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PTC Product Focus

Using Mathcad Scriptable Controls to Enhance the Calculation Process

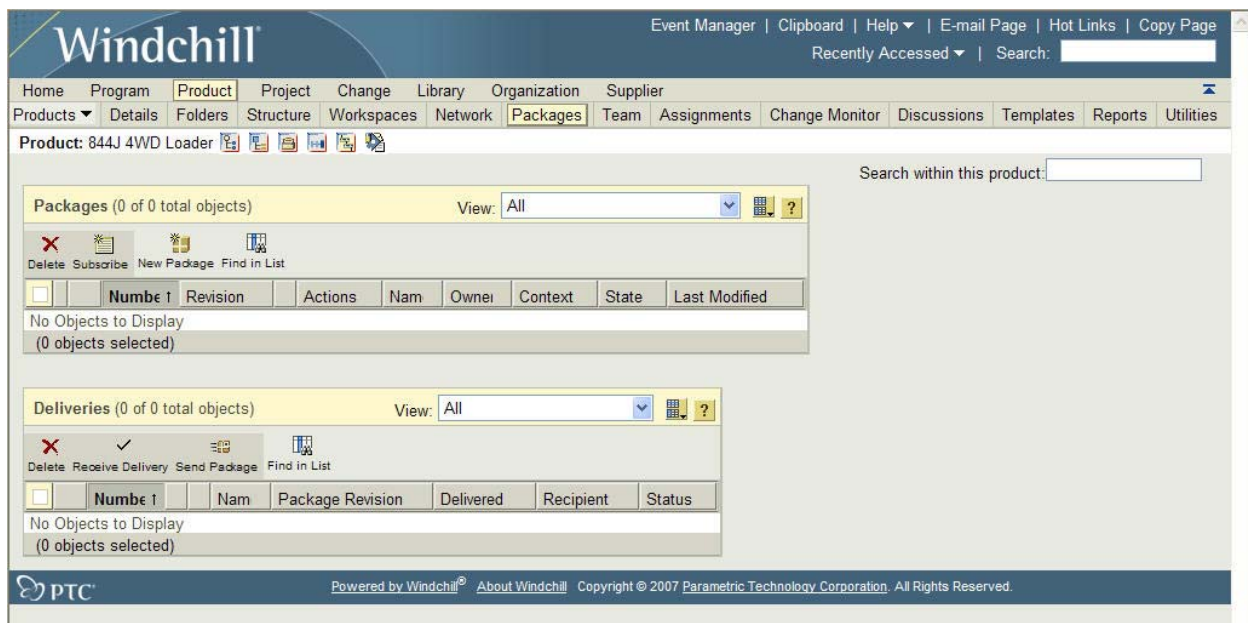
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PTC Product Focus

Windchill Work Packages

Windchill Work Packages, new in Windchill 9.1, enable users to create, deliver and track packages of Windchill managed information, allowing offline access to Windchill information for partners outside your Windchill system.

