TEAMCENTER MOBILITY
for Reporting and Analytics

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Reports in Teamcenter Mobility

Teamcenter reporting and analytics (Reporting and Analytics) reports can be viewed in Teamcenter Mobility 3.0. To facilitate this, Reporting and Analytics must to be installed and running. To ensure that Reporting and Analytics and Teamcenter Mobility user authentication works seamlessly, either one of the following conditions must be true:

- Reporting and Analytics users must have the same user ID and password as Teamcenter.

- You must import Teamcenter users in Reporting and Analytics and provide the authentication for these users as Teamcenter instead of Reporting and Analytics. For more information, see the TcRA Admin Console online help.
Reports

The following two options appear when the user taps the Reports button in Teamcenter Mobility:

- Scheduled Snapshots
- Summary Reports

The dashboard appears automatically when the Reports tab is opened.
Dashboard

The dashboard is a consolidation of your metrics, KPIs and reports on a single page. Metrics, KPIs and reports must be configured from the Reporting and Analytics BuildNPlay application to make them available on the dashboard. Metrics, KPIs and reports are subscription based. You can subscribe to the configured metrics, KPIs or reports as follows:

1. Navigate to the Reports tab. If a report is already opened, tap the back button to return to the root of the tab.

2. To add some subscriptions to this dashboard, tap the **Add Subscription** button next to the tabs and the **Add Subscriptions** dialog box appears.

3. Enter your subscription search criteria on this page and then tap **Search Subscriptions**. You can see a list of the subscriptions as per your search criteria. You can also directly tap the **Results** tab to view all the available subscriptions.
4. Select the subscriptions that you want to add and then tap the Add to Dashboard button.

NOTE: You can add only those subscriptions for which you have permission.

5. The subscriptions that you select are now added to your dashboard, and the following message appears:

Once you add the required subscriptions to your dashboard, you can view them by tapping the tabs – Metrics, KPI and Report.

NOTE: You can create a subscription only through the Reporting and Analytics BuildNPlay application.
**Metrics**

Metrics are a special type of summary report that show trends, variance, counts and so forth. It also has detailed reports associated with it that can be shown by tapping the specific metrics link.

On this tab, you can see a list of all metrics that have been added to your dashboard. For each of the metrics, you can see the **Trend** (if available), **Actual, Target, Variance, N Count, As Of** and **Status** values.

**Trend, Actual, Target, Variance** and **N Count** are the parameters dependent on the report on which the subscription is created.

- **Trend**
  Metrics are reports scheduled at a pre-defined frequency. Based on a user-defined column in the report, the trend is shown upwards, downwards or neutral as per its value in the previous run of the report.

- **Actual**
  User-defined column on the report, for example, the total objects released in a life cycle in a given time frame.

- **Target**
  User-defined value for example, the target value for the number of objects to be released in a given time frame.

- **Variance**
  Defined as target-actual and can be color-coded based on certain rules/conditions.

- **N Count**
  User-defined column in the report. It specifies the total for a certain metric, for example, the total number of objects that are available, that is, the total of released and nonreleased objects.

- **As of**
  Last updated date and timestamp for the subscriptions. If the subscription is not executed, this field is blank. It is also blank if the last execution of the subscription fails.

- **Status**
  Status of whether the subscription execution completed. If the subscription is not yet executed, this field is blank. If the last execution fails, the status is shown as **Failed**. If the subscription is currently executing, the status is shown as **Working**. After the successful execution of the subscription the status is shown as **Complete**.
Tap the given link on the metrics to load the detailed report associated with the particular metric. The changes done to the metric, for example, changing the heading or sorting cannot be saved on the dashboard. Such changes must be done in the Reporting and Analytics BuildNPlay application.

On each tab, you can see three buttons: **Update**, **Remove** and **Refresh**.
Update
Facilitates the user to update or rerun the metrics. Select a metric on the dashboard to update and tap **Update**. The following message appears.

```
Selected subscriptions will be updated shortly.
OK
```

**NOTE:** You can update only those metrics that are owned by you.

Remove
Select one or multiple metrics to remove from the dashboard and tap the **Remove** button. The following message appears.

```
Selected subscriptions are removed from your dashboard successfully.
OK
```

Refresh Page
Tap **Refresh Page** to refresh the dashboard. This refreshes the page to fetch the latest values of the metrics.
**KPI**

KPIs (key performance indicators) help you analyze the performance of the business depending on some key factors. You can track your own KPIs, which can be shown in the form of charts and reports.

