

Teamcenter Requirements Manager

**Student Guide
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MT25750 – Teamcenter 8**

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Course overview

Teamcenter course title course description.

Provide an overview paragraph describing the purpose of the course and general training topics. This should match the course description written for the Siemens PLM Software training website.

Course objectives

List the primary course objectives formulated from the lesson learning objectives. This should include the “To” parts of the objective and should match the course objectives written for the Siemens PLM Software training website

- To create an organization.
- To ...
- To ...

Key benefits

List the key benefits from completing the course objectives. This is what you expect them to accomplish.

Key benefits for completing the course objectives include:

- You are able to define and create your organization in Teamcenter.
-

Prerequisites

Prerequisites should match the course prerequisites written for the course description posted to the Siemens PLM Software training website.

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Audience

Audience should match the *who should attend* section written for the course description posted to the Siemens PLM Software training website.

Modify the following table to include only the rows applicable to the audience for this course.

The audience for this course includes:

User profile	Job responsibility
Consumer	Gather information
Reviewer	Provide feedback
Workflow contributor	Complete work assignments
Author	Administer product structure, create data, and relate objects
Power User	Mentors other users and administers data with additional access permissions
Application administrator	Administer users, administer security, define workflows, and configure the data model
System administrator	Maintain servers and users
Database administrator	Maintain databases
Installer	Install, upgrade, migrate, and configure software
Customizer	Customize features
Migrator	Migrate data

Learning tracks

Learning tracks for Teamcenter are found on the Siemens PLM Software training Web site:

<http://training.ugs.com/tracks/index.shtml>

Training materials provided

Material	Description
<i>Student Guide</i>	Presentation slides. Yours to keep and make notes. Evaluation is provided both online and in the back of the <i>Student Guide</i> . Student profile is provided in the back of the <i>Student Guide</i> .

<i>Student Workbook</i>	Activities are provided online in electronic format and designed to appear on the left of the monitor. A CD of electronic activities is provided in the back of the <i>Student Guide</i> .
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Accessing Teamcenter online help

The *Teamcenter Help Library* covers functionality from end-user tasks to customization instructions.

To access the *Teamcenter Help Library*:

- In the rich client, choose **Help® Help® Help Library** or press the F2 key.
- In the thin client, choose **Help® Web Collection** to access the thin client help or choose **Help® General Collection** to access the full library.

To access help for the current application:

- In the rich client, choose **Help® Help® Current Application** or press the F1 key.

Note

You cannot access application-specific help in the thin client.

Lesson

1 Lesson title

Purpose

The purpose of this lesson is to ...

Objectives

After you complete this lesson, you should be able to:

-
-

Help topics

Additional information for this lesson can be found in:

- *[Getting Started with Teamcenter 2007](#)*
-

Basic concepts about Requirements Manager

To manage requirements, an organization may use spreadsheets, linked documents, custom databases, and document-oriented tracing tools. Typical problems in such methods are that requirements are isolated on individual computers with limited access, stored in databases with little resemblance to the product structure, or maintained through complicated user interfaces with significant learning curves.

Requirements Manager simplifies requirement development and access, and substantially reduces the learning curve. Requirements are developed with Microsoft Word and Microsoft Excel, tools that are readily available in most organizations.

Development of requirements

The first step in requirements development is to gather information for source requirements. Such information may be gathered from telephone conversations, meetings, regulatory agencies, standards organizations, and external documents.

The next step is to analyze that information, looking for issues, ideas, and keywords expressed by the customer. By those guidelines, irrelevant material can be separated and discarded. The remaining information becomes the content for the source requirements.

Then, additional requirements are derived from the source requirements. This step involves creating more detailed requirements that can be traced back to the originating sources. Trace links, from source requirements to derived requirements to other derived requirements, establish the order of precedence among requirements.

Also in the development process, requirements are organized according to their intended implementation. This organization partitions the requirements around designs, so that records can be generated for reference in comparing changes with previous structures.

Association of requirements with design

Following development, requirements are ready for association with the product design and individual components. Through trace links, requirements are connected to objects in other Teamcenter applications, as appropriate for the product design.

The trace links show how requirements affect the linked objects, the overall development in a discipline, and the dependencies among the disciplines. These complementary relationships increase efficiency by:

- Reducing latency of design and decisions.
- Minimizing the need for changes late in the development process.
- Preventing repetition of past mistakes.
- Enabling process measurement and improvement.
- Promoting accurate design documentation.
- Notifying downstream disciplines of decisions based on the requirements, immediately and in context.

Basic tasks using Requirements Manager

Use Requirements Manager to perform the following tasks:

- **Develop requirements.**

In Requirements Manager, you work with requirement specification structures that contain requirements and paragraphs.

You can build requirement specification structures manually, by creating requirement specifications and then creating individual requirements and paragraphs within the structure. Also, you can create entire requirement specification structures automatically, by importing existing source documents from Microsoft Word.

Within a requirement specification structure, you can organize requirements and paragraphs in a hierarchy that shows parent, child, and sibling relationships. You can change these relationships by moving items to higher and lower levels below the requirement specification. Also, you can remove items from a requirement specification structure, and you can delete requirements and paragraphs from the Teamcenter 8 MP1 database.

You use Word to create, edit, and view requirement and paragraph content. You can open the content in a separate Word window. If Microsoft Office Word 2007 is installed on your computer, and if certain other conditions are true, you can also open the content in an embedded Word window in the **Requirements View/Edit** pane.

To capture both the content and the organizational relationships of requirements and paragraphs, you can export those items to Microsoft Word. You can export an entire requirement specification structure, or only selected items within the structure. You can distribute the export document, for example, by e-mail, and you can save the document outside of Requirements Manager.

- **Associate requirements with design elements through trace links.**

A trace link establishes a directional relationship between two objects. In this relationship, one object defines a condition with which the other object must comply, that is, must partially or completely fulfill.

Within Requirements Manager, you can create defining and complying trace links between requirement specifications, requirements, and paragraphs. You can also create defining and complying trace links between Requirements Manager objects and objects in other Teamcenter applications, such as My Teamcenter, Structure Manager, and Multi-Structure Manager.

A given object may define some objects and may also comply with other objects. You can view an object's defining and complying relationships in the **Trace Link** pane, where you can also view the trace links themselves.

You can also generate a traceability report to view these defining and complying objects and trace links.

From both the **Trace Link** pane and the traceability report, you can navigate to a linked object. Also, you can delete trace links from this pane and report.

Building a requirement specification structure in Requirements Manager

A requirement specification is a container for requirements and paragraphs. These items can be structured in a hierarchy of parent, child, and sibling relationships.

To build a requirement specification structure, you first create an empty requirement specification. Then you add the structure by creating individual requirements and paragraphs.

For more information, see [Create a requirement specification](#), [Create a requirement](#), and [Create a paragraph](#).

Create a requirement specification

1. Choose **File→New→Requirements Spec**. Or, click the **Create a new requirements specification** button  on the toolbar.

The New Requirements Spec wizard appears.

2. In the right pane, select the type of requirements specification.
3. Click **Next**, and then do the following:
 - a. In the **Item ID** box, type a unique identifier for this requirement specification.
 - b. In the **Revision ID** box, type the current revision.
 - c. In the **Name** box, type the requirement specification name.

Tip

To fill in the **Item ID** and **Revision ID** boxes automatically, click **Assign**. Requirements Manager inserts the next identifier in the sequence and the current revision.


You can also type plain text in the **Description** box.

4. Click **Finish**.

Requirements Manager displays a new tab containing the empty requirement specification. The requirement specification occupies the top level in the structure.

You can click **Close** to close the New Requirements Spec wizard. Or, repeat steps 2 through 4 to create another requirement specification.

Create a requirement

1. Select the node where you want to create the requirement at the next lower level.
2. Choose **File**→**New**→**Requirement**. Or, click the **Create a new requirement** button  on the toolbar.

The New Requirement wizard appears.

3. In the right pane, select the type of requirement.
4. Click **Next**, and then do the following:
 - a. In the **Item ID** box, type a unique identifier in the following syntax:

REQ-*nnnnnn*

- b. In the **Revision ID** box, type the current revision.
- c. In the **Name** box, accept the default name or type a different name.

Tip

To fill in the **Item ID** and **Revision ID** boxes automatically, click **Assign**. Requirements Manager inserts the next identifier in the sequence and the current revision. The prefix **REQ-** precedes the identifier.

You can also type plain text in the **Initial Content** box. This text becomes the initial body of the requirement.

5. Click **Finish**.

The new requirement occupies the last position at the selected level.

You can click **Close** to close the New Requirements Spec wizard. Or, repeat steps 3 through 5 to create another requirement specification.

