



PTC Product Focus: A) [Pro/TOOLMAKER 5-Axis Option](#)  
B) [New Product Introduction using Windchill ProjectLink](#)

Tips of the Month: A) [Comparing Parts, Assemblies and Drawings in Pro/ENGINEER](#)  
B) [Creating and Reusing NPI Templates](#)

Announcements: [Most Recent Announcements](#)

Upcoming Events & Training Schedule: [Events & Training Schedule](#)

## PTC Product Focus

### Pro/TOOLMAKER 5-Axis Option

[Click Here To View](#)

[Back To Top](#)

## PTC Product Focus

### New Product Introduction using Windchill ProjectLink

#### Introduction

More than 75% of leading product development companies use some sort of formal New Product Introduction (NPI) processes that enable them to bring products to market more efficiently. While methodologies such as PACE and Stage-Gate help these companies create a framework for their NPI process, they are still struggling to get cross-functional teams to fully adopt the NPI process guidelines. Windchill ProjectLink can enable companies to overcome this challenge by allowing cross-functional teams to speak a common language and automating critical business processes to ensure consistent and repeatable product development. It also provides management with visibility into the product development pipeline.

## Benefits

Before we explore the critical capabilities of ProjectLink, let's understand the value of a formal NPI process. Companies today face a number of challenges such as time to market, product development efficiency and costs & declining product quality due to shortened development cycles. A new product introduction process when effectively deployed and adopted can help companies overcome these challenges. Some clear benefits from an optimized NPI process include –

### **Products Introduced on Time**

A NPI process can not only shorten the time from a product's concept initiation to its release to manufacturing, it can also manage the change and lifecycle for various deliverables related to the product.

### **Higher Productivity**

Productivity can be enhanced by capturing and automating company specific new product introduction steps and reducing time spent on non-value add activities.

### **Lower Project costs**

A mechanism to define, plan, track and manage project cost can result in an increase in the number of projects completed on-budget and identify and eliminate repeating activities that add to project costs.

### **Maximize Revenue**

Greater revenue can be realized from new products by focusing on the most critical quality initiatives and achieving a timely market introduction of the complete product.

## Critical Capabilities of ProjectLink

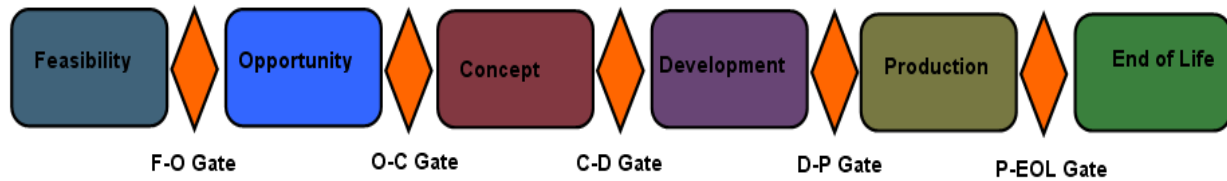
Windchill ProjectLink provides numerous critical capabilities that allow companies to define and implement an effective new product introduction process.

- Single, Web-based, structured, cross-discipline product data solution for integral management of complete product and project data
- Deliverables-based project management
- Best Practice (PACE and Stage-Gate) project template capturing plan, workflow, team, assignment, repository folder structure and document templates
- Integral project scheduling, execution, and status reporting, as well as milestone, deliverable, and cost tracking
- Cross-project and initiative reports, such as dashboard, scorecards, bubble charts, pie-charts, and stack charts provide current project data and real-time visibility into performance metrics and project status to all members and executive sponsors
- Advanced workflow capabilities, including support for nested processes, process referencing, conditional branching, voting, synchronization, timers, iterative loops, and response-based routing
- Common virtual workspaces for both internal cross-functional team members and external constituents (suppliers, partners, customers)