On this tab, you can see all the KPIs that you add to your dashboard. The initial view of the KPIs shows a static screenshot of your report.
Tap the given link to do an analysis on the KPI. You can refine your KPI for analysis, for example, sorting columns, drilling down into charts, and so on. You cannot save any of the changes you make to the KPI on the dashboard.

There are three buttons on this tab: **Update**, **Remove** and **Refresh Page**.
**Update**
Facilitates the user to update or rerun the KPI. Select a KPI on the dashboard to update and tap **Update**. The following message appears.

![Update Message]

NOTE: You can update only those KPIs that are owned by you.

**Remove**
Select a KPI to remove from the dashboard and tap **Remove**. The following message appears.

![Remove Message]

**Refresh Page**
Tap **Refresh Page** to refresh the dashboard. This refreshes the page to fetch the latest values of the KPIs.
Reports

Reports are links to reports or snapshots created by a periodic schedule on reports. This tab displays all the reports that you add to your dashboard.

This tab has three columns:

- **Subscription Name**
  Displays the name of the subscription.

- **As of**
  Displays the date and timestamp for only those subscriptions that are scheduled. This can also be blank if the last execution of the subscription fails.

- **Status**
  Indicates the completion for only those subscriptions that are scheduled. If the subscription is not yet executed, this field is blank. If the last execution fails, the status is shown as **Failed**. If the subscription is currently executing, the status is shown as **Working**. After the successful execution of the subscription, the status is shown as **Complete**.

Tap the given link to do an analysis on the report.
You cannot save any of the changes you make to the report on the dashboard.
Update
Select a metric on the dashboard to update and tap **Update**. You can update only those subscriptions for which **Scheduling Option** is set. The following message appears.

NOTE: You can update only those metrics that are owned by you.
**Remove**
Select one or multiple metrics to remove from the dashboard and tap the **Remove** button. The following message appears.

![Selected subscriptions are removed from your dashboard successfully.](image)

**Refresh Page**
Tap **Refresh Page** to refresh the dashboard. This refreshes the page to fetch the latest values of the metrics.
Scheduled Snapshots

You can see all the snapshots of the reports that are scheduled from either Teamcenter Mobility or from Reporting and Analytics where the option to view the scheduled snapshots from Teamcenter Mobility is enabled.

NOTE: You can see only those snapshots that are created by scheduling a Reporting and Analytics report. While scheduling the report, you must set the option to generate the Teamcenter Mobility URL to see the snapshot in this list.

Tap the snapshot in the left pane to load the snapshot in the right pane.
Summary Report

1. Tap **Summary Report** and the following window appears.

   ![Summary Report window](image1)

   NOTE: These are the categories in which the reports are saved in the Reporting and Analytics BuildNPlay application. All categories appear in a flat structure irrespective of their hierarchy.

   You can see a list of categories on the left pane.

2. Tap the category to see a list of summary reports available under this category.

   ![Summary Report window](image2)
3. Select the report you want to run or schedule.

![Selecting a report](image1.png)

**NOTE:** You can view Run and Schedule options only when the summary report is a template or a redefinable template. If the summary report is a snapshot, the report is loaded directly when you tap the report name in the left pane.

4. Tap the **Run** button and the report is loaded.

![Run button](image2.png)
5. If the report is a redefinable template, you see a page from which you can specify filters as shown.

6. You can provide the values for the filter you want to add.

- In the Filters section, you can see the list of filters that you identified in the Reporting and Analytics BuildNPlay application. You can now configure these filters in this window. Select an appropriate value in the Operator(s) field and then tap next to the corresponding Value(s) field.

The Lookup window appears.

Select a value from the list and then tap Select to return to the Report Data tab.

NOTE: If the report is based on a saved query object (for example, SQ__General__) from Teamcenter, only the == operator is supported as a filter for these types of filters. Select the == operator while running these reports.

- To reset a filter, tap next to the corresponding filter. If you define the filter as Mandatory, it appears in red with an asterisk (*). If you mark the filter as One of these, it appears in red with a hash (#).

NOTE: To proceed, you must enter values for the filters marked as Mandatory or One of these.

