



Report Generation With Teamcenter Systems Engineering (TcSE)

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Overview

- ▶ Overview of the Search Module
- ▶ Different Types of Search
 - ▶ Basic Search
 - ▶ Intermediate Search
 - ▶ Advanced Search
- ▶ Export Options
 - ▶ Native UI, MS-Word, MS-Excel
- ▶ Saving Searches
- ▶ Running Saved Searches



Overview of TcSE Search Module

- ▶ **Several Ways to Enter Search Module**
 - ▶ Module Bar, Tools menu, Tool bar, Right-click menu
 - ▶ The starting point for a search is determined by the method in which the search was activated
- ▶ **Search Module Quick Tour**



Entering Search View

The screenshot shows the Teamcenter Systems Engineering interface. The 'Tools' menu is open, and the 'Search' option is highlighted with a red circle. The search results are displayed in a table below.

Folders	Subtype	Type Name
Piper Cherokee Aircraft Project	Folder	Folder
Documents	Folder	Folder
Groups	Folder	Folder
Hierarchies	Folder	Folder
Requirements	Folder	Folder
Customer Requirements	Document	Folder
Industry Requirements	Folder	Folder
Manufacturing Requirements	Folder	Folder
Aircraft Assembly Procedures	Manufacturing Requirement	Requirement
Assembling the Floor	Manufacturing Requirement	Requirement
Assembling the Floor	Manufacturing Requirement	Requirement
Assembling the Fuselage	Manufacturing Requirement	Requirement
Assembling the Fuselage	Manufacturing Requirement	Requirement
Assembling the Fuselage	Paragraph	Requirement
Assembling the Fuselage	Manufacturing Requirement	Requirement
Attaching the Tail Cone	Manufacturing Requirement	Requirement
Attaching the Tail Cone	Manufacturing Requirement	Requirement

Name	Value (All)
Approval Status	None
Assembly Facility	
Assigned To	Williams
Attachment Count	0
Baseline	
Change Time	7/20/05 10:30 AM

27 object(s); 1 selected



Starting Point for a TcSE Search

Module Currently In Use	Command Executed	Active Pane	Starting Point
Teamcenter Systems Engineering or Administration	Search module		Object in navigation tree
Teamcenter Systems Engineering	Search button on main window toolbar	Navigation tree	Selected node
		Content table	Selected object
Teamcenter Systems Engineering	Tools menu > Search command	Navigation tree	Selected node
		Content table	Selected object
Teamcenter Systems Engineering	Search from popup menu	Navigation tree	Object selected in right-clicked pane
		Content table	



Search Module Quick Tour

The screenshot shows the Teamcenter Search Module interface. The interface includes a menu bar (File, Edit, View, Tools, Help), a toolbar with icons for New Search, Open a Saved Search, and Save this Search. The main area contains a search form with fields for Search For Name, Containing text, and Types/SubTypes. The Search Type is set to Basic. Search Options include Case Sensitive and Search Subfolders. Output Options include Reuse Results Window, New Results Window, and Microsoft Word/Excel/Visio. The interface is annotated with red boxes and arrows pointing to various elements, and yellow callout boxes with red borders providing instructions.

Save this Search

Open a Saved Search

New Search

Search for string in object name (Basic & Intermediate)

Search for string in object text (Basic & Intermediate)

Limit search to one or more types/subtypes

Execute the search (as shown, saved or not)

Search Types/Modes

Other Options (defaults shown)

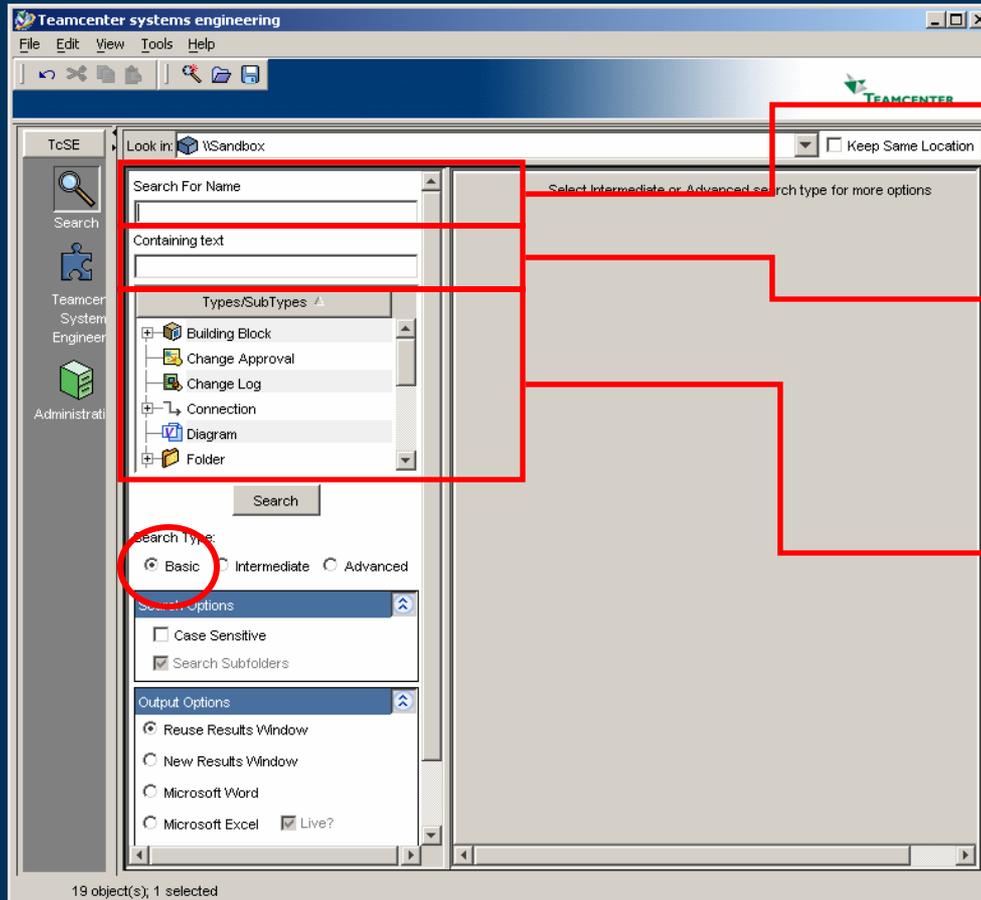


Basic Search

- ▶ Basic Search
 - ▶ Search for a text string in the object name
 - ▶ Looks in Name property
 - ▶ Search for a text string in the object text
 - ▶ Looks in Text property
 - ▶ Search one or more object subtypes
 - ▶ List of Subtypes automatically updates with those for the selected project