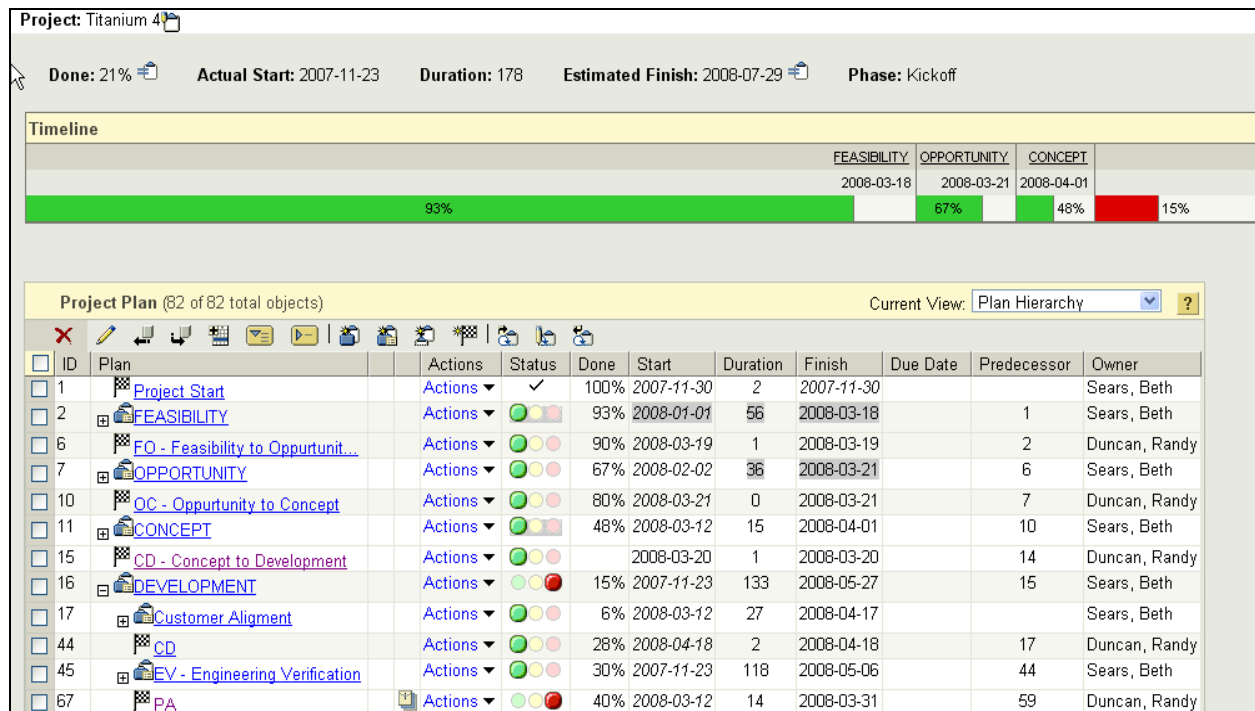
- Online collaborative design review and phase gate review meetings

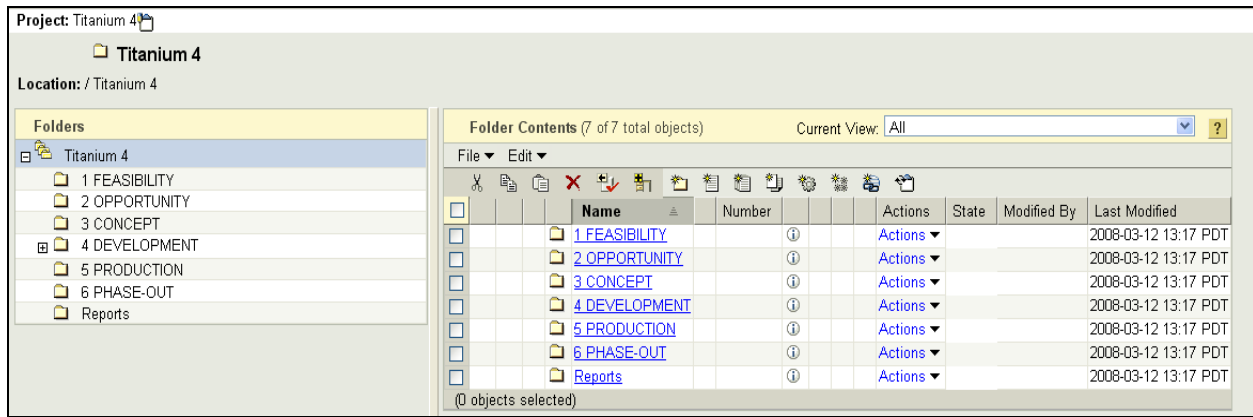
## The Phase Gate Approach

One approach to New Product Introduction involves creation of Phases and Gates to standardize product development. The phases signify a collection of activities which are followed by a gate review that ensures that the pre-defined success criteria for the phase are achieved before moving onto the next phase. “Go” or “No-Go” checks are often conducted between critical phases. Here is a sample of a Phase Gate product development approach –