- If a particular filter has a custom filter user interface selected for it, you see this button. Tap this button to open the custom filter user interface.
• In the sample custom UI, if you tap **Set**, all values are concatenated to form a final string. This is set as the value of the filter on the **Reports** tab.

7. Tap the **Lookup** button to set the values for the filters.
• Select the values from multiple levels and tap **Done**.

8. Tap the **Show Report** button at the bottom of the page to see the report.

9. Tap **Schedule**.
   The scheduling options dialog box appears:

   **NOTE:** **Send Snapshot URL** is selected by default. Snapshot URL is a Reporting and Analytics link, which when tapped displays the scheduled snapshot in Reporting and Analytics. You cannot clear this check box. To view the snapshot created through this scheduled task in Teamcenter Mobility, select the **TC Mobility** check box.
10. The snapshot created appears under the **Scheduled Snapshots** option in Teamcenter Mobility. The snapshots scheduled for the summary report also appear under the **Scheduled Snapshots**.

11. If the report is a redefinable template, tap the **Schedule** button and the following dialog box appears.

You can provide the values for the filter you want to add.

- The **Filters** section displays a list of filters that you identified in the Reporting and Analytics BuildNPlay application. You can now configure these filters on this window.

  Select an appropriate value in the **Operator(s)** field and then tap against the corresponding **Value(s)** field.

  The **Lookup** dialog box appears.
Select a value from the list and then tap Select to return to the Report Data tab.

NOTE: If the report is based on a saved query object (for example, SQ_General) from Teamcenter, only the == operator is supported as a filter on these types of filters. Select the == operator while running these reports.

• To reset a filter, tap next to the corresponding filter. If you define the filter as Mandatory, it appears in red with an asterisk (*). If you mark the filter as One of these, it appears in red with a hash (#).

NOTE: To proceed, you must enter values for the filters marked as Mandatory or One of these.

• If a particular filter has a custom filter user interface selected for it, you see this button . Tap this button to open the custom filter user interface.

In the sample custom UI, if you tap Set, all values are concatenated to form a final string. This is set as the value of the filter on the Reports tab.

12. Tap Schedule Report to display the scheduling options page.

13. Tap Snapshot Permissions to select users who are allowed to access the snapshot created by this schedule. An e-mail notification is sent to all the selected users once the snapshot is generated.
14. Use the ⤻ ⤼ buttons to navigate to the previous or next page.

NOTE: You can access to the generated snapshot only if you have not set any permission.

15. Select BuildNPlay under the Send Snapshot URL to generate the Reporting and Analytics BuildNPlay application URL for viewing the snapshot in the Reporting and Analytics BuildNPlay application. Users receive an email with a URL, which when tapped, launches the Reporting and Analytics BuildNPlay application and opens the snapshot generated by this schedule.
16. If you select the **Portal** check box, tap the ![button](image) button and select the portals from the list.

![Image](image)

**NOTE:** You can select multiple portals. The snapshot URL for each portal is generated and sent in the mail. Users can specify to open the snapshot in a selected portal.

17. You can enter the maximum number of minutes to generate a snapshot in the **Abort Report after x minutes** box. The system does not generate the snapshot after the specified minutes expire. An e-mail notification is sent to the user who has scheduled the snapshot or to users who were to receive the snapshot.

**NOTE:** Enter a numeric value instead of x.

18. Tap **Schedule Report** to schedule the report.
In-Context Item Reports

Item reports are reports that run by selecting a particular object (class) in Teamcenter. These are the reports that are deployed to Teamcenter through Reporting and Analytics. For more information about how to deploy item reports, see the Reporting and Analytics online help.

1. Tap the button and the following pane appear.

![Item report pane]

NOTE: If you select an item revision, reports appear under Revision Reports and Revision Scheduled Snapshots.

2. Item reports are divided into Item Report and Item Scheduled Snapshots.
Item Reports

You can either run or schedule these reports.

Run a Report

1. Tap the **Run** button and the report is loaded.

2. Tap the **</>** button to maximize the report.
Schedule a Report

1. Tap the **Schedule** and the following dialog box appears.

   **NOTE:** *Send Snapshot URL* is selected by default. You cannot clear this check box. To view the snapshot created through this scheduled task in Teamcenter Mobility, you must select the **TC Mobility** check box.
2. The snapshot created appears under the **Scheduled Snapshots** option in Teamcenter Mobility. The snapshots scheduled for this item also appear under **Revision Scheduled Snapshots** for this item as shown.

