



new!

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new!

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## PTC Product Focus

### Pro/TOOLMAKER

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## PTC Product Focus

### ProjectLink Role Configuration

Did you know that Project Managers can limit team members Actions in the User Interface depending on the role that user plays in a project? .

Let's take a closer look at how this can be accomplished.

#### Configure Roles

Configuring roles is performed from the Team page in a project. Project Managers would select the Configure Roles icon to edit a role's ability to take action with in the project.

The screenshot shows the Windchill web interface. At the top, there is a navigation bar with links like 'Home', 'Product', 'Project', 'Change', 'Library', 'Reports', 'Organization', 'Site', and 'Suppliers'. Below this is a search bar and a 'Go' button. The main content area is titled 'Steve I Project' and shows a 'Recent Projects' dropdown and a 'Status' indicator (green, yellow, red) with 'State: Running'. A search bar for the project is also present.

The 'Members By Role' section is expanded, showing a toolbar with icons for 'Copy', 'Paste', 'Remove', 'E-mail', 'Configure Roles' (highlighted with a red box), 'Expand', 'Collapse', 'Add Roles', 'Add Members', 'E-mail Team', 'Update Invitation', and 'Refresh Groups'. Below the toolbar is a table with columns: Roles/Members, Joined, E-mail, Phone, and Organization.

Roles/Members	Joined	E-mail	Phone	Organization
<ul style="list-style-type: none"> <li>Designer           <ul style="list-style-type: none"> <li>Designer, Dave</li> <li>Engr, Mike Manufacturing</li> </ul> </li> <li>Guests</li> <li>Members           <ul style="list-style-type: none"> <li>Manager, Peter Project</li> </ul> </li> <li>Project Manager           <ul style="list-style-type: none"> <li>Ingham, Steve</li> </ul> </li> <li>Supplier           <ul style="list-style-type: none"> <li>Supplier, Simon</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Yes</li> <li>Yes</li> <li></li> <li>Yes</li> <li>Yes</li> <li>Yes</li> </ul>	<ul style="list-style-type: none"> <li>dave@wchill.com</li> <li>mike@wchill.com</li> <li></li> <li>peter@wchill.com</li> <li>steve@wchill.com</li> <li>simon@wchill.com</li> </ul>		<ul style="list-style-type: none"> <li>PTC</li> <li>PTC</li> <li></li> <li>PTC</li> <li>PTC</li> <li>supplier</li> </ul>

At the bottom of the page, there is a footer with the PTC logo, navigation links, and copyright information: 'Powered by Windchill® About Windchill Copyright © 2005 Parametric Technology Corporation. All Rights Reserved.'

Once the Configure Roles icon is selected, the project manager is presented with a screen in which they select or deselect the Actions they want a particular Role to access. By deselecting Actions under a specific role, the user in the Role will no longer have the options within their view of the project.

In this example, the Project Manager has removed the Supplier role's ability to take action on multiple items.

### Configure Roles

Select check boxes below role name to allow action.

Actions	All Members	Designer	Guests	Members	Project Manager	Supplier
Create Folders	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Create Action Items	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Create/Update Route	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Modify Team	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	✓	<input type="checkbox"/>
View/Update Access	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	✓	<input type="checkbox"/>
Manage Parts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View Discussions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View References	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View Routing History	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View Iteration History	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View Project Details Page	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View Team Page	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	✓	<input type="checkbox"/>
View Plan Page	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View Forum Page	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View Meetings Page	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View Resources Page	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
View Assignments Page	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View Reports Page	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cut	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Copy	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Paste	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Delete	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Create Documents	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

OK Cancel

Note the difference in the Project Menu links and the Dashboard in the Folders view in the Supplier to other project members.

## Supplier Role

Windchill

Learn | Help | Publications | E-mail Page | Hot Links | Copy Page

Home | Product | Project | Change | Library | Reports

Projects List | Dashboard | **Folders** | Assignments | Forum

Steve | Project    Recent Projects: [dropdown]    Status: [green] [yellow] [red]    State: Running

Search within this project: [input] Go

**Folders**    Current View: Folders and Contents

Export File Structure    Add to Hot Links    Expand    Collapse    Create Document    Create Multiple Documents    Import File Structure    Create from Template    Create Link

Name	Actions	Version	State	Modified By	Last Modified
General	See Actions				Nov 11, 2006, 1:57 PM
Specifications	See Actions				Jul 15, 2007, 8:39 PM

Projects List | Dashboard | **Folders** | Assignments | Forum

PTC    Home | Product | **Project** | Change | Library | Reports

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## Other Project Members

Windchill

Learn | Help | Publications | E-mail Page | Hot Links | Copy Page

Home | Product | Project | Change | Library | Reports | Organization | Site | Suppliers

