Teamcenter SLM – App Documentation

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1. Introduction:

Teamcenter SLM is an innovative app designed to enhance your service management capabilities within Salesforce Service Cloud.

This is a comprehensive solution that brings together the power of Salesforce Service Cloud with advanced service lifecycle management functionalities. By integrating seamlessly with the Salesforce environment, Teamcenter SLM enables you to optimize your service operations, improve customer satisfaction, and drive business growth.

2. App Overview:

Teamcenter The "Teamcenter SLM " app is a powerful and innovative solution that bridges the gap between Teamcenter's product lifecycle management (PLM) capabilities and Salesforce's Service Cloud platform. This app seamlessly integrates engineering data and servicing information from Teamcenter, providing a digital thread that connects the entire product lifecycle. By leveraging the Service Bill of Materials (SBOM) from Teamcenter, the app enables the creation of configured assets in Salesforce. These assets hold comprehensive information about the product configuration and its history, empowering customer service representatives with valuable insights to deliver top-notch support. Moreover, the app utilizes the servicing information defined in Teamcenter to generate standardized work type templates in Salesforce, streamlining service processes and ensuring consistent and efficient handling of customer cases. Beyond these capabilities, users can personalize date formats and language settings to their preferences, enhancing data presentation, analysis, and user experience. Moreover, the app introduces 3D visualization, allowing users to interact with assets in a three-dimensional format for improved understanding and analysis, thereby revolutionizing customer service operations and fostering collaboration between engineering and service teams. Ultimately, it drives enhanced customer satisfaction by delivering the right information at the right time.

3. System Requirements:

The user should have the following licenses/accesses:

- STA -- Service Technician Access License. (For viewing data from Teamcenter)
- Salesforce License Dependency on service cloud or field service.

User	Licenses
Siemens Technician	SLM for CRM (Basic)
Siemens Supervisor	SLM for CRM Asset Manager (Basic)

Version Compatibility Matrix:

This matrix indicates which versions of the Salesforce app are compatible with specific versions of Teamcenter. Please ensure that you use the corresponding SLM Microservice (SLM-MS) and Teamcenter (TC) or Active Workspace (AW) version based on the Salesforce app version you are installing.

Based on the compatibility, SLM microservices can be downloaded from the following link: <u>SLM-MS</u>



Earlier versions:

- Salesforce App Version 0.1.0.1: Compatible with Teamcenter 14.3 and Teamcenter 2312. (Microservices were not enabled for this version).
- Salesforce App Version 1.0.0.1:

App Version	SLM-MS	ТС
Teamcenter SLM 1.0.0.1	2312	2312
	6.3.0	14.3

Teamcenter SLM 2406:

• Salesforce App Version 2406 is compatible with the Teamcenter versions mentioned below. (SLM-MS 2406 and TC/AW 2406 are yet to be released).

App Version	SLM-MS	ТС
Teamcenter SLM 2406	2406	2406
	2312.001	2312
	6.3.1	14.3

4. Installation:

We are here to assist you in the installation process of our "Teamcenter SLM" app. Kindly reach out to us via the details mentioned in the support and contact information section of this document.

5. Active Workspace Gateway Configuration:

Please follow the given link to setup a gateway configuration: <u>https://docs.sw.siemens.com/en-</u> US/doc/282219420/PL20230510731367206.installingTcDc/xid488720

6. Service Lifecycle Management Connector (Version 1.0) Configuration

Provides an overview and usage guide for the Node.js application that creates a secure HTTPS server with proxy capabilities. The application includes an HTML file with embedded JavaScript logic for cross-origin communication.

- 1. Prerequisites:
- 1) Configured AW Gateway for secure mode (https) please refer Active Workspace Gateway Configuration guide.
- 2) Node.js installed on the server. (specify the node version)
- 2. Installation:
- 1) Download the application kit from [https://support.sw.siemens.com/en-US/product/282219420/download/PL20231219989177022].
- 2) Extract the contents of the kit to your desired directory.
- 3) Install dependencies: npm install or npm i command.

S C:\Windows\System32\cmd.exe
Microsoft Windows [Version 10.0.19045.3570] (c) Microsoft Corporation. All rights reserved.
C:\Users\z004Kxeu\Desktop\SLM-Connector-main (2)\SLM-Connector>npm i npm MMM read-shrinkarmp This version of npm is compatible with lockfileVersion@1, but package-lock.json was generated for lockfileVersion@3. I'll try to do my best with it! npm MMM SLM-Connector@1.0.0 No repository field.
added 84 packages from 127 contributors and audited 84 packages in 3.029s
15 packages are looking for funding run `npm fund` for details
found 0 vulnerabilities
C:\Users\z004kxeu\Desktop\SLM-Connector-main (2)\SLM-Connector>_

- 3. Configuration:
- Environment Variable:
 - The application reads environment variables from a .env file.
 - Ensure that your .env file includes the following: env NODE_TLS_REJECT_UNAUTHORIZED='0' This setting allows the application to accept self-signed certificates. //verify
- Server Configuration:
 - Specifies the port for the HTTPS server. By default, the application listens on port 4000.
 - If you wish to specify a custom port, you can include a PORT entry in your environment file. For example: env, PORT=4000. The application will then listen on the specified port if provided.