ProjectLink enables companies to effectively implement these phases and gates. A standard set of activities for each phase can be created in the project plan within ProjectLink. Milestones and associated Deliverables can also be tracked in this plan. All the data associated with these activities and milestones can be stored and managed within the project folder structure that ProjectLink provides. Screen shots of the project plan and folder structure are shown below.

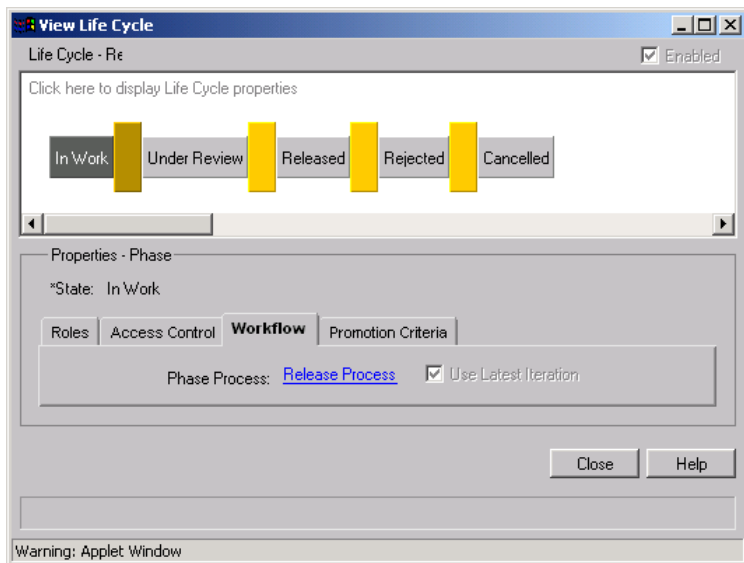
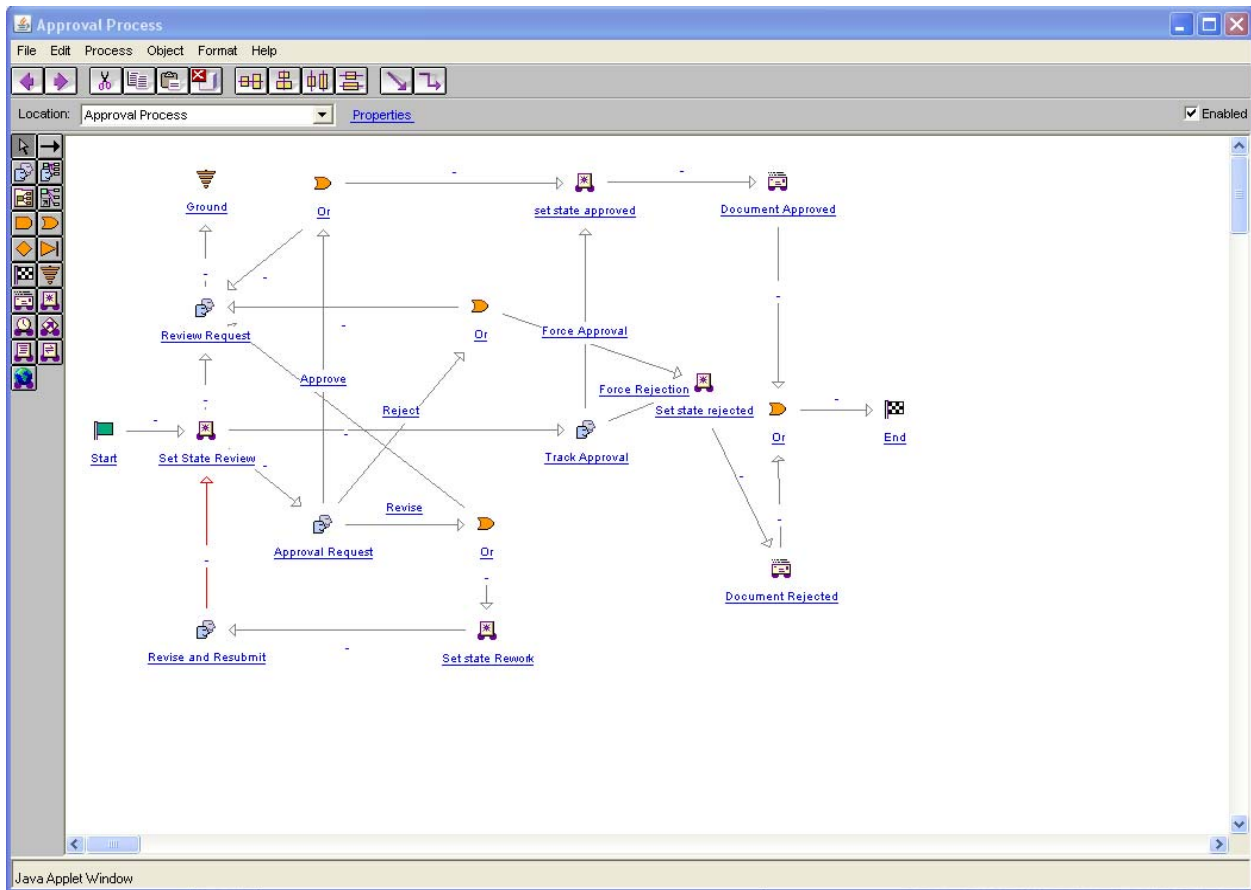




