

Configuring the 3DSearch and 6WTags Default Display

This section describes how to use the 3DSearch Control Center app to configure the 3DSearch and the 6WTags main features behavior.

Important: When you update the default view from the 3DSearch Control Center app, changes apply to the 3DSearch "desktop" resolution (screen width above 700 px) only. They do not apply to the "mobile" resolution (screen width below 700 px).

This task shows you how to:

- [Configure the Search Parameters Default Behavior](#)
- [Import and Export the 3DSearch and 6WTags Configuration](#)
- [Change the Selected Tenant](#)

Configure the Search Parameters Default Behavior


Before you begin:
To start the 3DSearch Control Center app, you must have:

- The Collaborative Industry Innovator (CSV) license.
- The **Platform Administrator** responsibility.

1. Open the **Platform Management** dashboard.
2. Select the **Search** tab.






The tab embeds the 3DSearch Control Center app. It provides you with centralized access to customize the behaviors of 3DSearch and 6WTags, for all users on the selected tenant.

3. Configure the properties as required. See the following tables.

Table 1.  **General-** These properties control the behavior of all generic parameters available in 3DSearch and 6WTags.

Property	Description
Default results view mode	<div>Defines the default view mode for searched objects. This mode can be: Thumbnail View, Tile View, or Datagrid View. The default view is the Tile View.</div> <div>Important: For users, the default view mode selected only displays when they do</div>

Property	Description
	<p>not have another view mode stored in their cache (which can be a previous default mode, or their own previous view selection). They must empty their cache to see the new default view mode.</p>
Recent content availability	<p>Defines the time limit for the user to access modified content in the search window. See Using My Recent Content. The default value is 5 minutes.</p>
Display date format	<p>Defines the default date display format:</p> <ul style="list-style-type: none"> ◦ Based on language preferences (default mode) ◦ YYYY-MM-DD 24h format ◦ MM/DD/YYYY 12h format ◦ DD/MM/YYYY 24h format ◦ Mon DAY, YYYY 24h format (for example, Jan 12, 2018 13:30:41) <p>Note: This choice:</p> <ul style="list-style-type: none"> ◦ Applies to all contexts using 3DSearch (desktop apps, 3DDashboard, 3DSwym, etc.) ◦ Has no impact on dates displayed in 6WTags and Advanced Search.
CSV separator	<p>Defines the default separator to use for the export of search results in CSV. By default, 3DSearch uses the comma separator.</p> <p>The end user can choose between comma, semicolon, or apply the administrator's preferences.</p>
Search result revisions	<p>Defines which search result revisions you want to display. Objects may have many revisions and displaying all of them in the search results may clutter the UI with many irrelevant objects. You can therefore choose to reduce the number of revisions to display.</p> <ul style="list-style-type: none"> ◦ All revisions: Retrieves all BO result revisions. This is the default view. ◦ Latest : Displays the latest revision only. This mode is available for 3D Space data and for objects supporting major and minor revisioning.