The proxy settings can be customized directly in the app.use('/awc/', ...) section.

appCo	onnecto	html 🛛 🔚 app.js	🛛 🔚 config.json 🛛 🔚 .env 🖂	🗄 config.json 🗵
1	₽(
2	E	"config" : {		
3		"AW_URL" :	"https://127.0.0.1:3000	<u>)/",</u>
4		"AWC ROUTH		
5	-	}		
6	L}			

- Active Workspace URL (config.json):

- The application reads the Active Workspace (AW) URL from the config.json file.
- The AW_URL is picked from the config.json file, which should contain the URL where AW is currently running.
- Optionally, you can specify an AWC_ROUTE in the config.json file. This is useful when deploying the application behind a reverse proxy, and you need to adjust the route accordingly.

```
Example config.json: json
{
    "config": {
    "AW_URL": "https://127.0.0.1:3000/", "AWC_ROUTE": "/awc"
    }
}
```

- Make sure to update the config.json file with the correct AW URL and, if necessary, the AWC_ROUTE.
- Note for Reverse Proxy Users: If you are deploying this application behind a reverse proxy and accessing the Active Workspace instance through it, you may need to adjust the AWC_ROUTE to match your reverse proxy setup.

4. Usage:

1) Run the start.bat script to start the server.

C:\Windows\System32\cmd.exe - start.bat

```
C:\Users\z004kxeu\Desktop\SLM-Connector-main (2)\SLM-Connector>start.bat
C:\Users\z004kxeu\Desktop\SLM-Connector-main (2)\SLM-Connector>node app.js
Server started at port 4000
```

- 2) Access the application in a web browser at https://localhost:<port>.
- 3) Installing and Removing as a Windows Service (Optional):
- Navigate to the winServiceInstaller directory.
- To install the application as a Windows service, run the install_SLM_Connector_WinService.cmd script. You can pass the Node.js path as a parameter to register the application as a Windows service. For example: install_SLM_Connector_WinService.cmd "C:\Program Files\nodejs\node.exe" Make sure to replace the example path with the actual path to your Node.js installation.
- To remove the installed Windows service, run the remove_SLM_Connector_WinService.cmd script.

Administrator: slm-connector-service:winService un-register
C:\Users\z004kxeu\Desktop\SLM-Connector-main (2)\SLM-Connector\winServiceInstaller>remove_SLM_Connector_WinService.cmd slm-connector-service: STOP: The operation completed successfully. Service "slm-connector-service" removed successfully!
C:\Users\z004kxeu\Desktop\SLM-Connector-main (2)\SLM-Connector\winServiceInstaller>_
Administrator: sim-connector-service:winService register
<pre>hepistering SLM Connector as windows service. A subdirectory or file C:\Users\z004Keu\Desktop\SLM-Connector-main (2)\SLM-Connector\log already exists. y12.22.12 Service "slm-connector-service" installed successfully! Set parameter "AppDirectory" for service "slm-connector-service". Set parameter "DisplayName" for service "slm-connector-service". Keste parameter "DisplayName" for service "slm-connector-service". Set parameter "DisplayName" for service "slm-connector-service" to its default. The filename, directory name, or volume label syntax is incorrect. Reset parameter "AppExtilmme" for service "slm-connector-service" to its default. Set parameter "AppExtilm" for service "slm-connector-service". Set parameter "AppExterPlayNetToplay" for service "slm-connector-service". Set parameter "AppExterPlayNetToplay in connector-service". Set parameter "AppExterPlayNetToplay in connector-service". Set parameter "AppExterPlayNetToplayNetToplayNetToplayNetToplayNetToplayNetToplayNetToplayNetToplayNetToplayNetToplayNetToplayNetToplayNetToplayNetToplayNetToplayNetToplayNetToplayNetT</pre>
C:\Users\z004kxeu\Desktop\SLM-Connector-main (2)\SLM-Connector\winServiceInstaller>

- Once installed, the application will run as a Windows service, allowing it to start automatically with the system.

Note: Installing and removing as a Windows service is optional and requires administrative privileges.

7. Configuration of Remote Site & Custom Settings:

Remote Site Settings:

- To change a remote site setting, follow these steps:
- From Setup, enter **Remote Site Settings** in the Quick Find box, then select Remote Site Settings.
- Click on "TeamcenterEnv" Remote Site

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	Edit Del	TeamcenterEnv	siemenssim	https://EnlervourURL.com	1	User User	04/01/2024, 4:35 pm	User User	08/01/2024, 5 11 pm
						A B C	DEFGHIJKL	MNOPQRS	T U V W X Y Z Other

- Click on Edit

Remote Site Sett	ings				
Remote Site Details					Help for this Page 🥹
Remote Site Detail		Edit Delete Clone			
Remote Site Name	TeamcenterEnv		Modified By	User User, 08/01/2024, 5:19 pm	
Namespace Prefix	siemenssim				
Remote Site URL	http://EnteryourURL.com				
Disable Protocol Security					
Description	TC Integration Env				
Active	1				
Created By	<u>User User</u> , 04/01/2024, 4:3	5 pm Edit Delete Clone			

- Remove test URL from Remote Site URL and enter your Active Workspace Domain

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Custom Settings

Once you are done with Remote Site Setting:
 From Setup, enter Custom Settings in the Quick Find box, then select Custom Settings.

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- Click on Manage, and then click on New to enter URL to get AW Embed View

SETUP Custom Settings	
Custom Setting TC_Settings	Help for this Page 🥥
If the custom setting is a list, click New to add a new set of data. For example, if your application had a setting to	r country codes, each set might include the country's name and dialing code.
If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you profile, or just a general user.	may want different values to display depending on whether a specific user is running the app, a specific
New	R
▼ Default Organization Level Value	
View: Alt Create New View	
New	
Setup Owner +	Location
No records to display.	

