



# Teamcenter Training

## Introduction to Objects and Relationships



It takes approximately 15 minutes to complete this module.

There is no audio. You are required to click **Next** to advance.



# OBJECTIVES

## **After this training, you will be able to:**

- Explain Teamcenter key terms
- Describe object relationships, including Items, Item Revisions, and Datasets
- Create folders
- Complete a search

# TEAMCENTER TERMS

Teamcenter uses a container structure and relational database to store data. So it is important for you to understand key terms associated with Teamcenter.

Term	Description
Item	An object generally used to represent a product, part, or component. Items can contain other objects, including other Items and object folders.
Item Revision	An object used to manage revisions to Items.
Item Master Revision Form	This form must be completed for each revision prior to release.
Dataset	<p>Data objects that manage data files created by other software applications. Each Dataset references at least two other objects: a Dataset type that contains a list of tools that can operate on the Dataset, and a tool that is used to create or modify the Dataset. Each Dataset can manage multiple operating system files. Each type of operating system file is called a Named Reference.</p> <p>Examples include:</p> <ul style="list-style-type: none"> <li>• UGMaster-NX (Cadramaster, Scanmaster, MSWord, Autocad, PDF, Solidworks)</li> <li>• UGPart</li> <li>• UGAltrep</li> </ul>
Relations	<p>Relations associate objects. There are different kinds, including Specifications, References, Manifestations, and Altrep.</p> <p>Examples include:</p> <ul style="list-style-type: none"> <li>• Datasets are associated with Item revisions using relation objects.</li> </ul> <p><i>(You will learn more about relations later in the training.)</i></p>

# ITEMS, REVISIONS, AND DATASETS

For each revision, there is typically a solid model, drawing, and CAM files. NX files, for example, are stored as Datasets. **Each Dataset has a relationship** in Teamcenter. Types of relationships include:

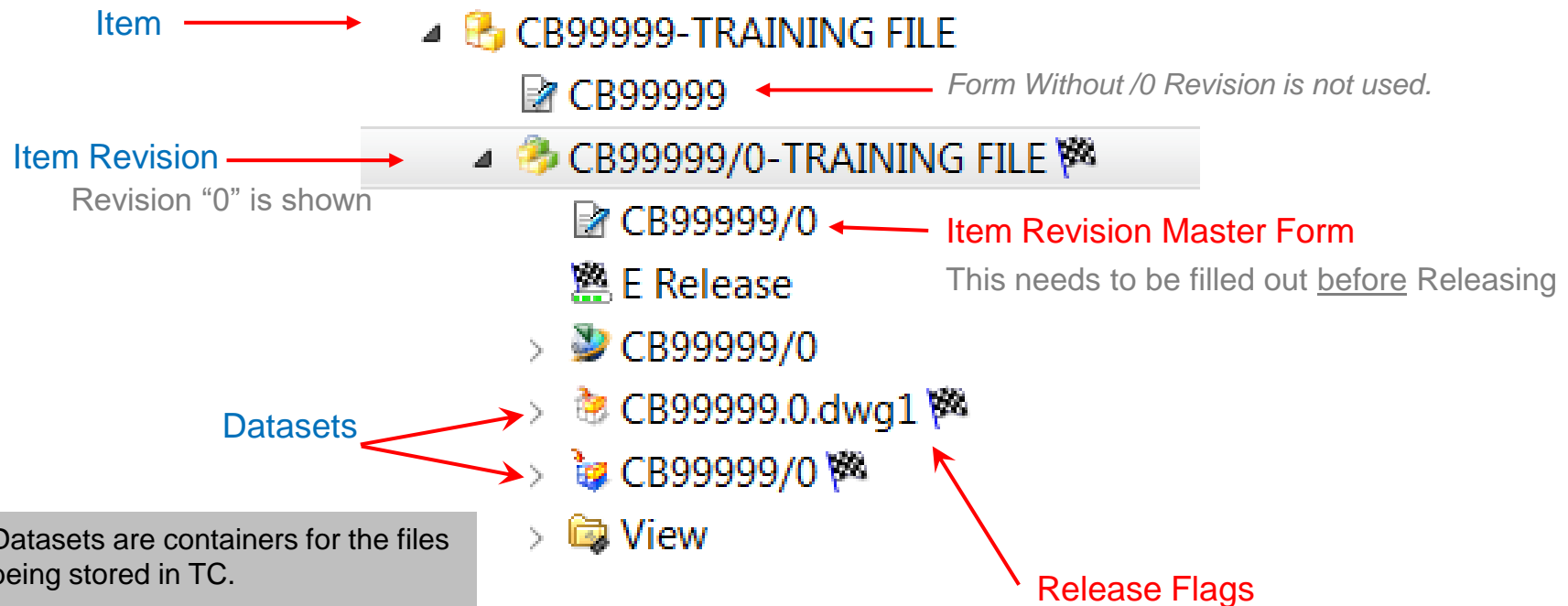
- **Specifications**—files will get release flags and get copied over to new revisions.
- **References**—files will *not* get release flags or get copied over to new revisions.
- **Manifestations**—files will *not* get release flags or get copied over to new revisions.
- **Altrep**—files will *not* get release flags or get copied over to new revisions (e.g., NX File).



**Remember:** Reference Datasets should be locked by highlighting and choosing a Dataset Release.

# HOW ITEMS ARE ORGANIZED

When working with objects, it is important to understand the relationships between them. Review the example of an Item object and its relationships. Some fields may be required **before** Releasing.



Datasets are containers for the files being stored in TC.

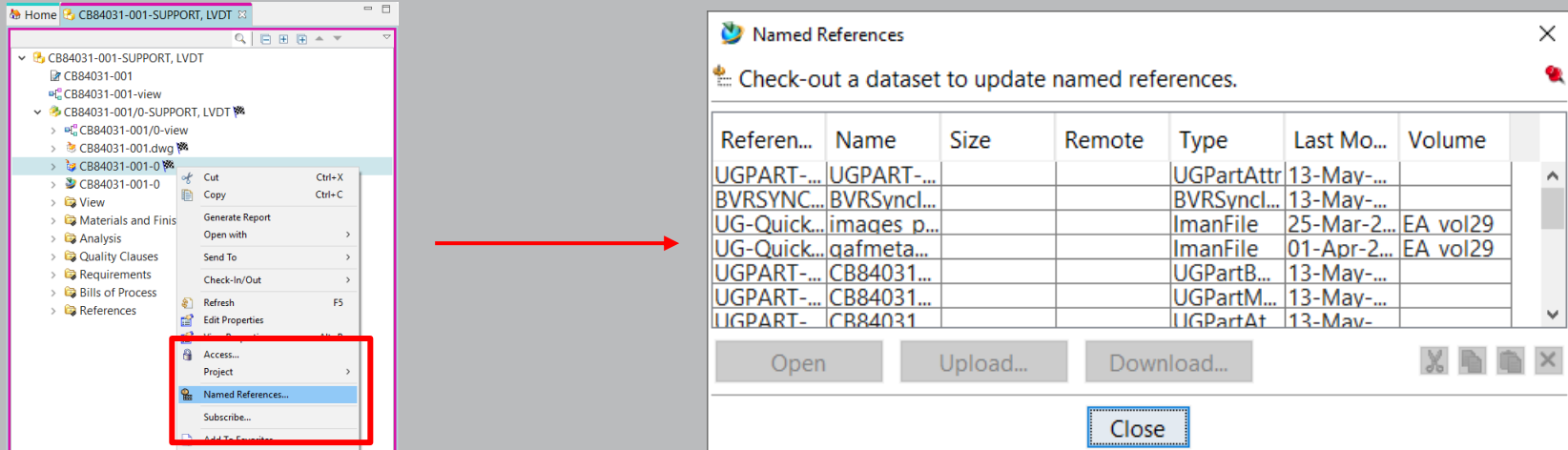
Example Datasets include:  
 UGMASTER (Model), UGPART (.dwg1), Autocad, Cadramaster, Scanmaster, MS Word, PDF, Excel, Solidworks, etc.