Basic Search



Search for string in object name
(Basic & Intermediate)

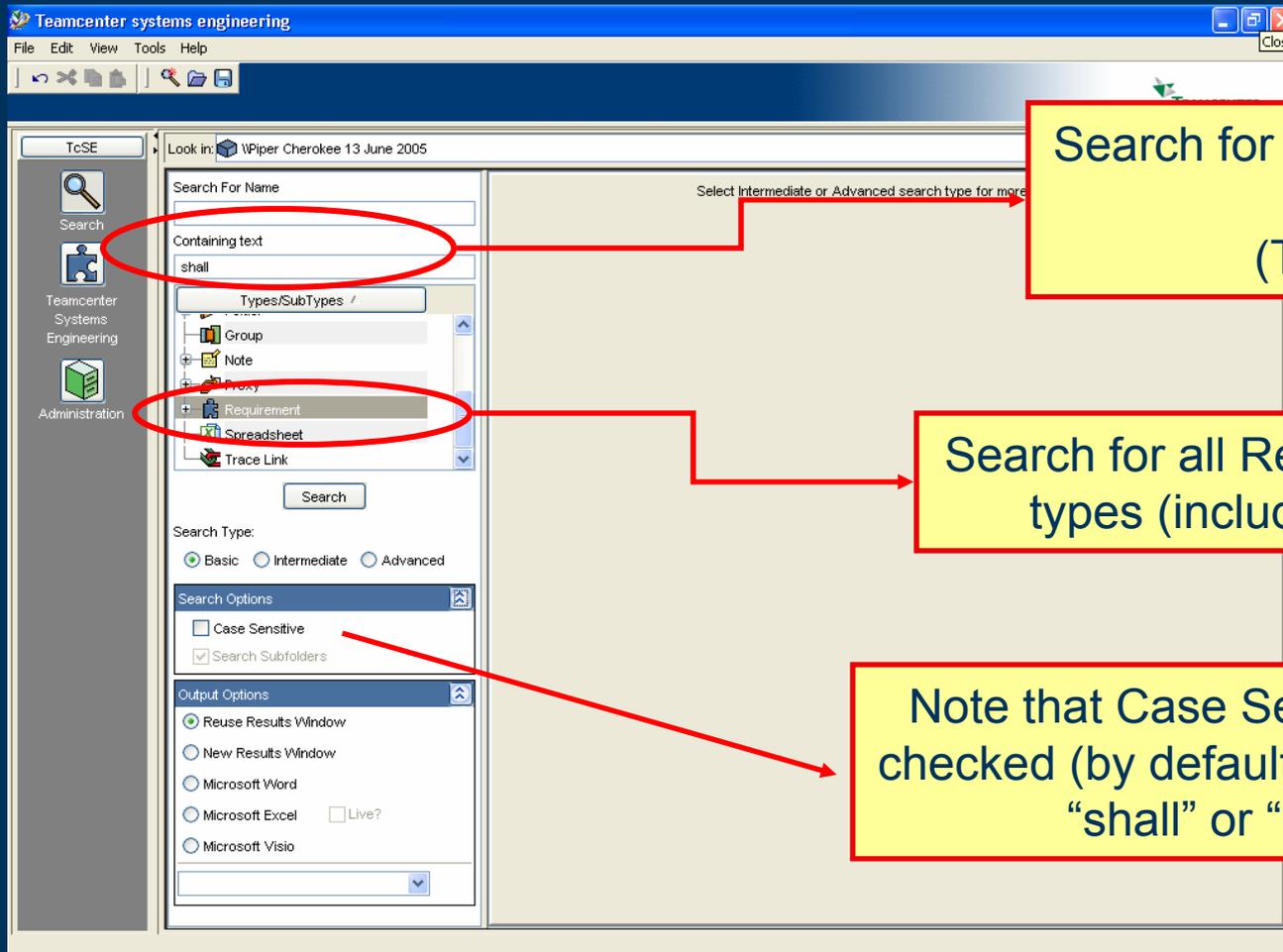
Search for string in object text
(Basic & Intermediate)

Limit search to one or more
types/subtypes



Basic Search - Example

- Find all requirements with “shall” in the text



Search for “shall” text string in the object text (Text property)

Search for all Requirement object types (includes subtypes)

Note that Case Sensitive is not checked (by default), so it will find “shall” or “Shall”



Basic Search - Results

Found Requirement type and Paragraph subtype

Any with "shall" in the text

Folders	Number	ROIN	Subtype	Text
Fuselage	2.1	0041	Paragraph	The fuselage <u>shall</u> consist of a floor assembly ...
Front-end Assembly	2.1.1	0042	Paragraph	The front-end assembly <u>shall</u> include the engine...
Cabin Super-Structure	2.1.2	0043	Paragraph	The cabin super-structure <u>shall</u> include the pilot...
Wings	2.2	0045	Paragraph	Wing construction <u>shall</u> be conventional consist...
Wing-Tip Fuel Tanks	2.2.1	0046	Paragraph	Fuel tanks <u>shall</u> be fitted on each end of the wi...
Landing Gear	2.2.2	0047	Paragraph	Landing gear assemblies <u>shall</u> be fitted under th...
Assembling the Floor	3.1	0050	Paragraph	The press-formed aluminum components of the ...
Assembling the Fuselage	3.2	0051	Paragraph	The fuselage <u>shall</u> consist of the front-end ass...
Assembling the Wings	3.4	0053	Paragraph	Wings <u>shall</u> be assembled concurrently in a sep...
The Wing Assembly	3.4.1	0054	Paragraph	The wing <u>shall</u> consist of an extruded I-beam s...
Fuel System	3.4.2	0055	Paragraph	Fuel bladders and fuel lines will be installed in e...
Fuselage	2.1	0060	Requirement	The fuselage <u>shall</u> consist of a floor assembly ...
Front-end Assembly	2.1.1	0061	Requirement	The front-end assembly <u>shall</u> include the engine...
Cabin Super-Structure	2.1.2	0062	Requirement	The cabin super-structure <u>shall</u> include the pilot...
Wings	2.2	0064	Requirement	Wing construction <u>shall</u> be conventional consist...
Wing-Tip Fuel Tanks	2.2.1	0065	Requirement	Fuel tanks <u>shall</u> be fitted on each end of the wi...
Landing Gear	2.2.2	0066	Requirement	Landing gear assemblies <u>shall</u> be fitted under th...
Assembling the Floor	3.1	0069	Requirement	The press-formed aluminum components of the ...
Assembling the Fuselage	3.2	0070	Requirement	The fuselage <u>shall</u> consist of the front-end ass...
Assembling the Wings	3.4	0072	Requirement	Wings <u>shall</u> be assembled concurrently in a sep...
The Wing Assembly	3.4.1	0073	Requirement	The wing <u>shall</u> consist of an extruded I-beam s...