Property	Description																														
	<p>For example, with the following revisions, you see the revision in bold only.</p> <table><tr><td>Object</td><td>Part.000</td><td>Part.001</td><td>Part.002</td><td>Part.003</td></tr><tr><td>Revision</td><td>000</td><td>001</td><td>002</td><td>003</td></tr><tr><td>State</td><td>State1</td><td>State1</td><td>State1</td><td>State1</td></tr></table> <ul style="list-style-type: none">◦ Latest Per State: Retrieves only the latest revision major and or minor revision for each available state. <p>For example, with the following states and minor revisions, you see the revisions in bold only.</p> <table><tr><td>Object</td><td>Part.000</td><td>Part.001</td><td>Part.002</td><td>Part.003</td></tr><tr><td>Revision</td><td>000</td><td>001</td><td>002</td><td>003</td></tr><tr><td>State</td><td>State1</td><td>State1</td><td>State3</td><td>State2</td></tr></table> <div><p>Important: The Search result revisions feature does not work for:</p><ul style="list-style-type: none">◦ Data that is not indexed yet. Therefore, it does not work for My Recent Content because data is not indexed in that context.◦ Existing data, until reindexed (either manually by the administrator, or because of data modification).◦ A new branch in your 3DDashboard created with the branching feature.</div>	Object	Part.000	Part.001	Part.002	Part.003	Revision	000	001	002	003	State	State1	State1	State1	State1	Object	Part.000	Part.001	Part.002	Part.003	Revision	000	001	002	003	State	State1	State1	State3	State2
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State	State1	State1	State1	State1																											
Object	Part.000	Part.001	Part.002	Part.003																											
Revision	000	001	002	003																											
State	State1	State1	State3	State2																											
Number of results	<p>Specifies the number of search results to display and use for the  Export and  Select all actions, in the Actions  menu.</p> <p>By default, 3DSearch shows the 200 first elements.</p> <p>Therefore, when the user clicks  Export or  Select all, only the 200 first elements are selected. You can specify a predefined value, from 200 to 1000 results.</p> <p>Notes:</p> <ul style="list-style-type: none">◦ 1000 results is the maximum number that you can specify. This is to protect the server and because 3DSearch is not a tool designed to export everything. Be aware that increasing the maximum number of results may have a																														

Property	Description
	<p>huge impact on performance. It can take up to 15 or 20 seconds, if your network is not performant enough.</p> <ul style="list-style-type: none"> ◦ The new value is taken into account after a page reload or after a logout. It is a 3DSearch Control Center limitation. ◦ Once you specify and apply a value, it is impossible to come back to a lower value in the same session.
Default sort option	<p>Defines the default sort order for searched objects. This order can be: Relevancy, Most Recent, Oldest, Title A->Z, Title Z->A, or Type. The default sort order is Relevancy.</p> <div> <p>Important: For users, the sort order selected only displays when they do not have another sort order stored in their cache (which can be a previous default sort order, or their own previous sort order selection). They must empty their cache to see the new sort order.</p> </div>
Use numerical abbreviations to display quantities in 6WTags	<p>Displays numerical abbreviations for 6WTags values. For example, 1105 displays as 1K. When you do not select this parameter, the objects display exact numbers.</p>
Access to PLM Parameters	<p>Displays PLM parameters in the Advanced Search.</p> <p>Note: The Advanced Search can only display these parameters if you select Collaborative Spaces as datasource.</p>
Display suggestions in Top bar	<p>Displays search suggestions when you enter a query in the Top Bar search field.</p>
Display snippets in Search Results	<p>Displays snippets in the search results, to give the context of each hit through object properties.</p> <p>For more information, see Highlighting and Snippets.</p>
Force Advanced Search Mode for Applicative Search	<p>Forces Advanced Search by default on Web App clients (3DDashboard, 3D Space, POWER'BY apps). This is useful for users who know their data well, and for huge indexes, as you can search indexed content more precisely. They can therefore get a quick access to the Advanced Search mode.</p>

Property	Description
Search Synonyms	<p>Allows to return in the search results the objects that exactly match with the searched term, and the objects that match with the terms that have been defined as synonyms to the searched term.</p> <p>For example, when <code>3ds</code> and <code>Dassault Systemes</code> have been defined as synonyms, searching for <code>3ds</code> returns objects that contain <code>3ds</code>, and objects that contain <code>Dassault Systemes</code>.</p> <p>Notes:</p> <ul style="list-style-type: none">◦ Synonyms are only applied to global searches; they are not applied to applicative searches.◦ For searches containing multiple words, synonym results only return the synonyms that match with the entire search (synonyms of the search's individual words are not returned). <p>To enable this feature, do the following:</p> <p>Before you begin: Define your synonyms in a <code>JSON</code> file as follows:</p> <pre>{ "WordA" : ["SynonymA1"], "WordB" : ["SynonymB1", "SynonymB2"], "WordC" : ["SynonymC1"], "WordD" : ["SynonymD1", "SynonymD2"], "WordE" : ["SynonymE1"] }</pre> <p>For example:</p>