# DATASET—NAMED REFERENCES

Datasets are containers for storing files. You can use Named References to view associated files. You can upload and download data with Named References.

## To view Named References:

Right-click **Dataset** → **Named References** to open the Named References window. You can upload and download data directly from Teamcenter.



Named References

Check-out a dataset to update named references.

Referen...	Name	Size	Remote	Type	Last Mo...	Volume
UGPART-...	UGPART-...			UGPartAttr	13-May-...	
BVRSYNC...	BVRSyncl...			BVRSyncl...	13-May-...	
UG-Quick...	images p...			ImanFile	25-Mar-2...	EA vol29
UG-Quick...	qafmeta...			ImanFile	01-Apr-2...	EA vol29
UGPART-...	CB84031...			UGPartB...	13-May-...	
UGPART-...	CB84031...			UGPartM...	13-May-...	
UGPART-...	CB84031...			UGPartAt	13-May-	

Open Upload... Download... Close



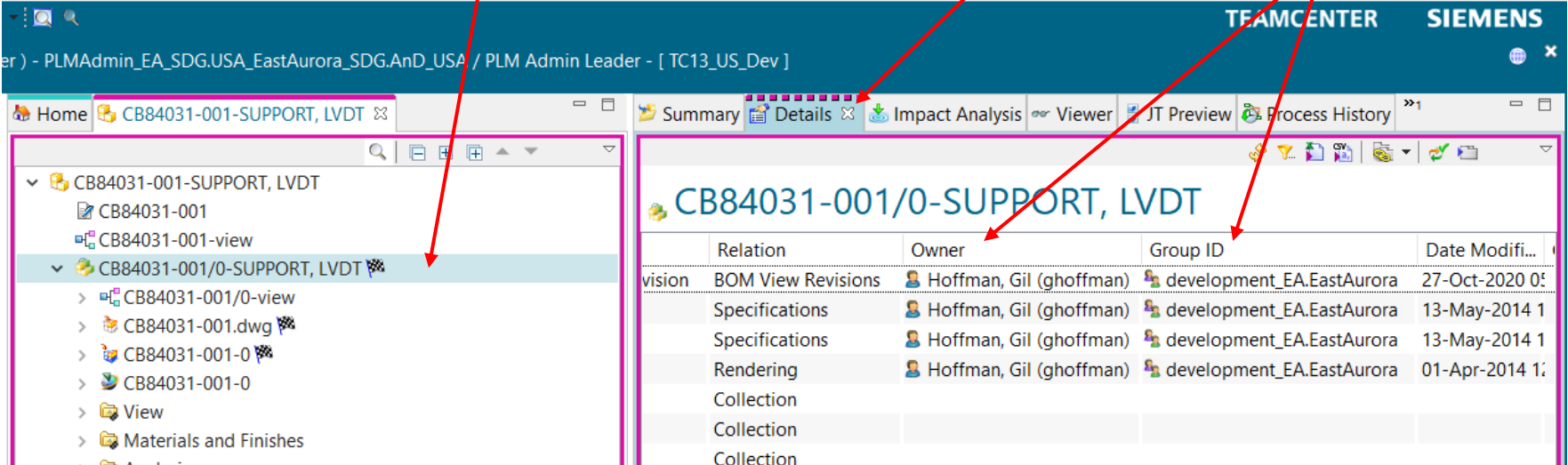
**Remember:** Check-out and check-in is required to upload via Named References.

# DETAILS TAB

To view specific information about an Item Revision in Teamcenter, select the Item Revision and view the Details Tab located in the Data Pane.

Highlight the Item Revision

Details tab – Shows data columns



The screenshot shows the Teamcenter interface with the following components:

- Left Pane (Data Pane):** Displays a tree structure of items. The item **CB84031-001/0-SUPPORT, LVDT** is highlighted.
- Top Navigation Bar:** Contains tabs for **Summary**, **Details**, **Impact Analysis**, **Viewer**, **JT Preview**, and **Process History**. The **Details** tab is selected.
- Details Tab Content:** Displays a table with the following data:

Relation	Owner	Group ID	Date Modified
BOM View Revisions	Hoffman, Gil (ghoffman)	development_EA.EastAurora	27-Oct-2020 05:10
Specifications	Hoffman, Gil (ghoffman)	development_EA.EastAurora	13-May-2014 10:10
Specifications	Hoffman, Gil (ghoffman)	development_EA.EastAurora	13-May-2014 10:10
Rendering	Hoffman, Gil (ghoffman)	development_EA.EastAurora	01-Apr-2014 10:10
Collection			
Collection			
Collection			

**Tip:** If the Details tab (or any other tab) is not visible, select

**Windows → Reset Perspective.**

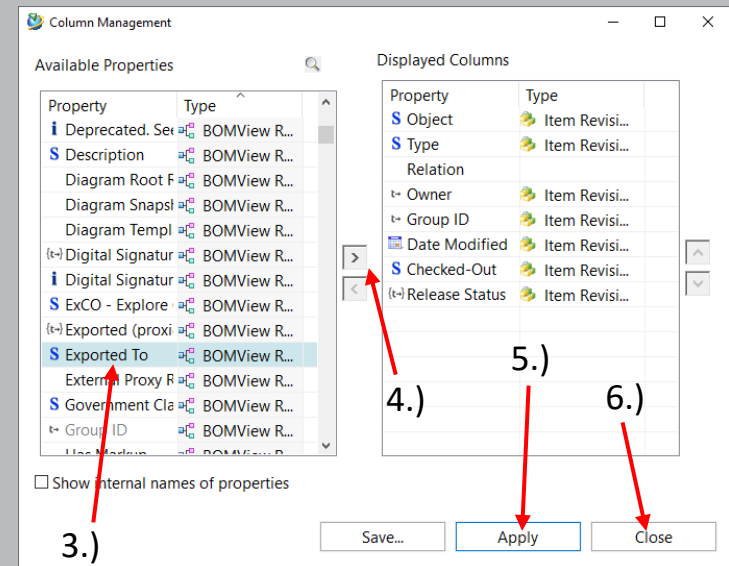
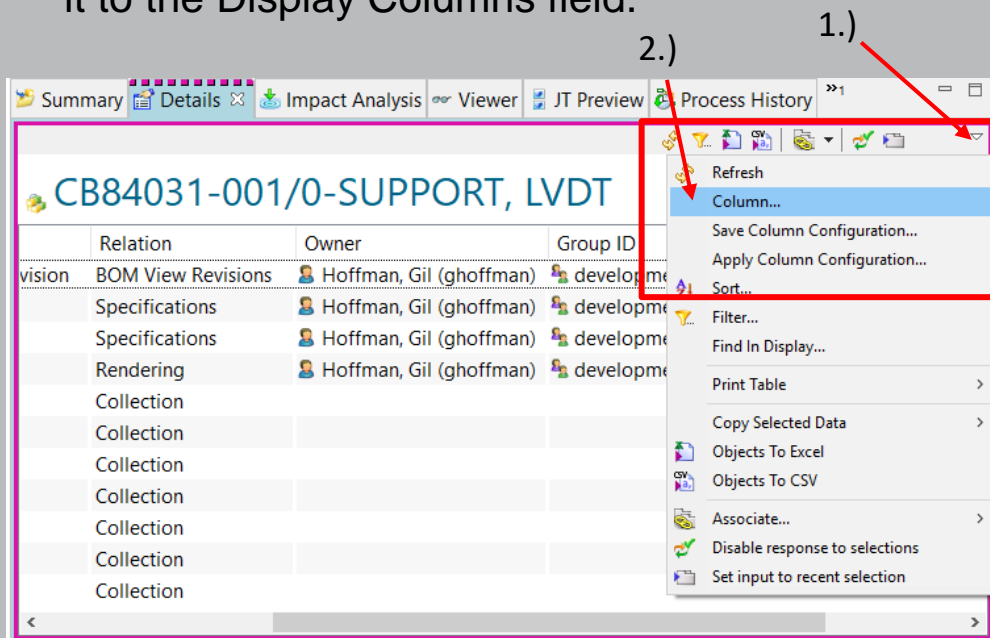


