

Teamcenter SLM 2412 – 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

- A. The user should have the following licenses/accesses:
- a. STA -- Service Technician Access License. (For viewing data from Teamcenter)
 - b. 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)

- B. Version Compatibility Matrix:

App Version	SLM-Microservice	Teamcenter
Teamcenter SLM 2412	2412 or latest patch	2412
	2406.0001 or latest patch	2406
	2312.0003 or latest patch	2312

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: [SLM-MS](#)

- C. MFE Vis microservice: Installation of MFE Vis microservice is a prerequisite for asset visualization in SLM Salesforce app. (MFE Vis microservice is part of Teamcenter AW kit)
- D. Active Workspace should be https enabled.

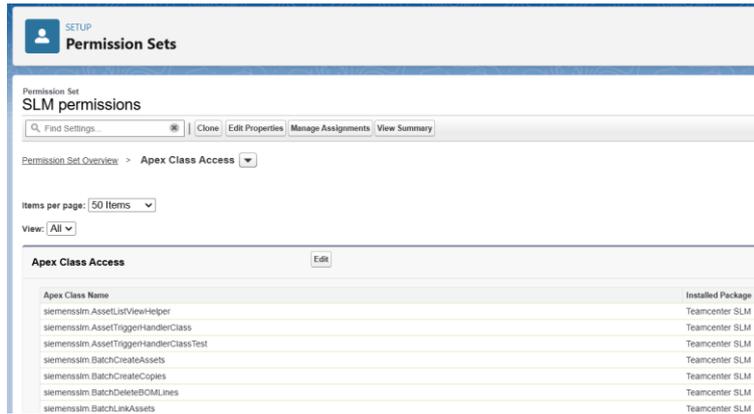
4. Active Workspace Gateway Configuration

1. Please follow [this link](#) to setup a gateway configuration if not already done.
2. Add below in "additionalCookieAttributes" in microservice gateway config.json

```
"additionalCookieAttributes": [
  {
    "cookieName": "XSRF-TOKEN",
    "attributes": [ "Secure", "SameSite=None" ]
  },
  {
    "cookieName": "_csrf",
    "attributes": [ "Secure", "SameSite=None" ]
  },
  {
    "cookieName": "JSESSIONID",
    "attributes": [ "Secure", "SameSite=None", "Max-age=9999999999", "Expires=Session" ]
  },
  {
    "cookieName": "TcSS-JSESSIONID",
    "attributes": [ "Secure", "SameSite=None" ]
  }
]
```

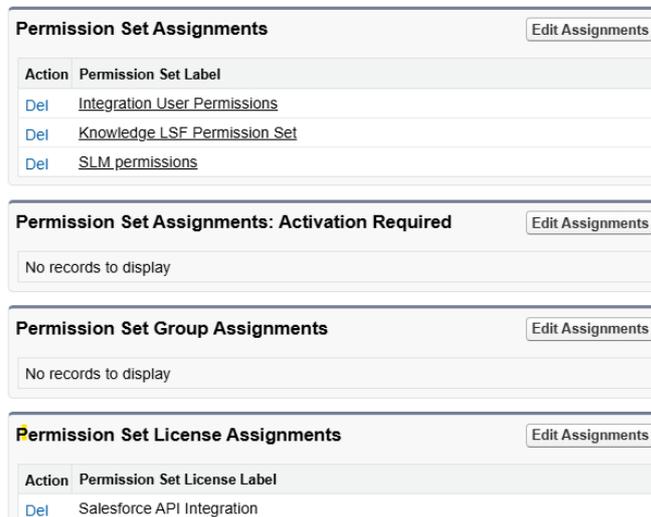
5. App installation & configuration

- A. Enable knowledge in Salesforce org in which you want to install the application (Setup -> Knowledge Settings)
- B. Install the app: The app can be installed from [Salesforce AppExchange](#). In case of difficulty, we are here to assist you. Kindly reach out to us via the details mentioned in the support and contact information section of this document.
- C. Create permission set: Create new permission set say "SLM Permissions":
 - a. Assign full access to below objects under "Object Settings":
 - i. Knowledge Asset Junctions
 - ii. Assets
 - b. Assign below "System Permissions":
 - i. Author Apex
 - ii. Customize Application
 - c. Assign all siemensslm namespace apex classes under "Apex Class Access".

