PTC Technical Specialists E-Newsletter

Date: February 1, 2008

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Model Based Definition (MBD) with Wildfire 4.0

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PTC Product Focus

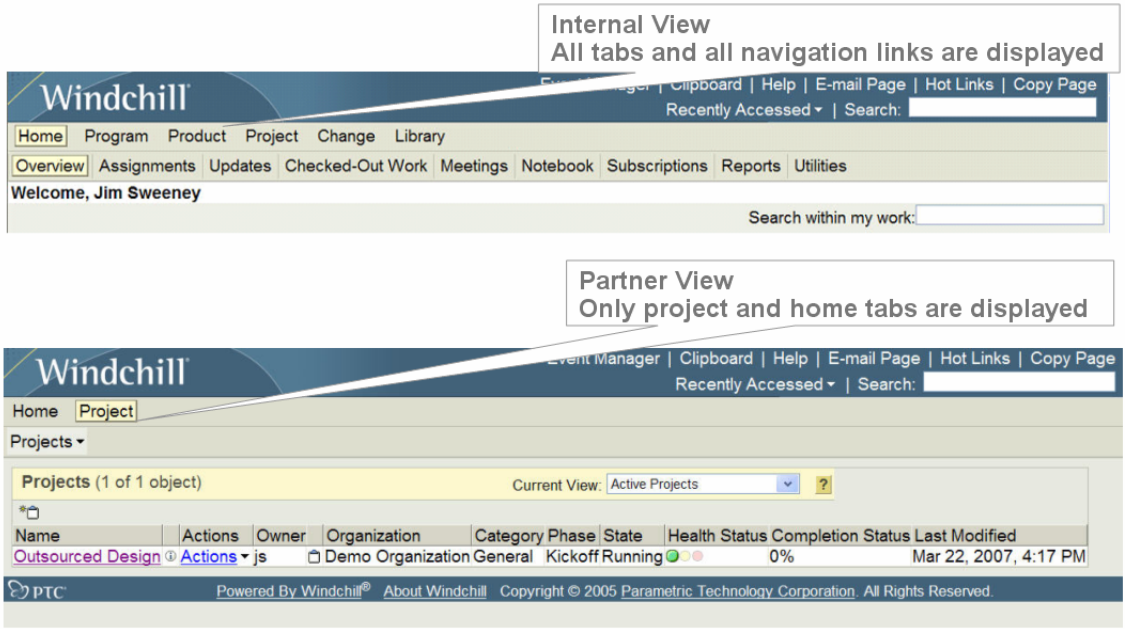
Windchill 9.0 Role Based UI Simplification – "Profiles"

Introducing Profiles

Extending the 8.0 ProjectLink ***Role Based UI*** functionality to PTC's entire Product Development System, Windchill 9.0 solutions allow administrators to further configure the user interface to fit a user's profile, tasks, and information needs. This new capability, known as ***Profiles***, allows an administrator to control visibility to Windchill information across the entire application based on a user's ID, group membership or Organization. Profile based UI controls can optionally be further refined in any individual context using the Team page action ***Configure Actions for Roles*** *(Role Based UI)*. The most typical motivation is to provide a focused set of information and actions to a supplier, partner, customer, or internal user. Such users may either be infrequent participants in a product or project, or are likely to be confused by certain actions or information.

The goal is to provide team roles with just the information and capabilities they need and no more. Limiting information and available actions can eliminate confusion, misunderstanding, errors, rework, and loss of time.

An example use of Profiles is shown below. The default UI view for Internal Users shows all top level tabs whereas the UI for external suppliers has been greatly simplified



Technical Details

You can dynamically control which actions are visible to a user, group of users, or users in an organization by associating that information with a profile**. Profiles are not an access control mechanism; they are a user interface control mechanism.** A user could have permission to edit an object based on an object domain-based policy, but not have visibility to that edit action for the object because this action is not included in the user's profile. A profile represents a typical category of user within a company and is based on the roles and privileges associated with that particular user category.

If a user does not have rights to an object or an action through access control rules, a profile will not add visibility to actions or information that are restricted by underlying access control policies. That is, you cannot grant a user visibility through a profile to an action or an area of the user interface for which that user does not already have access control rights. For example, a user could have access control permissions to the Create Part action in the system, but through a profile, that action can be hidden from the user and not visible in the user interface. On the other hand, if the user does not have access control permissions to the Create Part action, that action cannot be made visible to the user via a profile. It is the combination of a user being granted permission to an object or action via access control policies, and the profile granting visibility to those actions and objects, that will enable a user to see and perform an action. When a profile is associated or disassociated from a user or group, no change in access permissions is implied or enforced. The one exception is the "***Modify Team***" action which is discussed in the Tips section of this newsletter.

Defining/Editing Profiles

Profiles are created from the either the **Site / Profiles** or **Organization / Profiles** depending on the desired scope or permission of the administrative users.

Note that a Profile defined at the Site level can only be changed by a Site Admin. The Context column of information in the image above highlights ownership for a given Profile. The out of the box example profiles are loaded at the Site level and do not include any members.

Consistent with other areas of Windchill, Administrative actions such as export, import and enable/disable support defining and testing Profiles in a test environment and easily moving them to your production system. An Organization administrator would not have change permission on a Site level Profile and thus might perform a Save As action to create a new Profile, tailor it for his/her needs and enable it for use. For a complete description of the Profiles table and Actions, use the ? (help) icon in the upper right corner of the UI table.

Out-of-the-Box Profiles

The following table provides a high-level overview of the profiles provided out-of-the-box.

Profile	Program	Project	Product	Change	Library	Supplier	Description
CAD Author	x	x	x	x	x		**Displays**: Includes visibility to CAD data management functionality.
Consumer	x	x	x	x	x		**Hides**: All authoring functionality
Customer		x					**Displays**: Only the folders subtab. **Hides**: discussions, routings and search, including CAD data management functionality
Employee	x	x	x	x	x		**Hides**: CAD data management functionality
Non-Employee		x					**Hides**: All search (Global, Home Page & Project), as well as all authoring functionality
PDM			x	x	x		**Hides**: Project/Programs tabs as well as CAD Data Management functionality
Procurement	x	x	x	x	x	x	**Hides**: CAD data management functionality
Project		x					**Hides**: CAD data management functionality
Supplier		x					**Displays**: Only the Folder, Team and Discussions subtabs.