3. Tap **Snapshot Permissions** to select the users who are allowed access the snapshot created by this schedule. An e-mail notification is sent to all selected users once the snapshot is generated. These users also receive the e-mail with URLs to the snapshot.
4. Use the "<<< >>>" buttons to navigate to the previous and next page.

5. Select BuildNPlay on the Send Snapshot URL to generate the Reporting and Analytics BuildNPlay application URL for viewing the snapshot in the Reporting and Analytics BuildNPlay application. Users receive an e-mail with a URL, which when tapped launches the Reporting and Analytics BuildNPlay application and opens the snapshot generated by this schedule.

NOTE: If you do not set the permissions, you only have access to the generated snapshot.
6. If you select the **Portal** check box, tap on the ![button](image) button and select the portals from the list.

![Image](image)

7. You can enter the maximum number of minutes to generate a snapshot in the **Abort Report after x minutes** box. The system does not generate the snapshot after the specified minutes expire. An e-mail notification is sent to the user who has scheduled the snapshot or to users who were to receive the snapshot.

**NOTE:** Enter a numeric value instead of \( x \).

8. Tap the **Schedule Report** button to schedule the report.
Item Schedule Snapshot

You can see all the snapshots that are created for this item under Revision Schedule Snapshot.

You can choose a snapshot from the revision scheduled snapshots, and this snapshot is loaded.
Report Actions

Refining a Report

Certain refine options are available on the report. If you use the refine options and the report has changed, you cannot save this using Teamcenter Mobility.

Refine Actions on the Cube Grid

Tap the button above the cube grid to refine the cube grid. The following window appears.
The refine options available are:

- **Search**
  Tap **Search** to search a value in the cube grid. Tap **Search** and the **Search** pane appears:

1. Enter a value that you want to search for in the **Value** field.

2. Tap the **Column(s)** box to display the list of available columns as shown in the following figure. You can select one or more columns from the **Column(s)** list in which you want to search the value.
3. Tap Done.

4. To search for the value exactly as you entered, select the **Exact** check box.

5. To match the case of the value exactly the same way as you entered, select the **Match Case** check box.

6. Select either **Up** or **Down** to define the search direction.

7. Tap **Search**.

- **Reset All Filter Values**
  Tap **Reset All Filter Values** to reset all filter values applied from the default filter value element of the cube grid.

- **Enable Filter Values**
  Tap **Enable Filter Values** to enable the **Auto-Filtering** option on the cube grid.

- **Apply Filter Values on Levels**
  Tap **Apply Filter Values on Levels** to change the levels for which you want to apply filter values. If you do not specify any level selection for the default filter value element, the filter values are applied on the leaf level.

**NOTE:** The **Apply Filter Values on Levels** option is displayed only on a hierarchical report.
Select the levels for which you want to apply the filter and tap **Submit**.

- **Sort Columns**
  Tap **Sort Columns** to apply sorting on multiple columns. You can also specify the order in which the sorting is applied on multiple columns.
1. Tap the box under **Columns** to open the list of columns. You can select one or multiple columns on which you want to apply the sorting. Select the columns that you want to sort in a particular order from the **Columns** list.

2. Tap **Done**.

3. Tap ▶️ to add the columns to the **Sorting Information** list.
4. You can sort the order of the columns in the **Sorting Information** list based on the **Asc** (ascending) and **Desc** (descending) parameters. The list of selected columns appears under Column Names.

5. Tap **Submit** to apply the sorting.

   **NOTE:** If you want to sort a single column, tap the column header. If the column is unsorted, it is sorted in ascending order. If the column is already sorted, it toggles the sorting.

- **Reset Sorting**
  Tap Reset to reset the way you sort your result.

- **Show Column(s)**
  Tap **Show Column(s)** to see the measure/dimensions columns that are hidden.

Select the check box for each desired column name and tap **Show** to make the columns visible in the report.
Refine Actions on Dimension
Tap the 📊 button to refine the dimension and the following window appears.

The refine options available are:

- **Change Edge**
  Tap **Change Edge** to change the edge of the dimension. After changing the edge, the row-edge dimension is shown on the column edge in the report and vice-versa.