Importing a requirement specification structure from Microsoft Word

Import an existing Microsoft Word document to create a requirement specification structure in one action. Requirements Manager automatically generates a new requirement specification, complete with a hierarchy of parent, child, and sibling items. The items can be either requirements or paragraphs, depending on the subtype you choose.

Viewing a requirement specification structure

A requirement specification defines a hierarchical structure of requirements and paragraphs. These items can be nested from the primary level, directly below the requirement specification, to progressively subordinate levels.

A plus sign (+) appears to the left of each item that has one or more subordinates, or children, at the next lower level. You can view only these direct children, which may themselves have children that extend the structure to even lower levels. Or, you can view the entire structure below the item, displaying its direct children and all lower-level items simultaneously.

Generating a requirement specification structure from a Microsoft Word document

The requirement specification structure results from the numbered outline levels in the Word document. For each document paragraph that is formatted in an outline level style, level 1 through level 9, a separate item is created at the matching level in the hierarchical structure.

- The Word paragraph text becomes the item name, for example, the text of a paragraph formatted in a Word heading style.
- All material under the Word paragraph becomes the item content.
- The next outline level style starts another new item.

Parsing a document by outline levels only

Requirements Manager uses Word's numbered outline levels to parse the import document into multiple requirements. For each paragraph that is formatted in an outline level style, level 1 through level 9, a separate requirement is created in the folder that you select.


- The paragraph text becomes the requirement name, for example, the text of a paragraph formatted in a Word heading style.
- All material under the paragraph becomes the requirement content. The paragraph itself does not appear in the content.
- The next outline level style starts another new requirement.

Import a requirement specification structure

Note

- One of the following must be installed on your computer:
 - Microsoft Word 2003 with the Compatibility Pack for the Word, Excel, and PowerPoint 2007 file formats.
 - Microsoft Office Word 2007, with the **Word 12 Installed** preference set to **true**. To set this Teamcenter preference, choose **Edit**→**Options**, select **RequirementsManagement**, and select the **Word 12 Installed** check box.
- If you want to parse the document by keywords, Teamcenter's Extensions for Microsoft Office must be installed on your computer.

For more information, see ***Unsatisfied xref title***. If you have questions about Teamcenter's Extensions for Microsoft Office, consult your Teamcenter administrator.

1. Do one of the following:
 - Click the **Import a specification** link in the welcome pane.
 - Choose **File**→**Import Spec**.
 - Click the **Import Requirements Spec** button  on the toolbar.

The Import Spec wizard appears.

2. In the **File name** box, enter the full path of the file that contains the requirements.

You can click the browse button (...) to display the **Choose the file to import** dialog box. Browse to and select the file, and then click **Import** to fill in the **File name** field automatically.

Caution

You must specify a file that carries the **.docx** file name extension.

You can enter an optional description in the **Description** box.

3. Click **Next** to display the **Select Import Options** dialog box.
4. Do one of the following:
 - To parse the document by outline levels only:
 - a. Click **Import as single subtype** to display a list of subtypes.

- b. Select **Requirement**, **Paragraph**, or a custom subtype defined in your Teamcenter 8 MP1 environment.

The subtype you select is assigned to all requirements imported from the document.

- To parse the document by outline levels and keywords:

Note

Teamcenter's Extensions for Microsoft Office must be installed on your computer. If you have questions about this application, consult your Teamcenter administrator.

- a. Click **Use keywords for import**.

The **Keywords** box and **=** list become available.

- b. Type the keyword or keywords in the **Keywords** box.

Note

Use a comma to separate two keywords.

Tip

The keywords that you enter set the value of the **REQ_import_keywords** user preference. You cannot set the **REQ_import_keywords** site preference from the **Import Spec** wizard.

For more information, see ***Unsatisfied xref title***.

- c. In the **=** list, select the subtype to assign to each requirement imported from the document.

5. Click **Finish**.

Requirements Manager displays a new tab with the requirement specification as the root item. Below the requirement specification, the structure consists of parent, child, and sibling items according to the outline levels in the import document.


Organize a requirement specification structure

Within a requirement specification structure, requirements and paragraphs can be organized in multiple levels of parents, children, and siblings. The **Specification Structure** column shows this hierarchy, with a plus sign (+) for item that has one or more children at lower levels.

You can move items to higher and lower levels, thereby changing their relationships to other items in the structure. When you move a parent item, you also move its direct children and lower-level descendants.

1. Select each item that you want to move to the destination level.


You can select multiple items by using the standard Windows functions.

2. Choose **Edit**→**Cut**. Or, click the **Cut** button  on the toolbar.

The selection is moved to the Clipboard.

3. Do one of the following:

- To place the selection at the top level of the structure, directly below the root, select the requirement specification.
- To place the selection at the next level below another item, select the intended parent item.

4. Choose **Edit**→**Paste**. Or, click the **Paste** button  on the toolbar.

The moved items are placed after any existing items at the specified level.

Editing requirement content

The content of a requirement is stored in a full-text dataset that is associated with the requirement object. You access that content through a temporary Microsoft Word file. There are two ways to generate such a file:

- In a Word window embedded in the **Requirements View/Edit** view
- In a separate Word window

Entering and changing content

As in a typical Word file, you can enter and change content elements such as:

- Headings, body paragraphs, lists, and hyperlinks
- Tables and graphics
- Equations, symbols, and other special characters

You can copy, move, and delete selected portions through the standard Word functions.

Edit content in the Requirements View/Edit view


1. To open the **Requirements View/Edit** view, do one of the following:
 - Choose **View**→**Show Requirements View/Edit**.
 - Choose **Window**→**Show View**→**Requirements View/Edit**.
 - Choose **Window**→**Show View**→**Other**→**Teamcenter**→**Requirements View/Edit**.
 - Click the **Show/Hide Requirements View/Edit** button on the toolbar.

2. Select the requirement.


The **Requirements View/Edit** view displays the content in an embedded Word window.

3. Place the cursor in the window, and use the standard Word functions to enter, change, or format the content.

If you did not check out the full-text dataset explicitly, Requirements Manager checks out the dataset implicitly to your user ID.

4. To save the content in the database, click the **Save** button  at the top of the **Requirements View/Edit** view.

Warning

Do not use Word functions for this action. You must click the **Save** button  at the top of the Requirements Manager **Requirements View/Edit** view to save your edits.

If you did not check out the full-text dataset explicitly, the dataset remains checked out implicitly to your user ID. When you select another object in the structure view or exit Requirements Manager, the dataset is checked in implicitly.

If you checked out the full-text dataset explicitly, it remains checked out. You must explicitly check in the dataset.

For more information, see [Check in a requirement explicitly](#).

Note


When the **Requirements View/Edit** view is active, Requirements Manager displays only the **File** menu and the **Window** menu. To restore the other menus, deactivate the **Requirements View/Edit** view by activating another view. For example, to activate the structure view, click the **Requirements Manager** tab or an item in the structure.

Edit content in a separate Word window

Note

One of the following must be installed on your computer:

- Microsoft Word 2003 with the Compatibility Pack for the Word, Excel, and PowerPoint 2007 file formats.
- Microsoft Office Word 2007.

1. Select the requirement in the structure view.
2. Choose **File**→**Open Text**, or click the **Open Requirement Text** button  on the toolbar.

Note

This feature is not supported in Teamcenter 8 MP1 for UNIX platforms.

The requirement opens in a separate Word window.

Note

If you did not check out the full-text dataset explicitly, Requirements Manager checks out the dataset implicitly to your user ID.

3. Use the standard Word functions to enter, change, or format the content.
4. To save the content in the database, pull down Word's **File** menu and choose **Save**, or click the **Save** button on Word's toolbar.

If you did not check out the full-text dataset explicitly, the dataset remains checked out implicitly to your user ID when you select another object in the structure view or exit Requirements Manager. You must close the Word window to check in the dataset implicitly.

If you checked out the full-text dataset explicitly, it remains checked out. You must explicitly check in the dataset.

For more information, see [Check in a requirement explicitly](#).

Viewing requirement content

For each requirement and paragraph in a requirement specification structure, you can view the content in two ways:

- In a Microsoft Word window embedded in the **Requirements View/Edit** view
- In a separate Word window

View content in the Requirements View/Edit view

1. To open the **Requirements View/Edit** view, do one of the following:
 - Choose **View→Show Requirements View/Edit**.
 - Choose **Window→Show View→Requirements View/Edit**.
 - Choose **Window→Show View→Other→Teamcenter→Requirements View/Edit**.
 - Click the **Show/Hide Requirements View/Edit** button on the toolbar.
2. Select the requirement.

The **Requirements View/Edit** view displays the content in an embedded Word window.