Notes:

- Product, Change and Library Tabs: appear when PDMLink or ArborText Content Manager Solutions are installed.
- Program and Project Tabs: only appear when ProjectLink solution is installed.
- Supplier Tab: only appears when the Supplier Management Solution is installed
- Organization and Site Tabs: appear based on inclusion in the related administrative groups.
- The CAD data management functionality referred to in the out-of-the-box profiles is controlled by the action, **View Related CAD Documents** in the set action visibility list

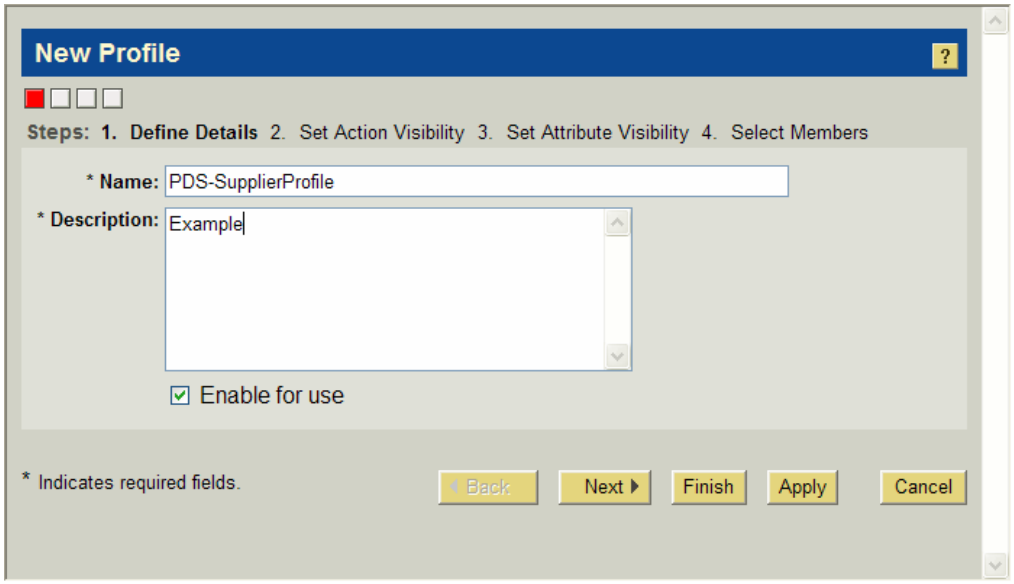
Creating a Profile

This example shows creation of a Profile that is similar to the out of the box Supplier Profile.

To create a new Profile, select the  icon on the Profile table.

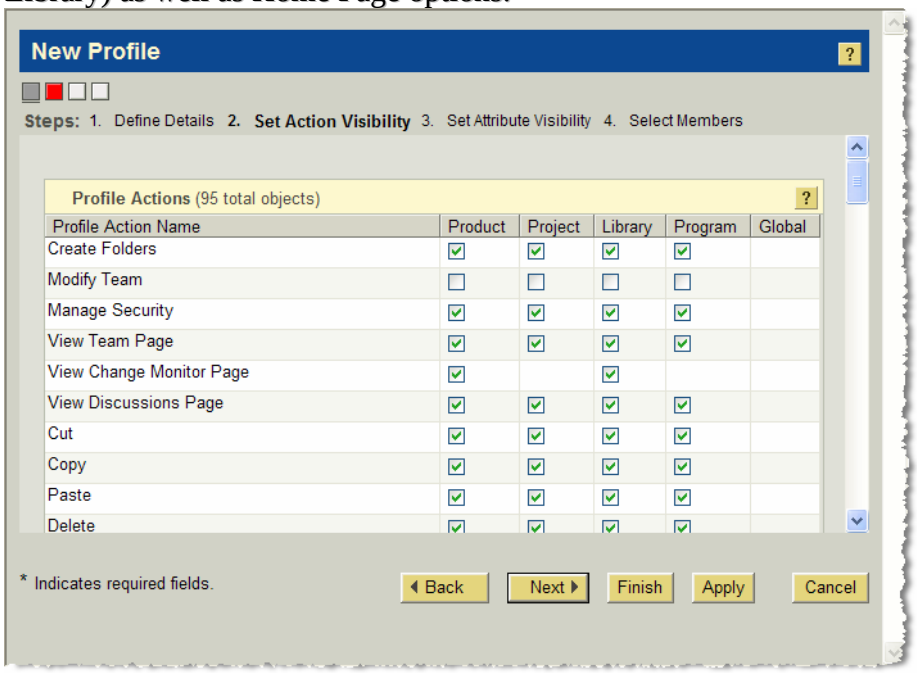
1. **Define Details**

Provide a ***Name*** and ***Description*** and decide if you want to ***enable*** the Profile for immediate use. Use the ***NEXT*** button to progress through each step in the creation wizard.

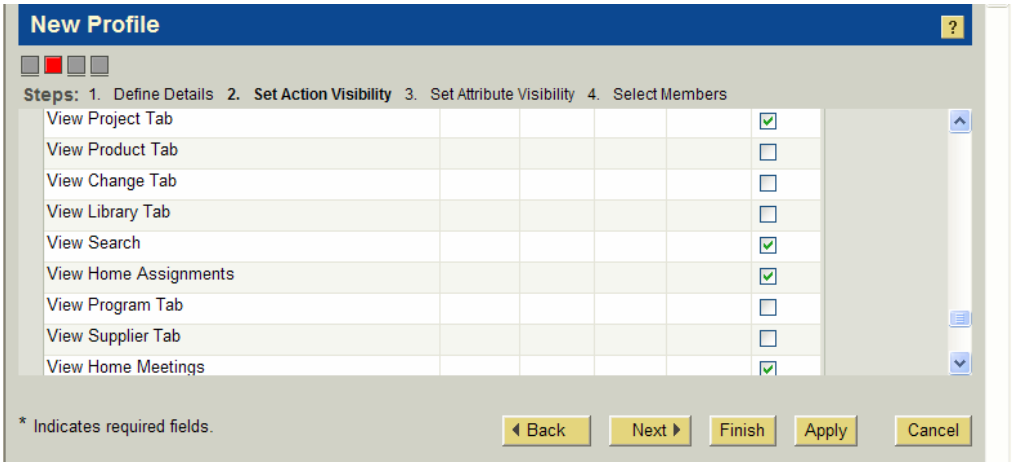


2. **<u>Set Action Visibility</u>**

Select the Information and Actions you would like to Show or Hide using the checkboxes. The Global column includes the options to control the top level tabs (Program, Project, Product, Change, and Library) as well as Home Page options.