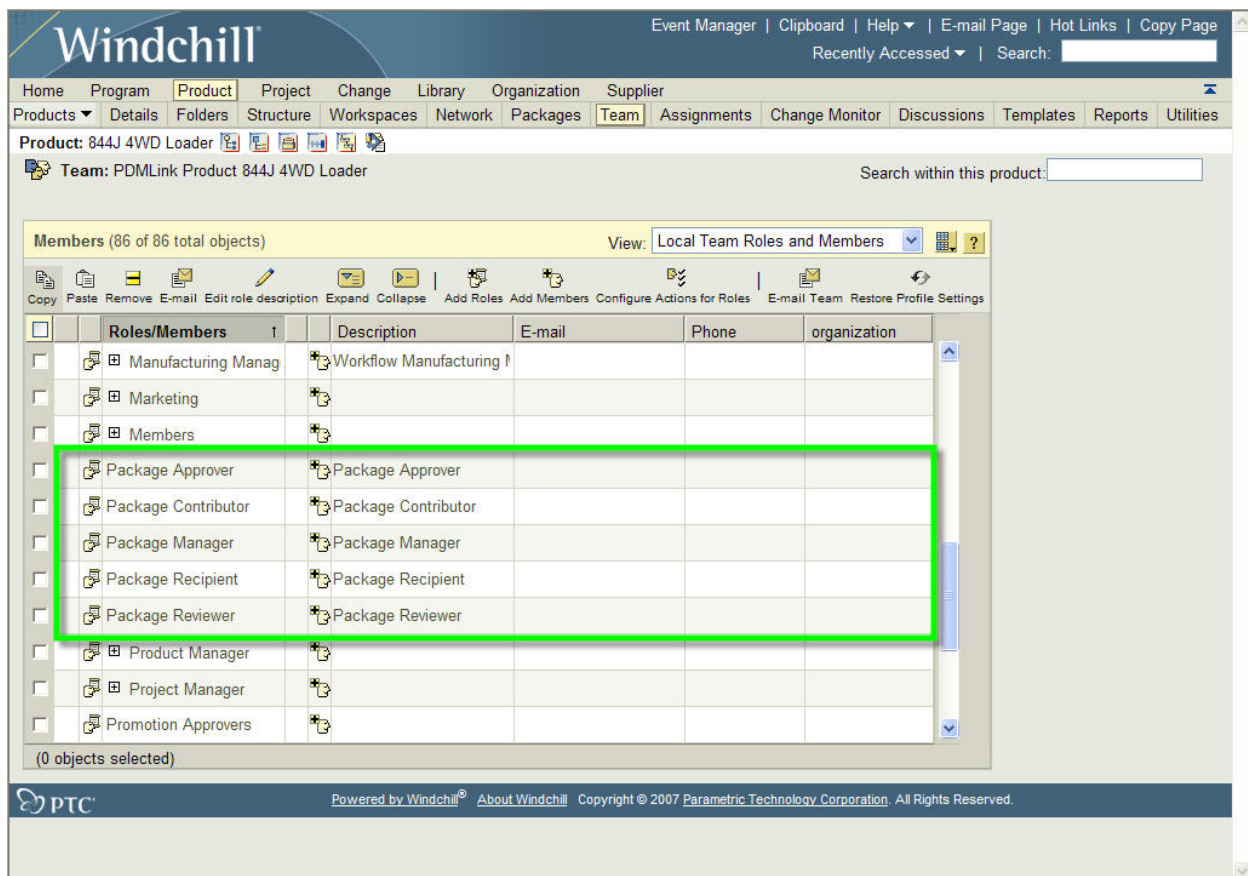


Packages are an ideal way to deliver an RFP or RFQ to suppliers, a collection of deliverables for a review, or CAD models to a manufacturer or customer. The system allows for the creation of a zip file with static offline Windchill pages with embedded help, documents, parts, product structure, CAD files, and change information and associated meta-data, which can then be sent as attachments or downloaded from a link in a Windchill generated email.

Package Team Roles

When packages are enabled for a Program, Product, Library, or Project in Windchill, the following roles are added to the team to provide a governance structure:

- **Package Manager:** A member who can create, administer, update, and revise the package. Although the package manager must create the package, any user who has access to the package can manage it.
- **Package Contributor:** A member who can add or update information in a package.
- **Package Reviewer:** A user or group who receives and reviews the package for delivery.
- **Package Approver:** A user or group who receives and approves the package for delivery.
- **Package Recipient:** A user or group who receives the package through a delivery. Package recipients can see only deliveries for which they are the direct recipients.



Package Structure

The primary items that can be added to a Package are Documents, Parts, CAD Documents, and Change Objects. Any Windchill object that can be included in a baseline can be added to a package.

Objects are added through a standard Windchill search/collector interface, and Windchill adds and excludes dependents through rules defined within the package.