Note

When the **Requirements View/Edit** view is active, Requirements Manager displays only the **File** menu and the **Window** menu. To restore the other menus, deactivate the **Requirements View/Edit** view by activating another view. For example, to activate the structure view, click the **Requirements Manager** tab or an item in the structure.

View content in a separate Word window

Note

One of the following must be installed on your computer:

- Microsoft Word 2003 with the Compatibility Pack for the Word, Excel, and PowerPoint 2007 file formats
- Microsoft Office Word 2007
- Select the requirement, and then choose **File**→**Open Text** or click the **Open Requirement Text** button  on the toolbar.

Note

This feature is not supported in Teamcenter 8 MP1 for UNIX platforms.

The content opens in a separate Word window.

Note

- If you did not check out the full-text dataset explicitly, Requirements Manager checks out the dataset implicitly to your user ID. The dataset remains implicitly checked out when you select another object in the structure view or exit Requirements Manager. You must close the Word window to check in the dataset implicitly.
- If you checked out the full-text dataset explicitly, it remains checked out. You must explicitly check in the dataset.

For more information, see [Check in a requirement explicitly](#).

Exporting requirement structures

You can use Requirements Manager or My Teamcenter to export specification data, and you can export one or more objects.

The overall style for the generated document comes from the specification template:

- Rules and keywords in the specification template are applied to the first object of the structure.
- The first object of the structure uses the specification template managed by IRDC, unless the user chooses another template at runtime.
- When there is no IRDC-associated template, the default is used.

When you select a specification for export in Requirements Manager:

- All the objects under specification are exported.
- Rules specified in the object template are applied to each exported object.
- Property keywords in the object template are replaced with corresponding attribute values of the specification object.

When you select a single specification element such as a requirement or paragraph for export in Requirements Manager:

- All the objects subsumed under the selected specification element are exported.
- Rules specified in the object template are applied to each exported object.
- Property keywords in the object template are replaced with corresponding attribute values of the specification element object.

When you select more than one specification element objects for export in Requirements Manager:

- Only the selected objects are exported. Subsidiary elements under each selected object are not exported.
- Rules specified in object template are applied to each exported object.
- Property keywords in the object template are replaced with the corresponding attribute values of the first specification element object.

When you select a single object for export in My Teamcenter:

- The object template, if managed by an Item Revision Definition Configuration (IRDC) object, is used for export unless you choose otherwise.
- When there is no IRDC-associated template, the default is used.
- Property keywords in the object template are replaced with corresponding attribute values of the specification element object.

When you select multiple objects for export in My Teamcenter:

- Only the selected objects are exported.
- The default object template is used for export unless you choose otherwise.
- Rules specified in object template are applied to each exported object.
- Property keywords in the object template are replaced with corresponding attribute values of the top specification element object.

Export requirements

Note


One of the following must be installed on your computer:

- Microsoft Word 2003 with the Compatibility Pack for the Word, Excel, and PowerPoint 2007 file formats
- Microsoft Office Word 2007, with the **Word 12 Installed** preference set to **true**. To set this Teamcenter preference, choose **Edit**→**Options**, select **RequirementsManagement**, and select the **Word 12 Installed** check box.

1. Choose the context in the structure by doing one of the following:
 - To export all items at all levels, select only the requirement specification.
 - To export one item at any level (including any direct children and lower level descendants), select only the item.
 - To export two or more items, at the same level or at different levels, use the standard Windows functions for multiple selection.

Note

The selection cannot include the requirement specification.

2. Choose **File**→**Export Spec**. Or, click the **Export Requirements Spec** button  on the toolbar.

A read-only Word document opens, with content for each item in the selected context. You can create a permanent document by pulling down Word's **File** menu and choosing **Save As** to use the **Save As** dialog box.

Remove requirements from a requirement specification structure


Requirements remain in the Teamcenter database after you remove them from a requirement specification structure in Requirements Manager. For example, they stay in My Teamcenter if you previously save them there. You can also use the **Search** feature to recall the requirements.

Note

To delete requirements from the database, you must switch to My Teamcenter. When you delete requirements in My Teamcenter, they are deleted also from other Teamcenter applications and they cannot be recalled by using the **Search** feature.

1. Select the requirements that you want to remove.

You can select multiple requirements by using the standard Windows functions. Or, select the requirement specification itself to remove the entire structure.

2. Choose **Edit→Remove**. Or, click the **Remove a line** button  on the toolbar.

The **Removing lines** dialog box appears.

3. Click **Yes**.

A progress indicator appears during this operation, which you can abort by clicking **Stop**.

Associating requirements with design elements through trace links

Note

You must configure the trace link features before you can create trace links, use the Requirements Manager **Trace Link** pane, or generate a traceability report. To configure these features, choose **Edit→Options**, select **RequirementsManagement**, and select the **Tracelink Mode** check box.

This action sets the **Tracelink_Edit_enabled** Teamcenter preference to **true**. That setting also configures trace link features for Teamcenter applications such as My Teamcenter, Structure Manager, and Multi-Structure Manager.

A trace link creates a directional relationship between two objects, a relationship conveyed by the terms *defining* and *complying*. A defining object specifies a condition that a product or a component must fulfill. A complying object must partially or completely fulfill a condition specified by a defining object. Such a relationship establishes a traceable path in which one object precedes the other.

For example, functional requirement **A**, for target tracking, defines hardware requirement **B**, for a CPU with a certain instruction rate. In this example:

- Requirement **A** precedes requirement **B**, with requirement **B** directly *downstream* in the complying path.
- Requirement **B** succeeds requirement **A**, with requirement **A** directly *upstream* in the defining path.

An object can assume both defining and complying relationships, continuing the path upstream and downstream. For example, a weight requirement may define a requirement to use aluminum. That complying requirement may in turn define temperature or environmental requirements consistent with the properties of aluminum. An object can have any number of defining and complying trace links.

Traceability relationships allow for change analysis in both directions. For example, if the customer is considering a change to a product requirement, its trace links can be followed downstream, to all complying requirements that were derived from the product requirement, and eventually to all design elements that must comply. Conversely, an engineer working on a design element that must meet detailed, low level requirements can follow those trace links upstream, to the original customer requirements that define the design constraints.

Working with trace links involves creating, viewing, and deleting trace links, generating traceability reports, and navigating to linked objects.

Linking workspace objects

A trace link establishes a path in which one object takes precedence over another. The predecessor, the defining object, is the trace link source. The successor, the complying object, is the target.

Only one trace link of a given subtype is allowed between the same two objects in the same direction. However, in a given direction between two objects, you can create as many trace links as the number of available trace link subtypes.

A given object can have both defining and complying relationships with other objects. Defining and complying trace links can relate directly and indirectly to the object selected in the structure pane.


Source and target objects

Trace links can be created between:

- One source object and one target object. The source has one defining trace link to the target, which has one complying trace link from the source.
- One source object and multiple target objects. The source has one defining trace link to each target. Each target has one complying trace link from the source.
- Multiple source objects and one target object. Each source has one defining trace link to the target, which has one complying trace link from each source.

Within Requirements Manager, source and target objects can be requirement specifications, requirements, and paragraphs. The source and target objects can be in different requirement specification structures or in the same structure.

Tip

In Requirements Manager, you can view the source and target objects in separate panes at the same time. For example, with the source object structure displayed in the structure pane, right-click the tab for the target object structure and choose **Open Structure in Lower Panel**. You can also use the **View→Show Lower Structure Panel** menu command, or click the **Show/Hide the lower Structure Panel** button  on the toolbar. If necessary, click the tab for the structure that you want to see in the upper pane.




Objects in other Teamcenter applications, such as My Teamcenter, Structure Manager, and Multi-Structure Manager, can be both sources and targets of trace links for Requirements Manager objects.

Create trace links

1. Select the source object, or select multiple objects by using the standard Windows functions.

Note


If you select only one source object, you can create trace links to multiple target objects. If you select multiple source objects, you can create trace links to only one target object.

2. Choose **Tools→Trace Link→Start Tracelink**, click the **Start Trace Link Creation** button  on the toolbar, or right-click the selection and choose **Trace Link→Start Tracelink**.
3. Select the target object, or select multiple objects by using the standard Windows functions.
4. Specify the trace link subtype and name by doing one of the following:
 - To accept the default subtype and name, choose **Tools→Trace Link→End Tracelink**, click the **End Trace Link Creation** button  on the toolbar, or right-click the selection and choose **Trace Link→End Tracelink**.
 - To assign a custom subtype and name:
 - a. Choose **Tools→Trace Link→End Tracelink...**, click the **End Trace Link Creation with Subtype** button  on the toolbar, or right-click the selection and choose **Trace Link→End Tracelink...**.

The **Create Trace Link with Subtype** dialog box appears.

- b. In the list of subtypes on the left, select the subtype to assign to each trace link.
- c. In the **Name** box, type the name to assign to each trace link.