## Using Workflows to Automate Business Processes

ProjectLink provides a powerful and robust workflow engine that enables companies to automate their repetitive business processes. This results in large productivity leaps and improvements in product quality. The Windchill workflow engine, which is based on the Workflow Management Coalition reference model, provides an easy to use graphical interface to define workflows. Business owners can also define custom lifecycles for their business objects and link them to the workflows. Business processes that are common to the enterprise can be created and stored as reference blocks that can then be reused with great ease.

Processes such as change management and document approval can thus be easily automated and ProjectLink will deliver the tasks based on workflow definition to the appropriate task owners. The Workflow Monitor integrated in Windchill allows users to track the progress of a process execution. Screenshots of a typical approval workflow and associated lifecycle are shown below.



## Using Templates for Consistency

Windchill ProjectLink provides the Template feature that allows customers to capture their best practices and processes in a template and reuse it across the enterprise. When creating a new project, business owners can select a custom NPI template to leverage these existing best practices. The NPI template can automatically create a standard folder structure and standard

document templates within this structure. Project plans and Team roles are also automatically populated. The extensible nature of ProjectLink ensures that customers are able to modify these if their business rules so demand. More details on how to create and reuse these templates in projects are captured in the “Tips of the week” section below.

For more details on Windchill ProjectLink, please visit [www.ptc.com](http://www.ptc.com) or contact your PTC Account Manager.

[Back To Top](#)

## **Tips of the Month**

### **Comparing Parts, Assemblies and Drawings in Pro/ENGINEER**

[Click Here To View](#)

[Back To Top](#)