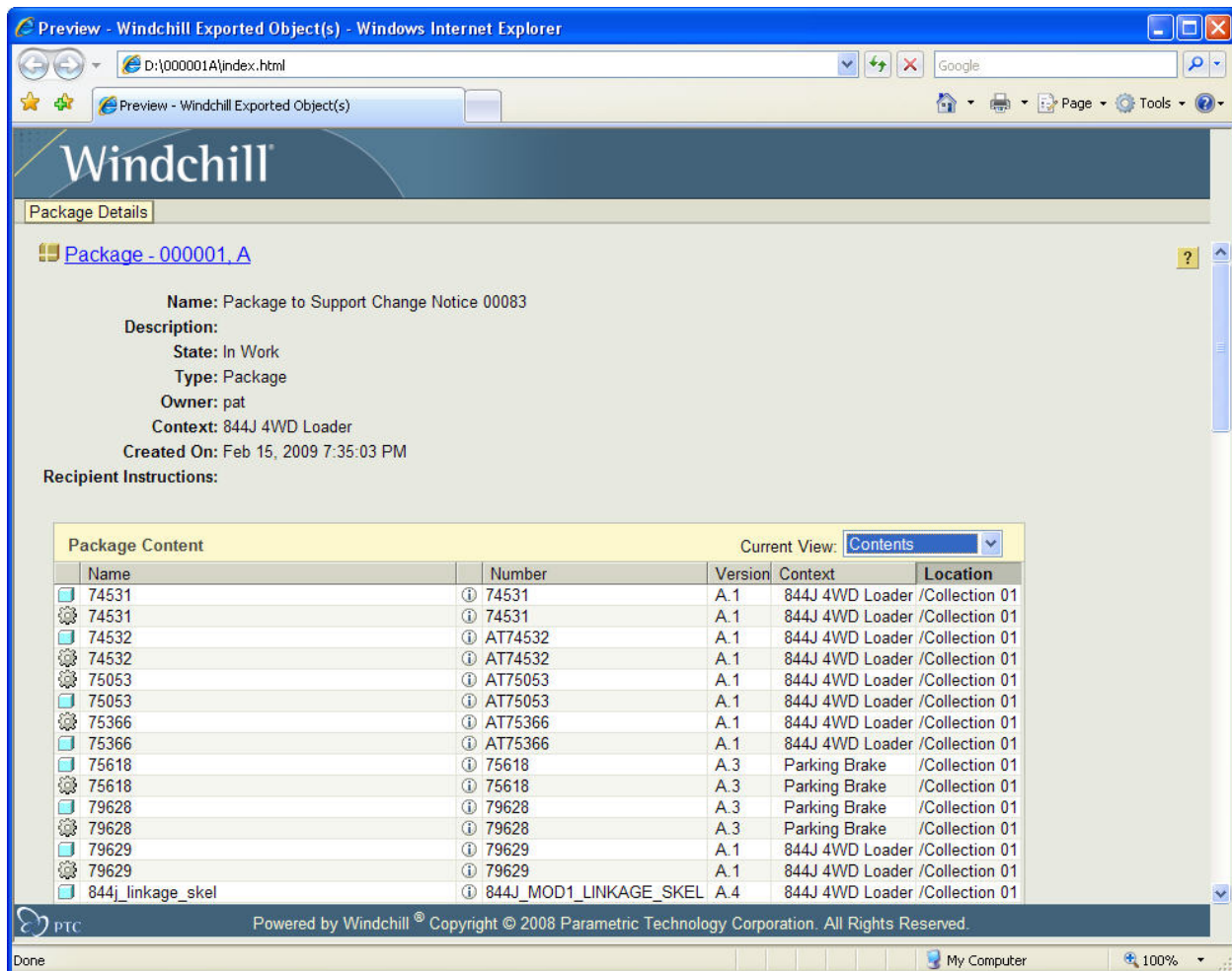
Packages can also contain folder structure and documents created within the context of the package.

Package Maintenance

Because packages can be created for data that is dynamic there are various types of maintenance that must be performed. For example, a package can be refreshed to reapply collection rules.

Before a package can be routed it must be locked. This prevents any data from being added or removed from the package and ensures that all recipients of the same package revision receive identical information. Once a package has been locked no changes can be made without creating a new revision.

After a package is locked a zip file can be created for delivery to recipients outside of Windchill. The process of zipping a package is performed as a background process whose status is displayed on the information page of the package. A picture of the static Windchill interface included in a zipped package can be seen below.



Other functionality that is available for packages include subscriptions and discussion forums.