- Enter the Login URL details (Shared the dummy details for your reference at below)
- AWC_Path_c = 'awc'
- MS_Path_c = 'micro'
- TC_SF_Route_c = sf'
- TC_URL_c = 'http://alb-dev-vpc-036638f095ecfb256-2024554468.ap-south-1.elb.amazonaws.com'

Custom Settings	
TC_Settings Edit Provide values for the fields you created. This data is cached w	vith the application.
Edit TC_Settings	Save
TC_Settings Information	
Location <u>Siemens Demo</u> AWC_Path awc MS_Path micro TC_SF_Route sf TC_URL http://alb-dev-vpi	036638f0

- Click on Save, now you had completed the Pre-requisites for getting Embed view of AW in Salesforce.

Custom Settings			
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If the custom setting is a list, click New t	o add a new set of data. For example, if your application had a	setting for country codes, each set might inclu	ide the country's name and dialing code.
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8. User Creation & Permission Sets:

Once the user installs the package, there are some settings to be made available to get the seamless access of the app as follows:

1) Assign Siemens Technician/ Siemens Supervisor permission set on salesforce production org.

If you already have users created in the org, skip to step number 5.

1. New User Creation - From Setup, in the Quick Find box, enter Users, and then select



2. Click New User to add a single user.

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Q, user	SETUP Users			5/14-20/23-5-110-110		97 — 47.05 M - 2226 - 3.00 D - 3	
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- 3. Enter the General Information of the user. Make sure the username is unique in the form of an email address. By default, the username and email address are the same.
- 4. Specify the User License as Salesforce, and Profile as Standard User for the user.

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Roles	Alian Low		Profile	Salostorco V	1
User Management Settings	Email Ende	th millionial com	Active	-None-	
Users	Username	th m@gmail.com	Marketing User	Contract Manager Custom: Marketing Profile	
✓ Feature Settings	Nickname Usa	(170591913704112282	Offline User	Custom: Sales Profile	
V Data.com	Title		Knowledge User	Marketing User	
Prospector Users	Company		Flow User	Minimum Access - Salesforce ReadOnly	
V Service	Department		Service Cloud User	Solution Manager	
se Embaddad Canica	Division		Site.com Contributor User	Supervisor	
- Embeuded Service			Site.com Publisher User	System Administrator Technician	
and Web User			WDC User		
Verification			Data.com Monthly Addition Limit	Defend Linet (300)	
V User Interface			Accessibility Mode (Classic Only)	00	
Action Link Templates			High Contrast Palatte on Charts	ON	-

Once you are done with User Creation, we need to assign a Permission Set to grant additional access to specific users on top of their existing profile permissions.

5. If you created a user as **System Admin Profile**, then you need to assign Siemens PS User Permission Set.

If you created a user as Supervisor, then you need to assign **Siemens Supervisor Permission Set.** A user with this permission would be able to generate assets along with being able to perform other functionalities.

If you created a user as Technician, then you need to assign **Siemens Technician Permission Set.** Asset generation would be prohibited for this user but the user would be able to perform all other functions like install/uninstall of assets.

6. Assigning Permission Set to Users - From Setup, in the Quick Find box, enter Users, and then select Users.



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7. Click on Newly created user as Supervisor/Technician.



8. Click on Permission Set Assignment from top or you can scroll down to check Permission Set Assignment.

Setup Home Object N	fanager 🗸			
Q user	SETUP	99999999999999999999999999999999999999	10 - HASH - 1112 - MARTANA (ана ана ана сана сана сана сана сана са
V Users	Users			
Permission Set Groups	Uner			
Permission Sets	Nilesh M			👪 User ProfileHelp for this Page 🤢
Profiles	Permission Set Assignments (0) Quette menuoessap (v) - Oses State (v)	Permission Set Assignments: Activation Required 101 Permission Set Grou I Team 101 Managers in the Role Hierarchy 101 OAuth Agos 101 Thi User Provi	p.Assignments 10 Permission Set License Ass d-Party Account Links 10 Installed Mobile App Jonino Accounts 10	ignmenta (d) Personal Groups (d) Public Group Membership (d) a (d) Authentication Settings for External Systems (d) Login History (d=)
Public Groups				
Queues	User Detail	Edit Sharing Reset Password Free	20	
Roles	Name	Nilesh M	Role	-
	Email	am.	Profile	Standard User
User Management Settings	Username	niesh m@gmail.com	Active	1
Users	Nickname		Marketing User	ini i
✓ Feature Settings	Title	0ser1/04/725362109922047 🕙	Offline User	
2.4	Company		Knowledge User	
✓ Data.com	Department		Flow User	
Prospector Users	Division		Service Cloud User	
✓ Service	Address		Site.com Contributor User	
Parks data was his	Time Zone	(GMT+05 30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	
 Embedded Service 	Locale	English (India)	WDC User	
Messaging for In-App	Language	English	Mobile Push Registrations	View
and Web User Verification	Delegated Approver		Data.com User Type	
V User Interface	Manager		Accessibility Mode (Classic Only)	
Action Link Templater	Receive Approval Request Emails	Only if I am an approver	Debug Mode	

9. Click on Edit Assignment to get all available Permission Set.

Q user	SETUP	
✓ Users Permission Set Groups	Permission Sets	
Permission Sets	Nilesh M	Help for this Page 🥹
Profiles Public Groups	Save	
Queues Roles User Management Settings Users V Feature Settings V Data.com Prospector Users	Available Permission Sets Enabled Permission Sets Salesforce CKIS Indegration Admin Salesforce Console User Social Console User Social Console User Social Console User Service Cloud User Standservice User Stand	
 Service Embedded Service Messaging for In-App and Web User Verification User Interface Action Link Templates 	Sew Canal	

