

**BMW Group**

# **User Manual**

**for PRISMA Web Client**

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## PRISMA Overview

- [Aim and Background to the System](#)
- [PRISMA as the Basis for the SAP Product Structure](#)
- [System Structure](#)

To maintain and distribute these large volumes of data, a Product Data Management (PDM/TDM) system is needed. The PDM system at BMW is PRISMA.

**PRISMA**: **P**roduct data  
**R**esource information  
**I**ntegration  
**S**ystem  
**M**anagement  
with  
**A**rchive

PRISMA can currently perform the following tasks:

- Manage CA data in the SAP product structure in the form of a centralized database
- Supply all operational departments with up-to-date, consistent CAD data
- Link the worlds of CA and administrative data (TAIS, BEMI)
- Link between the CA world and product structure (SAP)
- Provide a data management system for geometrical data
- Manage CA product and tool data
- Provision of virtual cars (export from the SAP product structure) as a basis for the security processes (GI, FI, SI, PTI)

PRISMA was developed at BMW.

### Aim and Background to the System

The main aim of PRISMA is to create and establish a CA original. In order to achieve this aim, all departments involved have agreed upon the "PRISMA philosophy and principles."

Operating as a central CA database, PRISMA serves as the central CA database of all interworking processes in technical vehicle development:

- Development of parts
- Development of tools
- Provision of CA data at BMW
- Integration of suppliers
- Use of the CA data from PRISMA...
  - for subsequent designs and adjacent parts
  - for coordinating parts with tools
  - for control of CA machines (CAM), robots (CAR) and quality measurement machines (CAQ)
  - for generating computational models (CAE)
  - for installation inspection, assembly simulations and many other purposes
  - The CA original is the official reference document of a release-relevant, geometrical model

#### **PRISMA principles**

*All designs are created by order of BMW and are the property of BMW AG*

*Every colleague is responsible for his or her own design*

*Every authorized person has free access to the relevant information concerning his or her tasks*

These principles are not aimed at restricting your freedom of creation, but are intended to make sure that you have unhindered access to all the information you may need.

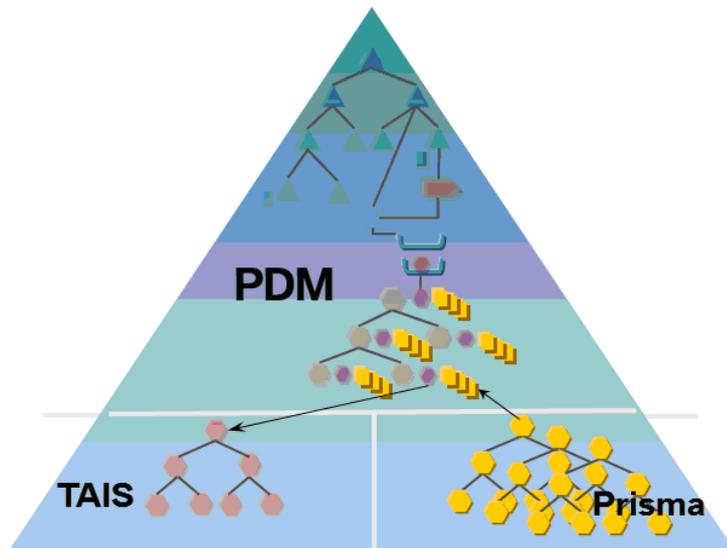
The aim is to achieve consistency of data in the systems used in the technical and administrative worlds.

### PRISMA as the Basis for the SAP Product Structure

The SAP product structure represents the binding data backbone for all systems. It ensures data consistency across the different systems and processes.

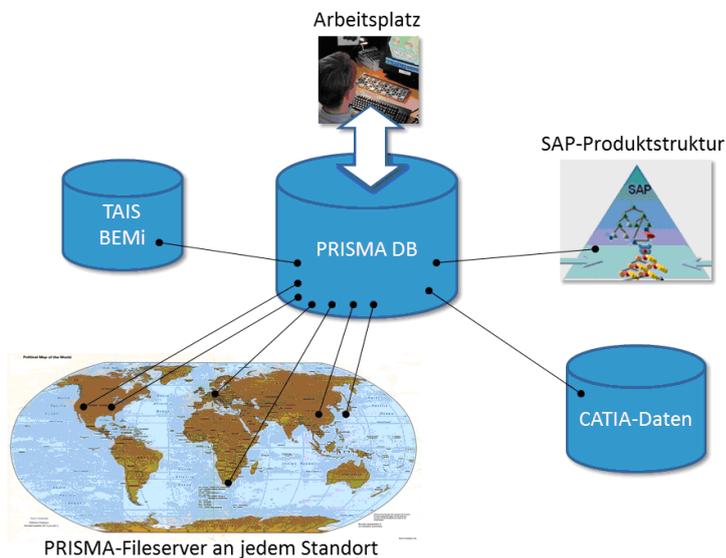
The SAP product structure can be configured. By means of features, attributes and filters, the product structure can be imaged for specific purposes (e.g., virtual cars, report types or according to individual features and construction phases). As a result, different process partners can use the same data from different perspectives.

If the perspectives are to be displayed not only in structure or list format, but also geometrically, data from PRISMA is always used and retrieved from there (e.g., CA data or visualization data).



PRISMA is therefore a key element in the CAD PDM processes since all CA models (including visualization data) are physically present in PRISMA.

## System Structure



Knowledge of general basic principles of the system structure makes it easier to localize the cause of errors in the event of a fault. The major system components are outlined here for this reason. The central database server contains the following information:

- all data you can view with the PRISMA web client
- all access rights
- references to the storage location of the documents.
- Faults in the central database server cause total failure of the systems.

The decentralized file servers contain the actual documents. They are generally saved where they are created. This means that if a document is required in a different location, it must first be transferred. The transfer is carried out automatically and, depending on the transfer path, may involve waiting periods. Faults in a decentralized file server have the result that the models saved by the server are no longer available.

The local CAD workstation is connected with the database server as well as with the decentralized file server. Access to the file server is not possible until an access check has first been passed.

TAIS contains the master data of the parts. Consistency between TAIS and PRISMA is assured by an online connection.

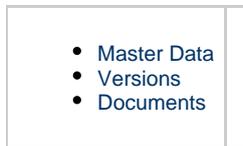
If TAIS is not available, faults occur in the environment of the master data and release functions.

BEMI contains the master data of the tools. Consistency between BEMI and PRISMA is assured by an online connection.

If BEMI is not available, faults occur in the environment of the master data functions.

## Data organization

PRISMA manages



of parts and tools.

### Master Data

Master data contains the key information regarding parts. The data generally describes parts or tools. Information on master data includes the following:

- the part number
- name
- construction group (parts)
- supplier.

All parts and tools managed by PRISMA are clearly identified by the part number of the part.

### Versions

Many design changes are made throughout the life cycle of a part or tool. The version distinguishes between the different design states.

The version is counted in exactly the same way as the drawing index using letters (a – z).

Each version is assigned to a vehicle project.

The task for a new version of a part is identified with the design action number. The version also indicates the following:

- the construction weight
- recycling class
- change description in English and German.

### Documents

The full description of a version is stored in different documents. The relationships and access rights are controlled by means of maturity levels. The documents become more and more complete during the processing period. The maturity level increases.

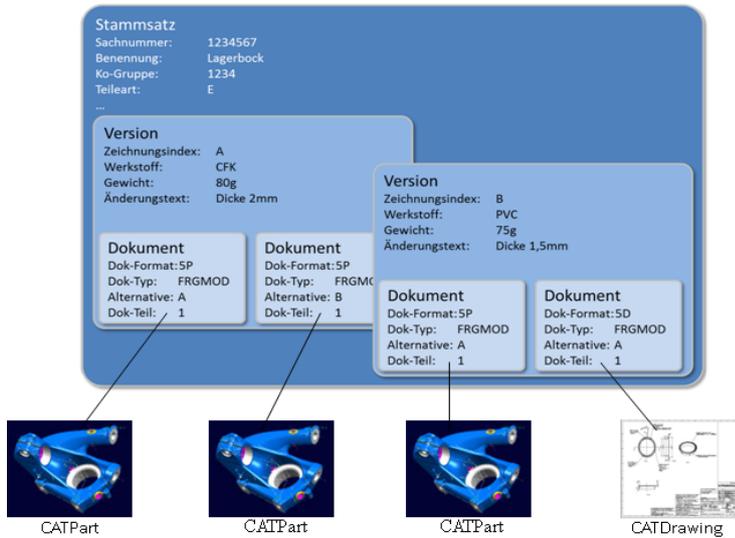
Along with the identification of a document by means of

- part number and
- version

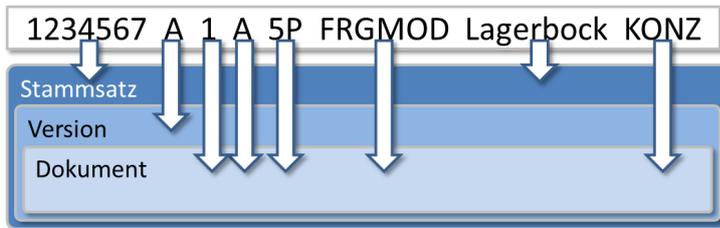
of a part, other criteria are also required for further distinction. These include the following:

- part models
- alternatives
- document types

- document formats.



The full designation of a document comprises the three levels in combination.



For example:

Document type

The different work processes require different representation formats for describing parts (release data, drawings, NC data, computation data, etc.). These representation formats are known as document types in PRISMA.

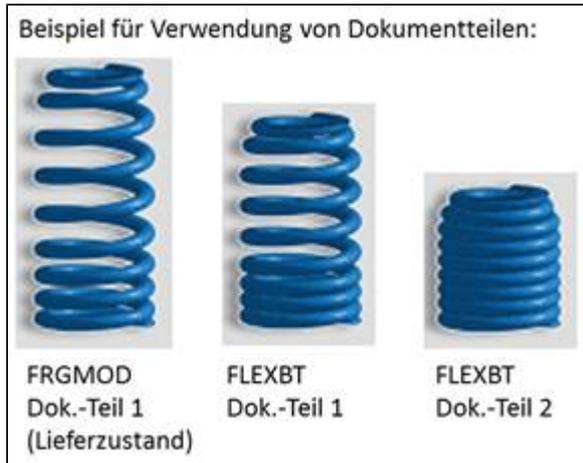
Document format

The term "document format" has been introduced in order to distinguish between CATIA V4 plot sheets, CATIA V4 models, CATIA V5 parts, structures and other types.

Document part (part model)

If a number of documents with the same data type and document format are to be created, they are distinguished by different document parts. This option has different applications in the various technical departments. For example, different movement states of chassis assemblies (angle of lock, suspension travel, etc.) are distinguished by document parts (1, 2, 3...). The standard state relevant for release has the document format FRGMOD, all other states have the format FLEXBT.

Document parts are not substitutes for versions.



#### Alternatives

During development it is necessary to create and coordinate different alternatives and counterproposals for parts to be designed. These are distinguished at document level by alternatives. Alternatives are identified by letters from A to J (without I).



This additional method of distinguishing documents is also applied in different technical departments for different work methodologies.

#### Models

The model is linked with a document. Models can generally only be read by specific IV systems (e.g., CATIA models can only be read by CATIA).

## Concept levels for parts and tools

- The 4-Level Concept for Parts
- The 3-Level Concept for Tools

## Consistent use of CAD

As soon as a part number's geometry has been completely developed (FRGMOD), or further enhanced by CAD, further changes must be carried out in the CAD system to secure the CA original.

In accordance with the part number, the drawings administration obtains a PRISMA mark of origin. Manually created versions for

the DZA are rejected.

## The 4-Level Concept for Parts

The typical phases of maturity can be assigned to 4 levels:

- Concept Level
  - Project Coordination Level, Geometry Verification Level
  - Release Announcement Level
  - Release Level
- 
- Lifecycle across the 4 levels

### Concept Level

The concept level is a designer's personal level. All the documents of a designer are created with the maturity KONZ. At this level usually only the designer is able to read or modify the model.

### Project Coordination Level, Geometry Verification Level

At the project coordination (PRJA) and geometry verification levels, all project colleagues can read the data of a model. The design levels, which are stored here, are frozen so that all colleagues can work with a precisely defined, but still provisional status. On these levels, the model has a non-changeable stable status, e.g. for module coordination or for geometrical analyses of the virtual vehicle.

A designer (with the role KON) can promote individual documents from the concept level to the project coordination level and then to the geometry verification level by increasing the maturity of the document.

The geometry verification level (PRJG) is skipped at EA and in the tools design.

Each document for an alternative design can be entered on the project coordination level. However, only one alternative model can be released (as of PRJG only one alternative model).

### Release Announcement Level

The responsible designer (with the role VKO) can promote each document from the concept level to the release announcement level by increasing the maturity of the document. The geometry checker (role: GPR) promotes documents from the geometry verification level to the release announcement level.

At a release announcement level (AVER, AVOR, APLA, APRO) all internal project users have read rights to a model's data (external users require appropriate additional authorization).

Only one alternative model can be registered for release.

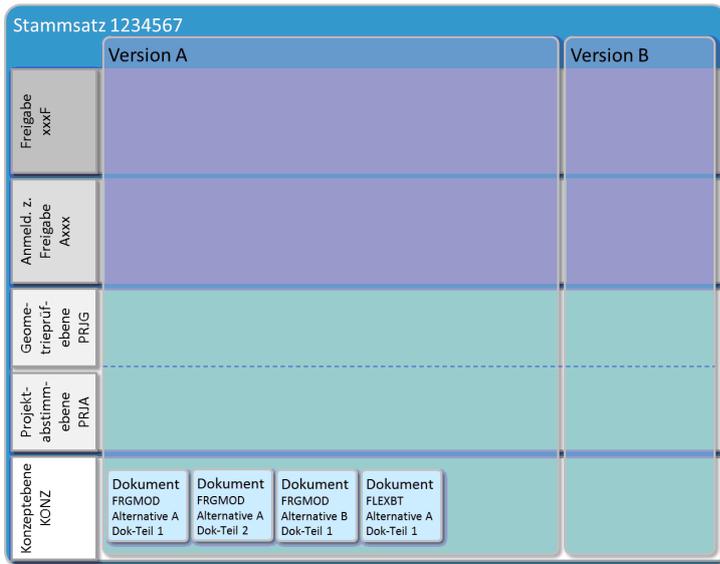
### Release Level

Depending on the release level, a release authorizes subsequent designers to initiate cost-cutting measures to prepare the production.

If the design of a version is completed, the required documents of an alternative model and related administrative data are transferred to the release level by increasing their maturity.

The release of the version freezes the data.

## Lifecycle across the 4 levels



All of a designer's documents are initially created at the concept level with the maturity KONZ. At the concept level, normally only the designer of the model has access to it and can make changes. Daily work at this level is possible without any restrictions.

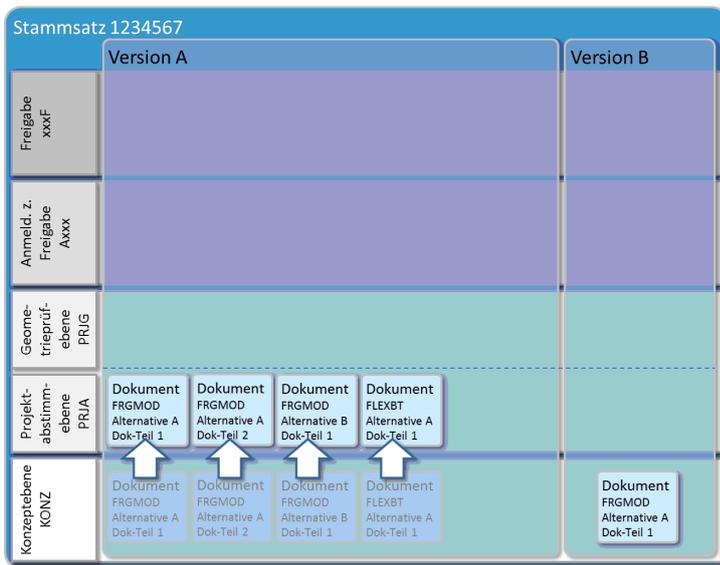
The concept level is also considered to be the designer's private level.

It is necessary in the early phase of a vehicle project (e.g., initial phase or concept phase) to exchange the latest development versions within the project. For this reason, project users can read KONZ (concept) states in the early project phase.

At the project coordination level (PRJA) all project users can read the data of a model. The design levels, which are stored here, are frozen so that all colleagues can work with a precisely defined, but still provisional status. On this level, the model has a non-changeable stable status, e.g. for module coordination.

Each individual document can be transferred from the concept level to the project coordination level by increasing its maturity.

Each document concerning an alternative model can be entered in succession in the project coordination level. However, only one alternative model can be released.



= Report as ready for release

When all chosen release documents of an alternative model are at the project coordination level, the version can be reported to be ready for release. Once the version is reported to be ready for release, the administrative data is also frozen (no more changes allowed). Documents not belonging to the document type FRGMOD can also be later reported to be ready for release as

well.

Once a version has been announced as ready, a new version can then be created. This is necessary if design or administrative changes have to be made.

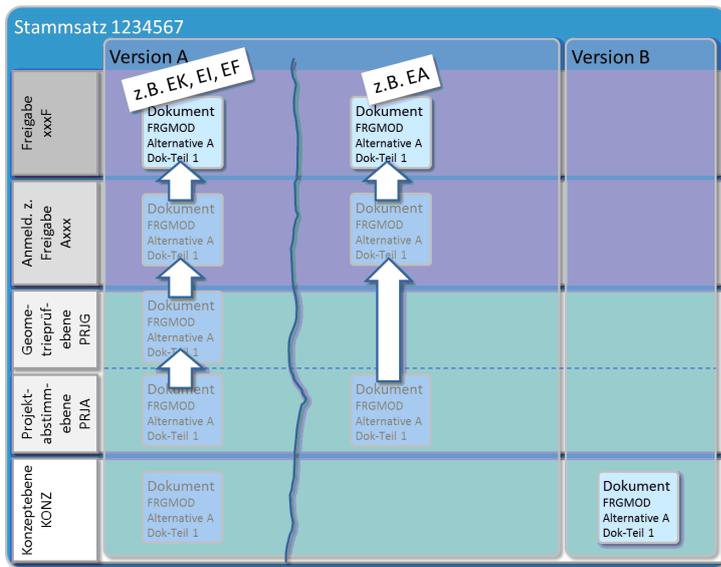
The modified document can then be saved using that version. A document of any version can be used as the basis for the modifications.

From now on the maturity is advanced in the same way.

The project coordination level (PRJA) also includes the subsequent maturity phase, the geometry verification level (PRJG).

At the geometry verification level (PRJG) all project users can read the data of a model (cf. PRJA). The design levels, which are stored here, are frozen so that all colleagues can work with a precisely defined, but still provisional status. Unlike the project coordination level (PRJA), the geometry checkers (role: GPR) have the task of geometrically analyzing and coordinating data relevant to different areas (generally much larger volumes of data).

The geometry verification level (PRJG) is skipped in some departments (for example, at EA and in the tools design).



The next levels are referred to as release announcement or notification levels. These levels apply to the following:

- Registration for test release (AVER)
- Registration for planning release (APLA)
- Registration for preliminary (pre-) release (AVOR)
- Registration for production release (APRO)

The next levels are the release levels. These levels apply to the following:

- Test release (VERF)
- Planning release (PLAF)
- Pre-release (VORF)
- Production release (PROF)

The information editors (role: ISB) handle the actual release. All BMW staff have read rights to released models.

### The 3-Level Concept for Tools

The following PRISMA levels are used for working with tool geometries:

- Concept Level
- Project Coordination Level
- Release Level
  - Further Development

## Concept Level

The concept level is a designer's personal level. All the documents of a designer are created with the maturity KONZ. At this level usually only the designer is able to read or modify the model.

## Project Coordination Level

At the project coordination level (PRJA) all project users can read the data of a model. The design levels, which are stored here, are frozen so that all colleagues can work with a precisely defined, but still provisional status. On this level, the model has a non-changeable stable status, e.g. for module coordination.

Each individual document can be transferred from the concept level to the project coordination level by increasing its maturity.

Each document for an alternative design can be entered on the project coordination level. However, only one alternative model can be released.

## Release Level

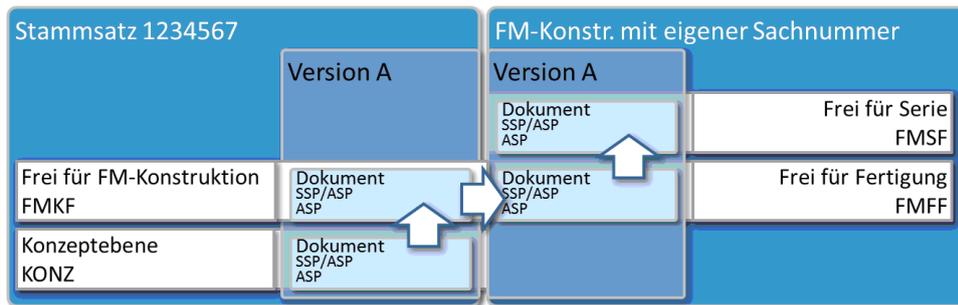
Depending on the release level phase, the release of tool geometries authorizes subsequent designers to initiate cost-cutting measures to prepare the production.

If the design of a version is completed, the required documents of an alternative model and related administrative data are transferred to the release level by increasing their maturity.

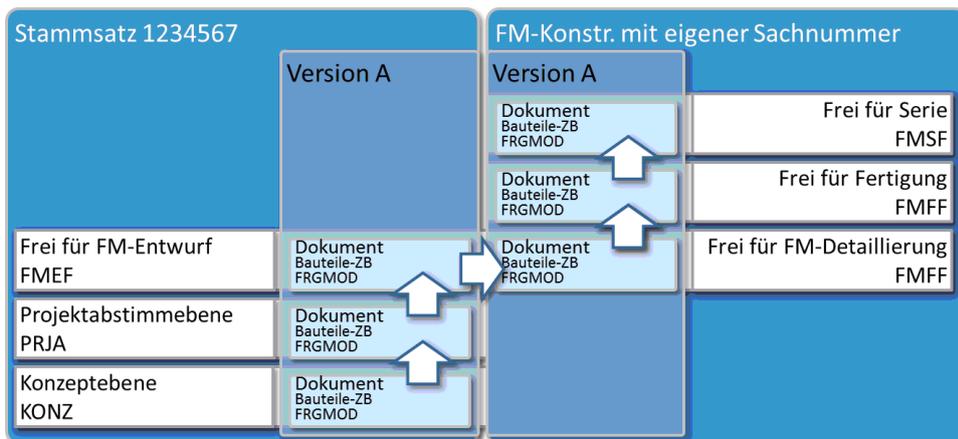
The release of the version freezes the data.

The tool releases are schematically presented in the following overviews. Not all release level phases need to be completed. The status "ready for production" is required at the very least. The release level stages are explained on the following pages.

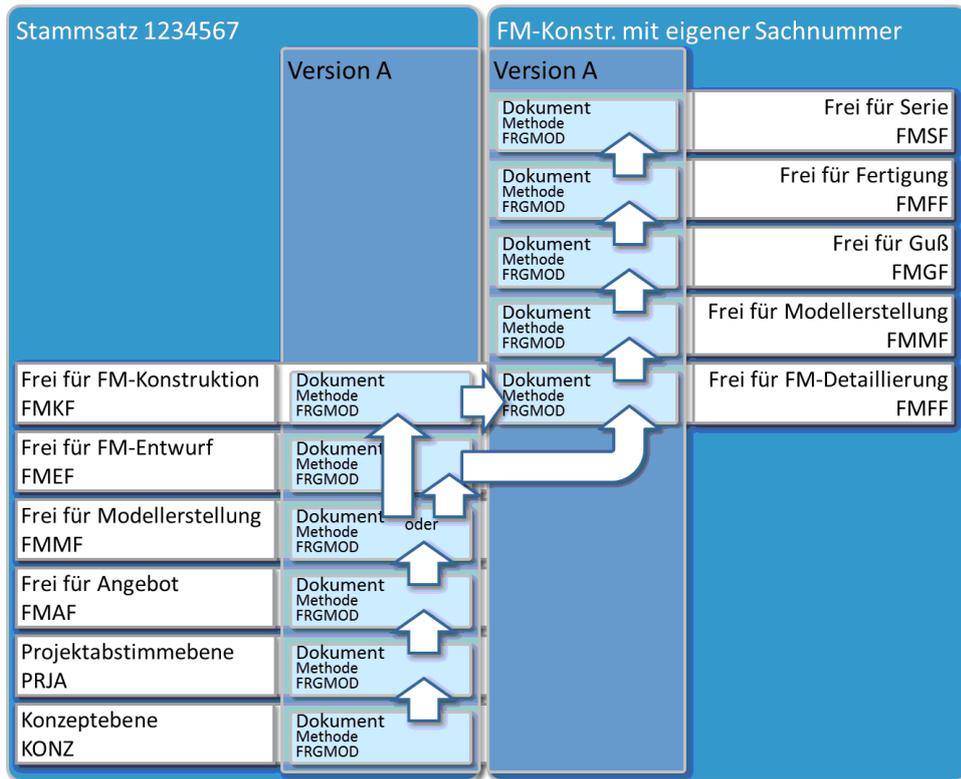
### Overview of Release of Raw Designs



### Overview of Assembly Release



### Overview of Release of Extrusion Equipment / Tool Manufacturing



Tools Releases and Derived User Rights

Freigabe	Erläuterung	Reife-grad	Technologie					Geometrie					DZA		
			Rohbau	SP/SW	Montage	SM	SG	SSP ASP	Me-thode	BT Zus-bau	Ent-wurf	Kon-struktion		Sheet automatisch an DZA	
Frei für Angebot	Grundlage für Angebot	FMAF		X						X					---
Frei für Modellerstellung	Grundlage für Modellerstellung Ziehanlage bzw. Gußmodell	FMMF		X						X			X		---
Frei für FM-Konstruktion	Berechtigt zur Konstruktion des Fertigungsmittels einschließlich der Detaillierung	FMKF	X	X		X	X	X	X	X	X				---
Frei für FM-Entwurf	Berechtigt zum FM-Entwurf	FMEF		X	X		X		X	X					---
Frei für FM-Detaillierung	Berechtigt zur Detaillierung der FM-Konstruktion	FMDF		X	X	X	X		X	X	X				---
Frei für Guß	Berechtigt zum Gießen	FMGF		X									X		---
Frei für Fertigung	Die Geometrie beschreibt den letzten theoretischen Stand, der gefertigt wird. Die Freigabe berechtigt zum Auslösen der Mittel für die FM-Herstellung	FMFF	X	X	X	X	X		X				X		wenn vorhanden
Frei für Serie	Die Geometrie beschreibt den geometrischen Stand, wie er zur Serienproduktion eingesetzt wird. Die Anlage liefert i.o. Teile. Die Geometrie entspricht dem eingeschwungenen Prozeß. <b>Nur diese Freigabe berechtigt zur Mehrfach- oder Wiederbeschaffung des Fertigungsmittels.</b>	FMSF	X	X	X	X	X		X				X		wenn vorhanden

**Further Development**

Design and administrative changes are carried out by generating a new version (increasing the drawing index). The modified document can then be saved using that version. A document of any version can be used as the basis for the modifications.

**User Rights**

- Tree Structure-related Authorization
- Authorization matrix
- Overview of roles for authorization
- Protection of vehicle data

## Principles of Authorization

Only authorized users have general access to PRISMA.

Access to PRISMA objects (documents, projects, etc.) varies according to verification of authorization relating to

- documents
- maturity level
- role (general user rights, project rights).

The more advanced the maturity level is, the lower the access rights required.

The project-dependent and maturity level-dependent components are controlled by the PRISMA users by

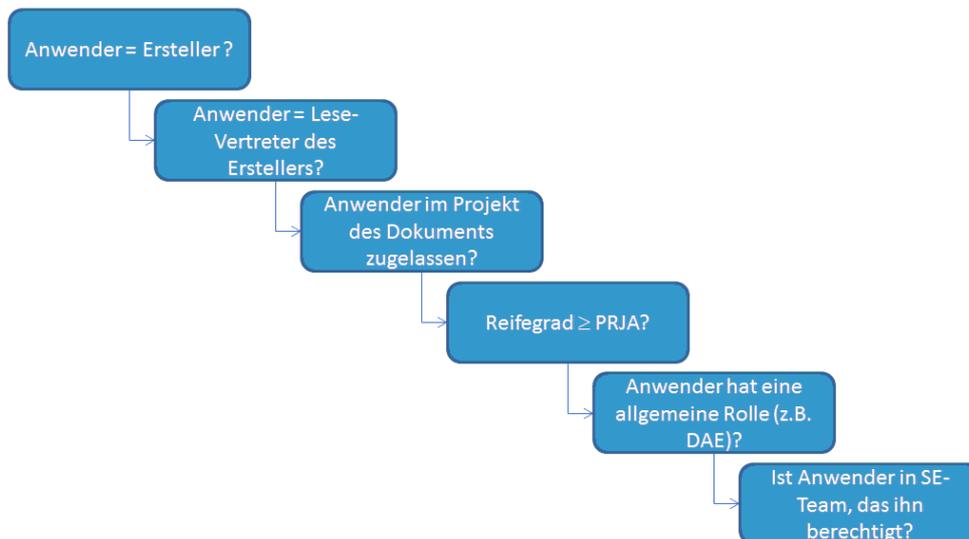
- assignment of project rights
- reporting of the documents as ready for release (controlling the maturity).

The following points are in principle inspected for access verification:

- Is the action permitted for the maturity level of the document?
- Does the user possess a project-specific authorizing role?
- Does the user have a general authorizing role?
- Did the author of the document inform the user by a direct message (SE team)?

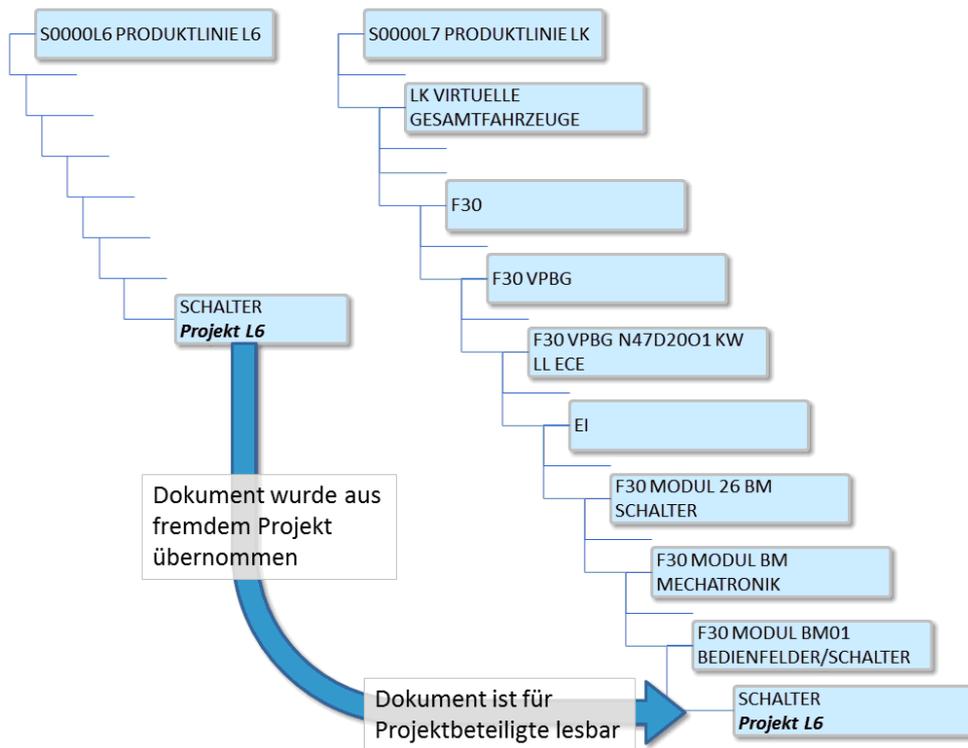
### Example:

| Internal flow for an authorization check for the action "read a document."



## Tree Structure-related Authorization

When reading documents (CA models, drawings, etc.), an additional access rights check – tree structure-related authorization – is carried out.



A PRISMA vehicle tree contains many documents, for example, that have not occurred in this car project. This includes, for example, parts derived from prior projects or identical parts from neighboring vehicle projects.

With tree structure-related authorization, project authorization for the vehicle project is sufficient provided the documents are located in the PRISMA vehicle tree.

This means that it is no longer necessary for vehicle projects to authorize the staff members for all projects (engines, transmission systems, standard parts, carry-over parts, prior projects). It is enough to grant authorization in the relevant vehicle project in order to be able to access all relevant documents.

Excepted from this procedure are documents with the maturity level KONZ and secret project documents.

## Authorization matrix

The following tables show the user access rights for BMW company employees and external contractors.

Rolle	PMA						PMR			keine Projektrolle												
	Ersteller			Andere			R	W	C	Schreibv.			Lesev.			Andere			SE-Team			
Recht <sup>1</sup>	R	W	C	R	W	C				R	W	C	R	W	C	R	W	C	R	W	C	R
KONZ	x	x	x							x	x		x						x	x <sup>3</sup>		
PRJx	x			x			x			x			x						x			
Axxx	x			x			x			x			x			x <sup>2</sup>			x			
xxxF	x			x			x			x			x			x <sup>2</sup>			x			

1) R = read, W = write (also delete), C = create

2) BMW employees only

3) ST documents only

**Note:** Access in the case of secret projects is only possible with project roles.

## Overview of roles for authorization

The following table provides an overview of the meanings of the most important roles.

Role	Name	Type	Meaning
DAE	Data export	General role	Export of data via OpenDXM
EXT	PRISMA user (external)	General role	Restricted rights
GPR	Geometry checker	General role	Report as ready PRJG -> announce for release
ISB	Information editor	General role	Report ready announcement level -> release level; change master data, versions, documents
KON	Designer (EE, EK)	General role	Report ready for release PRJA, PRJG
PMA	Project staff	Project role	Read models starting at PRJA, create versions, documents
PMR	Project staff read rights	Project role	Read models starting at PRJA
PVO	Project administrator	Project role	Approval of project users (not PVO/PL), read rights KONZ
USR	PRISMA user (internal)	General role	Read models starting at release announcement level
VKO	Responsible designer	General role	Report ready PRJA release announcement level
VOB	Local support	General role	Access for project manager (PVO)
AVF	Administrative version release	General role	Administrative changes (PRJA -> Axxx)
ISB	Information editor	General role	Report ready release announcement level -> release level; change master data, versions, documents
SWC	Supplier Working Context	General role	Definitions of work contexts for data exchange with suppliers

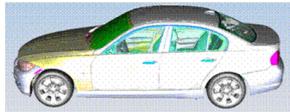
## Protection of vehicle data

PRISMA projects have a general and a specially protected part. You can see the general part with the previous PRISMA roles PMA/PMR, but the specially protected part can no longer be seen with these roles or can no longer be accessed.

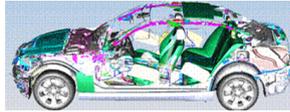
All visible parts of the outer view and the interior at the front for vehicle and motorcycle projects that have not yet reached SOP (start of production) are specially protected.

Protection is provided on the basis of the PRISMA module entries. This means that all parts whose PRISMA version has a module entry with a protected module (see the table) cannot be written or read with the previous PRISMA authorization roles PMA and PMR.

Darstellung incl. geschützter Module

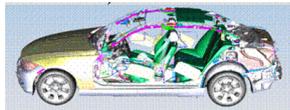


Darstellung ohne geschützter Module (Standard)



Additional authorization is needed for specially protected parts.