# ADD OR REMOVE COLUMNS

You can change what data is visible by adding or removing columns for any tab in the Data Pane.

## To Add Columns

Click the **drop-down arrow** on the right of the tab and select **Column**. When the Column Management window appears, select the **Property** you want to make visible and then add it to the Display Columns field.



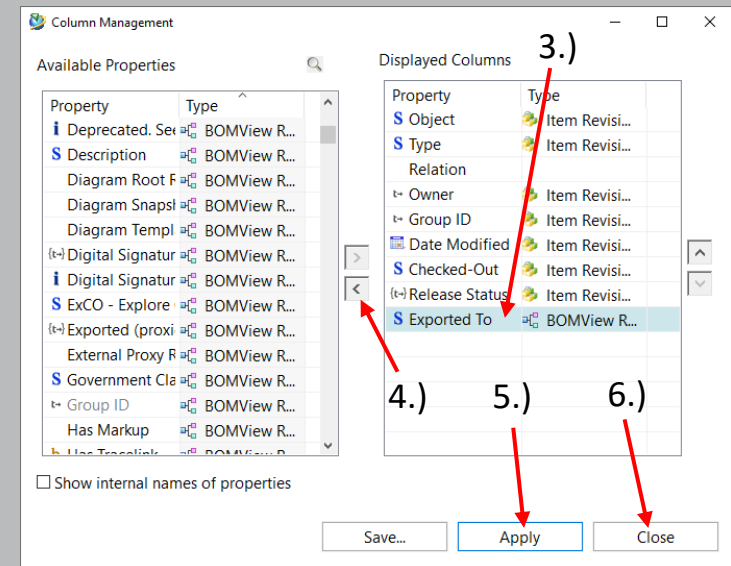
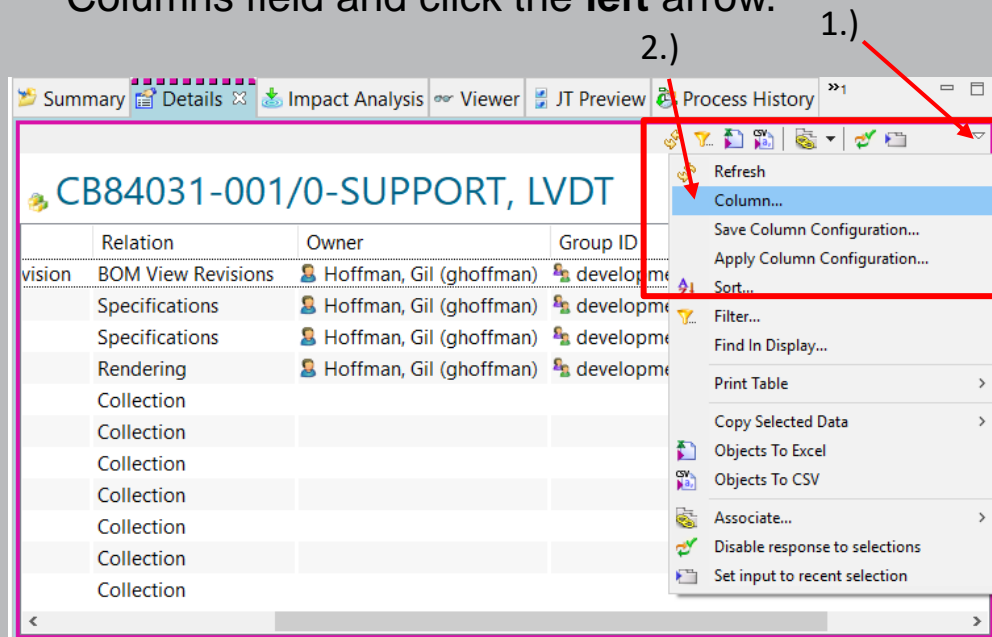


# ADD OR REMOVE COLUMNS (CONT.)

You can change what data is visible by adding or removing columns for any tab in the Data Pane.