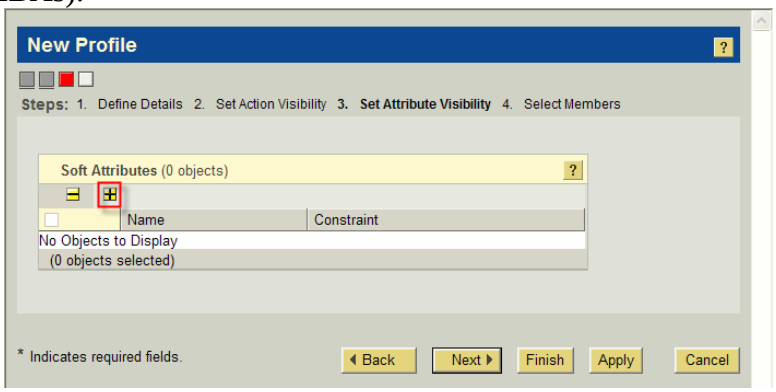


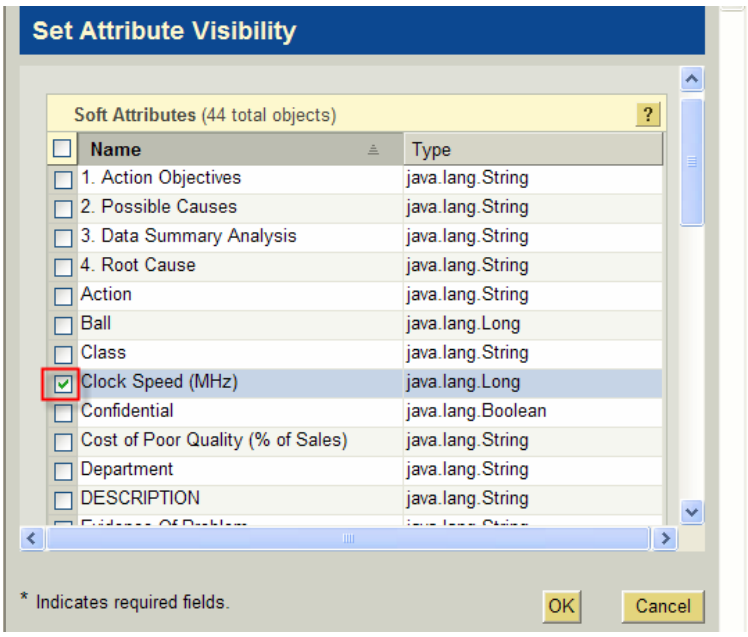
For this example, as show in the image below, remove the **Global** visibility for suppliers to see the top level Tabs **Product, Change and Library** in the UI, except for Home and Projects.



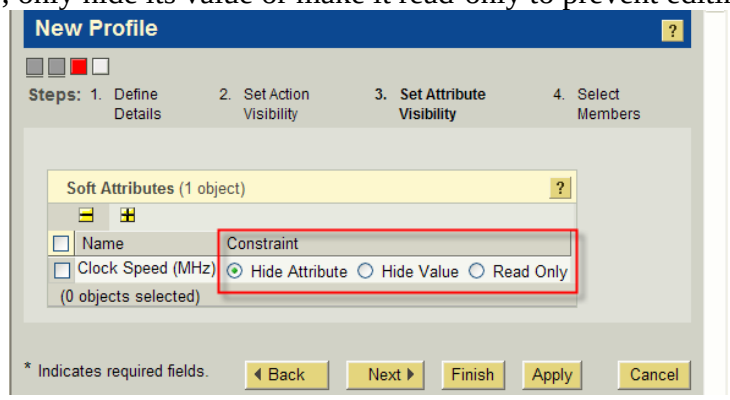
3. **Set Action Visibility**

Optionally chose to include restrictions on viewing Soft Attributes, otherwise known as Instance Based Attributes (IBAs).