10. Select Siemens Supervisor or Siemens Technician based on created user and add it to Enable Permission Set.

Setup Home Object	Vanager 🗸	
Q user	SETUP Permission Sets	
Permission Set Groups		
Permission Sets	Permission Set Assignments Nilesh M	Help for this Page 🥹
Profiles		
Public Groups	Save Cancel	
Queues	Available Permission Sets Enabled Permission Sets	1
Roles User Management Settings Users V Feature Settings V Datacom Prospector Users	Salesforce Apex Curu Salesforce CMS Indepation Admin Salesforce Conside User Salesforce Conside User Sacutify Cender Integration User Sarchife Caud User Shopper Simmers PS User Sacutify Cender Sacutify	(#
✓ Service	Save Cancel	
Embedded Service Messaging for In-App and Web User Verification User Interface		

- 11. Click on Save.
- 12. Created user will get the Permission Set as per their Role (Supervisor/Technician).

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Q user	SETUP							
Users	Users							
Permission Set Groups					FIIOIR			-
10 M					Extension			
Permission Sets					Fax			
Profiles					Email Encoding	Unicode (UTF-8)		
Public Groups					Employee Number			
Public Groups					Used Data Space	0 B [View]		
Queues					Used File Space	0 B [View]		
Roles					Last Login			ĥ
1000				2	ast Password Change or Reset	09/01/2024, 9:26 am		-
User Management Settings					Individual	0		-
Users	Created By Lis	ser User 09/01/2024 9/2	S am		Modified By	User User 09/01/2024 9/26 am		
Feature Settings			Tres Product Down Down	al Farmed		8		
1.5			Colt Solaring Reset Passw	to Freeze				
✓ Data.com								
Prospector Users	Permission Set Assignments		Edit Assignments				Permission Set Assignments Help	3
× Service	Action Permission Set Label			Date Assigned		Expires On		
	Del Siemens Supervisor			09/01/2024				
 Embedded Service 				Sasansara				
Messaging for In-App	Permission Set Assignments: Active	ation Required	Edit Assignments			Permission Set Ass	ignments' Activation Required Help	2
and Web User Verification	No records to display							
User Interface								
200 B 200			And the second second second second					-

- 2) Enable Access to platform object like Asset, must be given by creating new permission sets. Out of the box permission sets can't provide access to platform objects in installed environment.
 - 1. Go to Permission Sets.

permis	SETU De	^p rmission Sets		
Isers		initiation acta		
Permission Set Groups	a contraction of the			
Permission sec Groups	Permiss	ion Sets		Help for this I
Permission Sets	1 crimoc			
ustom Code	On this page y	ou can create, view, and manage permission sets.		
anom code				
Custom Permissions	All V Edit C	letete Create New View		
	New Fil		ABCDEFGHI	J K L M N O P Q R S T U V W X Y Z OR
't find what you're looking for?				
using Global Search.	Action	Permission Set Label *	Description	License
and crown search.	Clone	Buyer	Allows access to the store. Lets users see products and categori	B2B Buyer Permission Set One Seat
	Cione	Buyer Manager	Includes all Buyer capabilities, and allows access to manage car	B2B Buyer Manager Permission Set One Seat
	Cione	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360 High	Cloud Integration User
	Clone	CRM Analytics Platform Admin	Create and customize CRM Analytics apps, dashboards, datasets	Analytics Platform
	Clone	CRM Analytics Platform User	View CRM Analytics apps and dashboards.	Analytics Platform
	Cione	CRM Analytics for Sales Cloud	View and manage CRM Analytics for Sales Cloud	Analytics Template Administration
	Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
	Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile a	Field Service Mobile
	Clone	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
	Clone	SCRT2 Integration User	Give SCRT2 Integration User necessary access	Cloud Integration User
	Cione	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
	Cione	Sales Engagement Basic User	Access basic sales automation and email productivity features, i	Sales Engagement Basic
	Clone	Salesforce Apex Guru	Gives Apex Guru access to analyze code for anti patterns.	Cloud Integration User
	Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate S	Cloud Integration User
		Balantana Cananta Unas	Facilia Delesfore Consela Unio	Online Constalle Lines

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2. Create New and Enter the label, click on Save.