Property	Description
	<div><pre>{ "3DS" : ["DS", "dassault systèmes"], "CPG" : ["Consumer Packaged Goods"] }</pre></div> <div><div>a. Select Activate Synonyms.</div><div>b. From the Import Synonyms Dictionary section, click Browse and select the <code>JSON</code> file that contains the synonyms you have defined.</div><div>c. Click Validate.</div><div>A confirmation message indicates whether the content of your file can be successfully parsed or not. If successful, proceed to the next step. Otherwise, modify the content of your file and try again.</div><div>d. Click Apply to save your synonyms into the platform.</div></div> <div>Notes:<ul style="list-style-type: none">◦ You can modify the saved synonyms by uploading a new file at any time.◦ Uploading a new file overrides the synonyms that were saved from the previous file.◦ To remove all saved synonyms, you must reactivate the default Search Control Center settings on the current platform by clicking Restore.</div> <div><div>Important: Restore also resets all the other settings to default.</div><ul style="list-style-type: none">◦ To deactivate the search of synonyms, clear Activate Synonyms, then click Apply.</div>
Search suggested categories	<p>The Activate for all users option enables the Instant Search feature. This search mode displays the main categories matching with the query terms when you click the search field. For example, it shows Dashboards, Communities (including the private communities the user has access to), and Posts below the search history and general suggestions.</p> <p>You can:</p>



Property	Description
	<ul style="list-style-type: none"> ◦ Activate or deactivate the Instant Search feature. If you activate the feature, users have the Instant Search activated by default. They also have the possibility to deactivate it from the Search Options. ◦ Specify the type of categories to show (add new categories and delete existing categories). ◦ Choose to display up to 5 categories. <p>To add a new category:</p> <ol style="list-style-type: none"> Enter the title of the category, select a datasource, and up to 7 Types. Click Add. <p>The new category displays at the bottom of the Search suggested categories section.</p> <ol style="list-style-type: none"> From the list, you can  edit or  delete categories. <p>The Activate application category option enables the display of apps in the Instant Search suggestions.</p> <p>Notes: This option supports a maximum number of 4 categories is 4 (1 apps category and 3 type-based categories).</p>


Table 2.  **6WTags** - These properties control the display of 6WTags.

Property	Description
Enable option to edit tags categories	Activates the parameters underneath. If activated, 6WTags take the customization into account, for the selected applications. If not, they show the default tags.
Select Application Configuration	<p>Select the application for which you want to customize 6WTags. You can customize tags for 3DSearch, ENOVIA Product Structure Editor, ENOVIA Product Explorer, and ENOVIA Relations.</p> <p>Once the app settings are complete, you can switch to another context application, and repeat similar actions. Click Apply to save these settings on the server.</p>
Include tag to 6WTags tree	Select the tags to display by default on the 6WTags panel:

Property	Description
	<p>To include a tag, do the following.</p> <ol style="list-style-type: none">Click Include tag to 6WTags tree. The Include tag to 6WTags tree dialog box opens.Select a W category.From the Tag list, select a tag.Click Include. <p>The tag that you selected appears in the 6WTags panel in its corresponding 6W. For example, if you selected <code>Owner</code> it then shows into the <code>WHO</code> 6WTag.</p> <p>You can repeat the steps to include more tags.</p> <p>Note: This option is also known as <i>Preferred Tags</i>.</p>
Exclude tag from 6WTags tree	<p>Select the tags to exclude from the 6WTags panel.</p> <div><p>Warning: Several tools, like Product Structure Explore, require the <code>type</code> tag. If you exclude it, users cannot drag parts from the search results to the Product Structure Explorer widget.</p></div> <p>To exclude a tag, do the following:</p> <ol style="list-style-type: none">Click Exclude tag to 6WTags tree. The Exclude tag to 6WTags tree dialog box opens.Select a W category.From the Tag list, select a tag.Click Exclude. <p>You can repeat the steps to exclude more tags.</p>
Tags Operator	<p>Select the Boolean operator to apply when a user selects several values for a tag:</p> <ol style="list-style-type: none">Turn on Enable custom tag operator.

