacts** list of the **Partner Details** section, select or type the company contact to be assigned to the partner contract.

If you have selected a location, only company contacts from the location are available for selection.
If you have not selected a location, all company contacts are available for selection.

17. Click **Add**.
18. Click **Create Vendor**.

While creating a new vendor, if you add a partner contract and create the vendor, the partner contract's status is **Created** . After the vendor is approved, you must **assign a Teamcenter user to a partner representative** and then **submit the partner contract to the Partner Contract Qualification workflow** for review and approval.

2. Create a partner and assign a contract

3. Designate an existing vendor as a partner

To create a partner in Teamcenter, you designate a vendor as one. For this, you can either **create a new vendor** or designate an existing vendor as a partner through the following actions:

1. Navigate to and open the folder where you have created the vendor, for example, your **Newstuff** folder.
2. Select and open the vendor.
3. Click the **Partner Contracts** tab.
4. From the **Work area** toolbar, click **Add** ⊕.
5. Specify the **ID** and **Revision** for the partner contract or accept the default values.
6. Specify a **Name** and **Description** for the partner contract.
7. Specify the period for which the partner contract is valid in the **Start Date** and **End Date** fields.

Add Close

Partner Contract

▼ Properties

* ID:

* Revision:

* Name:

Description:

* Start Date:

* End Date:

▼ Partner Details

Locations:


* Contacts:

Add

8. From the **Locations** list, select or type the location to be assigned to the partner contract.
9. From the **Contacts** list of the **Partner Details** section, select or type the company contact to be assigned to the partner contract.

If you have selected a location, only company contacts from the location are available for selection. If you have not selected a location, all company contacts are available for selection.

10. Click **Add**.

In an approved existing vendor, the partner contract is automatically submitted for review and approval through the **Partner Contract Qualification** workflow. The status of the contract is updated to **Approval Pending** , and a signoff task is created in **My Tasks**. Now, you must **assign a Teamcenter user to a partner representative** and then **review and approve the partner contract**.

3. Designate an existing vendor as a partner

4. Assign a Teamcenter user account to a partner representative


The representative of the partner assigned to the contract must be able to log on and access their assigned product and part data. To enable this, you must assign a Teamcenter user account to the partner representative.


Note:

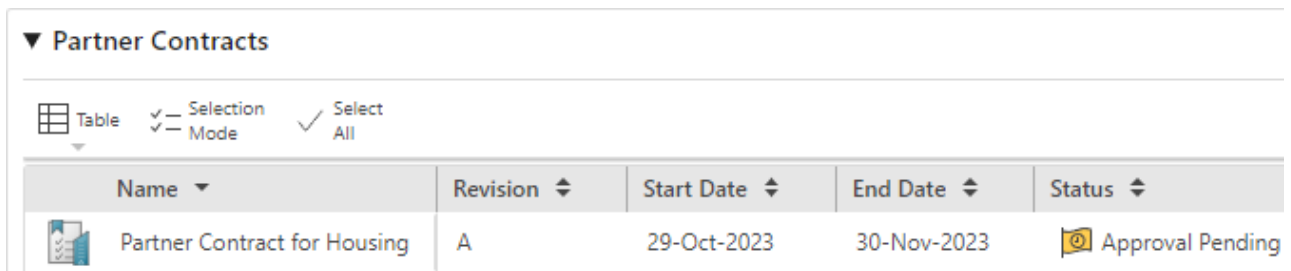
After completing the assignment, share the assigned Teamcenter user account's credentials with the partner representative.



The partner representative can then log on by using this Teamcenter user account's credentials and work on the assigned product and part data.

To assign a Teamcenter user account to a partner representative, do the following:

1. Navigate to and open the folder where you created the partner, for example, your **Newstuff** folder.
2. Select and open the partner.
3. Click the **Partner Contracts** tab.
4. Select and open a partner contract whose status is **Approval Pending** .

For example, the **Partner Contract for Housing** partner contract's status is **Approval Pending** .