Darstellung mit selektiver Zulassung für geschützte Module



The PRISMA modules listed in the table below (in the column on the right) are specially protected for projects before SOP. The specially protected modules are combined in module groups. The module group corresponds to the PRISMA role needed to access data. A user requiring access to different module groups can obtain authorization by means of grouped roles. Once a project reaches SOP, no special rights are needed any longer:

Geschützte Module und deren Modulgruppen		
		AD 1, 03.01 (Stoßfänger) AD 2, 03.02, 03.07 (Vorderwand, Luftführungen) AD 3, 02.06, 06.01, 06.02 (Frontklappe, Seitenwand) AG 3 (Scheinwerfer, Fanfaren)
AHV	Außenhaut Vorn	
		AB 1, 01.50, 01.51, 01.53 (Seitengerippe) AB 2, 05.24 (Cabrio Schutzsystem) AB 3, 01.52, 02.15, 05.10 (SHD, PaDa, Dach und Dachrahmen) AB 4, 05.25, 05.28 (Verdeck Softtop, Hardtop, Versenkbares Hardtop) AB 5, 05.26 (Verdeckdeckel, Verdeckkastenboden) AB 7, 02.07, 01, 02 (KG- komplett, Oberflächen) AE 1, 02.05, 04.01, 04.08 (Türstruktur, feste Scheiben) AE 2, 04.02, 04.04, 04.05, 21.25, 21.28, 25.50, 25.60 (Türmechanik) AG 1, 02.03, 02.13, 02.14 (Scheiben, Leisten) AH 2, 02.01 (Erscheinungsbild Exterieur)
	Außenhaut Mitte	Modul 85 (Karosserie Motorrad)
AHM	bzw. Außenhaut Motorrad	Modul 89 (Motorrad Gesamtfahrzeug)
		AF 1, 03.05, 03.08 (Stoßfänger, Schwellenverkleidung) AF 2, 02.04, 02.34, 06.03, 06.04, 06.05, 25.61 (Tank-/ Heckklappe / Anbauteile) AF 3, 06.08, 06.09, 25.62, 25.65 (Heckwisch- /-waschsystem und integrierte Scheibe)
AHH	Außenhaut Hinten	AG 4 (Heckleuchten, Kennzeichenleuchte)
		AE 4, 04.06, 04.07 (Türverkleidung) BH 01 (I- Tafel) BH 02 (Mittelkonsole) BH 04 (Airbag I-Tafel) BM 01 (Bedienfelder, Schalter) BM 09 (Bedient. Klima, Fond) BM 02 (SZ Lenksäule) BM 03 (Innenleuchten) BM 04 (GWS) BM 05 (Center Stack (CBF)) BM 06 (GWS ZBE) BM 07 (Funkschl. ID-Geber Sender FS) BM 08 (Aux. In /HUB Zig-Anz Steckb.) Modul 07xx (Cockpit) Modul 26xx (Schalter)
INV	Interieur Vorn	

Double-character higher-level module entries in the new module structure, such as AA or AF, are only permitted for structures (ST). This excludes, for example, 5P and 5Y.

The module AH2 must be used for general module surface data at EK. The module 07 must be used for general module surface data at EI.

Access limits apply to all accesses to the PRISMA database (CATIA, internal/external visualization, data exchange, checkouts). They also apply to data released in projects before SOP.

## Protection of Competitors, KONZ Protection, Secret Projects

- [Protection of Competitors](#)
- [KONZ Protection in the Early Phase](#)
- [Secret Projects](#)

### Protection of Competitors

In order to protect the know-how of competing suppliers to the BMW Group, all information relating to a part number can be protected in PRISMA against unauthorized access. To this end, competitions are created in which parts, assemblies or concepts can be managed in PRISMA. The models entered by a competitor cannot be viewed by other competitors in the scope of a competition.

The protection of competitors can be optionally assigned for a part number and consequently for all documents available under that part number. Access for PRISMA users outside the competitor groups is managed by the PRISMA set of rules.

### KONZ Protection in the Early Phase

It is necessary in the early phase of a vehicle project (e.g., initial phase or concept phase) to exchange the latest development versions within the project. For this reason, project users can read KONZ (concept) states in the early project phase.

However, there is highly parameterized CAD data in the technical departments that needs to be specially protected. A dedicated protection mechanism, "KONZ protection", is offered for these part numbers.

KONZ documents for protected part numbers can only be read by the author, read- and write-authorized substitutes and linked SE teams. They cannot be read by project members in the early phase; the PRISMA role "KOR" is also not entitled to read authorization.

Documents for these part numbers with a maturity greater than KONZ are subject to the standard PRISMA set of rules. In the case of such protected KONZ data, the author must produce stripped copies with a maturity greater than KONZ for the same part number, and must provide and update the copies in the official PRISMA vehicle structures.

KONZ data with KONZ protection cannot be read by all project members. This data is therefore not permitted to be entered in official PRISMA vehicle structures.

The owner and his or her write-authorized deputy can enter and change the KONZ protection. Special roles, such as VOB and REP are not permitted to withdraw the KONZ protection.

### Secret Projects

Projects can be marked as "secret" when being created in PRISMA.

The organizational data (part numbers, name, etc.) as well as the geometrical data is visible only to the project users as a result of the "secret" marking.

By means of SE team authorization, the data can be made accessible to PRISMA users without the appropriate project authorization in a secret project.

Secret projects can be converted into standard projects by calling the PRISMA hotline.

### What to do in the case of errors

Faults or error messages can be caused by the following:

- CATIA errors
- Data exchange errors
- PRISMA errors
- Hardware faults
- Network faults

If you cannot resolve an error yourself, please contact your local service center.

The PRISMA hotline is intended as the first point of contact for your local service center. Please use the hotline in emergency cases only.

PRISMA hotline: -61663

## Searching data

All searches for master data, versions and documents are performed using a central search dialog (side menu: PRISMA –

Search, or with the toolbar icon "" in the results list). The results of each search are displayed in a [results list](#) comprising a tree and table layout. When searching, you have the choice as to whether you want to overwrite the previous contents of the list or if you want to add the search results to the existing contents. The criteria of a **Replacing Search** can be saved and applied to a shortcut on the desktop for quick reuse.

You can find a description of the search options in the subsections of this section.

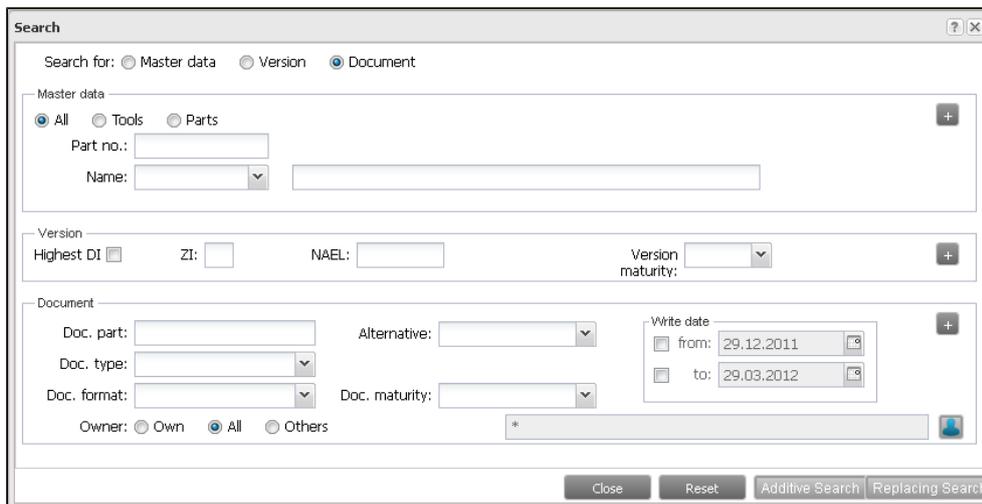
- [PRISMA Searches](#)
- [Search Range - All](#)
- [Search Range - Tools](#)
- [Search Range - Parts](#)

### PRISMA Searches

This section describes the layout and functionality of the search dialog. The dialog is divided into five sections from top to bottom.

- Search object (master data, version or document)
- Section for entering criteria for master data (Master data panel)
- Section for entering criteria for a version (Version panel)
- Section for entering criteria for a document (Document panel)
- Toolbar with buttons

The basic Search window shows the initial state of the dialog when the search function is used for the first time.



The panels for entering criteria can have either of two states in each case: a basic state and an expanded state. The basic state contains search criteria that are always visible. You can use the plus button (+) in the top right corner of each panel to open it out from the basic to the expanded state. In the expanded state you can see search criteria that are required less often.

By selecting a radio button in the top section of the dialog you specify the search object type and number of criteria that are available.

- **Master data:** Only search criteria for master data are available. The search results contain master data records (part numbers). You can navigate from the results in the results list to their versions and documents. Documents with a structure (ST and 5Y documents) can be broken down further.
- **Version:** Search criteria for master data and versions are provided. The search results contain versions. You can navigate from the results in the results list to their documents. Documents with a structure can be broken down further.
- **Documents:** Search criteria for master data, versions and documents are provided. The search results contain documents. Documents with a structure can be broken down further.

A panel is grayed out or the contents of a search field removed if not required due to the selected search object. If the panel becomes available once more, previously entered values in the fields are again visible and applicable to the search.

The information icon () indicates that values for the search take effect in the collapsed state of the panel that belong to the fields not visible in the expanded state.

In the **Document** panel the date criteria for the write date apply only to documents with models. The criterion is regarded as being satisfied for documents without models – i.e., they are always found.

You can use the wildcards \* and % in text input fields, but you cannot search for them. During an entry, the input of previous searches for selection are offered, which complete the characters entered so far. The arrow keys on an input box display a list of up to 20 previous entries for reuse.

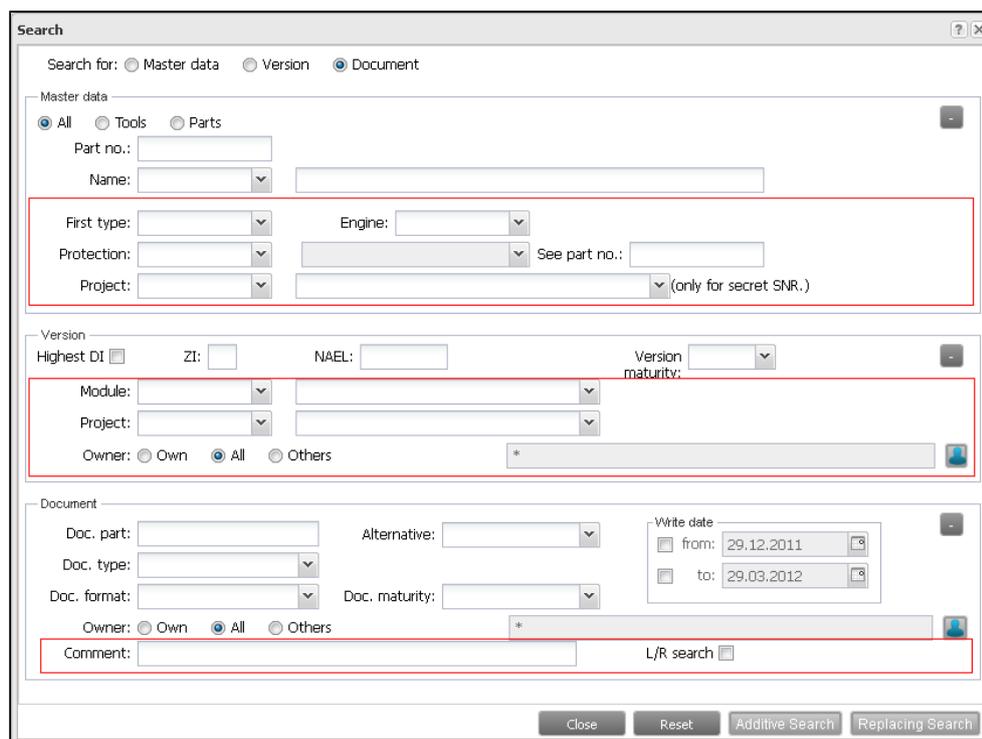
Only objects matching all specified search criteria at the same time are found.

The panels for **Master data** and **Version** differ according to the type of master data selected (All, Parts or Tools) in the Master data panel. The fields are changed in the lower section of the panel.

The expanded dialog alternatives deriving from the differences between the master data types are displayed and described in the following sections.

## Search Range – All

The search range **All** defines a number of additional search criteria for master data, versions and documents. The state of the search dialog that occurs if all three panels are expanded and the search range **All** is selected is shown below.



## Search Range – Tools

If you select the search range **Tools** in the master data panel, the expanded master data and version panels contain additional fields that are not visible for the option **All**. This section describes the search criteria that are additional to searches using the range **All**. In other words, all fields in the search range **All** remain as they are and only additional criteria specific to the range **Tools** are added.

**Search**

Search for:  Master data  Version  Document

**Master data**

All  Tools  Parts

Part no.:

Name:

First type:  Engine:

Protection:  See part no.:

Project:  (only for secret SNR.)

Main TA:  ToolsC:  CH:

**Version**

Highest DI  ZI:  NAEL:  Version maturity:

Module:

Project:

Owner:  Own  All  Others

**Document**

Doc. part:  Alternative:

Write date: from:  to:

Doc. type:

Doc. format:  Doc. maturity:

Owner:  Own  All  Others

Comment:  L/R search

Close Reset Additive Search Replacing Search

## Search Range – Parts

This section describes the search criteria that are added when using the search range **Parts** if the **Master data** and **Version** panels are expanded – i.e., all fields in the search range **All** remain as they are and only additional criteria specific to the range **Parts** are displayed.

Search

Search for:  Master data  Version  Document

Master data

All  Tools  Parts

Part no.:

Name:

First type:  Engine:

Protection:  See part no.:

Project:  (only for secret SNR.)

KOGR:  Blank no.:  Repl. for:

Version

Highest DI  ZI:  NAEL:  Version maturity:

Module:  AI:

Project:

Owner:  Own  All  Others

Document

Doc. part:  Alternative:

Doc. type:

Doc. format:  Doc. maturity:

Write date

from: 29.12.2011

to: 29.03.2012

Owner:  Own  All  Others

Comment:  L/R search

Close Reset Additive Search Replacing Search

Related topics:

- [Neighborhood searches for parts](#)
- [Search - Where Used...](#)
- [Create WebDesktop Shortcut](#)
- [Search in Structure](#)

## Neighborhood searches for parts

The context menu item **Neighborhood Search** opens a pop-up dialog with which, starting from a part (CA/5P documents), all neighboring parts in a structure (ST document) can be found whose bounding box (smallest box around the object) is either completely or partially within a defined search area.

**Neighborhood Search**

Reference nodes

Part no.	ZI	Doc. part	Alt	Doc. format	Doc. type	Name	Doc. maturity
1234567	E	1	A	ST	FRGMOD	SCHWINGARM	KONZ

Reference parts

Part no.	ZI	Doc. part	Alt	Doc. format	Doc. type	Name	Doc. maturity	Instance name
P870064	A	2	B	CA	BMB	ATL DUMMY N57 PRJA		

Conflicts

Part fully included in search volume  
 Part fully or partially included in search volume

Consider only parts with bounding box

Define search volume

Offset to bounding box  
 Offset to search point  
 Direct entry

Bounding Box

Min		Max
x:	-295.12	x: -31.25
y:	101.03	y: 379.72
z:	-14.65	z: 324.57

Search volume

Min		Max
x:	-295.12	x: -31.25
y:	101.03	y: 379.72
z:	-14.65	z: 324.57

Offset

Delta

x: 0.00  
y: 0.00  
z: 0.00

Buttons: Reset, Close, Search

The dialog shows in a list named "reference nodes" the structure elements and in a list named "reference parts" the instances that have been selected from the results list. At least one reference node must be selected.

The search volume can be defined in any of the three different ways:

1. Bounding box of the reference part increased by the specified delta value.

**Neighborhood Search**

Reference nodes

Part no.	ZI	Doc. part	Alt	Doc. format	Doc. type	Name	Doc. maturity
1234567	E	1	A	ST	FRGMOD	SCHWINGARM	KONZ

Reference parts

Part no.	ZI	Doc. part	Alt	Doc. format	Doc. type	Name	Doc. maturity	Instance name
P870064	A	2	B	CA	BMB	ATL DUMMY N57 PRJA		

Conflicts

Part fully included in search volume  
 Part fully or partially included in search volume

Consider only parts with bounding box

Define search volume

Offset to bounding box  
 Offset to search point  
 Direct entry

Bounding Box

Min		Max
x:	-295.12	x: -31.25
y:	101.03	y: 379.72
z:	-14.65	z: 324.57

Search volume

Min		Max
x:	-300.12	x: -26.25
y:	96.03	y: 384.72
z:	-19.65	z: 329.57

Offset

Delta

x: 5.00  
y: 5.00  
z: 5.00

Buttons: Reset, Close, Search

2. Input of the coordinates of a point within the bounding box of the reference part, along with the offset in each direction.

The screenshot shows a complex dialog for defining search volume. It includes sections for 'Conflicts', 'Define search volume', 'Offset', and 'Search volume'. The 'Define search volume' section has three radio buttons: 'Offset to bounding box', 'Offset to search point' (selected), and 'Direct entry'. The 'Offset' section has a 'Delta' field with values x: 131.94, y: 139.35, z: 169.61. The 'Search volume' section has 'Min' and 'Max' coordinate fields. The 'Search point' field is highlighted with a red box, showing x: -103.19, y: 200.37, z: 204.96.

3. Direct input of the search volume by entering the coordinates of two points that span the search volume.

This screenshot shows the same dialog as above, but with the 'Direct entry' radio button selected. The 'Search volume' section is highlighted with a red box, showing 'Min' coordinates (x: -495.12, y: 301.03, z: -214.65) and 'Max' coordinates (x: -101.25, y: 579.72, z: 524.57).

The results of the neighborhood search based on the search volume specified in the dialog are expanded in the results list and are highlighted.

**PRISMA Search**  
 5 hits for neighborhood search

Search:  Hervorheben

Status	Part number	Name (ger)	ZI	DP	A	DF	Doc. type
	1234567	SCHWINGARM	E	1	A	PL	SOLMOD
	1234567	SCHWINGARM	E	1	A	ST	FRGMOD
	P754650	KRAFTSTOFFLEITUNGEN N57	A	1	C	CA	PACKAG
	P870064	ATL DUMMY N57 10MM VOR	A	2	B	CA	BMB
	P870064	ATL DUMMY N57 10MM VOR	A	2	B	SP	FRGMOD
	P907484	KONZEPT KM-FUEHRUNG ATL N57	A	1	C	CA	BMB
	P907484	KONZEPT KM-FUEHRUNG ATL N57	A	1	C	SP	FRGMOD
	4718945	ABSTUETZUNG ATL N57	A	1	A	CA	BMB
	4718945	ABSTUETZUNG ATL N57	A	1	A	SP	FRGMOD
	4719006	OELRUECKLAUF ATL N57	A	1	A	CA	BMB
	4719006	OELRUECKLAUF ATL N57	A	1	A	SP	FRGMOD

The search results can be saved in an existing ST using the context menu functions **Copy Instance** and **Insert Instance**.

If multiple reference parts are selected, the search volume can only be defined to a limited extent:

**Neighborhood Search**

Reference nodes

Part no.	ZI	Doc. part	Alt	Doc. format	Doc. type	Name	Doc. maturity
1234567	E	1	A	ST	FRGMOD	SCHWINGARM	KONZ
1234567	F	1	A	ST	FRGMOD	SCHWINGARM TES KONZ	

Reference parts

Part no.	ZI	Doc. part	Alt	Doc. format	Doc. type	Name	Doc. maturity	Instance name
Z000731	A	1	A	5P	FRGMOD	MANTEL-MSD	KONZ	
4719006	A	1	A	5P	FRGMOD	OELRUECKLAUF	VERF	

Conflicts

Part fully included in search volume  
 Part fully or partially included in search volume

Consider only parts with bounding box

Define search volume

Offset to bounding box  
 Offset to search point  
 Direct entry

Bounding Box

Min		Max	
X:	<input type="text"/>	X:	<input type="text"/>
Y:	<input type="text"/>	Y:	<input type="text"/>
Z:	<input type="text"/>	Z:	<input type="text"/>

Offset

Delta	
X:	<input type="text" value="0.00"/>
Y:	<input type="text" value="0.00"/>
Z:	<input type="text" value="0.00"/>

Application to Bounding Boxes for all Reference parts

Search volume

Min		Max	
X:	<input type="text"/>	X:	<input type="text"/>
Y:	<input type="text"/>	Y:	<input type="text"/>
Z:	<input type="text"/>	Z:	<input type="text"/>

If no reference part is selected, reference parts in the search volume are found:

**Neighborhood Search**

Reference nodes

Part no.	ZI	Doc. part	Alt	Doc. format	Doc. type	Name	Doc. maturity
1234567	E	1	A	ST	FRGMOD	SCHWINGARM	KONZ

Reference parts

Part no.	ZI	Doc. part	Alt	Doc. format	Doc. type	Name	Doc. maturity	Instance name
----------	----	-----------	-----	-------------	-----------	------	---------------	---------------

Conflicts

Part fully included in search volume  
 Part fully or partially included in search volume

Consider only parts with bounding box

Define search volume

Offset to bounding box  
 Offset to search point  
 Direct entry

Bounding Box

Min		Search point	Max	
X:	<input type="text"/>	X:	<input type="text" value="0.00"/>	<input type="text"/>
Y:	<input type="text"/>	Y:	<input type="text" value="0.00"/>	<input type="text"/>
Z:	<input type="text"/>	Z:	<input type="text" value="0.00"/>	<input type="text"/>

Offset

Delta	
X:	<input type="text" value="0.00"/>
Y:	<input type="text" value="0.00"/>
Z:	<input type="text" value="0.00"/>

Search volume

Min		Max	
X:	<input type="text" value="0.00"/>	X:	<input type="text" value="0.00"/>
Y:	<input type="text" value="0.00"/>	Y:	<input type="text" value="0.00"/>
Z:	<input type="text" value="0.00"/>	Z:	<input type="text" value="0.00"/>

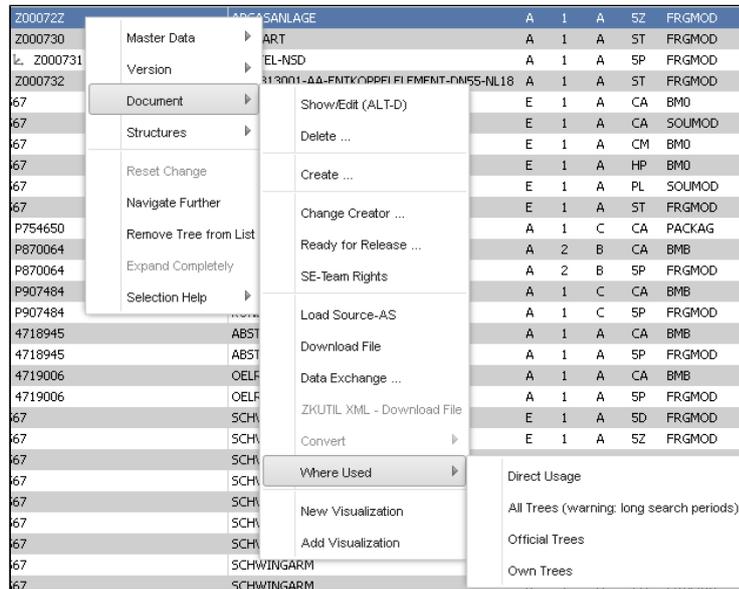
Reset Close Search

## Search - Where Used...

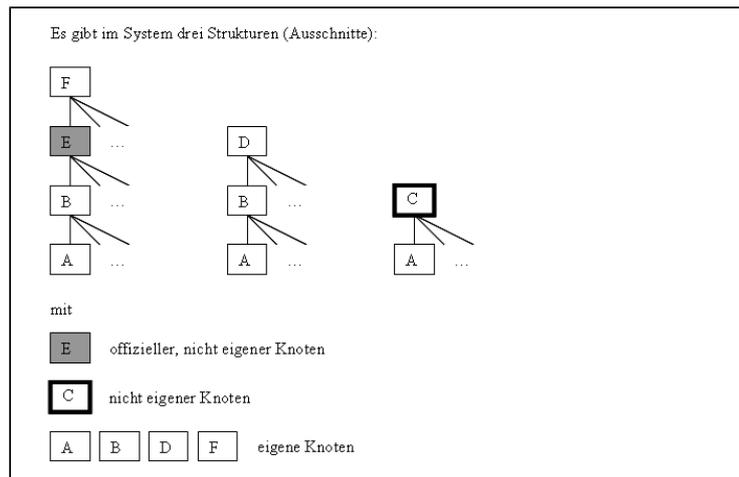
Using **Where Used** and based on an integrated document (document format = CA, 5P, etc.) of a structure, its use in all PSN

vehicle trees can be displayed.

If you select a document from the results list, the secondary context menu item **Where Used** shows a submenu, whose items limit the search to uses.



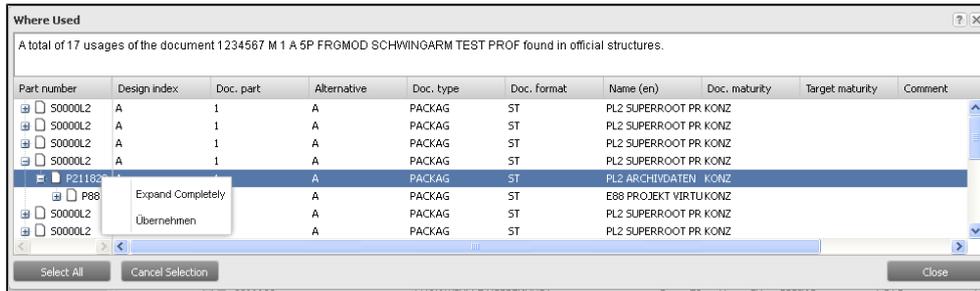
Example of a "Where Used" scenario for use of "A"



- **Direct use:** The hits contain all structure documents that directly use the selected document (see example: B – C).
- **All trees:** The hits contain trees with root nodes and official nodes (see example: C - A, D - B - A, E - B - A, F - E - B - A).
- **Official trees:** The hits contain only trees that start with an official node – i.e., those whose part numbers start with S (see example: E - B - A).
- **Own trees:** The hits contain only trees that start with a node belonging to the user (see example: D - B - A, F - E - B - A).

The progress of the search is displayed.

The hits for the selected submenu item are shown in a pop-up dialog. The number and type of hits are shown in the message area in the top section of the dialog. The column width of the list of hits can be changed by dragging the column header edges. The root nodes are collapsed when first shown. You can expand a root node in stages by clicking the prefixed plus sign (+) or the submenu item **Expand Completely**.



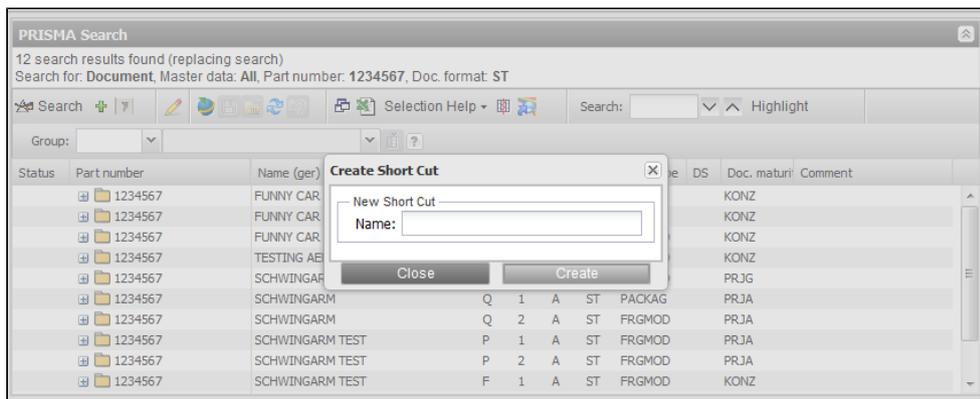
You can add selected rows or all rows to the topmost level of the results list in collapsed form from the pop-up dialog using the context menu item **Apply**.

## Create WebDesktop Shortcut

After a replacing search, the search operation can be stored as a shortcut placed on the web desktop.

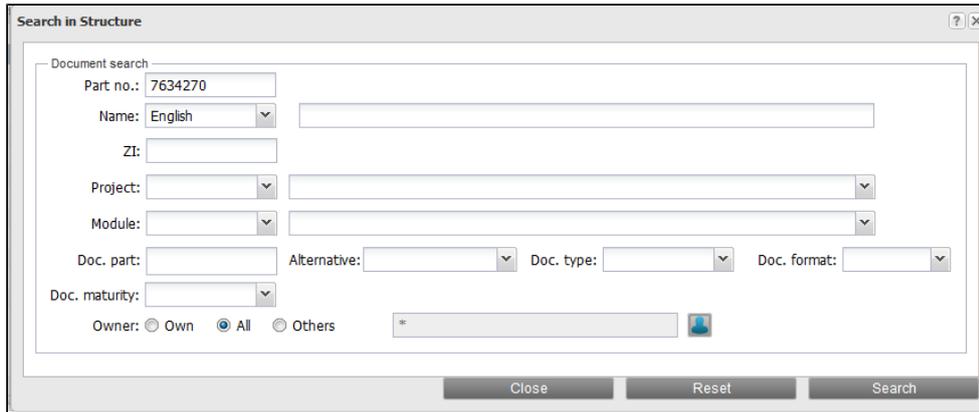
A click on the tool bar symbol "" opens a dialog to create the shortcut.

A name, describing the stored search should be used. The button **Create** will create the shortcut and place it on the web desktop.



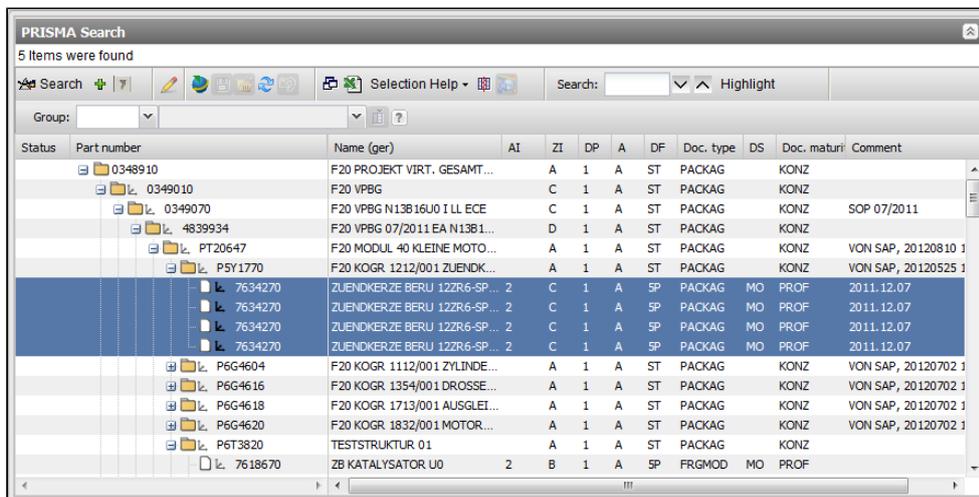
## Search in Structure

The sub menu entry **Search in structure** of a selected structure document (ST) or an instance will open the dialog "Search in structure".



In the dialog, the search criteria can be defined. If the switch "Other" is selected for the owner, the symbol "" for a user search is available.

The button **Search** will start the search inside the selected structure document. After search has finished, the tree is expanded for all matching documents which will be selected automatically.



## Displaying data

A modular waiting dialog is shown until a [search request](#) has been completed and the search results are loaded. The search results are then displayed in a [Search results](#) display. The search results are always displayed in collapsed form – i.e., they are shown as a list that can be expanded.

The number of hits shown is administratively limited throughout the system. If there are more hits than are displayed, notice is given that you should specify the search criteria more precisely.

### Related topics:

[Expanding the structure](#)

### Subsequent pages:

- [Displaying search results](#)
- [Context menus for results list](#)
- [Reloading from TAIS](#)
- [Reloading by drawing reference](#)
- [Modification results list](#)
- [Managing display profiles](#)

## Displaying search results

The search results display comprises the following three display areas.

- Message area
- Toolbar
- Results list

Status	Part number	Name (ger)	ZI	DP	A	DF	Doc. type	Comment	Doc. ma
	S0000L7	PRODUKTLINIE LK	A	1	A	ST	PACKAG		KONZ
	0350894	LK VIRTUELLE GESAMTFAHRZEUGE	A	1	A	ST	PACKAG		KONZ
	0350895	AKTUELLER DOKUMENTATIONSSTAND	A	1	A	ST	PACKAG		KONZ
	PD04797	F20 PROJEKT VIRT. GESAMTFAHRZEUG	A	1	A	ST	PACKAG		KONZ
	PD04802	F30 PROJEKT VIRT. GESAMTFAHRZEUG	A	1	A	ST	PACKAG		KONZ
	PP62385	FB INTERNE SNAPSHOTS	A	1	A	ST	PACKAG	F30 FBEX INTERNE S	KONZ
	P269721	F30 BBG SNAPSHOT VOM 25.01.2011	A	1	A	ST	PACKAG		KONZ
	P280046	F30 YB66 SNAPSHOT VOM 28.01.2011	A	1	A	ST	PACKAG		KONZ
	P2N8959	F30 07/2014 SNAPSHOT KO-ABS. 28.04.2011	A	1	A	ST	PACKAG		KONZ
	P203170	F30 YB67 SNAPSHOT VOM 03.05.2011	A	1	A	ST	PACKAG		KONZ

All functions for result list data manipulation can be found on the toolbar or context menu

- **Toolbar** functions in the form of icons, text fields and buttons may be used on every row of the results list
- **Context menu** functions may be used on one or more selected rows.

## Message area

1 search results found (replacing search) Search for: <b>Document</b> , Master data: <b>All</b> , Part number: <b>S0000L7</b>
--

The area at the upper section of the dialog is automatically expanded when a message is displayed. Success and error messages are presented here along with processing information if applicable. Criteria from the previous search are also displayed here in the form of a list of names separated by commas and value pairs separated by colons. A scrollbar appears in the case of long messages. The button with the two arrows expands and collapses the area. New messages overwrite older ones.

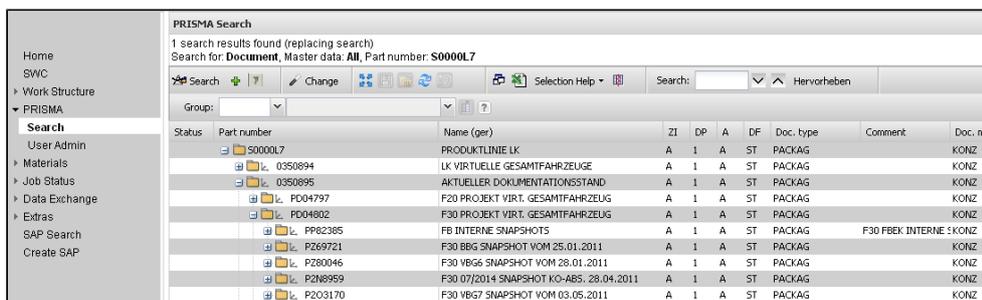
## Toolbar

The toolbar functions affecting the rows of the search results list have a tooltip that describes the functionality of the corresponding function.

Function	Toolbar Button/Field	Description
PRISMA Searches		Opens the search dialog.
Create...		Opens the pop-up dialog for creating an object.
Document quick create		Opens the quick document creation dialog.
Edit/Show		Changes between edit and display mode.
Full screen mode		Switches the full screen mode on or off.
PDMView		Starts a PDMView session. This is only available for users of the external portal.

Save		Save.
Reload from TAIS		Data missing from TAIS is reloaded. This function is only active if TAIS attributes are displayed.
Refresh		The results table is refreshed row by row by reloading the data from the database; new children are added to the rows or children that no longer exist are removed.
Reset		Unsaved changes are reset.
Display Profiles		The display profile management function is started.
Excel Export		Exports the current view to an Excel file.
Global Selection Help		Menu with functions for selecting items from the results list.
Hide empty attribute columns		Empty attribute columns are hidden.
Search		Search in the results list according to a search term.
Search downwards		Search downwards for a term in the results list.
Search upwards		Search upwards for a term in the results list.
Highlight		Instances of the specified search text are marked in the results list.
Group		Select the attribute groups for master data/versions/documents.
Attribute		List of attributes belonging to the selected group.
Add column		Show selected attribute as a new column.
Help		Online help for PRISMA WebClient.