Property	Description
	<p>b. Click Add tag operator.</p> <p>The Add tag operator dialog box opens.</p> <p>c. From the Tag list, select the tag for which you want to apply a specific Boolean operator when a user selects several of its values.</p> <p>d. Select a Boolean operator.</p> <p>e. Click Add.</p> <p>f. Optional: Repeat steps b—e to select a Boolean operator for more tags.</p> <p>Note: When this option is disabled, the default operator is OR.</p>
Enable Controlled Vocabulary Mode	<p>Turn on Enable Controlled Vocabulary Mode to allow users to only create company and community tags. This option is available both on the cloud and on premises.</p> <p>Note: To take effect on the end users' 6WTags panels, end users need the Collaborative Industry Innovator license role.</p>
Company Tags Deployment	<p>Select the ontology that you want to use to display tags in the Company Tags category of the 6WTags panel. This option is only available on the cloud.</p> <p>Before you begin:</p> <ul style="list-style-type: none"> ◦ Have the Data Steward license role. This role allows you to access the Company Tags Deployment option in the 3DSearch Control Center. Users need the Collaborative Industry Innovator license role to use company tags from their own 6WTags panel. ◦ In Ontology Editor, create an ontology, and publish it in Dataset Governance. For more information, see the Ontology Editor User's Guide.

Property	Description
	<p>a. From the Current Database section, click Update Dataset.</p> <p>The Update Company Tags Dataset dialog box opens.</p> <p>b. From the Update Company Tags Dataset dialog box, select a data set, then click Update.</p> <p>The data set is deployed and appears in the history log of the Previous Deployments section.</p> <p>Note: If the data set that you selected then changes in Ontology Editor, repeat this step to update its deployment into the 3DSearch Control Center.</p> <p>c. Optional: In the Company Tag Icon URL field, enter the URL of the icon that you want to display for the Company Tag category.</p> <p>d. Optional: In the Company Tag prefix field, enter the text string that you want to attach before the beginning of each company tag. This prefix is added to the predicate level.</p> <p>e. Optional: Select the Company Tags Search Suggests box to make company tags available in the Search suggest.</p> <p>Your company tags are defined and available to all users in the 6WTags panel.</p>

Table 3.  **Advanced Search** - These properties control the behavior of the search features that help to filter objects on types. It is mainly for the **Advanced Search** and the **Preferred Types** features.

Property	Description
Enable option allowing the configuration of the display of types	Activates the parameters underneath.
Search on Instances	Activates the search for Logical Physical PLM Instances in 3D Space, and shows them in

Property	Description
	3DSearch for desktop apps and 3DDashboard. It includes Core Instances.
Default datasource	Select the datasource to display by default in the Advanced Search Datasource field.
Available types	Select the types to display by default in the Advanced Search.
Excluded types	Select the types to exclude from the Advanced Search.
Datasource	<p>Select the datasource on which you want to apply the property customization.</p> <p>Select All datasource and types to see all Available properties and Excluded properties, whatever their types.</p>
Type	Select the type on which you want to apply the property customization.
Available properties	<p>Select the properties to display by default in the Advanced Search.</p> <p>Note: Custom properties appear in the list provided they are Deployment Extension properties.</p> <div><p>Important: If custom properties do not appear in the list when the selected Datasource is All datasource and types, change the datasource to Collaborative spaces.</p></div>
Excluded properties	Select the properties to exclude from the Advanced Search and the Top Bar search.

Property	Description
	Note: Custom properties appear in the list provided they are Deployment Extension properties.