Name	Revision	Start Date	End Date	Status
 Partner Contract for Housing	A	29-Oct-2023	30-Nov-2023	 Approval Pending

5. In the **Company Contacts** section, select the partner representative to provide access.
6. Choose **More commands** **>>>** **Manage** **>** **Add Partner User**.
7. In the **Add Partner User** panel, search for and select the required Teamcenter user account.

Caution:

You can assign a Teamcenter user account to only one partner representative at a time.

8. Click **Add**.

After assigning a Teamcenter user account, you must **review and approve the partner contract**.

9. To assign another Teamcenter user account to the partner representative, you must first remove the existing Teamcenter user account as follows:
 - a. Choose **More commands ... > Manage > Remove Partner User**.
 - b. In the confirmation dialog box, click **Remove**.

5. Activate a company contact

After you create a company contact and **assign a partner user to it**, you must activate it to make it available. Submit the company contact to the **Activate Company Contact** workflow to activate it. Now, the assigned partner user can log on to Teamcenter.

Note:

You can activate a company contact only if it is associated with an approved vendor.

1. Log on as a user with **DBA** privileges.
2. Navigate to and open the folder where you have created the vendor, for example, your **Newstuff** folder.
3. Select and open the vendor.
4. In the **Overview** tab, in the **Company Contacts** section, select and open the required company contact.
5. Choose **More commands ... > Manage > Submit to Workflow**.
6. From the **Template** list, select **Activate Company Contact**, and click **Submit**.

Submit to Workflow

Reset
✕ Close

Workflow
Assignments

All Assigned

Template:

Activate Company Contact ▼

* Name:

Activate Company Contact : Cathy

Description:

▼ Targets

+ Add

 Select All

Cathy

Cathy

Company: Best Parts

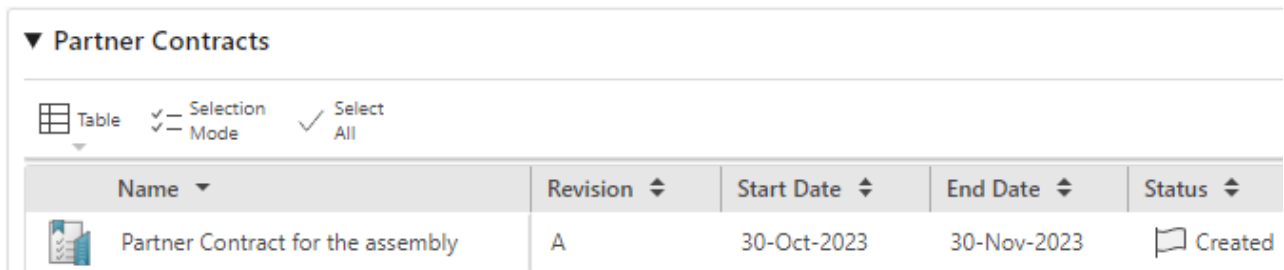
Submit

7. In the **INBOX** tile, select the **select-signoff-team** task, enter your comments in the **Comments** box, and click **Complete**.
8. In the **INBOX** tile, select the **perform signoffs** task, and click **Approve**.

The company contact's **Partner User Status** is updated to **0** to indicate that the company contact is active.

6. Submit a partner contract for approval

1. Navigate to and open the folder where you created the partner, for example, your **Newstuff** folder.
2. Select and open the partner.
3. Click the **Partner Contracts** tab.
4. Select the partner contract that you want to submit for approval.



The screenshot shows a software interface for managing partner contracts. At the top, there is a section titled "Partner Contracts" with a dropdown arrow. Below this, there are three icons: a table icon labeled "Table", a checkmark icon labeled "Selection Mode", and a checkmark icon labeled "Select All". Below these icons is a table with the following columns: "Name", "Revision", "Start Date", "End Date", and "Status". The table contains one row with the following data: "Partner Contract for the assembly", "A", "30-Oct-2023", "30-Nov-2023", and "Created".