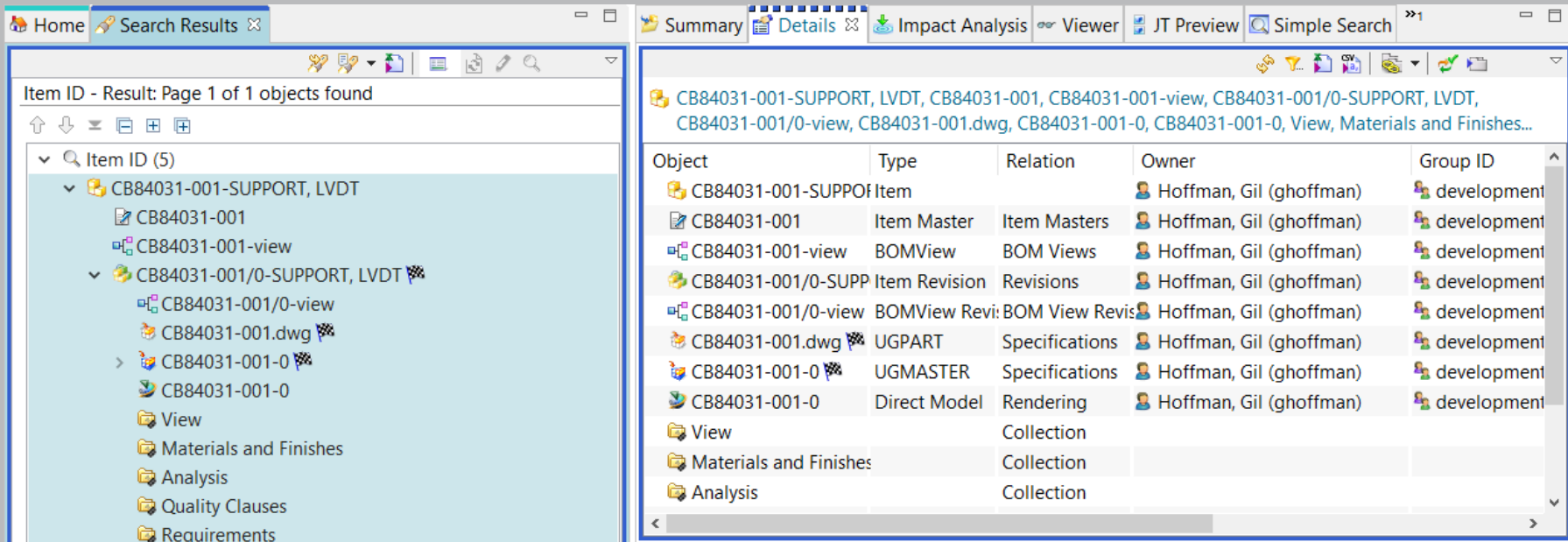
## To Remove Columns

Click the **drop-down** arrow on the right of the tab and select **Column**. When the Column Management window appears, select the **Property** you want to remove from the Display Columns field and click the **left** arrow.



# EXPAND ITEMS AND SHOW DETAILS

To see details about an entire Item structure, select all the objects in the Search Results. The details will display in the upper portion of the Details tab.



The screenshot shows a software interface with two main panes. The left pane, titled 'Search Results', displays a tree view of item structures. The right pane, titled 'Details', shows a table of objects and their properties.

**Search Results Pane:**

Item ID - Result: Page 1 of 1 objects found

- Item ID (5)
  - CB84031-001-SUPPORT, LVDT
    - CB84031-001
      - CB84031-001-view
    - CB84031-001/0-SUPPORT, LVDT
      - CB84031-001/0-view
      - CB84031-001.dwg
      - CB84031-001-0
      - CB84031-001-0
      - View
      - Materials and Finishes
      - Analysis
      - Quality Clauses
      - Requirements

**Details Pane:**

Summary Details Impact Analysis Viewer JT Preview Simple Search »1

CB84031-001-SUPPORT, LVDT, CB84031-001, CB84031-001-view, CB84031-001/0-SUPPORT, LVDT, CB84031-001/0-view, CB84031-001.dwg, CB84031-001-0, CB84031-001-0, View, Materials and Finishes...

Object	Type	Relation	Owner	Group ID
CB84031-001-SUPPORT, LVDT	Item		Hoffman, Gil (ghoffman)	development
CB84031-001	Item Master	Item Masters	Hoffman, Gil (ghoffman)	development
CB84031-001-view	BOMView	BOM Views	Hoffman, Gil (ghoffman)	development
CB84031-001/0-SUPPORT, LVDT	Item Revision	Revisions	Hoffman, Gil (ghoffman)	development
CB84031-001/0-view	BOMView Revision	BOM View Revisions	Hoffman, Gil (ghoffman)	development
CB84031-001.dwg	UGPART	Specifications	Hoffman, Gil (ghoffman)	development
CB84031-001-0	UGMASTER	Specifications	Hoffman, Gil (ghoffman)	development
CB84031-001-0	Direct Model	Rendering	Hoffman, Gil (ghoffman)	development
View		Collection		
Materials and Finishes		Collection		
Analysis		Collection		



**Remember:** The Group ID must be the same for the entire structure—Item and all Item Revisions. You **DO NOT** want a new revision owned by a Different Group ID. If necessary, a Group Admin can change all Group IDs using a Change Ownership Process.

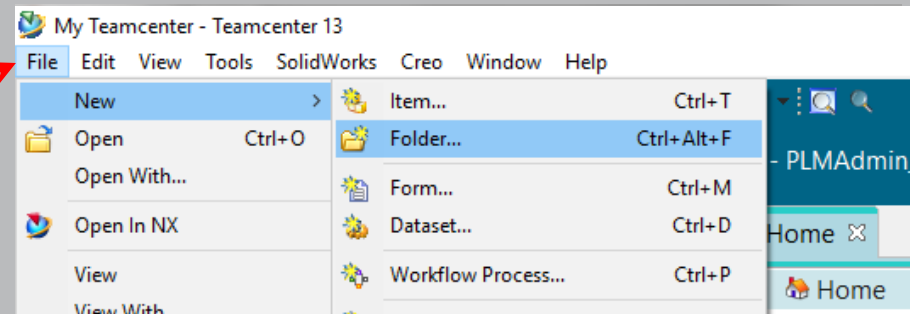
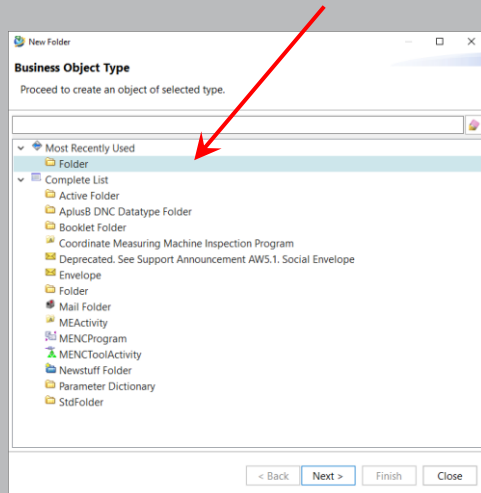
# FOLDERS AND DATA

As a Teamcenter user, you will need to create folders, search for data, and edit files. Follow these steps to create a folder.

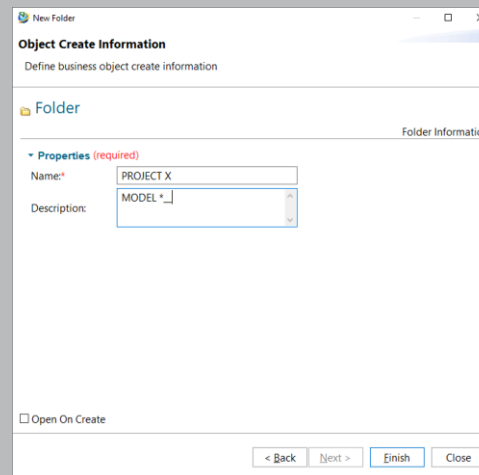
## To Create a Folder:

1. Select your **Home** folder, then from the toolbar, select **File** → **New** → **Folder**.

2. When the Business Object Type window opens, select **Folder** → **Next**.



3. When the Object Create Information window opens, enter a **Name** and **Description**.



4. Click **Finish** and **Cancel**. Notice that the folder was created in the Home folder.

# DATA SEARCH

As with any software, there are several ways to perform various tasks. The following screens outline two ways to search for Items.