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ermiss	ion Sets		Help for this Page
this page y	ou can create, view, and manage permissio	in sets	
I▼ Edit I C	elete Create New View		
iew E)		ABCDEFGH	IJKLMNOPQRSTUVWXYZOther
Action	Domission Set Label *	Description	License
Cione	Billion	Allows acress to the store Lets users see products and calenori	B2B Briver Dermission Set One Seat
Clone	Buyer Manager	Includes all Buyer canabilities and allows access to manage car	B2B Bilver Manager Permission Set One Seat
Clone	C360 High Scale Elow Integration Lister	Allows integration user to access features snarify to CSE0 Minh	Cloud Integration Liser
Clone	COM Applytics Diatform Admin	Allows integration user to access features specific to Coop High	Analytics Distance
Clone	CRM Analytics Platform Liser	View CDM Analytics apps and dashboards	Analytics Platform
Clone	CDM Analytics Frankford Cloud	View and manage CDM Anability for Sales Cloud	Analytics Template Administration
Clone	Commerce Admin	Allow ances to commerce admin features	Commerce Admin Dermission Set License Sest
Clone	EieldSepsireMobileStandardDermSet	Give your mobile workforce access to the Eield Service mobile a	Eield Service Mobile
Clone	Merchandiser	Allow access to commerce merchandising features	Commerce Merchandiser Licer Demission Set Licence Cost
Clone	SCPT2 Integration Liser	Give SCRT2 Integration Liker pacessor access	Cloud Integration Liker
Clone	Salas Cloud User	Depotes that the user is a Pales Cloud user	Salas Lisar
Clone	Sales Cloud User	Denotes that the user is a sales cloud user.	Sales User
Clone	Sales Engagement Basic Oser	Access basic sales automation and email productivity reatures, t	Cloud Integration Liner
Cione	Salectores CMR Integration Admin	Gives the admin data access to analyze code for any patterns.	Cloud Integration User
Clone		Gives the dutiliting ducess drig the permissions to interrate a	Gloud Integration Open
Clone Clone I of 24 I SETU Pe	Salesforce Console User 0 Selected I	Enable Salesforce Console User 64:4 Previous Next + 19	Sales Console User
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Clone Clone 4 of 24 I SETU Pe nission Set eate	satestoric Console User 0 Selected I pr rmission Sets	Enable Salesforce Console User	Sales Console User Page 1 Page 1 Help for the P
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Cione Cione 4 of 24 1 SETU Pe sission Set eate	asection console User 0 Selecter I p rmission Sets ission set information Latel AssetPermiss API Name AssetPermiss	Enable Salesforce Console User 44 4 Previous Next H IP Save Cancel ion	Sales Console User
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Cione Cione 4 of 24 I Pe Mission Set eate	astection Console User 0 Selector I p rmission Sets ission set information Label AssetPermiss Description ension Activation Required	Enable Salesforce Console User 44 4 Previous Next H IP Save Cancel ion	Sales Console User Page 1 Heip for this P I = Required inform
Clone Clone 4 of 24 I Pe Pe sission Set eate	asteolon console User O Selecter I p rmission Sets ission set information Label AssetPermiss Description ession Activation Required t t	Enable Salesforce Console User 44 4 Previous Next H IP Save Cancel ion	Sales Console User
Clone Clone setter Pe eate statesion Set eate	asestona Console User 0 Selected I p rmission Sets ission set information Label AssetPermiss API Name AssetPermiss Description exston Activation Required I I I I I I I I I I I I I I I I I I I	Enable Salesforce Console User (if 4 Previous Next + 30 (Save) Cencel ion ion ion ion	Sales Console User Page 1 Page 1 Help for the P 1 = Required Inform 1
Clone Clone A of 24 st SETUP Pe Setup Setu	satestora Console User 0 Selected II p rmission Sets ission set information Label AssetPermiss Description Description useston Activation Required ission set? Some I you plan to assign this permission set?	Enable Salesforce Console User 44 4 Previous Next H IP 500 500 500 500 500 500 500 5	Sales Console User
Clone Clone 4 of 24 ± SETU Pe electors Sinter perm Si selectors Who will us -Choose a 1	astection console User o Selecter I p p p rmission Sets ission set information Label AssetPermiss API Name AssetPermiss Description ession Activation Required type of users who will use this permission ethis permission set? Voem-if you plant to assign the service who will use this permission	Enable Salesforce Console User 44 4 Previous Next (> >> 58 ww Cancel 50 million 50 mil	Sales Console User

3. Go to System Permissions under the new Permission Set created – AssetPermission.

	Hermissions to execute visualiorce pages	
	External Data Source Access Permissions to authenticate against external data sources	
ettings that apply to Salesforce apps, such as Sales, an istom apps built on the Lightning Platform earn More	Flow Access Permissions to execute Flows	
	Named Credential Access Permissions to authenticate against named credentials	
	External Credential Principal Access Permissions to authenticate with external credential principal mappings	
	Data Category Visibility Define access to data categories	
	Custom Permissions Permissions to access custom processes and apps	
	Custom Metadata Types Permissions to access custom metadata types	
	Custom Setting Definitions Permissions to access custom settings	
	Organization-Wide Email Address Access Permissions to send email with organization-wide email address	
stem		
Settings that apply across all apps, such as record and	System Permissions Permissions to perform actions that apply across apps, such as "Modify All Data"	
iser management .earn More	Service Providers Permissions that let users switch to other websites using signle sign-on	

4. Click on Edit.

Permission Set AssetPermission	120	Video Tutorial Help for this	Page 👩
Q. Find Settings & Clone Ed	it Propertie	a Manage Assignments View Summary (Beta)	
Permission Set Overview > System Permissions	•	Edit	ľ
▼ System			
Permission Name	Enabled	Description	
MISSING LABEL_ PropertyFile - val DeleteCr/MemoAndinvoice not found in section UserPermissions		Allows a user to delete Credit Memo and Invoice records.	
Access Actionable Relationship Center for partner users		Grants access to ARC Relationship Graph, ARC Highlights Panel, and ARC Record Details Lightning components to partner users.	
Access Activities		Access tasks, events, calendar, and email.	
Access Customer Asset Lifecycle Management APIs		Use APIs to manage lifecycle-managed assets.	
Access Custom Mobile Apps		Allow user to run custom mobile apps.	
Access drag-and-drop content builder		Create and manage email templates and content in a drag-and-drop builder.	
Access Employee Experience		Access objects in the employee-experience data model.	
Access Experience Management		Access pages and dashboards available in Experience Management.	
Access Libraries		Access libraries.	
Access Lightning Web Components in Field Service		Enables Lightning web components for online and offline use in the Field Service mobile app	
moone			
Access to View-Only Licensed Templates and Apps		View apps based on View-Only License.	
Access to View-Only Licensed Templates and Apps Access Tracer for External Data Sources		View apps based on View-Only License. Access the Tracer tool for testing queries to External Data Sources.	