Package Delivery

Delivery is managed from the Deliveries subtab on the package information page. A delivery is initiated by creating a Delivery Label, which defines the recipients, instructions, delivery medium, etc. Below is a representation of the information captured in a delivery:

Windchill®
Event Manager | Clipboard | Help ▾ | E-mail Page | Hot Links | Copy Page
Recently Accessed ▾ | Search:

Home Program Product Project Change Library Organization Supplier
Products ▾ Details Folders Structure Workspaces Network Packages Team Assignments Change Monitor Discussions Templates Reports

Product: 844J 4WD Loader | Package: [Package - 000001.A](#)

Actions ▾ **Delivery** - 000001 (Peter Project Manager)

Package Name: Package to Support Change Notice 00083
Package Number: 000001
State: In Work
Description:

Context: 844J 4WD Loader
Zip File: [000001A.zip](#)

Created By: [Pat Product Manager](#)
Created: 2009-02-15 18:32 EST
Last Modified: [Pat Product Manager](#) on 2009-02-15 18:32 EST
Package Delivery Status:
Delivery Status Date:
Comments:

Delivered By: pat
Delivered: 2009-02-15 18:32 EST
Received By:
Received:
Set By:

Recipient Name: Peter Project Manager
Recipient Email Address: peter@wchill.com
Shipping Address and Contact:

Sender: Pat Product Manager
Sender Email Address: pat@wchill.com
Contact Information: 140 Kendrick St
Needham, MA 02494
781-370-5000

Organization:

Subject: Package Delivery: Package to Support Change Notice 00083 - 000001 A
Recipient Instructions:
Delivery Medium: Email Link
Delivery Number: 000001
Tracking ID:

Send email notice: ✓
Planned Delivery Date: 2009-02-15 00:00 EST
Delivery Service:

Summary

In summary, Windchill packages provide a great mechanism to support collaboration with design partners through convenient exchange of a focused set of product information across a distributed development environment. They provide the capability to track exactly what was delivered, received, and accepted by suppliers and customers for full traceability of the information exchange process.

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Tips of the Month

Using Mathcad's Scriptable Text Box Control to Validate a Result

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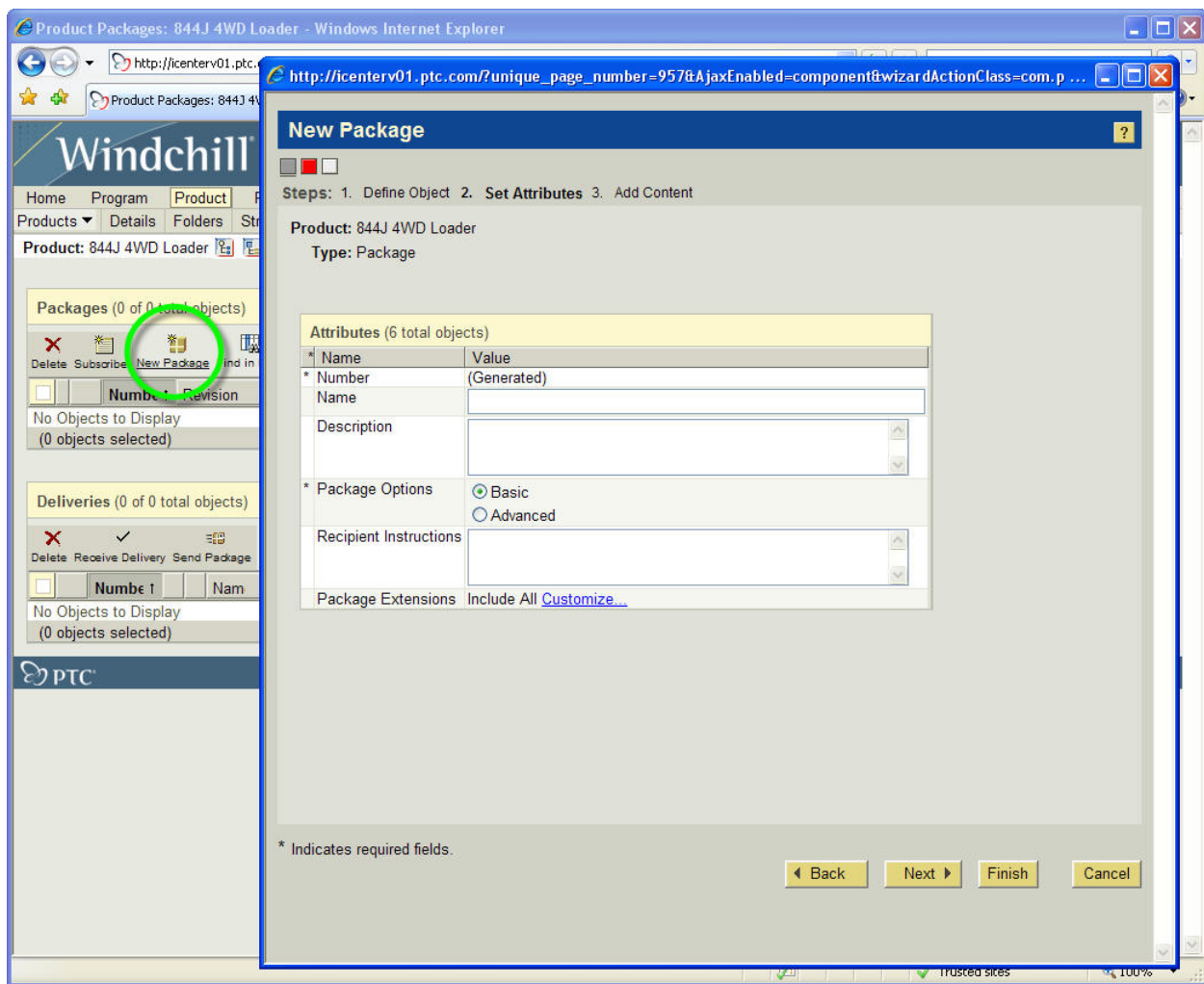
Tips of the Month

