



# Teamcenter Records Management

PLM World  
May 2006

Drew Donovan  
Teamcenter Product Management



# Teamcenter Records Management



## Features/Capability

- ▶ Logically organize records in folders
- ▶ Classify information from valid values
- ▶ Define and reuse file plans to control record retention and disposition
  - ▶ Automation, active notification
- ▶ Manage email as records (via Microsoft Outlook integration)
- ▶ Support DoD 5015.2 standard



## Value

- ▶ Compliance
  - ▶ Conform to legal or regulatory requirements
  - ▶ Eliminate penalties
- ▶ Increase Productivity
  - ▶ Easier and quicker to find information
  - ▶ Don't waste time/use outdated material
- ▶ Improve Quality
  - ▶ Minimize errors in classifying information
- ▶ Reduce cost – storage and tracking of unnecessary record





# Teamcenter Records Management



## PLM Business Logic

MRO

Business BOM

Systems

Factory

Part / Process / Resource  
Lifecycle Representation

Context

Design

Simulation

Validation

Configuration

Supply Chain

Change

Classification

Compliance

Programs

Requirements

Collaboration

Process / Lifecycle

Parts & Documents



# Income Tax Filing



investment statements  
(interest, dividends,  
1099G, K-1 ...)

medical  
expenses



donations, gifts to charity



tax information  
(current year)

W2, Instructions,  
Forms, Worksheets



mortgage statements  
(interest, real estate taxes)





# Income Tax Filing



Tax Information  
(current year)

W2, interest,  
dividends,  
1099G, K-1 ...

2004  
Income

2004  
Deductions

Charity/donations,  
mortgage interest,  
real estate taxes,  
medical expenses ...

2004  
Federal

Instructions,  
Forms,  
Worksheets

2004  
State

Instructions,  
Forms,  
Worksheets

2004  
Local

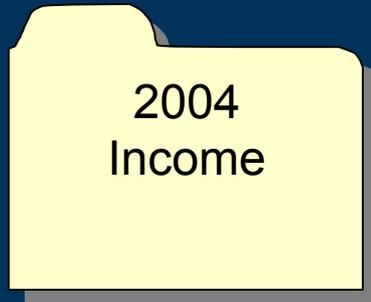
Instructions,  
Forms,  
Worksheets



# Income Tax Filing



W2, interest,  
dividends,  
1099G, K-1 ...



Charity/donations,  
mortgage interest,  
real estate taxes,  
medical expenses ...



Instructions,  
Forms,  
Worksheets



Instructions,  
Forms,  
Worksheets

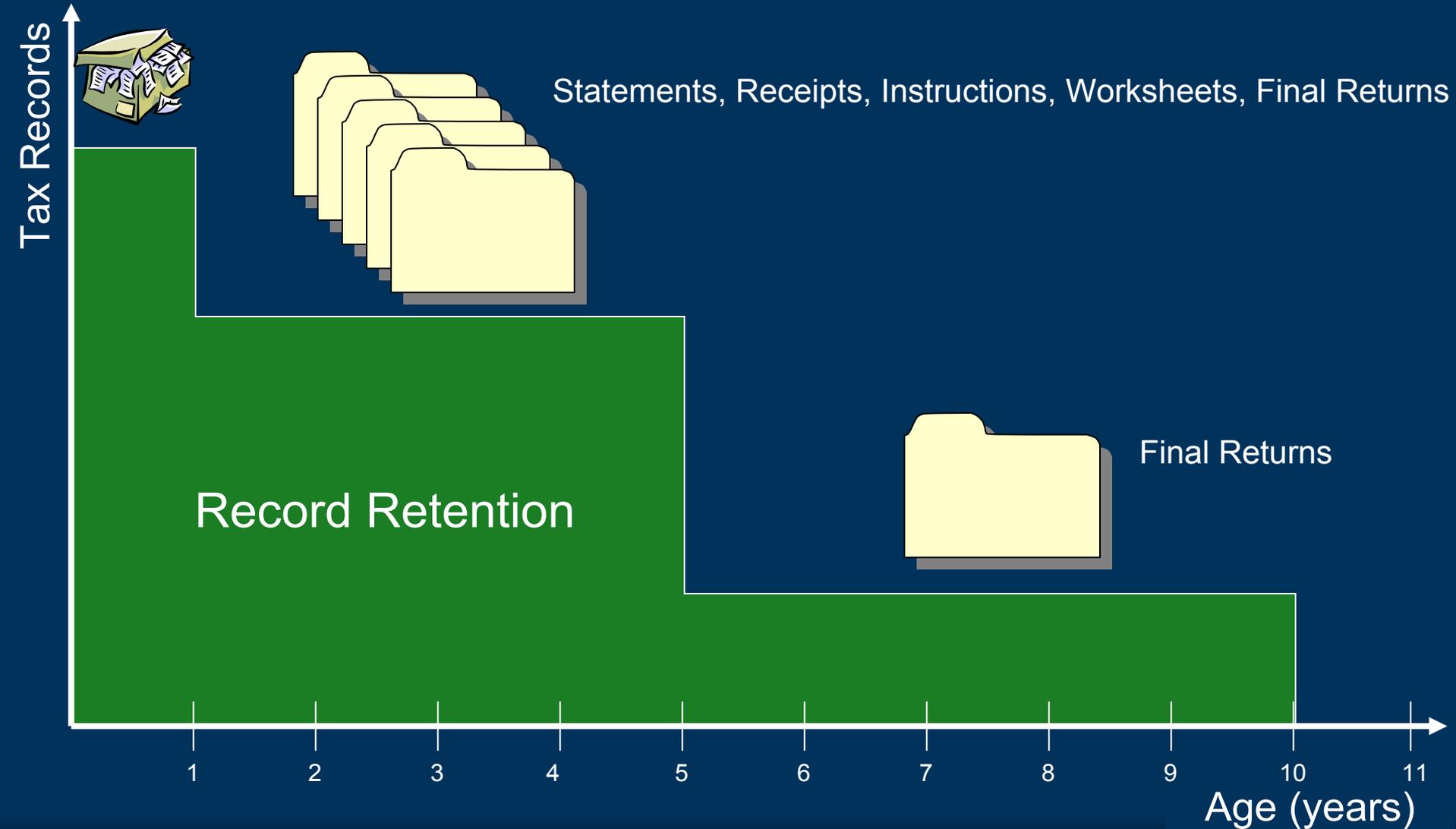


Instructions,  
Forms,  
Worksheets





# Tax Information Retention





# Records Management Perspective

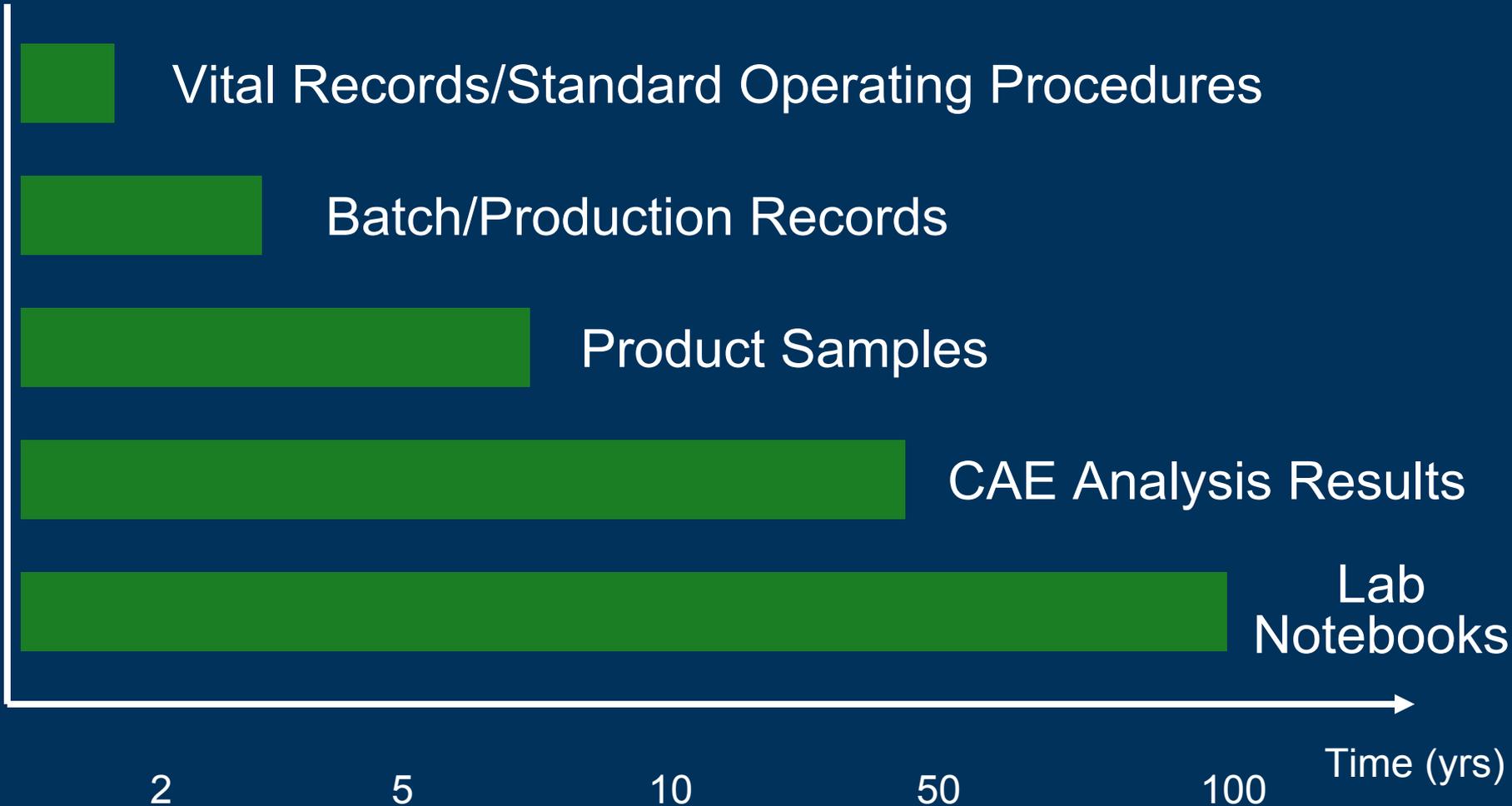


- ▶ Records – data/content to be managed (tax information)
  - ▶ Record Format (Form 1040)
  - ▶ Record Media (paper, electronic)
- ▶ Record Folders – organizers for records
- ▶ Folder Cutoff – collect and process annually
- ▶ Disposition Schedule/phases
  - ▶ collect annually
  - ▶ file by April 15<sup>th</sup>
  - ▶ retain returns & supporting information for 4 yrs
  - ▶ retain returns for 10 years (or indefinitely)





# Record Retention Examples





## 3 Scenarios

- ▶ Physical Notebook
  - ▶ How Teamcenter can improve management of physical records
  - ▶ Highlight records management structure/items (static)
- ▶ Electronic Notebook
  - ▶ How Teamcenter can manage electronic records
  - ▶ Highlight records management processing (dynamic)
- ▶ DoD Example
  - ▶ DoD 5015.2 certification status
  - ▶ Highlight additional records management capabilities and special features to support the DoD 5015.2 standard