In the **Description** box, you can type plain text as additional information.

A trace link symbol  is shown for each defining and complying object. To view a defining or complying path, use the **Trace Link** pane or a traceability report.

For more information, see [View defining and complying relationships](#) or [Generate a traceability report](#).

Delete a trace link

1. In the **Trace Link** pane or the **Traceability Report** window, select the trace link in the **Defining Object** or **Complying Object** column.

If necessary, click the **Show Tracelink** button  to display the defining and complying trace links.

2. Click the **Delete Tracelink** button  at the bottom of the pane or window.

The trace link is deleted from the Teamcenter database.

For more information, see [View defining and complying relationships](#) or [Generate a traceability report](#).

Activities (“Activity” if only one is listed)

- Activity title
- Activity title
- ...

Review questions

1. Multiple choice question?

Select all that apply.

- Incorrect answer
- Correct answer
- Correct answer
- Incorrect answer

2. True/False question?

Select one answer.

- True
- False

Style notes to writers:

- The type of question can be “Select one answer” or “Select all that apply.” A multiple choice question, for example, could be either a “Select one answer” or a “Select all that apply” type. A True/False question, for example, would be a “Select one answer” type.
- Always list True first in the answer list for True/False questions.

Note

Limit the number of True/False questions. These give the student a 50/50 chance at the right answer.

- Follow the style guide rules for lists, including initial cap and use of periods.
- Record the correct answer(s) to the questions, and a brief explanation, in the instructor notes.

Summary

The following topics were taught in this lesson:

- Topic description/importance.
-

Lesson

2 *Course summary*

During this course, you met the course objectives by accomplishing the following:

- You ...
-

Summary project

Courses do not require a summary project. If a summary project is created for the course, define it here.

High level description of the entire project.

- Activity title.
- Activity title.
- ...

Lesson

3 *Lesson title*

Purpose

The purpose of this lesson is to ...

Objectives

After you complete this lesson, you should be able to:


-
-

Help topics

Additional information for this lesson can be found in:

- *[Getting Started with Teamcenter 2007](#)*
-

Create a paragraph

1. Select the node where you want to create the paragraph at the next lower level.
2. Choose **File→New→Paragraph**. Or, click the **Create a new paragraph** button  on the toolbar.

The New Paragraph wizard appears.

3. In the right pane, select the type of paragraph.
4. Click **Next**, and then do the following:
 - a. In the **Item ID** box, type a unique identifier for this paragraph.
 - b. In the **Revision ID** box, type the current revision.
 - c. In the **Name** box, accept the default name or type a different name.

Tip

To fill in the **Item ID** and **Revision ID** boxes automatically, click **Assign**. Requirements Manager inserts the next identifier in the sequence and the current revision.

You can also type plain text in the **Initial Content** box. This text becomes the initial body of the paragraph.

5. Click **Finish**.

The new paragraph occupies the last position at the selected level.

You can click **Close** to close the New Requirements Spec wizard. Or, repeat steps 3 through 5 to create another requirement specification.

Formatting content

Manual formatting is retained in the database when you close the temporary file. You can apply manual formatting through Word's **Format** menu and formatting toolbar.

The Word styles that the database retains are governed by the document (**.docx**) that is attached to the dataset for the **REQ_default_styles_template** item. Each time you open a given requirement or paragraph, the settings from the **.docx** file are applied. Therefore, changes to styles in the temporary file do not affect the content in the database. Although you can modify and create styles, and apply them with visible results in Word, such changes are not retained when you close the file. Nor is it effective to modify Word template settings or to attach other templates.

Furthermore, page setup modifications have no effect in the database. Changes to margins, paper, layout, or headers and footers are not retained beyond the temporary Word session.

Exporting requirements to Microsoft Word

To capture requirement and paragraph content for analysis and distribution, you can export items to Microsoft Word. For each item that you specify, Requirements Manager extracts the content from the database to a temporary Word document.

You can view and print this document and send it by e-mail and fax. Also, you can save the document, for example, on a local or shared drive, where the content can be edited independently of Requirements Manager. The saved document can be imported to automatically create a new requirements specification structure.

Extracting requirement content to a Word document

The content is extracted according to a particular context within the requirement specification structure. You can choose one of the following:

- Export all items at all levels of the structure.

The document includes content for all direct children and lower-level descendants of each parent item. In this context, you see the content according to the organization within the entire structure.

- For each item at the top level, the item name is extracted to a Word paragraph that is formatted in the Heading 1 style. The item content is placed under the heading.
- For each child and descendant, the item name is formatted in a Word heading style that matches the item's level in the structure. The item content is placed under the heading.

The export document file name is the name of the requirement specification structure.

- Export one item at any level of the structure.

The document includes content for all of the item's direct children and lower-level descendants, if any. In this context, you see the content according to the relationships in the structure below the parent.

- For the parent, the item name is extracted to a Word paragraph that is formatted in the Heading 1 style. The item content is placed under the heading.
- For each direct child, the item name is formatted in Word's Heading 2 style, and the content is placed under the heading.
- For each lower-level descendant, the item name is formatted in the heading style that matches the level in the structure. The content is placed under the heading.

The export document file name is the name of the requirement or paragraph item.

- Export two or more items, at the same level or at different levels.

The document does not include content for direct children and lower-level descendants. In this context, you see only the content of the selected items, regardless of any hierarchical relationships to other items.

For each item, the item name is formatted in Word's Heading 1 style, and the content is placed under the heading. Headings appear in the order in which the items are displayed in the structure.

The export document file name is the name of the requirement specification item.

Certain Word formatting styles are applied to the exported content by default. These styles are specified in the Word document (**.docx**) that is attached to the dataset for the **REQ_default_styles_template** item.

Document export modes

The following export modes are available:

- Static document using specification template and object template.

You can specify a particular specification and object template to create document in a desired style and format.

The exported document contains various Teamcenter objects and their properties.

- Live document using specification template and object template.

You can edit object properties and changes are saved in Teamcenter when the document is saved.

The exported document contains various Teamcenter objects and their properties.

Export a document for live editing

In the rich client, you can export a document for live editing from My Teamcenter or Requirements Manager

1. Select the document you want to export and edit.

2. Choose **Tools® Export® Objects to Word**.

The **Export to Word** dialog box is displayed.

3. Specify the **Output** to be **Live Integration with Word**.

4. Select the appropriate options for the following:

- **Specification Template**

A specification export template determines which objects to export, their structure in the document, and the formatting that is applied to the objects. This template can also contain layout elements such as a title page, a table of contents, and headers and footers.

- **Override Object Template for:**

You can specify a section for which to apply a different object template.

- **Available Object Templates**

An object export template determines the properties that are exported for the objects. This template can also contain standard text or boilerplate in which properties can be inserted.

A Word document opens with content for each item in the selected context. You can edit text and property values and, when you save and close the document, changes to Teamcenter objects and their properties are saved in Teamcenter.

Note

The rich client must be running during document editing. A document that is saved locally becomes static with no connectivity.

Activities (“Activity” if only one is listed)

- Activity title
- Activity title
- ...

Review questions

1. Multiple choice question?

Select all that apply.

- Incorrect answer
- Correct answer
- Correct answer
- Incorrect answer

2. True/False question?

Select one answer.

- True
- False

Style notes to writers:

- The type of question can be “Select one answer” or “Select all that apply.” A multiple choice question, for example, could be either a “Select one answer” or a “Select all that apply” type. A True/False question, for example, would be a “Select one answer” type.
- Always list True first in the answer list for True/False questions.

Note

Limit the number of True/False questions. These give the student a 50/50 chance at the right answer.

- Follow the style guide rules for lists, including initial cap and use of periods.
- Record the correct answer(s) to the questions, and a brief explanation, in the instructor notes.

Summary

The following topics were taught in this lesson:

- Topic description/importance.
-

Lesson

4 *Viewing Requirements*

Purpose

The purpose of this lesson is to ...

Objectives

After you complete this lesson, you should be able to:

-
-

Help topics

Additional information for this lesson can be found in:

- [*Getting Started with Teamcenter 2007*](#)
-

View only the direct children of an item

- Click the plus sign (+) to the left of the item.

The direct children are displayed at the next lower level. The item's plus sign becomes a minus sign (–), which you can click to hide the children.

View the entire structure below an item

- Select the item and choose **View→Expand Below**.

Items at all lower levels are displayed.

You can reverse this action by using the **View→Collapse Below** menu command.

Activities (“Activity” if only one is listed)

- Activity title
- Activity title
- ...

Review questions

1. Multiple choice question?

Select all that apply.

- Incorrect answer
- Correct answer
- Correct answer
- Incorrect answer

2. True/False question?

Select one answer.