## Results list



Status	Part number	Name (ger)	ZI	DP	A	DF	Doc. type	Comment	Doc. ma
	S0000L7	PRODUKTLINIE LK	A	1	A	ST	PACKAG		KONZ
	0350894	LK VIRTUELLE GESAMTFAHRZEUGE	A	1	A	ST	PACKAG		KONZ
	0350895	AKTUELLER DOKUMENTATIONSTAND	A	1	A	ST	PACKAG		KONZ
	PD04797	F20 PROJEKT WIRT. GESAMTFAHRZEUG	A	1	A	ST	PACKAG		KONZ
	PD04802	F30 PROJEKT WIRT. GESAMTFAHRZEUG	A	1	A	ST	PACKAG		KONZ
	PP62385	FB INTERNE SNAPSHOTS	A	1	A	ST	PACKAG	F30 FBK INTERNE	KONZ
	P269721	F30 B66 SNAPSHOT WOM 25.01.2011	A	1	A	ST	PACKAG		KONZ
	P280046	F30 B66 SNAPSHOT WOM 28.01.2011	A	1	A	ST	PACKAG		KONZ
	P208959	F30 07/2014 SNAPSHOT KO-ABS. 28.04.2011	A	1	A	ST	PACKAG		KONZ
	P203170	F30 B67 SNAPSHOT WOM 03.05.2011	A	1	A	ST	PACKAG		KONZ

A results list is a tree-type table (TableGrid). It is characterized in that a tree is shown in a table column that can be expanded and collapsed. If a node of the tree is expanded and its children displayed, the table is extended by one row for each of the children.

The symbols in the part number column are explained as follows:

-  - Master record for a component or tool with a PRISMA or TAIS/BEMI-part number
-  - Version of the component or tool
-  - Structure document without position information
-  - Integrated structure document (ST,5Y) with unit matrix at zero position
-  - Positioned structure document (5Y)
-  - Document without position information
-  - Integrated document with unit matrix at zero position
-  - Positioned document

The first column is empty in display mode and is used in edit mode to display the row status in the form of a symbol. Symbols have a tooltip. The Status and Part number columns are locked – i.e., they cannot be moved. The column widths can be changed.

Toggle between the results list's edit and display modes with the " 

" button on the toolbar.

The results list appears in display mode after a successful search. Edit mode allows the entry and alteration of object data.

The results list is sorted by default by tree column (part number column) and, depending on the object type, according to the following object attributes:

- **Master data:** Part no. - ascending
- **Version: ZI** - descending
- **Document:** Part, alternative, format - ascending in each case

The results list is displayed with a standard number of columns and standard layout. The scope and layout can be specified in advance by the system or by means of the [display profile](#) defined by the user.

[Control options](#) for the display allow the following:

- Sorting of the current contents of the results list according to a column
- Columns to be added
- Selected columns to be removed from the display
- All empty columns to be removed from the display
- Columns in the display to be grouped differently
- Column widths in the display to be increased or reduced (also in edit mode)

The display is controlled using a dropdown menu offered in the column header.

A current column configuration can be saved as a display profile and re-used.

The toolbar icon "

" refreshes the display and new children are added or deleted children are removed. An existing selection is cancelled. If the results list is in edit mode, this mode will be exited. The expansion state of the tree column remains intact.

Clicking with the right mouse button on one or more selected rows of the results list opens [context menu functions](#) that apply to the object type (master data, versions and documents of parts and tools) to edit data of the type.

## Expanding the structure

The results of a search are always collapsed initially – i.e., the result is first displayed as a list that can be expanded if there are elements on lower levels. When expanding the results, the database is queried and a waiting dialog opens.

### Expanding a column tree

All nodes of a tree (part numbers, versions and structure documents) offer a button for expanding the corresponding node. No check is carried out before expanding a node as to whether there are subsequent nodes. If a node is expanded and there are no child elements, the button is removed from the display.

### Expanding root nodes completely

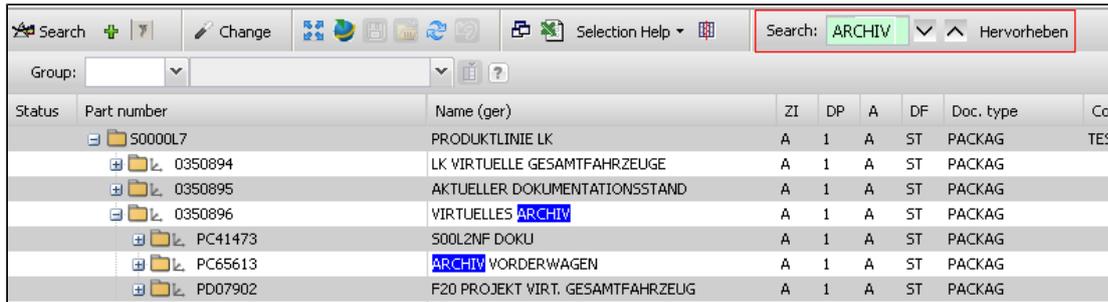
The context menu function "Expand completely" fully expands the tree belonging to the selected root node. The progress indication shown during expansion of the structure provides information on the data found and allows the user to cancel the expansion. All elements that have been found up to the point of cancellation are shown.

## Removing Trees from Lists

The context menu item **Remove Tree from List** removes the entire tree containing a selected object from the display in the search results list. If unsaved changes apply, the security confirmation query is first displayed. You can select multiple objects.

## Searching and Highlighting in the Results List

You can search and highlight results in both display and edit mode. The toolbar provides a text input field, in which you can enter a search term.



Searches only consider columns containing text. No distinction is made between upper- and lowercase spelling during the search in the results list. You must look for search hits and highlighting within the displayed tree nodes. The tree is not automatically expanded. The text input field has a green background if hits are found for the specified term. If no matches are found, the text input field is marked red.

- [Searching](#)
- [Highlighting](#)

### Searching

The toolbar provides two buttons with an arrow symbol. You can use these buttons to navigate forwards and backwards to the next result starting from the first row of search hits. The current hit in each case is highlighted, even if the results list is in edit mode.

### Highlighting

The "Highlight" button on the toolbar marks all search hits with white lettering against a blue background. The marking remains in place until the next search is performed.

## Context menus for results list

The context menu for the results list contains a menu item for the object types master data, version, document and structure with a submenu for editing the objects of the type.

- [Master Data Submenu](#)
- [Version Submenu](#)
- [Document Submenu](#)
- [Structures Submenu](#)
- [Selection Help Submenu](#)

The following items on the context menu apply equally to all object types:

Context menu item	Description

Resetting Changes	Resets all unsaved changes to selected objects.
Continue navigation	A selected object, or the topmost object in a multiple selection within a hierarchy, becomes the root node. Trees without a selected object are removed.
Deleting Tree from List	Removes trees with the selected object.
Expand Completely	Expands trees of selected objects.
Selection Help	Opens a pop-up menu for selection help.

## Master Data Submenu

Context menu item	Description
Show/Edit	Opens a pop-up dialog for showing and editing master data.
Delete	Removes master data records from the results list and database.
Drawing References	Shows master data records that refer with the field "See part no." to the selected master data record.
Data from TAIS	Shows data from TAIS.
PRISMA Part No. to TAIS/BEMI	Assign versions of a PRISMA master data record to a TAIS/BEMI master data record.

## Version Submenu

Context menu item	Description
Show/Edit...	Opens a pop-up dialog for showing and editing versions (Ctrl+Alt+V).
Edit Material	
Delete	Removes versions from the results list and database.
Create...	Opens a pop-up dialog to create a new version.
Change Creator	Opens a pop-up menu for changing the author of a version with or without documents.
Report for Release ...	Opens a pop-up dialog for reporting versions as ready for release (Ctrl+Alt+F).
Release Announcement	Opens a pop-up dialog for announcing the release of versions.
Release Status	Opens the dialog for the release status
Downgrade Maturity	Opens a dialog restore the maturity of a version.
DZA	Opens the DZA (digital drawing archive) in the B2B portal to display the drawings for the selected version.
Verifications	Opens a pop-up dialog to verify versions.

## Document Submenu

Context menu item	Description
Show/Edit	Opens a pop-up dialog for showing and editing documents (Ctrl+Alt+D).
Delete	Removes documents from the results list and database.
Create...	Opens a pop-up dialog to create a new document.
Change Creator	Opens a pop-up dialog to change the author of documents.
Ready for Release	Opens a pop-up dialog to report documents as ready for release.

SE-Team Rights	Opens a pop-up dialog for assigning SE team rights.
Load Source-AS	Opens a window with the CAD PDM work structure of the document.
Download file	Saves the file belonging to the document on the local PC; applies only to documents with a model
Upload file	Opens a dialog to import a file. Not available for documents of format AS, ST, SL and MA
Data Exchange	Opens a pop-up dialog to send documents.
Download ZKUTIL XML file	Saves the header of a 5D document as a ZKUTIL XML file on the local PC in order to be able to visualize it.
Convert	Opens a pop-up menu with conversion options for documents.
Where Used...	Opens a pop-up menu to determine usage of the document.
New Visualization	Displays models belonging to the documents in a viewer. Only available to internal company users.
Add Visualization	Extends a visualization by additional models.

## Structures Submenu

Context menu item	Description
Show/Edit	Opens a pop-up dialog for showing and editing instances.
Copy Instance	Copies documents and instances to the clipboard.
Remove Instances	Removes instances from a structure.
Insert Instances	Opens a pop-up menu for adding instances and documents.
Replace Instances	Opens a pop-up menu for replacing the referenced document.
Neighborhood Search	Opens a pop-up dialog for performing a neighborhood search for parts.
Visualize Structure – New	Shows the structure document in a viewer (Ctrl+Alt+N).
Visualize Structure – Add	Extends a visualization by another structure document (Ctrl+Alt+H).

## Selection Help Submenu

Context menu item	Description
by search criteria ...	Opens a pop-up dialog for entering selection criteria
Select All Instances	Selects all instances of an ST or 5Y document.

## Reloading from TAIS

Columns in the [results list](#) with attributes that can be loaded from TAIS (for management of parts' master data) are initially filled in with "n/a" after a search. The values of TAIS attributes of official part numbers can be obtained and displayed in the following ways:

- The toolbar button **Reload from TAIS** () applies to all rows of the results list
- The context menu item **Data from TAIS** applies to the selected part number
- "Part Number Creation" or "Show/Edit" dialog of a selected part number

-TAIS	
VirtualCar-relevant	<input type="text"/>
Def.name (ger):	<input type="text"/>
Def.name (eng):	<input type="text"/>
<input type="button" value="Read Values fr&lt;br/&gt;TAIS"/>	

The default entry "n/a" is then replaced by the retrieved values. A TAIS attribute is also replaced if it is already assigned a value from PRISMA as the value has been updated there.

## Reloading by drawing reference

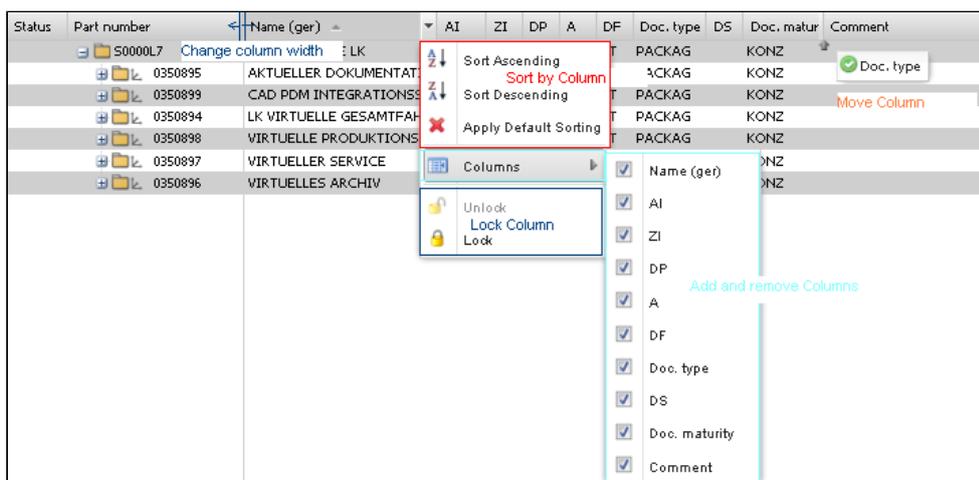
The context secondary menu item **Drawing References** for a selected master data record finds all master data records referring to the selected master data record by means of the field "See part no." The located master data records are added to the displayed data. The number of master data records added is shown in the message area of the results display.

## Modification results list

Control elements on the toolbar for the display of the results and the column menu for the **results list** enable you to adjust the display of the results list as follows:

- Sort by column
- Add column
- Lock column
- Hide column
- Move column
- Change column width

A left mouseclick on the arrow to the right of a column header opens the following column menu for control of the display of the results list:

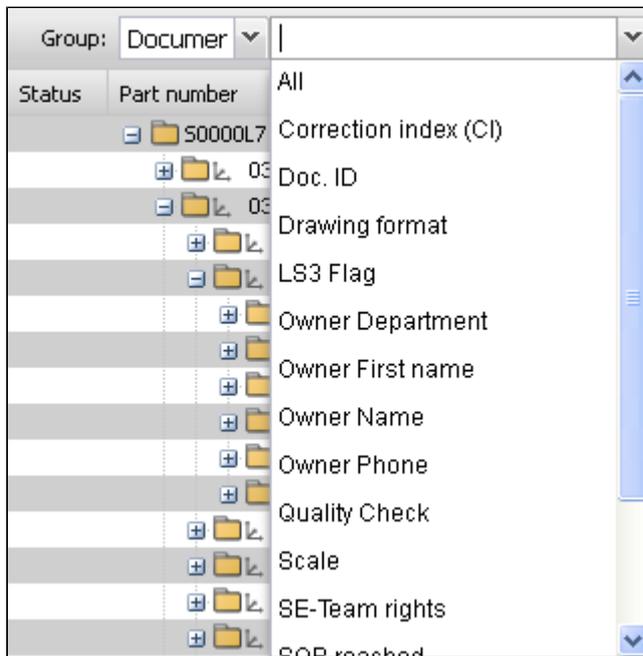


## Sort by column

The list is sorted by part number column by default. Sorting is carried out by means of the column menu in either ascending or descending order. Sorted columns are marked with an arrow symbol in the column header. The symbol shows the sorting order. Clicking with the mouse on the column header changes

the configured sorting order. The tree hierarchy is retained when sorting by column; sorting in the tree is by level. The "Use standard sorting" menu item cancels an existing sorting configuration and standard sorting for the part number column is applied.

## Add column



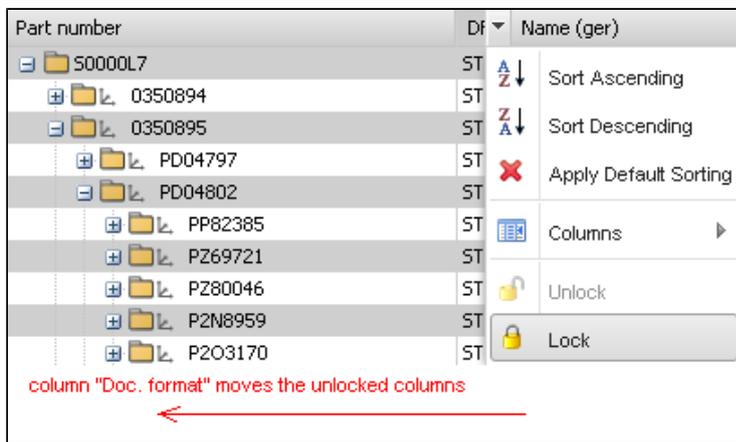
You add columns to the results list using the control elements on the toolbar. The Group selection list on the toolbar offers the attribute groups of document, info, instance, master data and version. After selecting an attribute group, the list of attributes belonging to the selected group that have not yet been displayed in the results list are activated (standard column number). The toolbar button  adds the selected attributes as columns at the end of the current column list. If multiple attribute groups are selected, individual attributes cannot be selected. In this case, all columns of all selected groups are added to the results list, sorted by group.

The following columns of the results list can be added to the attribute groups stated in the column header:

Master data	Version	Document	Instance	Info
1st type	AI	Owner department	Name of instance	History
Name (Eng.)	Number of L-Kz.	Owner name	Trafo	Checks
CH	AV handover	Owner tel.		Specifications
Replacement for	Preferred alt.	Owner first name		
ESD	Preferred doc. type	Valid		
FMC4	Doc. ID	Correction index (CI)		
Secret project	Duplicate no.	LS3 flag		
Main TA	Constant weight	Scale		
Tool/part identifier	Physical change	Test certificate		
Short name	Module	Date written		
L-Kz	Module group	SE team rights		
L/R-Kz.	NEAL	SOP reached		
Delivery part no.	Project (version)	Status		
Delivery part no. name	Prototype maturity	Drawing format		
Supplier	Recycling class			
Engine	TA/exhibition data			

Project (part)	Vers. owner department
Raw part no.	Vers. owner name
Part no.	Vers. owner first name
Part no. type	Version ID
Protection	Change type
See part no.	
Standard name (Ger.)	
Standard name (Eng.)	
Part type	
Part ID	
VC	

## Lock column



Locked columns remain in the visible screen area during horizontal scrolling – i.e., they are not scrolled.

You move a column left to the group of locked columns with the column menu item **Lock**. The column is placed to the right of the group.

The column menu item **Unlock** cancels the locking for a column and moves the unlocked column left to the right group of columns that can be scrolled.

## Hide column

The following types of column can be hidden:

- Columns that are not needed
- Empty columns

The column menu item **Columns** displays a pop-up list of columns that can be shown or hidden using a switch before their list entry. If an unlocked column is selected, the pop-up list contains all active columns, otherwise only locked columns. Status and part number columns cannot be hidden.

All empty columns can be deleted from the results list with the toolbar icon .

## Move column

ZI	DF	DP	A	Doc. type	Comment	Doc. maturity	Materials
A	ST	1	A	PACKAG		KONZ	Nein
A	ST	1	A	PACKAG	DF	KONZ	Nein
A	ST	1	A	PACKAG		KONZ	Nein

Columns can be interchanged by using "drag&drop" on the column header. The position of the column is visualized while it is being dragged and also whether the position is permitted. Columns dragged into the locked area are also locked. Columns that are dragged out of the locked area are unlocked. Column groups (indicated by a two-row column header) can only be moved in groups. Columns in a column group can only be moved within the group.

## Change column width

Part number	Name (ger)	ZI	DP	A	DF	DS	Doc. type	Doc. ma
S0000L7	PRODUKTLINIE LK	A	1	A	ST		PACKAG	KONZ
0350895	AKTUELLER DOKUMENTATIONSST	A	1	A	ST		PACKAG	KONZ
0350899	CAD PDM INTEGRATIONSSTRUKTU	A	1	A	ST		PACKAG	KONZ
0350894	LK VIRTUELLE GESAMTFAHRZEUGI	A	1	A	ST		PACKAG	KONZ
0350898	VIRTUELLE PRODUKTIONSTECHNI	A	1	A	ST		PACKAG	KONZ
0350897	VIRTUELLER SERVICE	A	1	A	ST		PACKAG	KONZ
0350896	VIRTUELLES ARCHIV	A	1	A	ST		PACKAG	KONZ

You click with the left mouse button on the edge of the column header and drag the margin while holding down the mouse button to change the width of the column. Once you release the mouse button, the column is set to the last shown width. The minimum width of any column is 40 pixels.

## Managing display profiles

A user can manage different column configurations in the form of display profiles in the database. A display profile is given a name. The profile contains the following information:

- Visibility of the column
- Position of the column
- Column width
- Lock status

A dialog is provided for management of the profiles. The dialog can be opened using the toolbar button .

**Manage display profiles** ? X

Profile name	Description	Public	Default
Default	Default f. PRISMA Grid	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Visu	Standard für Visualisierung	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Name:

Description:

Public:

Each user has exactly one standard column profile. That profile is activated when the PRISMA web client is started. The current standard profile is marked in the management dialog with a checkmark in the "Standard" column. The profile is set by default with

the name "DEFAULT" for new users.

A display profile can have the property "public". Public profiles are visible and selectable for all users. Users require the role VOB in order to be able to create and edit a public profile.

A profile selected in the management dialog can be set as the standard profile, used for the column layout in the results list or deleted.

To save the current column layout as a profile in the results list, you must first assign a name and then press the **Save** button.

## Creating data

- [Part Number Creation](#)
- [Creating a New Version or Document](#)
- [Quick Document Creation](#)

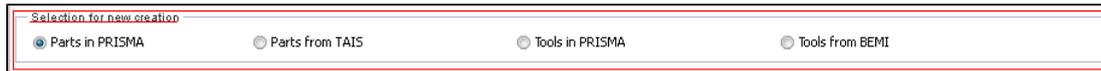
Basic structure of the dialog for creating master data and/or version and/or document. Opened using the icon on the toolbar "+" of the search results dialog:

### Part Number Creation

Part numbers can be created in any of the four following ways:

- Parts in PRISMA
- Parts from TAIS
- Tools in PRISMA
- Tools from BEMI

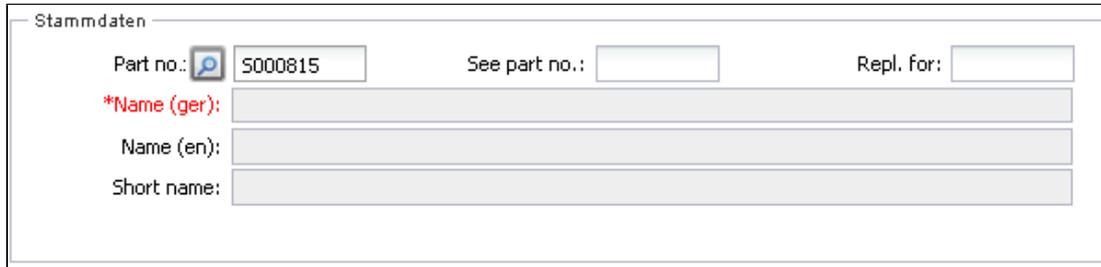
The type of part number creation is controlled using radio buttons at the top of the dialog window. The input fields and tabs are adapted according to the selection made.



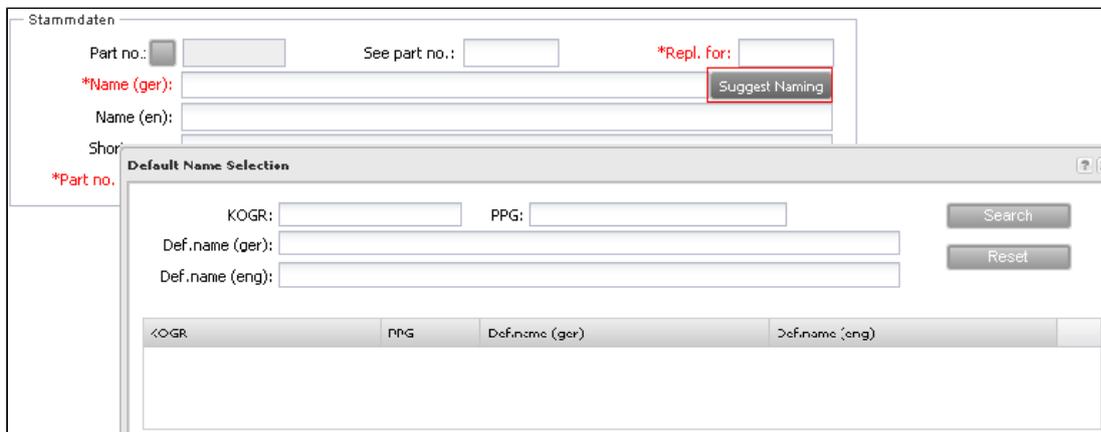
You can also create a version and a document together with a master data record in the Part Number Creation dialog.

Mandatory fields are marked with a red asterisk and name in red.

When creating "Parts from TAIS" or "Tools from BEMI", a search is carried out in TAIS or BEMI for the part number entered in the "Part no." field. The part number and all other master data are adopted directly from TAIS/BEMI. Data obtained from BEMI can be changed, but data from TAIS cannot be altered.



When creating "Parts in PRISMA", the default name is defined using a selection dialog.



Basically the direct predecessor part number has to be maintained with the creation of a new part number to make the change information transparent.

Direct predecessor part number means: the predecessor part number will be replaced with a newly created part number.

- When changing the supplier of the part number, triggered by M-ressort
- Regardless of whether the direct predecessor is still valid or not
- Regardless of whether the direct predecessor is only type-related or general predecessor
- Although the part number is technically not interchangeable
  - The field "Ersatz für" (=replace for) is filled only with "new" when the component / function was previously not available in the vehicle. In case of several predecessors:
- If multiple parts are summarized in one part, please select together with the developer the part number with the highest value
- If there are multiple predecessor, please select the predecessor part number of the lead derivative.

Unable to render embedded object: File (sdt-ersatz.PNG) not found.

The **Create** button adds new data (master data, version, document) as a list on one level to the [results list](#) and closes the dialog.

### Creating a New Version or Document

You can create a new version for an existing part number, or a new document for a version.

The submenu function **New Version** for the context menu item "Version" or "Create" for the context menu item "Document" opens a dialog for creating a new version or document respectively. Data fields for the current part number or version are already filled in and cannot be changed.

Mandatory fields are marked with a red asterisk and name in red.

For a new version, entering a plus sign (+) in the field "ZI" causes the highest current drawing index to be used.

If the option "SE-Team rights" is set for a new document, the dialog for the user search and assignment of SE team rights opens after creating the data.

### Quick Document Creation

You open the dialog "Document quick create" by clicking the icon on the toolbar "🔍" of the search results list.

Master data, a version and a document are always created with the "Document quick create" dialog.

This dialog represents an alternative version of the dialog for standard creation, but is reduced to the relevant mandatory fields and has no tabs. Just as for the dialog for creating a part number (see above), the layout of the master version, version and document areas varies according to the creation type you select.

Mandatory fields are marked with a red asterisk and name in red.

The data fields "Doc. part" and "Alternative" in the Document dialog section are preset and cannot be changed.

When creating "Parts in PRISMA" and "Parts from TAIS" with the option **Create release document** selected, the value FRGMOD is automatically entered in the "Doc. type" field and the "Doc. format" field disappears. The "Doc. type" cannot be changed.

For the creation option "Tools in PRISMA", the value "FMREF" is automatically entered in the "Doc. type" field and the value "ST" in the "Doc. format" field if the **create as T-Gate Node** option is selected.

## Selecting data

- Row and Cell Selection in Results Lists
- Global Selection Help
- Context Menu Item: Selection Help

### Row and Cell Selection in Results Lists

The standard methods of row selection of consecutive rows using the shift key and selection of individual rows using the control key (Ctrl) can be applied. A selection made using the Ctrl key is shown below. Rows can only be selected using the tree column.

Status	Part number	me (ger)	DF	ZI	DP	A	Doc. type	Comment	Doc. maturity	Materials
	S0000L7	PRODUKTLINIE LK	ST	A	1	A	PACKAG		KONZ	Nein
	0350894	VIRTUELLE GESAMTFAHRZEUGE	ST	A	1	A	PACKAG		KONZ	Nein
	0348910	PROJEKT VIRT. GESAMTFAHRZEUG	ST	A	1	A	PACKAG		KONZ	Nein
	P3E7768	KSP	ST	A	1	A	PACKAG		KONZ	Nein
	0349010	VPBG	ST	C	1	A	PACKAG		KONZ	Nein
	0349025	PUMA 03/2014	ST	A	1	A	PACKAG		KONZ	Nein
	0349028	PUMA 07/2012 - 06/2013	ST	A	1	A	PACKAG		KONZ	Nein
	0348920	PROJEKT VIRT. GESAMTFAHRZEUG	ST	A	1	A	PACKAG		KONZ	Nein
	0348921	PROJEKT VIRT. GESAMTFAHRZEUG	ST	A	1	A	PACKAG		KONZ	Nein
	0349020	VBG7	ST	A	1	A	PACKAG		KONZ	Nein
	0350409	PVL	ST	A	1	A	PACKAG		KONZ	Nein
	0350413	PVL + PULK2	ST	A	1	A	PACKAG		KONZ	Nein
	0350459	VS1	ST	A	1	A	PACKAG		KONZ	Nein

You can select a cell from the results list by clicking it with the mouse. You can only select one cell at a time. See the image below. You can copy cell contents to the clipboard with Ctrl+C.

S0000L7	PRODUKTLINIE LK	ST	A	1	A	PACKAG
0350894	LK VIRTUELLE GESAMTFAHRZEUGE	ST	A	1	A	PACKAG
0348910	F20 PROJEKT VIRT. GESAMTFAHRZEUG	ST	A	1	A	PACKAG
P3E7768	F20 KSP	ST	A	1	A	PACKAG
4848063	F20 KSP FBEA	ST	A	1	A	PACKAG
0349010	F20 VPBG	ST	C	1	A	PACKAG
0349025	F20 PUMA 03/2014	ST	A	1	A	PACKAG

Row and cell selection are optically distinguished using different coloring of the marked cells.

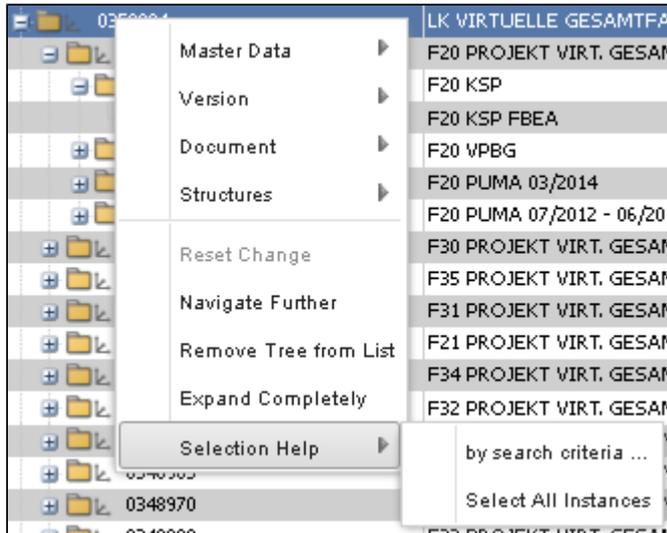
### Global Selection Help

The **Selection Help** button on the toolbar in the results display offers a dropdown menu for global selection in preparation for efficient reporting of versions and documents as ready for release and for mass editing for management in the results list of selected data.

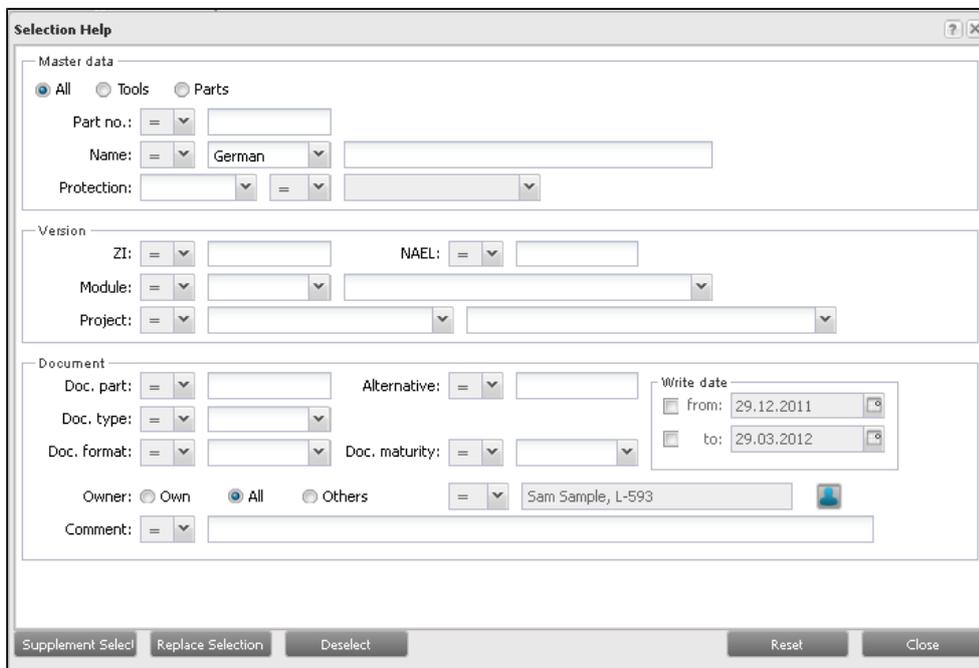
- The menu function **All Versions** is used to select only the versions that are expanded in the results list.
- The menu function **All Versions and Release Documents** loads the documents for all expanded versions, expands the documents and selects the original documents with the type FRGMOD. If a version contains a 5Y document, it is also expanded to one level. ST documents are not expanded any further. If a release document is available as a document and instance, only the instance is selected.
- The menu function **All Release Documents** loads the documents for all displayed versions, expands the documents and selects the original documents with the type FRGMOD. The 5Y document of a version is expanded, but the ST document is not. If a release document is available as a document and instance, the instance is selected.

### Context Menu Item: Selection Help

The context menu item **Selection Help** opens a pop-up menu.



The submenu function **by search criteria ...** belonging to the context menu item **Selection Help** of the results list shows the Selection Help dialog.



The documents matching the selection criteria entered in the dialog are (un)selected in the results list underneath the clicked row in the results list. Matching documents are expanded.

The use of the search criteria can be restricted by appropriate selection of the search object (All, Tools, Parts).

The wildcard character \* can only be used in a text input field together with text. Each particular search criterion is preceded by a selection list, which can be used to specify whether the number of results is to match (=) the criterion or not (!=).

Matching documents can replace an existing selection, or be added to the selection, or the found documents can be unselected.

The submenu function **Select All Instances** of the context menu item **Selection Help** for the results list is only available for selected ST and 5Y documents. All instances found underneath the clicked ST or 5Y documents in the results list are expanded and selected.

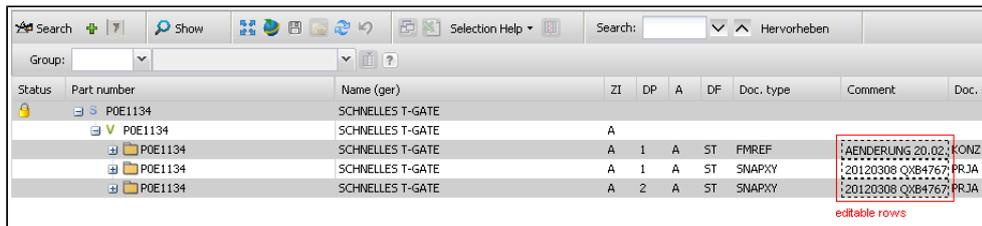
## Editing data

- Editing in the Results List
- Editing Individual Objects
- Editing Multiple Objects

Changed data may be [saved](#) or [reseted](#).

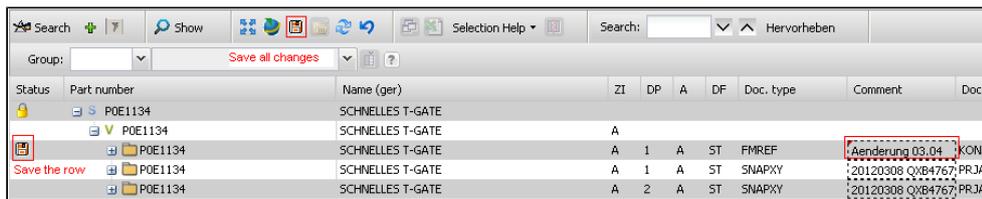
## Editing in the Results List

Upon enabling the edit mode with the icon  on the toolbar, cells are created in the [results list](#) with a narrow outline and white background. Users may edit the cells according to their roles and authorization. The symbol  in the status column indicates a row that cannot be edited.



Status	Part number	Name (ger)	ZI	DP	A	DF	Doc. type	Comment	Doc. n
	P0E1134	SCHNELLES T-GATE							
	P0E1134	SCHNELLES T-GATE	A						
	P0E1134	SCHNELLES T-GATE	A	1	A	ST	FMREF	ÄNDERUNG 20.02.20120308 QXB4767 PRJA	KONZ
	P0E1134	SCHNELLES T-GATE	A	1	A	ST	SNAPXY	20120308 QXB4767 PRJA	
	P0E1134	SCHNELLES T-GATE	A	2	A	ST	SNAPXY	20120308 QXB4767 PRJA	

After a cell has been edited, the diskette icon in the status column indicates that there are changes that have not yet been saved. Clicking the diskette icon saves the changes.



Status	Part number	Name (ger)	ZI	DP	A	DF	Doc. type	Comment	Doc. n
	P0E1134	SCHNELLES T-GATE							
	P0E1134	SCHNELLES T-GATE	A						
	P0E1134	SCHNELLES T-GATE	A	1	A	ST	FMREF	Änderung 03.04.20120308 QXB4767 PRJA	KONZ
	P0E1134	SCHNELLES T-GATE	A	1	A	ST	SNAPXY	20120308 QXB4767 PRJA	
	P0E1134	SCHNELLES T-GATE	A	2	A	ST	SNAPXY	20120308 QXB4767 PRJA	

A green checkmark in the status column then indicates successful saving of the data.