# Records Management Structure

Physical Notebook Example



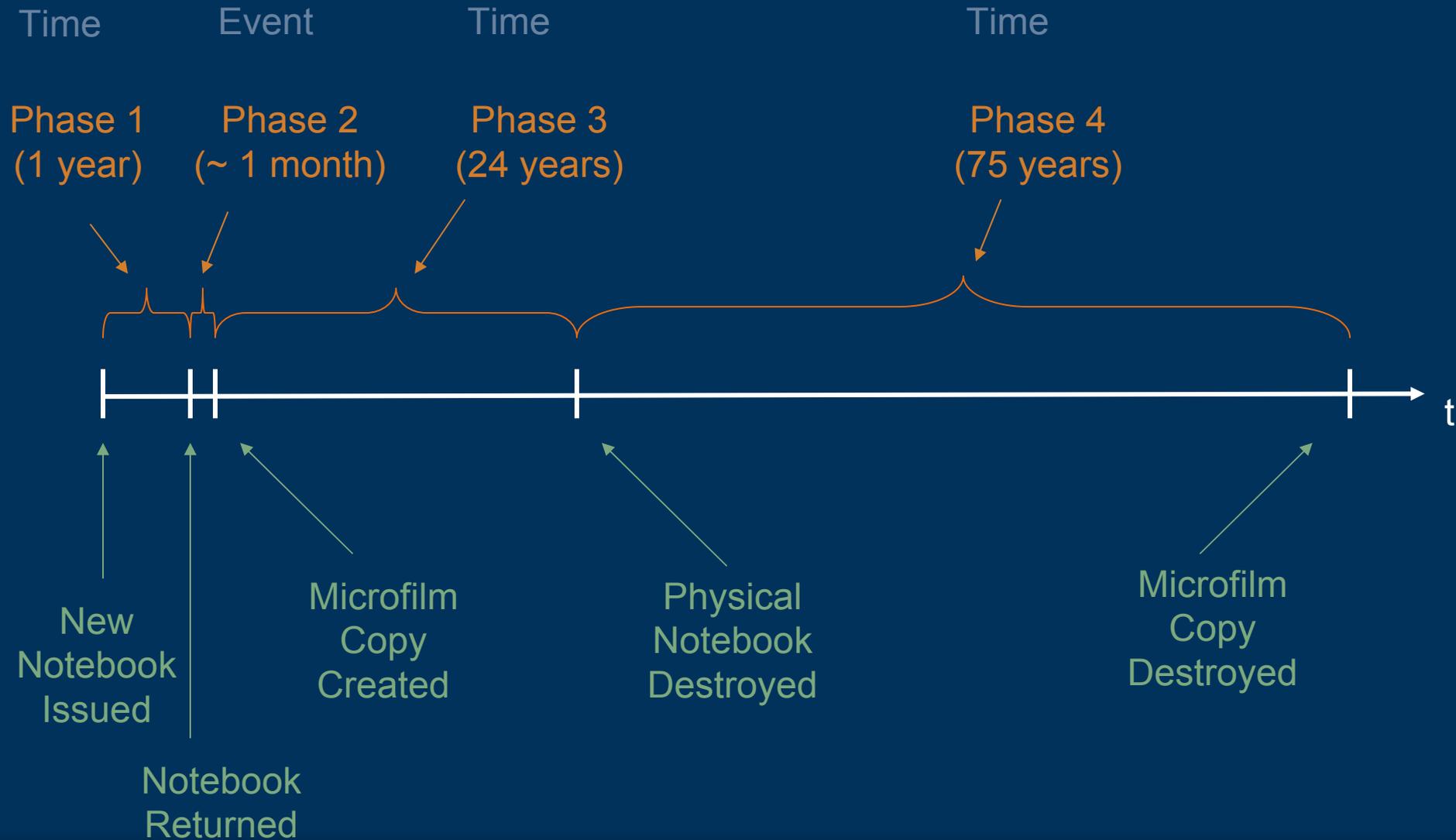
# Physical Notebook Scenario Overview



- ▶ Central Records organization issues new notebook to researcher
- ▶ After 1 year of usage, researcher returns notebook to Central Records organization
- ▶ Central Records creates microfilm copy of notebook
- ▶ Central Records disposes of physical notebook after 25 years
- ▶ Central Records disposes of microfilm copy after 100 years

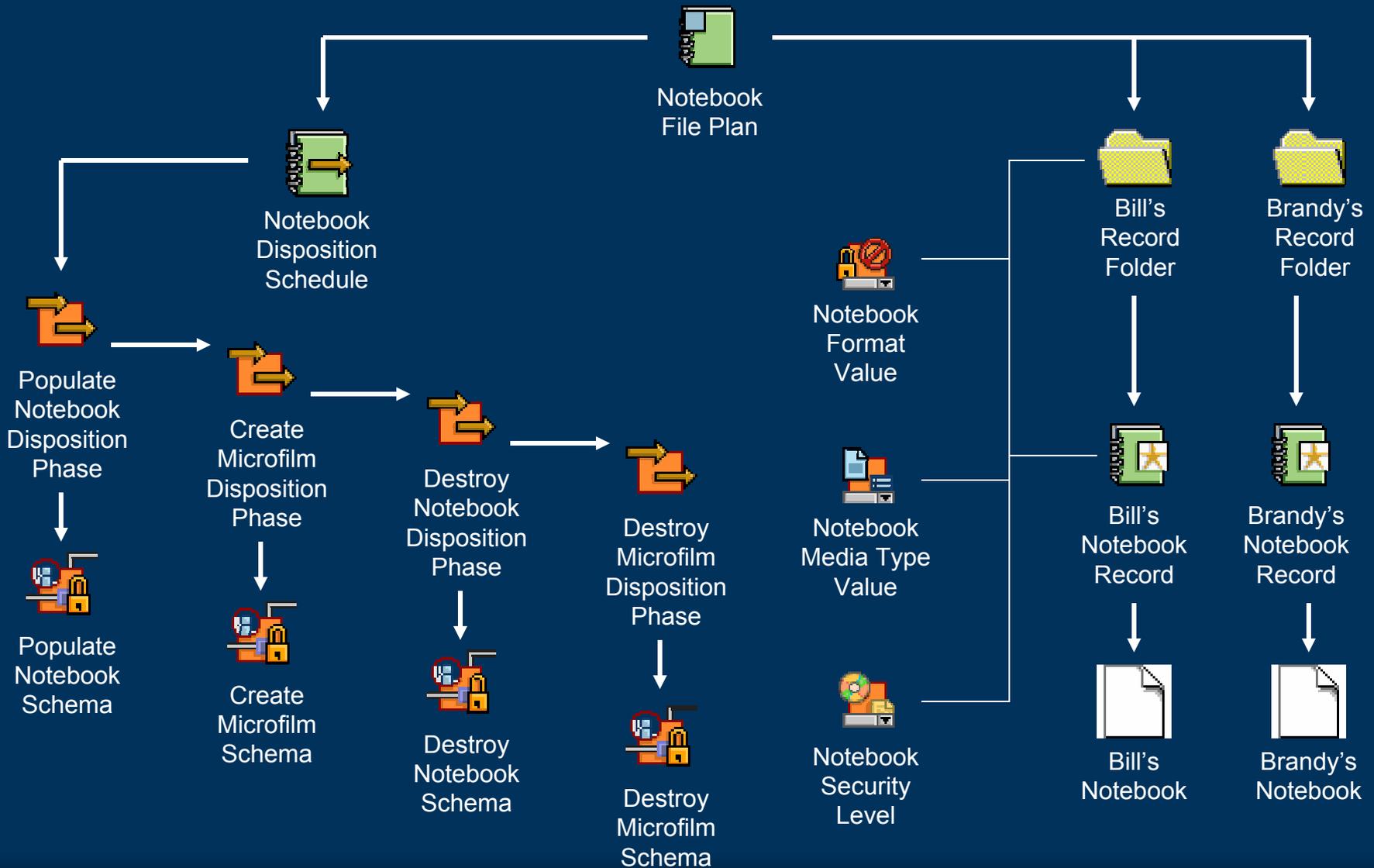


# Physical Notebook Disposition Schedule





# Physical Notebook Records Management Structure





## ▶ Format Value

- ▶ Describes the format to classify records and record folders
  - ▶ Examples: Microsoft Word (DOC), computer graphics metafile (CGM), and portable document format (PDF).



## ▶ Media Type

- ▶ Describes the storage medium to classify records and record folders
  - ▶ Examples: paper, hard disk, tape, CDR, DVD, microfilm



## ▶ Security Level

- ▶ Describes the security property to classify records and record folders
  - ▶ Examples: unclassified, proprietary, R&D Only





## ▶ Record Folders

- ▶ Contain RMA records and subordinate Record Folders that share a common disposition process. The File Plan that applies to a Record Folder applies to all of the Record Folder's contents, unless a subordinate Record Folder has a separate File Plan relationship.
  - ▶ Record Folders have two states: open and closed. Records can be added to a Record Folder that is open. Only authorized users can change a Record Folder's state.



## ▶ RMA records

- ▶ Business items that are subject to disposition control. The RMA Record class exposed in Teamcenter Enterprise is a subclass of RMA Document, itself a subclass of Generic Document
- ▶ Any product business item class can be exposed as an RMA record through customization (expose attributes in thin client).



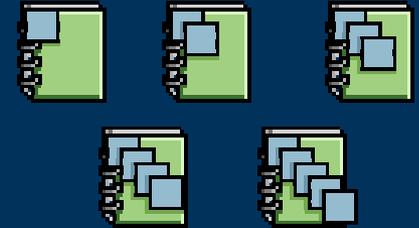


# File Plan and Disposition Items



## ▶ File Plan

- ▶ Identifies the organization and disposition characteristics of its related folders and records
- ▶ Can be structured in multiple levels



