# Inhaltsverzeichnis

# 3. operate the integration

## 3.1. Working with module dialogs

*The module dialogs can be individually adapted.*

**Adapt table data**

In each module dialog that contains table data, you can change the table layout as follows:

- Drag the columns to a new position using Drag'n'Drop.
- Click and select the columns to display in the table.

Position and columns are stored on the PC for the Windows user.

**Adjust window sizes**

Adjust the window size for each module dialog. The size will be saved for the user and restored in the next session.

**Move event log window**

Drag the event log window in each module dialog to a new position and resize it. Position and size are saved for the user and restored in the next session.

**Move specific module windows**

Analogous to the event log window in all module dialogs, the **Overview** and **Details** windows can also be moved and resized in the **Synchronize Parts** module.

## 3.2. Create new project

*This chapter describes use cases for creating new projects from different sources.*

**Note:**
Make sure you are in the EPLAN view that displays the Integrate menu.

### 3.2.1 Creating a new project

*Create project templates and save them to the file system. With the integration you can then create new projects based on these templates.*

**Procedure**

| | |
|---|---|
| 1. | Select Integrate > New Project. The module dialog opens. |
| 2. | In the Project Settings area, enter a name for the new project. |
| 3. | Optional: Specify a destination directory other than the default one. |
| 4. | Activate the Template tab in the Project Source area. |
| 5. | Select a schematic template from the list. |
| 6. | Click OK. |

**Result**

- The new project is created according to the selected source and opened in EPLAN.
- The module dialog closes.

### 3.2.2 Create new project from project in file system

*Integration allows you to create new projects based on existing projects in the project directory.*

**Procedure**

| | |
|---|---|
| 1. | Select Integrate > New Project. The module dialog opens. |
| 2. | In the Project Settings area, enter a name for the new project. |
| 3. | Optional: Specify a destination directory other than the default one. |
| 4. | Activate the Design tab in the Project Source area. |
| 5. | Click More. |
| 6. | Select an existing project in the file system. |
| 7. | Click OK. |

**Result**

- The new project is created according to the selected source and opened in EPLAN.
- The module dialog closes.

### 3.2.3 Create a new project from project in Teamcenter

*Save projects centrally with the integration and make them available to everyone in Teamcenter. With the integration you can then create new projects based on these projects.*

**Procedure**

| | |
|---|---|
| 1. | Select Integrate > New Project. The module dialog opens. |
| 2. | In the Project Settings area, enter a name for the new project. |
| 3. | Optional: Specify a destination directory other than the default one. |
| 4. | Select the PLM tab in the Project Source area. |
| 5. | Click More. |
| 6. | Search for an existing project object in Teamcenter. |
| 7. | Click OK. |

**Result**

- The new project is created according to the selected source and opened in EPLAN.
- The module dialog closes.

## 3.3. save project in Teamcenter

*This chapter describes use cases for creating and updating EPLAN engineering information in Teamcenter.*

The modular structure of this module dialog, combined with the ability to create and upload output files, allows you to store exactly the data in Teamcenter that is currently relevant.

Whether you just want to save the project or save the parts list, all these actions are started from the same module dialog.

**Note:**
Select the correct project and make sure you are in the EPLAN view that displays the Integrate menu.

### 3.3.1 Save project

*With the integration you can manage the project files in Teamcenter and create and upload a PDF file for the schematic.*

#### Before you start

A project not yet saved in Teamcenter is available locally. Such a project contains only the name in the title block of the drawing but no other Teamcenter information.

#### Procedure

| | |
|---|---|
| 1. | Select **Integrate > Save to PLM**. |
| | The module dialog opens. Unless otherwise configured, the Name field in the Innovation area is automatically filled with the project name. The value of this field is used as a description in Teamcenter. Adjust it if necessary. |
| 2. | In the Innovation area, click Create. |
| | New objects are created in Teamcenter and the option **Keep reserved** is activated. |
| 3. | Activate options for output files. |
| 4. | Click OK or Apply. |

#### Result

- The activated output files are created and saved in Teamcenter.
- The link information in the project is updated and the object is reserved for the current user in Teamcenter.
- The module dialog closes (OK) or remains open (Apply).