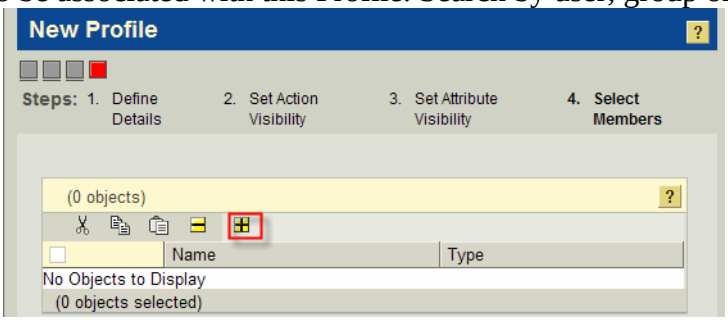


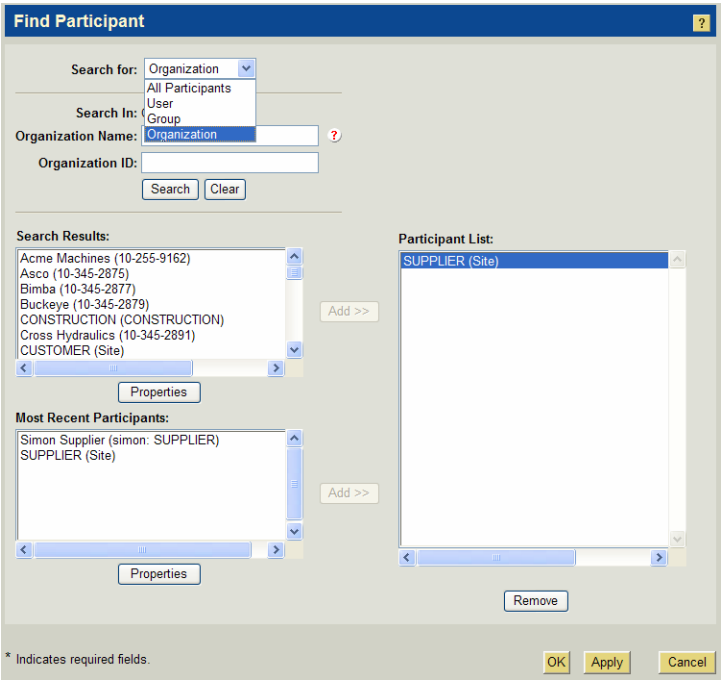
Additionally, as shown in the image below, you can establish display constraints to hide the attribute completely, only hide its value or make it read-only to prevent editing.

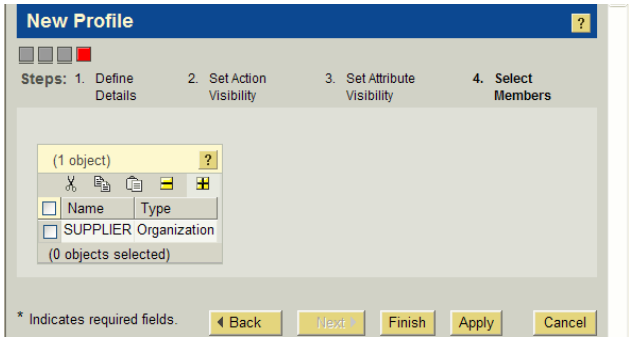


4. **<u>Set Members</u>**

Select the member to be associated with this Profile. Search by user, group or Organization.

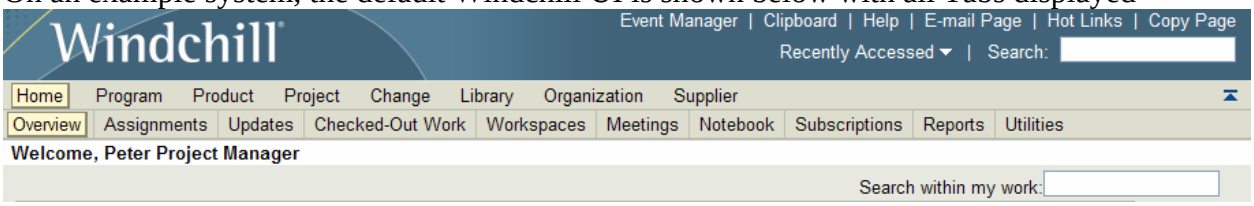




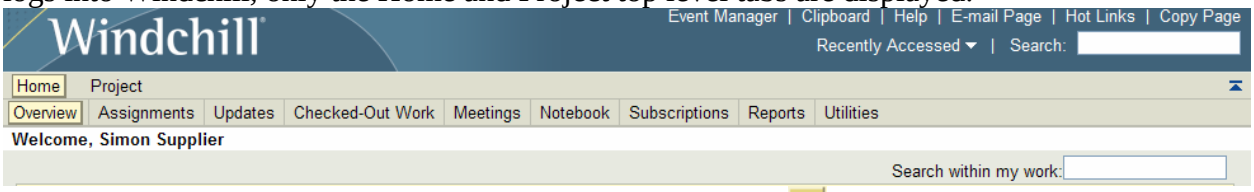


Select Finish, completing the creation of your new Profile.

On an example system, the default Windchill UI is shown below with all Tabs displayed



Based on the configuration of a Profile for Suppliers, when a user in the "Supplier" organization logs into Windchill, only the Home and Project top level tabs are displayed.



For additional details on creating Profiles see the online help ?

Default Settings for Actions

Out-of-the-box, most of the actions and user interface elements are selected by default. That is, they are by default made visible in a profile unless the administrator deselects the corresponding check box. The following items list the out-of-the-box actions that are by default deselected, unless an administrator specifically grants visibility by selecting the check boxes.

Actions Deselected by Default

- **Configure Actions for Roles**: This action allow Context Managers to override the profile for their specific context instance.
- **Modify Teams**: This action is not a specific action in the user interface. The term is used to describe the general task of changing and modifying a team which includes multiple actions in the user interface. The most frequent use case is when a Context Manager needs to allow another individual, sometimes an external partner, to be able to add but not remove additional users to the team, without making them a full Context Manager.

Default Behavior for a New User.

When a user is added to the system and the user is not associated with a profile, the user will inherit the profile that is associated with the organization of which the user or group is a member. If the organization to which the user is added is not associated with a profile, and the user is not

associated with a profile, then the user's visibility to actions and areas of the user interface will be determined by the default profile system configuration. The user will not be associated with this default system profile but the system will use this profile for the user in the absence of any other profile association.

Global Default Settings

The out-of-the-box system default profile provides visibility to all functions and areas of the user interface. This system profile may be modified by the site or system administrator to provide visibility to a minimal number of actions and information elements.