## ▶ Disposition Schedule

- ▶ Defines the sequence of steps to disposition the records in a file plan



## ▶ Disposition Phase

- ▶ Defines one step in a file plan's disposition sequence



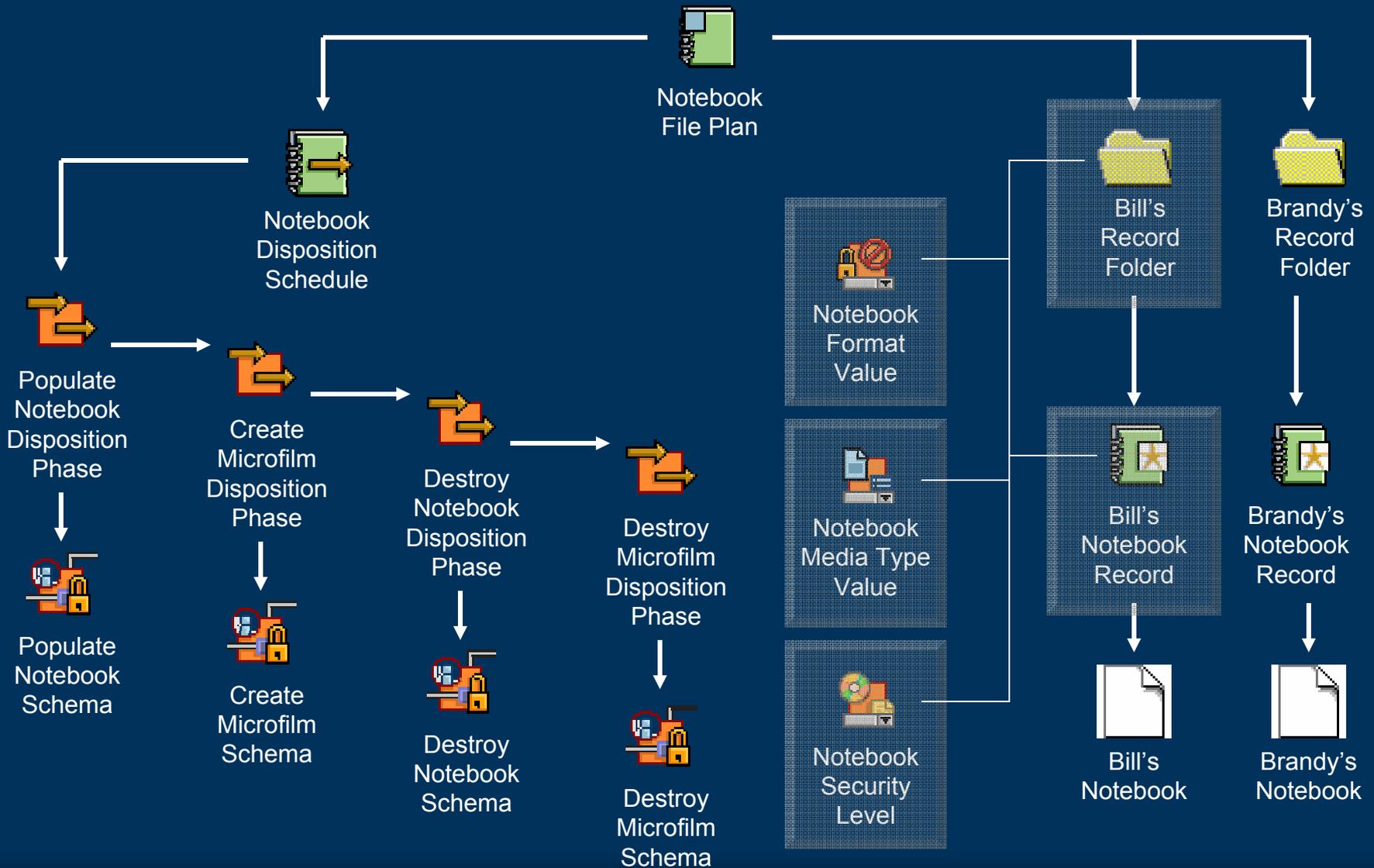
## ▶ Disposition Schema

- ▶ Describes details of how a record is disposed
  - ▶ retention interval (duration)
  - ▶ action (interim transfer, accession, RMA freeze, destroy)
  - ▶ accession location
  - ▶ disposition instruction type (time, event, time and event)





# Physical Notebook Records Management Structure





# Records Management Processing

Electronic Notebook Example



# Electronic Notebook Scenario Overview



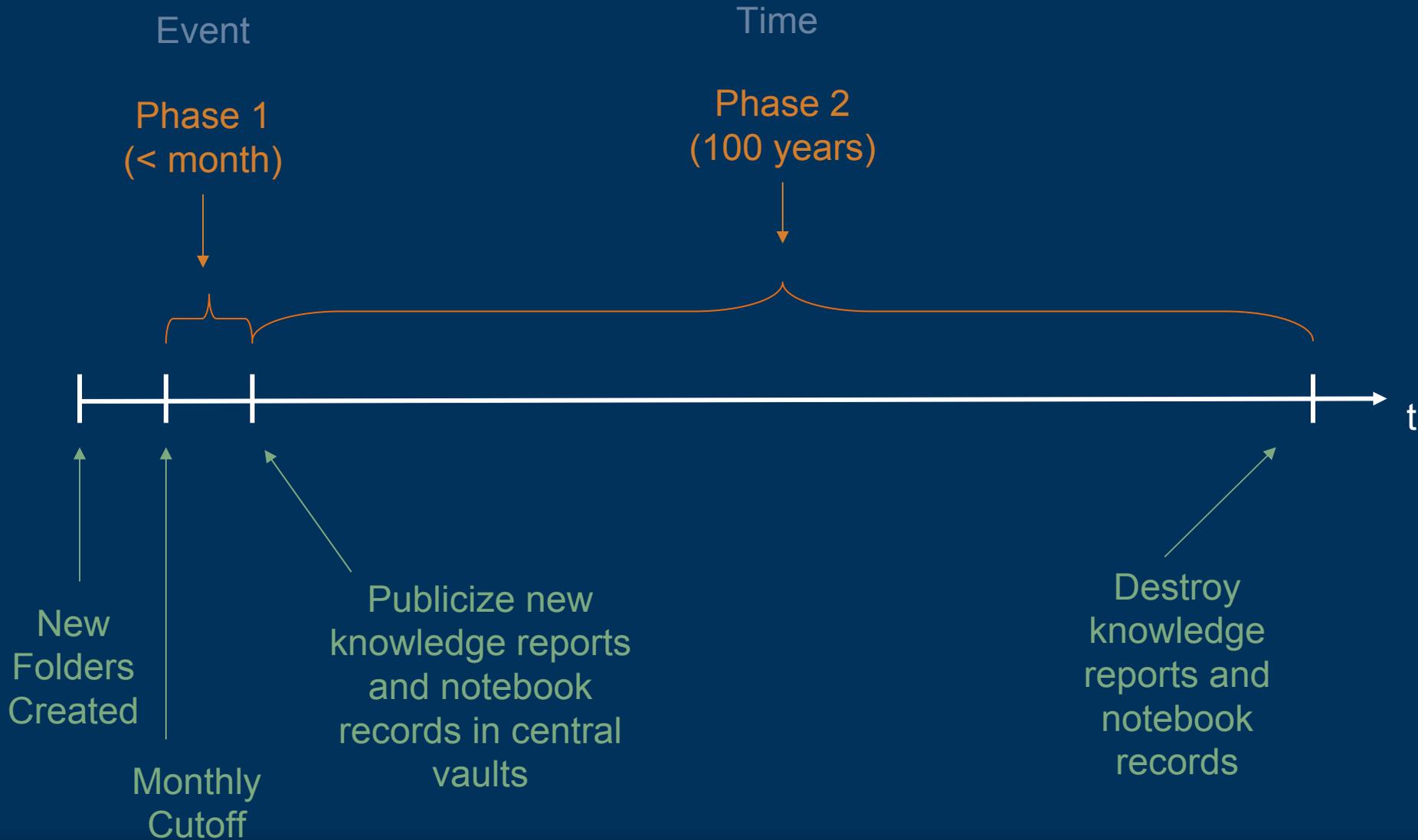
- ▶ Central Records organization creates new electronic folders to hold notebook and knowledge reports (i.e. for new employee)
- ▶ On a monthly basis the folder contents are cutoff:
  - ▶ The newly cutoff items in the notebook folders are automatically transitioned from a “Not Scheduled” to a “Scheduled” state.
  - ▶ New knowledge reports are automatically transitioned from a “Not Scheduled” to a “Scheduled” state.
- ▶ Within the next month, the recently cutoff information is “publicized”:
  - ▶ “Scheduled” knowledge reports are transferred to a central knowledge vault.
  - ▶ “Scheduled” notebook contents are transferred to a central notebook vault.
- ▶ After 100 years, both the knowledge and notebook records are deleted from their respective central vaults

## Note:

- ▶ By default, the knowledge vault is in scope for Enterprise users doing searches. If users find information in the knowledge vault and are interested in additional information in the Notebook vault, they can expand their scope to include the notebook information.

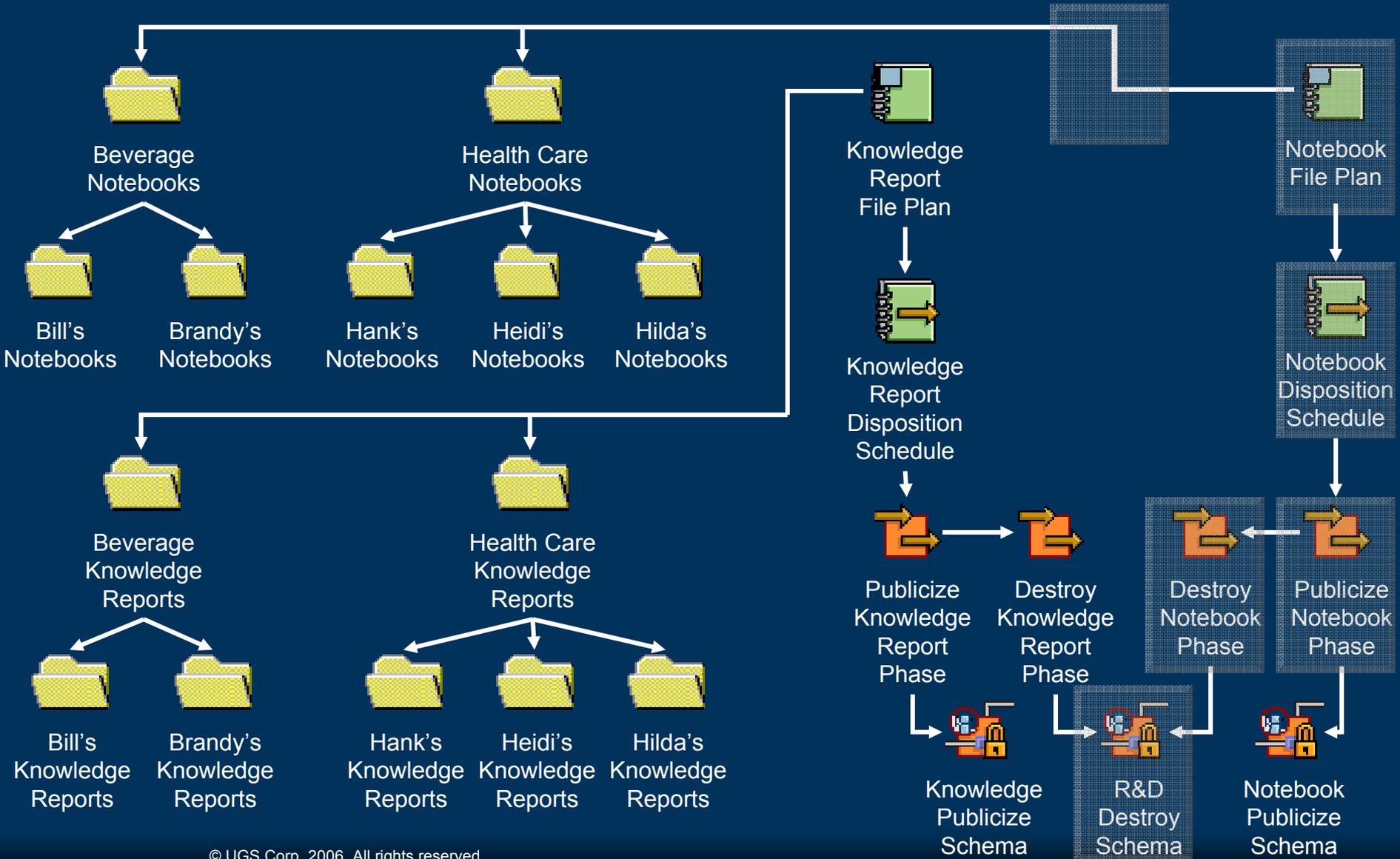


# Electronic Notebook Disposition Schedule





# Electronic Notebook Scenario Model





# Record States



- ▶ Not Scheduled
- ▶ Scheduled
- ▶ Available for Disposition
- ▶ Record Disposed
- ▶ Frozen