Creating a Windchill Work Package

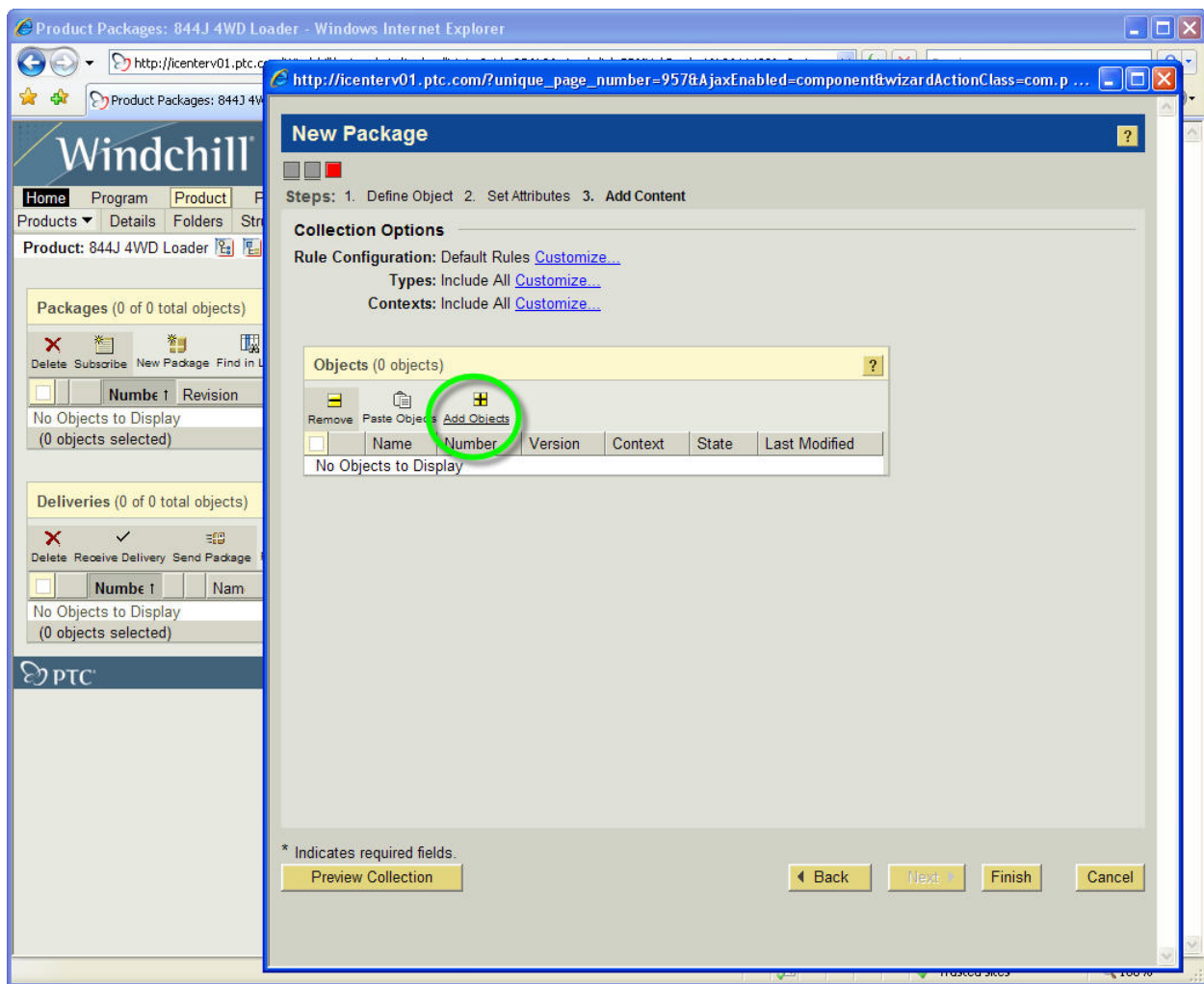
A new package can be created from two places:

- The Packages table, which appears on the Packages page for each Product, Program, Library, or Project.
- The Actions drop-down menu on the information page for each Product, Program, Library, or Project.

In the following example, we've navigated to the Packages page for a Product. This product has had packages "enabled", which is a step performed by the Product Manager and creates the roles on the Product team to support package governance. If this step has not been performed, the New Package icon will not appear in the Packages table.



We've selected the New Package icon and the New Package wizard has appeared, allowing us to define the details for this package. In our system, the package will be auto-numbered and we have the option to specify a Name, Description, Options (Basic packages contain one collection, while Advanced may contain more than one), Recipient Instructions, and we have the option to filter content with specific file extensions.



After we've defined the details to describe and control the package we are able to specify the objects to include in the package. We first define our collection options which allow us to control how dependencies are handled, types to include or exclude, and contexts to include or exclude.

Once we've defined our rules we are ready to search the system for content. We begin by selecting the "Add Objects" icon.

http://icenterv01.ptc.com/?unique_page_number=1053&AjaxEnabled=row&wizardActionClass=com.ptc.ne - Windows Internet Explorer

Add Objects to Collection

Search For:

Context:

Name:

Number:

Revision: ☒ Select: ☐ Specify:

Iteration: ☒ Select: ☐ Specify:

[Refine search](#)

Search Results (2 of 2 total objects)