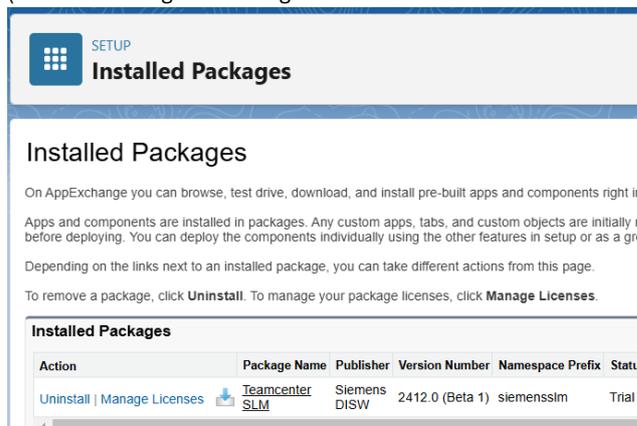


D. Users' creation:

- a. Create integration user: To communicate with Teamcenter in the background, create a user with user license "Salesforce Integration" and Profile "Minimum Access – API Only Integrations". Once created:
 - i. Assign "Salesforce API Integration" Permission Set License to this user.
 - ii. Assign these permission sets: "Integration Users Permissions" and "SLM Permissions"



- iii. Assign SLM app License to Integration User in "Installed Packages":
(Installed Packages -> Manage Licenses -> Add Users -> Select this user & click "Add")

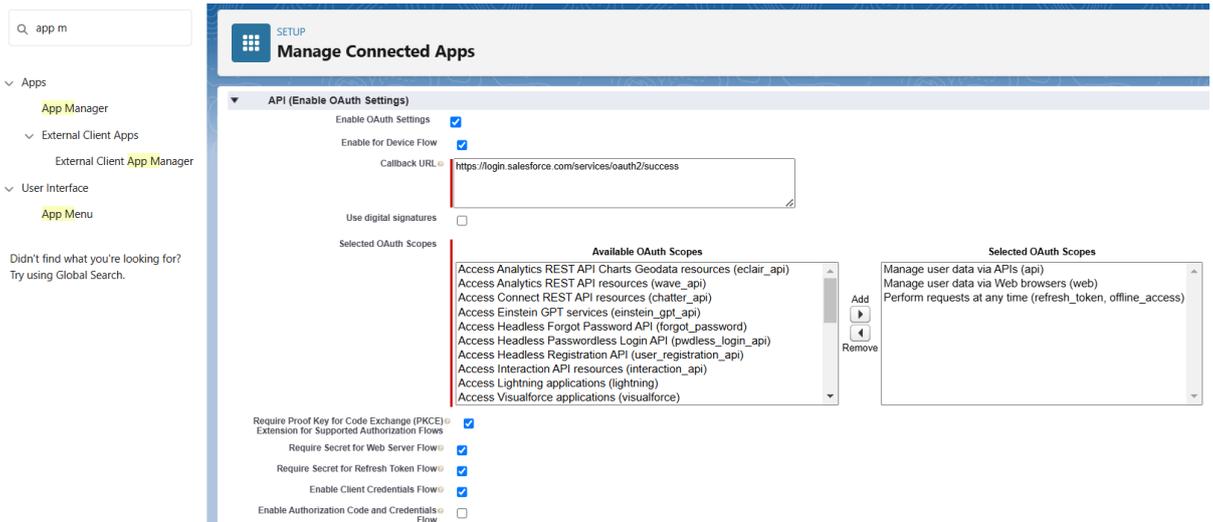


- b. Create/update actual user: Now it's time to create actual user or modify existing user who is going to use the app.
 - i. Technician user: Create new user (it must be a knowledge user) and assign "Siemens Technician" and "SLM permissions" permission sets. You can also do this for existing user.

- ii. Supervisor user: Create new user (it must be a knowledge user) and assign “Siemens Supervisor” and “SLM permissions” permission sets. You can also do this for existing user.

E. Create connected app: Create a connected app in Salesforce say “SLM Connected App” with below settings

- a. Enable OAuth Settings
- b. Enable Device Flow
- c. Enable Client Credentials Flow
- d. Select OAuth scopes:
 - i. Manage user data via APIs (api)
 - ii. Manage user data via Web browsers (web)
 - iii. Perform requests at any time (refresh_token, offline_access)



