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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.

3.4.1 Open unreserved project for editing

Integration allows you to download a non-reserved project from Teamcenter, open it in EPLAN for editing and reserve it in Teamcenter for the current user.

Before you start

A project is saved in Teamcenter but not reserved.

Procedure

1.	Select **Integrate > Open from PLM**. The module dialog opens.
2.	In the Innovation section, click on Search.
3.	Search for an existing and unreserved object in Teamcenter.
4.	Optional: Select a different target directory.
5.	Activate the Check out option.
6.	Click OK.

Result

- The project files are downloaded from Teamcenter, extracted and opened in EPLAN for editing.
- The object is reserved for the current user in Teamcenter.
- The module dialog closes.

3.4.2 Open reserved or released project

Integration also allows you to open reserved or released projects from Teamcenter in EPLAN. You can edit the project locally, but you cannot save it back to Teamcenter.

Before you start

A project is stored in Teamcenter and is either reserved or released.

Procedure

1.	Select **Integrate > Open from PLM**. The module dialog opens.
2.	In the Innovation section, click on Search.
3.	Search for an existing and unreserved object in Teamcenter.
4.	Optional: Select a different target directory.
5.	Activate the View option.
6.	Click OK.

Result

- The project files are downloaded from Teamcenter, extracted and opened in EPLAN read-only.
- The module dialog closes.

Next steps

Revision the released project in Teamcenter to open it for editing in EPLAN.

3.5. Match components and items

This chapter describes use cases for the alignment of parts, items and attributes between the library and Teamcenter.

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

How you work with your components in EPLAN and the items in Teamcenter depends on your workflows.

- You can manage all items in Teamcenter and use the Synchronize Parts function to synchronize

the data regularly with the library in EPLAN.
- You can manage all components in the library in EPLAN and use the Synchronize Parts function to create new items in Teamcenter and synchronize the attribute values.
- You can use a mixture of both. Manage the items and the most important attribute values in Teamcenter. Manage the other attribute values in the library in EPLAN and use the Synchronize Parts function to synchronize both systems. To do this, you must configure different synchronization directions, for example:

- Item number in Teamcenter: Teamcenter > EPLAN
- Footprint name: EPLAN > Teamcenter
- Description: Teamcenter > EPLAN

3.5.1 Create Fehelnde Items

With the integration you can automatically create missing items from the last upload of the parts list in Teamcenter and link them to the components.

Before you start

A project was saved with the BOM option in Teamcenter. Make sure that the project contains parts that do not exist as items in Teamcenter and are listed in the Missing Parts view of the BOM Comparison dialog.

Procedure

1.	Select Synchronize Parts in EPLAN Integrate > Synchronize Parts.
	The module dialog opens. By default, you are not informed about missing items in Teamcenter from the last upload of the parts list. If you want to be informed about this when starting the **Synchronize Parts** module, you can configure this behavior. See Installation and Administration Guide for more information.
2.	Select Items > Add > Missing Parts in the menu and select the entry of the last parts list upload.
	The parts without a corresponding item in Teamcenter are loaded into the Overview area.
3.	Select individual components in the Overview area or click Select All.
4.	Click Synchronize.

Result

- An item is created in Teamcenter for each selected component and the new number is linked to the component.
- Depending on the setup, the item number is created analogous to the part number or the item number is generated automatically and written into a separate field in the library.

3.5.2 Calibrate new component

Integration allows you to synchronize new parts in the library with Teamcenter. New items are created in Teamcenter and linked to the components.

Procedure

1.	Create a new part in the library.
2.	Select Synchronize Parts in EPLAN Integrate > Synchronize Parts. The module dialog opens.
3.	

	→Enter the part number in the quick search field and press Enter.
	→Select Items > Add and find the component by its class.
4.	Select the component in the Overview area and click Synchronize.

Result

- An item is created in Teamcenter for the selected part and the new number is linked to the part.
- Depending on the setup, the item number is created analogous to the part number or the item number is generated automatically and written into a separate field in the library.

3.5.3 Linking a component with an item

With the integration you can also manually link components with items.

Before you start

Non-linked components and items are available in both systems.

1.	Select Synchronize Parts in EPLAN Integrate > Synchronize Parts. The module dialog opens.
2.	Search for the new component in two ways.
	→Enter the part number in the quick search field and press Enter.
	→Select Items > Add and find the component by its class.
3.	Select the component in the Overview area and click Link.
4.	Search for the item in Teamcenter, select it, and click OK.

Result

- The component is linked to the item and the attributes are adjusted.
- Depending on the setup, the item number is created analogous to the part number or the item number is automatically generated and written into a separate field in the library.

3.5.4 Adjusting attribute changes

Integration allows you to adjust attribute changes to items that are already linked to the components.

Before you start

Linked items are available in Teamcenter.

Procedure

1.	search for an already synchronized item in Teamcenter and open its properties.
2.	change some of the common EPLAN attributes.
3.	select **Integrate > Synchronize Parts** in EPLAN. The module dialog opens.
4.	Enter the item number in the quick search field and press Enter.
5.	Select the component in the Overview area.
6.	Check the changed attribute values in Teamcenter in the Details area.
7.	click **Synchronize**.

Result

The changed attribute values from the item in Teamcenter are compared with the part.

3.6. Release and revise the project

A project is released and revised directly in Teamcenter.