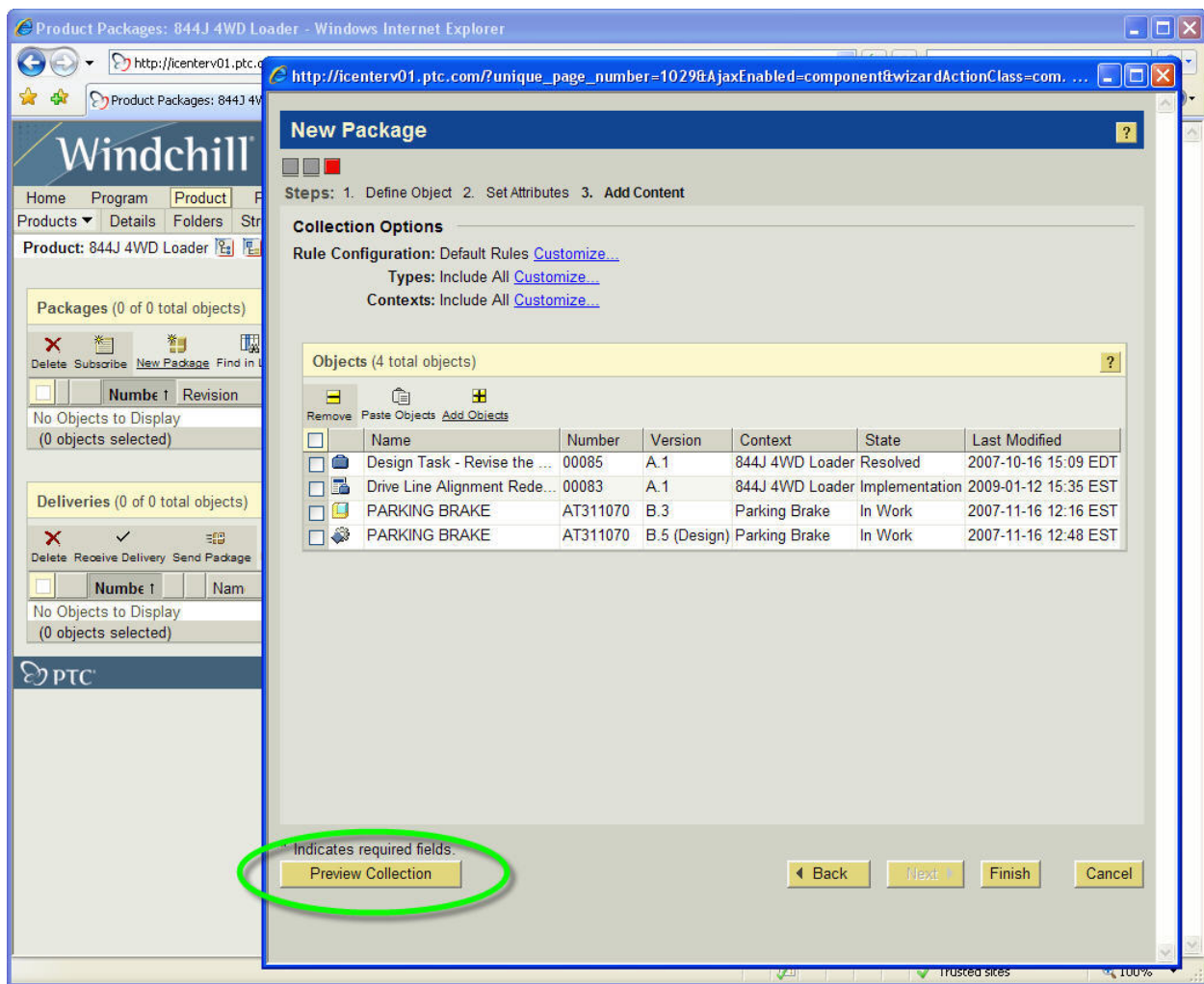
		Numbe	Name	Context	Version	State	Last Modified	Created On
<input type="checkbox"/>		00083	Update CAD Design tr ...	844J 4WD Loader	A.1	Resolved	2007-10-05 11:47 EDT	2007-10-04 16:34 EDT
<input checked="" type="checkbox"/>		00083	Drive Line Alignment F ...	844J 4WD Loader	A.1	Implementation	2009-01-12 15:35 EST	2009-01-12 14:28 EST

(1 objects selected)

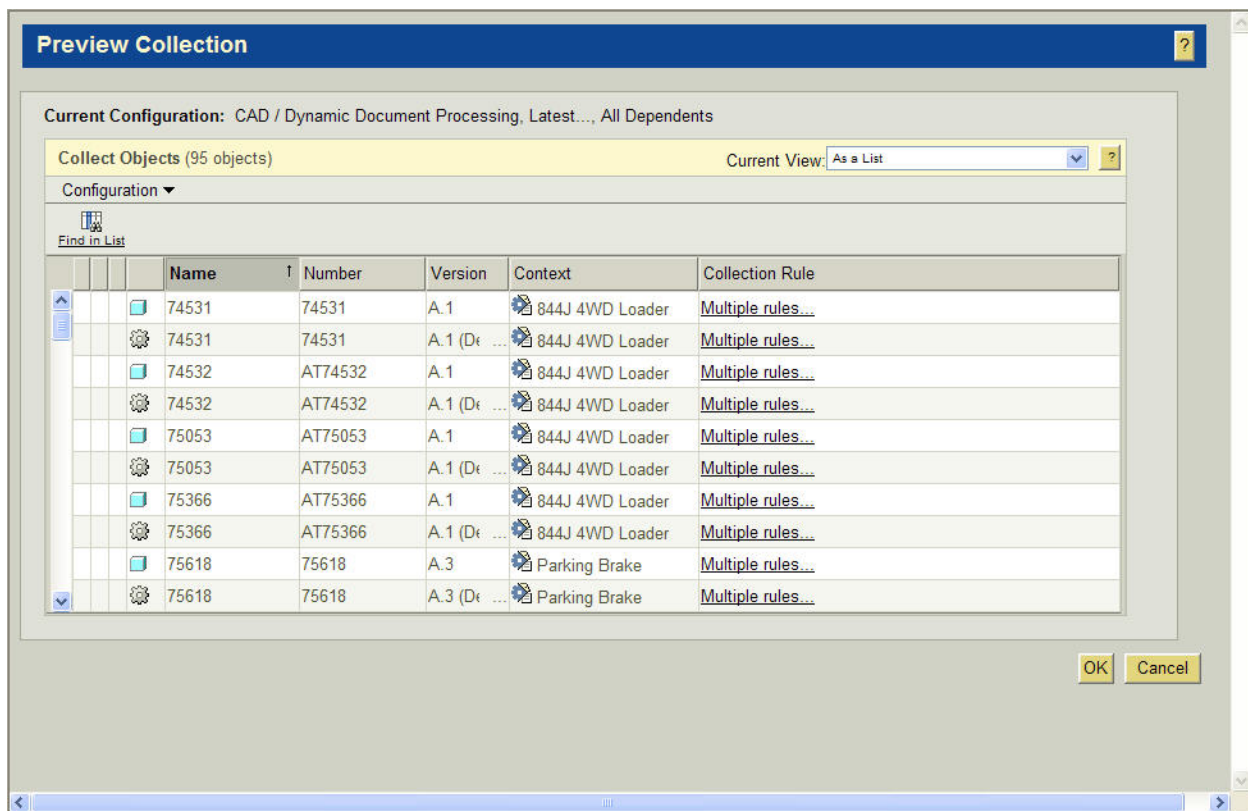
[Refine search](#)