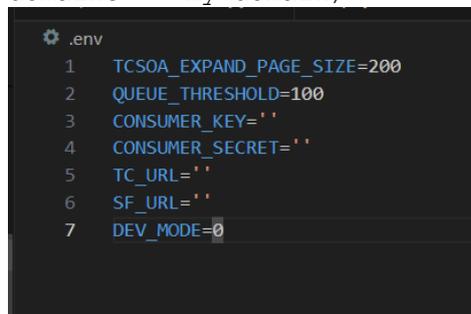
- iv. Save

- e. Manage -> Policies -> IP relaxation -> Relax IP Restrictions
- f. Client Credentials Flow -> Run As -> Select integration user
- g. Save
- h. Get Consumer Key and Consumer secret (Open connected app -> Manage consumer details). Save Consumer Key and Consumer Secret in microservices .env file:

```

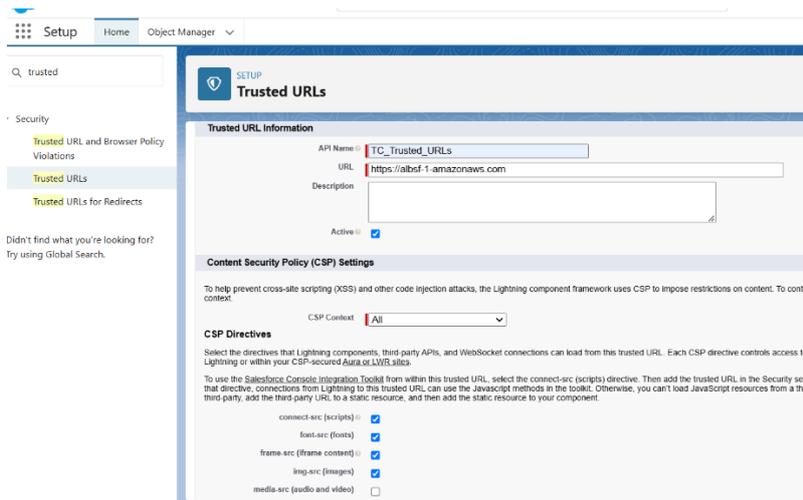
CONSUMER_KEY=<key>
CONSUMER_SECRET=<secret>
DEV_MODE=0
SF_URL=<my domain> (In Salesforce go to setup -> search for domains -> my domain)

```



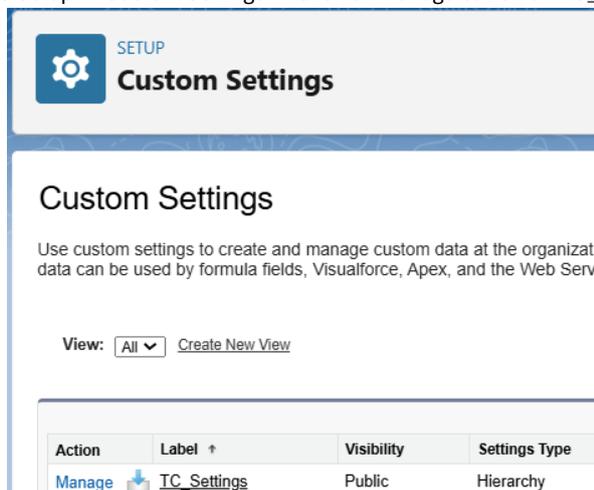
F. Add trusted URLs: Create two trusted URLs (for http and https) with below configurations enabled:

- a. connect-src (scripts)
- b. font-src (fonts)
- c. frame-src (iframe content)

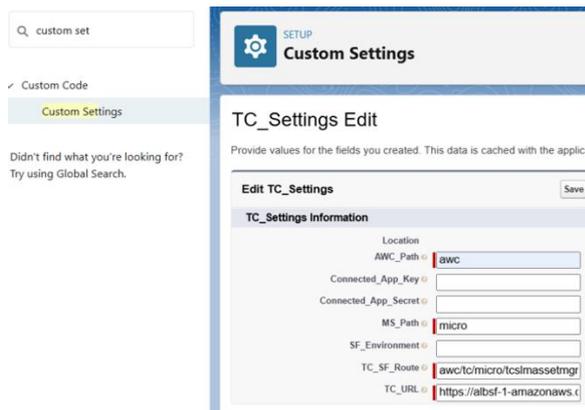


G. Custom Settings:

- a. Go to Setup -> Custom Settings -> Click on Manage button of "TC_Settings" row -> Click on "New":