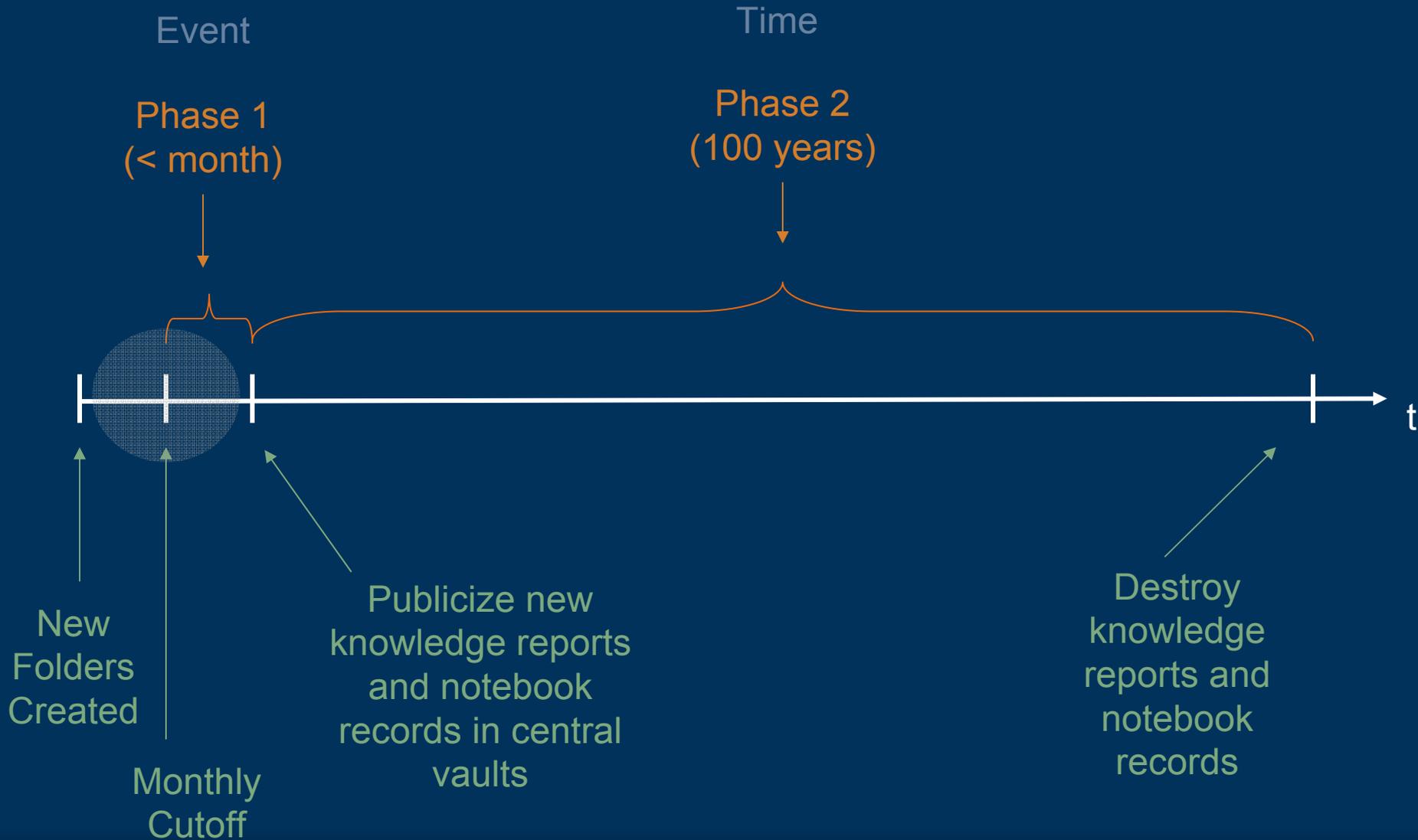
# Service Schedule



- ▶ The RMA Service Schedule is an administrative object, a Service Schedule using the *Process Service rmaclient*
- ▶ The Service Schedule determines which RMA records are ready for either folder cutoff or the next Disposition Phase and notifies the responsible party

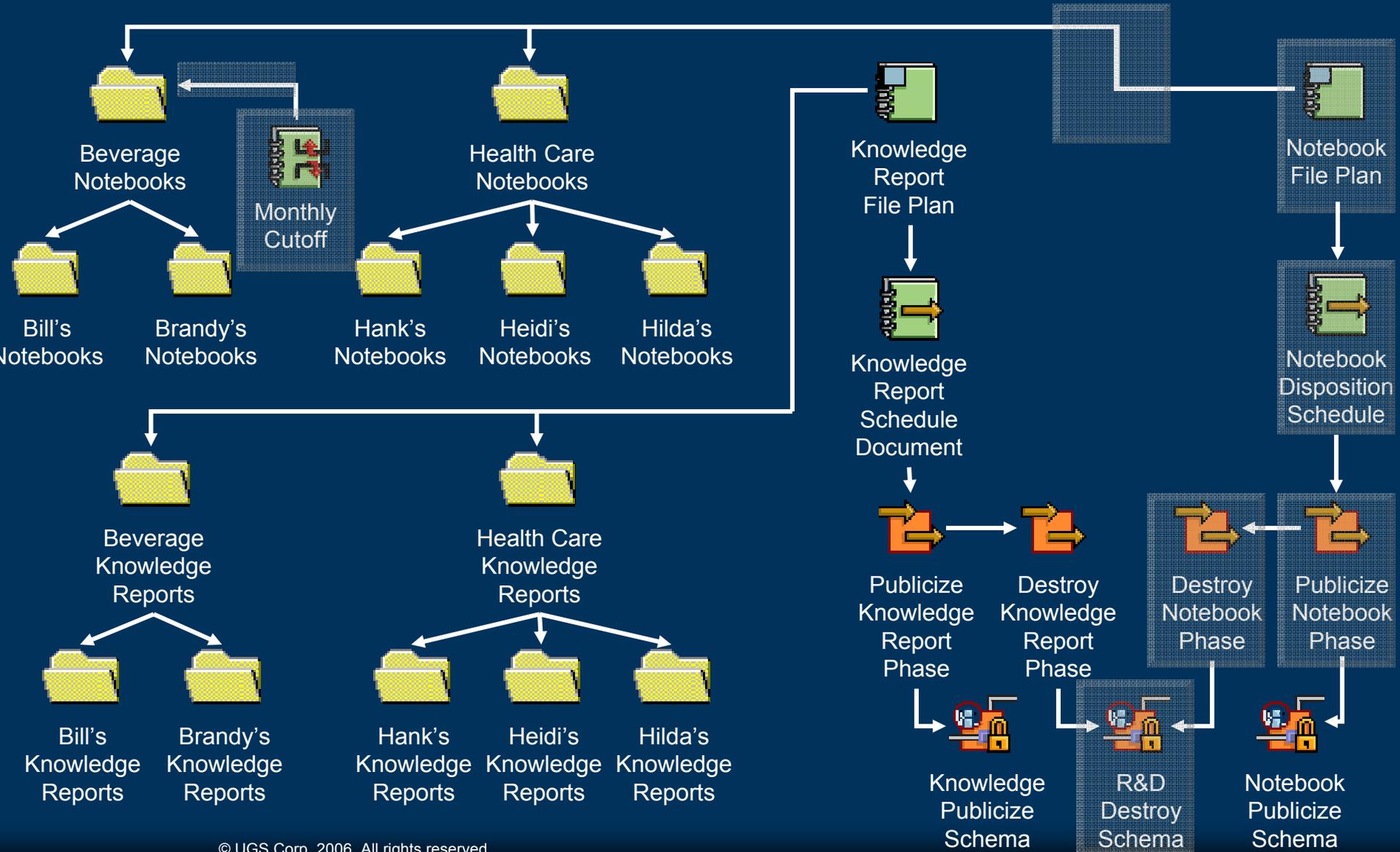


# Electronic Notebook Disposition Schedule





# Electronic Notebook Scenario Model





# Cutoff Instruction

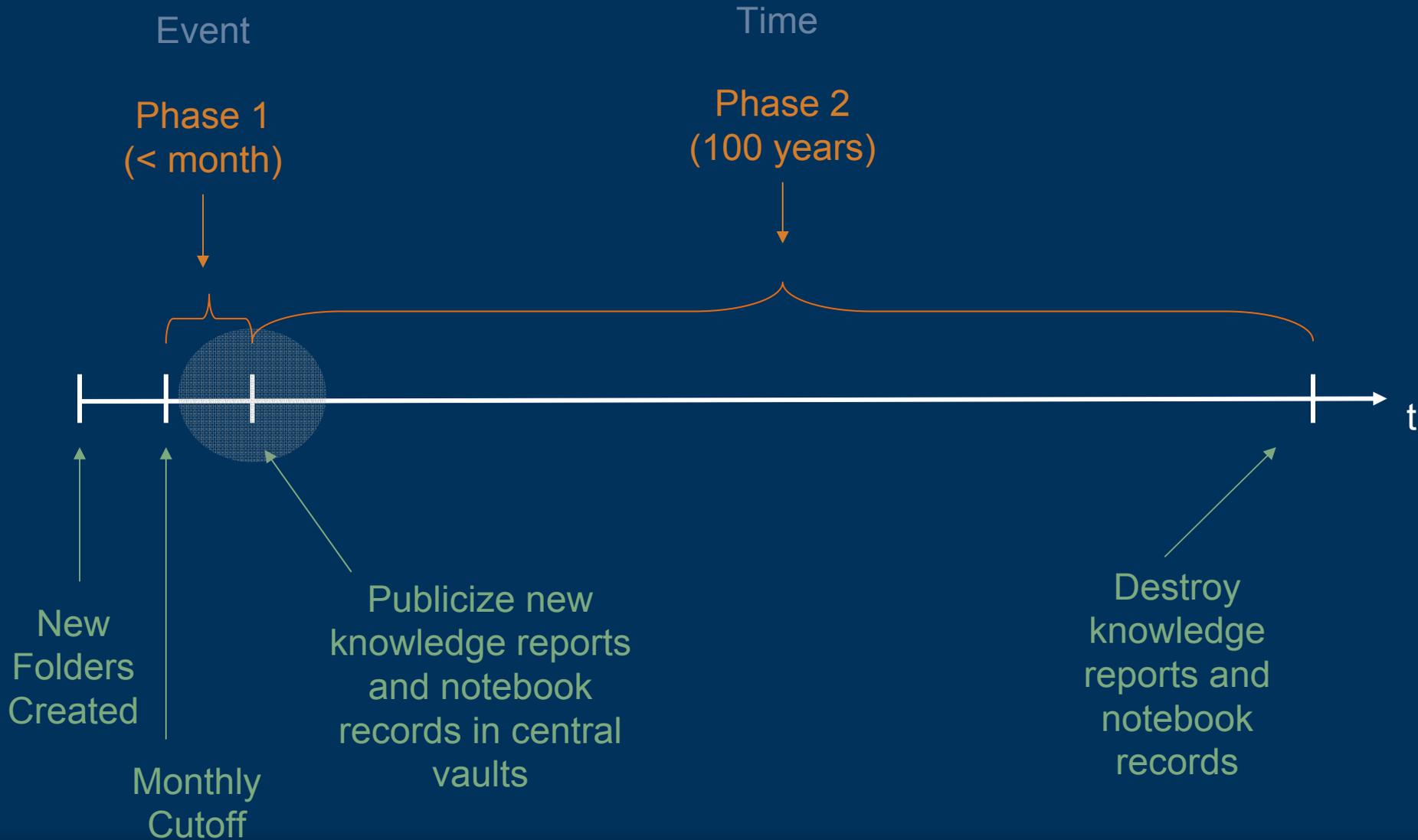


- ▶ Applied to a Record Folder
- ▶ Specifies the cutoff date and period used to successively start disposition processing
- ▶ The RMA record's *Record State* is set to *Scheduled* which starts the disposition process
- ▶ Following cutoff, the Cutoff Instruction's *Cutoff Date* is incremented by the Cutoff Instruction's *Cutoff Period* value





# Electronic Notebook Disposition Schedule





# Change Record State to “Disposed”



Search  → Home Exit

Advanced Search... James Watt (RMA Disposition Action Grp)

Check Out Submit Item Reports History Bookmark More Actions...