Intermediate Search

- ▶ Intermediate Search includes all options for Basic Search + search for additional object property values
 - ▶ Additional properties beyond Name and Text
 - ▶ One or more properties/values can be searched



Intermediate Search

The screenshot shows the Teamcenter systems engineering interface. The main window displays a search configuration for a project named "WPiper Cherokee 13 June 2005". The search type is set to "Intermediate". The search criteria are defined as "Subtype = Manufacturing Requirement". The available criteria list includes "Subtype" and "Text".

All Properties for this project

Specify criteria for Property selected

Note that the available criteria changes depending on the type of property (choice, date, numeric, text)

Search For Name

Containing text

shall

Types/SubTypes

- Group
- Note
- Proxy
- Requirement
- Spreadsheet
- Trace Link

Select Properties

- Approval Status
- Assembly Facility
- Assigned To
- Attachment Count
- Baseline
- Change Time
- Change User
- Complying Objects
- Complying Objects Count
- Create Time
- Create User
- Criticality
- Date Deleted
- Defining Objects
- Defining Objects Count
- Full Name
- Instance Security Profile
- Launcher URL
- Lead Time
- Member Count
- Name
- Number
- Original Location
- Owner
- Path
- Project
- Requirement Status
- Reserved By
- Risk Cost
- Risk Mitigation Date
- Risk Mitigation Strategy
- Risk Priority
- ROIN
- Security Profile
- Source Filename
- Source Paragraph
- State Date
- Subtype
- Text

Specify Criteria

Subtype

=

Macro

Manufacturing Requirement

Memorandum

Menu Folder

Menu Item

Node

Delete Row

Edit Search Criteria

Name	Value
Subtype	= Manufacturing Requirement

Search Type:

Basic Intermediate Advanced

Search Options

Case Sensitive

Search Subfolders

Output Options

Reuse Results Window

New Results Window

Microsoft Word

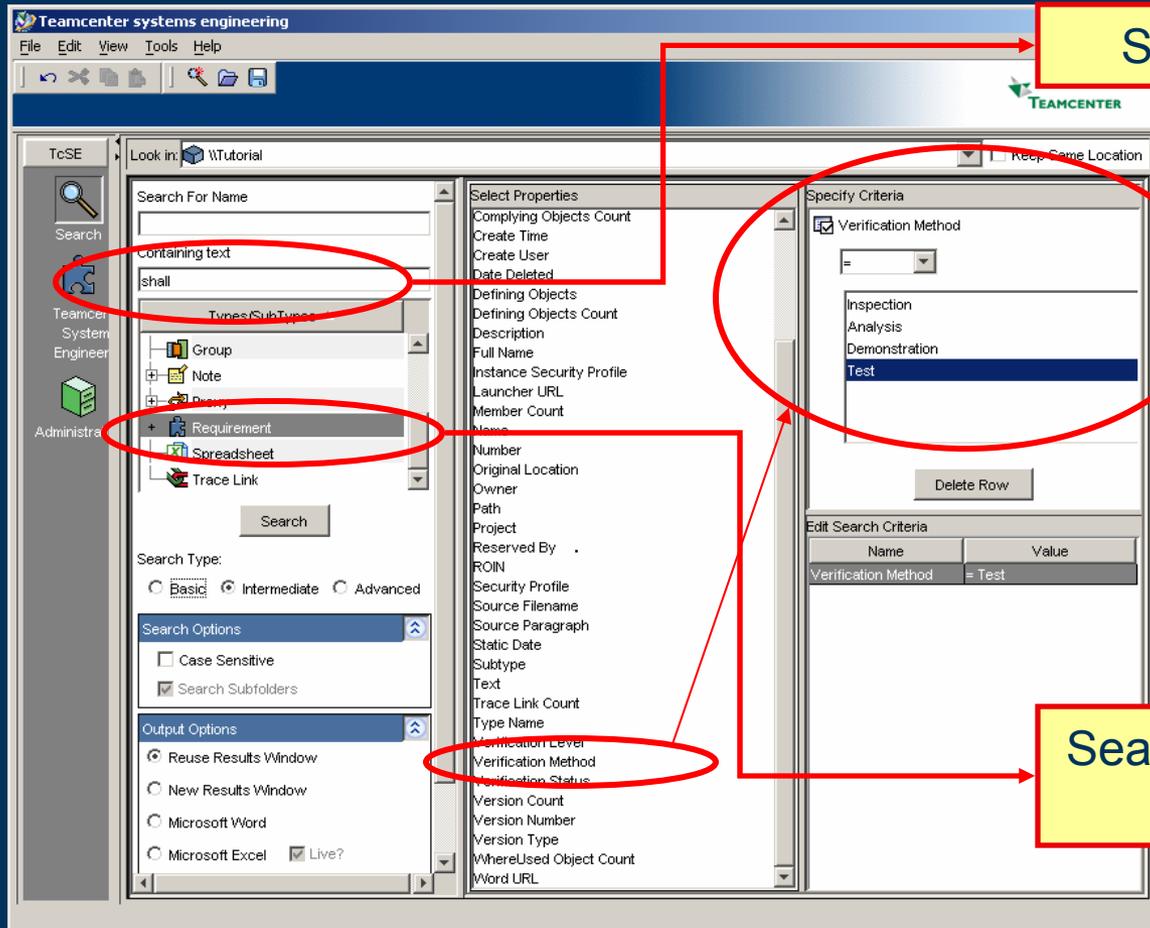
Microsoft Excel Live?

Microsoft Visio



Intermediate Search – Example 1

- ▶ Find all Requirement objects with “shall” in the text which are to be verified via Test.