The context menu item **Show/Edit** for one or more rows selected in the results list opens the dialog for showing or editing the data associated with the selected object or objects.

## Editing Individual Objects

The context menu item **Show/Edit** for a row selected in the results list opens the dialog for showing or editing the data associated with the selected object.

The title of the dialog shows what object is currently being edited. Depending on the object type (master data, version, document or instance) and the type of part number (part or tool), the fields in the header parts and the dialog tabs that can be edited are adapted accordingly. This means that the tabs and headers for master data and versions are displayed with write protection in the case of documents.

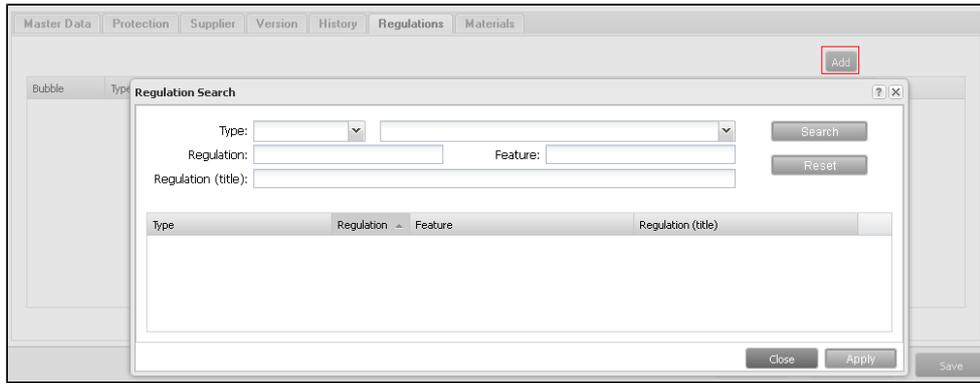
The characteristics of a number of tabs are shown below.

Data can be reloaded from TAIS on the "Master data" tab for the version of a part.

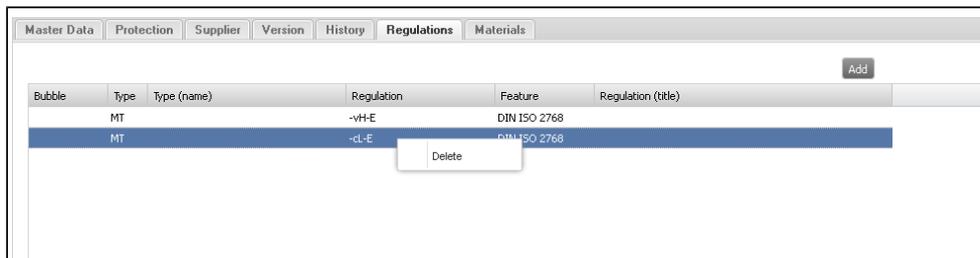
The supplier for a part number can be found using a search dialog on the "Supplier" tab.

The abbreviated name of a part (German/English) is only displayed in some cases on the "History" tab for a version of the part. By clicking the description the entire text is displayed in a separate text field, where it can be edited.

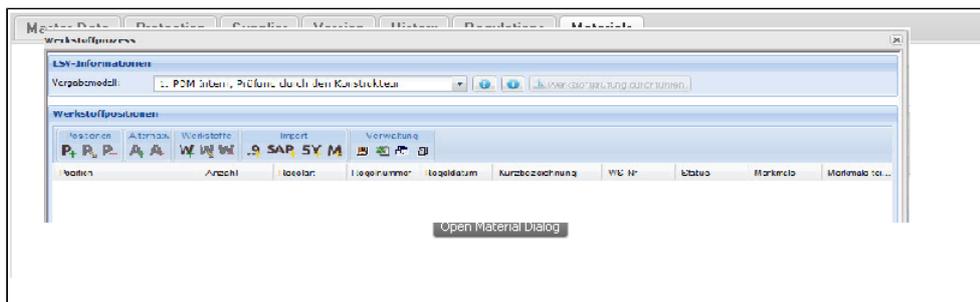
The rule(s) regarding the version of a part can be added using a search dialog.



A selected rule can be deleted with a context menu function on the "Rules" tab.



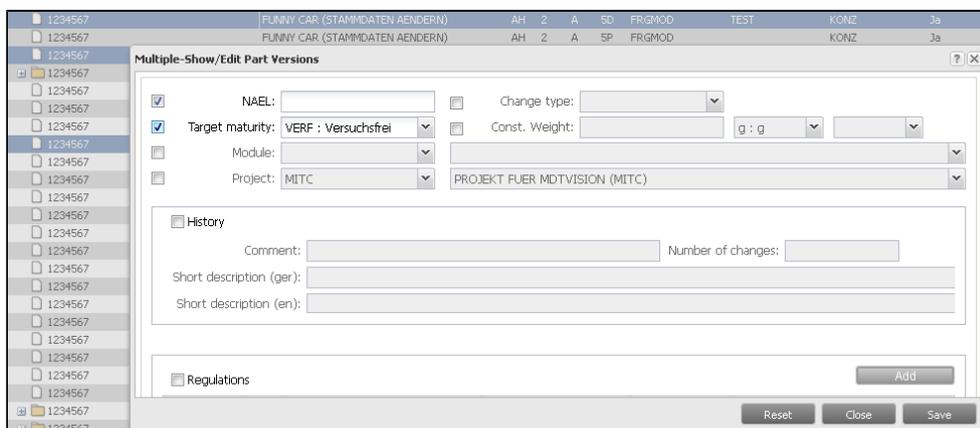
The "Materials process" dialog can be displayed on the Materials tab for a version of a part in order to manage the material entries for the version.



## Editing Multiple Objects

Only multiply selected objects for a part number type can be edited simultaneously – either parts only or tools only. An error message is displayed otherwise.

The fields that can be edited for the selected object types (master data, versions or documents) are presented with a preceding checkbox. If you select the checkbox, the entry for the corresponding field is activated.



The rules for the version of a part cannot be deleted. Otherwise, the same conditions as for editing a single object apply.

## Resetting and saving data

- [Resetting Data](#)
- [Saving Data](#)

### Resetting Data

All changes in the [results list](#) that have not been saved are rejected by pressing the toolbar button " " in the results display. The button is only active and colored blue if there are changes that have not been saved.

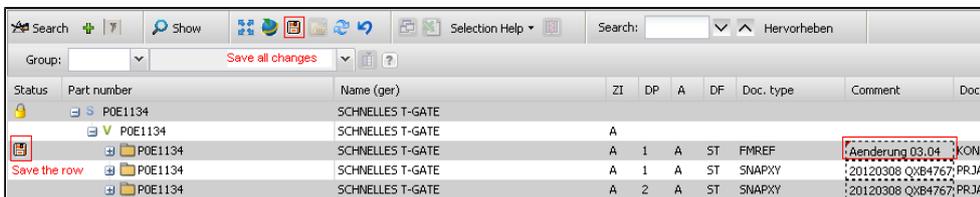
**Current** changes made to one or more objects in the dialog "Show/Edit" are reset to their original status by pressing the button **Reset**. The dialog remains open.

The context menu item **Reset changes** resets all changes that have not yet been saved in the **current selection** row by row. The context menu item is only active if there are changes that have not yet been saved.

Resetting of data must be acknowledged by replying to a confirmation query. The confirmation query is also shown if unsaved changes could be lost due to a user action.

### Saving Data

Modified data can be saved either row by row or globally.



Status	Part number	Name (ger)	ZI	DP	A	DF	Doc. type	Comment	Doc.
	P0E1134	SCHNELLES T-GATE							
	P0E1134	SCHNELLES T-GATE	A						
	P0E1134	SCHNELLES T-GATE	A	1	A	ST	FMREF	Aenderung 03,04	KONZ
	P0E1134	SCHNELLES T-GATE	A	1	A	ST	SNAPXY	20120308 QXB4767;PRJA	
	P0E1134	SCHNELLES T-GATE	A	2	A	ST	SNAPXY	20120308 QXB4767;PRJA	

A disk icon appears in the status column of a row in the [results list](#) if the row contains unsaved changes. Clicking the icon saves the data record shown in the row.

The toolbar button " " in the results display saves **all** changes in the [results list](#). The button is only active in edit mode and is colored red if there are changes that have not been saved. If an error occurs during saving, the row is skipped and the process continues with the next row.

A green checkmark in the status column indicates a successfully saved row, while a red cross () marks an error. Clicking a red cross opens an error message.

In the case of conflicting changes in a row, the change that was last made takes effect or the row is marked as faulty and is not saved.

Related topics:

[Edit Data](#)

## Exporting data to Excel

The toolbar icon  starts the export of the current contents of the **results** list to an Excel file named "prismaexport-**<date-timestamp>**.xls". The results display must be in display mode. Clicking the toolbar icon  activates the display mode. Depending on the configuration of the browser, the data can be stored on the local hard disk or directly displayed in Excel.



The visibility of the rows and columns is similar to the display in the results list – i.e., the expansion level and number of columns remain unchanged.

	A	B	C	D	E	
1	Part number	Name (ger)	Design index	Doc. part	Alternative	Doc.
2	S0000L7	PRODUKTLINIE LK	A	1	A	ST
3	0350894	LK VIRTUELLE GESAMTFAHRZEUGE	A	1	A	ST
4	0348910	F20 PROJEKT VIRT. GESAMTFAHRZEUG	A	1	A	ST
5	0348920	F30 PROJEKT VIRT. GESAMTFAHRZEUG	A	1	A	ST
6	0348921	F35 PROJEKT VIRT. GESAMTFAHRZEUG	A	1	A	ST
7	0348930	F31 PROJEKT VIRT. GESAMTFAHRZEUG	A	1	A	ST
8	0348941	F34 PROJEKT VIRT. GESAMTFAHRZEUG	A	1	A	ST
9	0348950	F32 PROJEKT VIRT. GESAMTFAHRZEUG	A	1	A	ST

## Drag & Drop for Data

An object (document, instance, structure document or structure instance) in the tree can be dragged onto another target object in the tree. The object is copied.

You begin dragging an object by clicking and holding an existing row selection. You can move (drag) the object while pressing the left mouse button. Releasing the mouse button opens a context menu for replacing or adding the object.

Errors are displayed in the status column of the source object.

The selection and insertion of objects is displayed in summary below.

- Dragging single objects
- Dragging structures

### Dragging single objects

PA28141	FOX MODUL34 RDS BVA SENSOREN VA	A	1	B	ST	PACKAG
P731432	FEDERBEIN-STOSSD. VA VDC2 F10 2WD	B	2	B	CA	BMB
P731432	FEDERBEIN-STOSSD. VA VDC2 F10 2WD	B	2	B	5P	FRGMOD
P747945	BREMSLEITUNGEN EHB PL6	Q	22	A	CA	BMB
P747945	BREMSLEITUNGEN EHB PL6	Q	22	A	5P	FRGMOD
1163565	BREMSSCHLAUCH-HALTEFEDER	C	1	A	CA	BMB
4039547	RGB F10 VA	C	1	A	CA	BMD
4041421	ZB LI FAUSTAATTEL FNR-AL60-36-374 M.BEL	A	2	B	CA	BMB

2 Instances selected

DXB4767	DATENAUSTAUSCH	A	1	A	ST	FRGMOD
PD41466	BAURAUM	A	1	A	ST	SIMULA
PD41467	BR EXTERIEUR	A	1	A	ST	SIMULA
PD41468	BR INNENRAUM	A	1	A	ST	SIMULA
PD41469	BR MOTORRAUM, POWERTRAIN	A	1	A	ST	SIMULA
target	P731432	FEDERBEIN-STOSSD. VA VDC2 F10 2WD	B	2	B	CA BMB
	1163565	BREMSSCHLAUCH-HALTEFEDER	E	1	A	CA BMB

Add two instances; the position is copied. The position of an instance within a 5Y document is copied in relation to the topmost structure level displayed. The transformation matrices of the individual levels are multiplied. One or more documents can be added in a similar manner.

DXB4767	DATENAUSTAUSCH	A	1	A	ST	FRGMOD
PD41466	BAURAUM	A	1	A	ST	SIMULA
target	P731432	FEDERBEIN-STOSSD. VA VDC2 F10 2WD	B	2	B	CA BMB
source	1163565	BREMSSCHLAUCH-HALTEFEDER	C	1	A	CA BMB
	1163565	BREMSSCHLAUCH-HALTEFEDER	E	1	A	CA BMB
	1163565	BREMSSCHLAUCH-HALTEFEDER	E	1	A	FRGMOD
	1163565	BREMSSCHLAUCH-HALTEFEDER	E	1	A	CG BMB
	1163565	BREMSSCHLAUCH-HALTEFEDER	E	1	A	CG FRGMOD
	1163565	BREMSSCHLAUCH-HALTEFEDER	E	1	A	CL BMB

Drag a document onto an instance. Replaces, for example, one version by a higher version. All identical siblings are replaced with **Replace All Instances**.

### Dragging structures

target	P951357	BR INNENRAUM	A	1	A	ST	SIMULA
		VS-13 TOP - 2,5,6,7 I-TAFEL (VBG4)	A	1	A	ST	PACKAG
		F01 750XIA N63B44ATL 6HP26 LL US	A	1	A	ST	PACKAG
		VS-13 TOP - 3 FENSTERHEBER VORN (VBG4)	A	1	A	ST	PACKAG
	PA33273	PRT F01 750IA N63B44ATL 6HP26 LL ECE	A	1	A	ST	PACKAG
	P847146	VS-13 TOP - 4 FRONTSCHIEBE (VBG4)	A	1	A	ST	PACKAG
	P847148	VS-13 TOP - 9 LEHNENRAHMEN (VBG4)	A	1	A	ST	PACKAG
source	P853764	5121090.TUERSCHLOSS DER VORDERTUER L	A	1	A	ST	SIMULA
	DXB4767	AUSTAUSCH	A	1	A	ST	FRGMOD

Add a structure instance to a structure document. The same applies to the insertion of one or more structure documents.

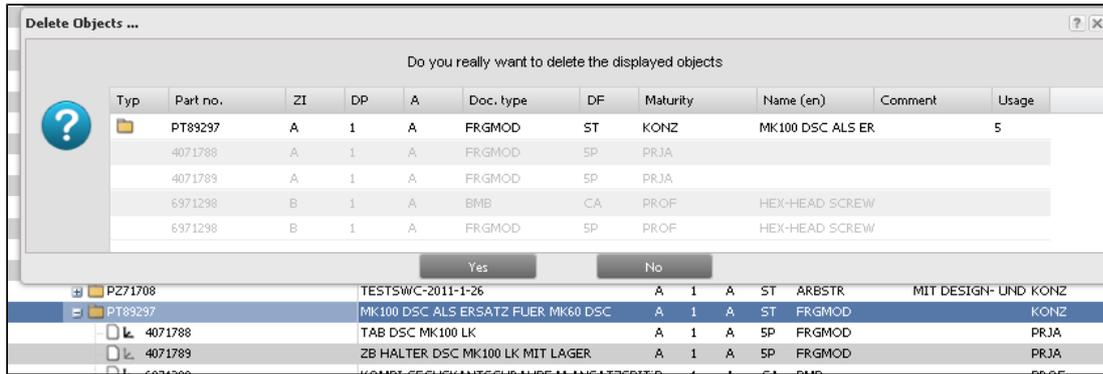
source	P951357	BR INNENRAUM	A	1	A	ST	SIMULA
	P847144	VS-13 TOP - 2,5,6,7 I-TAFEL (VBG4)	A	1	A	ST	PACKAG
	PA35575	F01 750XIA N63B44ATL 6HP26 LL US	A	1	A	ST	PACKAG
	P847145	VS-13 TOP - 3 FENSTERHEBER VORN (VBG4)	A	1	A	ST	PACKAG
target	PA33273	PRT F01 750IA N63B44ATL 6HP26 LL ECE	A	1	A	ST	PACKAG
	P847146	VS-13 TOP - 4 FRONTSCHIEBE (VBG4)	A	1	A	ST	PACKAG
	P847148	VS-13 TOP - 9 LEHNENRAHMEN (VBG4)	A	1	A	ST	PACKAG
	P853764	121090.TUERSCHLOSS DER VORDERTUER L	A	1	A	ST	SIMULA
	DXB4767	DATENAUSTAUSCH	A	1	A	ST	FRGMOD

Drag a structure document onto a structure instance.

### Deleting data

The menu function **Delete** in the context menu **Master Data**, **Version** or **Document** removes selected objects from the results list and from the PRISMA database.

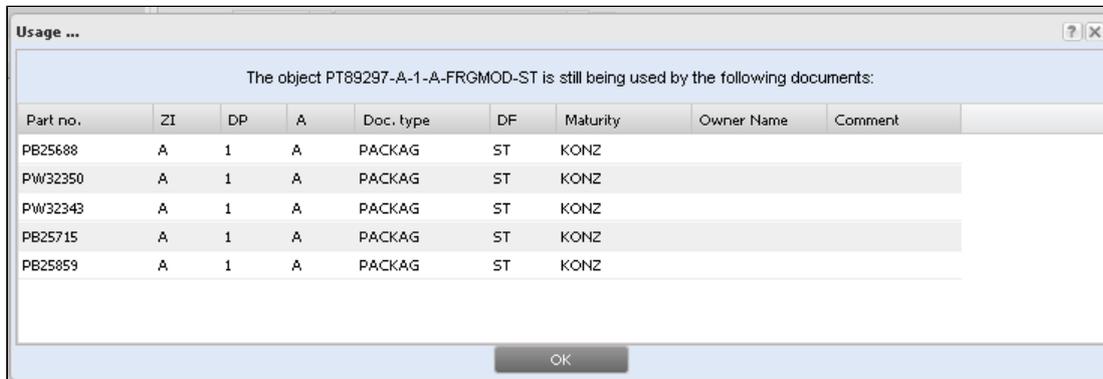
**Master data records** are only deleted provided they do not have any **versions**. A version is deleted along with its assigned documents.



The confirmation prompt lists all objects to be deleted regardless of whether they were displayed or selected in the results list or not.

Objects that do not have the status **KONZ** are disabled (gray) and cannot be deleted.

Clicking the number of uses opens a window in which the documents are listed that use the object to be deleted. Document structures are not deleted recursively.



## Selecting Documents

The **Select Document** dialog can be opened in the **Data Exchange – Import** dialog or with the submenu items **Insert Instance\*** and **\*Replace Instances** from the **Structures** context menu.

**Document Search**

Part no.: PC84854 search criteria

Name: German

ZI:  Highest DI

Project:

Module:

Doc. part:  Alternative:  Doc. type:  Doc. format:

Doc. maturity:

Owner:  Own  All  Others

Part no.	ZI	DP	A	Doc. type	DF	DS	Doc. maturity	Name (en)	Owner
PC84854	A	1	A	BMB	CA	OM	PRJA	EXTREMLAGEN F20	SVEN GERBER, EF-210
PC84854	A	1	A	SOLMOD	CG	OM	PRJA	EXTREMLAGEN F20	SVEN GERBER, EF-210
PC84854	A	1	A	SOLMOD	JT	OM	PRJA	EXTREMLAGEN F20	SVEN GERBER, EF-210
PC84854	A	1	A	FRGMOD	ST		KONZ	EXTREMLAGEN F20	SVEN GERBER, EF-210
PC84854	A	1	A	FRGMOD	5P	OM	PRJA	EXTREMLAGEN F20	SVEN GERBER, EF-210
PC84854	A	1	A	SOLMOD	5P	OM	PRJA	EXTREMLAGEN F20	SVEN GERBER, EF-210

search results

6 search results found

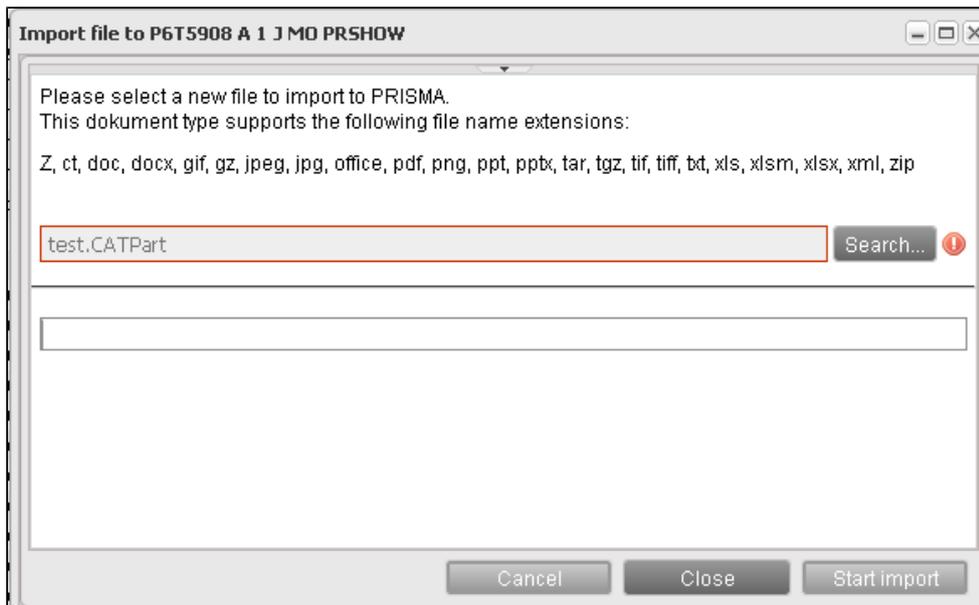
The search criteria can be defined in the upper dialog area using different input fields, selection lists and, if the **Others** option is selected for the owner, the icon "" for searching for owners.

After clicking the **Search** button, the hits are listed in the lower area of the dialog window. You copy the data record of a document selected from the hits to the calling dialog or instance function by clicking **OK**.

## Upload File to Document

The entry **Upload File** of the context menu **Document** opens a file selection dialog.

This function only is available via intranet. For importing a file to documents of the format "CA" and "5P" you will need the PRISMA role "SR2". For the document formats "AS", "ST", "SL" und "MA" the menu entry is inactive.

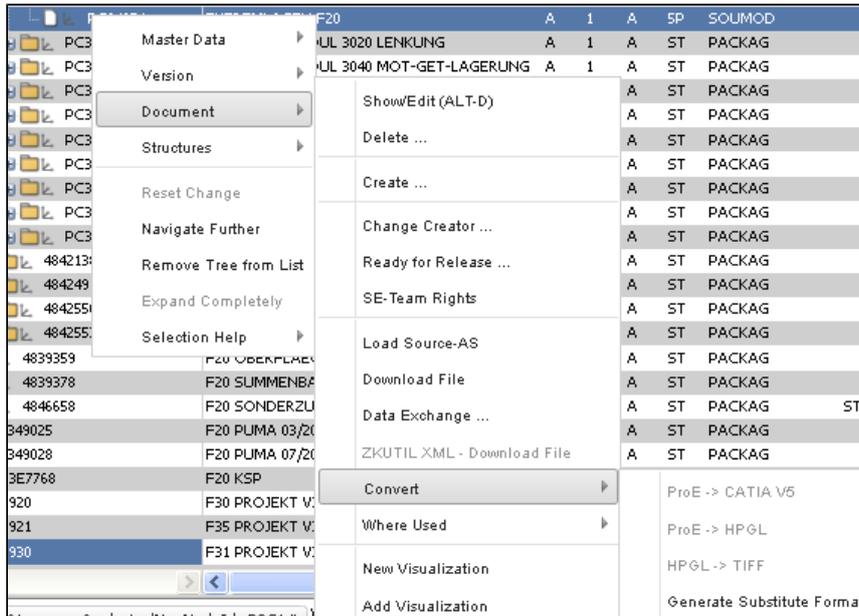


After clicking **Start Import** a progress information will be shown. You can now continue working.



## Converting documents

The submenu function **Convert** belonging to the context menu item **Document** opens a pop-up menu.



Comparison of document format and permitted conversion:

Doc. format	Permitted conversion
PA or PP	ProE -> CATIA V5
PD	ProE -> HPGL
HP	HPGL -> TIFF
5P, 5D, 5H, CA, 5Y	Generate substitute formats

In the case of multiple selection of documents, the permitted conversions for which at least one document in the selection has the corresponding document format are active. The selected conversion is only applied to documents in the selection for which the conversion is permitted. An initiated conversion is acknowledged in the message area of the results display with "Conversion started".

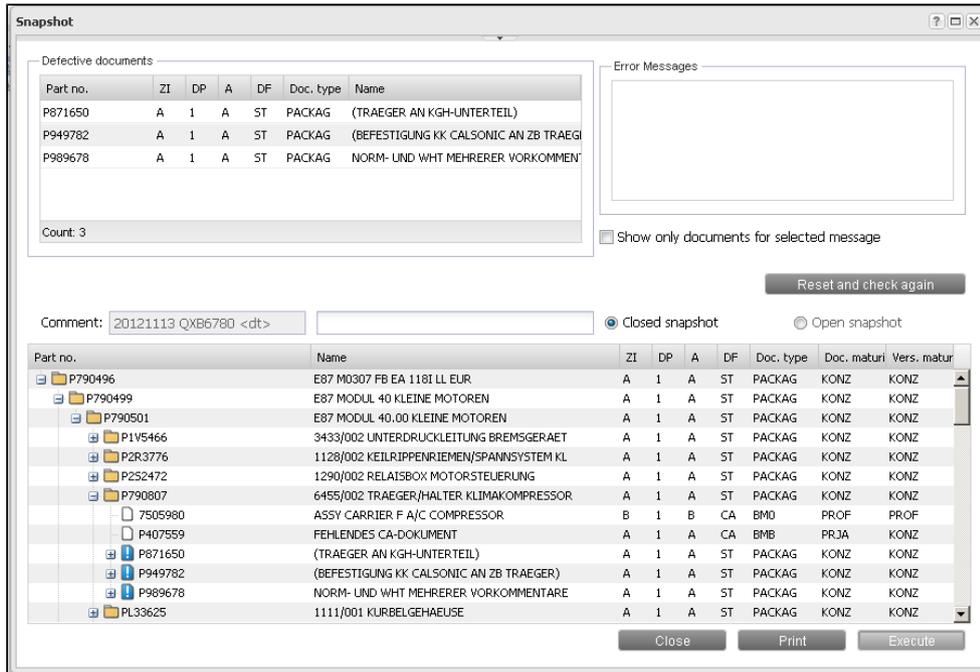
## Snapshots

At certain points in time (e.g. data provision for inspections of a virtual automobile) the progress of a structure document (e.g. a virtual automobile) needs to be documented. This is possible through the creation of a PSN snapshot. The PSN snapshot copies the virtual automobile's structure documents and creates a new automobile with an identical structure.

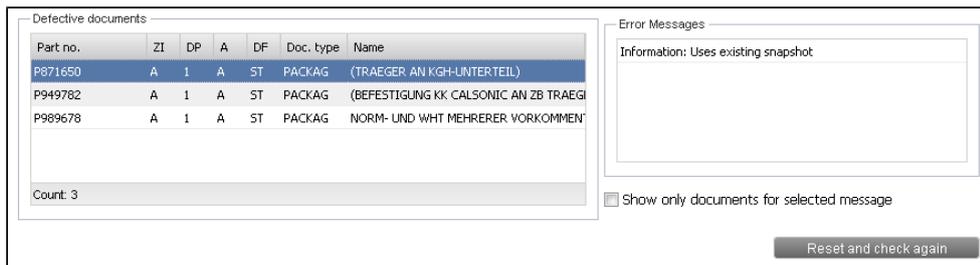
The sub-menu option 'document' under context menu option 'Structures' opens the pop up dialog 'document structure'. The selected structure will be tested for possible problems. Depending on the structure's complexity, this can take some time.

This context menu option is only available via the intranet to BMW employees with the SNP projekt role.

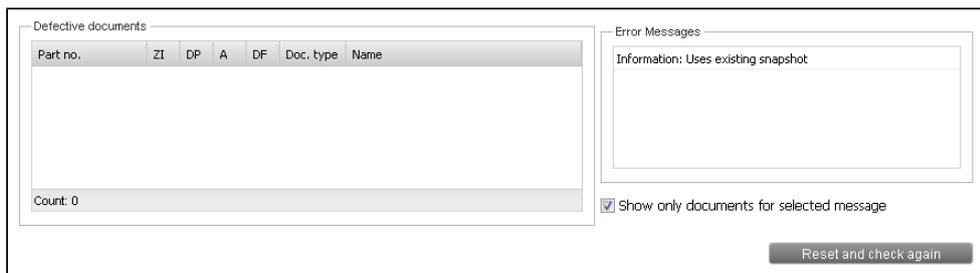
The 'documents with errors' list shows all problematic documents in the structure to be documented. In the structure tree below documents are identified with the symbols: information "i" and/or error "e" where applicable.



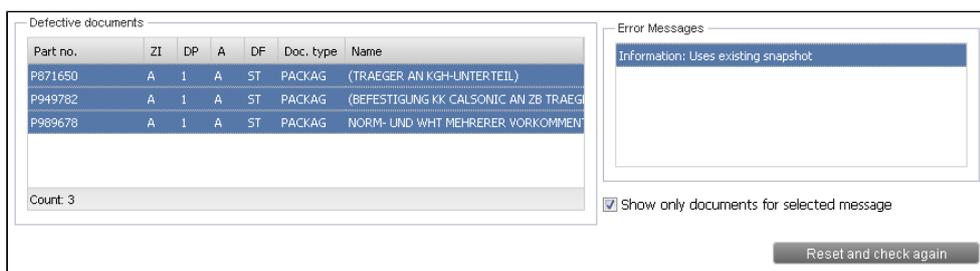
Should a list entry be selected, the message (Information/Error) for this document is displayed in the 'Error messages' list. Multiple entries can be selected.



If no document in the "Documents with errors" list is selected and the 'show messages for selected documents only' checkbox is checked, then every message for the structure to be documented will be displayed.



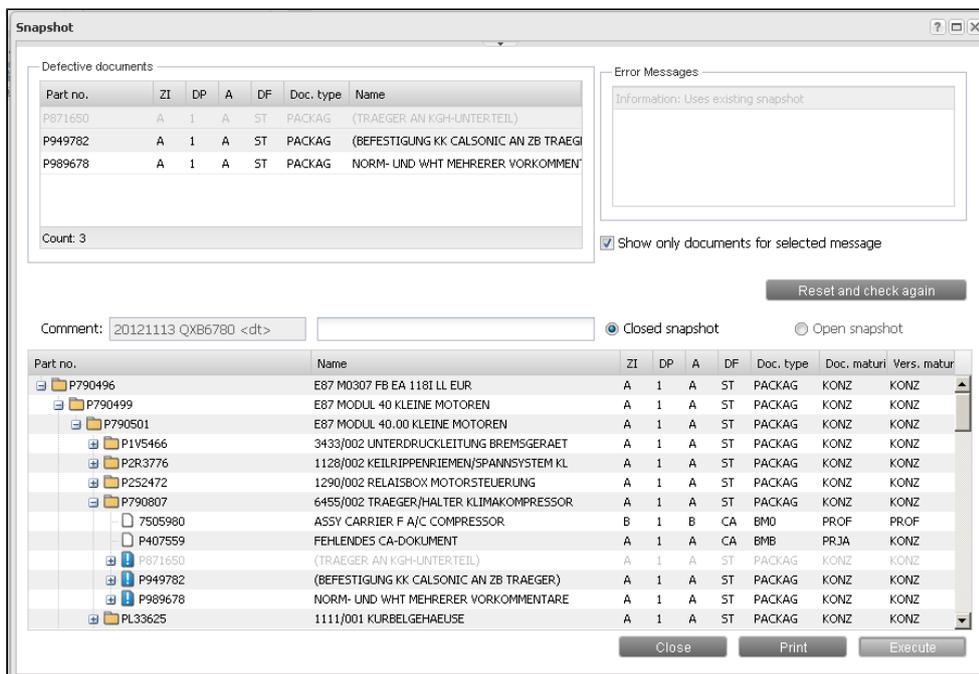
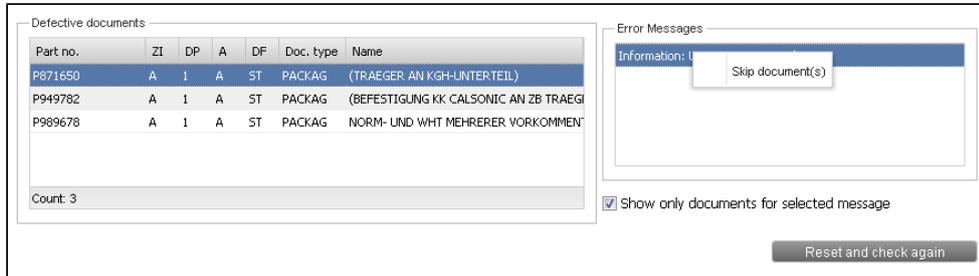
If an error in the 'Error messages' list is selected and the checkbox is checked, all related documents will be selected in the "Documents with errors" list. Before documenting, a tree must be error free. Where applicable through the skipping of documents with errors (see below). Once any errors have been dealt with, and the comment field has been filled in, the execute button is activated.



The snapshot can be executed as (select via radio button) :

- **Open snapshot** - documents have maturity "KONZ" and belong to the current user (i.e. subsequent manipulation is possible)
- **Closed snapshot** - documents have maturity "PRJA" and belong to the original document's owner (default)

The context menu option "skip document(s)" accessible through the "Error messages" causes documents in the structure tree with the selected error to be greyed-out and excluded from the snapshot.



The 'reset and test again' button resets selections, skipped documents and views.

The 'print' button creates an Excel file from the PSN-tree structure and the messages. Once created, the file may be downloaded or opened.

Part no.	Name (en)	Design index	Doc. part	Alternative	Doc. format	Doc. type	Doc. maturity	Version maturity
1	P790496	E87 M0307 FB EA 111A	1	A	ST	PACKAG	KONZ	KONZ
2	P790499	E87 MODUL 40 KLEIN A	1	A	ST	PACKAG	KONZ	KONZ
3	P790501	E87 MODUL 40.00 KL A	1	A	ST	PACKAG	KONZ	KONZ
4	P1V5466	3433/002 UNTERDRU/A	1	A	ST	PACKAG	KONZ	KONZ
5	7549697	ASSY BRAKE VACULF	1	A	CA	BMO	PROF	PROF
6	7633336	ASSY BRAKE VACULA	1	B	SP	FRGMOD	PROF	PROF
7	P2R3776	1128/002 KEILRIPPE/A	1	A	ST	PACKAG	KONZ	KONZ
8	P407559	FEHLENDES CA-DOKA	1	A	CA	BMB	PRJA	KONZ
9	P252472	1290/002 RELAISBOX A	1	A	ST	PACKAG	KONZ	KONZ
10	7520902	SLIDE-IN CARRIER PL G	1	A	SP	FRGMOD	PROF	PROF
11	P790807	6455/002 TRAEGER/H/A	1	A	ST	PACKAG	KONZ	KONZ
12	7505980	ASSY CARRIER F A/CB	1	B	CA	BMO	PROF	PROF
13	P407559	FEHLENDES CA-DOKA	1	A	CA	BMB	PRJA	KONZ
14	P871650	(TRAERER AN KGH-L/A	1	A	ST	PACKAG	KONZ	KONZ
15								

The snapshot created documents are given a uniform comment, made up of the date and free text. Every snapshot document belongs to the same part number and to the same ZI as the original document; Alternatives and document format stay the same. The document type is changed to SNAPPK or SNAPXY.

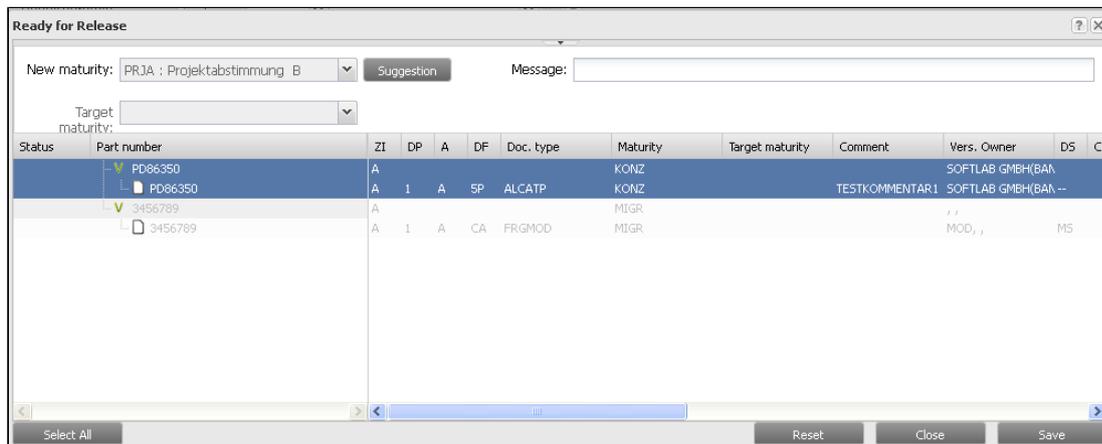
If more snapshots of a document can be created, then the part model number for the snapshots of the same document are incremented (from 1 to 99)

## Ready for Release, Release Announcement and Release Status

- Reporting versions and/or documents as ready for release
- Announcing release of part versions
- Release Status
- Restore Maturity

### Reporting versions and/or documents as ready for release

A binding design version is created by promoting a document or version to a higher maturity level. The submenu item **Ready for Release ...** belonging to the context menu function **Version** or **Document** shows a pop-up dialog.