4. Click:

- **Apply** to validate your changes.
- **Cancel** to revert the changes made in the application, and restore them back from the server.
- **Restore** to cancel your changes and reactivate the default Search Control Center settings on the current platform.

Import and Export the 3DSearch and 6WTags Configuration

You can export all the behavior changes that you made on the **General**, **6WTags**, and **Advanced Search** tabs of the 3DSearch Control Center app in a **JSON** file, except for the **Company Tags Deployment** option.

You can then import this file into the 3DSearch Control Center app of another platform.



This feature allows you to save time when you want to replicate a configuration on another platform.

Import the Search Configuration

Before you begin:

To start the 3DSearch Control Center app, you must have:

- The Collaborative Industry Innovator (CSV) license.
- The **Platform Administrator** responsibility.



1. From the 3DSearch Control Center app, select the  **Import / Export** tab.
2. From the **Import Search configuration** section, click **Browse**.
3. Select the **JSON** file that contains the configuration that you want to import.
4. Click  **Import**.

Export the Search Configuration

Before you begin:

To start the 3DSearch Control Center app, you must have:

- The Collaborative Industry Innovator (CSV) license.
- The **Platform Administrator** responsibility.

1. From the 3DSearch Control Center app, select the  **Import / Export** tab.
2. Click  **Export Search configuration**.

The configuration is downloaded in a [JSON](#) file.

Note: This [JSON](#) file never includes the **Company Tags Deployment** configuration.


Change the Selected Tenant

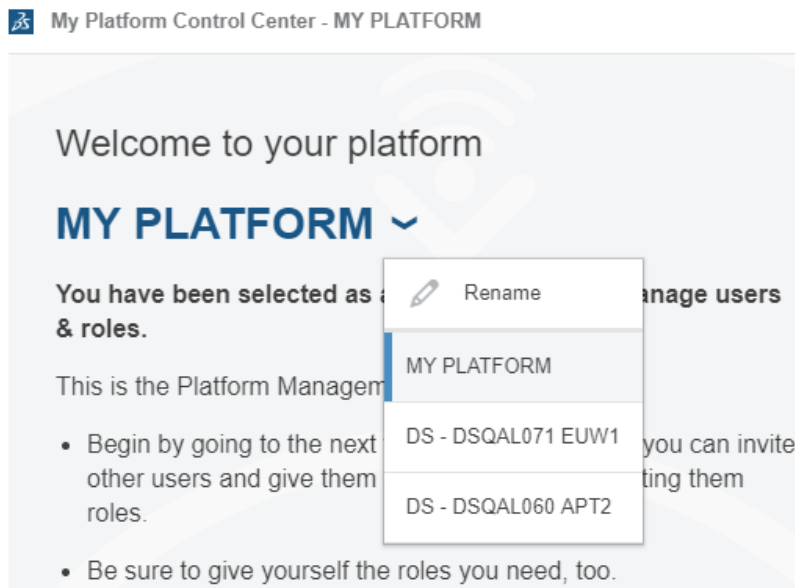
If you have multiple tenants, you may want to change the behavior of search elements for another tenant.

Before you begin: **Platform Management** is a locked dashboard. To customize it, for example, to rename it, change its layout, add or remove widgets, or update the widget **Preferences** (like the selected tenant), perform one of the following actions:

- Duplicate the dashboard. See [Duplicate a Dashboard](#).
Note: A duplicated dashboard does not receive subsequent updates.
- Create your own dashboard and add widgets available with the **Platform Manager** responsibility.

1. Go to **Platform Management > My Platform**

2. In the **My Platform** tab, click  on the right of the **MY PLATFORM** title.



3. Select another tenant.

The selected tenant also applies to all the other **Platform Management** tabs, and hence to the **Search** tab.

Important: During the tenant change, if the selected tenant does not have the 3D Space service, the 3DSearch Control Center app is not available.