Search for “shall” in the Text

Verification Method =
Test

Search for all Requirement object
types (includes subtypes)



Intermediate Search – Results for Example 1

Requirement type

Verification Method = Test

Any with
"shall" in the
text

Search Results (13) - 11 Items Found

Folders	Number	ROIN	Subtype	Verification Method	Text
Fuselage	2.1	0060	Requirement	Test	The fuselage <u>shall</u> consist of a floor assembly ...
Front-end Assembly	2.1.1	0061	Requirement	Test	The front-end assembly shall include the engine...
Cabin Super-Structure	2.1.2	0062	Requirement	Test	The cabin super-structure shall include the pilot...
Wings	2.2	0064	Requirement	Test	Wing construction shall be conventional consist...
Wing-Tip Fuel Tanks	2.2.1	0065	Requirement	Test	Fuel tanks shall be fitted on each end of the wi...
Landing Gear	2.2.2	0066	Requirement	Test	Landing gear assemblies <u>shall</u> be fitted under th...
Assembling the Floor	3.1	0069	Requirement	Test	The press-formed aluminum components of the ...
Assembling the Fuselage	3.2	0070	Requirement	Test	The fuselage shall consist of the front-end ass...
Assembling the Wings	3.4	0072	Requirement	Test	Wings shall be assembled concurrently in a sep...
The Wing Assembly	3.4.1	0073	Requirement	Test	The wing shall consist of an extruded I-beam s...
Fuel System	3.4.2	0074	Requirement	Test	Fuel bladders and fuel lines will be installed in e...

11 object(s); 0 selected



Intermediate Search – Example 2

- Find all Requirement objects with “shall” in the text, verified via Test at the System level.

The screenshot shows the Teamcenter systems engineering search interface. The search criteria are set to "shall" and "Verification Level = System". The search type is "Intermediate". The search options include "Search Subfolders" and "Reuse Results Window". The search results table shows "Verification Method = Test" and "Verification Level = System".

Verification Level = System

Note how multiple property search statements are shown here (e.g., Verification Method = Test entered in previous example)



Intermediate Search – Results for Example 2

Verification Method = Test
And
Verification Level = System

Search Results (15) - 7 Items Found

Folders	Number	ROIN	Subtype	Verification Method	Verification Level	Text
Fuselage	2.1	0060	Requirement	Test	System	The fuselage shall consist of
Cabin Super-Structure	2.1.2	0062	Requirement	Test	System	The cabin super-structure shall
Wings	2.2	0064	Requirement	Test	System	Wing construction shall be
Wing-Tip Fuel Tanks	2.2.1	0065	Requirement	Test	System	Fuel tanks shall be fitted on
Assembling the Floor	3.1	0069	Requirement	Test	System	The press-formed aluminum
Assembling the Fuselage	3.2	0070	Requirement	Test	System	The fuselage shall consist of
Assembling the Wings	3.4	0072	Requirement	Test	System	Wings shall be assembled

7 object(s); 0 selected



Advanced Search

- ▶ Create a complex query based on
 - ▶ Types/subtypes, properties, relationships, and more
 - ▶ Tcl activators can be incorporated as well
- ▶ User builds queries directly vs. having the Search module build the queries (Basic and Intermediate)
 - ▶ Note: To see the actual query being built in Basic or Intermediate mode, select the Advanced search type
- ▶ Advanced Search includes additional panes to allow construction of queries



Advanced Search

Basic Search Pane – same but “Search For Name” and “Containing Text” fields are disabled.

Query View Pane – displays the query as it is being constructed.

The screenshot displays the TcSE software interface with three panes highlighted by red boxes:

- Basic Search Pane:** Located on the left, it includes a search bar with "Search For Name" and "Containing text" fields. The "Advanced" search type is selected, and the "Search" button is visible.
- Query View Pane:** Located in the top right, it shows a table of query commands and criteria.
- Query Edit Pane:** Located in the bottom right, it provides options for command and conjunction selection, and a list of properties for specifying criteria.

Commands	Qualifiers	Criteria	
SELECT	Requirement		
WHERE	Text	contains *shall*	AND
WHERE	Subtype	= Manufacturing Requirement	

Query Edit pane details:

- Command: WHERE Conjunction: AND OR Tcl Script
- Specify Criteria: Subtype = [dropdown menu]
- Properties list: Approval Status, Assembly Facility, Assigned To, Attachment Count, Baseline, Change Time, Change User, Complying Objects, Complying Objects Count, Create Time, Create User, Criticality, Date Deleted, Defining Objects, Defining Objects Count, Full Name, Instance Security Profile, Launcher URL, Lead Time, Member Count, Name.

Commands for building the query statements (changes based on query statement selected above)



Query Statements – General Info

- ▶ SELECT statement is the root node for a query, i.e., it is always the first statement.
- ▶ Since each query is a hierarchy, indentation is important
 - ▶ Especially the commands: AND, OR, WHERE, FOR EACH, ADD, REMOVE, SORT
 - ▶ The “Add Indented” button, when selected, causes a list of valid statement types for child nodes to be displayed



Query Statements – General Info

- ▶ For sibling statements, the user interface does not require that they be in a specific order. However, query statements are processed in the following sequence:
 - ▶ SELECT statements
 - ▶ WHERE statements
 - ▶ SORT statements
 - ▶ All other subcommands
- ▶ For multiple SORT statements, the first one indicates the primary sort, the second one indicates the secondary sort, etc.
- ▶ Although Advanced Search limits choices to those options that are valid at a given time, it does not prevent one from creating a query that is illogical or cannot be executed.



Advanced Search – Example 1

- ▶ Find all Requirement objects with “shall” in the text, verified via Test at the System level, with their Test Procedures.

The screenshot shows the Teamcenter systems engineering search interface. The search criteria are defined in the Query View table below:

Commands	Qualifiers	Criteria	
SELECT	Requirement		
WHERE	Text	contains *shall*	AND
WHERE	Verification Method	= Test	AND
WHERE	Verification Level	= System	AND
FOR EACH			
ADD	Complying Objects		
WHERE	Subtype	= Test Procedure	

The Query Edit section shows the command set to WHERE AND AND and the criteria specified as Verification Level = System.