Name	Revision	Start Date	End Date	Status
Partner Contract for the assembly	A	30-Oct-2023	30-Nov-2023	Created

5. Choose **More commands ... > Manage > Submit to Workflow**.
6. From the **Template** list, select **Partner Contract Qualification**, and click **Submit**.

Submit to Workflow Reset Close

Workflow **Assignments**

All Assigned


Template:
Partner Contract Qualification

* Name:
Partner Contract Qualification : 028940/A;1-Partner Contract for the assembly

Description:

▼ **Targets**

Add Select All



Partner Contract for the a...
028940
Revision: A
Vendor: Best Parts

Submit



7. Review and approve a partner contract

1. In the **INBOX** tile, select the **perform signoffs** task for the required partner contract.
2. In the **Overview** tab, click **Approve** to approve the partner contract.

The partner contract's status is updated to **Approved**  in the **Partner Contract** tab of the partner.

▼ Partner Contracts

Table Selection Mode Select All

Name ▼	Revision ⇅	Start Date ⇅	End Date ⇅	Status ⇅
 Partner Contract for the assembly	A	30-Oct-2023	30-Nov-2023	 Approved

8. Edit a partner contract to change the validity, add or remove suppliers, and add or remove locations

You can edit a partner contract only if the following prerequisites are met:

- The **External Data** ACL is installed.
- The partner contract is approved.

To edit a partner contract:

1. Navigate to and open the folder where you created the partner, for example, your **Newstuff** folder.
2. Select and open the partner.
3. Click the **Partner Contracts** tab.
4. Select an approved partner contract that you want to edit.
5. Choose **More commands** **...** > **New** ✨ > **Revise**.
6. Enter the properties for the new revision and click **Save**.

The partner contract's revision is created and displayed in edit mode.











7. Make the required edits in the partner contract, and choose **More commands** **...** > **Edit** > **Save Edits**.

The partner contract's status is **Created** 📄. Now, you must **submit the partner contract to the Partner Contract Qualification workflow** for review and approval. When you create a new revision, the earlier partner contract revision's status is updated to **Obsolete** 🗑️.

9. Assign a partner contract to a configured assembly or subassembly

1. Create the required variant rules in Teamcenter Structure Manager.
2. Apply a variant rule to the required assembly or subassemblies in the assembly to display the required child items.

For example, you have a Baseplate Assembly where you have not applied any variant rules are follows:

Element Name	ID	Revision	Revision Name	
 Baseplate Assembly	HDD-0507	A	Baseplate Assembly	
 Magnet Frame Lower	HDD-0523	A	Magnet Frame Lower	
 Magnet	HDD-0552	A	Magnet	
 Lock Gimbal	HDD-0502	A	Lock Gimbal	
 Gasket Feedthrough	HDD-0547	A	Gasket Feedthrough	
 Motor Electronics Assembly	HDD-0522	A	Motor Electronics Assembly	
 Lock Actuator Gimbal	HDD-0541	A	Lock Actuator Gimbal	
 Base Plate	HDD-0554	A	Base Plate	
 Magnet	HDD-0552	A	Magnet	
 Magnet Frame Upper	HDD-0556	A	Magnet Frame Upper	

When you apply the variant rule to display the required child items, the Baseplate Assembly now displays as follows:

Element Name	ID	Revision	Revision Name
Baseplate Assembly	HDD-0507	A	Baseplate Assembly
Magnet Frame Lower	HDD-0523	A	Magnet Frame Lower
Magnet	HDD-0552	A	Magnet
Lock Gimbal	HDD-0502	A	Lock Gimbal
Gasket Feedthrough	HDD-0547	A	Gasket Feedthrough
Lock Actuator Gimbal	HDD-0541	A	Lock Actuator Gimbal
Base Plate	HDD-0554	A	Base Plate
Magnet	HDD-0552	A	Magnet
Magnet Frame Upper	HDD-0556	A	Magnet Frame Upper

The Motor Electronics Assembly is removed from the Baseplate Assembly when you apply the variant rule.