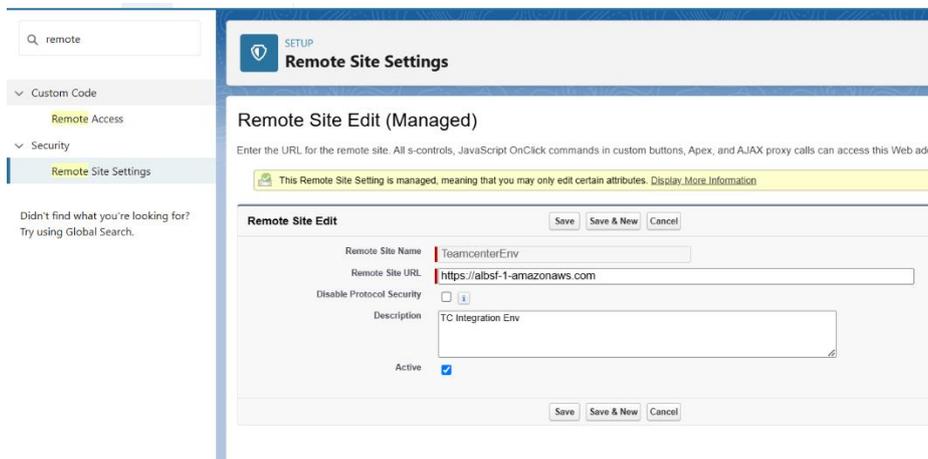


- b. Enter the Login URL details (Shared the dummy details below for your reference)
 - i. AWC_Path__c = 'awc'
 - ii. MS_Path__c = 'micro' (Microservice path i.e.: "micro" or "sd" will be as per AW gateway config.json)
 - iii. TC_SF_Route__c = 'tc/micro/tcslmassetmgmt/coc' (Microservice path i.e.: "micro" or "sd" will be as per AW gateway config.json)
 - iv. For TcX: TC_SF_Route__c = 'tc/micro/tcslmassetmgmt/tcxcoc' (Microservice path i.e.: "micro" or "sd" will be as per AW gateway config.json)
 - v. TC_URL__c = <Active Workspace gateway URL> (Ex: https://albsf-tc2312.eu-central-1.elb.amazonaws.com)



H. Remote Site Settings:

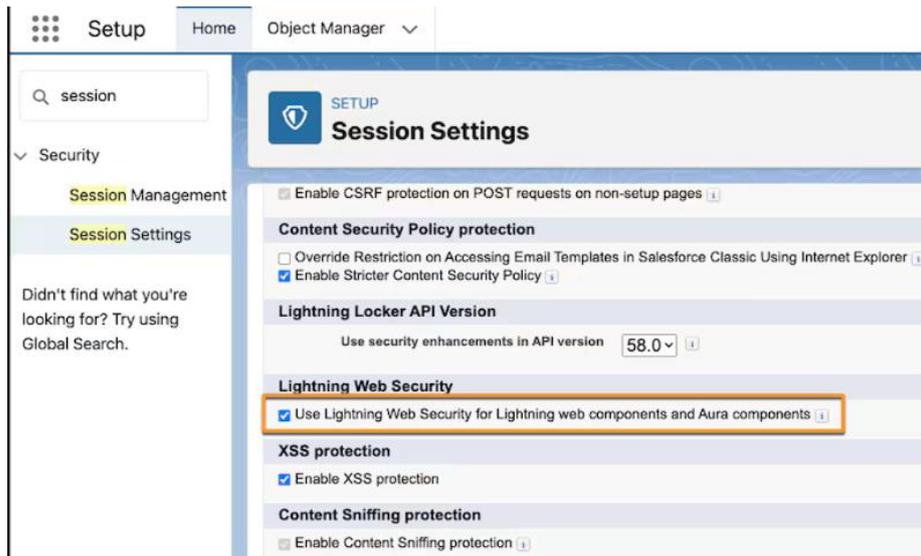
- a. Go to Setup -> Remote Site Settings -> Click on "TeamcenterEnv" row
- b. Remove test URL from Remote Site URL and enter your Active Workspace Domain Name URL and click on Save.



I. Knowledge setup for all the users:

- a. Users ---> Make it knowledge user.
- b. Open service setup --> Look for "Knowledge Setup" and click on it and follow the instructions.
- c. Go to Object Manager (within service setup only) --> Open Knowledge (siemensslm__Knowledge__kav)
- d. Go to Fields & Relationships --> Open Answer field --> Click on "Set Field-Level Security"
- e. Check "Visible" column for All & save
- f. Go to Page Layouts --> Open Knowledge Layout --> Drag & drop "Answer" field below "URL Name" & then Save

J. Enable lightning web security: Open Setup -> Session Settings -> check the checkbox for lightning web security:



6. Support & Contact

Contact 1:

Name: Bhupendrasing Patil

Email: bhupendrasing.patil@siemens.com

Contact 2:

Name: Ajay Dahibhate

Email: ajay.dahibhate@siemens.com

7. Legal & License Information

License Name: Siemens Industry Software, Inc_ISVForce_USD

License Type: ISVforce