- True
- False

Style notes to writers:

- The type of question can be “Select one answer” or “Select all that apply.” A multiple choice question, for example, could be either a “Select one answer” or a “Select all that apply” type. A True/False question, for example, would be a “Select one answer” type.
- Always list True first in the answer list for True/False questions.

Note

Limit the number of True/False questions. These give the student a 50/50 chance at the right answer.

- Follow the style guide rules for lists, including initial cap and use of periods.
- Record the correct answer(s) to the questions, and a brief explanation, in the instructor notes.

Summary

The following topics were taught in this lesson:

- Topic description/importance.
-

Lesson

5 *Edit Requirements*

Purpose

The purpose of this lesson is to ...

Objectives

After you complete this lesson, you should be able to:

-
-

Help topics

Additional information for this lesson can be found in:

- [*Getting Started with Teamcenter 2007*](#)
-

Check out a requirement explicitly

1. In My Teamcenter, select the full-text dataset associated with the requirement object.

Tip

To see if the dataset is checked out by another user, right-click the dataset in My Teamcenter and choose **Properties**. The **Checked Out** box displays either **Y** or **N**. If **Y** is displayed, the **Checked Out User ID** box displays the user.

2. Choose **Tools**→**Check-In/Out**→**Check-Out**.

Note

If the dataset is already checked out by another user, a message states that the dataset will be opened in read-only mode and changes will not be saved.

3. Right-click the requirement and choose **Send To**→**Requirements Manager**.

The requirement is highlighted in the Requirements Manager structure view.

Check in a requirement explicitly

1. In My Teamcenter, select the full-text dataset associated with the requirement object.
2. Choose **Tools**→**Check-In/Out**→**Check-In**.

Activities (“Activity” if only one is listed)

- Activity title
- Activity title
- ...

Review questions

1. Multiple choice question?

Select all that apply.

- Incorrect answer
- Correct answer
- Correct answer
- Incorrect answer

2. True/False question?

Select one answer.

- True
- False

Style notes to writers:

- The type of question can be “Select one answer” or “Select all that apply.” A multiple choice question, for example, could be either a “Select one answer” or a “Select all that apply” type. A True/False question, for example, would be a “Select one answer” type.
- Always list True first in the answer list for True/False questions.

Note

Limit the number of True/False questions. These give the student a 50/50 chance at the right answer.

- Follow the style guide rules for lists, including initial cap and use of periods.
- Record the correct answer(s) to the questions, and a brief explanation, in the instructor notes.

Summary

The following topics were taught in this lesson:

- Topic description/importance.
-

Lesson

6 *Trace Links*

Purpose

The purpose of this lesson is to ...

Objectives

After you complete this lesson, you should be able to:

-
-

Help topics

Additional information for this lesson can be found in:

- [*Getting Started with Teamcenter 2007*](#)
-

Trace link subtypes

When you create a trace link, you can accept the default subtype, **Trace Link**. Or, you can assign a custom subtype, created in the Business Modeler IDE by a Teamcenter administrator.

Custom subtypes allow you to create two or more trace links between the same objects in the same direction, if you assign a different subtype to each trace link. For example, a trace link from defining requirement **A** to complying requirement **B** has the **Trace Link** subtype. A second defining trace link, with the custom subtype **S**, can be created from requirement **A** to complying requirement **B**.

Trace links of the same subtype are allowed in both directions between the same objects. For example, defining requirement **A** is linked to complying requirement **B**, with the **Trace Link** subtype assigned to the trace link. You can create a trace link of the same subtype to link requirement **B**, as the defining object, back to requirement **A** as the complying object, completing circular trace links.

Direct trace links

Direct trace links are connected to the object selected in the structure pane:

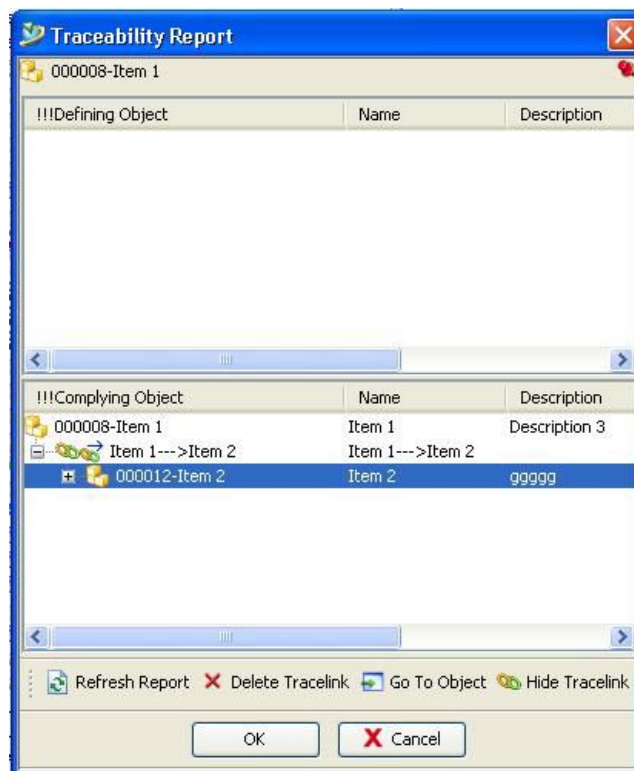
- A direct defining trace link starts at the object itself. The object is the trace link source.
- A direct complying trace link ends at the object itself. The object is the trace link target.

For example, assume that:

- An object named **Item 1** defines **Item 2**.
- **Item 1** is selected in the structure pane.
- A traceability report is generated for **Item 1**.

For more information, see [Generate a traceability report](#).

The following figure shows the traceability report for this example.




Direct trace link example

In the **Complying Object** pane:

- **Item 1** is shown as the defining object that begins the complying path.
- The direct trace link is shown below **Item 1**.

- Below the trace link, **Item 2** is shown as the successor in the complying path.

Note

The direct trace link symbol  indicates that the trace link is connected to the defining and complying objects themselves.

Indirect trace links

The indirect trace link concept allows all revisions of an item to implicitly inherit all trace links to the item itself. Indirect trace links are connected to the item that is associated with the item revision selected in the structure pane:

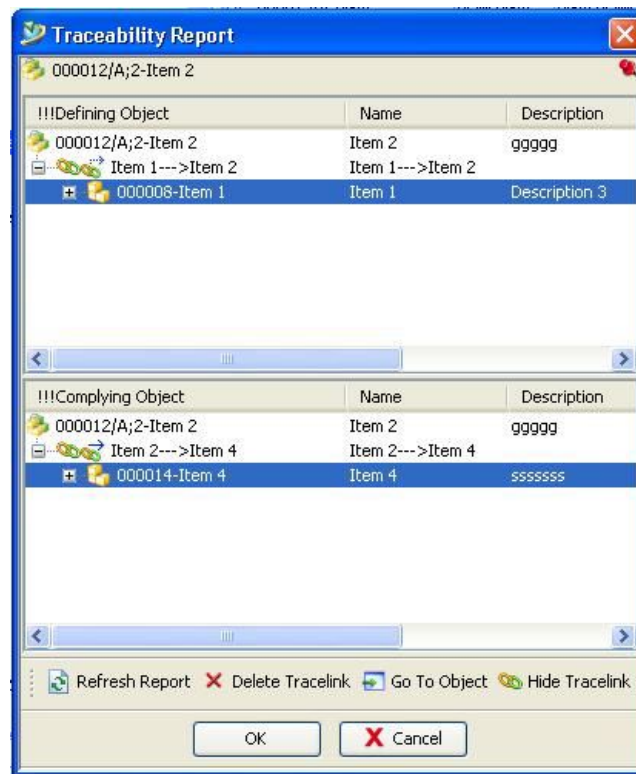
- An indirect defining trace link starts at the item. The item is the trace link source.
- An indirect complying trace link ends at the object that complies with the item. That object is the trace link target.

For example, assume that:

- An item named **Item 1** defines **Item 2**.
- **Item 2** has an item revision named **2–Item 2**.
- Item revision **2–Item 2** defines an item named **Item 4**.
- The object selected in the structure pane is **2–Item 2**.
- A traceability report is generated for **2–Item 2**.

For more information, see [Generate a traceability report](#).

The following figure shows the traceability report for this example.



Indirect trace link example


In the **Defining Object** pane:

- **2-Item 2** is shown as the first object because it is selected.
- The trace link shown below **2-Item 2** is indirect because it is actually indirectly connected to **Item 1** through the trace link to **Item 2**.
- Below the indirect trace link, **Item 1** is shown as the predecessor to **Item 2** in the defining path.

In the **Complying Object** pane:

- Item revision **2-Item 2** is shown as the defining object that begins the complying path.
- The direct trace link is shown below item revision **2-Item 2**.
- Below the trace link, **Item 4** is shown as the successor in the complying path.