3. After applying the required variant rule, create a saved working context as follows:
 - a. Choose **More commands** \dots > **New** \star > **Working Context**.
 - b. From the type of working context list, select **Save Working Context**.
 - c. In the **Save Working Context** pane, enter a name and a description.
 - d. Select the **Allow others to view** check box to grant read access to other users.
 - e. Click **Save As**.
4. In this saved working context, assign a partner contract as follows.
 - a. Select one or more required assembly or subassemblies in the assembly.
 - b. In the right pane, click the **Partners** tab.
 - c. Click **Add Partner**.
 - d. In the **Add Partner** panel, select the partner from the **Vendor** list.

This list displays only approved vendors who are partners.

- e. From the **Partner Contract** list, select the applicable contract.












The screenshot shows the 'Add Partner' dialog box. At the top, there is a title bar with the text 'Add Partner' and two buttons: 'Reset' and 'Close'. Below the title bar, there is a section titled 'Partner Contract' with a downward arrow. Under this section, there are three dropdown menus: 'Vendor' with the value '028939-Best Parts', 'Partner Contract' with the value '028940/A;1-Partner Contract for the assembly', and 'Preferred Status' with the value 'Assigned'. Below these dropdowns, there are three checkboxes: 'All Levels', 'Notify Partner', and 'Run in background'. At the bottom right of the dialog, there is a blue button labeled 'Add'.

This list displays only approved and active partner contracts that are available for the selected assembly or subassemblies in the assembly. If a partner contract is already assigned to the selected assembly or subassemblies in the assembly, it does not appear in this list.

- f. From the **Preferred Status** list, select the type of preference to assign to the partner contract.
- g. To assign the partner contract to all child items in the selected assembly or subassemblies in the assembly, select **All Levels**.
- h. To send a notification email to the company contacts assigned to the partner contract, select **Notify Partner**.
- i. (Optional) Select **Run in Background** to continue working while the partner contract is assigned to the selected assembly or subassemblies in the assembly.
- j. Click **Add**.

9. Assign a partner contract to a configured assembly or subassembly

When the partner representative logs on and views the assigned parts, assembly, or subassemblies in the assembly, they can view only those child items where they have access. Inaccessible child items are indicated by **UNREADABLE** in the assembly.

Element Name	ID	Revision	Revision Name	
  Baseplate Assembly	HDD-0507	A	Baseplate Assembly	
 Magnet Frame Lower	HDD-0523	A	Magnet Frame Lower	
 Magnet	HDD-0552	A	Magnet	
 Lock Gimbal	HDD-0502	A	Lock Gimbal	
 Gasket Feedthrough	HDD-0547	A	Gasket Feedthrough	
 <<UNREADABLE>>				
 Lock Actuator Gimbal	HDD-0541	A	Lock Actuator Gimbal	
 Magnet	HDD-0552	A	Magnet	
 Magnet Frame Upper	HDD-0556	A	Magnet Frame Upper	

10. Assign a partner contract to a part or an unconfigured assembly or subassembly

1. Navigate to, open the required product, and select one or more required parts, assembly, or subassemblies in the assembly.
2. In the right pane, click the **Partners** tab.
3. Click **Add Partner**.
4. In the **Add Partner** panel, select the partner from the **Vendor** list.

This list displays only approved vendors who are partners.

5. From the **Partner Contract** list, select the applicable contract.

Add Partner Reset Close

▼ Partner Contract

* Vendor:
028939-Best Parts ▼

* Partner Contract:
028940/A;1-Partner Contract for the assembly ▼

Preferred Status:
Assigned ▼

All Levels

Notify Partner

Run in background

Add

This list displays only approved and active partner contracts that are available for the selected parts, assembly, or subassemblies in the assembly. If a partner contract is already assigned to the selected parts, assembly, or subassemblies in the assembly, it does not appear in this list.