5. Search for Author Apex and enable it.

SETUP			
Permission Sets			
Allows users to modify Named Credentials and External Credentials	0	Allow users to modify Named Credentials and External Credentials through the Metadata, Tooling, and Connect APIs.	*
Allow users to view MLModels and related Entitles		Allow api read only access for Unified Model Tree for an Al Application, namely MLModels, MLModelFactors, MLModelMetrics, MLModelFactorComponents	
Allow user to access privacy data		Allow user to access privacy data.	
Allow user to modify Private Connections		Allow users to modify Private Connections through the Metadata, Tooling, and Connect APIs.	1
Allow user to train and generate models for Object Detection. (Retired)		Allows user to train and generate models for Object Delection.	
Allow user to use Object Detection for prediction. (Retired)		Allows a user to use Object Detection for prediction.	
Apex REST Services		Allow access to Apex REST services	
API Enabled		Access any Salesforce.com API.	
Api Only User		Access Salesforce.com only through a Salesforce.com API.	-
Assign Topics		Assign existing topics to feed items. Remove topics from feed items.	
Author Apex	V 1	Create Apex classes and triggers.	
Bulk API Hard Delete		Delete records in the Bulk API without storing them in the Recycle Bin.	
Can Approve Feed Post and Comment		Lets users control the visibility of content to other users by updating the status of a feed item or comment from pending review to published or from published to pending review.	
Change Dashboard Colors		Choose dashboard color theme and palette.	
Chatter Internal User		Use all Chatter features.	
Close Conversation Threads		Close conversation threads in profile, group, and topic feeds in Experience Cloud sites.	
Configure Custom Recommendations		Add custom recommendations in the feed, motivating users to get engaged and take action.	
Connect Organization to Environment Hub		Allows a user to connect this organization to an Environment Hub.	
Connect Org to Customer 360 Data Manager		Allows a user to connect the org to Customer 360 Data Manager.	
Connect Org to Data Cloud		Allows a user to connect the org to Data Cloud.	
Create Al Insight Objects		Create objects associated with AI record insights, including the insight, value, reason, and feedback.	
Create and Customize Dashboards	0	Create, edit, and delete dashboards in personal folders.	-

6. Along with this, search for Customize Application, enable it and click on Save.

SETUP		
Permission Sets		
	111.75	
Create and Customize Dashboards		Create, edit, and delete dashboards in personal folders.
Create and Customize List Views		Create list views; modify and delete own list views.
Create and Customize Reports		Create, edit, and delete reports in personal folders.
Create and Edit CRM Analytics Dashboards		Create and Edit CRM Analytics Dashboards.
Create and Set Up Experiences		Create Experience Cloud sites, manage settings, membership, login and registration, branding, and associated Site.com site.
Create and Update Second-Generation Packages		Create and update these packages using the command-line interface.
Create B2B Marketing Analytics Apps		View and create B2B Marketing Analytics apps.
Create CMS Workspaces and Channels		Create Workspaces and Channels in Salesforce CMS.
Create Content Deliveries		Create content delivery links to share files that aren't managed by a library. To let a user create content deliveries for files in a library, enable Deliveries for files in a library.
Create CRM Analytics Apps	- i	Create CRM Analytics Apps.
Create Dashboard Folders		Create dashboard folders and manage these folders if sharing rights allow.
Create Folders for Lightning Email Templates		Create Folders for Lightning Email Templates
Create Libraries		Create libraries.
Create Public Links		Let users create links to share files externally. Unlike content deliveries, public links can't be password protected. To let a user create links to file
Create Report Folders		Create report folders and manage these folders if sharing rights allow.
Create Topics		Create new topics by assigning them to feed items.
Custom Applications for Field Service Mobile		Enable Custom Applications in the Field Service mobile app.
Customize Application	1	Customize the organization using App Setup menu options.
Data Cloud FlexCards for Financial Services Cloud		Data Cloud FlexCards for Financial Services Cloud.
Delete Credit Memo and Invoice		Allows a user to delete Credit Memo and Invoice records.
Delete Second-Generation Packages		Delete packages and package versions.

7. Go to Object Setting and Search Asset

SETUP Permission Sets			
Permission Set AssetPermission			Video Tutorial Help for this Page 🥹 🧍
Q. Find Settings I Clone Delete Ed	It Properties Manage Assignments View Summary (Beta)		
Permission Set Overview			
Description	API Name	AssetPermission	
License	Namespace Prefix	siemensslm	
Session Activation Required	Created By	User User, 17/01/2024, 3:06 pm	
Permission Set Groups Added To 0	Last Modified By	User User, 17/01/2024, 3:06 pm	
Apps	Assigned Apps Settings that specify which apps are visible in the app menu		
	Assigned Connected Apps Settings that specify which connected apps are visible in the app menu		
	Object Settings Permissions to access objects and fields, and settings such as tab availability		
	App.Permissions Permissions to perform app-specific actions, such as "Manage Call Centers"		
	Apex Class Access Permissions to execute Apex classes		
	Visualforce Page Access Permissions to execute Visualforce pages		
	External Data Source Access Permissions to authenticate against external data sources		*