- Search using the Search tab
- Search using Item ID

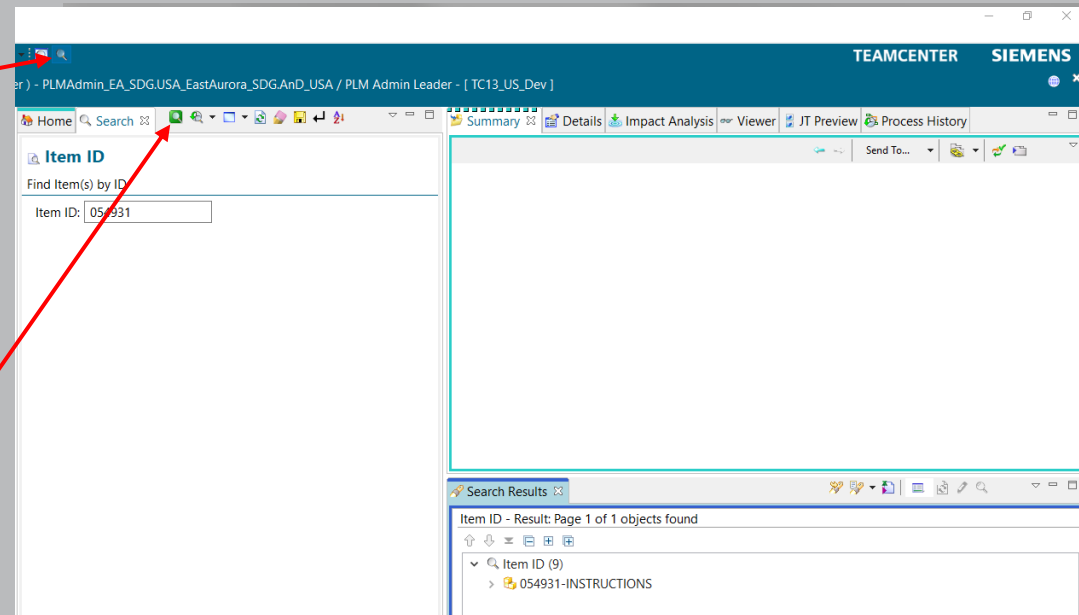


# SEARCH USING SEARCH TAB

Using the Search tab expands your search options, allowing you to perform more comprehensive searches.

## To Search:

1. Click the **Search** icon to open the Search tab.
2. Enter the **Item ID**. Adding an **asterisk (\*)** will enable a wildcard search.
3. Click the green **Search** icon to execute the search.
4. The search results will appear in the Search Results tab.



# CHANGE SEARCH TYPE

You can also change your search *type* from General to Item or Remote.

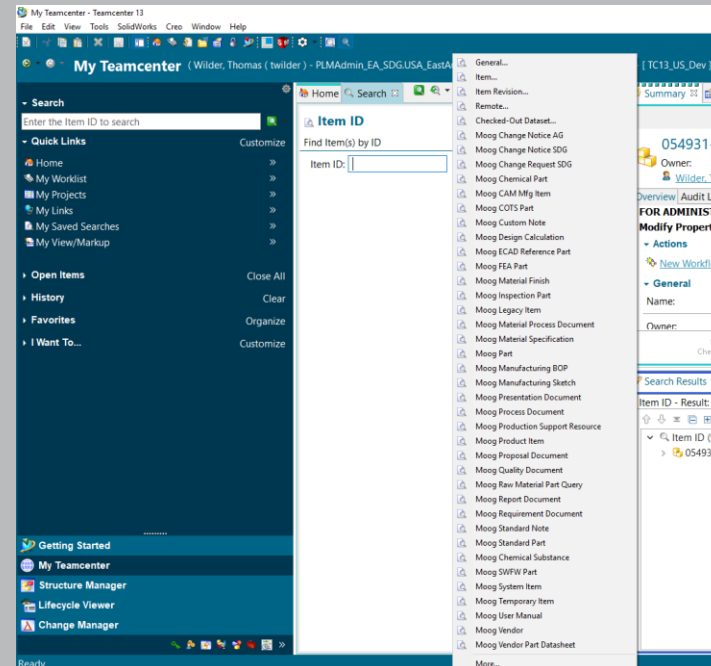
- **General**—searches everything.
- **Item and Item Revision**—searches Items and is used the majority of the time.
- **Remote**—searches Published Items for Importing from another Teamcenter Site.

## To Change Search Type:

Click the **drop-down** arrow on the **Search** tab and select a **Type**.



**Tip:** To save a search, select **More** from the drop-down and follow the prompts.

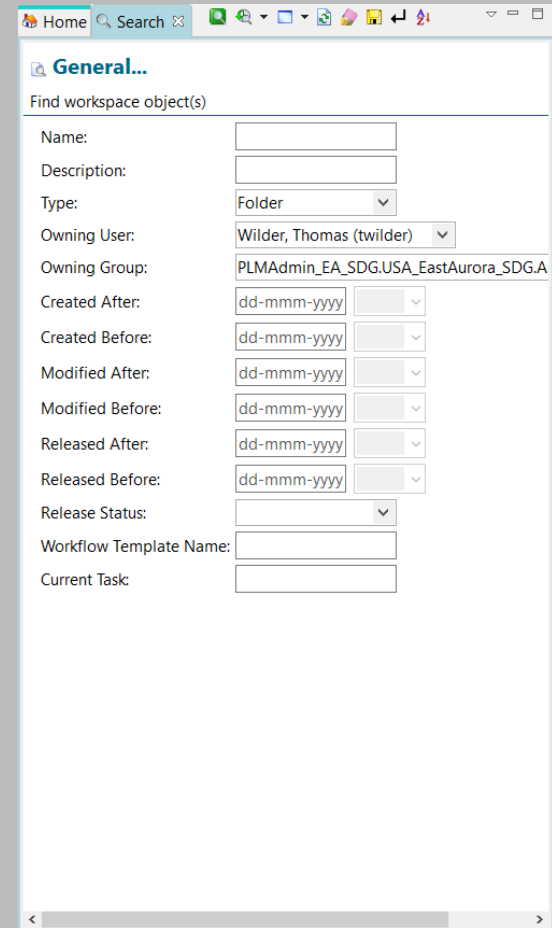


# GENERAL SEARCH—FOLDERS

After selecting General as the type, use the Search tab to search for folders.

## To Search for a Folder:

1. Clear all search fields using the eraser icon.
2. Enter known search criteria in the various fields.
3. From the **Type** drop-down, select **Folder**.
4. Execute the search using the green **Search** icon.



The screenshot shows a web application window titled "General...". It contains a search form with the following fields and controls:

- Find workspace object(s)**: A header for the search criteria section.
- Name**: A text input field.
- Description**: A text input field.
- Type**: A dropdown menu currently set to "Folder".
- Owning User**: A dropdown menu currently set to "Wilder, Thomas (twilder)".
- Owning Group**: A text input field containing "PLMAdmin\_EA\_SDG.USA\_EastAurora\_SDG.A".
- Created After**: A date input field with a dropdown arrow.
- Created Before**: A date input field with a dropdown arrow.
- Modified After**: A date input field with a dropdown arrow.
- Modified Before**: A date input field with a dropdown arrow.
- Released After**: A date input field with a dropdown arrow.
- Released Before**: A date input field with a dropdown arrow.
- Release Status**: A dropdown menu.
- Workflow Template Name**: A text input field.
- Current Task**: A text input field.