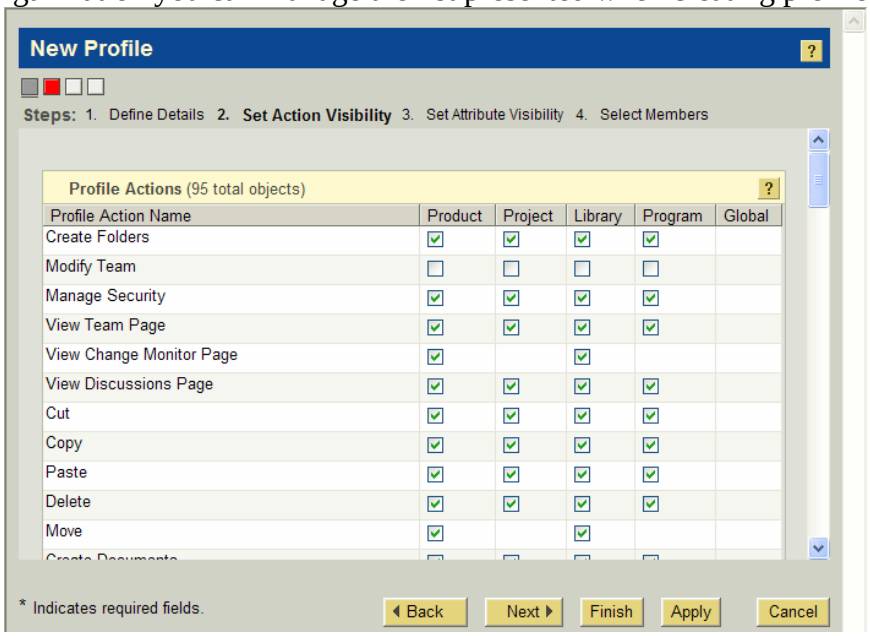
A site or system administrator can globally configure the default visibility for actions as well as the standard out-of-the-box roles. This can be accomplished by modifying the out-of-the-box system default profile, located on the server <Windchill>/codebase/ roleaccessprefs.xml.

The role-based visibility administration capability is turned on by default, that is, the wt.properties setting com.ptc.netmarkets.roleAccess.enabled is set to true. Customization can be performed while the capability is turned off, but the results will not appear in the UI until the capability is turned on. A customizer can manage both out-of-the-box UI components and customized UI components (i.e. a new custom action) with this capability.

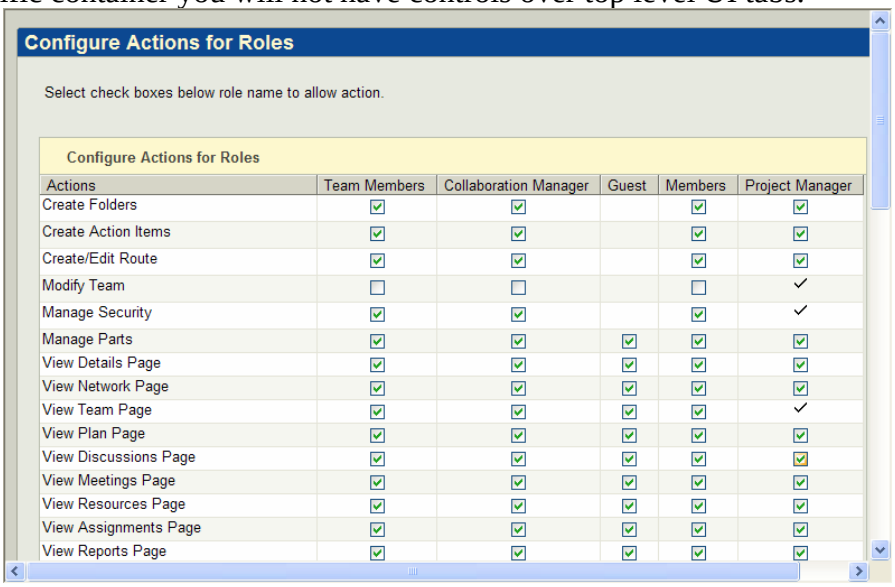
A customizer has the ability to customize the list of UI components available to administrators. You can:

- add UI components to the list,
- remove UI components from the list,
- specify default visibility settings for UI components,
- change the order that UI components appear in the list, and
- change the labels for the UI components on the list.

At the site or organization you can manage the list presented when creating profiles:



At the container level (within a Program, Project, Product or Library), you can manage the equivalent list presented when configuring visibility by roles, from the Team subtab. Within a specific container you will not have controls over top level UI tabs.



Configure Actions for Roles

Select check boxes below role name to allow action.

Configure Actions for Roles

Actions	Team Members	Collaboration Manager	Guest	Members	Project Manager
Create Folders	☑	☑		☑	☑
Create Action Items	☑	☑		☑	☑
Create/Edit Route	☑	☑		☑	☑
Modify Team	☐	☐		☐	✓
Manage Security	☑	☑		☑	✓
Manage Parts	☑	☑	☑	☑	☑
View Details Page	☑	☑	☑	☑	☑
View Network Page	☑	☑	☑	☑	☑
View Team Page	☑	☑	☑	☑	✓
View Plan Page	☑	☑	☑	☑	☑
View Discussions Page	☑	☑	☑	☑	☑
View Meetings Page	☑	☑	☑	☑	☑
View Resources Page	☑	☑	☑	☑	☑
View Assignments Page	☑	☑	☑	☑	☑
View Reports Page	☑	☑	☑	☑	☑

Review the Windchill Customizers Guide for more detailed information, before making any changes to the Site default profile.

Default Visibility for Context Managers

The site and organization administrator can choose to set defaults for and hide visibility over a specific product, library, project, program, or other application context action or user interface element. That is, the site and organization administrator can carefully control which elements that application context managers (project, program, product, and library managers) are able to override in a context instance.

Removing the ability for an application context manager to override a profile setting is done by globally hiding visibility to the Configure Actions for Roles action for a specific context. If this is done, then the visibility of actions and areas of the user interface in a context instance cannot be modified by that application context manager.