## **Tips of the Month**

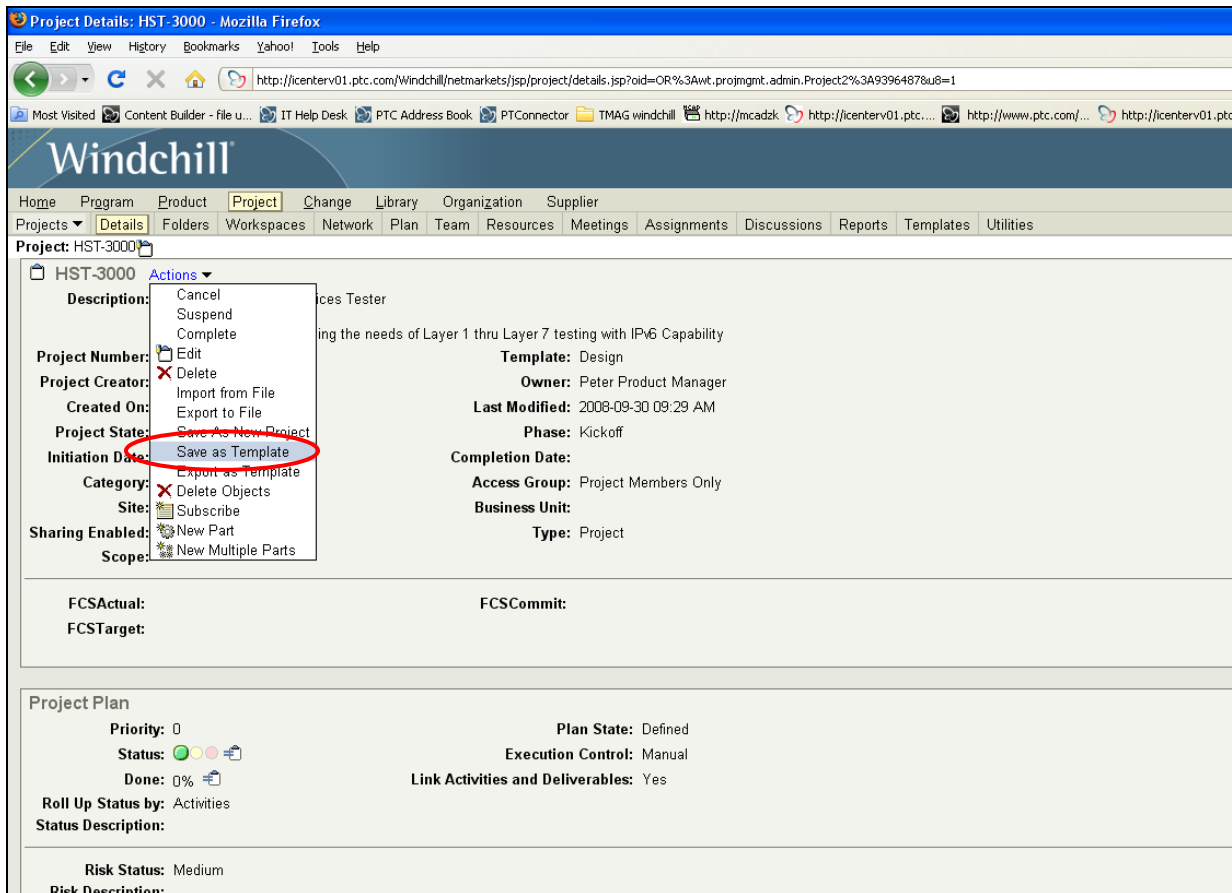
### **Creating and Reusing NPI Templates**

Project managers responsible for new products can create their own project templates in ProjectLink. Business rules that are critical to the success of the product can be easily incorporated into these project templates. These templates can then be used to create subsequent NPI projects and thus help enforce consistency across the board.

Here is how you can create your own custom templates.

## Step 1 –

As a project manager, you can create a project in ProjectLink and populate it with data that is pertinent to your organization. You can store standard document templates in the project folders section, create a team with standard roles that need to be staffed, publish a project plan with key deliverables and milestones populated amongst many other things. Standard approval workflows and other relevant automation can also be added. Then, simply select the “Save as Template” option from the “Actions” drop down on the “Details” sub-tab. A screen shot is shown below.