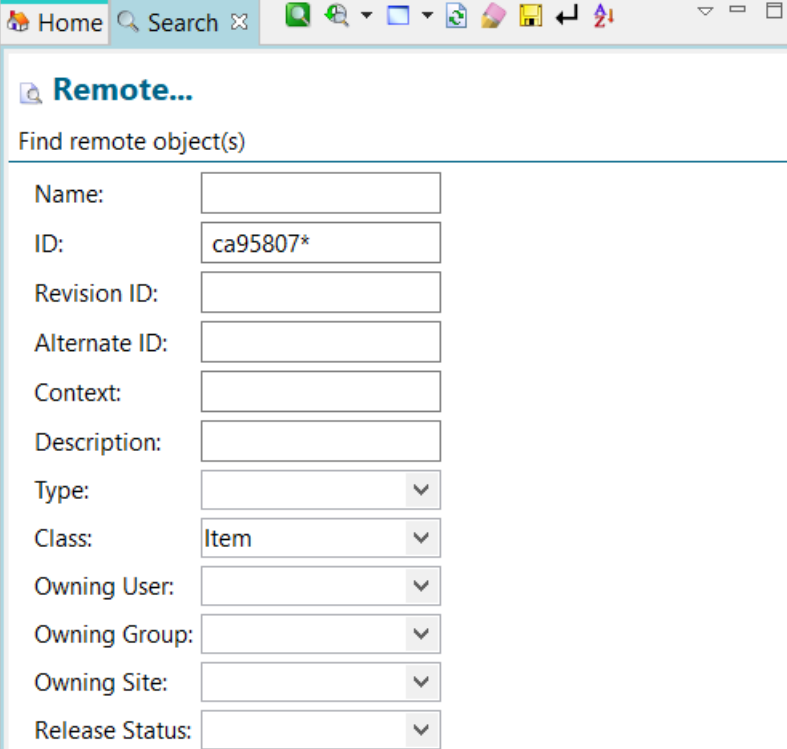
**Tip:** You can Copy/Paste a folder to your Home area. If you cannot find a folder, choose "CM Context" as the Type; it may have been created in error as this format.

# REMOTE SEARCH

Remote searches look for published Items to be imported from other sites. Remember to pick Remote as the search type from the drop-down.

## To Perform Remote Search:

1. Clear all search fields using the eraser icon.
2. Enter **ID\***.
3. Execute the search using the green **Search** icon.



The screenshot shows a web browser window with a 'Home' tab and a 'Search' tab. The 'Search' tab is active, displaying a 'Remote...' search form. The form has a title bar with a magnifying glass icon and the text 'Remote...'. Below the title bar is a section labeled 'Find remote object(s)'. The form contains several input fields and dropdown menus:

Name:	<input type="text"/>
ID:	<input type="text" value="ca95807*"/>
Revision ID:	<input type="text"/>
Alternate ID:	<input type="text"/>
Context:	<input type="text"/>
Description:	<input type="text"/>
Type:	<input type="text" value="Item"/>
Class:	<input type="text" value="Item"/>
Owning User:	<input type="text"/>
Owning Group:	<input type="text"/>
Owning Site:	<input type="text"/>
Release Status:	<input type="text"/>



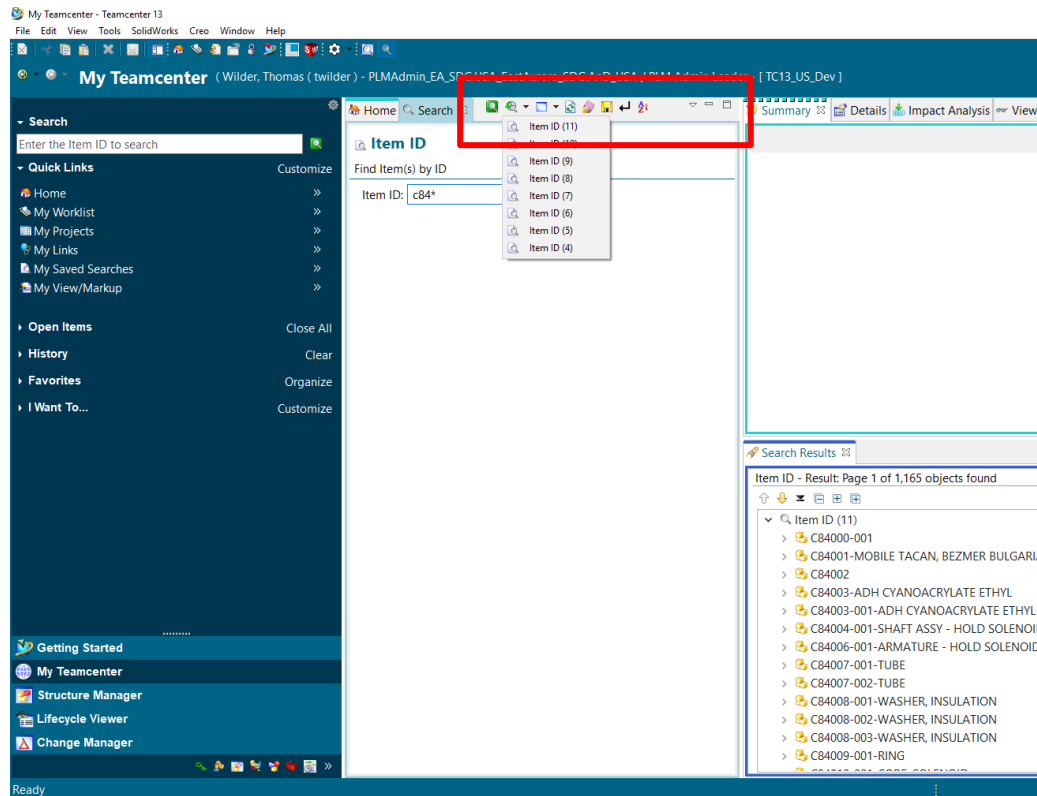
**Tip:** Items can be imported from another Teamcenter site. Instructions are available in the Teamcenter Help Library.



# SEARCH FEATURES

When using Teamcenter, explore the various search features by clicking the icons in the Search tab.

- Previous Search
- Save Search
- Latest Search



# ITEM SEARCH

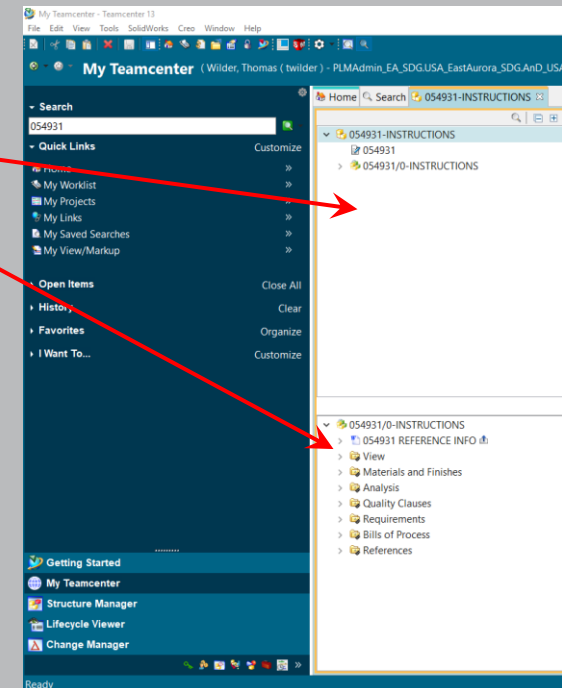
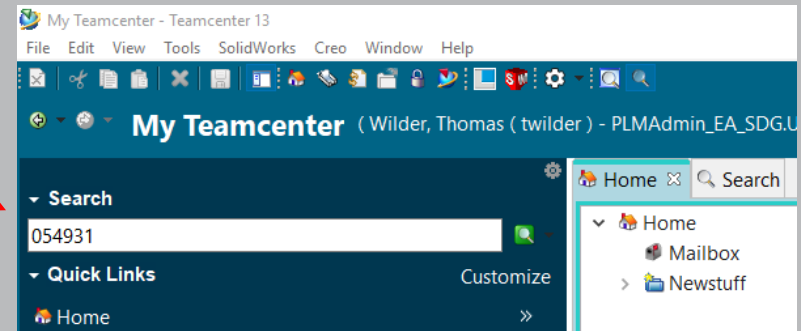
If you know the Item ID, use it to perform a Quick Search.