6. From the **Preferred Status** list, select the type of preference to assign to the partner contract.
7. If you try assigning the partner contract to an unconfigured assembly or subassemblies in the assembly, you receive a warning. Click **Assign** in the warning to proceed with the assignment.
8. To assign the partner contract to all child items in the selected assembly or subassemblies in the assembly, select **All Levels**.
9. To send a notification email to the company contacts assigned to the partner contract, select **Notify Partner**.
10. (Optional) Select **Run in Background** to continue working while the partner contract is assigned to the selected parts, assembly, or subassemblies in the assembly.
11. Click **Add**.

11. Manually assign partner contracts to vendor parts

When you assign a partner contract to an assembly, by default, it is assigned to its child items, subassemblies, and commercial parts. However, you can manually assign the partner contract to the vendor parts in the commercial part depending on the settings configured for your site. If you are unable to manually assign the partner contract to vendor parts, contact your administrator.

To manually assign a partner contract to the vendor parts in a commercial part, do the following:

1. Open the required product, and select the required assembly or subassembly that contains the commercial part.
2. In the right pane, click the **Partners** tab and open the partner contract.
3. In the partner contract, click the **Assignments** tab.
4. In the **Assigned Vendor Parts** section, click **Add to**.
5. In the **Add** panel, from the **Product** list, select the commercial part that contains the associated vendor parts.


The associated vendor parts are displayed.

6. Select the required vendor parts and click **Add**.

The selected vendor parts appear in the **Assigned Vendor Parts** section.

Overview Assignments





▼ ASSIGNED PRODUCTS

Name	Configuration	Description
 027107/A;1-Platter Assembly		

▼ ASSIGNED VENDOR PARTS

Selection Mode
 Select All

 Export To...
  Paste
  Add to

Vendor Part Name ▼	ID ◆	Vendor ◆ 
 Retainer	027112	027096-Goodparts
 Platter Armature	027110	027096-Goodparts
 Motor Core	027111	027096-Goodparts

12. Revoke the partner's access from a part, assembly, or subassembly

To revoke the partner's access, you must remove the partner contract from the required part, assembly, or subassembly in the assembly.

1. Navigate to, open the required product, and select the required part, assembly, or subassembly in the assembly.
2. In the right pane, click the **Partners** tab.
3. Select the required contract and click **Remove**.
4. In the **Remove Partners** panel, to remove the partner contract from all child items in the selected assembly or subassembly, select **All Levels**.
5. To send a notification email to the assigned company contacts about the removal, select **Notify Partner**.
6. (Optional) Select **Run in Background** to continue working while the partner contract is removed from the selected assembly or subassembly.

12. Revoke the partner's access from a part, assembly, or subassembly

13. Track changes to partner contract assignments in a change notice

In a change notice, when you assign or remove partner contracts from the parent part of an assembly, these changes are displayed as follows:

- Deleted partner contracts are highlighted with red strike-through.
- Added partner contracts are highlighted in green and are italicized.

Caution:

These changes are displayed only when you modify the partner contracts from the parent part of an assembly.

You can track these changes to partner contracts in the following scenario:

1. Assign a partner contract to the parent part of the assembly and create a change notice for the parent part.
2. Open the change notice and click the **Affected Items** tab.
3. In this tab, select the assembly in the **Problem Items** section and revise it to create a solution item for the change notice.
4. Open the solution item and click the **Partners** tab to view the existing assigned partner contracts.
5. Add a new partner contract or remove an existing assigned partner contract.

The changes in the partner contract assignments are displayed in the **Partners** tab.