Note

The indirect trace link symbol  indicates that the trace link is connected to the item associated with the item revision selected in the structure pane.

View defining and complying relationships



Defining and complying paths are shown in the **Trace Link** pane, where you can view the direct and indirect predecessors or successors in a path. You can also view the trace links themselves, as separate objects.

1. With the **Trace Link** pane displayed, select the object in the structure pane.

The **Defining Object** column shows the name of the selected object at the top. Immediately below, the column shows the objects that define the selected object, its predecessors in the defining path. A plus sign (+) is shown for each predecessor that complies with other objects, continuing the path upstream.

The **Complying Object** column shows the name of the selected object at the top. Immediately below, the column shows the objects that comply with the selected object, its successors in the complying path. A plus sign (+) is shown for each successor that defines other objects, continuing the path downstream.


Note

- The direct trace link symbol  indicates that the trace link relates to the selected object itself.
- The indirect trace link symbol  indicates that the trace link relates to the revision or item that is associated with the selected object.

For more information, see [Direct trace links](#) and [Indirect trace links](#).

Tip

If necessary, click the **Refresh Report** button  to synchronize the **Trace Link** pane with the selected object.


2. Do any or all of the following:
 - To display the defining and complying trace links, click the **Show Tracelink** button . The button label changes to **Hide Tracelink**, which you can click to display only the defining and complying objects.
 - To view the defining or complying objects below a trace link, click the plus sign (+) for the trace link.
 - To view the predecessors or successors below a defining or complying object, click the plus sign (+) for the object.

Note

You can open the **Trace Link** pane in a separate window by right-clicking the **Trace Link** tab and choosing **Detach Data Tab**.



Generate a traceability report

A traceability report displays defining and complying relationships for an object. You use this report to view the defining and complying paths in the same way as you use the **Trace Link** pane. For more information, see [View defining and complying relationships](#).

1. In the structure pane, select the object for which you want to generate the report.
2. Choose **Edit→Traceability Report**, click the **Traceability Report** button  on the toolbar, or right-click the object and choose **Edit→Traceability Report**.

The **Traceability Report** window appears.

Note

- The direct trace link symbol  indicates that the trace link relates to the selected object itself.
- The indirect trace link symbol  indicates that the trace link relates to the revision or item that is associated with the selected object.

For more information, see [Direct trace links](#) and [Indirect trace links](#).

Navigate to a linked object

1. In the **Trace Link** pane or the **Traceability Report** window, select the object in the **Defining Object** or **Complying Object** column.

If necessary, click the **Hide Tracelink** button  to display the defining and complying objects.

2. Click the **Goto Object** button  at the bottom of the pane or window.

The object is displayed and highlighted in the Teamcenter application from which it is linked.

For more information, see [View defining and complying relationships](#) or [Generate a traceability report](#).

Activities (“Activity” if only one is listed)

- Activity title
- Activity title
- ...

Review questions

1. Multiple choice question?

Select all that apply.

- Incorrect answer
- Correct answer
- Correct answer
- Incorrect answer

2. True/False question?

Select one answer.

- True
- False

Style notes to writers:

- The type of question can be “Select one answer” or “Select all that apply.” A multiple choice question, for example, could be either a “Select one answer” or a “Select all that apply” type. A True/False question, for example, would be a “Select one answer” type.
- Always list True first in the answer list for True/False questions.

Note

Limit the number of True/False questions. These give the student a 50/50 chance at the right answer.

- Follow the style guide rules for lists, including initial cap and use of periods.
- Record the correct answer(s) to the questions, and a brief explanation, in the instructor notes.

Summary

The following topics were taught in this lesson:

- Topic description/importance.
-

Lesson

7 *Lesson title*

Purpose

The purpose of this lesson is to ...

Objectives

After you complete this lesson, you should be able to:

-
-

Help topics

Additional information for this lesson can be found in:

- *[Getting Started with Teamcenter 2007](#)*
-

Main topic





You need to decide if the topic type will be just primary (the default setting) or a split screen for the presentation. It would be an exception to ever set the topic type to secondary.

One or two line definition.

Description, List, and/or Graphic

User Settings – infodba

(example graphic)

	 Administrative settings		
 Session	<input checked="" type="checkbox"/> Administration Logging		
 Login	<input type="checkbox"/> Security Logging		
 Person	<input type="checkbox"/> Bypass		
<input checked="" type="checkbox"/> Administrative			
	OK	Apply	Cancel

Key points

A key points section is optional.

- Use complete sentences here. Be consistent.
-

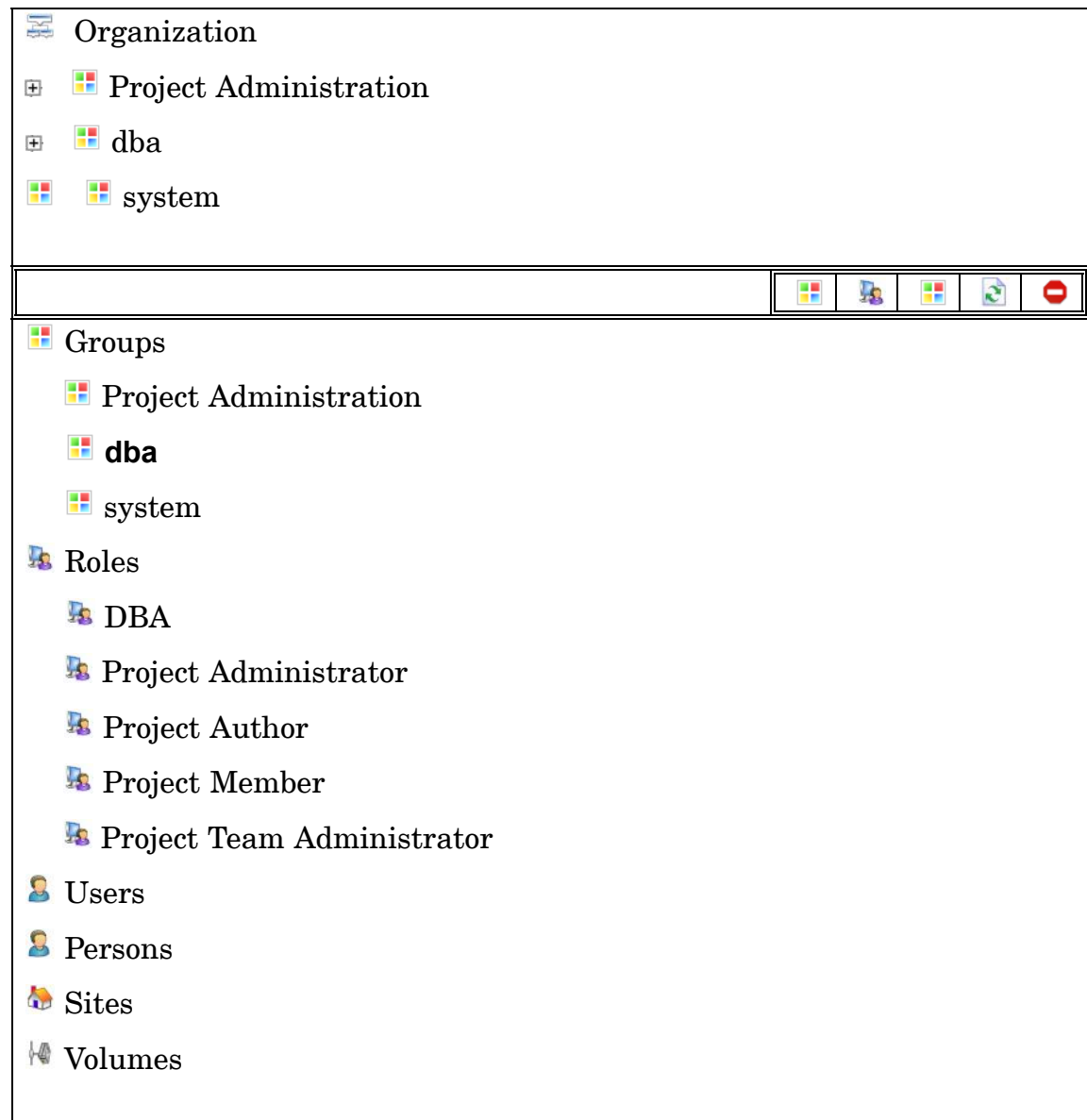
Subtopic

One line definition.

Description, List, and/or Graphic

Organization

(example graphic)



Key points

A key points section is optional.

- Use complete sentences here. Be consistent.
-

Activities (“Activity” if only one is listed)

- Activity title
- Activity title
- ...

Review questions

1. Multiple choice question?

Select all that apply.