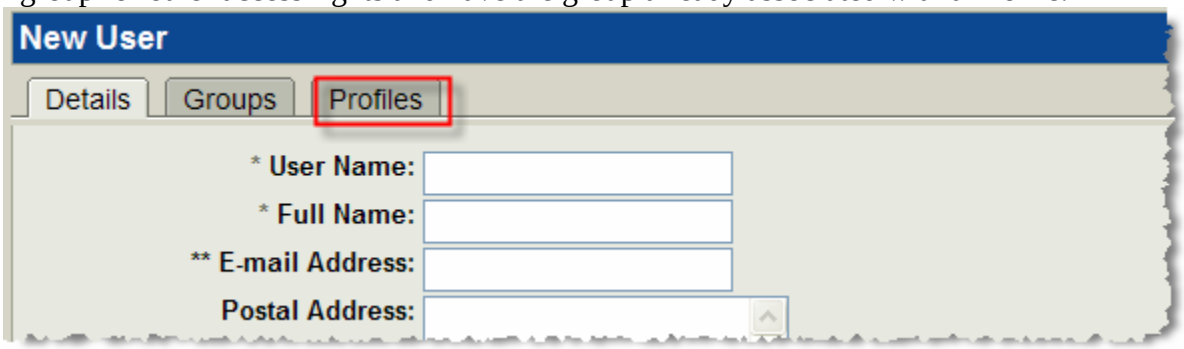
If an action or user interface element is allowed to be configured or overridden by the application context manager in a context instance, then the user interface element will be displayed as a row in the Configure Actions for Roles dialog box which is accessed from the Team page.

Additional Administrative Information

- **Number of Profiles**: Each user or group can be associated with one or more profiles
- **Display Calculation**: The least restrictive settings for visibility are assumed. For example, if a user is associated with two profiles where one profile hides an action, but the other profile allows visibility of that action, then the user will see the action in the user interface. If one profile allows read only visibility to an attribute, but another profile gives full rights to that same attribute, then the user will have full rights to the attribute.

- Profiles that are created in an organization context are peers to the profiles created in the site context, unless they are given identical names – that is, the system will merge the settings from all profiles that are associated with a user, regardless of whether they are defined at the site or the organization contexts in order to determine what will be visible to the user.
- **Unique Name**: When a profile is created in an organization context with an identical name to a profile created in the site context, the organization profile *overrides* the site profile.

- **Profile Change Realization**: Changes that are made to profiles take effect after the user subsequently logs into the system.
- **Profile Associations** Administrators can link new users directly to Profiles from the Principal Administrator. It would probably be more common to be including the user in a group for other access rights and have the group already associated with a Profile.



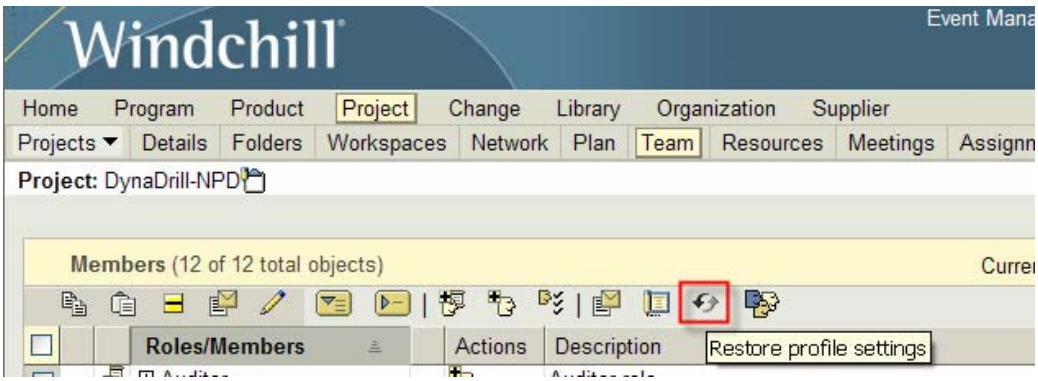
- **Restoring the use of the Profile** The use of the "**configure actions for roles**" icon disables the use of the profile settings for any members who have profiles and are members of the roles in the context. The profile settings affected are those that relate directly to the application context. For example, assume the following:

  - User Chris Taylor has a profile assigned that hides the Create Folders action in all application contexts and hides the global View Search action.

  - Chris Taylor is a member of the Designer role in a product context in which the Create Folders action is not hidden through the use of the configure actions for roles icon for the Designer role.

  Then Chris Taylor is able to see the create folders action when in this product context, but not in any other application context. The user profile remains in effect for the other application contexts in which Chris Taylor is a member and for all global actions. Therefore, Chris Taylor cannot see the Search link.

  To restore the use of profiles in an application context, click the restore profile settings icon. This icon is available from the **Members** table on the application context **Team** page. Clicking this icon removes any configuration done through the configure actions for roles icon for the members in all context team roles.



References

- Online Release Notes (LINK)
- Reference Documentation (Link)
  - 9.0 Business Administrator's Guide– Creating & Managing Profile Chapter
  - 9.0 Customizer's Guide – Action Visibility Chapter
- Online Help for Profile Management, accessed from a running Windchill system

Availability

- Profile functionality is available in the following 9.0 solutions: Windchill PDMLink, Windchill ProjectLink and Arbortext Content Manager

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Tips of the Month

Options for Manipulating Dimension Witness Lines in MBD Models

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Tips of the Month

Windchill – Team Management Tips

An occasional misconception amongst Project Managers is that if they would like to permit another individual to add team member they need to add them to the Project Manager role, thus extending more permissions than they would like. A common use case is one in which collaboration is occurring with an external partner that frequently needs to add members from his/her company to the project team. Often the Project Manager is reluctant to do so because they know that the Project Manager role is "king" and has administrative control across all areas of the Project. They may have resorted to asking the external partner to email them with a list of people to add to the team. The good news is that another option exists!

Using the **Role Based UI** functionality introduced in ProjectLink 8.0 M20, a Project Manager can grant the limited ability to invite new team members. Normally when users think of the Role Based UI they only consider removing or hiding functionality.

User in a role granted the "***Modify Team***" action will have the following limited capabilities.