▼ **Partners**

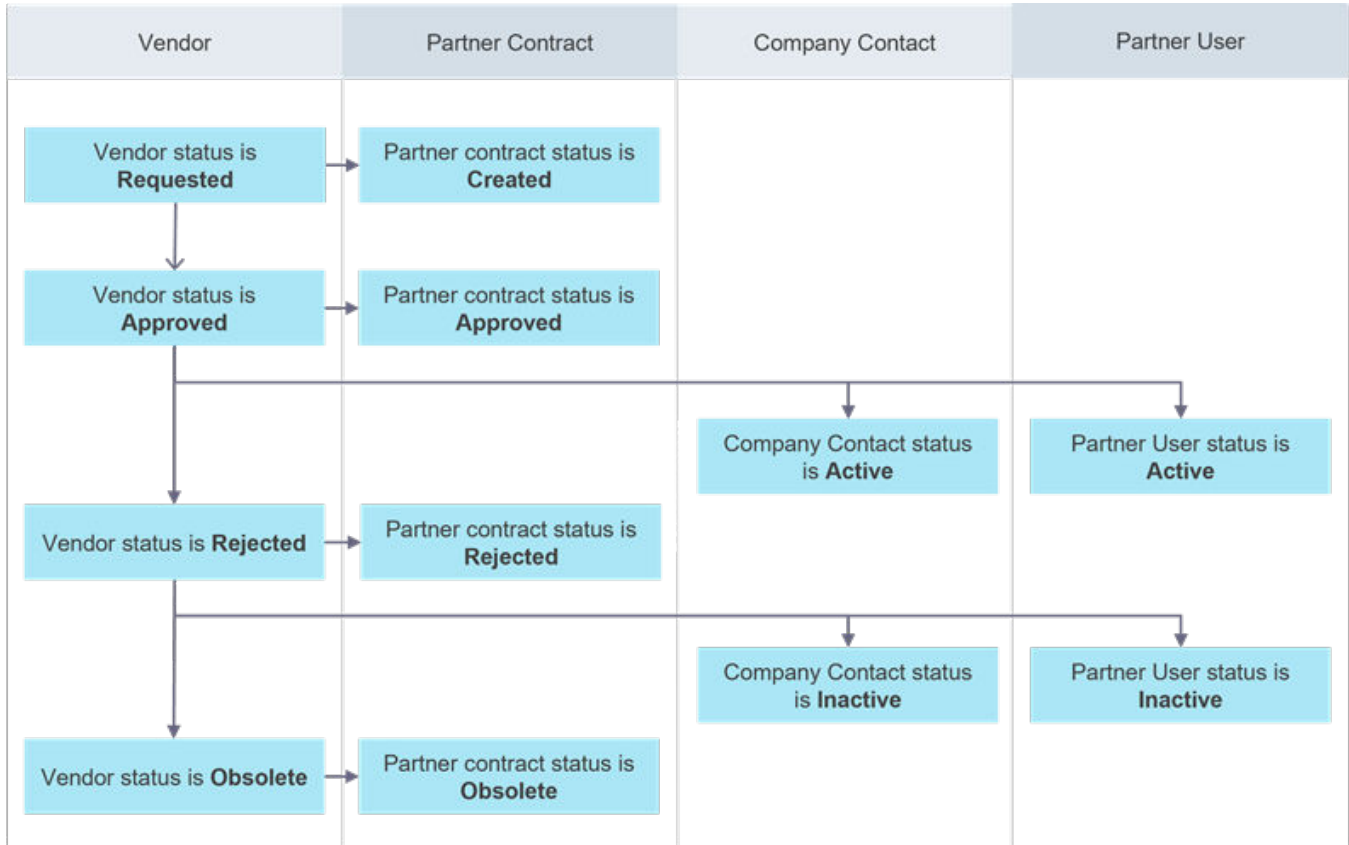
Partner	Partner Contract	Configuration
 <i>028939-Best Parts</i>	028940/A;1-Partner Contract for the assembly	028962/B;1-Mobile
 <i>041413-Pneumatic Control ...</i>	041414/A;1-Pneumatic Control System PC	028962/B;1-Mobile
 028936-Bestparts	028938/A;1-Partner Contract for Housing	

If the change notice is released, these changes are not visible by default. Choose **More commands** **...** > **View** > **Show Redlines** to display the changes.