Documents and/or versions selected from the results list are shown in the dialog. Trees are expanded. You can change the column width by dragging the column header boundaries and the column sorting with a click on a column header.

The decision as to whether versions are also to be reported as ready for release or not must already be taken in the context menu.

If the submenu function **Ready for Release ...** associated with the context menu item **Version** is applied to a **document**, the document and version are copied to the pop-up dialog.

In the case of **versions**, the submenu function **Ready for Release ...** belonging to the context menu item **Version** extends the selection to documents on lower levels.

If a 5Y document is to be reported to be ready for release, the documents directly referenced beneath the 5Y document are displayed in the "Ready for Release" dialog.

All list items that can be changed are initially selected. List items without write authorization are grayed out.

The selection list **New maturity** only contains values that can be achieved for the current selection. The next possible value is preset. Changing the value adjusts the selection.

The **Suggestion** button proposes the next possible **new maturity**.

The selection list Target maturity is only active for parts and at least one version must be selected.

The **Select All** button selects all list items to which the currently set maturity can be applied.

Errors are displayed in an area at the top of the dialog that expands, or by means of an icon in the status column.

You return to the initial selection and preset maturity with **Reset**.

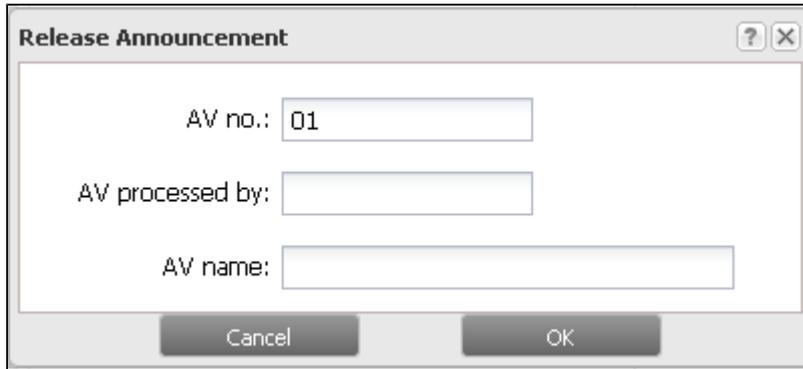
The **Save** button updates the results list. The dialog is closed with **Close**.

### Announcing release of part versions

The submenu function **Release Announcement** belonging to the context menu **Version** is available only for part versions with a numerical part number (TAIS part number).

The release announcement is cancelled if a number of versions with different NAEL numbers (identifiers of a specific design scope) or a number of versions with the same NAEL and the same part number have been selected.

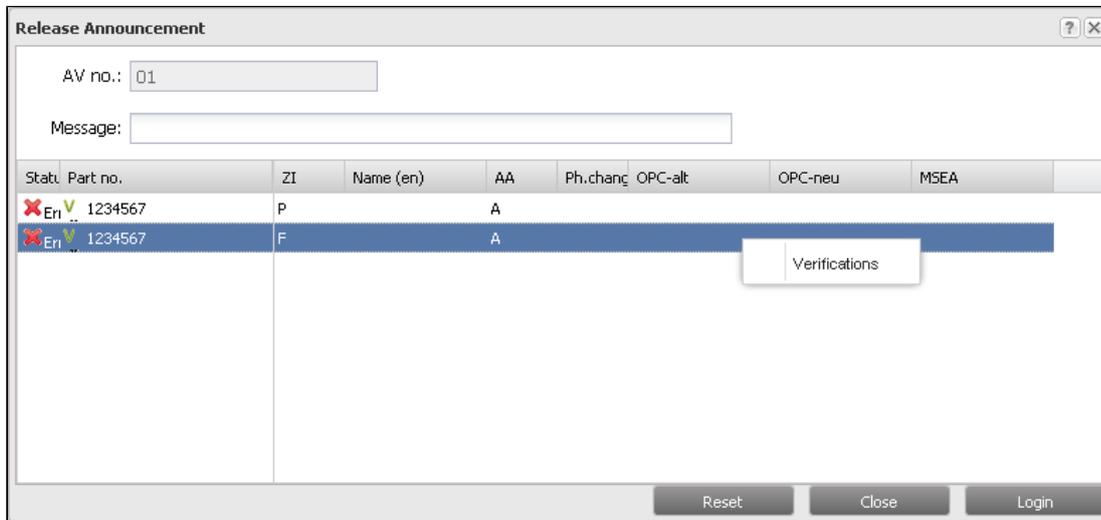
In the first dialog, enter the working version data for the part versions to be released.



A dialog box titled "Release Announcement" with a question mark and close button in the top right corner. It contains three input fields: "AV no.:" with the value "01", "AV processed by:", and "AV name:". At the bottom, there are "Cancel" and "OK" buttons.

A check is then carried out on the versions to determine whether the releases already exist in TAIS. If

- there is a release, a message can be entered in the second dialog.
- no release has yet taken place, additional directives (old OPC, new OPC, MSEA) can be entered in the second dialog.



A dialog box titled "Release Announcement" with a question mark and close button in the top right corner. It contains an input field for "AV no.:" with the value "01" and a "Message:" input field. Below these is a table with columns: "Statu", "Part no.", "ZI", "Name (en)", "AA", "Ph.chang", "OPC-alt", "OPC-neu", and "MSEA". The table has two rows, both with "1234567" in the "Part no." column. The first row has "P" in "ZI" and "A" in "AA". The second row has "F" in "ZI" and "A" in "AA". A context menu with the item "Verifications" is open over the second row. At the bottom, there are "Reset", "Close", and "Login" buttons.

Statu	Part no.	ZI	Name (en)	AA	Ph.chang	OPC-alt	OPC-neu	MSEA
Err V	1234567	P		A				
Err V	1234567	F		A				

The context menu item **Verification** for a selected version opens the pop-up dialog [Version verification](#). The **Announce** button registers part versions selected in the dialog for release. The dialog is closed with **Close**.

## Release Status

## Restore Maturity

## Data exchange

The object of data exchange is to provide (by means of export) CAD data and associated administrative data to all users at external companies involved in the design process and also to receive data processed by those users and integrate the data into PRISMA (import).

- [Export](#)
- [Import](#)

## Export

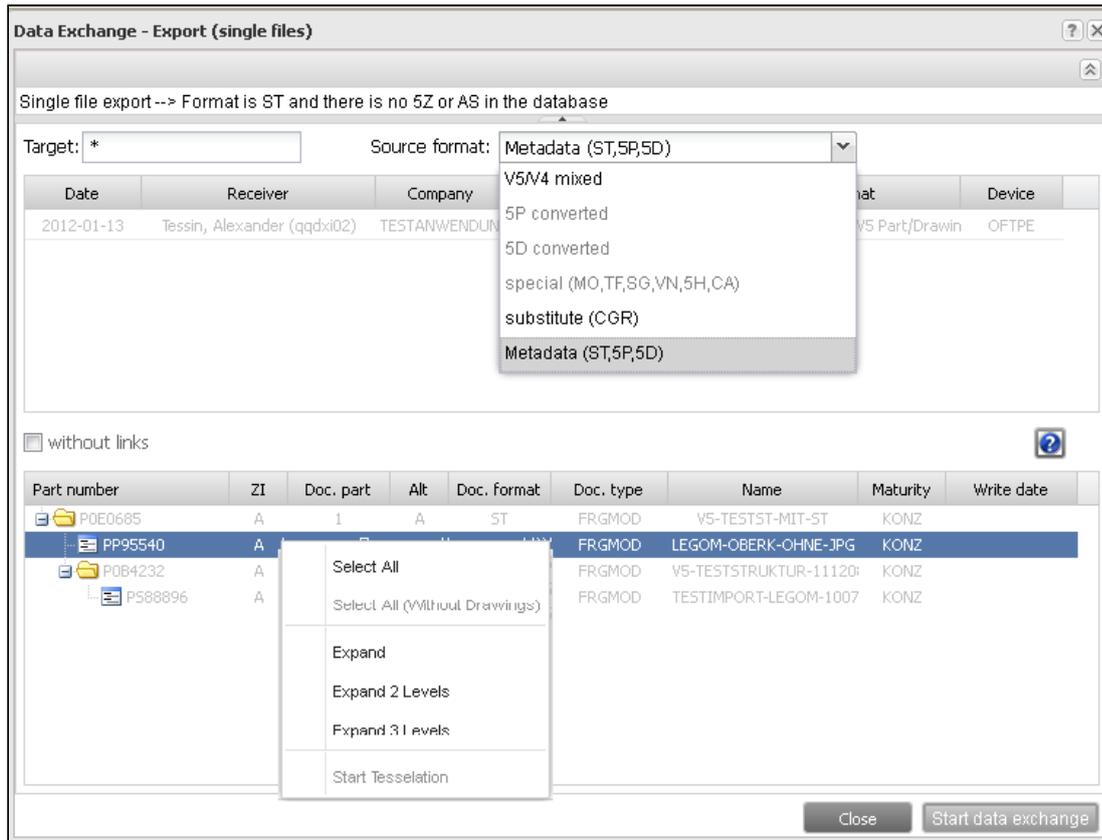
The submenu function **Data Exchange** for the context menu item **Document** starts the export of one or more documents selected from the results list. The document format determines the export path.

**CARISMA CAD PDM package:** (i.e., ST with 5Z + work structure document, identical part number, ZI, DT, A): Forwarding for display of the work structure of a CARISMA CAD PDM package selected in the results list, from where the export can be initiated.

**CARISMA SHS package:** (i.e., ST with 5Z document, identical part number, ZI, DT, A): Opens a pop-up dialog for exporting one or more CARISMA SHS packages.

**Single file:** Opens a pop-up dialog for exporting one or more single files (ST (without 5Z), 5Y, 5B, 5P, 5D, 5H, CA, MO, VN, SG, SL, TF documents).

The same pop-up dialog is used to export **CARISMA SHS packages** and **single files**.



When exporting **single files** first select a suitable entry from the list of source formats.

Data exchange targets created in PRISMA for the current user are listed at the top. Only data exchange targets that can receive the document format to be sent can be selected.

The list of data exchange targets can be limited using the search field **Target**. Select a data exchange target.

The documents copied from the results list are displayed at the bottom. Initially all documents for which export is permitted are selected. You can change your selection.

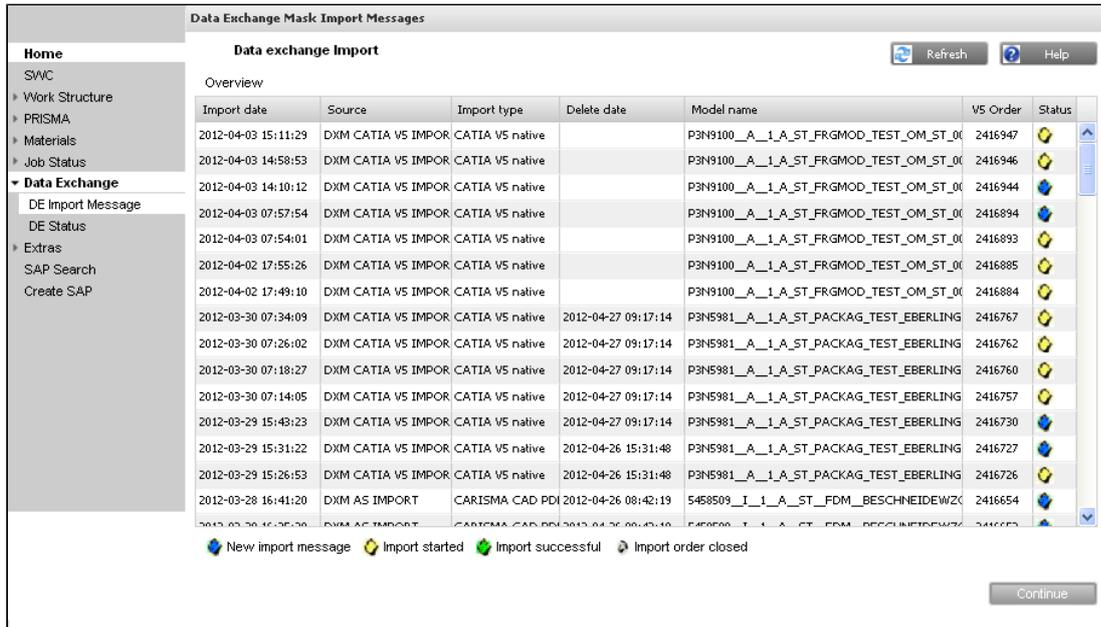
If the source format "Replacement format (CGR)" is selected, CATIA V5 documents (ST, 5P) are exchanged with CGR documents (CG). A 5P document displayed in blue means there is no CGR document. The context menu item "Start tessellation" generates the document in the background.

The option **without links** removes documents associated by a link and displayed in green at the moment of the list.

After starting export successfully, the V5 job number (order ID) is shown in the message area of the dialog. The current status of the started exports is shown in a table by means of the PRISMA WebClient menu item [Data Exchange Status](#).

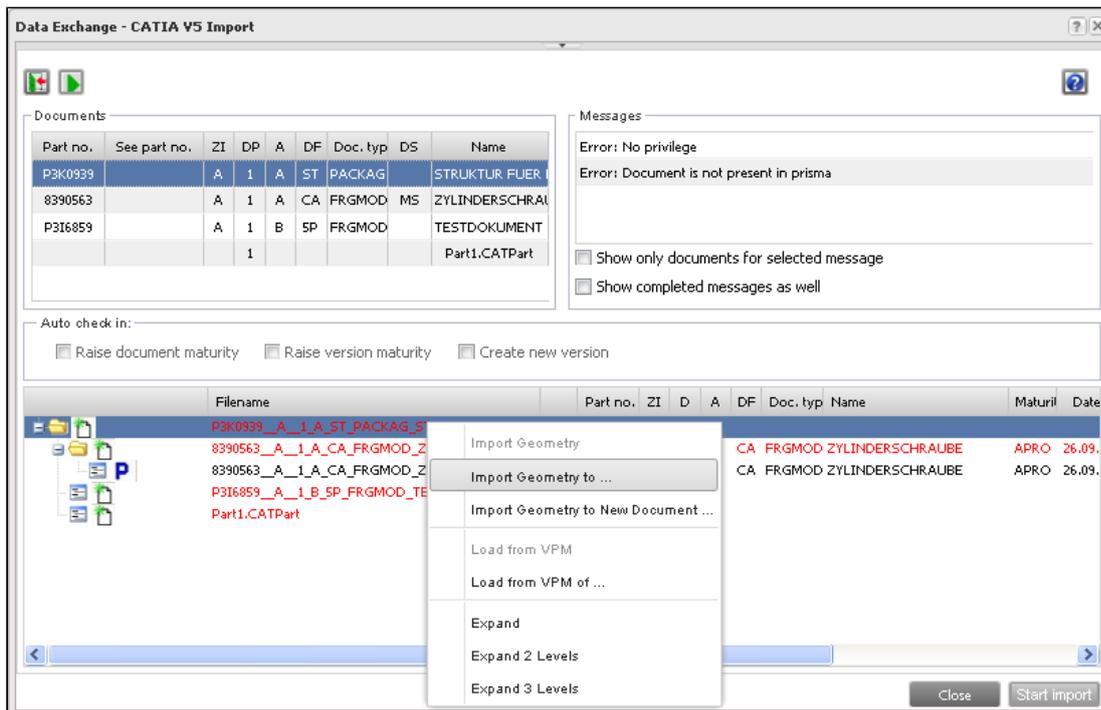
## Import

The side menu function **Data Exchange Import Message** lists the available import messages for the current user.



The data record of a new import message  can be selected and the data import can be initiated with the "Continue" button.

If the import message of a CATIA V5 native data package is selected, the following dialog is shown.



The upper dialog area contains documents for which there are separate messages (warnings or errors). The selection of displayed documents and messages can be adjusted using option boxes underneath the messages.

The files to be imported are assigned to the documents in PRISMA in the list in the lower dialog area. Documents whose file names cannot be interpreted in accordance with the OEDE convention and for which no import assignment is possible are shown in red.

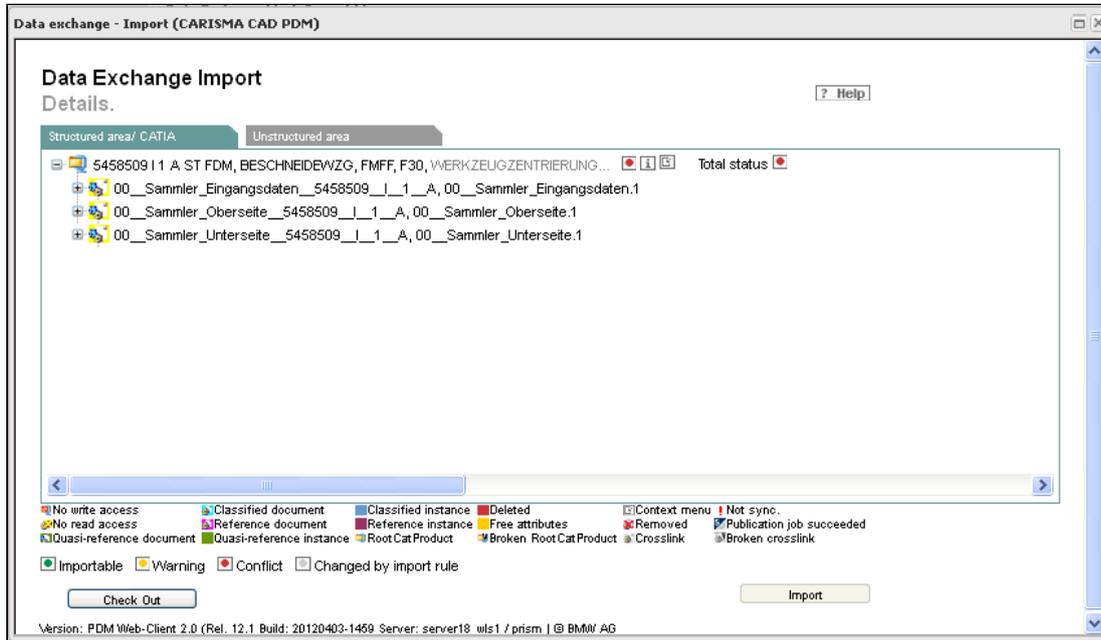
The context menu function **Import Geometry to ...** opens the search dialog **Select Document** in order to specify the target document in PRISMA using search criteria (e.g., other alternatives).

The context menu function **Geometry in New Document** opens the dialog for creation of a document in order to assign the data to be imported to it.

With **Load from VPM** you can load a linked part from VPM, or with **Load from VPM of ...** you can load a document found in the search dialog from VPM.

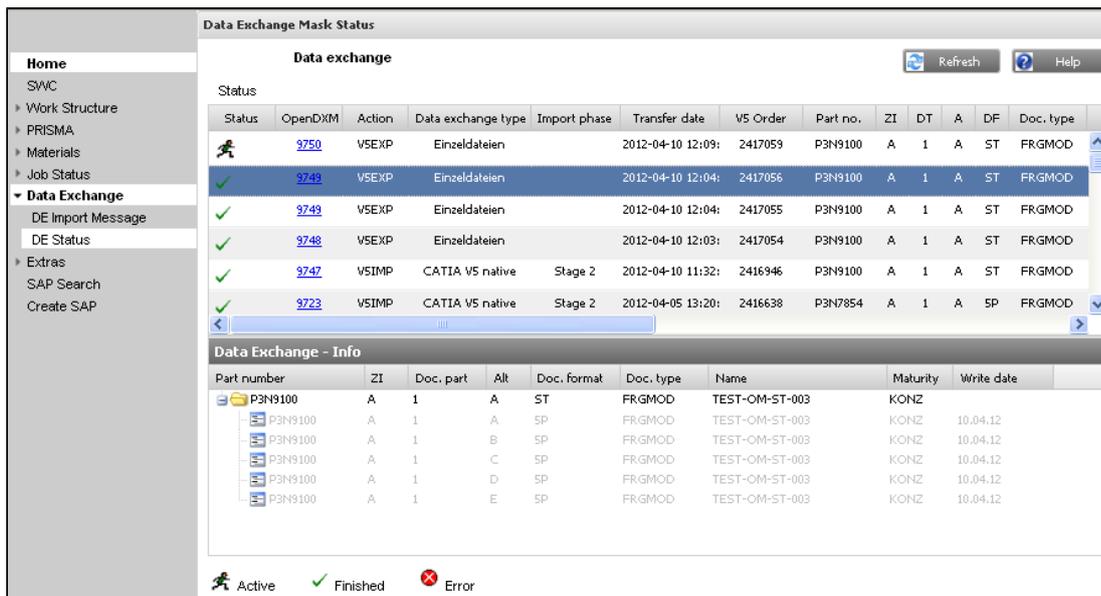
Once all data has been assigned to target documents, you can start the import.

If an import message is marked in the "Source" column with the option **DXM AS Import**, clicking Continue causes it to be forwarded to the CAD PDM import function.



## Data exchange status

The side menu item **Data Exchange** opens a list of all data exchange actions of the current user.



If a data package (CARISMA SHS or CATIA V5 native) is selected from the upper list, the documents contained in the package are displayed as data exchange information further down.

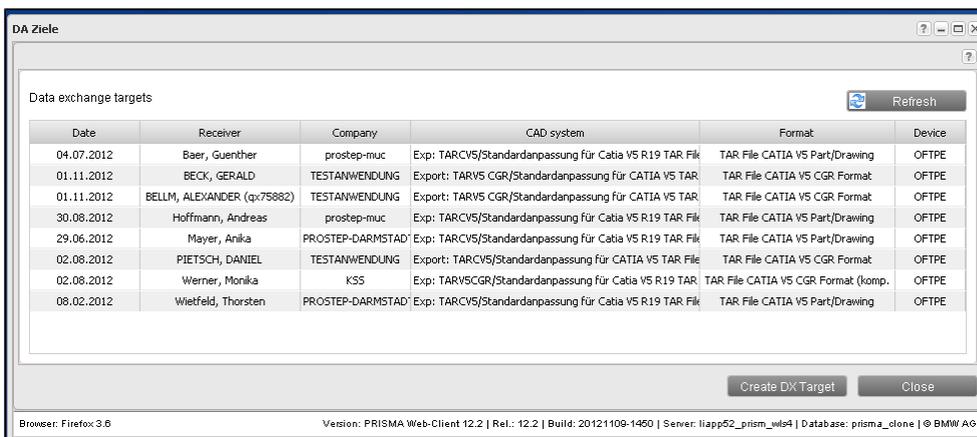
The link in the "OpenDXM" column is used to open an OpenDXM job in OpenDXM in the B2B portal.

## Data Exchange Targets

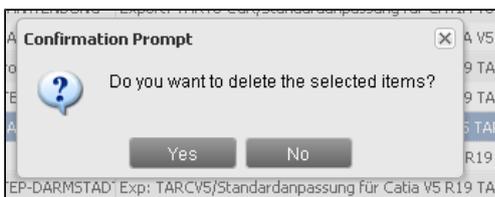
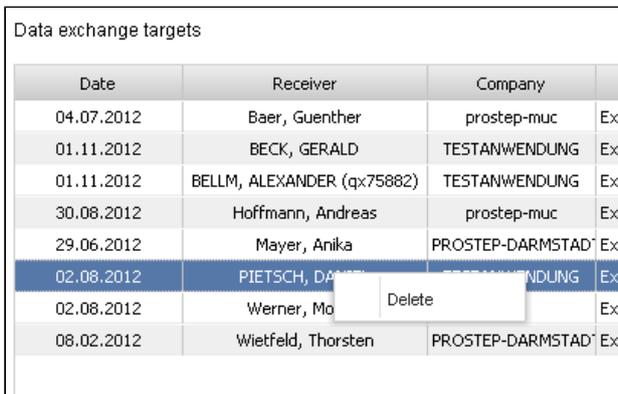
- [Create DX Target](#)

The function **Dataexchange - DX Targets** offers you the possibility to specify external receivers for data exchange. These receivers will be available as data exchange target for the export.

The function opens the following dialog, listing the available data exchange targets for the user.



The list entries are offering a context menu with the entry **Delete** to delete the selected target. Before the entry will be permanently deleted this operation has to be confirmed.



## Create DX Target

DX targets are created with the following procedure. Start searching the supplier, using the company name ore the supplier number.

Matching suppliers are listed in the table as a tree. Expanding the tree will show the persons associated to the company.

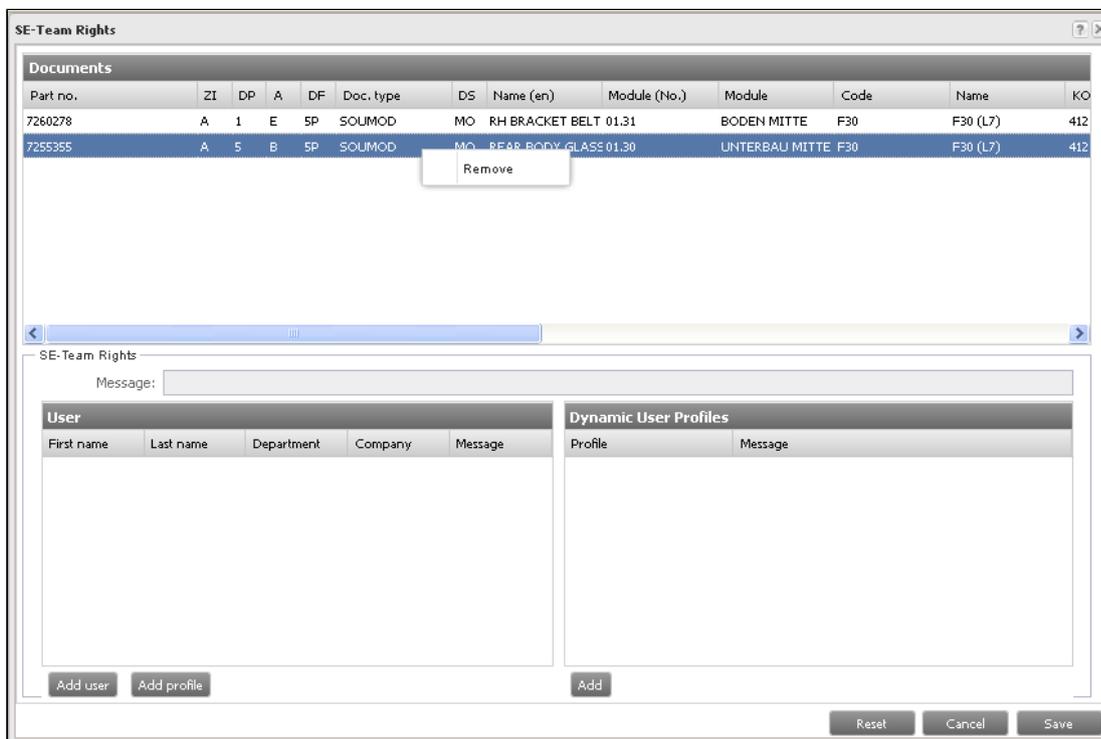
Please select the receiver. Now step through the menus in the area **Media-Format-Selection** to define source format, device, target format and target CAD system.

Is it an unique selection, the selection boxes are filled automatically.

Clicking the button **Create DX Target** will create the target and add it to the target list.

## Assigning SE team rights for documents

By assigning SE (simultaneous engineering) team rights, project members or users outside the project are granted read access rights to models that are still at the concept level (KONZ) for quicker communication. The context menu item **SE-Team Rights** opens the dialog for assigning SE team rights.



The documents selected from the results list are shown at the top of the dialog. You can remove a selected document from the list using the context menu item **Delete**.

The lists can be sorted differently in the dialog with a mouse click on a column header. Dragging the column boundary changes its width.

Read access rights can be assigned to individual users or preset user groups (user profile/dynamic user profile).

- [Selecting users](#)
- [Selecting user profiles](#)
- [Selecting dynamic user profiles](#)

The field "Message" is only active provided an item is selected from the "Users" or "Dynamic User Profiles" list. The entered message text is displayed for the selected list items in the column "Messages".

The **Save** button saves the SE team rights for the selected users and user groups.

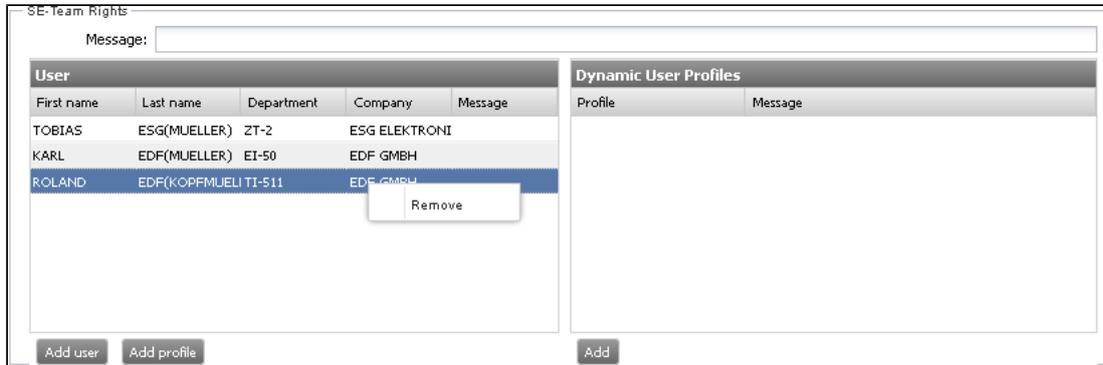
### Selecting users

The button **Add User** at the bottom left of the "SE Team Rights" dialog area opens the pop-up dialog "[Select Owner](#)" for

searching for users.

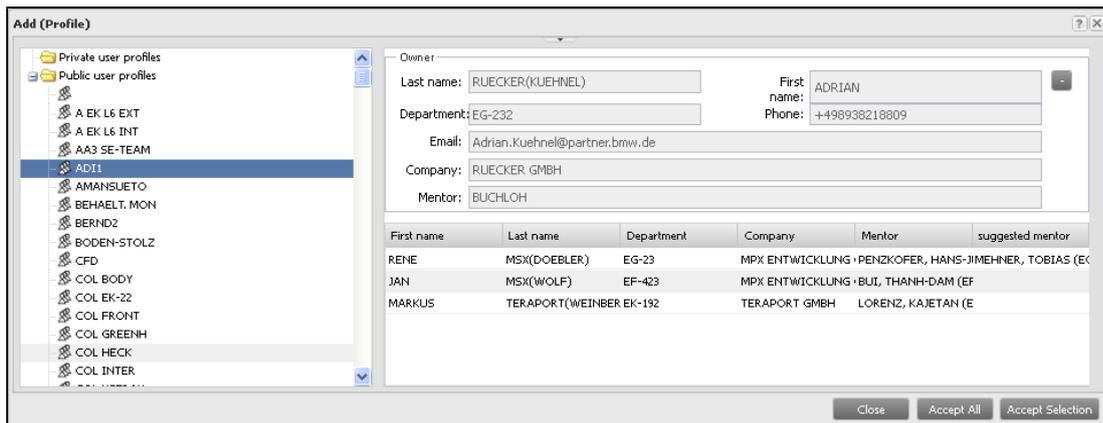
The user found by the search in accordance with search criteria is transferred to the "SE Team Rights" dialog and displayed in the "Users" list.

You can remove a selected user from the list using the context menu item **Delete**.



### Selecting user profiles

The button **Add Profile** at the bottom left of the "SE Team Rights" dialog area opens the pop-up dialog "Add (Profile)" for selection of a user profile or individual users from it.



The table on the left of the dialog shows private and public user profiles. You can only select one profile.

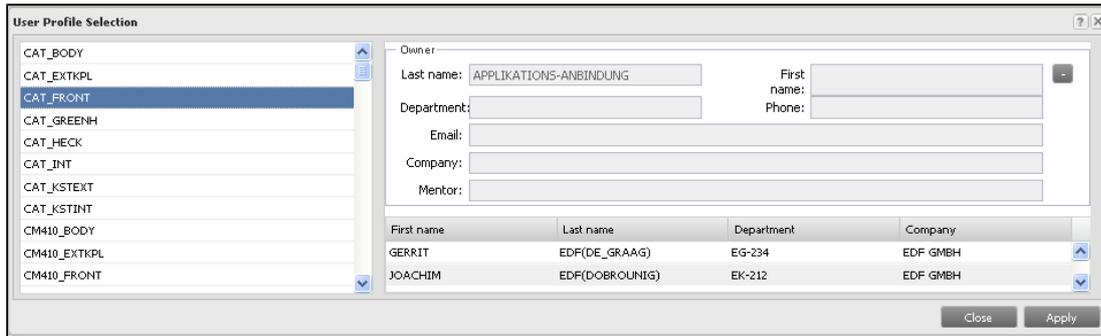
The owner of the selected user profile is displayed on the right in the "Owner" panel. The plus symbol (+) in the "Owner" panel displays further information on the owner.

The users assigned to the selected user profile are listed below the "Owner" panel. The owner is not included in the list.

Selected users from the list or all users in the profile can be accepted. Accepted users are added to the list of users in the "SE Team Rights" dialog. The owner is not added.

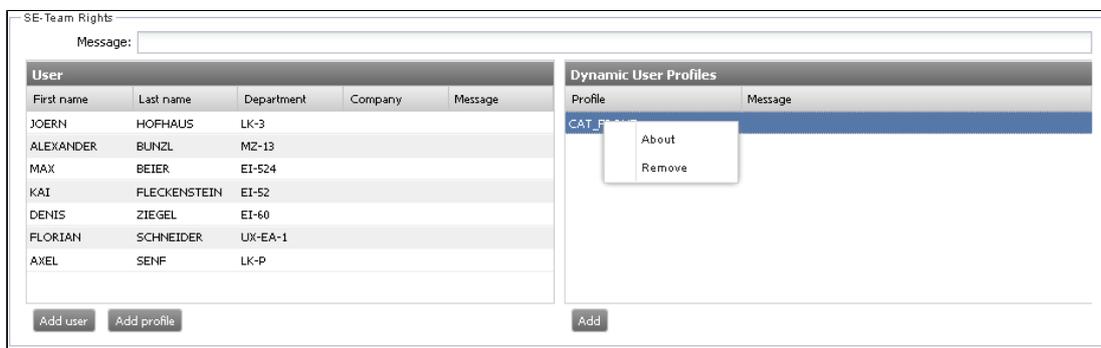
### Selecting dynamic user profiles

The **Add** button below the "Dynamic User Profiles" list in the "SE Team Rights" dialog opens the pop-up dialog "Select User Profile".



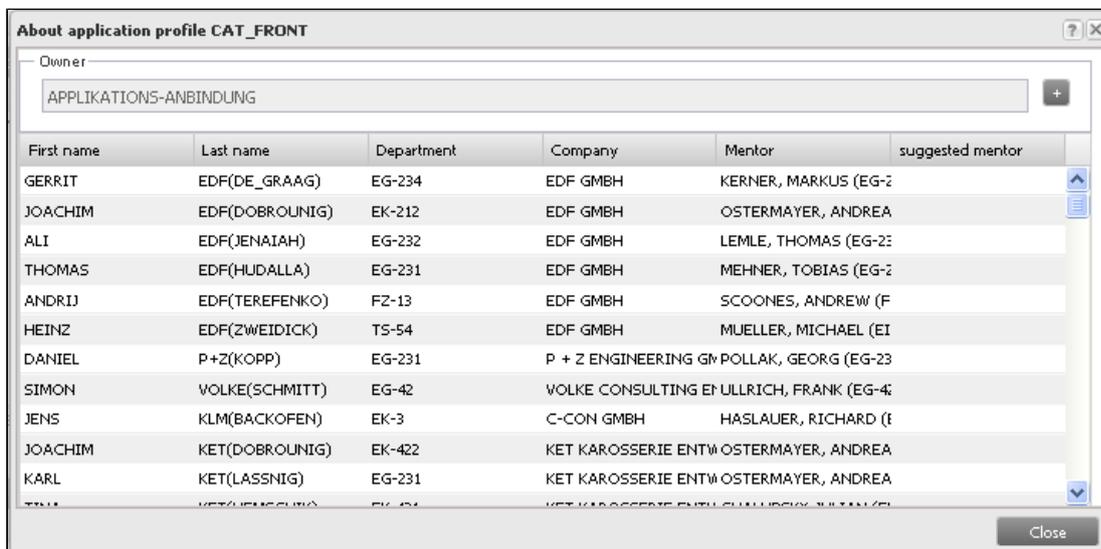
A list of dynamic user profiles is displayed in the left of the dialog. You can only select one profile. The profile owner and profile members are displayed analogously to the selection made in a user dialog above.