## To Search an Item:

1. Enter the ID in the Search field and click the green **Search** icon.

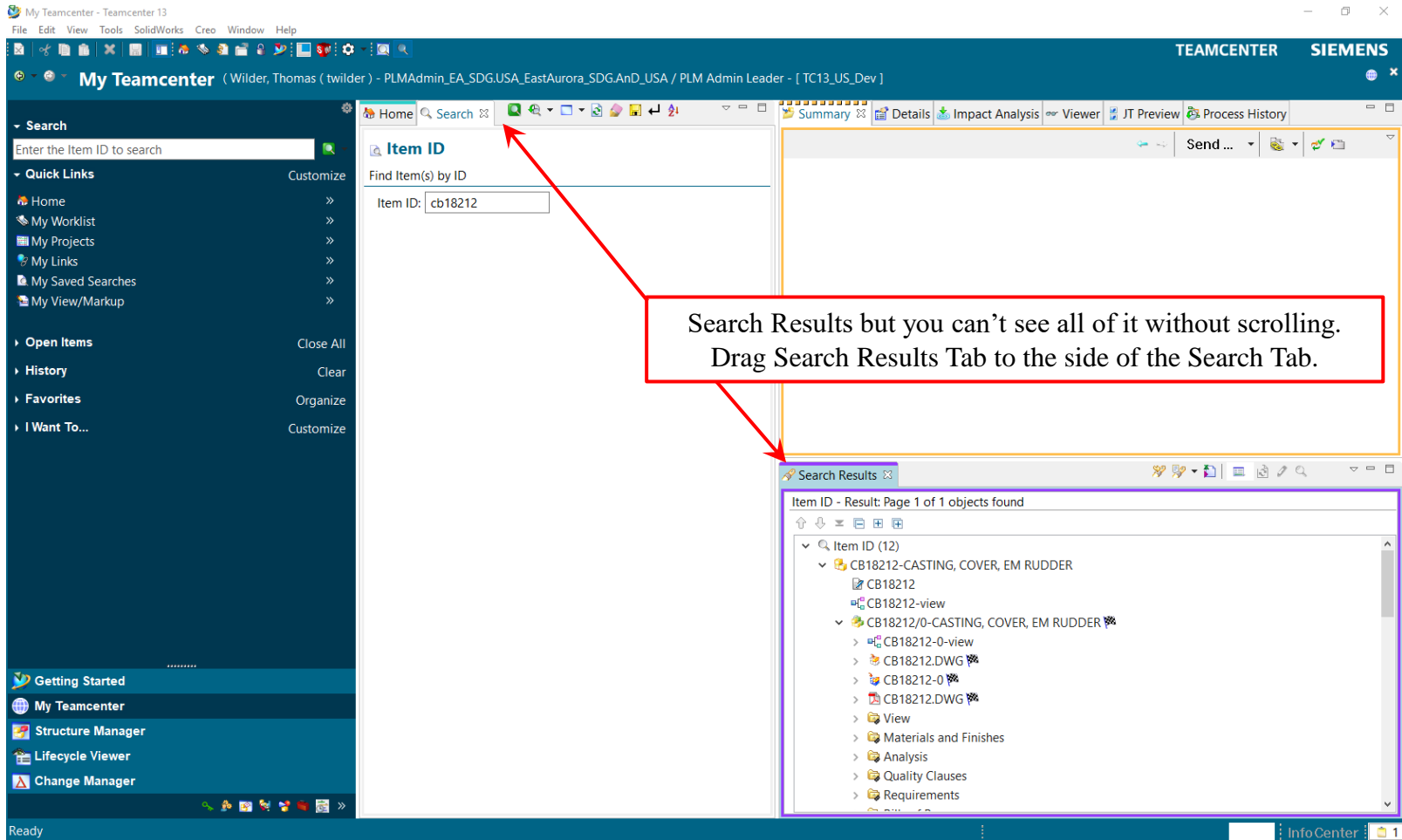
2. The Search Tab will open in the Component Pane and display search results.

The top window displays Item and Revisions, while the bottom window displays an expanded view of the Latest Item Revision.