#### Next steps

- Check the title block of the drawing for updated Teamcenter information.
- Check the created output files in Teamcenter.
- Repeat the process to save changed project information to Teamcenter at any time.

## 3.3.2 Linking a project manually

*Normally, when saving, you first create a new object in Teamcenter and automatically link it to the project. With the integration you can also manually link the project with an existing object in Teamcenter.*

#### Before you start

A project not yet saved in Teamcenter exists locally and unlinked objects exist in Teamcenter.

#### Procedure

| | |
|---|---|
| 1. | Select **Integrate > Save to PLM**. |
| | The module dialog opens. Unless otherwise configured, the Name field in the Innovation area is automatically filled with the project name. The value of this field is used as a description in Teamcenter. Adjust it if necessary. |
| 2. | In the Innovation section, click Assign. |
| 3. | Search for an existing and unreserved object in Teamcenter. |
| 4. | Optional: Activate options for output files. |
| 5. | Click OK. |

**Result**

- The link information in the project is updated and the object is reserved for the current user in Teamcenter.
- The module dialog closes (OK) or remains open (Apply).

# 3.3.3 Save reservation

*You can use integration to retain or delete the object reservation when you execute the storage process.*

When saving to Teamcenter, a newly created or manually linked object is automatically reserved for the current user. The Keep reserved option remains activated by default.

| |
|---|
| Check in (delete object reservation) |
| If you want to check in the project and thus delete the object reservation, deactivate the Keep reserved option the next time you save. |
| Check out (reserve object) |
| If you want to check out an existing project and thus reserve the object for the current user, use the Open from PLM integration function. |

## 3.3.4 Save parts list

*With the integration you can export the parts list from the parts list header and save it in Teamcenter. However, missing parts list items from the project can only be created in Teamcenter using the Synchronize Parts module.*

**Procedure**

| | |
|---|---|
| 1. | Select **Integrate > Save to PLM**. |
| | The module dialog opens. Unless otherwise configured, the Name field in the Bills of materials area is automatically filled with the name of the BOM header from the project. The value of this field is used as a description in Teamcenter. Adjust it if necessary. |
| 2. | Select an entry in the Bills of materials area and click Create. |
| | A new object is created in Teamcenter. |
| 3. | Activate theBOM option. |
| 4. | Click OK. |
| | The parts list is exported from the project and compared with Teamcenter. The BOM Comparison dialog opens. |
| 5. | Compare the BOM changes in the BOM Comparison dialog before uploading the BOM to Teamcenter. |

| | |
|---|---|
| 6. | Click OK. |
| 7. | Optional: If you discover errors in the parts list, click Cancel. In this case, no BOM information and output files are uploaded to Teamcenter. |

**Note:**
Check the entries in the Missing parts tab. These BOM items do not yet exist in Teamcenter and therefore cannot be included in the BOM.

**Result**

- The activated output files are created and saved in Teamcenter.
- The parts list is uploaded to Teamcenter and synchronized in both systems. BOM items that have already been linked are added to the BOM in Teamcenter, missing BOM items must be created first.
- The link information in the project is updated.
- The module dialog closes (OK) or remains open (Apply).

**Next steps**

- Check the created output files in Teamcenter.
- Check the bill of materials in Teamcenter.
- Use the Synchronize Parts module to create missing items in Teamcenter. Then run the Save to PLM module again to complete the parts list in Teamcenter.

## 3.4 Open project from Teamcenter

*This chapter describes how projects can be downloaded from Teamcenter and opened in EPLAN.*

**Note:**
Make sure you are in the EPLAN view that displays the Integrate menu.