8. Click on Asset and Click on Edit.

Bormission Sata					
Permission Sets					
Appointment Bundle Configs	ApptBundleConfig	No Access	12	<u> </u>	
Appointment Bundle Policies	ApptBundlePolicy	No Access	15		
Appointment Bundle Policy Service Territories	ApptBundlePolicySvcTerr	No Access	5		
Appointment Bundle Propagation Policies	ApptBundlePropagatePolicy	No Access	13		
oppointment Bundle Restriction Policies	ApptBundleRestrictPolicy	No Access	9		
Appointment Bundle Sort Policies	ApptBundleSortPolicy	No Access	8		
sppointment Topic Time Slots	AppointmentTopicTimeSlot	No Access	6	140	1
usset Actions	AssetAction	No Access	30	-	
Asset Action Sources	AssetActionSource	No Access	18		
sset Downtime Periods	AssetDowntimePeriod	14	11	1447	
sset Installation Records	siemenssimAsset_Installation_Recordc	No Access	11	+	
asset Relationships	AssetRelationship	(J=	10	1993	
isset Revisions	siemenssimAsset_Revisionc	No Access	11	(44.1)	
sset Revision Slot Junctions	siemenssim_Asset_Revision_Slot_Junction_c	No Access	8	20	
issets	Asset	No Access	67	1993	
Assets	01r1m000000N5L8	-	-	-	
sset Slots	slemenssim_Asset_Slot_c	No Access	10	12247	
sset State Periods	AssetStatePeriod	No Access	11	27/1	
Asset Warranties	AssetWarranty	-	19	1943	
ssigned Resources	AssignedResource	0.22	10	420	
Associated Locations	AssociatedLocation	100	10	351	
sync Operation Logs	AsyncOperationLog	No Access	(144)	(44)	
Attribute Definitions	AttributeDefinition	No Access	17	223	
Attribute Picklists	AttributePicklist	No Access	10	32.0	
Attribute Picklist Values	AttributePicklistValue	No Access	13	(44)	
Authoritation Form Concents	5) the circline Concept	No. Annon			_

9. Enable Tab Settings and CREV (Create, Read, Edit, View All) operation permissions.

SETUP Permiss	sion Sets				
Permission Set AssetPermiss	ion		Sec. 18 - 27		Video Tutorial Help for this Page 🥹 🦷
Q, Find Settings	S Clone	Delete Edit Pr	operties Manage	Assignments View Summa	(Beta)
Permission Set Overview	Object Settings	Assets 👻	Save Canc	a]	
Tab Settings					
Available		Visible			
		7			
Object Permissions					
Permission Name		Enabled	1		
Read					
Create					
Edit					
Delete					
View All					
Modify All					
Field Permissions					
Field Name	Field API Name		Read Access	Edit Access	
Account	AccountId		0		

10. Tick Read and Edit Access for Manufacture Date.

SETUP			
Permissi	ion Sets		
1	A CLARKER		
Is Lot	siemenssim_ls_Lotc	U	U
Is Rotable	siemenssim_ts_Rotable_c	0	0
Is senalized	siemenssim_ls_senalized_c	0	
Is Teamcenter Asset	siemenssim_ls_Teamcenter_Asset_o		
Is Traceable	siemenssim_ls_Traceable_c		
Last Modified By	LastModifiedById	12	
Lifecycle End Date	LifecycleEndDate		
Lifecycle-managed asset	HasLifecycleManagement		
Lifecycle Start Date	LifecycleStartDate		
Life Limited	siemenssim_Life_Limitedc		
Location	LocationId		
Manufacture Date	ManufactureDate.		
Manufacturers ID	siemenssim_Manufacturers_Idc		
Parent Asset	Parentid	53	51
Part Number	siemenssim_Part_Numberc		
PartUsed	siemenssIm_PartUsed_c		
Preserve Quantity	siemenssim_Preserve_Quantityc	0	
Price	Price		
Product	Product2ld		
Product Code	ProductCode		
Product Description	ProductDescription	0	
Product Family	ProductFamily	0	
Product SKU	StockKeepingUnit	0	
Purchase Date	PurchaseDate		0
Ougotitu	Quantity	0	0

- 11. Click on Save.
- 12. Go to Object Settings again and search for Teamcenter Assets.

Object	Manager

 \sim

SETUP				
Permission Sets				
				\approx
Social Posts	SocialPost	No Access	59	
Solutions	Solution	No Access	8	
SOS Sessions	SOSSession	No Access	20	
Streaming Channels	StreamingChannel	No Access		
Subscriptions	ContentSubscriptions			
Tasks	Task		24	
Teamcenter Assets	01rGB0000013pfd			
Thanks	WorkThanks		6	
User External Credentials	UserExternalCredential	No Access		
User Provisioning Requests	UserProvisioningRequest		14	
Users	User			
Vehicle User Assignments	VehicleUserAssignment	No Access	8	
Visited Parties	VisitedParty	No Access	8	
Visitors	Visitor	No Access	5	
Visits	Visit	No Access	23	



-		Q Search Setup
Setup Home Object	Manager 🗸	
Salesforce Mobile App Lightning Usage Optimizer Manage Subscription Sales Cloud Everywhere ADMINISTRATION	Permission Set SLM Asset Permission Find Settings	Clone) Edit Properties Manage Assignments View Summary
Permission Set Groups	Teamcenter Assets	Edit
Permission Sets	Tab Settings	
Profiles	Available	Visible
Public Groups		
Queues		
Roles		
User Management Settings		
Users		