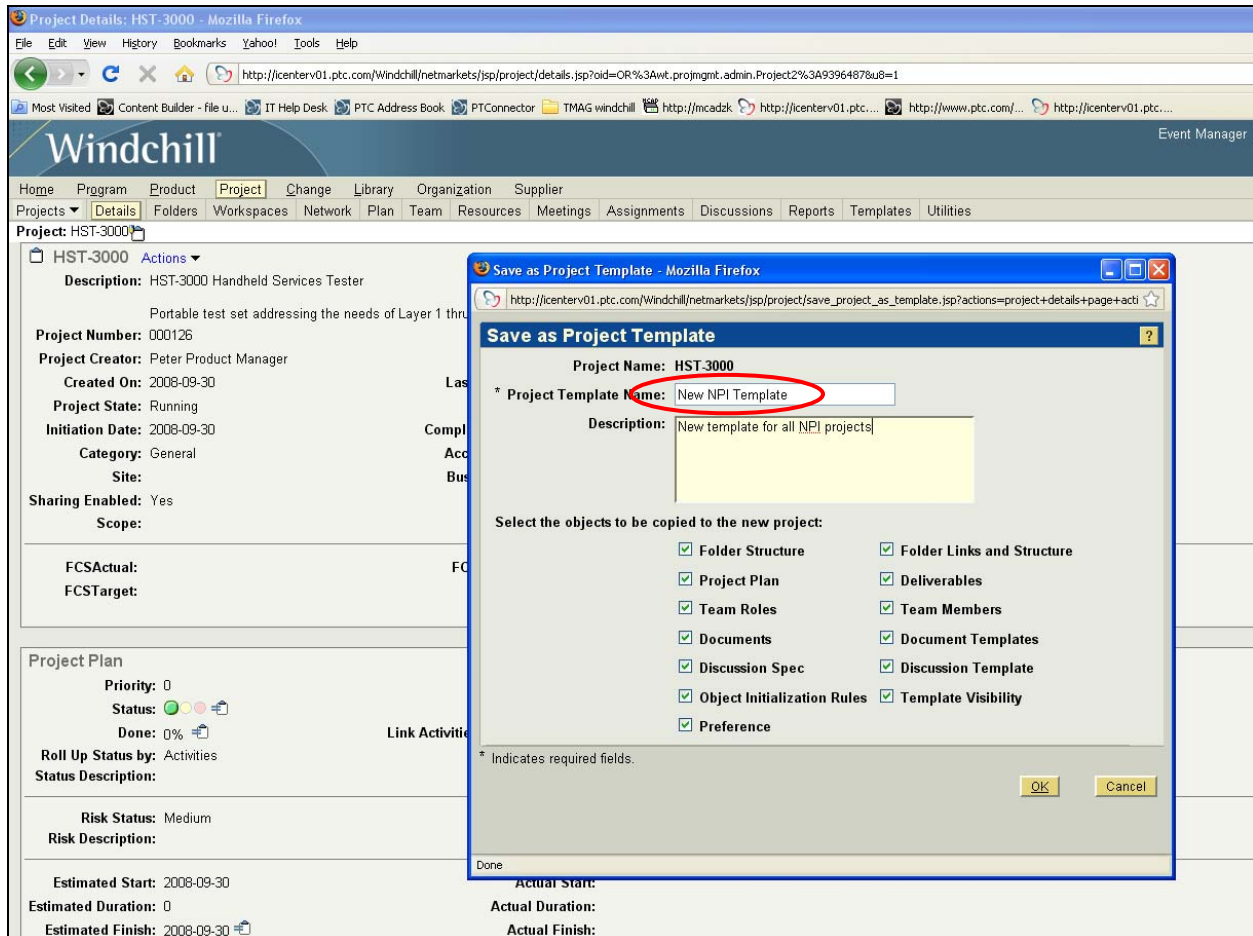


The screenshot shows the Windchill Project Details page for project HST-3000. The browser is Mozilla Firefox. The page has a navigation bar with tabs for Home, Program, Product, Project, Change, Library, Organization, and Supplier. Below this is a sub-tab bar with options like Projects, Details, Folders, Workspaces, Network, Plan, Team, Resources, Meetings, Assignments, Discussions, Reports, Templates, and Utilities. The main content area is titled 'Project: HST-3000' and contains a list of project attributes. An 'Actions' dropdown menu is open over the 'Project State' field, with the 'Save as Template' option highlighted by a red circle. Other options in the menu include Cancel, Suspend, Complete, Edit, Delete, Import from File, Export to File, Save As New Project, Export as Template, Delete Objects, Subscribe, New Part, and New Multiple Parts. The project details include: Description, Project Number, Project Creator, Created On, Project State, Initiation Date, Category, Site, Sharing Enabled, Scope, Template, Owner, Last Modified, Phase, Completion Date, Access Group, Business Unit, and Type. Below the main details are sections for FCSTarget, Project Plan (with Priority, Status, Done, Roll Up Status by, and Status Description), and Risk Status (Medium).