- Incorrect answer
- Correct answer
- Correct answer
- Incorrect answer

2. True/False question?

Select one answer.

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- Always list True first in the answer list for True/False questions.

Note

Limit the number of True/False questions. These give the student a 50/50 chance at the right answer.

- Follow the style guide rules for lists, including initial cap and use of periods.
- Record the correct answer(s) to the questions, and a brief explanation, in the instructor notes.

Summary

The following topics were taught in this lesson:

- Topic description/importance.
-

Lesson

8 *Lesson title*

Purpose

The purpose of this lesson is to ...

Objectives

After you complete this lesson, you should be able to:

-
-

Help topics

Additional information for this lesson can be found in:

- *[Getting Started with Teamcenter 2007](#)*
-

Main topic





You need to decide if the topic type will be just primary (the default setting) or a split screen for the presentation. It would be an exception to ever set the topic type to secondary.

One or two line definition.

Description, List, and/or Graphic

User Settings – infodba

(example graphic)

	 Administrative settings		
 Session	<input checked="" type="checkbox"/> Administration Logging		
 Login	<input type="checkbox"/> Security Logging		
 Person	<input type="checkbox"/> Bypass		
<input checked="" type="checkbox"/> Administrative			
	OK	Apply	Cancel

Key points

A key points section is optional.

- Use complete sentences here. Be consistent.
-

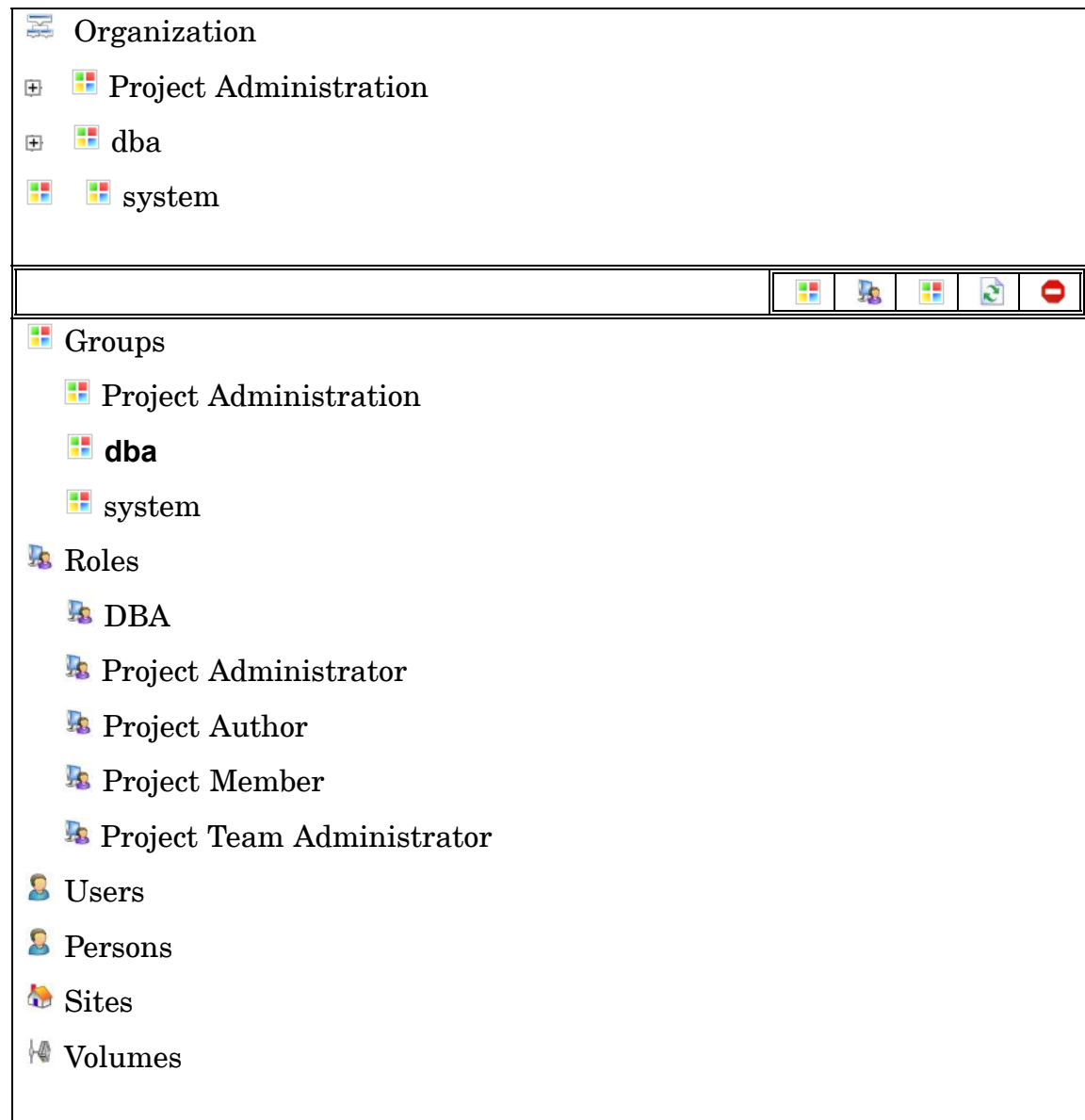
Subtopic

One line definition.

Description, List, and/or Graphic

Organization

(example graphic)



Key points

A key points section is optional.

- Use complete sentences here. Be consistent.
-

Activities (“Activity” if only one is listed)

- Activity title
- Activity title
- ...

Review questions

1. Multiple choice question?

Select all that apply.

- Incorrect answer
- Correct answer
- Correct answer
- Incorrect answer

2. True/False question?

Select one answer.

- True
- False

Style notes to writers:

- The type of question can be “Select one answer” or “Select all that apply.” A multiple choice question, for example, could be either a “Select one answer” or a “Select all that apply” type. A True/False question, for example, would be a “Select one answer” type.
- Always list True first in the answer list for True/False questions.

Note

Limit the number of True/False questions. These give the student a 50/50 chance at the right answer.

- Follow the style guide rules for lists, including initial cap and use of periods.
- Record the correct answer(s) to the questions, and a brief explanation, in the instructor notes.

Summary

The following topics were taught in this lesson:

- Topic description/importance.
-

Lesson

9 *Lesson title*

Purpose

The purpose of this lesson is to ...

Objectives

After you complete this lesson, you should be able to:

-
-

Help topics

Additional information for this lesson can be found in:

- *[Getting Started with Teamcenter 2007](#)*
-

Main topic





You need to decide if the topic type will be just primary (the default setting) or a split screen for the presentation. It would be an exception to ever set the topic type to secondary.

One or two line definition.

Description, List, and/or Graphic

User Settings – infodba

(example graphic)

	 Administrative settings		
 Session	<input checked="" type="checkbox"/> Administration Logging		
 Login	<input type="checkbox"/> Security Logging		
 Person	<input type="checkbox"/> Bypass		
<input checked="" type="checkbox"/> Administrative			
	OK	Apply	Cancel

Key points

A key points section is optional.