14. Go to Users and select User for which you want to assign permission set.

	Users					
rs						
Permission Set Groups Permission Sets	All	75				Help for this
Profiles	On this page you can create, view, a	ind manage user	5.			
Public Groups	To get more licenses, use the Your A	ccount app Let's	L <u>Go</u>			
Qualies	View: All V Create New View					
queues	-			A B C D E F G H	I J K I	M N O P Q R S T U V W X Y Z O
Koles			New User Reset Password(s) Add Multiple Use	#8		
User Management Settings	C Action Full Name *	Alias	Username	Role	Active	Profile
Users	Edt m.Nd	mlin	nifesh.m@gmail.com.test		1	Standard User
ure Settings	Edit User_Integration	integ	integration/@00d1m0000002xa3eam.com		1	Analytics Cloud Integration User
Data com	Eat User Security	sec	insightssecurity.@00d1m0000002xa3eam.com		1	Analytics Cloud Security User
Data.com	Edt User_User	UUser	test-n2j8amahtiv6@example.com		1	System Administrator
Prospector Users			New User Reset Password(s) Add Multiple User	s		
find what you're looking for? ng Global Search.				A B C D E F G H	I J K I	. M N O P Q R S T U V W X Y Z C

15. Click on Edit and go to Permission Set Assignment.

m		Help for this Page
	Save	
Available Permission Sets AssetPermission Buyer Buyer Manager C360 High Scale Flow Integration User CRM Analytics Platform Joser CRM Analytics Platform User CRM Analytics For Sales Cloud Commerce Admin FieldServiceMobileStandardPermSet Merchandiser	Add Remove	
	Save	

16. Select AssetPermission and Add it into Enabled Permission Set.

	Save Cancel	
Available Permission Sets	Enabled Permission Sets	
uger Manager 380 High Scale Flow Integration User RM Analytics Platform Admin RM Analytics Platform User RM Analytics for Sales Cloud commerce Admin ield/ServiceMobileStandardPermSet lerchandser ales Cloud User	Add Remove	
	Save) Cancel	

17. Click on Save, you will be able to see the permission set assigned to the User.

				-
		Employee N	mber	
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9. Application Workflow & Usage:

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1) Home Tab: User logs into the Salesforce App. The Home tab displays an embedded Active Workspace using an iframe.

2) Active Workspace Interaction: User interacts with Active Workspace features within the iframe. Active Workspace makes HTTP requests to Teamcenter microservices to fetch engineering data and servicing information.

3) First Authentication (Active Workspace): If not already authenticated, the user is prompted to log into Active Workspace. Active Workspace validates user credentials against Teamcenter using HTTP requests.

4) Asset Generation: The user navigates to the "Folders" tile and either selects an existing part or creates a new one within Active Workspace. Click on the "Generate Assets" button to initiate the connection between Teamcenter and Salesforce.



Version: 2406

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5) Data Retrieval (Active Workspace to Salesforce): Upon successful authentication, Active Workspace retrieves relevant data from Teamcenter. Active Workspace communicates with Salesforce using HTTP requests to send the fetched data.

6) Authenticating SF with TC: If not already authenticated, the user is prompted to login to establish a connection between Salesforce and Teamcenter.

7) Asset Creation in Salesforce: Upon successful authentication, Salesforce receives the data from Active Workspace. Salesforce processes the received data and creates assets in the Salesforce environment.

8) Asset Display: Once the asset is created, it is displayed in a new tab as shown below.

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9) Workflow Integration: The assets in Salesforce are now integrated into the service workflow, streamlining service processes.

10) Consistent User Experience: Siemens Teamcenter Active Workspace is embedded in Salesforce, allowing the user to experience a seamless transition between Active Workspace and Salesforce.

11) Functionalities:

1. Part Replacement – Users can seamlessly install, uninstall the parts on the given locations and time.

2. Generate assets – Users can generate configured assets.

3. Track asset history – Users can track the location, manufacturing dates, installation, and uninstallation dates of the assets seamlessly.

- 4. Part logistics Users can assign different part logistics information like serialised assets.
- **5. Date Configuration:** Users can personalize date formats and preferences for enhanced data presentation and analysis.
- **6. Localization:** Users can tailor language settings to their preferences for a personalized user experience.

Following steps would enable seamless localization of the Salesforce app:

1) On your Home page, click on the Profile option > Settings.

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2) Select Language & Time Zone under My Personal Information and change the language as required and click on Save. (*Rest information can be the same*).

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3) Once it is saved, the language is changed throughout the app and assets can be viewed in your local language. Example is attached below.

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7. 3D Visualization – Users can visualize assets in a three-dimensional format for enhanced understanding and analysis.

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3D Visualization

The 3D visualization feature within the application allows users to interact with assets in a three-dimensional environment, providing a more immersive and detailed view. Here's how it works:

- Asset Selection: Users can select an asset from the asset list within the application. (If the topline is selected, the whole asset can be viewed whereas, if a single part line of the asset is selected only that could be viewed).
- Launch 3D Viewer: Upon selecting an asset, users have the option to launch the 3D viewer tool and visibility buttons would be enabled.
- **Navigation:** Within the 3D viewer, users can navigate and manipulate the asset using standard controls such as zoom, rotate, and pan.
- **Detailed Inspection:** Users can inspect the asset from various angles and perspectives, allowing for detailed analysis and examination.
- Enhanced Analysis: Users can leverage the 3D visualization for enhanced analysis, simulation, and decision-making processes, improving overall asset management efficiency.

10. Change Log

Version 0.1.0.1:

- **Tree hierarchy of an asset**: Implemented a basic tree structure for asset representation, allowing users to view asset hierarchy.
- **Generate asset:** Introduced the ability to generate assets directly from the Salesforce app, streamlining asset creation processes.
- **Part movement:** Added functionality for tracking part movement, enabling users to monitor the movement of parts across different locations.

New Release (Version 2406):

- **Date configuration:** Implemented customizable date configurations, providing users with flexibility in setting date formats and preferences.
- **Localization:** Introduced localization support, allowing users to customize language settings based on their preferences.
- **3D:** Implemented 3D visualization support, enabling users to view assets and related data in a three-dimensional format.

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