- Team actions that are **allowed**: Add Roles, Add Members.
- Team actions that are **not allowed**: Remove Member, Replace Member, Remove Role, Remove Group, Add Member to Project Manager's role

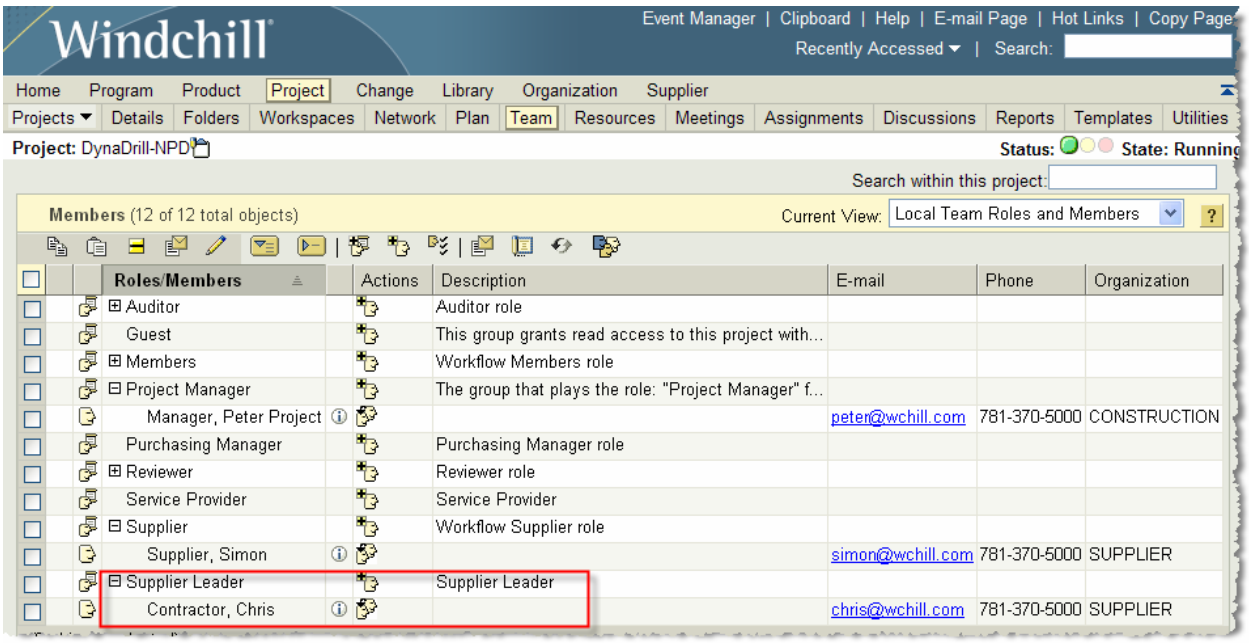
Understanding these restrictions should give the Project Managers confidence that their project will not be accidentally disrupted.

Example – Extending "Modify Team" permission

Follow these example steps to extend team changing permission to the leader from your partner/supplier organization.

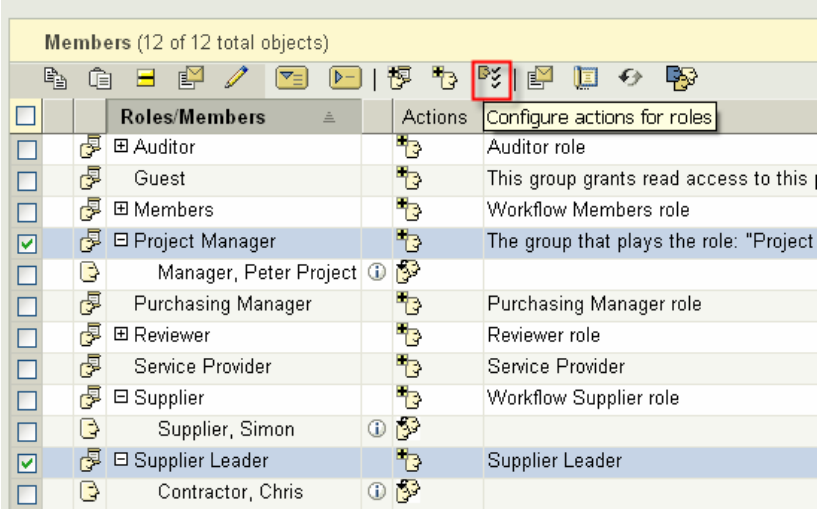
1.0 **Default Team**

Add a new role to the Team, in this example "Supplier Leader", and add your key contact from the partner/supplier organization to that role.

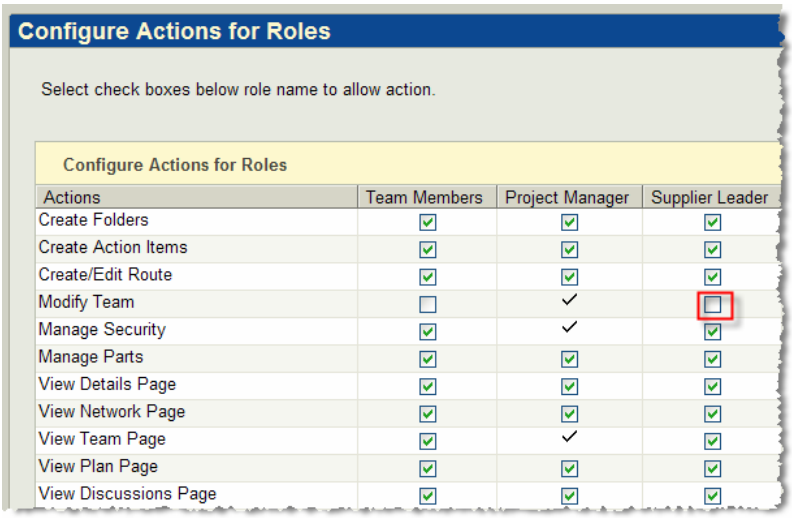


2.0 **Use the Role Based UI to extend "Modify Team"permissions**

Select the Supplier Leader role and then choose the "Configure action for roles" icon, as show below. You can optionally include other roles at the same time. Select no roles and choosing "Configure actions for roles" will open the pop-up UI and include all roles.