- Use complete sentences here. Be consistent.
-

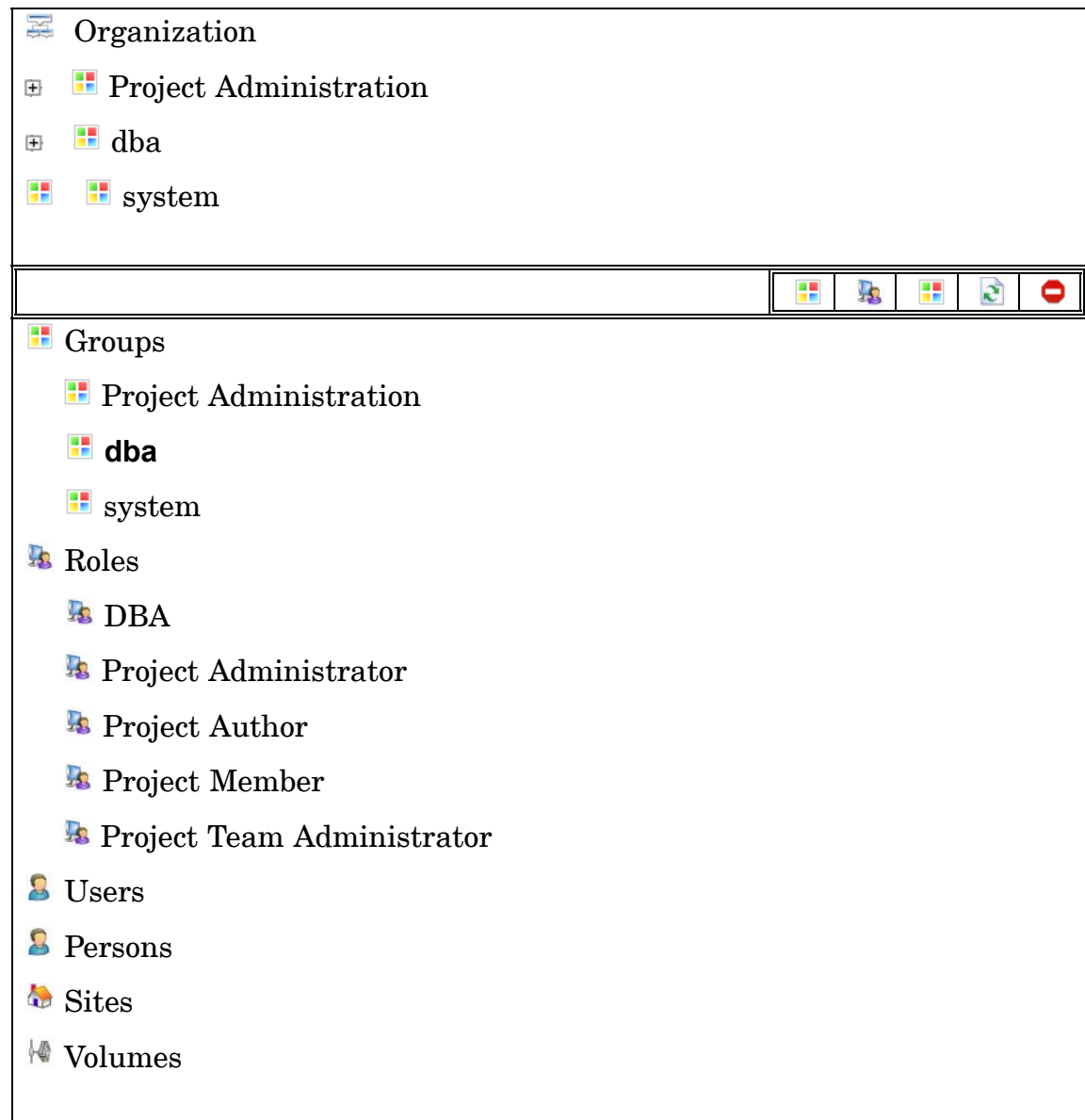
Subtopic

One line definition.

Description, List, and/or Graphic

Organization

(example graphic)



Key points

A key points section is optional.

- Use complete sentences here. Be consistent.
-

Activities (“Activity” if only one is listed)

- Activity title
- Activity title
- ...

Review questions

1. Multiple choice question?

Select all that apply.

- Incorrect answer
- Correct answer
- Correct answer
- Incorrect answer

2. True/False question?

Select one answer.

- True
- False

Style notes to writers:

- The type of question can be “Select one answer” or “Select all that apply.” A multiple choice question, for example, could be either a “Select one answer” or a “Select all that apply” type. A True/False question, for example, would be a “Select one answer” type.
- Always list True first in the answer list for True/False questions.

Note

Limit the number of True/False questions. These give the student a 50/50 chance at the right answer.

- Follow the style guide rules for lists, including initial cap and use of periods.
- Record the correct answer(s) to the questions, and a brief explanation, in the instructor notes.

Summary

The following topics were taught in this lesson:

- Topic description/importance.
-

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Reference tear-out pages

These reference tear-out pages are provided for your convenience.

Course agenda

Style note to writers: Edit the following table for the course agenda. Be sure to include a blank row between each day and between the morning and afternoon for each day.

Day 1	Morning	
	Introduction	
	Course overview	
	Lesson 1	Lesson title
	Lesson 2	Lesson title
	Lesson 3	Lesson title
	Afternoon	
	Lesson 4	Lesson title
	Lesson 5	Lesson title
Day 2	Morning	
	Lesson 6	Lesson title
	Afternoon	
	Lesson 7	Lesson title
Day 3	Morning	
	Lesson 8	Lesson title
	Afternoon	
	Lesson 9	Lesson title

Classroom data sheet

Style note to writers: Edit the following table to add or remove rows so the table includes only the data items pertinent to the course. Retain the introductory sentence preceding the table.

This table is provided so students can record their classroom setup, as described by the instructor. Optionally, instructors may hand out a preprinted data sheet.

Data item	Data value	Domain
OS user ID OS password		Local computer
Teamcenter user ID Teamcenter password		
Training folder directory		
TC_DATA		
TC_ROOT		
TC_VOLS		
TEMPLATES_DIR		
PROJECTS_DIR		
CORP_SERVER_CONFIG		
TEMPLATES		

Student profile

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STUDENT PROFILE

To stay in tune with our customers, we ask for some background information. This information will be kept confidential and will not be shared with anyone outside of Education Services.

Please print:

Your name _____ U.S. citizen ☐ Yes ☐ No

Course title/Dates _____ / _____ through _____

Hotel/motel(s) while training _____ Planned departure time after class _____

Employer _____ Location _____

Supervisor/manager _____ (Emergency) Phone _____

Your job title/responsibilities _____ / _____

Industry: ☐ Auto ☐ Aero ☐ Consumer products ☐ Machining ☐ Tooling ☐ Medical ☐ Other

Types of products/parts/data that you work with _____

Platform (operating system) _____

Reason for training _____

Please verify/add to this list of training for NX, I-deas, Imageware, Teamcenter, Tecnomatix or Dimensional Mgmt./Visualization.
Medium means Instructor-lead (IL), Online (OL), or Self-paced (SP)

Software	From whom	When	Course name	Medium

Other CAD/CAM/CAE /PDM software you have used _____

Please check (✓) your ability/knowledge level in the following areas:

<u>Subject</u>	<u>None</u>	<u>Novice</u>	<u>Intermediate</u>	<u>Advanced</u>
CAD modeling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
CAD assemblies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
CAD drafting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
CAM	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
CAE	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
PDM – usage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
PDM – system management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
PDM – customization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Thank you for your participation. We hope your training experience will be an outstanding one.

Course evaluation



PLM Software
Evaluation – Delivery

Course name: _____ Course #: _____

Course dates: _____ through _____

Please share your opinion in all of the following sections with a check in the appropriate box:

Instructor: ☒

If there were two instructors, please evaluate the 2nd instructor with X's.

Instructor: ☒

	STRONGLY DISAGREE	DISAGREE	SOMEWHAT DISAGREE	SOMEWHAT AGREE	AGREE	STRONGLY AGREE
1. ...clearly explained the course objectives.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. ...was knowledgeable about the subject.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. ...answered my questions appropriately.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. ... encouraged questions in class.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. ...was well spoken and a good communicator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. ...was well prepared to deliver the course.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. ...made good use of the training time.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. ...conducted themselves professionally.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. ...used examples relevant to the course and audience.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. ...provided enough time to complete the exercises.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. ...used review and summary to emphasize important information.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. ...did all they could to help the class meet the course objectives.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments on overall impression of instructor(s):

Overall impression of instructor(s).....Poor ☐ ☐ ☐ ☐ ☐ ☐ Excellent

Suggestions for improvement of course delivery: _____

What you liked best about the course delivery: _____

Class logistics:

1. The training facilities were comfortable, clean, and provided a good learning environment.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. The computer equipment was reliable.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. The software performed properly.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. The overhead projection unit was clear and working properly.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. The registration and confirmation process was efficient.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Hotels: (We try to leverage this information to better accommodate our customers.)

1. Name of the hotel _____ Best hotel I've stayed at.. ☐ ☐ ☐ ☐ ☐ ☐
2. Was this hotel recommended during your registration process?.....☐ YES ☐ NO
3. Problem? (brief description) _____

SEE BACK

PLM Software
Evaluation - Courseware



Course name: _____ **Course #:** _____

Course dates: _____ **through** _____

Please share your opinion for all of the following sections with a check in the appropriate box:

Material:

	STRONGLY DISAGREE	DISAGREE	SOMEWHAT DISAGREE	SOMEWHAT AGREE	AGREE	STRONGLY AGREE
1. The training material supported the course and lesson objectives.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. The training material contained all topics needed to complete the projects.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. The training material provided clear and descriptive directions.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. The training material was easy to read and understand.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. The course flowed in a logical and meaningful manner.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. How appropriate was the length of the course relative to the material?.....	<input type="checkbox"/> Too short <input type="checkbox"/> Too long <input type="checkbox"/> Just right					

Comments on course and material: _____

Overall impression of course.....Poor ☐ ☐ ☐ ☐ ☐ ☐ Excellent

Student:

1. I met the prerequisites for the class (I had the skills I needed).....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. My objectives were consistent with the course objectives.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. I will be able to use the skills I have learned on my job.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. My expectations for this course were met.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. I am confident that with practice I will become proficient.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Name (optional): _____ Location/room _____

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your training and personal development for the future.*