This is the query



Advanced Search – Results for Example 1

Test Procedures linked to requirements

Folders	Number	ROIN	Subtype	Verification Method	Verification Level	Verification Status	Test Description
Fuselage	2.1	0060	Requirement	Test	System	In Progress	The fuselage shall consist of...
Test Procedure 1	1	0077	Test Procedure	Test	System	In Progress	
Cabin Super-Structure	2.1.2	0062	Requirement	Test	System	In Progress	The cabin super-structure shall...
Test Procedure 2	2	0078	Test Procedure	Test	System	In Progress	
Wings	2.2	0064	Requirement	Test	System	Verified	Wing construction shall be...
Test Procedure 3	3	0079	Test Procedure	Test	System	Verified	
Wing-Tip Fuel Tanks	2.2.1	0065	Requirement	Test	System	Verified	Fuel tanks shall be fitted...
Test Procedure 4	4	0080	Test Procedure	Test	System	Verified	
Assembling the Floor	3.1	0069	Requirement	Test	System	In Progress	The press-formed aluminum...
Test Procedure 5	5	0081	Test Procedure	Test	System	In Progress	
Assembling the Fuselage	3.2	0070	Requirement	Test	System	In Progress	The fuselage shall consist...
Test Procedure 6	6	0082	Test Procedure	Test	System	In Progress	
Assembling the Wings	3.4	0072	Requirement	Test	System	Verified	Wings shall be assembled...
Test Procedure 7	7	0083	Test Procedure	Test	System	Verified	

14 object(s); 0 selected



Advanced Search – Example 2

- Find all “Question” notes that are attached to Manufacturing Requirements which contain the word “shall” in them and are assigned to Albert Einstein.

The screenshot shows the Teamcenter systems engineering search interface. The main window is titled "Teamcenter systems engineering" and has a menu bar with "File", "Edit", "View", "Tools", and "Help". The "Look in" path is "W:\Tutorial\Piper Cherokee Aircraft Project\Requirements\Manufacturing Requirements". The search criteria are defined in the "Query View" as follows:

Commands	Qualifiers	Criteria
SELECT	Requirement	
WHERE	Subtype	= Manufacturing Requirement
WHERE	Text	contains *shall*
WHERE	Assigned To	= Albert Einstein
FOR EACH		
ADD	Notes	
WHERE	Subtype	= Question
REMOVE	Requirement	

The "Query Edit" section shows the command "WHERE" selected, with "AND" as the conjunction. The "Specify Criteria" section shows "Subtype" selected with a dropdown menu set to "=". The "Properties" section lists various attributes like "Approval Status", "Assigned To", etc.

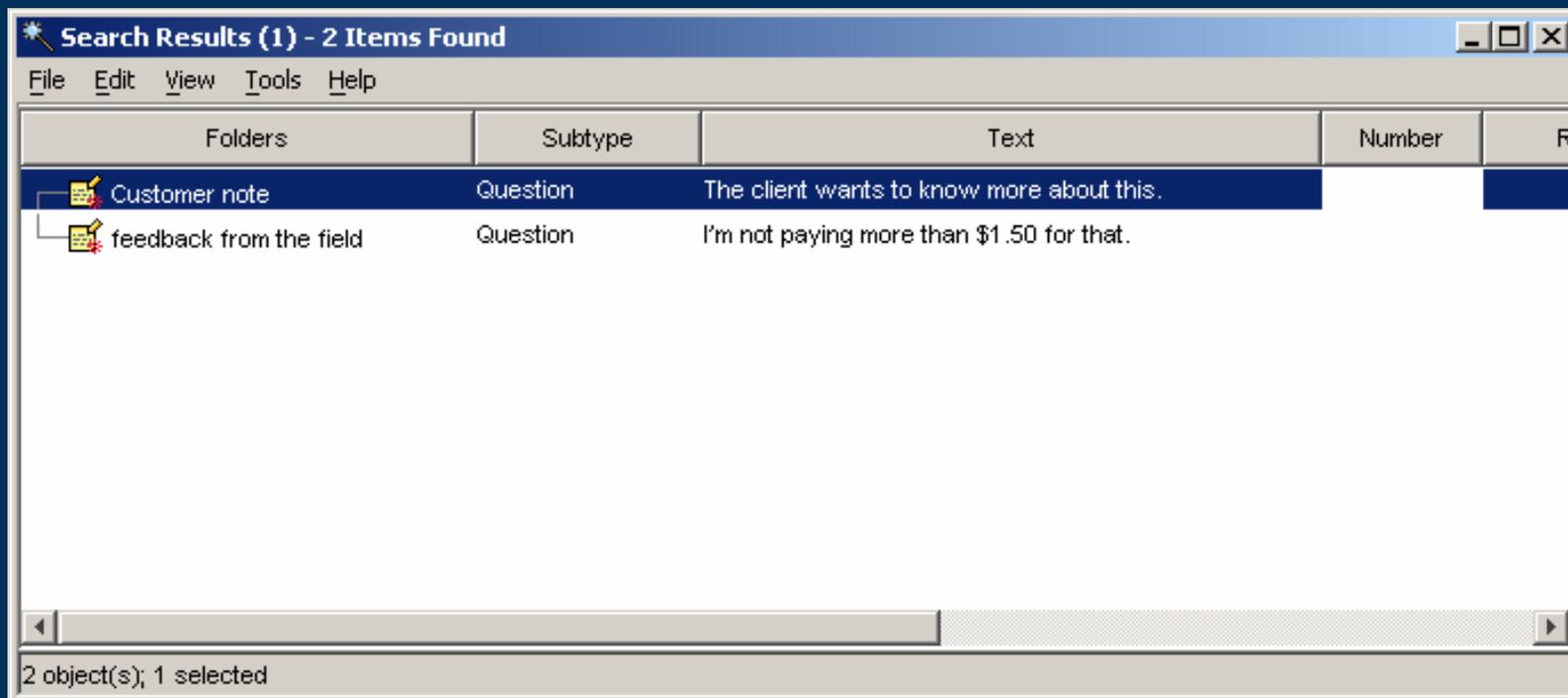
Find the requirements

For each of those requirements, add the notes

Since all we want is the notes, remove the requirement objects from the search results



Advanced Search – Results of Example 2



Folders	Subtype	Text	Number	R
Customer note	Question	The client wants to know more about this.		
feedback from the field	Question	I'm not paying more than \$1.50 for that.		