* Indicates required fields.

We are then able to search the system to select the items to include. Here we've searched for and selected a Change Notice.



After we have added all of our selections to the list of objects to include, we can preview the list of items that will be collected according to the collection options that we have specified.



Our initial selection of 4 objects (Change Notice, Change Task, Part, and CAD Document) have resulted in 95 dependencies being included.

Windchill

Event Manager | Clipboard | Help | E-mail Page | Hot Links | Copy Page
Recently Accessed | Search:

Home Program **Product** Project Change Library Organization Supplier
Products ▾ Details Folders Structure Workspaces Network Packages Team Assignments Change Monitor Discussions Templates Reports Utilities

Product: 844J 4WD Loader

Actions ▾ **Package** - 000001, A **State:** In Work ?

Name: Package to Support Change Notice 00083
Zip File: None
State: In Work - Released - Canceled
Last Modified: [Pat Product Manager](#) on 2009-02-15 14:35 EST
Description: [More Attributes](#)

Package Content Deliveries General ▾ Related Objects ▾ History ▾ Collaboration ▾

Package Content (95 of 95 total objects) View: All ?

Paste Remove New Folder New Document New Document from Template New Link Add to Package Refresh Lock Find in List

	Name	Actions	Number	Version	Context	State	Last Modified	Collection Rule
	PARKING BRAKE	Actions ▾ AT311070		B.3	Parking Brake	In Work	2007-11-16 12:16 EST	Initially Selected
	PARKING BRAKE	Actions ▾ AT311070		B.5 (Design)	Parking Brake	In Work	2007-11-16 12:48 EST	Initially Selected
	Design Task - Rev ...	Actions ▾ 00085		A.1	844J 4WD Loader	Resolved	2007-10-16 15:09 EDT	Initially Selected
	Drive Line Alignm...	Actions ▾ 00083		A.1	844J 4WD Loader	Implementation	2009-01-12 15:35 EST	Initially Selected
	O-RING	Actions ▾ U12547		A.1	Standard Parts	Released	2006-10-04 17:34 EDT	Dependent
	O-RING	Actions ▾ T77613		A.1	Standard Parts	Released	2006-10-04 17:35 EDT	Dependent
	YOKE END	Actions ▾ T208634		A.2	Parking Brake	In Work	2007-10-11 12:50 EDT	Dependent
	PLATE	Actions ▾ T207097		A.1	Parking Brake	In Work	2006-08-15 10:16 EDT	Dependent
	75366	Actions ▾ AT75366		A.1	844J 4WD Loader	In Work	2006-08-15 10:16 EDT	Dependent
	75053	Actions ▾ AT75053		A.1	844J 4WD Loader	In Work	2006-08-15 10:16 EDT	Dependent

(0 objects selected)

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We are then able to view the information page for the package that we have just created. This package is now managed in the system, allowing users to subscribe to it, lock and deliver it (to both Windchill users and non-Windchill users), and revise and manage it.

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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!](#)

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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Upcoming Events & Training Class Schedules

Upcoming, 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.

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