Clicking the **Apply** button displays the selected user profile in the "Dynamic User Profiles" list in the "SE Team Rights" dialog. Individual users cannot be accepted. Other individual profiles can be accepted. The "Cancel" button closes the dialog without accepting data.



Profile users receive an e-mail with a list of documents for which SE team rights have been assigned.

The context menu item **About** for a user profile selected from the "Dynamic User Profiles" list opens a dialog with information on the owner and the users assigned to the profile.



You can remove a profile selected from the "Dynamic User Profiles" list with the context menu function **Delete**.

## T-Gate Write Access

The submenu entry **T-Gate write access** of the context menu **Document** which belongs to a selected T-Gate structure node opens the dialog **T-Gate Write Access**.

Unable to render embedded object: File (IAP-T-Gate.PNG) not found.

In the lower half of the dialog, users are listed who have write access to this or higher nodes. Users with read access to the project are listed in a second list. A User may only be in one of those lists.

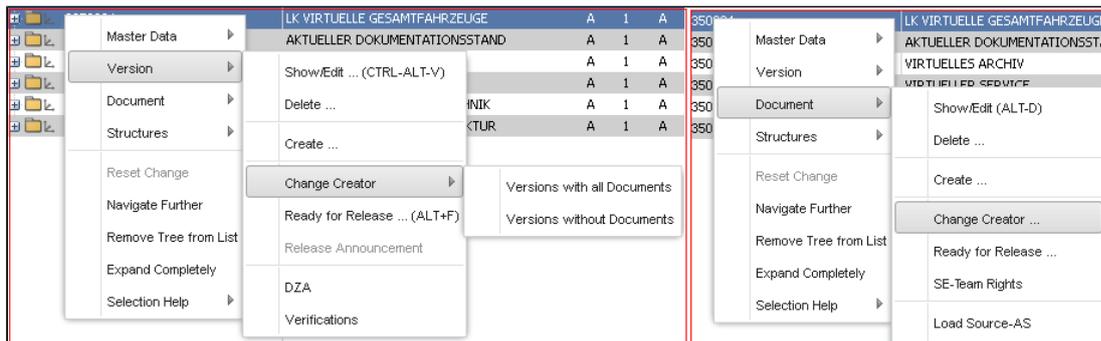
The button **Distribute T-Gate rights** will distribute the given access rights of this structure node to the related ones.

One or more Users selected in the list "Project read access" oder the list "T-Gate access on structure node" could be moved to the other list, using the arrow buttons..

Changes will be saved permanently, using the button **Save**.

## Changing creator

The displayed context menu items for changing creator open the dialog User Search.



The user selected using search criteria in the User Search dialog becomes the new owner of the selected versions with all documents, versions without documents or with just documents.

If a change of creator for one or more versions/documents is not possible, a message will appear containing a list of affected versions/documents.

All versions and documents (if applicable) may be assigned to the new owner upon confirmation of the message, assuming the new owner has write permission on the version/document.

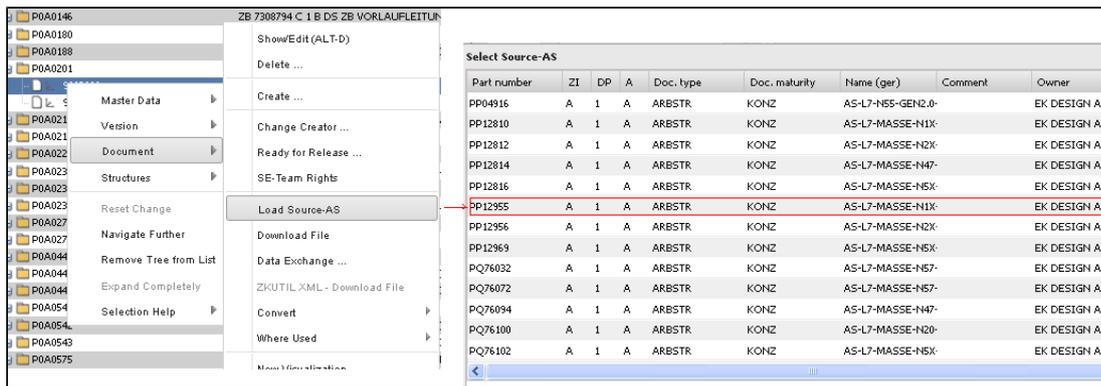
The change of creator is effective upon confirmation of the security prompt.

Errors are shown in the status column.

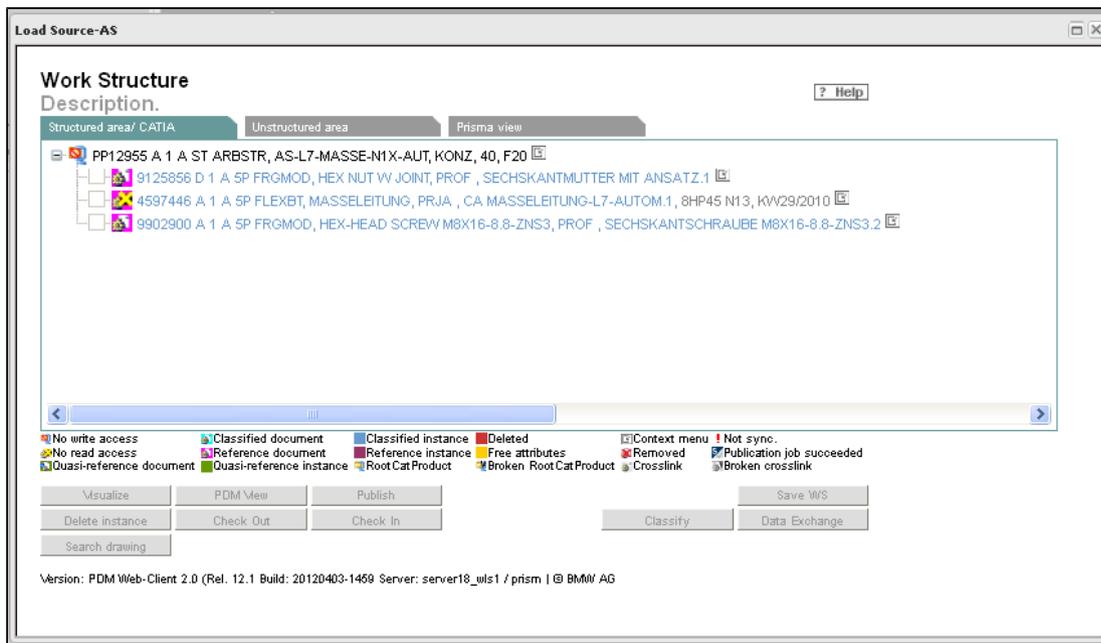
## Loading Source AS for Document

Parts that have been published in SAP using the CAD PDM process are still in a work structure. Whether the part was exported from SAP to PSN can be seen from the comments (FROM SAP ...) in the ST document.

The source work structure of a document selected from the results list can be localized with the menu item Load Source-AS and loaded into a separate window.

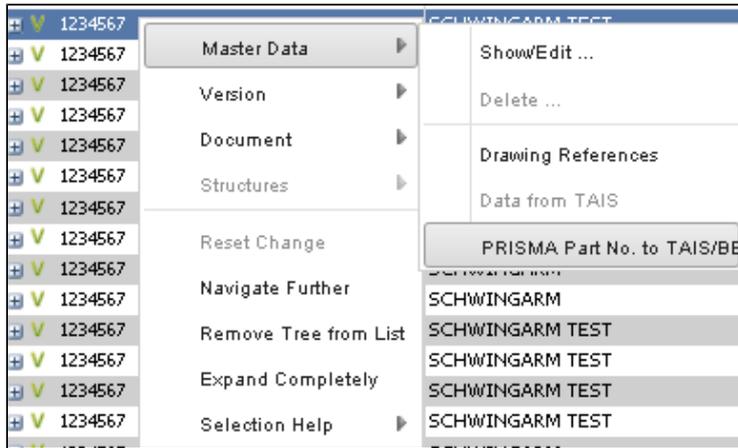


If there is more than source work structure (AS) for the selected document, a selection window **Select Source-AS** showing all work structures containing the part opens. Select a work structure. The **Apply** button shows the selected work structure in a separate window.

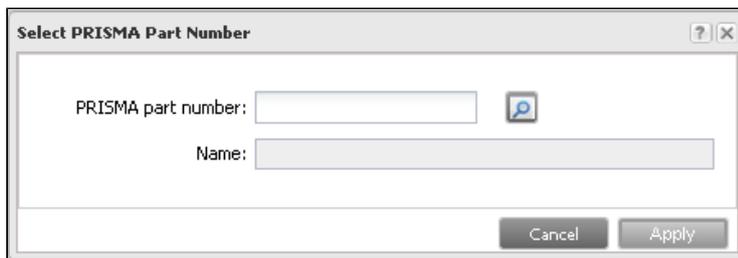


## PRISMA part number to TAIS or BEMI

The context menu item **PRISMA Part No. to TAIS/BEMI** is only available if a TAIS or BEMI part number is selected in the results list.



If the selected TAIS/BEMI master data already has a version, an error message is displayed. Otherwise, the context menu item opens a pop-up dialog.



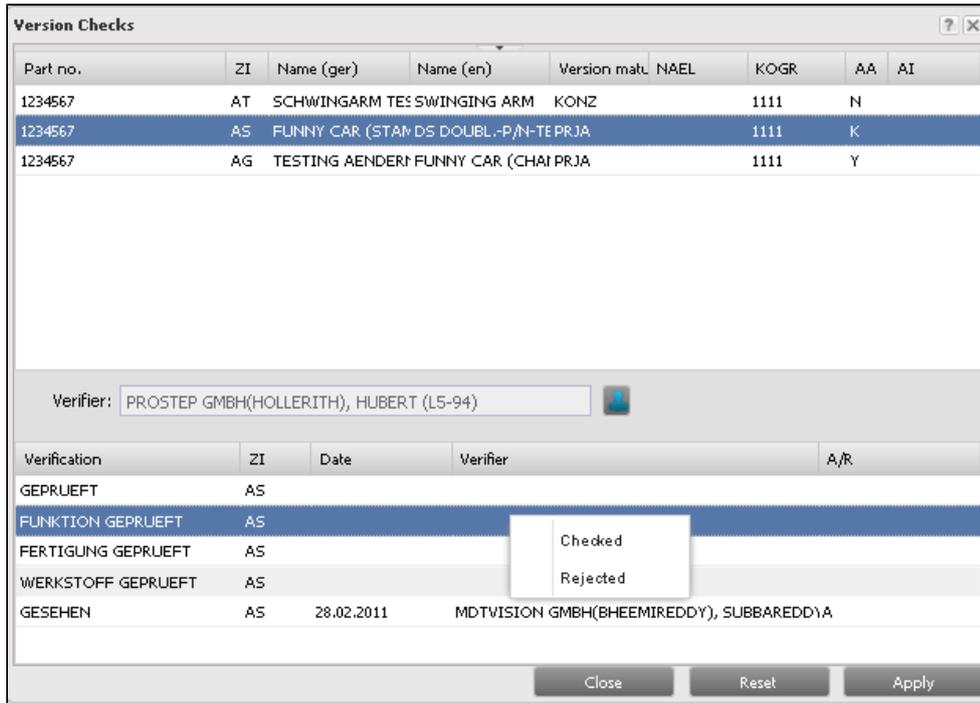
Use the search field to find the PRISMA master data whose versions and documents are to be copied to the TAIS/BEMI master data.

If the PRISMA master data has an SHS container, an error message is displayed in the message area and the process is cancelled.

The PRISMA master data is deleted after the versions and documents have been reattached, and the results list is then refreshed.

## Verifying versions

The submenu item **Verifications** for the context menu function **Versions** opens a pop-up dialog in which the result of the check of the administrative and geometrical data in PRISMA can be entered.



The dialog shown above lists the **Selected Versions** from the results list. You can select one or more versions from the list for which check results can be entered.

The registered user is displayed in the field "Checker". Clicking the icon  opens a dialog for **Searching for Users** in order to specify another user as checker.

Except for the "Material checked" check, the context menu items **Checked** or **Rejected** can be used to specify the result of the check, then indicated with "V" (for verified) or "R" (for rejected) in the "V/R" column for the list of verification checks.

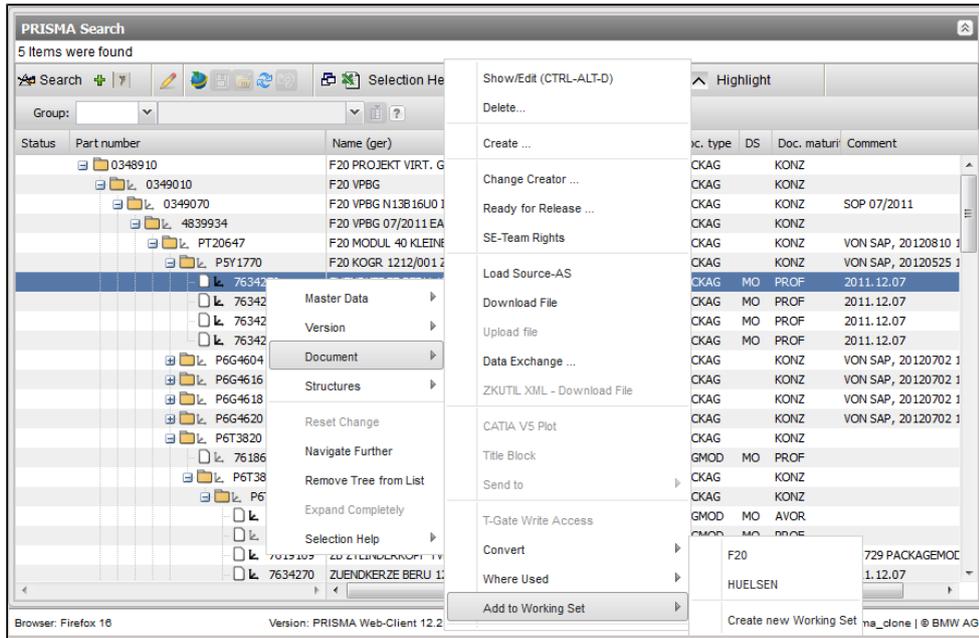
The **Apply** button saves the results of the verification in the database.

The success or failure of the verification is shown in the expandable message section at the top of the dialog.

## Working Sets

A document working set is a collection of frequently used documents. Once saved, the user may access a working set as often as required.

The context menu item 'working sets' displays all previously saved sets and the 'create new' set option. The 'create new' menu option allows selected documents to be added to a new working set.

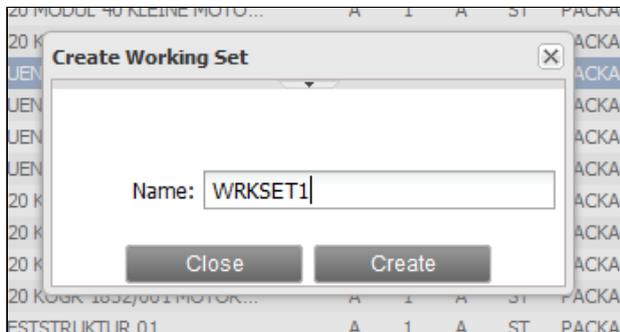


Only working sets belonging to the current user will appear in the list.

- Create working set
- Add documents to a working set
- Show, edit and select a working set
- Update working set

### Create working set

Clicking **Create new Working Set** in the context menu triggers a pop up box which in turn asks the user to name the new working set.



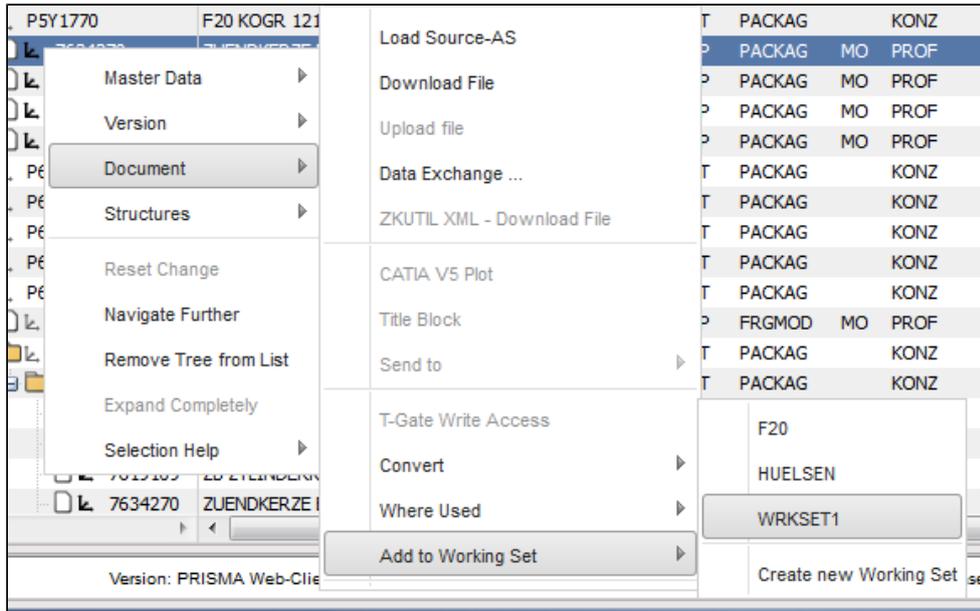
The name should be unique and between 1 and 12 characters long.

Documents currently selected in the search results list will be added to the new working set.

If the new working set was successfully created, it will appear in the list of available working sets under context menu option 'working sets'.

If an error occurs, a message is displayed on the info panel and the pop up dialog remains open.

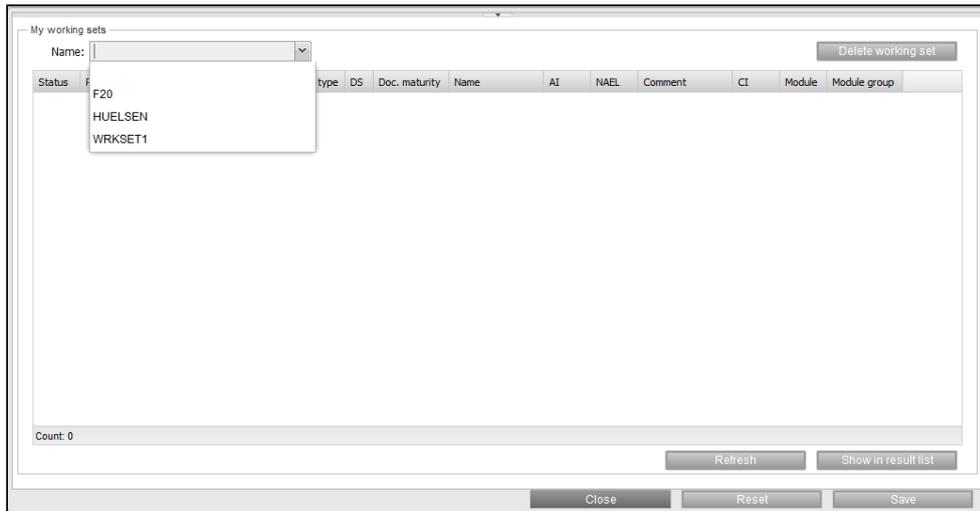
### Add documents to a working set



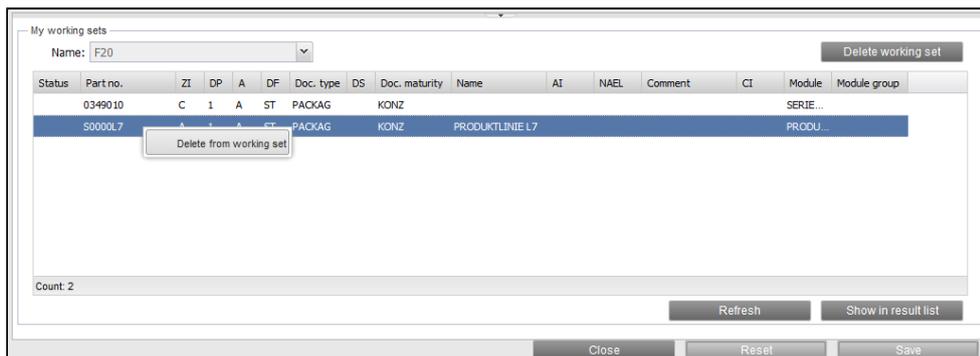
A user can add documents to an existing working set by selecting it in the context menu. Documents currently selected in the search results list, that are not already included, will be added to the working set.

### Show, edit and select a working set

The start menu option 'Working Sets' opens the working set dialog.



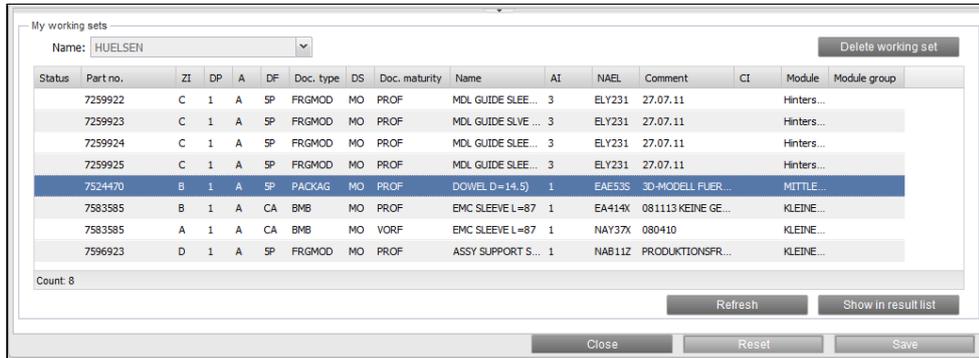
Clicking the empty field marked 'Name' displays a list of the user's working sets. Selecting a working set from the list displays the included documents in the "My Working Sets" results table. The table columns are predefined. Sort order and column width can be altered.



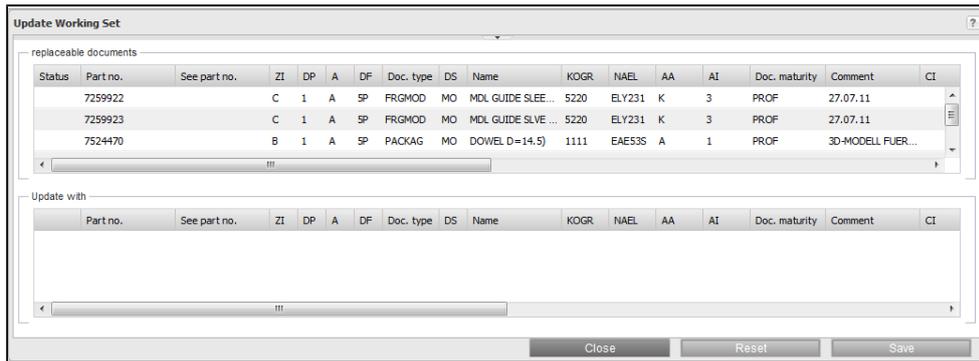
The button 'Load To Grid' adds the selected working set's documents to the result list. A working set can be removed by clicking the 'Delete Working Set' button and confirming the subsequent dialog. The working set will no longer appear in either the 'Name' list or via the context menu. The context menu option 'Remove from working set' causes the selected documents marked with a 'to be deleted' symbol in the status column. The changes take effect when the "Save" button is clicked.

### Update working set

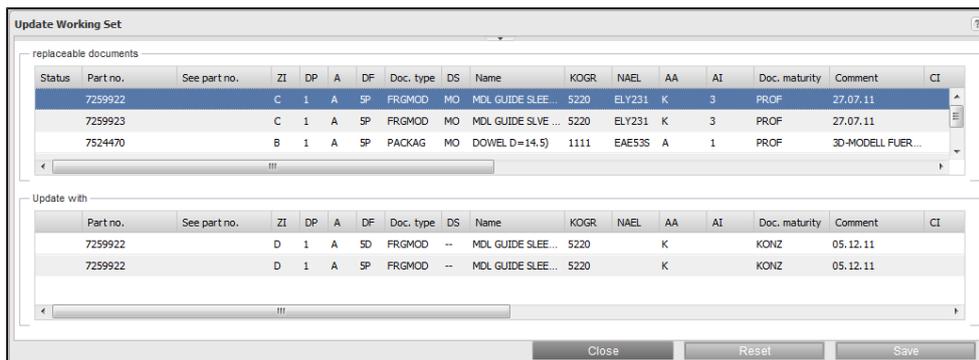
In the working set dialog, documents included in the currently selected working set appear in the 'My Working Sets' results table.



The **Refresh** button, when clicked, searches the system for newer or alternative versions of the selected documents. If a newer or alternative version is available it will be listed in the 'Replaceable documents' table.



When a replaceable document is selected, its potential replacements are displayed in the 'Update with' table.



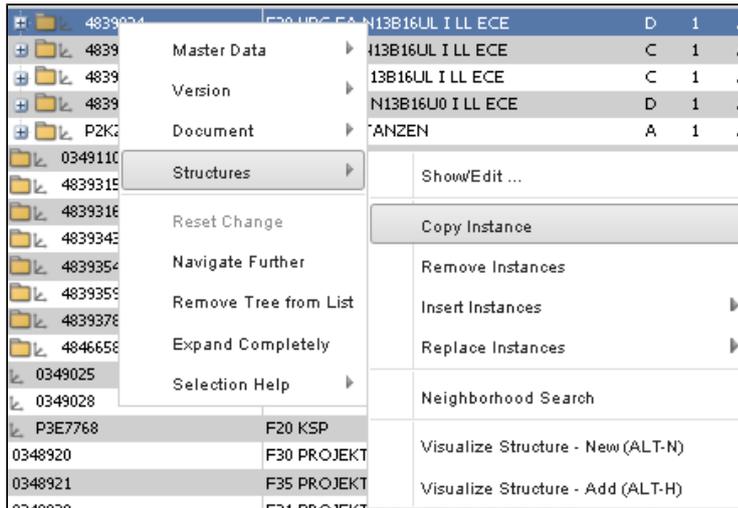
Replace documents with the context menu option 'replace'. The replace document symbol appears in the status column and changes take effect when the 'save' button is clicked.

## Copying, Inserting and Replacing Instances

- Copy Instance
- Insert Instances
- Replace Instances
- Remove Instances

Instances also may be copied and inserted by [Drag & Drop](#).

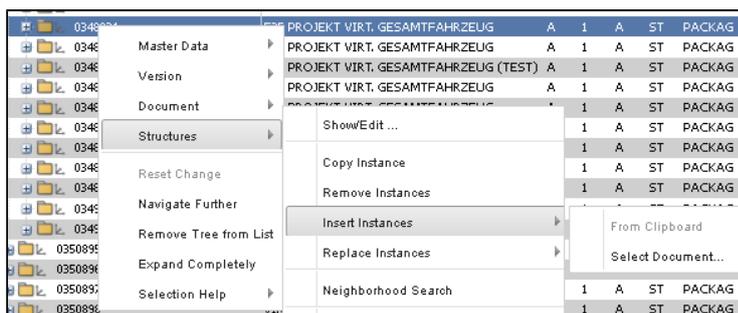
### Copy Instance



The menu item **Copy Instance** copies documents and instances selected from the results list to the clipboard.

**Note:** If a child of a 5Y document is to be copied, it will be copied with its position in relation to the topmost displayed node in the hierarchy. The transformation matrices of the individual levels will be multiplied.

### Insert Instances



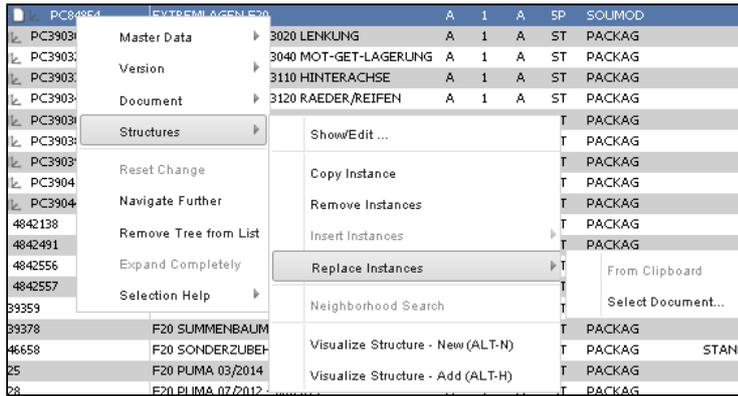
The menu item **Insert Instances** is only available for documents and instances with the format ST.

The pop-up menu function **From Clipboard** adds documents as instances with zero position and instances with the copied position to the structure document selected from the results list. The pop-up menu item is only active if there are documents and instances on the clipboard.

The pop-up menu function **Select Document ...** opens the pop-up dialog [Select Document](#).

The document selected from the list of hits in the [Select Document](#) dialog is added in the zero position to the structure document selected from the results list.

### Replace Instances



The menu item **Replace Instances** is only available for instances.

The pop-up menu function **From Clipboard** is only available if there is exactly one document on the clipboard. This document replaces the instance selected from the results list.

The pop-up menu function **Select Document ...** opens the pop-up dialog [Select Document](#). The part number in the dialog is already set with the part number of the instance to be replaced, but you may change the number. Replacing the instance only causes the referenced document to be replaced. The instance ID with positioning and the name of the instance remain unchanged.

## Remove Instances

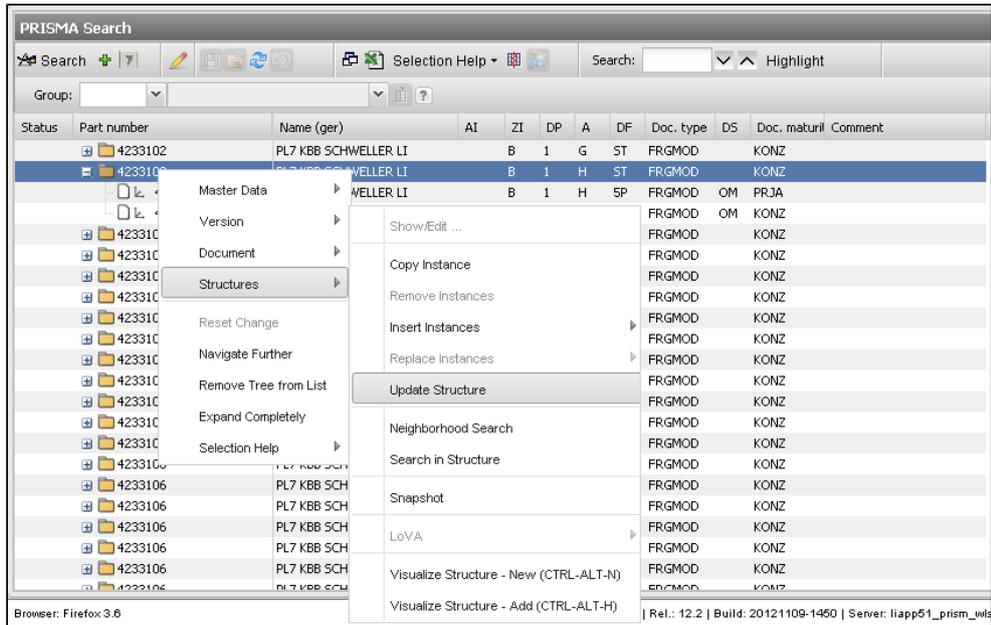
The menu item **Remove Instances** is only available for instances.

Selected instances are added to the clipboard and removed from the structure.

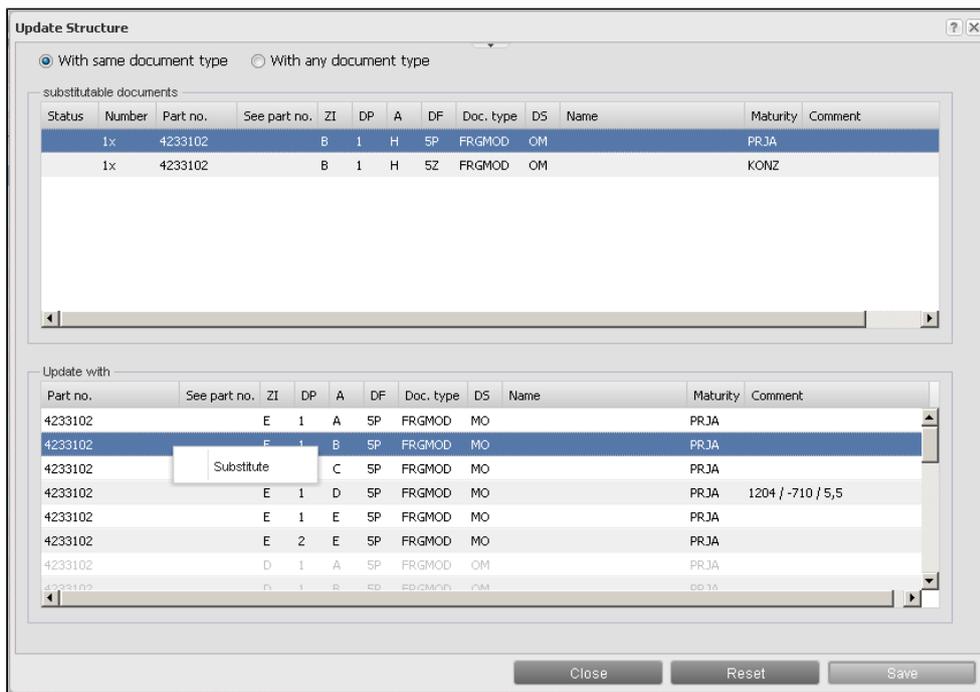
## Update Structure

If necessary, a structure list must be updated in case one of the documents should use a newer or alternative version.

The sub-menu option 'update structure', located in the context menu of a ST document search result, triggers a "update structure" pop up box.



The menu option is only for ST documents and instances of ST documents available. It is only accessible via the intranet to BMW employees.



Initially the upper list "replaceable documents" is populated with documents that are found directly under the selected structure and for which newer or alternative documents exist.

When a document is selected from the upper list, potential replacements, if available, are listed under "update with".

The radio buttons: "same document type" and "any document type" are located at the top of the dialog box. If "same document type" is selected, only documents of the same type will be offered in the "update with" section as replacements.

Different to CAs, here CAs and 5Ps can be displayed.

Greyed-out documents in the **update with** list, may not be used to replace existing documents, the tool tip explains why.

The context menu option "replace" replaces the document in the "replaceable documents" list with the one selected in the "replace with" list.

The successful replacement is mentioned in the info panel and a symbol appears in the status column.

The **Save** button makes the replacement permanent.

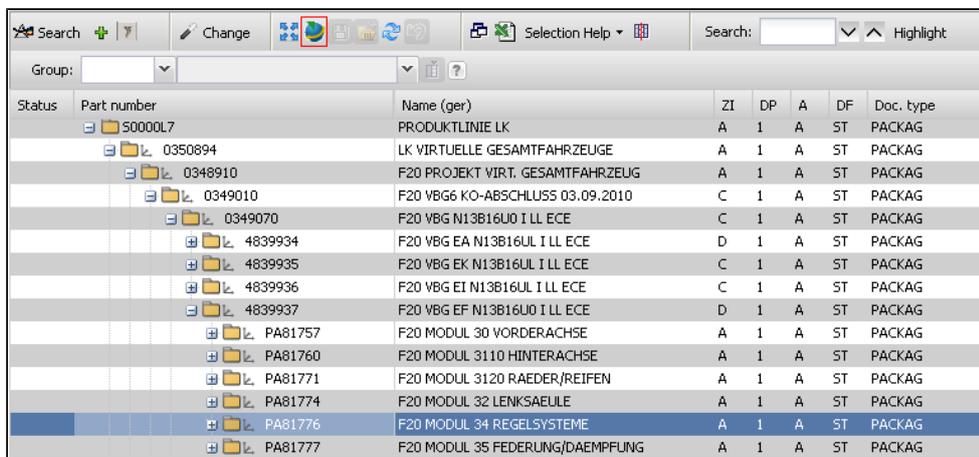
## Visualization with PDMView

Visualization with PDMView is only available to users to use the external portal.