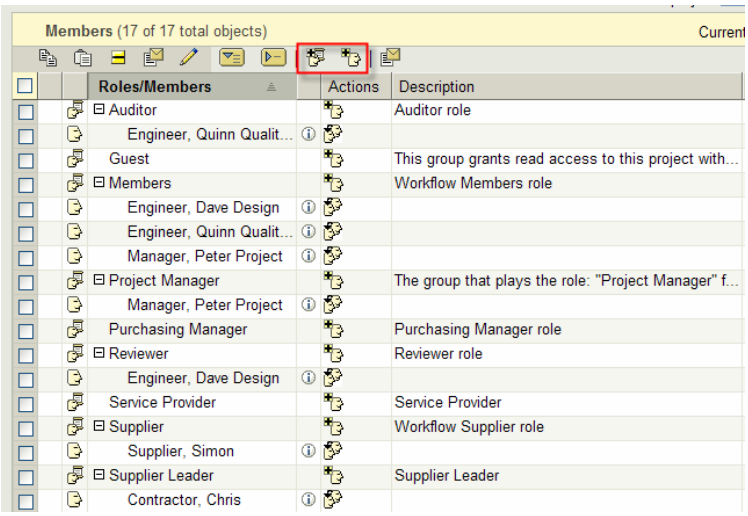


In the pop-up UI, select the Modify Team checkbox for the Supplier Leader role, and choose OK in the bottom right corner to confirm the change.

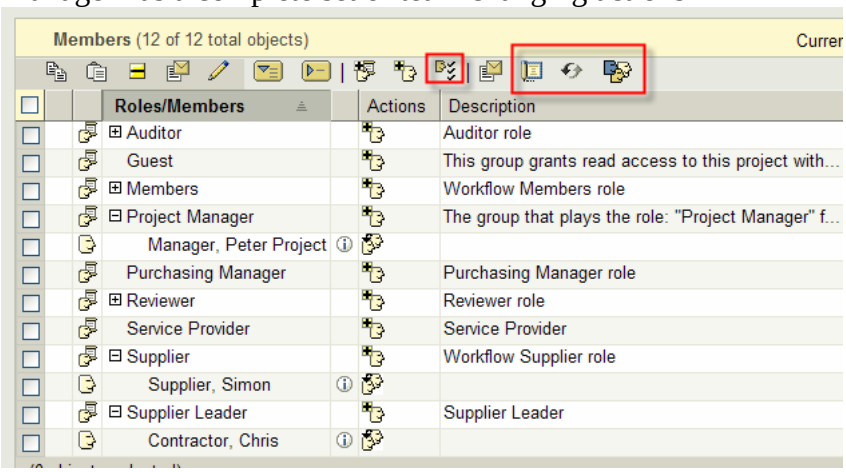


3.0 **Reviewing the Results**

Chris the contractor, in the Lead Supplier role now sees the UI below on the Team Page, where he/she can now add roles and users.

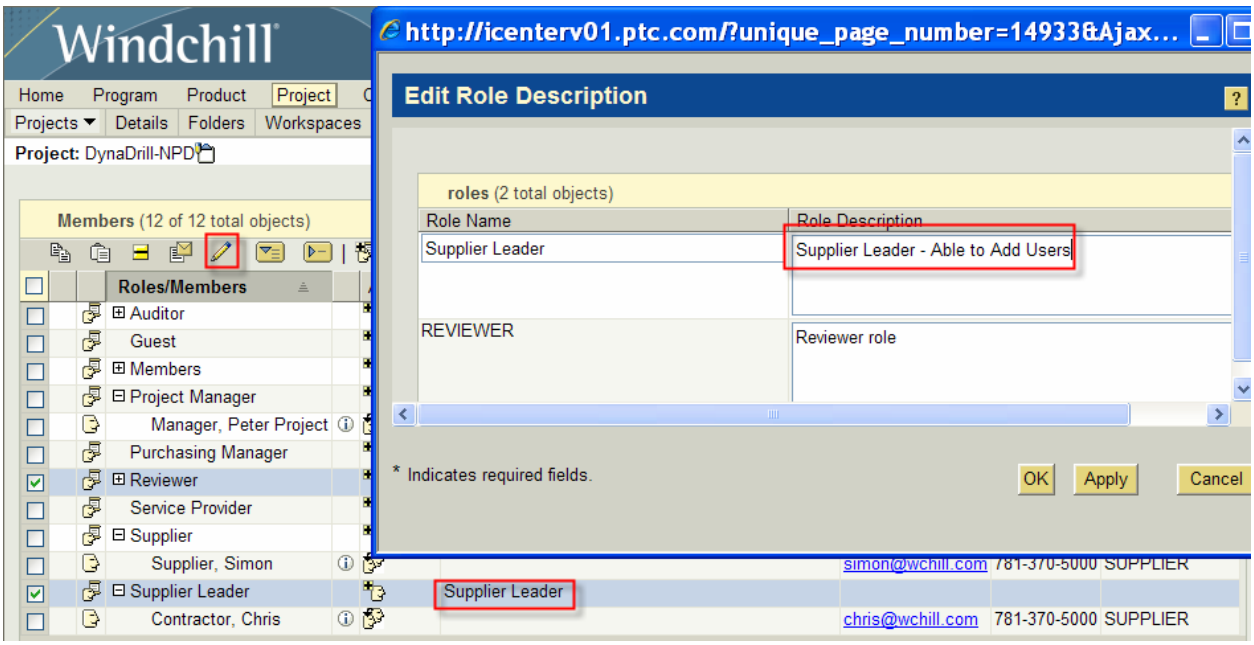


The full project manager has a complete set of team changing actions

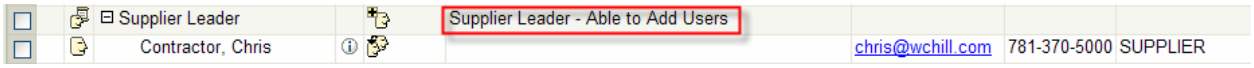


One Last Tip

New in 9.0 is the ability to display and edit a **description** or intent of a role. You can use the "edit" icon to alter the description of 1 or many roles at the same time. For example, you could change the **Supplier Leader's** role description as shown below, to indicate unique information about their permissions. Also note that using this method you can edit only the names of unique Roles you created manually such as "Supplier Leader". The out of the box or system standard role "Reviewer" cannot have its name changed and is rendered as read-only in the edit UI.



Now our partner Chris will be reminded that he has special capabilities and other team member will have a raised awareness.



I hope you found this last tip worthwhile.

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Announcements

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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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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.

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