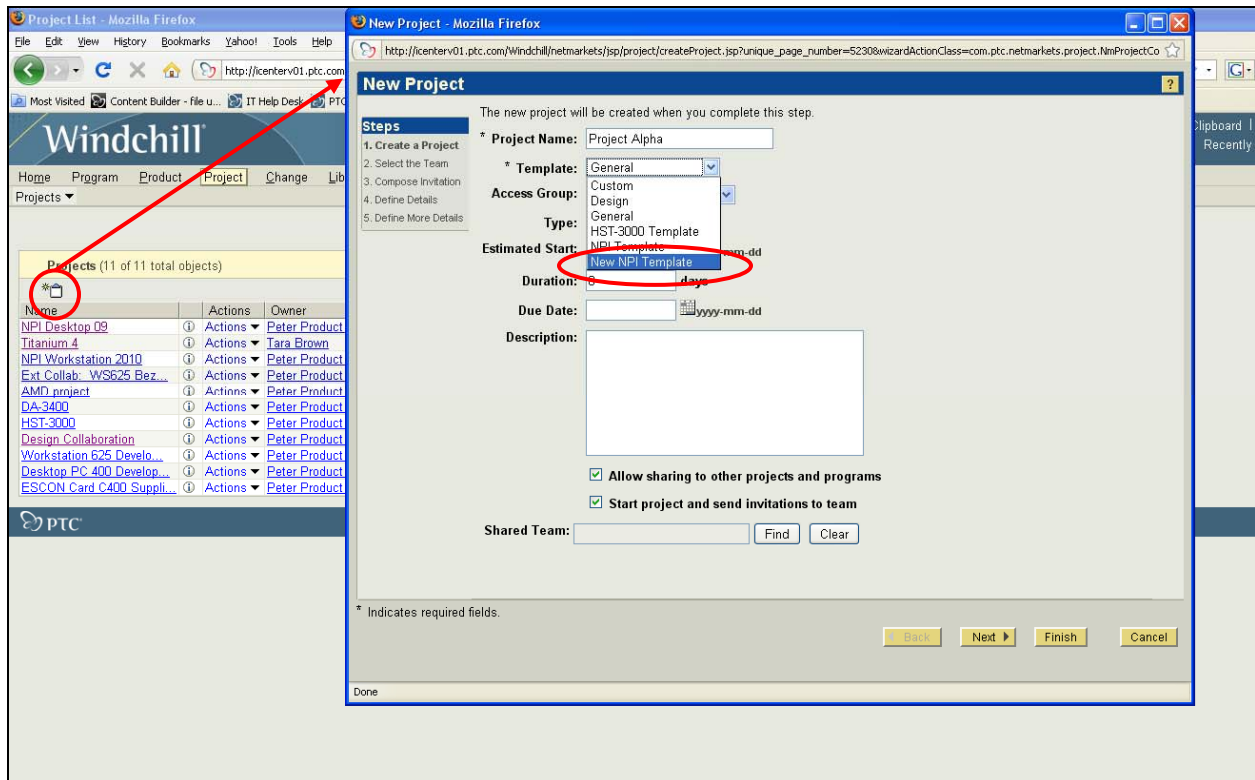
## Step 2 –

This will launch a window to save your project template. Here, you can give the template a name “New NPI template”, provide a description and select aspects of your project that you wish to \*templatize\*. So for example, if you wish to exclude the project plan from the template, simply uncheck it. Once you have made the appropriate selection, hit “Ok”. This will save the template within ProjectLink for future use. A screen shot of this window is shown below.



### Step 3 –

Now, when anyone in your organization creates a new project, the template that you just created will be available in the template drop-down menu for them to use. By simply selecting this template, the project that's being created will imbibe all the business rules embedded in the template. A project plan with deliverables and milestones will be automatically created, a team with the right roles will be populated and standard document templates will be placed in the right folders. A screen shot is shown below. Using this project template functionality, your NPI project teams will no longer need to guess what the right business processes to follow are. New product introduction will become more predictable, more repeatable and hence more successful.