## Beverage R&D Notebook - Bill - 2004,A,1,1

Summary Assignment Properties Files Related Items Reviewers Security Changes

|                         |   |
|-------------------------|---|
| Name:                   | Beverage R&D Notebook - Bill - 2004,A,1,1 |
| Document Name:          | Beverage R&D Notebook - Bill - 2004       |
| Organization Name:      |   |
| Rev:                    | A   |
| Seq:                    | 1   |
| Subject:                | Beverage R&D Notebook - Bill - 2004       |
| Owner:                  | RMA R&D Notebook Vault                    |
| Title:                  | Beverage R&D Notebook - Bill - 2004       |
| Type:                   |   |
| Project Name:           |   |
| Creation Date:          |   |
| Creator:                | percy.pilcher                             |
| Frozen?:                | true                                      |
| Current Life Cycle:     |   |
| Life Cycle State:       | Working                                   |
| Check Out User/Vault:   |   |
| Last Update:            |   |
| Planned Release Date:   |   |
| Actual Release Date:    |   |
| Planned Effective Date: |   |
| Actual Effective Date:  |   |
| Index Language:         | English                                   |
| Author:                 |   |
| Organization Name:      |   |
| Authored Date:          | 04/07/2005                                |
| Format:                 | Notebook                                  |
| Media Type:             | Paper                                     |

Left sidebar menu: Lists (My Work Lists, My Lists, My Teams), Create (Part, Documents, Changes, Facility, Vendor Items, Report Items, GDH Items, Project, Template, Options & Variants, Others ...), Reports, Preferences, Logs, In Service, Help

# Advance Record to next Disposition Phase



Search

Advanced Search... James Watt (RMA Disposition Action Grp)

Home Exit

Check Out Submit Item Reports History Bookmark More Actions...

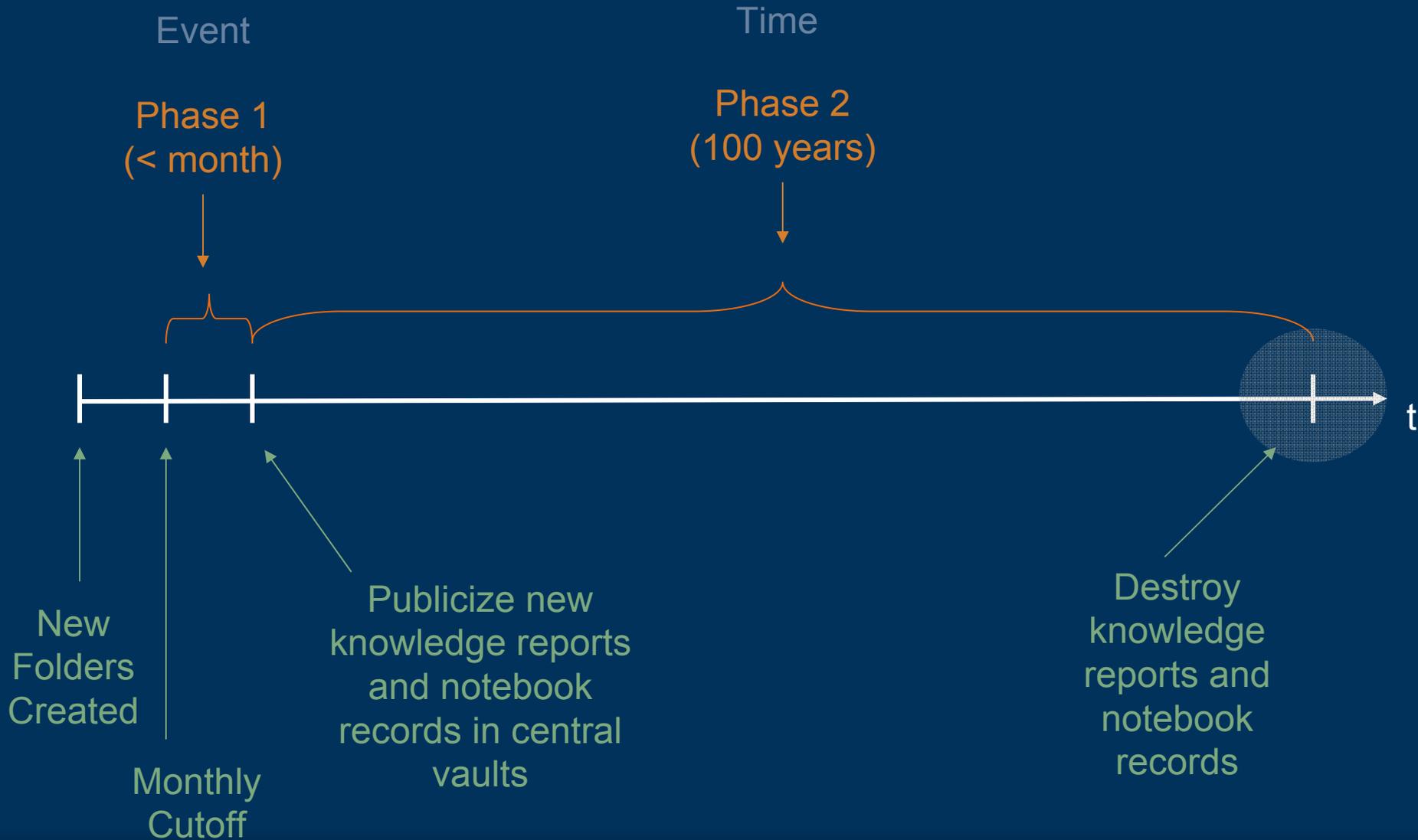
Beverage R&D Notebook - Bill - 2004,A,1,1

Summary Assignment Properties Files Related Items Reviewers Security Changes

|                                 |   |
|---------------------------------|---|
| Actual Effective Date:          |   |
| Index Language:                 | English   |
| Author:                         |   |
| Organization Name:              |   |
| Authored Date:                  | 04/07/2005  |
| Format:                         | Notebook  |
| Media Type:                     | Paper   |
| Security Level:                 | R&D Only  |
| Addressee(s):                   |   |
| Other Addressee(s):             |   |
| Archive Date:                   | 03/15/2005  |
| Record Identifier:              |   |
| Record Category Name:           | Notebook File PlanBeverage R&D NotebooksBeverage R&D Notebooks - Bill |
| Disposition Authority:          | UGS-CPR-4510  |
| Vital Record Indicator:         |   |
| Review:                         |   |
| Recur every:                    |   |
| Last Review Date:               |   |
| Next Review Date:               |   |
| Permanent Record Indicator:     |   |
| Record State:                   | Record Disposed   |
| Current Disposition Phase:      | Publicize Notebook Phase  |
| Current Disposition Date:       |   |
| Current Disposition Completed?: | False   |
| Reason For Freeze:              |   |



# Electronic Notebook Disposition Schedule





# Delete Notebook Record



TEAMCENTER Search [ ] Home Exit  
Advanced Search... James Watt (RMA Disposition Action Grp)

Check Out Submit Item Reports History Bookmark More Actions...

**Beverage R&D Notebook - Bill - 2004,A,1,1**

Summary Assignment Properties Files Related Items Reviewers Security Changes

|                                 |   |
|---------------------------------|---|
| Actual Effective Date:          |   |
| Index Language:                 | English   |
| Author:                         |   |
| Organization Name:              |   |
| Authored Date:                  | 04/07/2005  |
| Format:                         | Notebook  |
| Media Type:                     | Paper   |
| Security Level:                 | R&D Only  |
| Addressee(s):                   |   |
| Other Addressee(s):             |   |
| Archive Date:                   | 03/15/2005  |
| Record Identifier:              |   |
| Record Category Name:           | Notebook File Plan Beverage R&D Notebooks Beverage R&D Notebooks - Bill |
| Disposition Authority:          | UGS-CPR-4510  |
| Vital Record Indicator:         |   |
| Review:                         |   |
| Recur every:                    |   |
| Last Review Date:               |   |
| Next Review Date:               |   |
| Permanent Record Indicator:     |   |
| Record State:                   | Available For Disposition   |
| Current Disposition Phase:      | Destroy Notebook Phase  |
| Current Disposition Date:       |   |
| Current Disposition Completed?: | False   |
| Reason For Freeze:              |   |

Edit



# Track Record from Creation to Deletion



| # | User / Process             | Initial Record State      | Action / Comment  | End Record State          |
|---|----------------------------|---------------------------|---|---------------------------|
| 1 | Notebook Author            | n/a                       | Create Notebook record. Check Notebook in to vault. Relate Notebook to Record Folder.   | Not Scheduled             |
| 2 | rmaclient Schedule Service | Not Scheduled             | When the folder cutoff date is reached, any items in the folder that are "Not Scheduled" automatically get changed to a "Scheduled" state and enter the first Disposition Phase of the folder's Disposition Schedule. Disposition Instruction Type = Event. | Scheduled                 |
| 3 | Record's Responsible Party | Scheduled                 | Manually change the Notebook's Record State to "Available for Disposition".   | Available for Disposition |
| 4 | Record's Responsible Party | Available for Disposition | Transfer notebook to central notebook vault, then use the Change RMA State action to set Record State to "Record Disposed".   | Record Disposed           |
| 5 | Record's Responsible Party | Record Disposed           | Submit Notebook to "RMA Advancer" life cycle. Disposition Instruction Type = Time   | Scheduled                 |
| 6 | rmaclient Schedule Service | Scheduled                 | When the Retention Period criteria for Notebook's current Disposition Phase has been met (100 year period), automatically change Notebook's Record State to "Available for Disposition" and notify the Responsible Party.                                   | Available for Disposition |
| 7 | Record's Responsible Party | Available for Disposition | Responsible Party deletes the Notebook. (The only references that remain in the system are in the Audit Records.)   | n/a                       |