2 object(s); 1 selected



Report Export Options

- ▶ Native User Interface
 - ▶ Examples so far
 - ▶ Can use predefined Views
- ▶ MS-Word
 - ▶ Use Document Templates
- ▶ MS-Excel
 - ▶ Use MS-Excel Templates
 - ▶ Static export or MS-Excel Live
- ▶ MS-Visio
 - ▶ Use stencils

Report Outputs - Native User Interface

Reuse same Search Results window or create a new one with each search

If desired, select a saved View to define columns in the resulting Search Results window

The screenshot displays the Teamcenter systems engineering Native User Interface. The interface is divided into several sections:

- Search Section:** Includes a search bar with "shall" entered, a tree view of Types/SubTypes (Requirement, Paragraph, Customer Derived Requirement, Derived Requirement, Enterprise Requirement, Industry Requirement), and search options like "Case Sensitive" and "Search Subfolders".
- Query View Section:** Shows a query tree with commands like SELECT, WHERE, FOR EACH, and ADD, along with their respective qualifiers and criteria.
- Query Edit Section:** Features radio buttons for Command (AND, OR, WHERE, FOR EACH, ADD, REMOVE) and a "Specify Criteria" area.
- Output Options Section:** Contains radio buttons for "Reuse Results Window" and "New Results Window", and a dropdown menu for "my view.(tcradm)".

Red circles highlight the "Reuse Results Window" radio button and the "my view.(tcradm)" dropdown menu in the Output Options section.



Things You Can Do From the Search Results

- ▶ For any object selected in the Search Results window, you can:
 - ▶ Add/remove/rearrange property columns
 - ▶ Change the object's properties (in the window if column displayed, or with Edit Properties dialog)
 - ▶ Open (for editing or read-only)
 - ▶ Navigate to the object (Go To Object)
 - ▶ Rename the object
 - ▶ Delete the object
 - ▶ Create trace links
 - ▶ Export to MS-Excel
 - ▶ Export to MS-Word
 - ▶ Copy the object's URL
 - ▶ Send email

The screenshot shows a window titled "Search Results (42) - 15 Items Found" with a menu bar (File, Edit, View, Tools, Help) and a table of search results. The table has columns for Folders, Number, ROIN, Subtype, and an unlabeled column. The results are organized in a tree view under folders like Fuselage, Cabin Super-Structure, Wings, Wing-Tip Fuel Tanks, Assembling the Floor, Assembling the Fuselage, Assembling the Wings, and Mfg Rqmt 1. Each folder contains one or more "Test Procedure" objects. The status bar at the bottom indicates "14 object(s); 0 selected".

Folders	Number	ROIN	Subtype	
Fuselage	2.1	0060	Requirement	The fus
Test Procedure 1	1	0077	Test Procedure	
Cabin Super-Structure	2.1.2	0062	Requirement	The cab
Test Procedure 2	2	0078	Test Procedure	
Wings	2.2	0064	Requirement	Wing cc
Test Procedure 3	3	0079	Test Procedure	
Wing-Tip Fuel Tanks	2.2.1	0065	Requirement	Fuel tan
Test Procedure 4	4	0080	Test Procedure	
Assembling the Floor	3.1	0069	Requirement	The pre:
Test Procedure 5	5	0081	Test Procedure	
Assembling the Fuselage	3.2	0070	Requirement	The fus
Test Procedure 6	6	0082	Test Procedure	
Assembling the Wings	3.4	0072	Requirement	Wings s
Test Procedure 7	7	0083	Test Procedure	
Mfg Rqmt 1	1	0084	Manufacturing Re...	We sha

Several of these you can also do with multiple objects selected at the same time



Report Outputs – MS Word

Select MS-Word as the Output Option

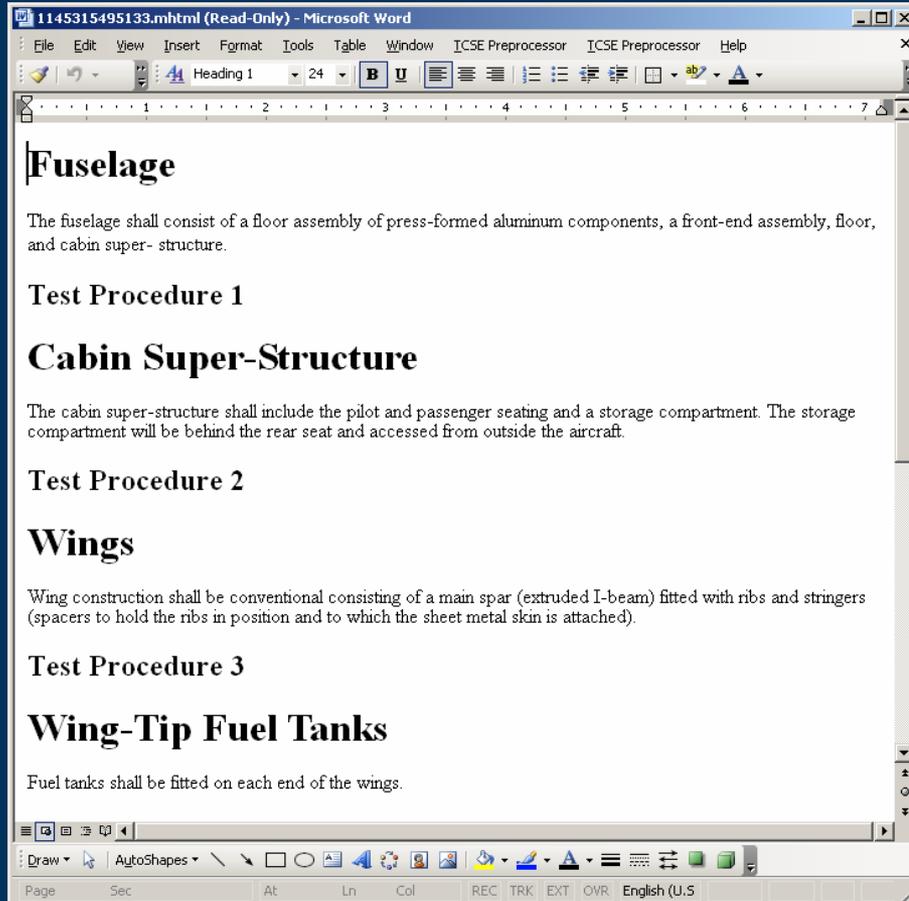
Select the desired Document Template

The screenshot shows the Teamcenter systems engineering search interface. The search criteria are set to 'shall' and the search type is 'Advanced'. The search options include 'Case Sensitive' (unchecked) and 'Search Subfolders' (checked). The output options include 'Reuse Results Window' (unchecked), 'New Results Window' (unchecked), 'Microsoft Word' (checked), 'Microsoft Excel' (unchecked), and 'Microsoft Word' (unchecked). The 'Default Document Template' dropdown is highlighted with a red circle. The 'Query View' table shows the search results:

Commands	Qualifiers	Criteria	
-SELECT	Requirement		
-WHERE	Text	contains *shall*	AND
-WHERE	Verification Method	= Test	AND
-WHERE	Verification Level	= System	
-FOR EACH			
-ADD	Complying Objects		
-WHERE	Subtype	= Test Procedure	



Report Outputs – MS Word



- ▶ Document format is completely tailorable, based on:
 - ▶ Document Template
 - ▶ Style Sheet
 - ▶ Object Templates
- ▶ 1 Document Template
- ▶ 1 Style Sheet per Document Template
- ▶ Multiple Object Templates, mapped to object types/subtypes in the Document Template
- ▶ MS-Word output is a static snapshot



Report Outputs to MS-Excel

Select MS-Excel as the Output Option, including whether or not you want it to be an MS-Excel Live report

Select the desired MS-Excel Template

The screenshot shows the Teamcenter systems engineering interface. The left sidebar contains navigation icons for Search, Teamcenter System Engineer, and Administration. The main window is titled 'Look in: \Tutorial'. The search area includes a 'Search For Name' field, a 'Containing text' field with 'shall', and a tree view of 'Types/SubTypes' with 'Requirement' selected. Below this are 'Search Type' options (Basic, Intermediate, Advanced) and 'Search Options' (Case Sensitive, Search Subfolders). The 'Output Options' section shows 'Microsoft Excel' selected with a 'Live?' checkbox checked. A dropdown menu at the bottom shows 'Default Excel Template' selected. The right pane displays a 'Query View' table with columns for Commands, Qualifiers, and Criteria. The table contains a query structure for finding requirements with specific verification methods and levels. Below the table is a 'Query Edit' section with radio buttons for logical operators and a 'Specify Criteria' area.

Commands	Qualifiers	Criteria	
-SELECT	Requirement		
-WHERE	Text	contains *shall*	AND
-WHERE	Verification Method	= Test	AND
-WHERE	Verification Level	= System	
-FOR EACH			
-ADD	Complying Objects		
-WHERE	Subtype	= Test Procedure	



Report Outputs to MS-Excel

Folder	Attachments	Links	Number	ROIN	Type	Create User	Create
Fuselage	0	1	2.1	0060	Requirement	tcradm	2/28/05 1
Test Procedure 1 Cabin Super-Structure	0	1	1	0077	Requirement	tcradm	4/17/06 2
Test Procedure 2 Wings	0	1	2.2	0078	Requirement	tcradm	4/17/06 2
Test Procedure 3 Wing-Tip Fuel Tanks	0	1	2.2.1	0064	Requirement	tcradm	2/28/05 1
Test Procedure 4 Assembling the Floor	0	1	4	0079	Requirement	tcradm	4/17/06 2
Test Procedure 5 Assembling the Fuselage	0	1	3.1	0065	Requirement	tcradm	2/28/05 1
Test Procedure 6 Assembling the Wings	0	1	3.2	0080	Requirement	tcradm	4/17/06 2
Test Procedure 7 Mfg Rqmt 1	0	1	3.4	0081	Requirement	tcradm	2/28/05 1
	0	1	7	0072	Requirement	tcradm	4/17/06 2
	2	0	1	0083	Requirement	tcradm	4/17/06 2
				0084	Requirement	tcradm	4/17/06 3

This indicates this is an MS-Excel Live report. Cells in this spreadsheet are directly connected to the TcSE database.

- ▶ Spreadsheet format is completely tailorable, based on MS-Excel Template
- ▶ MS-Excel Template can include
 - ▶ Rules based on levels, relationships, subtypes
 - ▶ Which properties are displayed
 - ▶ Formatting
 - ▶ Additional calculations based on reported data
 - ▶ Sorting and filtering
 - ▶ Etc.



MS-Excel Template Example

Microsoft Excel - 1.0.4989_Spreadsheet.mhtml

File Edit View Insert Format Tools Data Window Help

Type a question for help

A3 <start>

Folder	Attachments	Links	Number	ROIN	Type	Create User	Create Time
<start>	{%Attachment Count}	{%Trace Link Count}	{%Number}	{%ROIN}	{%Type Name}	{%Create User}	{%Create Time}
<end>							

<rule>	Level	Relationship	Subtype
<rule>	{%L-1}	{%R-Complying}	{%S-Requirement}

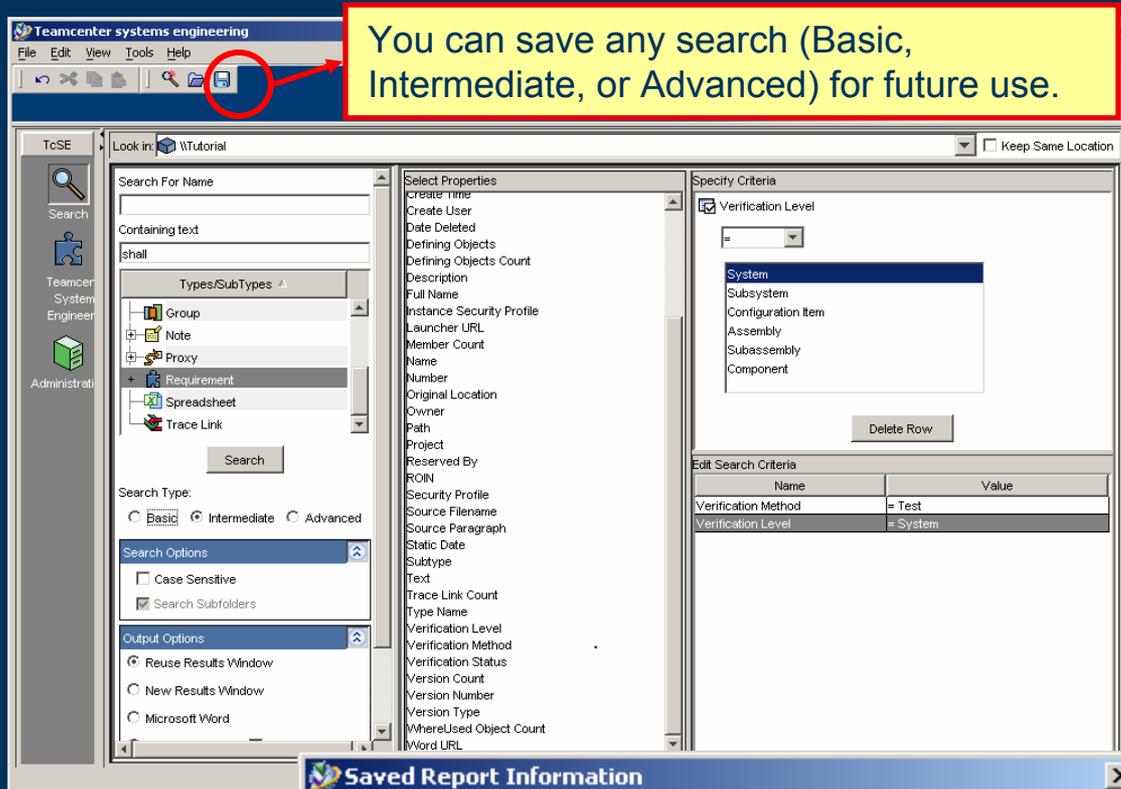
Define the properties to include in each cell, based on rule to the right.