More information about Visualization with PDMView you can find here  
<https://b2bpapp6.muc/protected/de/gdz/entwicklung/applikationen/pdmview/index.html>.

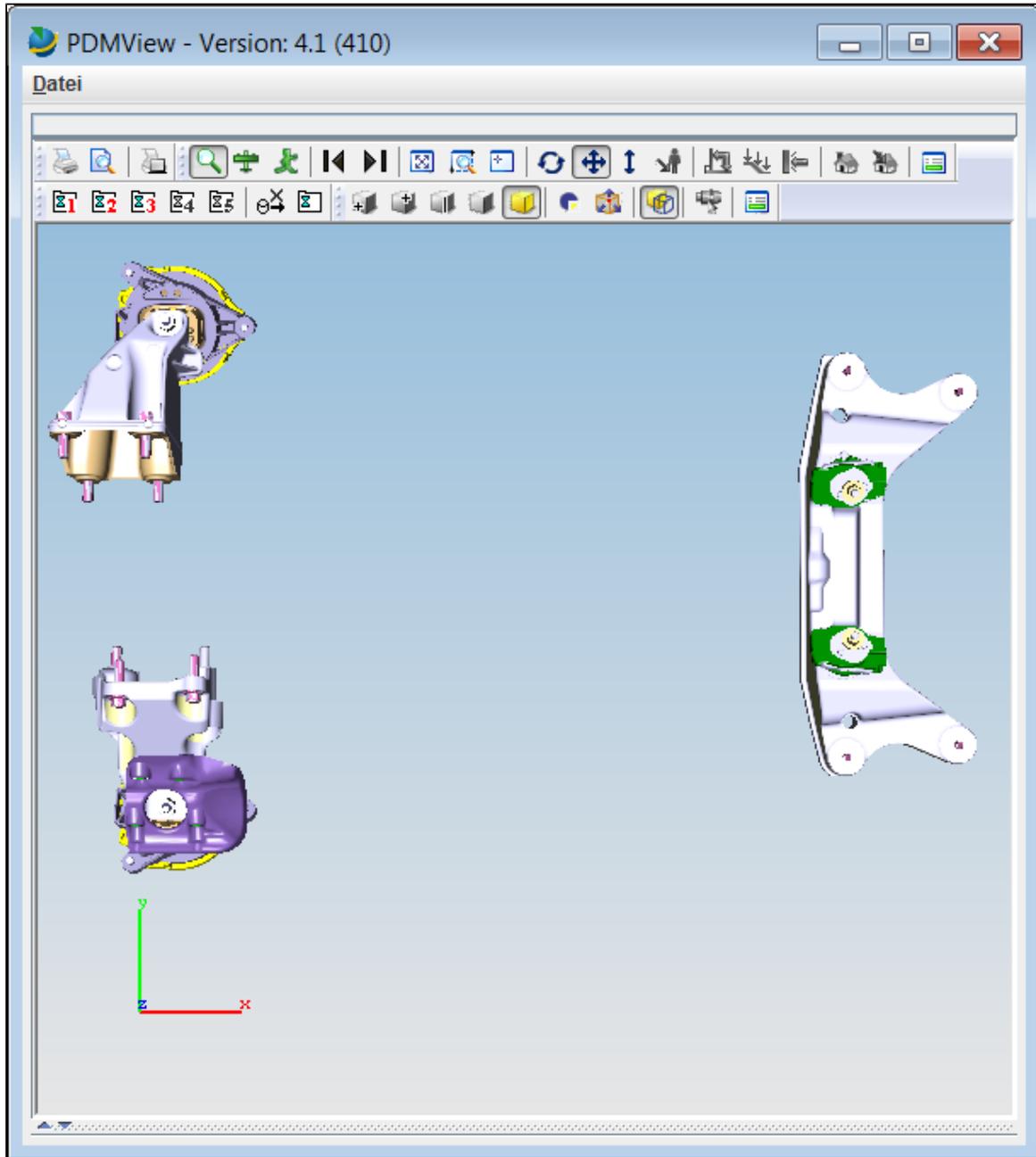
The results of a PRISMA search for single parts or structures and the results of a neighborhood search can be visualized.

Select the structure from the search results and start a PDMView by clicking the toolbar button .



Status	Part number	Name (ger)	ZI	DP	A	DF	Doc. type
	50000L7	PRODUKTLINIE LK	A	1	A	ST	PACKAG
	0350894	LK VIRTUELLE GESAMTFAHRZEUGE	A	1	A	ST	PACKAG
	0348910	F20 PROJEKT VIRT. GESAMTFAHRZEUG	A	1	A	ST	PACKAG
	0349010	F20 VBG6 KO-ABSCHLUSS 03.09.2010	C	1	A	ST	PACKAG
	0349070	F20 VBG N13B16U0 I LL ECE	C	1	A	ST	PACKAG
	4839934	F20 VBG EA N13B16UL I LL ECE	D	1	A	ST	PACKAG
	4839935	F20 VBG EK N13B16UL I LL ECE	C	1	A	ST	PACKAG
	4839936	F20 VBG EI N13B16UL I LL ECE	C	1	A	ST	PACKAG
	4839937	F20 VBG EF N13B16U0 I LL ECE	D	1	A	ST	PACKAG
	PA81757	F20 MODUL 30 VORDERACHSE	A	1	A	ST	PACKAG
	PA81760	F20 MODUL 3110 HINTERACHSE	A	1	A	ST	PACKAG
	PA81771	F20 MODUL 3120 RAEDER/REIFEN	A	1	A	ST	PACKAG
	PA81774	F20 MODUL 32 LENKSAEULE	A	1	A	ST	PACKAG
	PA81776	F20 MODUL 34 REGELSYSTEME	A	1	A	ST	PACKAG
	PA81777	F20 MODUL 35 FEDERUNG/DAEMPfung	A	1	A	ST	PACKAG

PDMView opens and the parts in the structure are displayed in the window.

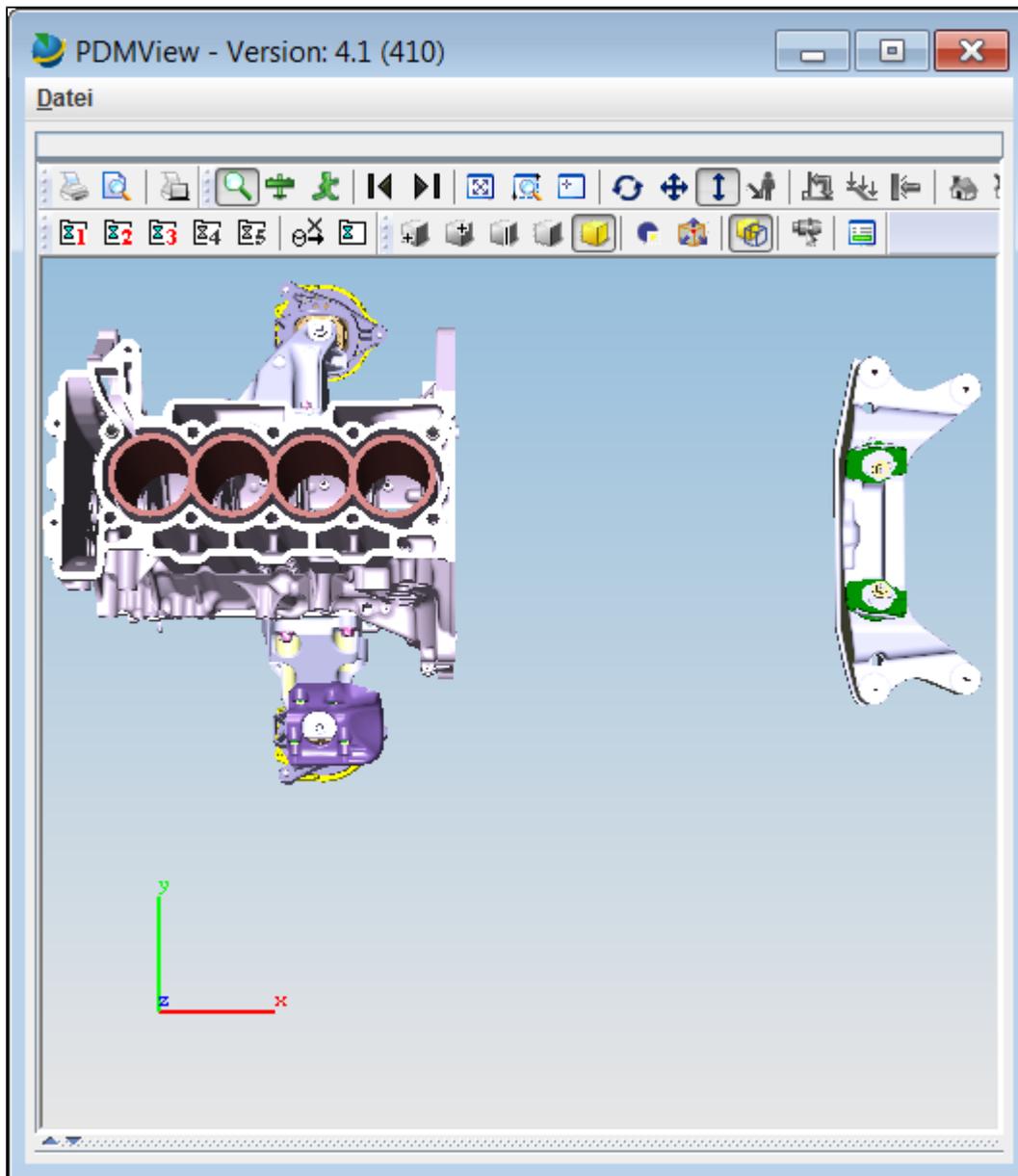


The results list and the PDMView session are synchronized. If a model from the PDM View visualization is removed, the selection in the results list is adjusted.

An additional structure (blue) is to be added to the structure that is already visualized (red). To do so, select the structure (blue) with the left mouse button while holding down the CTRL key.

PA81757	F20 MODUL 30 VORDERACHSE	A	9	A	ST
A005800	ACE DIGI REF KIN E87NF FB2	B	1	B	5B
PO27333	F20 MODUL 30.10 VORDERACHSE	A	2	A	ST
PO27335	F20 MODUL 30.40 MOTOR UND GETRIEBELAGERU	A	2	A	ST
PO46892	F20 MODUL 30.20 LENKUNG	A	1	A	ST
PA81757	F20 MODUL 30 VORDERACHSE	A	10	A	ST
POA4335	KOGR 1111/001 KURBELGEHAEUSE MODUL 41 M	A	1	A	ST

Both selected structures are automatically visualized in PDMView as a result.



Note: When PDMView is open, each selection of a structure or part causes it to be visualized immediately. If you make a selection without using the CTRL key, only the part that has just been selected is visualized.

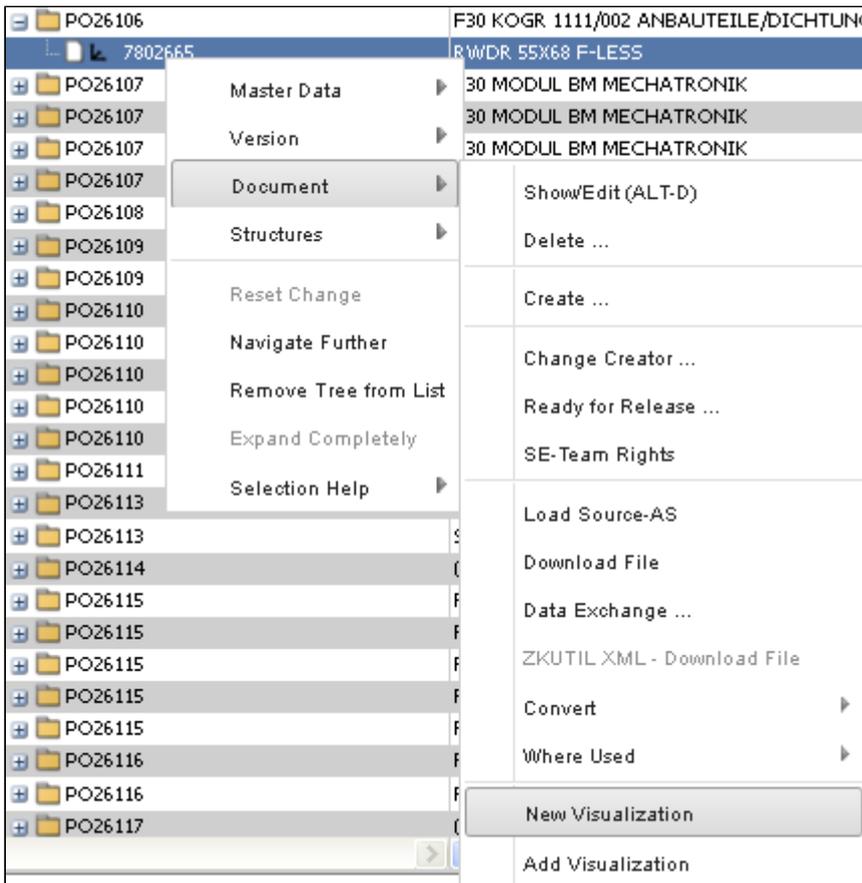
## Visualization with Vis View

Context menu entries for the visualization of documents and structures are available to internal BMW users. If not already running VisView, it will start automatically.

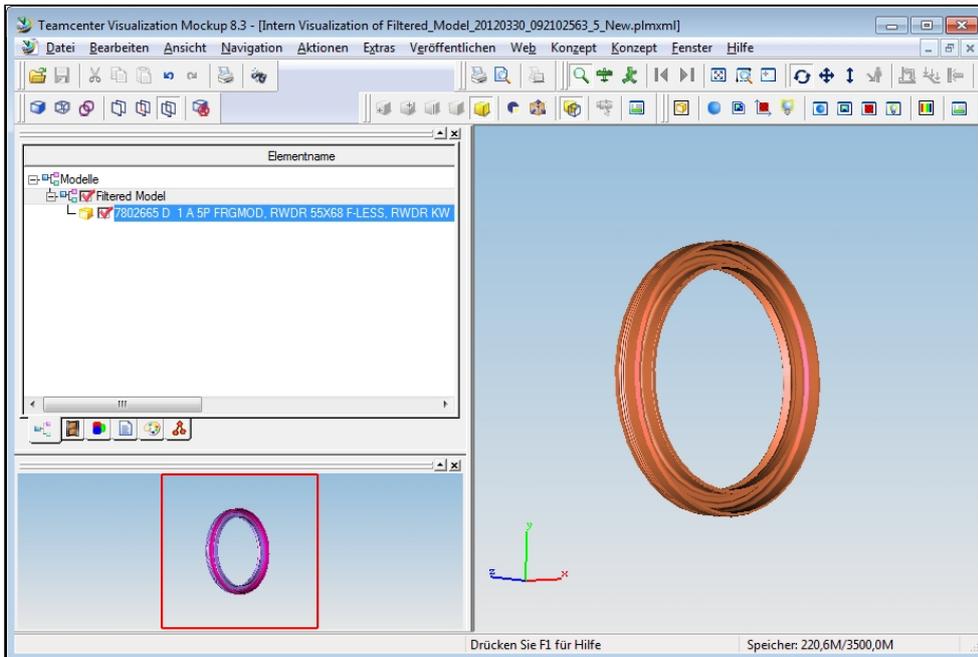
- Document visualize
- Structure visualize
- Neighborhood Search results visualize

### Document visualize

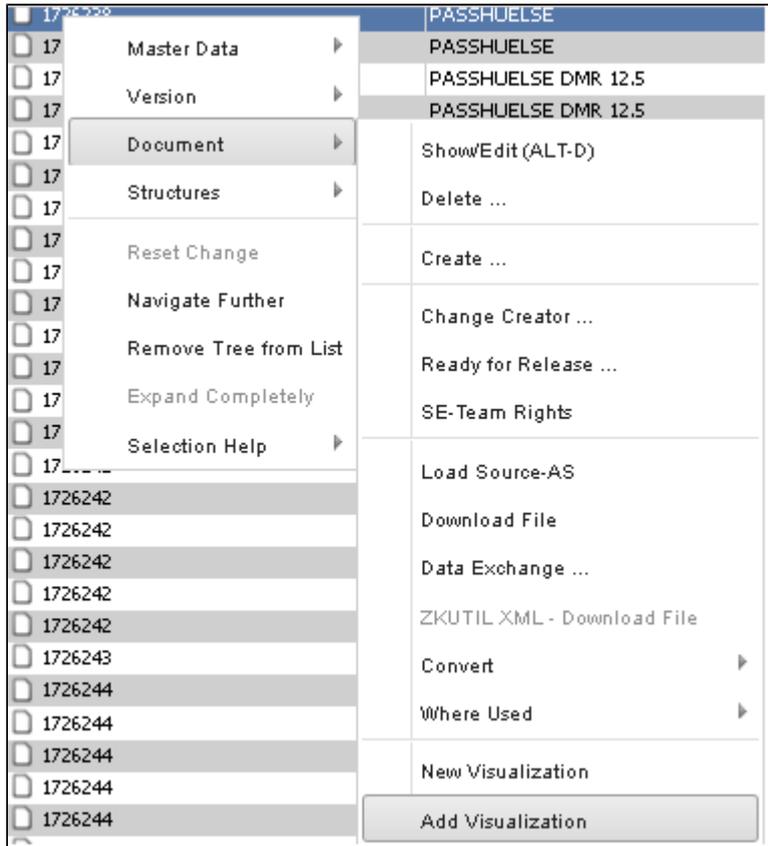
The context menu item **New Visualization** is used to visualize to the selected document(s) assigned model(s) to the viewer interface VVUtil for visualization.



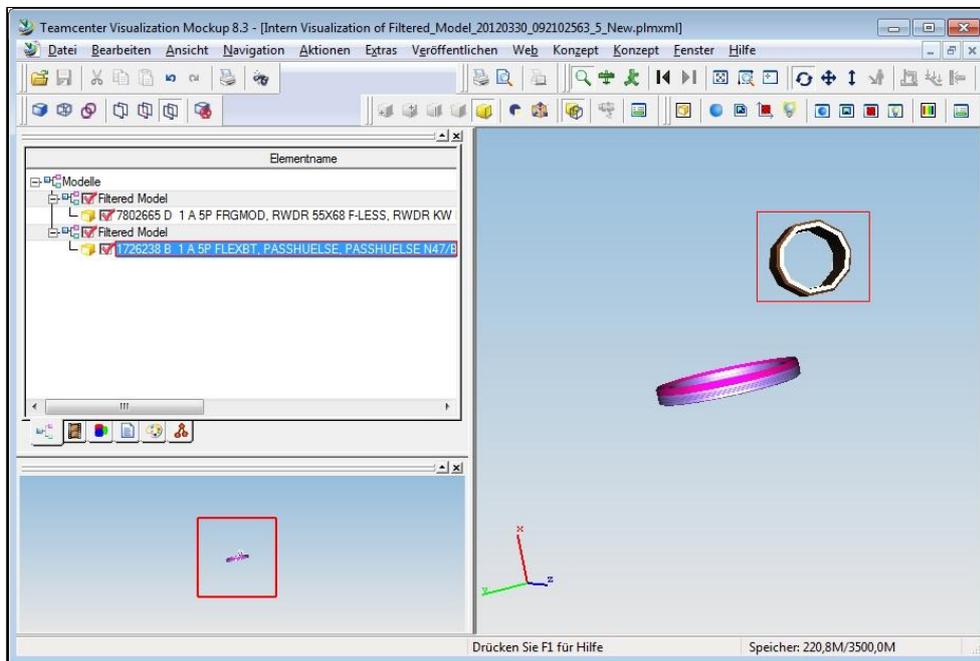
The data record of the selected document(s) displays in the left of the VisView dialog. The model with a red hook is shown graphically in the dialog.



With **Add visualization** an existing visualization supplemented by the corresponding model to an other selected document.

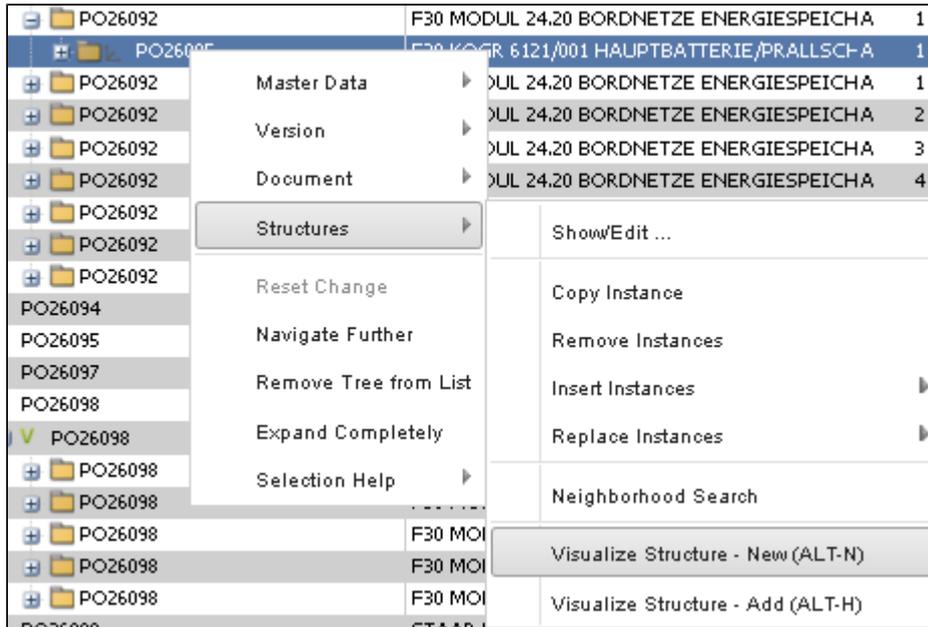


In the Vis View dialog the list is expanded to the selected documents. Furthermore, the selected model is also displayed.

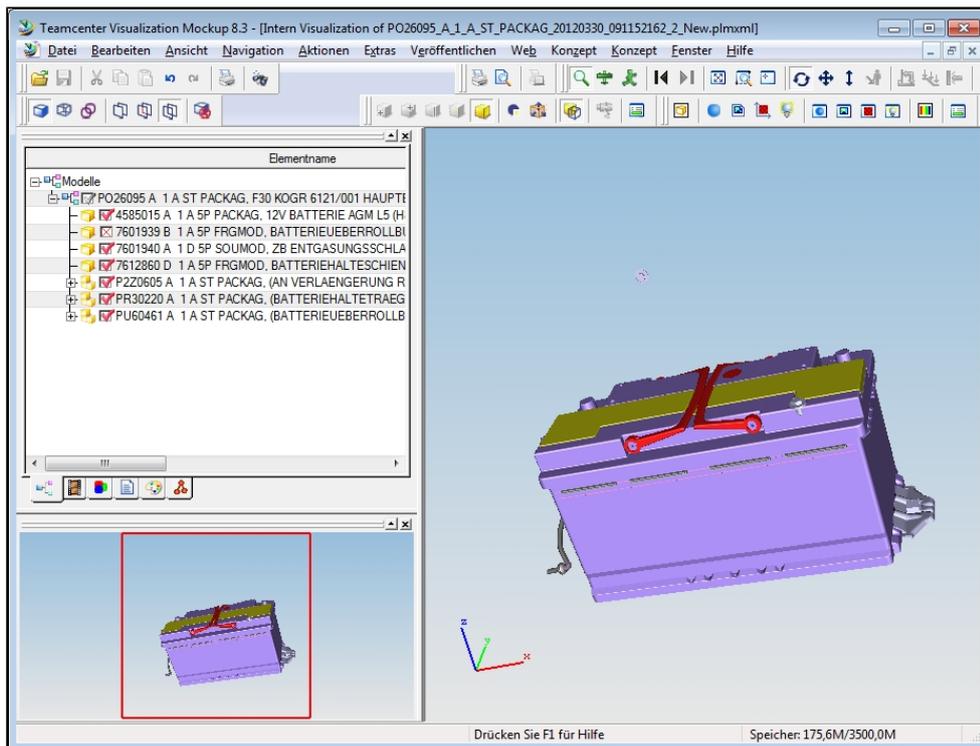


## Structure visualize

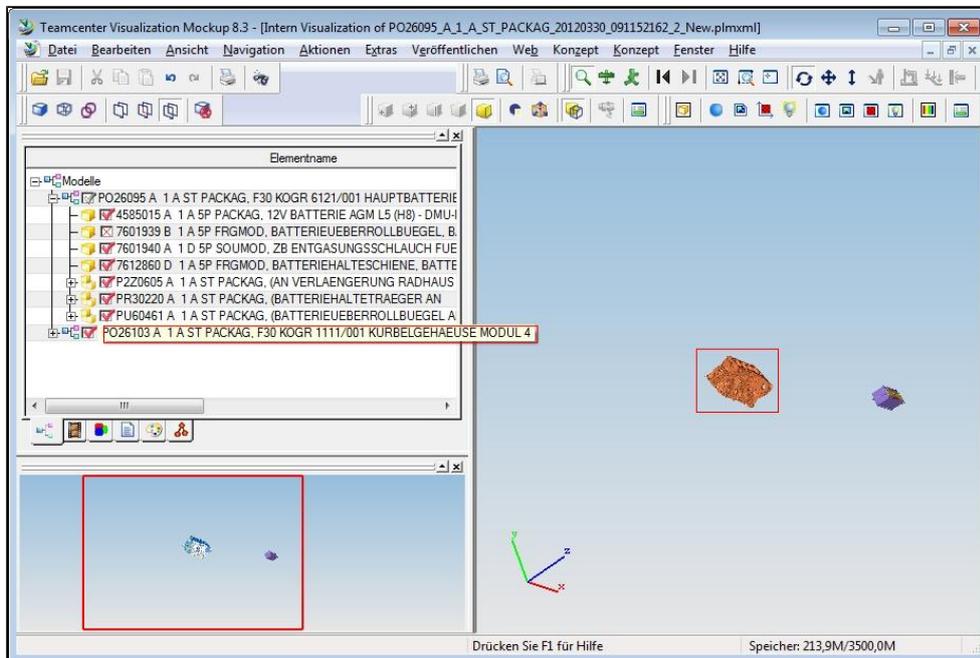
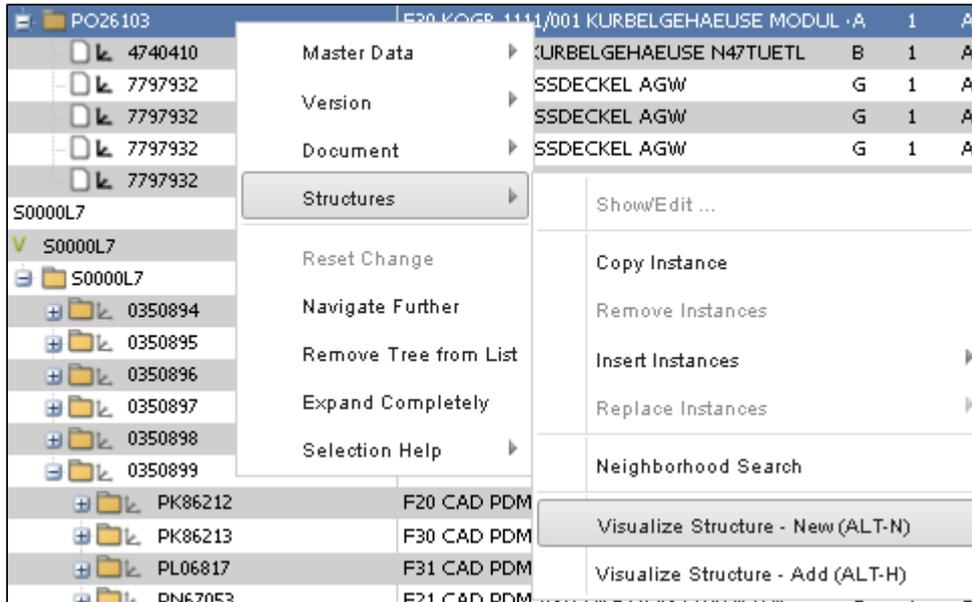
The context menu item **Visualize Structure - New** expanded the selected structure in the background and the determined structure is visualized in a new VisView session. The layout of the results list is not affected.



In the Vis View dialog the results of the selected structure is displayed in the tree. The selected objects (red hook) are represented graphically. A red cross in front of a tree element refers to missing permissions for the visualization of the part.



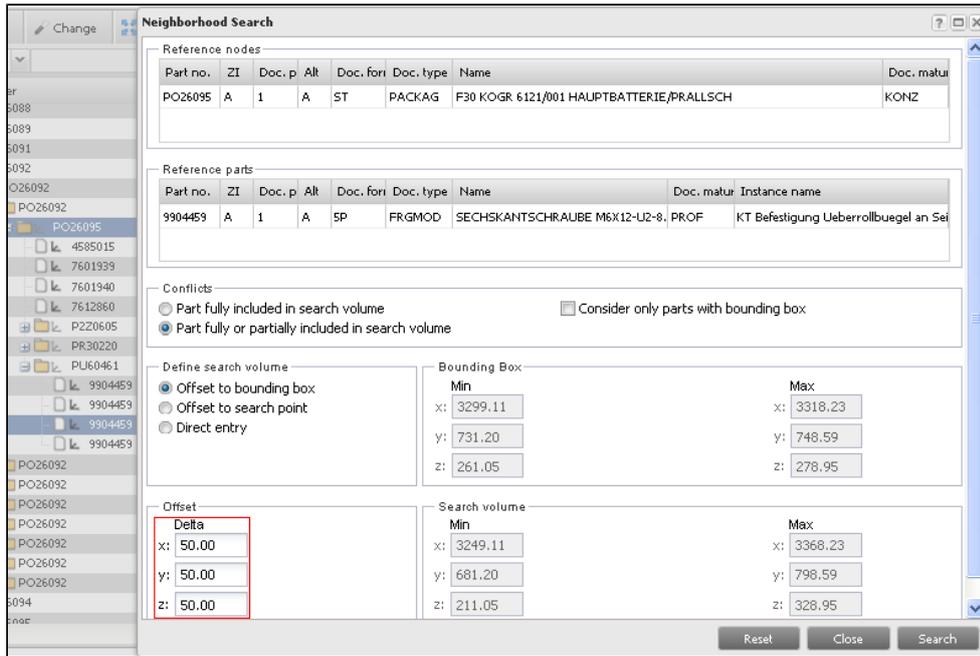
**Visualize Structure - Add** adds determined structure to an existing structure VisView session.



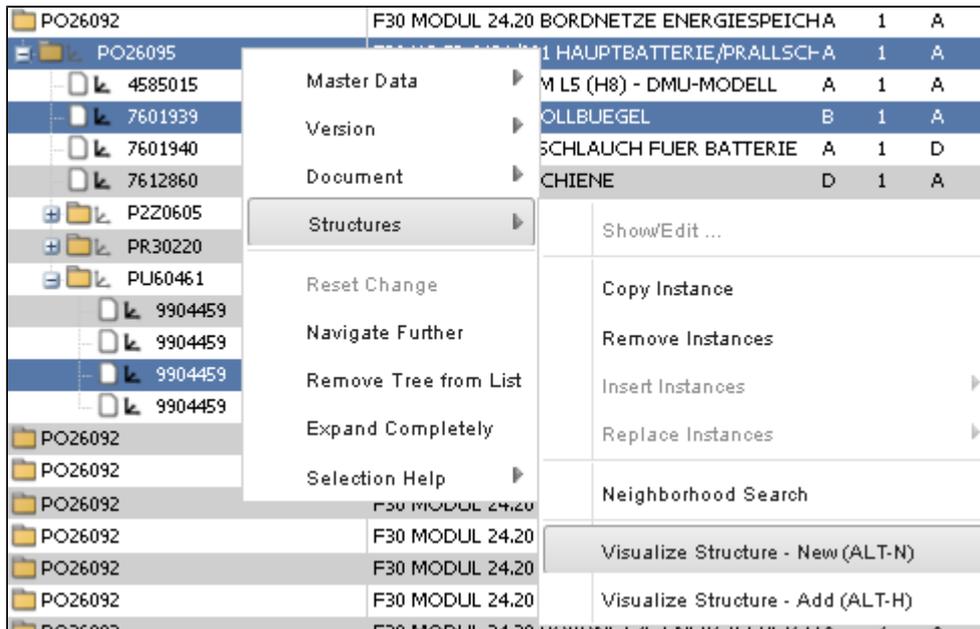
### Neighborhood Search results visualize

Mit einer \*Nachbarschaftssuche\* können ausgehend von einem Bauteil die benachbarten Bauteile in einer Struktur (ST-Dokument) ermittelt werden.

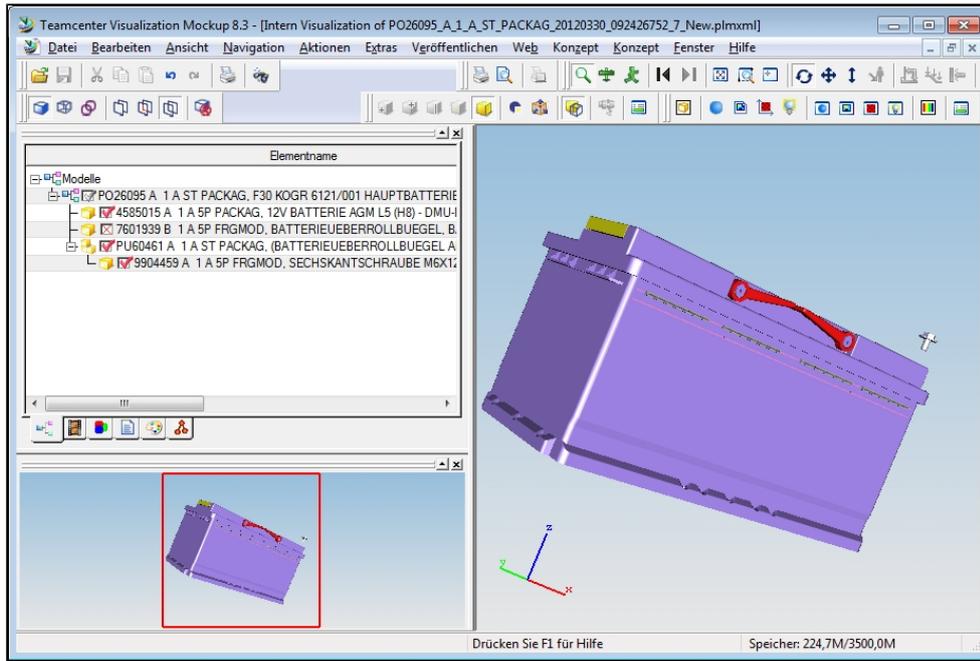
With a **Neighborhood Search** may be found all neighboring parts in a structure (ST document), starting from a part (CA/5P documents).



After the result of a \* neighborhood search \* can be passed to the viewer interface VVUtil.

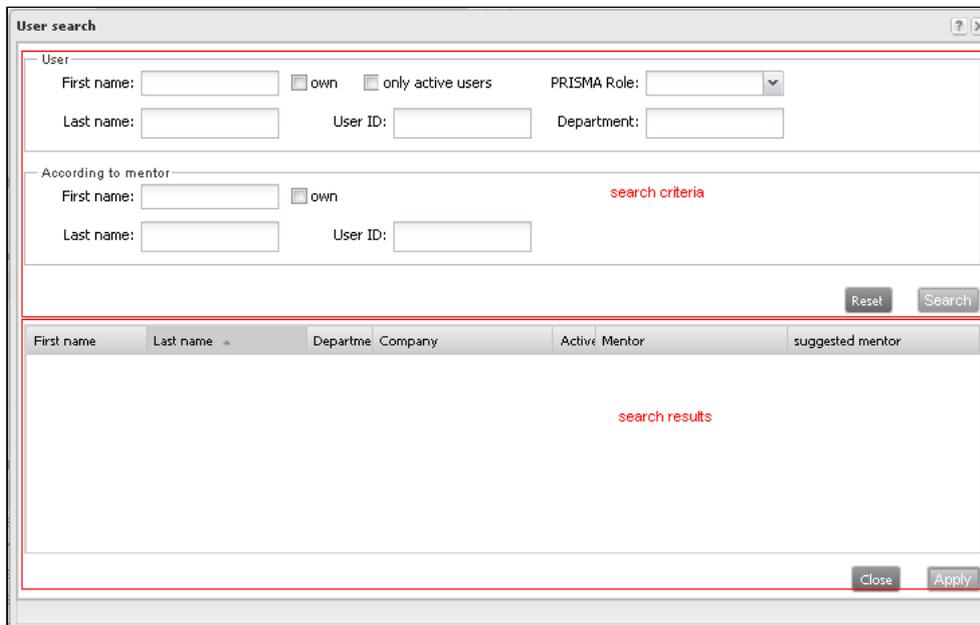


In the Vis View dialog the reference part and the parts identified in the search volume are displayed.