Phase 1

Phase 2



**UGS**

*Transforming the  
process of innovation*



**DoD Example**



# Records Management Standard



- ▶ DoD 5015.2 Standard – Detailed Requirements:
  - ▶ 2.2.1 Implementing File Plans
  - ▶ 2.2.2 Scheduling Records
  - ▶ 2.2.3 Declaring and Filing Records
  - ▶ 2.2.4 Filing Electronic Mail Messages
  - ▶ 2.2.5 Storing Records
  - ▶ 2.2.6 Retention and Vital Records Management
  - ▶ 2.2.7 Access Controls
  - ▶ 2.2.8 System Audits
  - ▶ 2.2.9 System Management Requirements
  - ▶ 2.2.10 Additional Baseline Requirements
- ▶ Certifiable RMA functionality in Teamcenter Enterprise 2005 SR1
- ▶ Scheduled to be certified by the JITC (August 2006)



<http://jitc.fhu.disa.mil/recmgt/>



# DoD Scenario Overview

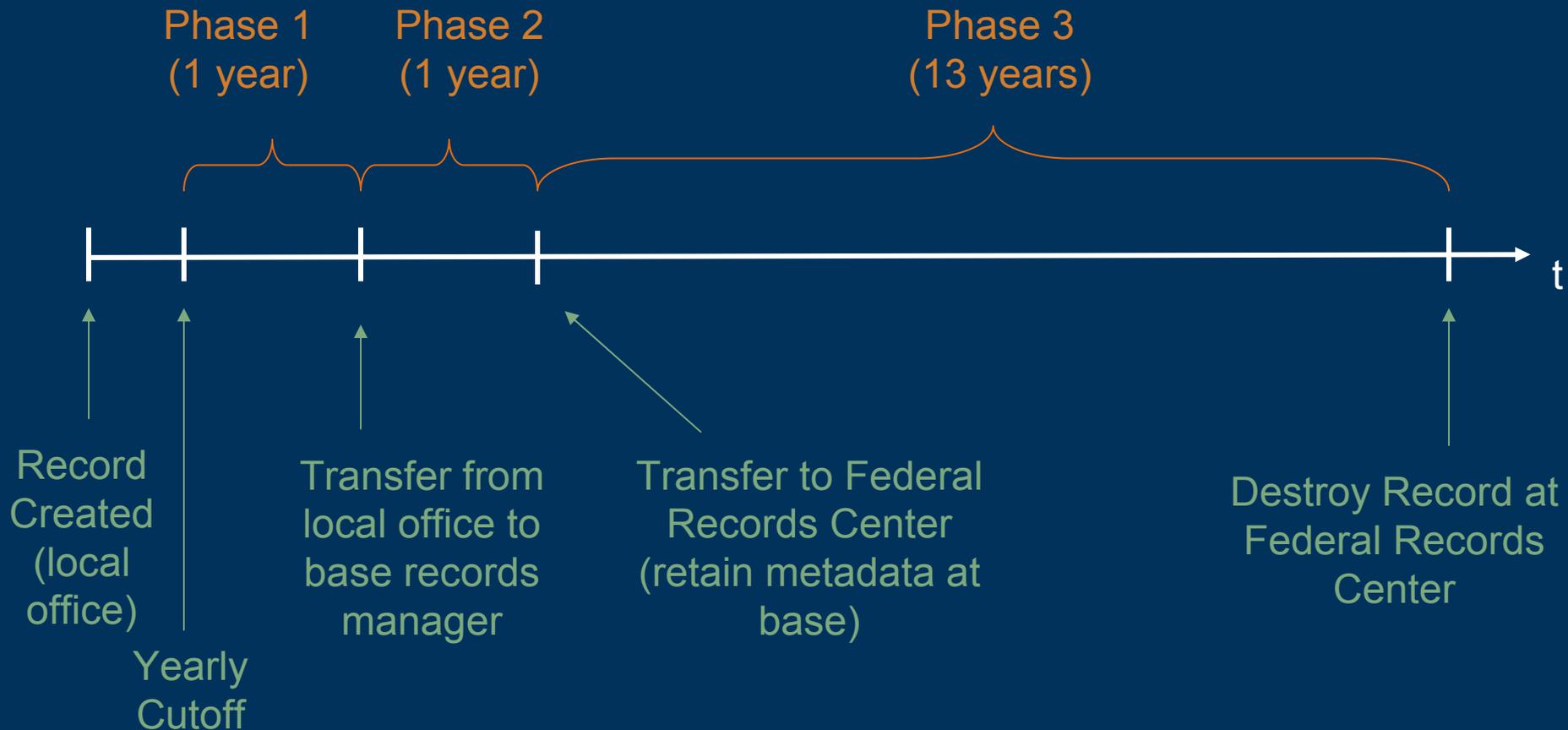


## Air Force Enterprise Information Management

- ▶ Management and control of records over 8 years must be transferred to Federal Records Center
  - ▶ Cutoff after 1 year
  - ▶ Under Local Office control for 1 year after cutoff
  - ▶ Under Base Records Manager control for 1 year
  - ▶ Transfer to Federal Records Center
    - ▶ Base Records Manager retains metadata information only
  - ▶ Destroy after 15 year



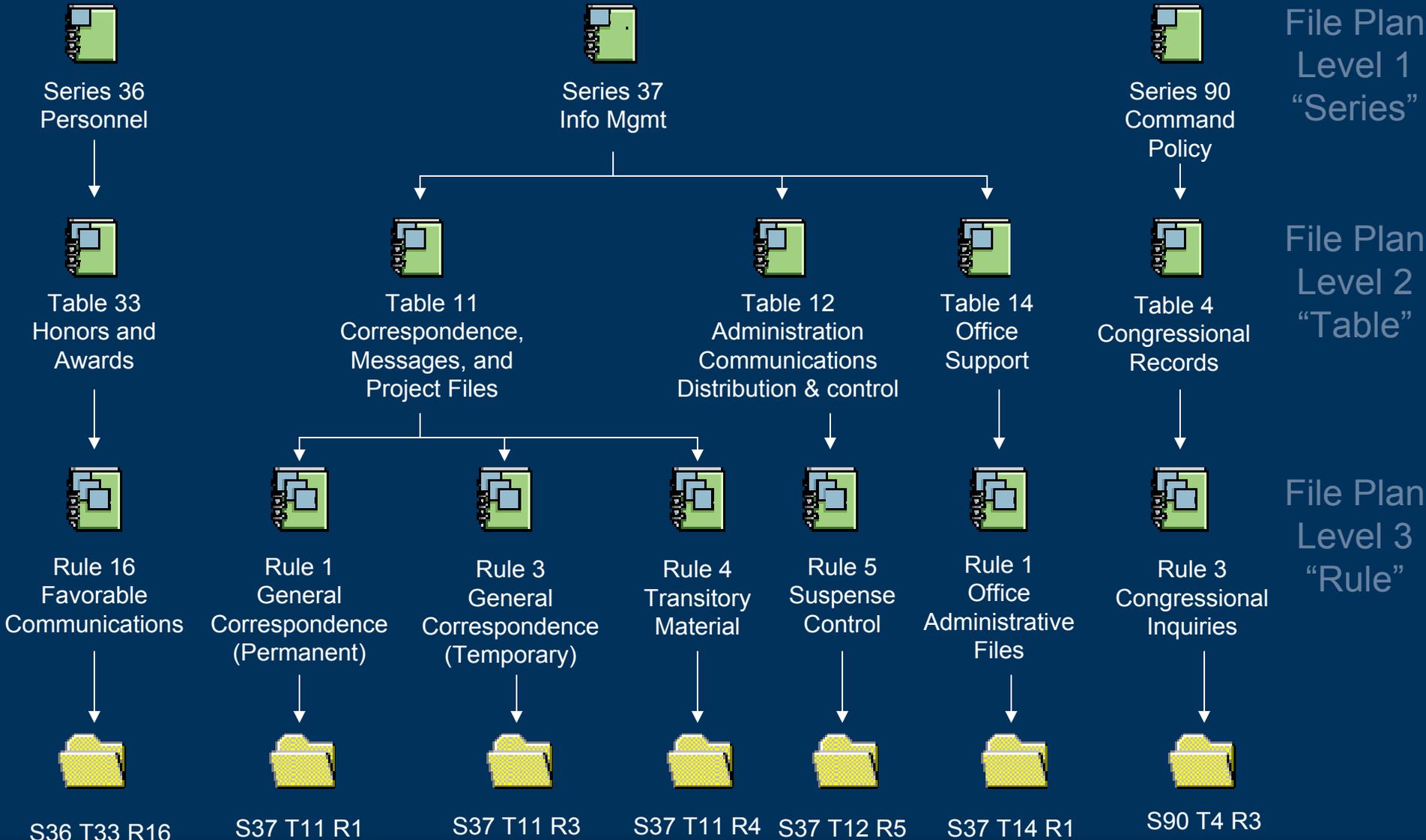
# DoD Scenario (Congressional Inquiry) Disposition Schedule





# DoD Scenario

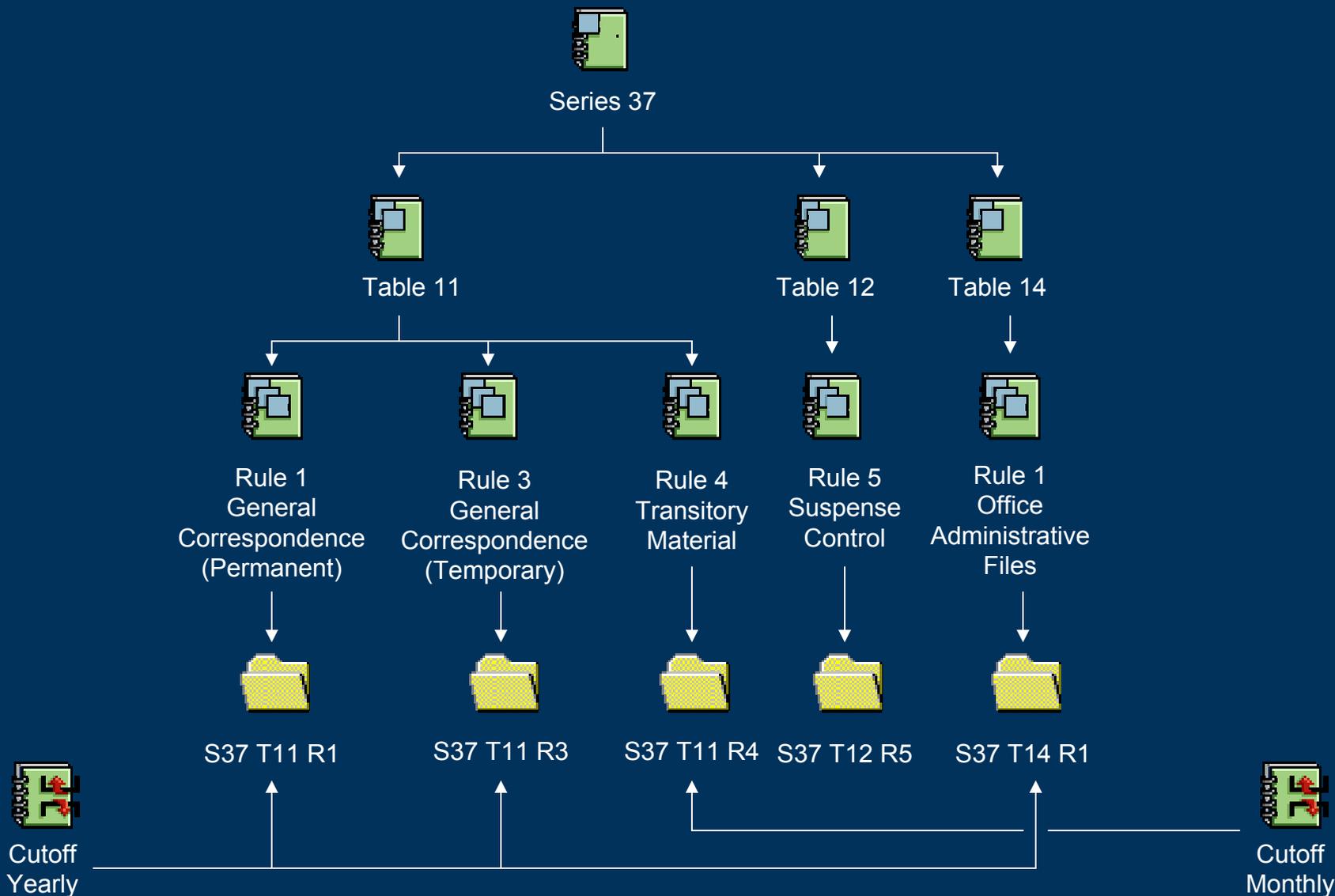
## Subset of Multi-level File Plan (>3000 rules)