[Back To Top](#)

## Announcements

### Educational Resource Library

Learn things you always wanted to do - but didn't know you could.

This one stop educational resource library will help you learn more about PTC Solutions and provide you with technical materials developed by the product experts to help you become more productive.

Get tutorials, how-to videos and expert advice for:

- Pro/ENGINEER
  - Conceptual and Industrial Design
  - Detailed Design
  - Simulation/Analysis
  - Production
  - Design Collaboration
- Windchill PDMLink
- Windchill ProjectLink
- Pro/INTRALINK
- PTC Online Tools

Check out the [Educational Resource Library](#) today.

### PTC Tips & Techniques Newsletter Archives

Miss an issue! Can't find that awesome technique you read about? Fear not, you can click on the link below and go through our Customer PTC E-Newsletter archives.

[Click Here To Access](#)

It's better than finding the Ark of the Covenant!

### PTC Tips & Techniques Webcasts: Work Smarter. Not Harder.

Click below to see regularly scheduled Tips & Techniques technical Webcasts that are designed to provide you with the most popular time-saving tricks that Pro/ENGINEER users of all skill levels will find useful. Get more out of your maintenance dollars!

[Tips & Techniques: Work Smarter Not Harder!](#)

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### **E-PROFILES IS HERE!!**

We have been eagerly anticipating the debut of the new electronic version of Profiles Magazine and now it is here! This new web site will supplement the print edition of the magazine and will

provide new useful features not feasible with paper media. e-Profiles will provide you with 24x7, worldwide access to key information previously available exclusively in the print version. "Tips & Tricks," a popular feature pioneered by Pro/USER, has also moved to the web and will be expanded as the site matures.

Please take a few minutes to check out this new web site. We don't think you will be disappointed.

<http://profilesmagazine.com/>

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[Back To Top](#)

## Upcoming Events & Training Class Schedules

Upcoming, 2008/2009      Your local Pro/Engineer User Groups  
<http://www.ptcuser.org/rugs/>

June 7 – 10, 2009      Orlando, FL USA  
PTC/USER World Event  
<http://www.ptcuser.org/>

### Events

Our seminars and conferences seek to provide you with relevant information regarding product development trends in your industry as well as innovative software learning experiences. Think of them as a constructive day off where you can share experiences and swap ideas with your peers.

If you can't manage to get away, we'll bring it to you. Check back often for regularly scheduled live webcast events.

[You're Invited to Attend...](#)

Please visit the [PTC Education Services](#) website for the latest training information including course descriptions, schedules, locations, and pricing.

- Attend a course at any PTC Center and receive a **free** copy of Pro/ENGINEER Wildfire Student Edition!

<http://www.ptc.com/services/edserv/index.htm>

### Live Instructor-Lead Virtual PTC Training Courses

Virtual Classrooms provide interactive learning with a trained PTC instructor in convenient and manageable sessions that last approximately 4 hours over a series of days. It's easy to join a class right from your desk using a phone or voice-over IP technology.

Sessions are performed just like a traditional ILT (including interactive exercises where you and the instructor can work on lab exercises together) and feature some of our most popular ILT courses. These sessions cover the exact same material as the traditional ILT in-center courses. Also look for some of our most frequently requested mini-topics delivered in the same format that are only an hour - two hours in duration.

If you have any questions about these sessions or would like to see getting other courses, not on this list, on the schedule please feel free to contact me for more details. They are a great way to bring training to you without you having to worry about location or being out from work for long stretches.

You can register for these sessions just as you would for any normal ILT class either by:

1. calling order admin at <http://www.ptc.com/services/edserv/training/registra.htm> or
2. you can go to PTC University directly at <http://www.ptc.com/learning> and submit a registration request directly. All you have to do is search the catalog by typing in “virtual” in the search field and you will see a listing.

## PTC

Note: This PTC E-Newsletter will continue to be used for the following:

- 1) Inform you on events related to PTC products (user groups, conferences, training schedules, etc.)
- 2) Educate you on solutions that are available at PTC
- 3) Tips & Techniques using PTC Products

Note: These messages are compiled in the local PTC office and will be distributed via e-mail.

[Back To Top](#)