There can be multiple rules. Each can be based on one or more of the following:

- Level (of the object in the native UI output)
- Relationship (complying, defining, etc.)
- Subtype of the object



Saving Searches



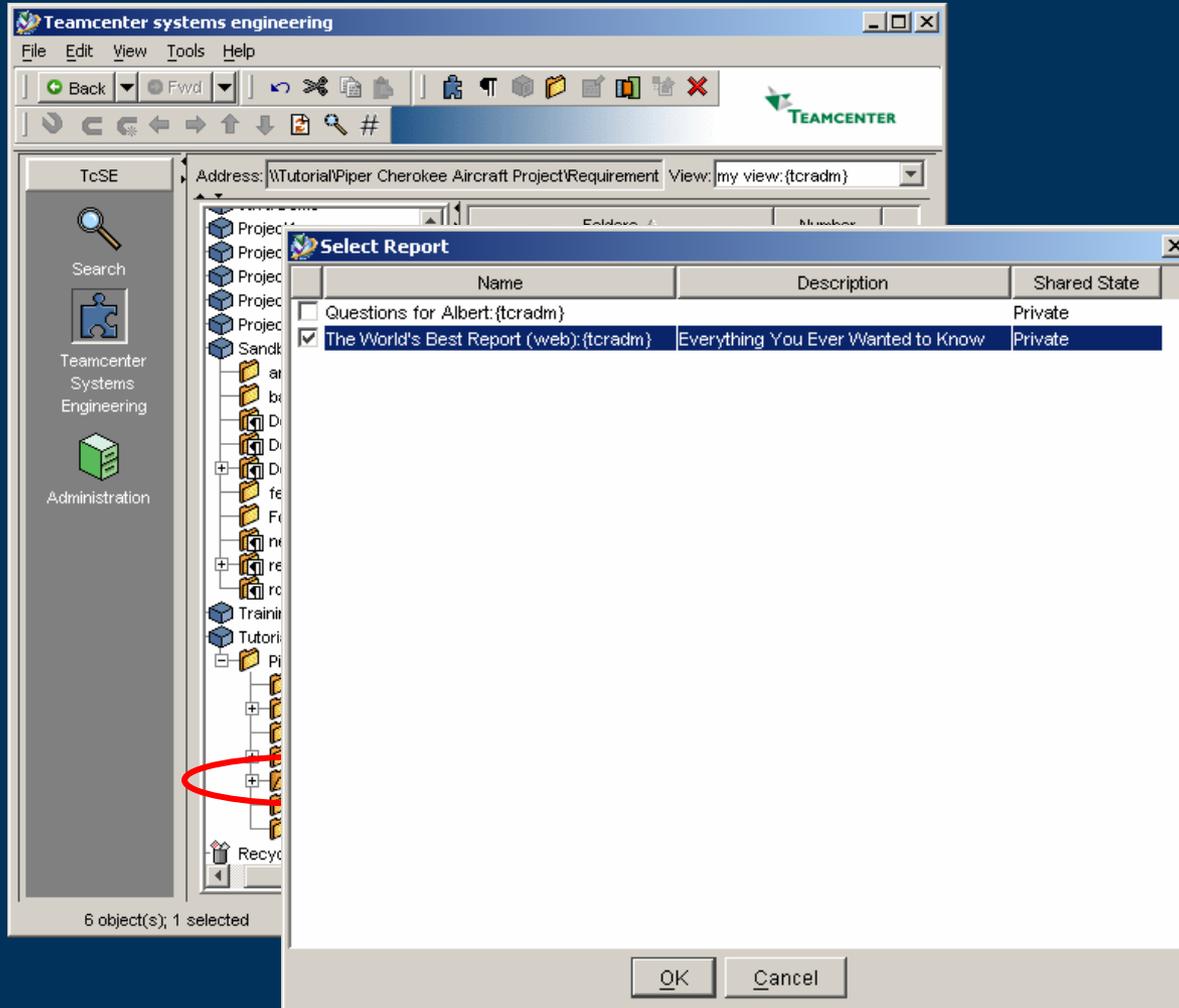
You can save any search (Basic, Intermediate, or Advanced) for future use.

- ▶ If you want to use it again, save it
- ▶ Saved search includes the Output format (MS-Word, MS-Excel, etc.)
- ▶ Initial save defaults to private (only the creator can see and use it)
 - ▶ Project Admin can make it public for others to use
- ▶ Saved reports can also be run from a URL
 - ▶ Report's URL in Admin module
 - ▶ If you want to run the report from a URL, select this to ensure report always starts at the same place for consistent results





Running Saved Searches



- ▶ Select location where the report should start
 - ▶ Reports are generally relative to their starting point, so select the appropriate folder/node in the Navigation Pane
- ▶ Tools > Run Report
- ▶ Select report from list
- ▶ OK to run the report



Summary

- ▶ Different Types of Search
 - ▶ Basic, Intermediate, Advanced
- ▶ Export Options
 - ▶ Native UI, MS-Word, MS-Excel
- ▶ Saving Searches
 - ▶ Includes the query as well as the output format
- ▶ Running Saved Searches
 - ▶ Private vs. public
- ▶ Small taste of TcSE Search Module capability
 - ▶ Best way to learn is practice (especially Advanced Search)



Questions???

Thank You

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