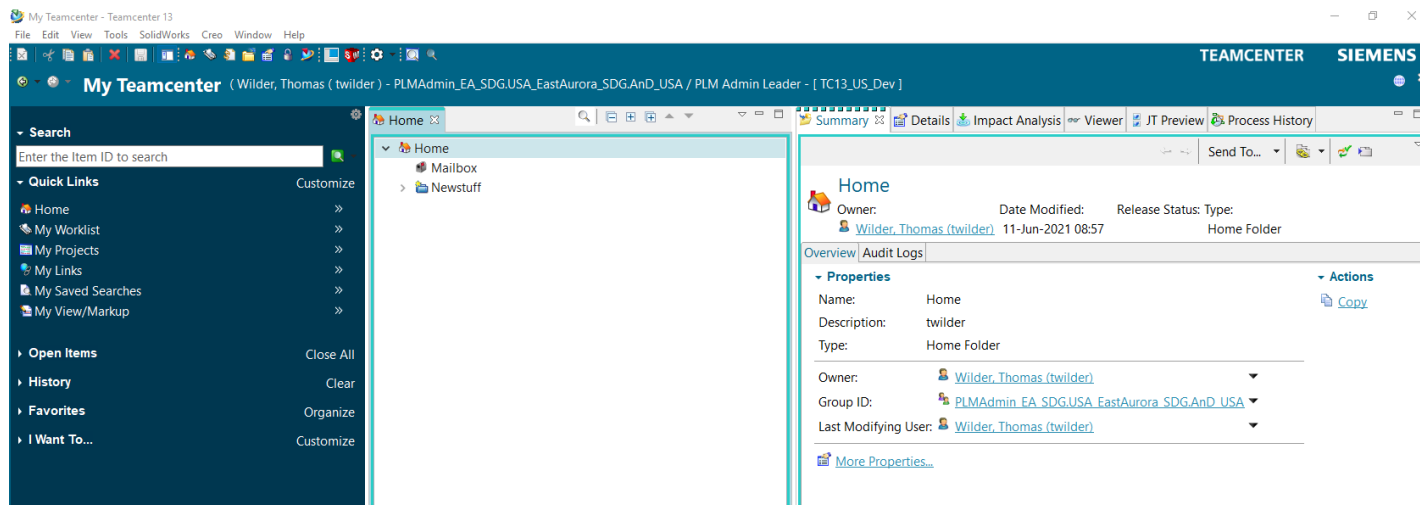
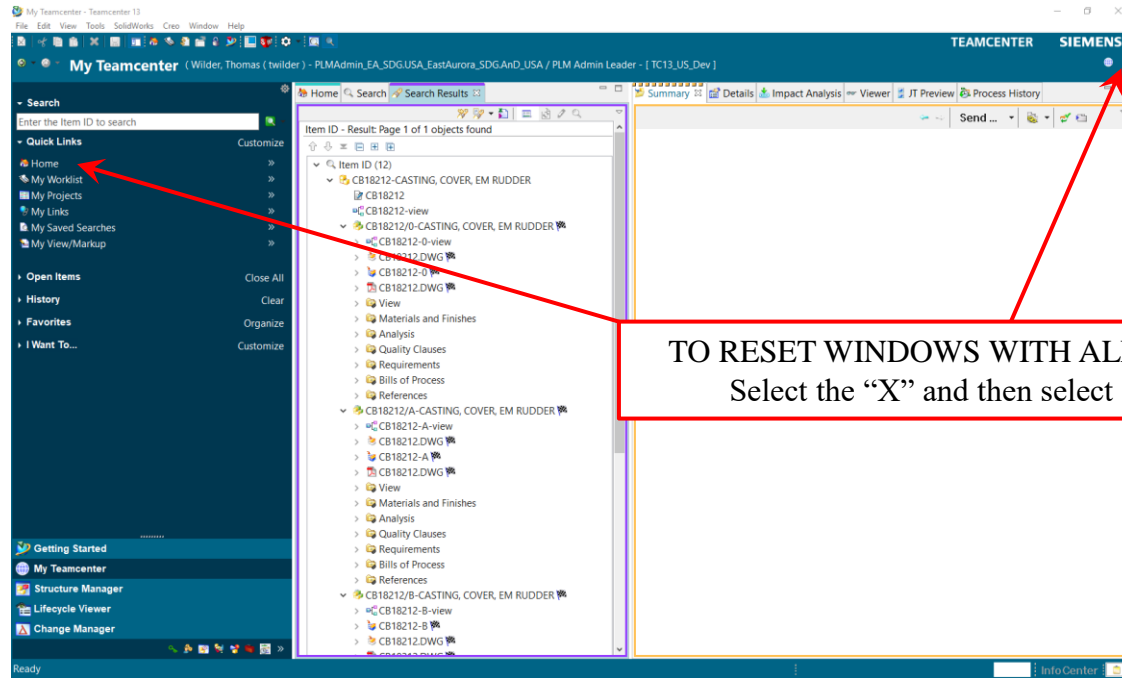


# MOVING TABS

You can move tabs in Teamcenter to adjust your view. For example, to move the Search Results tab, click the tab and drag it to the new location.



# RESET WINDOWS

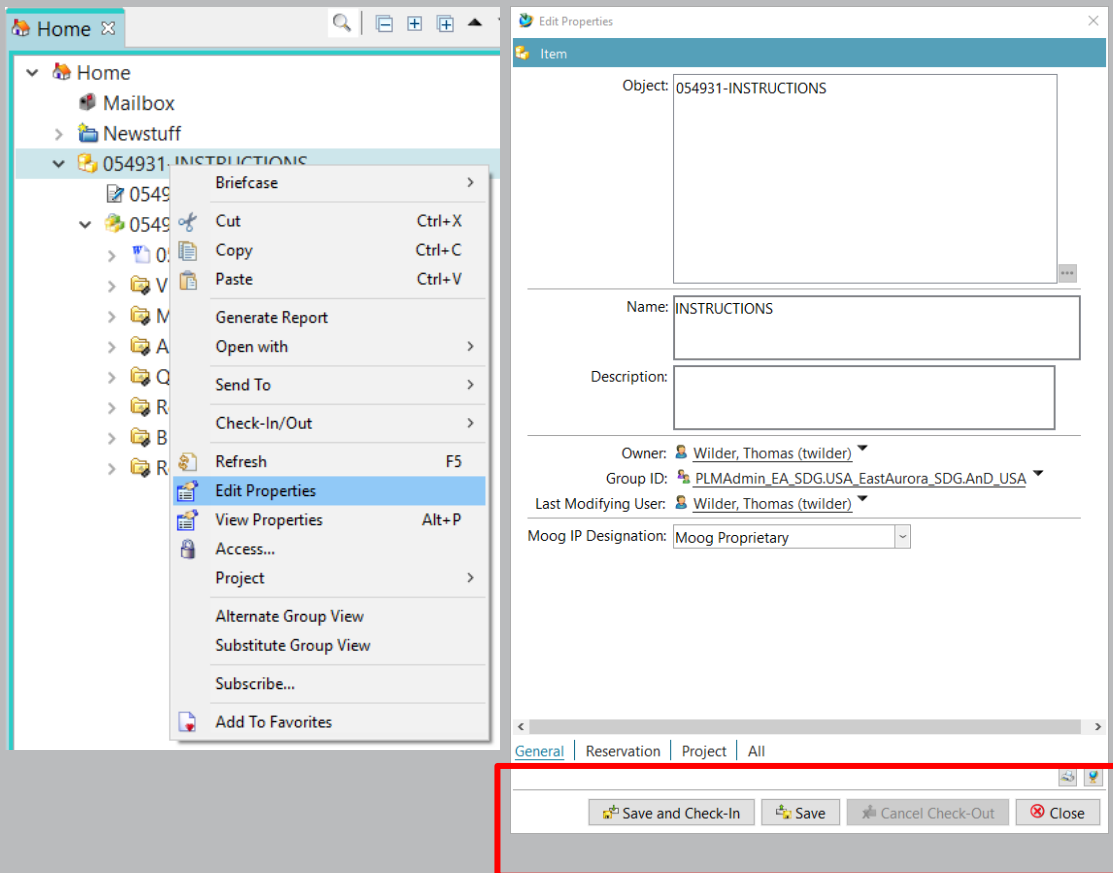


# EDIT PROPERTIES

You may need to edit properties associated with an Item. Follow the steps below to edit properties. **Never change an Item ID.**

## To Edit Properties:

1. Select **Item**.
2. Right-Click → **Edit Properties**.
3. In the Edit Properties window, change **Name** (or description).
4. Click **Save** and **Check-In**.



**Tip:** It is recommended to do a “Save As” to a New Item. Do NOT change the Item ID.

# RULES TO LIVE BY

When editing data or typing information into Teamcenter, use the following best practices to help keep data and information consistent.

- Use upper-case letters.
- Follow this naming convention for parts:  
Item Number.Revision.dwg1  
Example: A12345-001 (Part)  
A12345-001.0.dwg1 (Drawing)
- Use the MBS/SAP noun name as the Part name.
  - END CAP, BODY, MOTOR CAP
- Clean out your temporary files monthly at **C:\temp**.

# SUPPORT

- If you need system support with Teamcenter, you can always put in a Help Desk request.
- If it is process-specific help, ask a trusted resource to direct you to the correct contact. There are specific contacts based on the type of question or support needed.

# CONCLUSION

## CONGRATULATIONS!

You completed Teamcenter Introduction to Objects and Relationships. Close the course by clicking the **X** in the top right of the session window.

If you would like to learn more about Teamcenter, complete additional training modules available through the Moog Learning Center.