- **Hide**
  Tap **Hide** to hide the selected dimension column from the report.
• **Initial View Level**

Tap **Initial View Level** to change the hierarchy level of the dimension at which you are viewing the data. A sub-menu with all levels of the dimension appears. Select the appropriate level.
• **Search**  
  Tap **Search** to search the dimension.

1. Enter a value that you want to search for in the **Value** field.

2. The dimension column appears as selected; however, you can change the column selection in the column list.

3. To search for the value exactly as you entered, select the **Exact** check box.

4. To match the case of the value exactly the same way as you entered, select the **Match Case** check box.

5. Select either **Up** or **Down** to define the search direction.

6. Tap **Search**.

**NOTE:** The **Initial View Level** option is displayed only if it is a hierarchical report.
Refine Actions on Measure
Tap the button to refine the measure and the following window appears.

- **Hide**
  Hides this measure from the report.

- **Move Measure**
  Moves a measure to a new location either by using the Before/After or To options.
Select **Before** or **After** and select a measure from the list and tap **Set**. The existing measure moves to the new location you defined.

or

Select **To** and select a number from the **Sequence** list and tap **Set**. The existing measure moves to the new location you defined.

- **Roll Up**
  To change the rollup type of the measure, select one of the rollup types shown on the sub-menu. All the applicable rollup types for the selected measure column appear.
- **No Rollup**  
The parent retains its value. If no value is available, a blank is shown for the parent node.

- **No. of Children**  
The measure value of the parent node is the number of immediate children nodes.

- **Leaf Level Count**  
The measure value of the parent node is the number of non-null leaf-level measure values.
• **Search**
  You can search the measure. Tap **Search** and the following pane appears.

1. Enter a value that you want to search for in the **Value** field.
2. Select a column in which to search the value from the **Column** list. The measure on which you selected the menu appears as selected by default. You can change the selection.
3. To search for the value exactly as you entered, select the **Exact** check box.
4. To match the case of the value exactly the same way as you entered, select the **Match Case** check box.
5. Select either **Up** or **Down** to define the search direction.
6. Tap **Search**.
Drill Up and Drill Down of Charts in Report

1. Tap a section of the chart to see the details of that section. The first tap on the section marks the section as selected. You can see the details of that section in a box above the chart.

2. Tap the selected section of the chart to drill down into that section. To drill up, use the **Drill Up** button.

NOTE: You can drill up and drill down a chart only if it is a hierarchical report with charts on multiple levels. The **Drill Up** button is not displayed if the report is a flat report (non-hierarchical) or the chart is plotted on a single level.
Marking as Favorite

You can mark your item report, summary report and scheduled snapshots as favorites. Tap the Favorites button on the bottom bar and the following window appears.

Item Report Favorite
You can mark an item report as a favorite by using the following steps. Tap an item report and the following window appears.
Tap the button on the bar and make the item a favorite. After tapping the button, the report along with the item is added to your favorite list and the button is changed to . When you run this favorite item report, the item report is loaded for this particular item. You can mark the item report as a favorite for multiple items. This appears as a different option in the Favorites list. If an item report is marked as a favorite, tap the item report and all details related to that item appear. You can remove a report from your favorites list by tapping the Favorite button.

Summary Report Favorite

You can mark a summary report as favorite by using the following steps. Tap a summary report and the following window appears:

Tap the button on the bar and make the item a favorite. After tapping the button, the item is added to your favorites list and the button is changed to . If a summary report is marked as a favorite, tap the Summary Report button and all details related to that report appear. You can remove a report from your favorites list by tapping the Favorite button.
Category of Reports

Reports are categorized into tasks and changes.

**Tasks Reports**

Tap the button to see the list of item reports that are associated to the item of type **Tasks**. You can run or schedule the report.

**Changes Reports**

Tap the button to see the list of item reports that are associated to the item of type **Changes**. You can run or schedule the report.

NOTE: For more information about running or scheduling reports, see Item Reports.
Search

You can use the search option in the Teamcenter Mobility to search for a particular report. Tap the Search button on the bottom bar and the following window appears.

Enter your search criteria in the box and tap Search. The list of items that match your search criteria appears.
To search for specific reports, you can specify **TcRAResport**.
Links

You can create links to an item in a report through the Reporting and Analytics BuildNPlay application. When you tap the link in a report, the corresponding item is opened in Teamcenter Mobility.

Tap the link and the item is opened in Teamcenter Mobility.
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