# DoD Scenario

## Record Folder Cutoff





# Disposition Authority Item



- ▶ Disposition Authority
  - ▶ An item that represents an entity with the legal or business authority to transfer RMA records to storage or to dispose of them
  - ▶ Leaf node File Plans identify the Disposition Authority responsible for the disposition of the RMA records controlled by that File Plan



# DoD Scenario Disposition Authority



  
Disposition Authority  
NCI-AFU-80-8

  
Disposition Authority  
NI-AFU-90-3

  
Rule 1  
General  
Correspondence  
(Permanent)

  
Rule 3  
General  
Correspondence  
(Temporary)

  
Rule 4  
Transitory  
Material

  
Rule 5  
Suspense  
Control

  
Rule 1  
Office  
Administrative  
Files



S37 T11 R1

S37 T11 R3

S37 T11 R4

S37 T12 R5

S37 T14 R1



Cutoff  
Yearly



Cutoff  
Monthly



# Create Disposition Authority



The screenshot shows the TEAMCENTER web interface. At the top right, there are links for 'Home' and 'Exit', and the user name 'Percy Pilcher (RMA Admin Grp)'. On the left is a navigation sidebar with sections: 'Search' (with a dropdown menu showing 'Configuration Item'), 'Advanced Search...', 'Lists' (with 'My Admin' and 'Saved Searches'), 'New' (with 'Others ...'), 'Logs', and 'Help'. The main content area is titled 'New Disposition Authority Value: Properties' and contains a form with the following fields: 'Authority Name: \*' with the value 'UGS-CPR-4510', 'Remark: \*' with the value 'UGS-CPR-4510', and 'Description:'. At the bottom of the form are two buttons: '< Back' and 'Finish', with a mouse cursor pointing at the 'Finish' button. A help icon (?) is visible in the top right corner of the form area.



# Audit Items



- ▶ *Audit Record* objects are business items that track user activity logs. They are designed to be subject to RMA's disposition processing.
- ▶ *Audit Trail* objects are the user activity “data item” log files attached to an Audit Record





# DoD 5015.2 Additional Features



Records Management is delivered via 2 installation modules:

- ▶ RMA – Records Management functionality (required)
- ▶ RM5 – DoD Nomenclature and required attributes (optional)
  
- ▶ Nomenclature
  - ▶ “Authored Date“ to "Publication Date“ (3 variations)
  - ▶ "Creation Date" to "Date Filed“ (3 variations)
  - ▶ "Created" to "Date Filed"
  - ▶ "Creator" to "Originator"
  - ▶ "Organization Name" to "Originating Organization"



- ▶ Required Attributes
  - ▶ For File Plan (Create, Update, and Copy dialogs)
    - ▶ "Disposition Authority"
    - ▶ "Permanent Record Indicator"
    - ▶ "Record Category Description"
    - ▶ "Vital Record Indicator"
  - ▶ For RMA Record (Create, Update, and Copy dialogs)
    - ▶ "Author"
    - ▶ "Format"
    - ▶ "Media Type"
    - ▶ "Originating Organization"
    - ▶ "Publication Date"
    - ▶ "Subject"



- ▶ Secure Erase
  - ▶ Upon record deletion, files are overwritten on disk to prevent access by disk/file recovery tools
  - ▶ Does not apply to metadata in data base
  - ▶ Secure Erase is enabled by setting the configuration variable `RMA_ERASECOUNT` to "1" or greater
  - ▶ Delivered as part of core Teamcenter Enterprise



# Additional Related Core Features (cont.)



- ▶ User Activity Logging
  - ▶ User actions
  - ▶ Object accessed
  - ▶ Configurable



## Outlook Integration

- ▶ Support capture of e-mail
  - ▶ E-mail message only
  - ▶ E-mail message with attachments
  - ▶ Attachments - 1 or more files per document
- ▶ Application Centric Capture
  - ▶ Initiate from Outlook
  - ▶ Uses the normal Create process with prefilled content
  - ▶ Captured e-mail marked in Outlook

### Mail

- Favorite Folders**
- Inbox (29)
  - For Follow Up [12]
  - Sent Items
  - Deleted Items (73)
  - Drafts [20]
  - Outbox
- All Mail Folders**
- Mailbox - Bapat, Anjali
    - Deleted Items (73)
    - Drafts [20]
    - Inbox (29)
    - Junk E-mail
    - Outbox
    - Sent Items
    - Search Folders
      - For Follow Up [12]
      - Large Mail
  - Archive Folders
  - Personal Folders
    - Deleted Items
    - Drafts [2]
    - Inbox
      - Admin\_HR related
      - Benefits

- Mail
- Calendar
- Contacts
- Tasks
- Notes

Look for: Search In: Inbox Find Now Clear Options

- Inbox**
- Arranged By: Date Newest on top
- Today**
- AH-MOSAdmin** 11:21 AM  
[MOS] Software Requirements Specifi...  
TC Registered:
  - Bapat, Anjali** 11:15 AM  
Test message with many attachme...  
TC Registered:
  - Bapat, Anjali** 11:12 AM  
Message with no attachments  
TC Registered: Message Only
  - AH-MOSAdmin** 11:11 AM  
[MOS] Documentation Impact Statem...  
TC Registered:
  - Lee, Nick T** 10:46 AM  
RE: Screen Shot  
TC Registered:
  - Sheets, Larry** 9:01 AM  
FW: Make target issue using new buil...  
TC Registered:
  - Talwalkar (EXT), Saurabh** 7:53 AM  
help on file upload.  
TC Registered:
  - Affuso, Tony** 7:12 AM  
Q1 Performance and Brand Update  
TC Registered:
  - Resource - SMD Clear Case admin .**  
TCCS13756 Closed  
TC Registered:
  - Sanders, Philip S.** 6:04 AM  
upghp1 down Thursday (4/29) 6-8:3...  
TC Registered:
  - Resource - SMD Clear Case admin .**

### Test message with many attachments

Bapat, Anjali

**To:** Lee, Nick T; Luo, Shengbiao  
**Cc:** Bapat, Anjali

**Attachments:** 1.txt (4 KB); Excel Worksheet.xls (16 KB); index.html (4 KB);  
 New Microsoft Word Document.doc (17 KB); presentation.ppt (15 KB)

Test mail with attachments



**UGS**

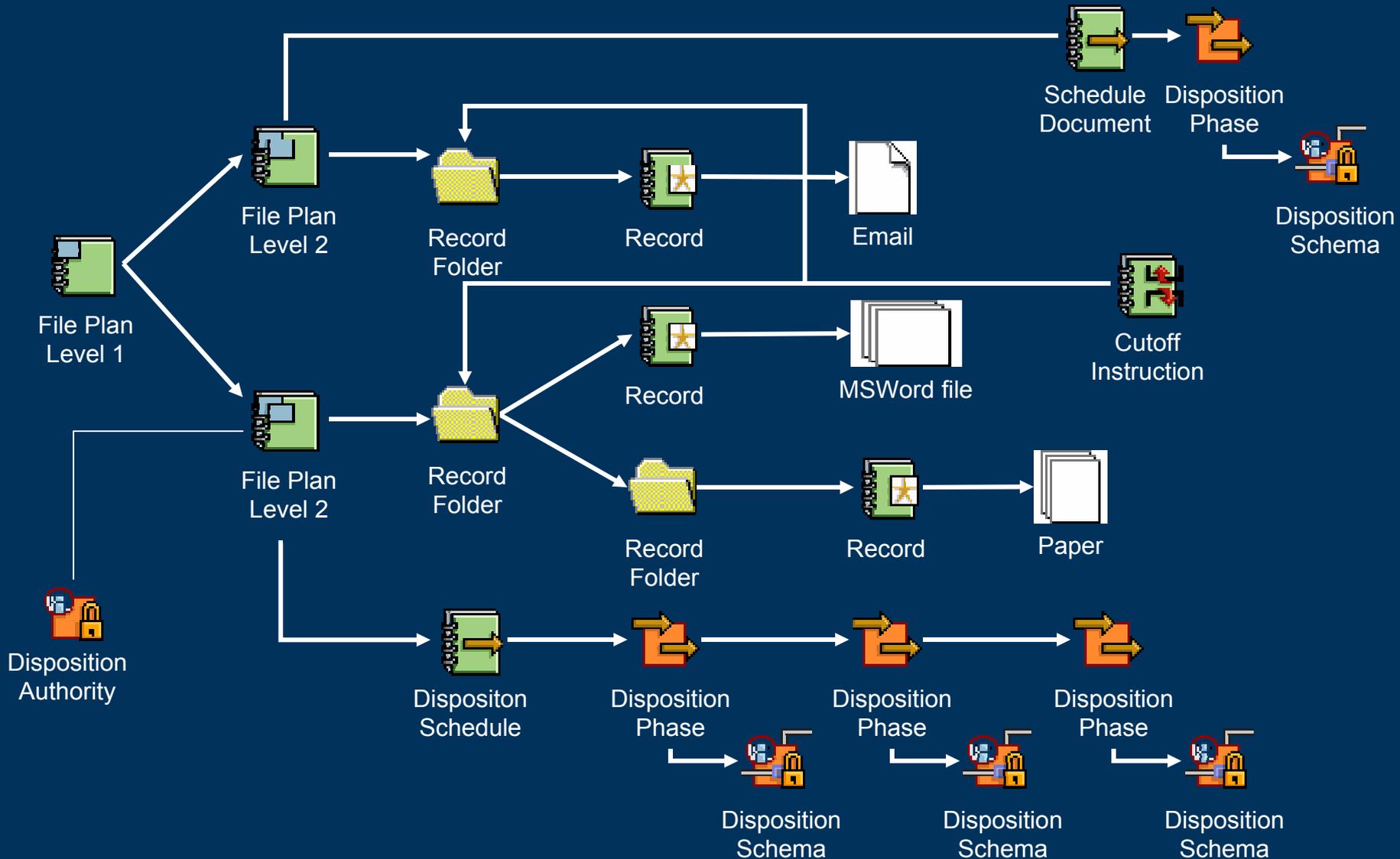
*Transforming the  
process of innovation*



Summary



# Item Summary





# Scenario Summary



## Physical Notebook

- ▶ RMA Structure
  - ▶ File Plan
  - ▶ Record Folder
  - ▶ RMA Record
  - ▶ Disposition Schedule
  - ▶ Disposition Phases
  - ▶ Disposition Schema
  - ▶ Format Value
  - ▶ Media Type Value
  - ▶ Security Level

## Electronic Notebook

- ▶ RMA Processing
  - ▶ Record Folder Cutoff
  - ▶ Record States
  - ▶ RMA Service Schedule
  - ▶ Notifications
- ▶ File Plan Propagation
- ▶ Reuse of Items

## DoD Example

- ▶ Multi-level file plan
- ▶ Disposition Authority
- ▶ Audit/logging
- ▶ Outlook Integration
- ▶ Secure Erase
- ▶ DoD 5015.2-Std
  - ▶ Special Features
    - ▶ Nomenclature
    - ▶ Required attributes
  - ▶ Certification



**UGS**

*Transforming the  
process of innovation*



Thank you

[drew.donovan@ugs.com](mailto:drew.donovan@ugs.com)



# Create Format Value



Home Exit  
Percy Pilcher (RMA Admin Grp)

**Search**

Configuration Item

Advanced Search...