## User Search

The user search function can be started in the dialog **User Administration**, **SE Team Rights** and **Change Creator**.



Different attributes, such as name (first and/or family name), department and other user details, are available as search criteria. Wildcards ("\*") are supported.

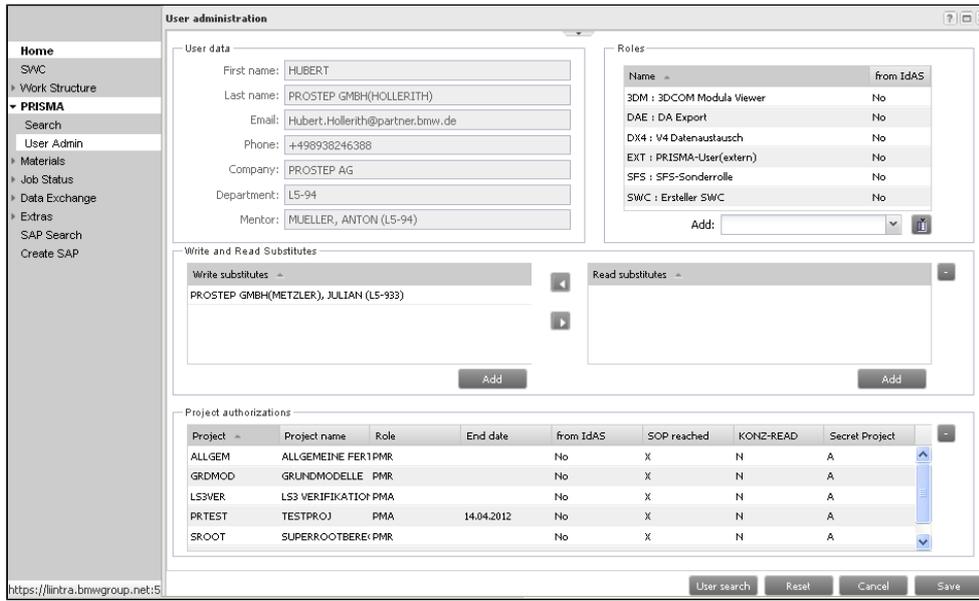
You can restrict a search to yourself without entering your name by selecting the options **self** and **Active users only**. The option **Active users only** is the default.

The search hits are listed in the lower dialog area. The user data of a user selected from the hits is copied to the calling dialog by clicking **Apply**.

## User Administration

User administration functions are used for managing the PRISMA user data.

The side menu item **User Admin** opens the dialog for user administration.



The data of the registered user is displayed in the dialog areas "User Data", "Roles", "Write and Read Substitutes" and "Project authorizations".

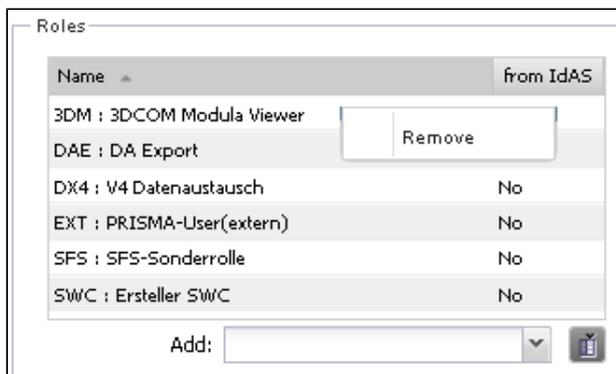
You can use the **User search** button to search for another user in the PRISMA database whose data is to be managed.

The dialog areas "Write and Read Substitutes" and "Project authorizations" can be expanded and collapsed. Collapsing extends the other dialog areas correspondingly.

Clicking Save saves the changes made in the dialog areas.

### Roles and Project Authorizations

The dialog area "Roles" in the "User administration" dialog shows the roles of the user applicable to all projects.



One or more roles can be withdrawn using the context menu item **Remove**.

The "Add" selection list contains the roles that are available. Clicking the icon  a selected role to the user as a personal role.

The dialog area "Project Authorizations" shows the authorization for individual vehicle projects.

Project	Project name	Role	End date	from IdAS	SOP reached	KONZ-READ	Secret Project
ALLGEM	ALLGEMEINE FER1	PMR		No	X	N	A
GRDMOD	GRUNDMODELLE	PMR		No	X	N	A
LS3VER	LS3 VERIFIKATIO	PMA		No	X	N	A
PRTEST	TESTPROJ	PMA	14.04.2012	No	X	N	A
SROOT	SUPERROOTBERE	PMR		No	X	N	A

You use the combination of a vehicle project (column: "Project/Project Name") with a role to control whether a user has write (PMA in the "Role" column) or read (PMR in the "Role" column) project authorization.

Project authorization can only be assigned through the PRISMA mentor (administrator for BMW external users) or by an on-site PRISMA administrator.

### Read- and Write-authorized Substitutes

Each user can add or remove their own read- and write-authorized substitutes.



Clicking the **Add** button opens the user search – see the "User Search" section below.

You can save 1 write-authorized substitute and up to 15 read-authorized substitutes in your profile. The arrow buttons can be used to change a read- or write-authorized substitute.

One or more read-authorized substitutes or the write-authorized substitute can be removed using the context menu item **Remove**. The process is confirmed by acknowledging a confirmation message.

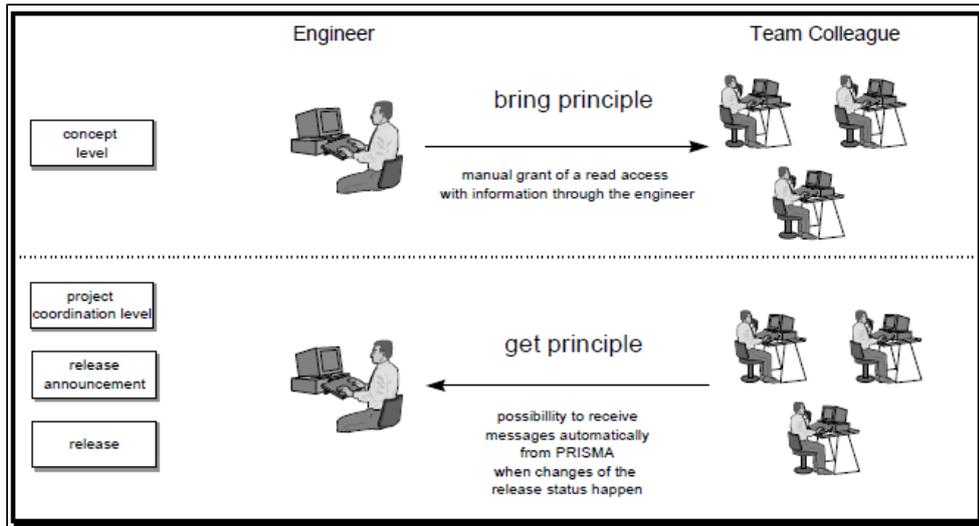
### User Search

The [User search](#) button opens a dialog with which a user can be searched for in the PRISMA database. The user data of the search result is copied to the "User administration" dialog or to the "Write and Read Substitutes" dialog area, where it is displayed.

## Messages

Internal communication in PRISMA happens via messages. In the concept phase a designer is able to notify another user of construction progress. The shared information is non-binding and at any time subject to change. The user is assigned reader permission for the designer's model and a notification is sent.

Messages regarding changes in maturity are automatically created after the project coordination phase has been reached. Other employees can receive messages automatically by creating a message profile.



- Message Profile
  - Add profile
  - Remove profile
  - Add criteria
  - Remove criteria
- Show Messages

### Message Profile

The function **PRISMA - Messages - Message profile** allows a user to define the criteria for which documents will send him messages.

The profile is displayed as a tree. Every profile has one or more rows that may be displayed or hidden.

A logical AND is inserted between each of a row's entries. All of the entries' combined criteria must be met.

The number of messages a user will receive is directly related to the number of criteria a document must meet. More requirements (i.e. columns filled in) means less messages.

A logical OR is inserted between the rows of a profile. Each row is evaluated individually. More rows means more messages.

Status	Message profile	Part no.	KOGR	1st type	Doc. type	Project	Maturity	NAEL
	CP3	8507400	1010					
	PRIVAT		1010			F20		E12345
	0815	1234567			FRGMOD			
		2345678						

Add profile

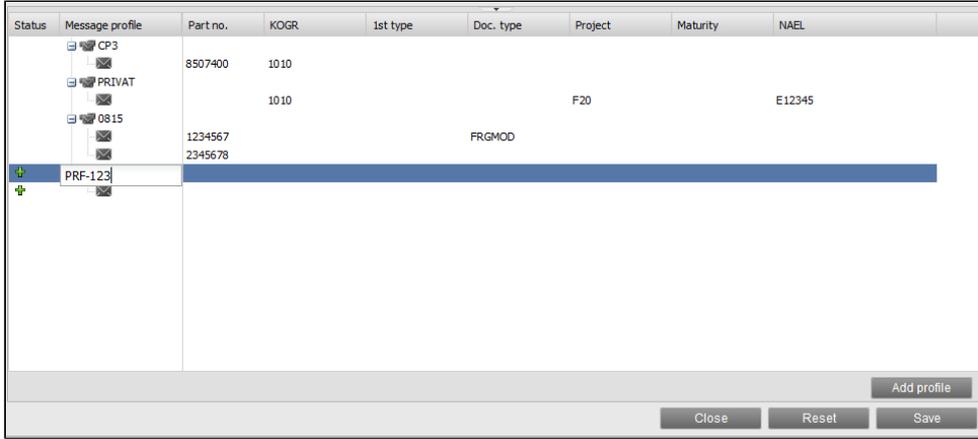
Close    Reset    Save

### Add profile

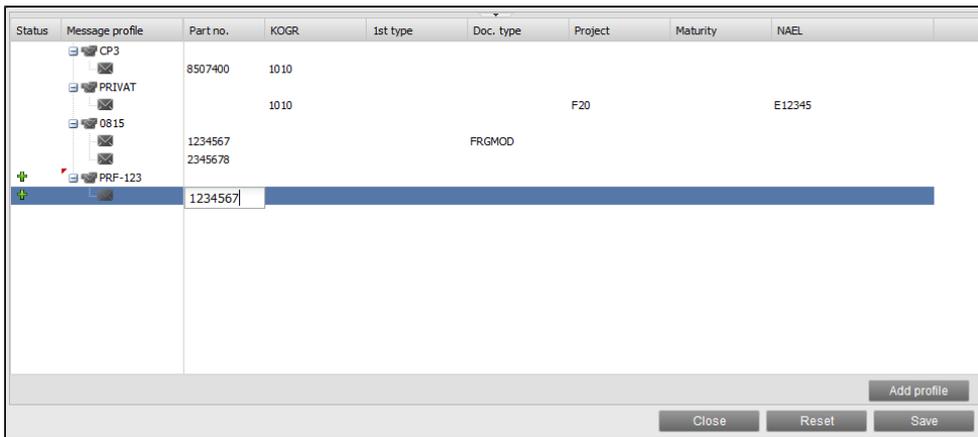
The **Add Profile** button, when clicked, adds a new profile with an automatically generated name (e.g. PROFIL1)



This name, when clicked, opens an entry field where the user may rename the profile (up to 8 characters are allowed)



A further step requires that minimum 1 criteria be filled in. Simply click on the criteria field and enter a value.



Changes are made permanent by clicking the "Save" button.

## Remove profile

Message profiles have a context menu. The context menu function 'remove' marks the profile for deletion. To delete the profile click "Save".

## Add criteria

The message profile context menu has the option "add criteria". This function enables a user to add a new row to a profile. This new row may then be updated with the required criteria.

## Remove criteria

To remove a criteria, open the context menu at the row in question. The function "remove" will mark the row for deletion.

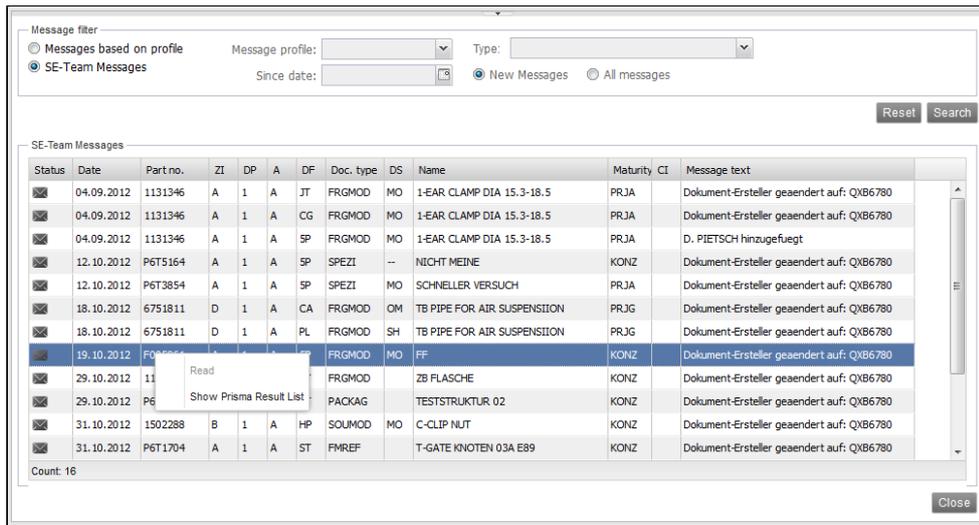
## Show Messages

The function **PRISMA - Messages - Show Messages**, shows those messages created in the last 30 days that match the user-defined profile.

The message filter, located in the upper half of the dialog, can be configured to search for messages in one of two ways: either using the message profile or, SE Team Messages. Simply set the required radio button. The SE Team Messages display shows messages regarding documents to which the user has obtained read permission through SE Team membership. For an message search using an message profile a profile must be selected from the related menu. Message type can be selected in the respective menu with the following search options :

- part document
- tool document
- part version
- tool version

Messages may be further filtered by age. The radio button "new messages" restricts the search results to unread messages, whereas "all messages" finds messages irrespective of whether or not they have been read. The found alerts appear listed in the lower half of the dialog.

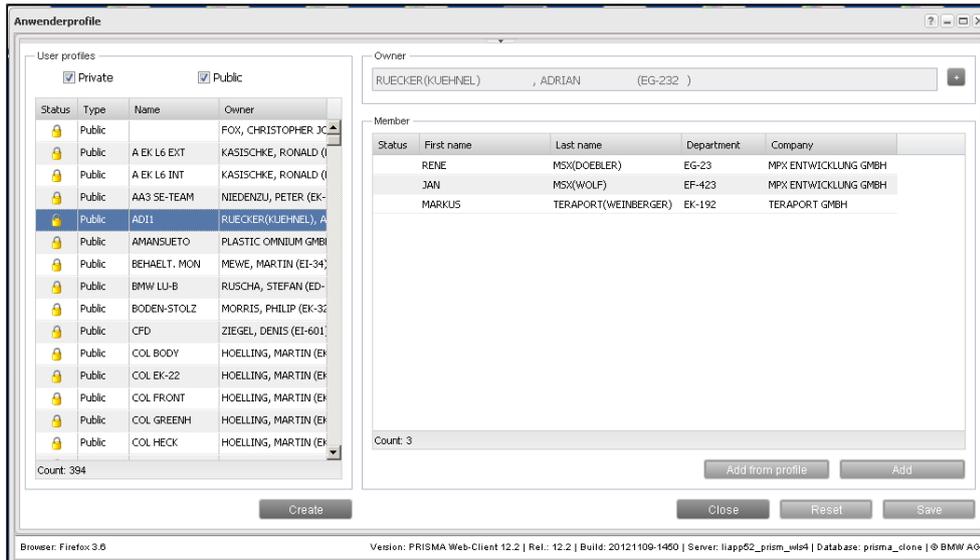


A context menu is available for the search results. The menu offers the functions **Read** and **Show Prisma Result List**. The **Read** function is active for messages found with the message profile. This function causes all selected messages to be marked with an icon in the status column. Changes take effect immediately, and reverting an message to unread is not possible. The **Show Prisma Result List** function causes all selected documents and versions to be added to all documents currently loaded in the results display

## User Profiles

- [Create User Profile](#)

Using the function **PRISMA – User Profiles**, lists of users are compiled and managed. These lists are used in the awarding of SE Team rights. It is possible to award these rights to the whole list.



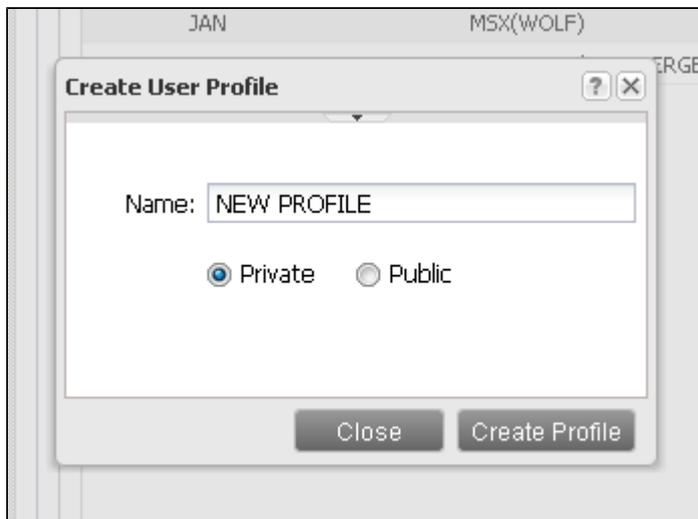
In the left part of the dialog all accessible private and/or public user profiles are shown. The displayed list can be modified by changing the filter (private or public).

The right upper dialog area shows the main data of the selected profile.

In the lower part shows the members of the profile.

## Create User Profile

A new profile can be created by clicking the button **Create**, which opens a creation dialog with input field for profile name and visibility (public or private).



After creation, the new Profile is added to the profile list and will be automatically selected. The values for the owner will be taken from user data and cannot be modified.

To add users to the profile, the buttons in the lower right corner of the dialog can be used.

- **Add** (Add a new user to the member list)
- **Add from Profile** (Selection of one or more users of another profile)

Every list entry offers a context menu with the following functions:

**Delete** (Deletes the selected user from the list)

**User Info** (Shows information to the selected user)

Modified entries will be marked with symbols in the status column. Explanations you will find [here](#)

Modifications will be saved by pressing the button **Save**.

## Status Icons

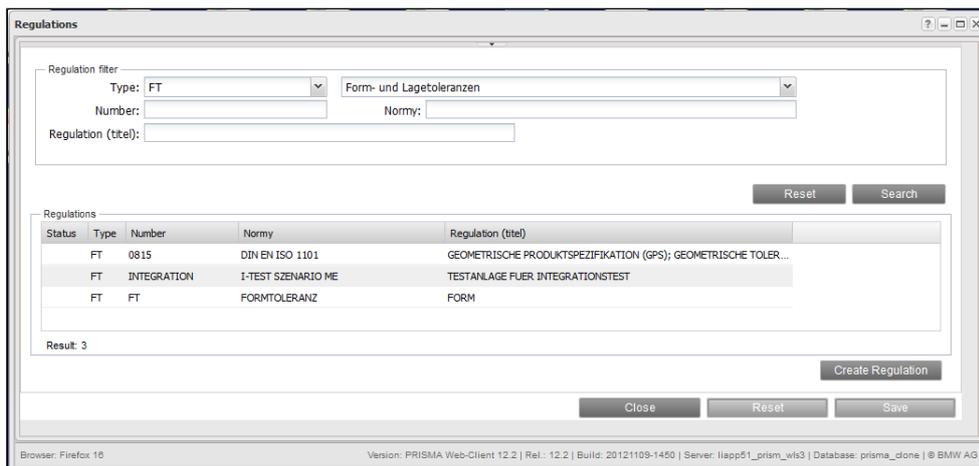
The following table describes the possible status with corresponding symbols.

Symbol	Beschreibung
	Dataset was added but is not yet saved
	Dataset is marked for deletion
	Dataset was modified but is not yet saved
	Data was written successfully to database
	Error in writing data to database

## Regulations

- Show/Edit a Regulation
- Create Regulation

Generating and editing regulations in PRISMA is carried out through the function **PRISMA - Regulations**. Prerequisite is the role **GDP**.



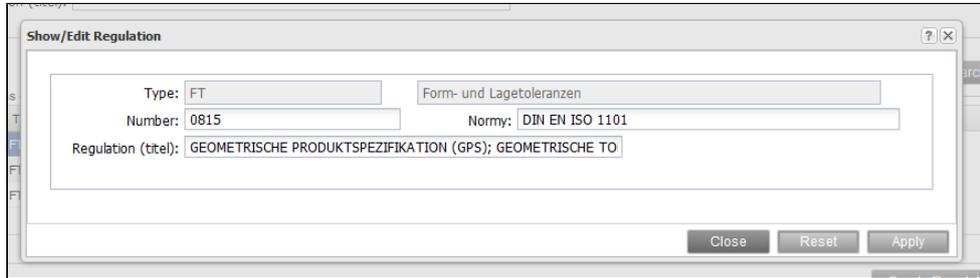
Existing regulations can be searched using the regulation filter. Filter criteria can be entered in the upper dialog area. Clicking the button **Search** will activate the filter. The filter result is listed in the lower dialog area.

### Show/Edit a Regulation

Every entry of the result list offers a context menu. The function **Show/Edit** opens a popup dialog with the regulation properties. The user is able to change the following properties:

- Regulation
- Characteristic
- Regulation title

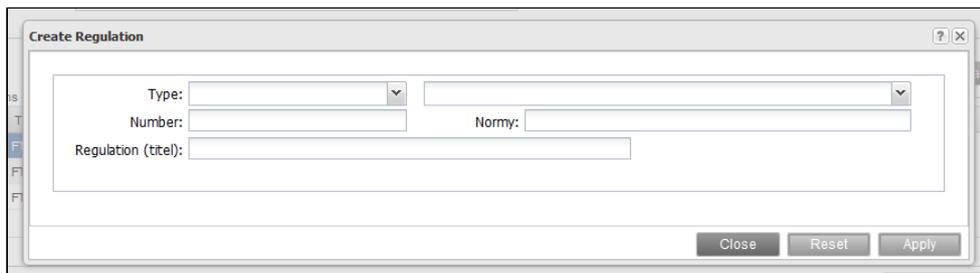
A change of regulation type is not possible in hindsight.



After accepting, the dataset will be marked as changed  
 The function **Delete** will mark the selected data set for deletion.

## Create Regulation

The button **Create Regulation** opens a dialog to enter all properties of the new regulation. The button **Save** will create the regulation and add it to the result list.



## Competition

- Prerequisites for the generation of a competition:
- Special features of a competition:
- Search competition
- Show/Edit Competition
- Create New Competition

Competitions between several partners of the BMW Group for development of parts, tools, and concepts can be generated and edited in PRISMA. All CA models saved in PRISMA by these participants are invisible for the competitors. The following basics and guidelines describe the functionality and the work with competitions:

Item	Description
Definition competition	A competition exists between two or more BMW partners who are developing the same part or assembly. A development partner could be a group of companies, a single company or a single person.
Explicit start of a competition protection	Any PRISMA user who is involved in a competition can start the protection for his models. No other competitor will then have access to these protected models.

Unlimited access for the rest of the world	All other PRISMA users still keep their access rights according to the standard PRISMA rules. This concerns all BMW internal users, PRISMA users of the same company and all external users who do not belong to the competition.
Competition protection is optional	It not obligatory to start the competition protection. If a user generates a part number he will get a note about this possibility.
Competition protection is stronger than a PRISMA access right	Competition protection is stronger than all ⚠ PRISMA access rights. It is not possible to by-pass the competition by granting a SE-team right, substitute rights or others.
Part number is the basic	The competition protection can be started for each part number and is valid for all corresponding documents (existing or new generated). It is independent from drawing index, maturity, document format, document type and other attributes of the documents. It is not possible to switch off the competition for any document of this part number.
No protection for meta data	Geometric models are protected only. The meta data like name of the part number, maturity or comments are visible.
BMW users can't take part	BMW internal PRISMA users can't take part in a competition.
Competition are temporary limited	A competition is temporarily limited until a given date. After this date the protection will be finished. All models of the competition will be visible. The owner of the competition can extend the final date. He will get a note some time before the final date.

### Prerequisites for the generation of a competition:

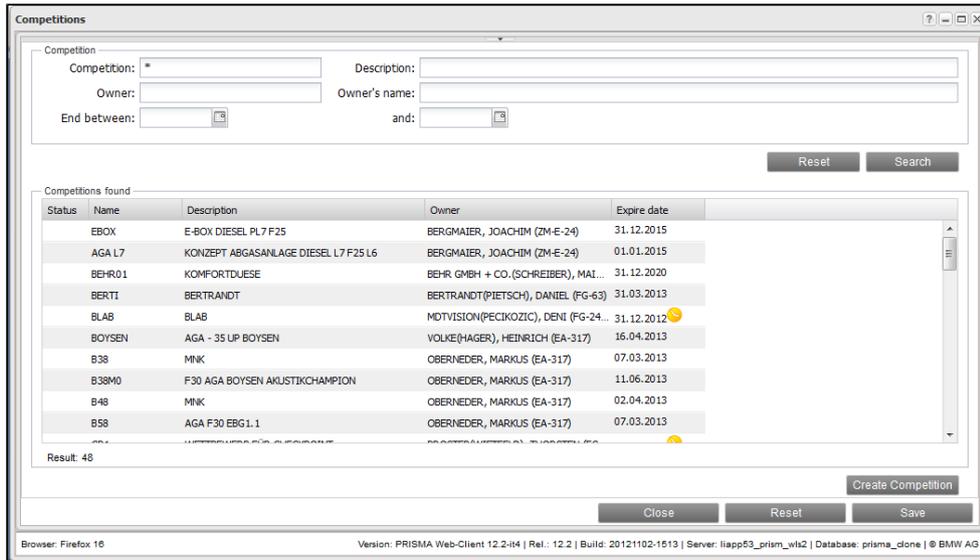
- A user needs the PRISMA role "SNS" (part number protection) for generation and management of competitions. The substitute user needs this role as well.
- A user has to belong to a company, which takes part in a competition or has to be assigned to competition if he wants to protect a part number.

### Special features of a competition:

- Documents with competition protection are not included in the automatic CAD process for the project cache
- If a part number is protected subsequently it is possible that models of this part number are available in the project cache for some time.
- If a user who takes part in a competition creates a new part number he will get a note about the chances to protect the part number.
- After the end of a competition the protection is stopped automatically.

### Search competition

Competitions are maintained with the function **PRISMA — Competition**. The dialog offers the possibility to search existing competitions. For this purpose, the search can be limited by suitable criteria in the upper half of the dialog. Clicking the button **Search** will start searching. The results are listed in the lower half of the dialog. The entries have a context menu with the functions **Show/Edit** and **Delete**.

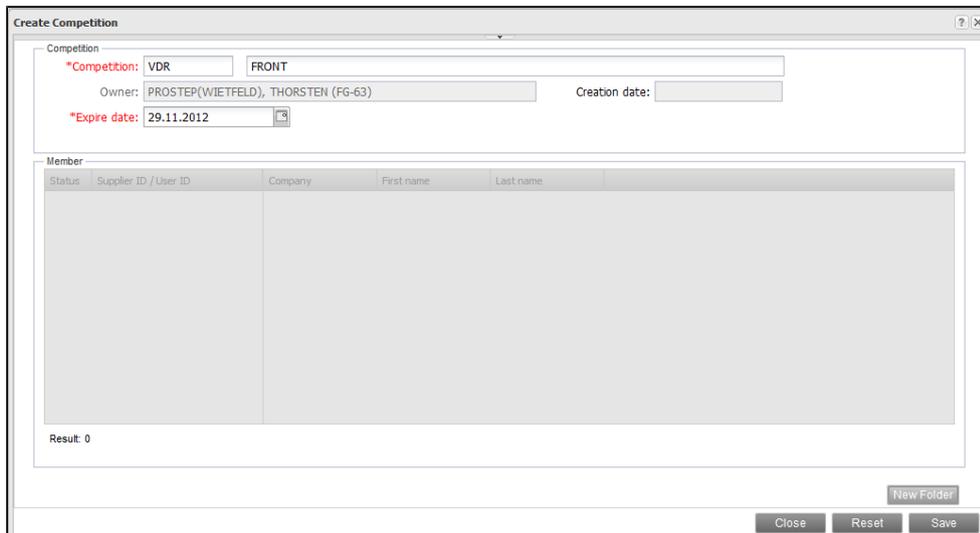


**Show/Edit** opens a maintenance dialog for the selected competition.  
**Delete** marks the the selected competition for deletion.  
The button **Create Competition** opens a [dialog](#) to create a new competition.  
The button **Save** will save the changes permanently in the database.

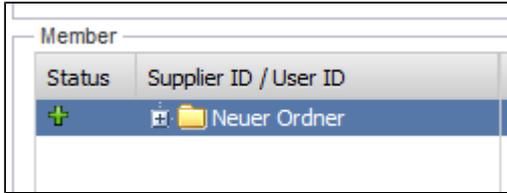
## Show/Edit Competition

## Create New Competition

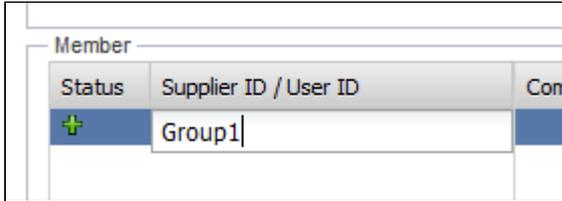
New competitions are will be created in two steps. The first step creates the competition. The master data of the competition has to be entered. This includes the the code end the end dte of the competition.  
Other fields are filled automatically. The button **Save** completes the operation.



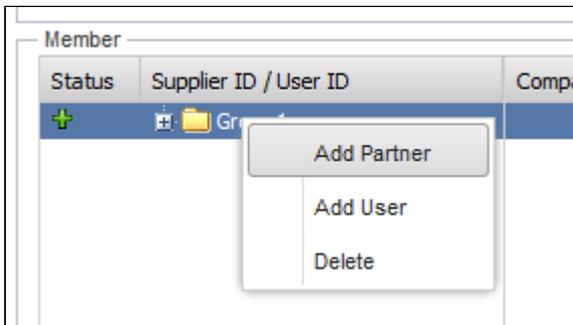
In the following step, the members have to be added to the new and empty competition. The button **New Folder** will add a new folder.



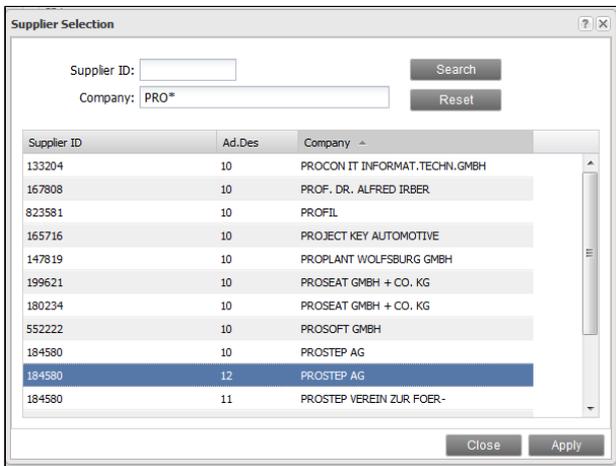
Clicking on the folder name will open an input field to enter the new name.



The Folder has a context menu with the entries **Add Partner**, **Add User** and **Delete**.



**Add Partner** opens a selection dialog to search for a development partner, which should be added to the folder.



It is also possible to add a user directly to the folder. **Add User** will open a selection dialog for users.

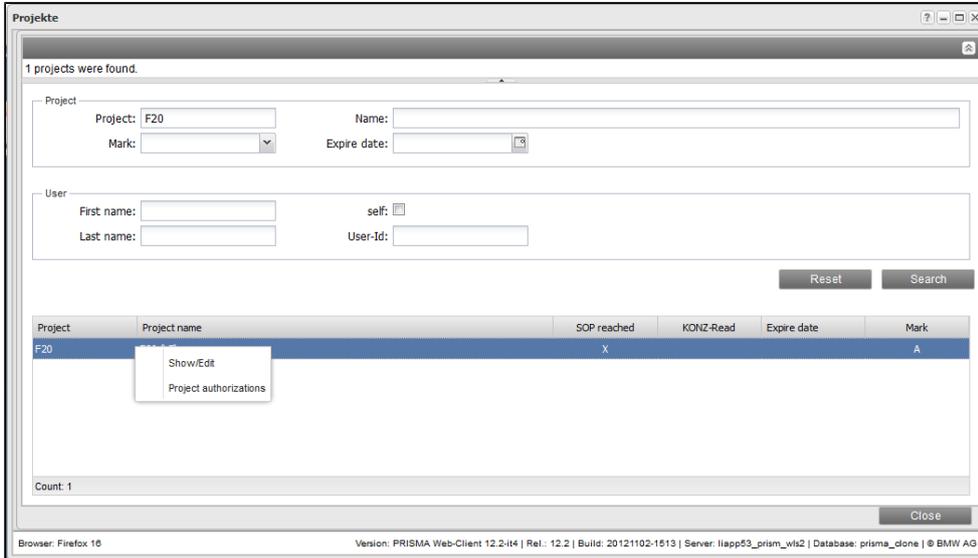
**Delete** will mark the folder for deletion.

## Projects

- Search Projects
- Edit Projects
- Project Authorizations

### Search Projects

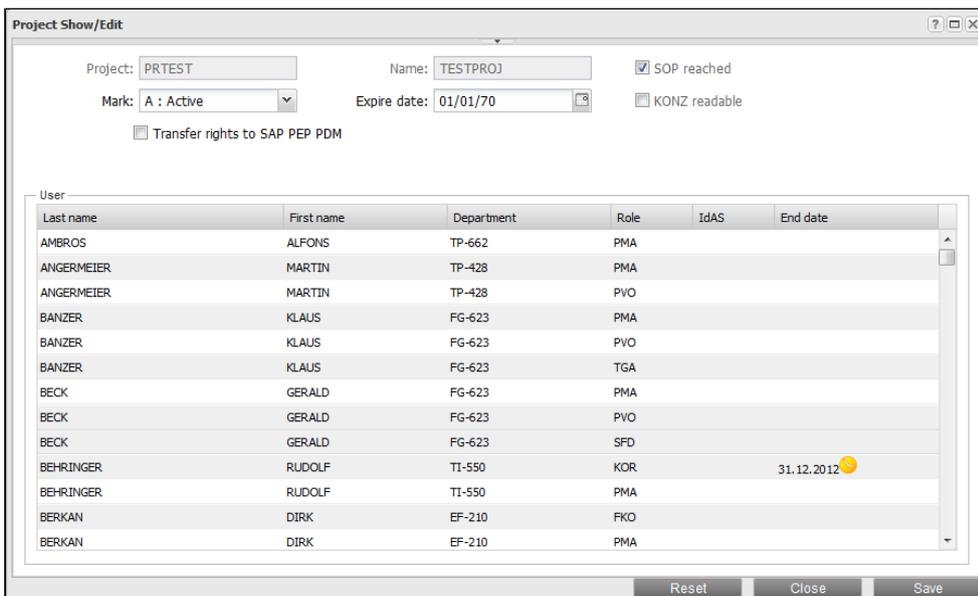
In the upper half of the dialog search criteria could be entered. The button **Search** starts the project search.



The search result is listed in the lower half of the dialog. Each entry offers a context menu with the following functions:

Funktion	Beschreibung
Show/Edit	Opens the maintenance dialog for the selected project
Project authorizations	Opens a dialog to edit the project authorizations

### Edit Projects



### Project Authorizations