14. Managing the vendor lifecycle

Impact of the vendor lifecycle on its associated objects

When the status of the vendor changes, the statuses of its associated objects are also updated to ensure that their statuses are in sync. This ensures data security for OEMs. A vendor's associated objects are company contacts, partner users, and partner contracts.



Retire a partner contract

If you want to discontinue a particular partner contract, you must first retire it, and then delete it. You cannot retire a vendor if the vendor has approved partner contracts.

1. Navigate to and open the folder where you created the partner, for example, your **Newstuff** folder.
2. Select and open the partner.
3. Click the **Partner Contracts** tab.
4. Select a partner contract that you want to retire.

- Choose **More commands ... > Manage > Submit to Workflow**.
- From the **Template** list, select **Retire Partner Contract**, and click **Submit**.

Submit to Workflow Reset Close

Workflow Assignments

All Assigned

Template:
Partner Contract Qualification

* Name:
Partner Contract Qualification : 028938/A;1-Partner Contract for Housing

Description:

▼ Targets

Select All

Partner Contract for Housing
028938
Revision: A
Vendor: Bestparts

Submit

The partner contract's status is updated to **Obsolete** . The partner users no longer have access to the data that was available through the partner contract.

- To delete the retired obsolete partner contract, select it and do the following:

- a. Choose **More commands ... > Edit > Delete**.
- b. In the confirmation dialog box, click **Delete**.

Deactivate a company contact

If a company contact is no longer working for the vendor, you must deactivate it to remove its access. Submit the company contact to the **Deactivate Company Contact** workflow to deactivate it. Now, the company contact cannot log on to Teamcenter.

1. Log on as a user with **DBA** privileges.
2. Navigate to and open the folder where you have created the vendor, for example, your **Newstuff** folder.
3. Select and open the vendor.
4. In the **Overview** tab, in the **Company Contacts** section, select and open the required company contact.
5. Choose **More commands ... > Manage > Submit to Workflow**.
6. From the **Template** list, select **Deactivate Company Contact**, and click **Submit**.

Submit to Workflow
Reset × Close

Workflow Assignments

All Assigned


Template:
Deactivate Company Contact ▼

* Name:
Deactivate Company Contact : Alice

Description:

▼ Targets

⊕ Add ✓ Select All



Alice
Alice
Company: Bestparts

Submit

7. In the **INBOX** tile, select the **select-signoff-team** task, enter your comments in the **Comments** box, and click **Complete**.
8. In the **INBOX** tile, select the **perform signoffs** task, and click **Approve**.

The company contact's **Partner User Status** is updated to **1** to indicate that the company contact is deactivated. Now, the company contact cannot log on to Teamcenter.

Retire a vendor

If a vendor no longer manufactures the parts that you require, you must retire it. Submit the vendor to the **Retire Vendor** workflow to retire it.

Note:

You can retire vendors only if they do not have any approved partner contracts.

If the vendor has partner contracts that are in any status except **Approved**, then these partner contracts are obsoleted by default when you retire a vendor.

1. Log on as a user with **DBA** privileges.
2. Navigate to and open the folder where you have created the vendor, for example, your **Newstuff** folder.
3. Select and open the vendor.
4. Choose **More commands ... > Manage > Submit to Workflow**.
5. From the **Template** list, select **Retire Vendor**, and click **Submit**.

Submit to Workflow

Reset
Close

Workflow Assignments

All Assigned

Template:

Retire Vendor


* Name:

Retire Vendor : 028939-Best Parts

Description:

▼ Targets

 Select All



Best Parts

028939

Submit

6. In the **INBOX** tile, select the **select-signoff-team** task, enter your comments in the **Comments** box, and click **Complete**.
7. In the **INBOX** tile, select the **perform signoffs** task, and click **Approve**.

The vendor's **Registration Status** is updated to **Obsolete** to indicate that the vendor is retired. The associated company contacts are deactivated.