**Lists**

My Admin

Saved Searches

**New**

Others ...

**Logs**

**Help**

**New Format Value: Properties**

Format Value: \*

Description:



# Create Media Type Value



Home Exit  
Percy Pilcher (RMA Admin Grp)

TEAMCENTER

Search Configuration Item  
Advanced Search...  
Lists  
My Admin  
Saved Searches  
New  
Others ...  
Logs  
Help

**New Media Type Value: Properties**

Media Type Value: \*

Description:



# Create Security Level



Home    Exit  
Percy Pilcher (RMA Admin Grp)



**Search**   
Configuration Item   
 

Advanced Search...

**Lists**   
My Admin  
Saved Searches

**New**   
Others ...

**Logs**   
**Help** 

 **New Security Level: Properties** 

Security Level: \*

Description:



# Create Record Folder



TEAMCENTER Search  → Home Exit  
Advanced Search... Percy Pilcher (RMA Admin Grp)

**Lists**

- My Work Lists
- My Lists
- My Teams

**Create**

- Part
- Documents
- Changes
- Facility
- Vendor Items
- Report Items
- GDH Items
- Project
- Template
- Options & Variants
- Others ...

**Reports**

**Preferences**

**Logs**

**In Service**

### New Record Folder: Properties

Folder Name: \*

Organization Name:

Project Name:

Rev: A

Subject: \*

Title:

Addressee(s):

Author:

Authored Date:

Format:

Media Type:

Security Level:

Responsible Party:

Planned Release Date:

Planned Effective Date:

Index Language:

< Back OK



# Create RMA Record



TEAMCENTER Search  Home Exit  
Advanced Search... Percy Pilcher (RMA Admin Grp)

**Lists**  
My Work Lists  
My Lists  
My Teams

**Create**  
Part  
Documents  
Changes  
Facility  
Vendor Items  
Report Items  
GDH Items  
Project  
Template  
Options & Variants  
Others ...

**Reports**  
**Preferences**  
**Logs**  
**In Service**

### New RMA Record: Properties

Document Name: \* Beverage R&D Notebook - Bill - 2005

Organization Name:

Rev: A

Subject:

Title:

Type:

Project Name:

Responsible Party: james.watt

Planned Release Date:

Planned Effective Date:

Index Language: English

Author:

Authored Date: 04/08/2005

Format: Notebook

Media Type: Paper

Security Level: R&D Only

Addressee(s):



# Create File Plan



TEAMCENTER Search [ ] Home Exit  
Advanced Search... Percy Pilcher (RMA Admin Grp) ?

### New File Plan Level 1: Properties

|                              |   |   |
|------------------------------|---|---|
| Record Category Name 1:      | * | <input type="text" value="Notebook File Plan"/> |
| Responsible Party:           |   | <input type="text" value="percy.pilcher"/> ...  |
| Disposition Authority:       |   | <input type="text" value="UGS-CPR-4510"/> ...   |
| Record Category Code 1:      | * | <input type="text" value="Notebook FP1"/>       |
| Vital Record Indicator:      |   | <input type="text" value="v"/> ...              |
| Review:                      |   | <input type="text" value="r"/> ...              |
| Recur every:                 |   | <input type="text" value=""/>                   |
| Permanent Record Indicator:  |   | <input type="text" value="p"/> ...              |
| Record Category Description: |   | <input type="text" value=""/>                   |
| Project Name:                |   | <input type="text" value=""/> ...               |

< Back OK

Left sidebar menu:  
Lists: My Work Lists, My Lists, My Teams  
Create: Part, Documents, Changes, Facility, Vendor Items, Report Items, GDH Items, Project, Template, Options & Variants, Others ...  
Reports, Preferences, Logs, In Service



# Create Disposition Schedule



TEAMCENTER Search [ ] Home Exit  
Advanced Search... Percy Pilcher (RMA Admin Grp)

### New Schedule Document: Properties

Schedule Name: \* Notebook Schedule Document  
Rev: A  
Project Name: [ ]  
Responsible Party: james.watt [ ]  
Schedule Description: Notebook Schedule Document  
Title: [ ]  
Type: [ ]  
Planned Release Date: [ ]  
Planned Effective Date: [ ]  
Index Language: English [ ]

**Attach File(s)**

Drag and Drop or Select 'Browse...'

[ Browse... ] [ Remove ]

Delete Files after Upload

< Back [ ]



# Create Disposition Phase (Publicize)



Search  → Home Exit  
Advanced Search... Percy Pilcher (RMA Admin Grp)

**Lists**

- My Work Lists ▶
- My Lists ▶
- My Teams ▶

**Create**

- Part ▶
- Documents ▶
- Changes ▶
- Facility ▶
- Vendor Items ▶
- Report Items ▶
- GDH Items ▶
- Project ▶
- Template ▶
- Options & Variants ▶
- Others ...

**Reports** ▼

**Preferences** ▼

**Logs** ▼

**In Service** ▼

## New Disposition Phase: Properties

Phase Identifier: \* Publicize Notebook Phase

Rev: A

Project Name:  ...

Responsible Party: james.watt ...

Phase Description: Publicize Notebook Phase

Title:

Type:

Disposition Schema Identifier: \* PUB ...

Planned Release Date:  ...

Planned Effective Date:  ...

Index Language: English ...

< Back OK



# Create Disposition Schema



Home Exit  
Percy Pilcher (RMA Admin Grp)

TEAMCENTER

Search  
Configuration Item  
Advanced Search...  
Lists  
My Admin  
Saved Searches  
New  
Others ...  
Logs  
Help

**New Disposition Schema: Properties**

Description: Destroy after 100 years

Disposition Instruction Type: Time

Schema Identifier: \* D100A

Instruction Name: \* Destroy after 100 years

Instruction Code: \* D100A

Disposition Action: Destroy

Accession Location:

Retention Period: 100

-: Yearly

< Back Finish



# Create Disposition Phase (Destroy)



TEAMCENTER Search [ ] Home Exit  
Advanced Search... Percy Pilcher (RMA Admin Grp)

Check In History Item Reports Bookmark Check In To Team More Actio

Notebook FP1,1  
Summary Properties Files Related Items

|                                     | Name   | Description                | Class             | Creator       | Creation            |
|-------------------------------------|--|----------------------------|-------------------|---------------|---------------------|
| <input type="checkbox"/>            | <a href="#">Notebook Schedule Document,A,1,1</a> | Notebook Schedule Document | Schedule Document | percy.pilcher | 04/08/200 15:58:17: |
|                                     | Schedule Has Disposition Phase                   |                            |                   |               |                     |
| <input checked="" type="checkbox"/> | <a href="#">Publicize Notebook Phase,A,1,1</a>   | Publicize Notebook Phase   | Disposition Phase | percy.pilcher | 04/08/200 16:00:16: |
|                                     | Disposition Phase In Schedule                    |                            |                   |               |                     |
|                                     | Has Disposition Schema                           |                            |                   |               |                     |
| <input type="checkbox"/>            | <a href="#">PUB,Publicize,PUB</a>                | PUB,Publicize,PUB Schema   | Disposition       |               | 04/05/200 18:09:03: |

Search And Add Create and Add Add From My Bookmarks Add From My Data Add From My



# Relate File Plan to Record Folders



Search   Home Exit

Advanced Search... Percy Pilcher (RMA Admin Grp)

Check Out History Submit Item Reports Bookmark More Actions...

## Notebook FP1,1

Summary Properties Files **Related Items**

| Name   | Description | Class             | Creator       | Creation Date           |
|--|-------------|-------------------|---------------|-------------------------|
|  <a href="#">Notebook FP1,1</a> |             | File Plan Level 1 | percy.pilcher | 04/08/2005 15:50:14:031 |

  Has Disposition Schedule

**Search And Add** **Create and Add** **Add From My Bookmarks** **Add From My Data** **Add From My**



**Lists**

- My Work Lists
- My Lists
- My Teams

**Create**

- Part
- Documents
- Changes
- Facility
- Vendor Items
- Report Items
- GDH Items
- Project
- Template
- Options & Variants
- Others ...

**Reports**

**Preferences**

**Logs**

**In Service**



# Create Cutoff Instruction



Home Exit  
Percy Pilcher (RMA Admin Grp)

TEAMCENTER

Search Configuration Item

Advanced Search...

Lists  
My Admin  
Saved Searches

New  
Others ...

Logs

Help

**New Cutoff Instruction: Properties**

Cutoff Date:

Cutoff Instruction Name: \*

Description:

Cutoff Period:

:-



# Relate Cutoff Instruction to Folder



TEAMCENTER

Search  Home Exit

Advanced Search... Percy Pilcher (RMA Admin Grp)

Check Out History Submit Item Reports Bookmark More Actions...

### Notebook FP1,1

Summary Properties Files Related Items

| Name  | Description               | Class             | Creator       | Creation Date           |
|---|---------------------------|-------------------|---------------|-------------------------|
| <a href="#">Notebook FP1,1</a>                      |                           | File Plan Level 1 | percy.pilcher | 04/08/2005 15:50:14:031 |
| For Record  |                           |                   |               |                         |
| <a href="#">Beverage R&amp;D Notebooks,A,1,1</a>    | Beverage R&D Notebooks    | Record Folder     | percy.pilcher | 04/08/2005 14:21:08:940 |
| <a href="#">Health Care R&amp;D Notebooks,A,1,1</a> | Health Care R&D Notebooks | Record Folder     | percy.pilcher | 04/08/2005 14:22:11:836 |
| Has Disposition Schedule                            |                           |                   |               |                         |

**Search And Add** **Create and Add** **Add From My Bookmarks** **Add From My Data** **Add From My Teams** More Actions...



[www.ugs.com](http://www.ugs.com)

End of Screen Captures and AVIs