Projects List | Dashboard | Details | **Folders** | Plan | Team | Resources | Meetings | Assignments | Forum | Workspaces | Reports | Templates | Utilities

Steve | Project    Recent Projects: [dropdown]    Status: [green] [yellow] [red]    State: Running

Search within this project: [input] Go

**Folders**    Current View: Folders and Contents

Cut    Copy    Paste    Delete    Route    Export File Structure    Add to Hot Links    Expand    Collapse    Create Folder    Create Document    Create Multiple Documents    Import File Structure    Create from Template    Create Part    Create Link    Access Control    Refresh Project

Name	Actions	Version	State	Modified By	Last Modified
Design	See Actions				Jul 15, 2007, 8:39 PM
General	See Actions				Nov 11, 2006, 1:57 PM
Specifications	See Actions				Jul 15, 2007, 8:39 PM
CONTROL_KNOB_1	See Actions	1.1	Design	Steve Ingham	Mar 1, 2007, 3:22 PM
CONTROL_KNOB_12	See Actions	1.1	Design	Steve Ingham	Mar 1, 2007, 3:31 PM

Projects List | Dashboard | Details | **Folders** | Plan | Team | Resources | Meetings | Assignments | Forum | Workspaces | Reports | Templates | Utilities

PTC    Home | Product | **Project** | Change | Library | Reports | Organization | Site | Suppliers

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For more information please review Managing Project Team Members and Roles under Administering Projects in the Windchill Business Admin Guide.

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## Tips of the Month

### Expert Machinist – Less is More

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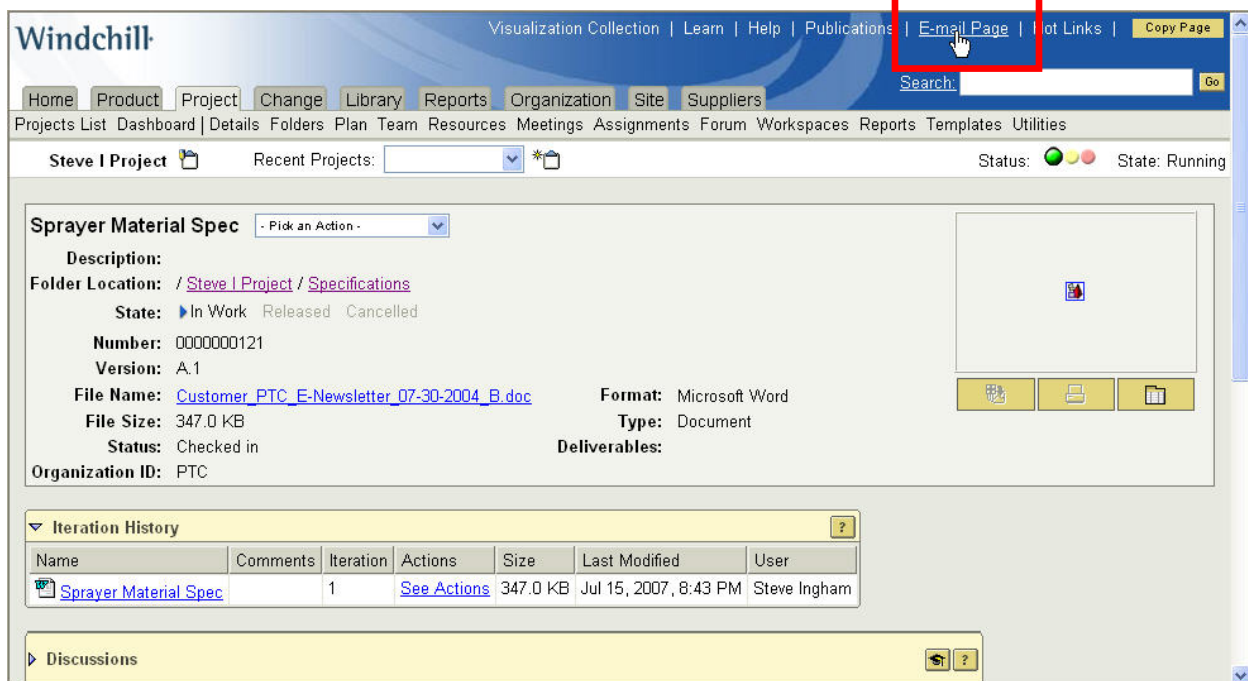
## Tips of the Month

### E-mailing a Page From Anywhere in Windchill

Did you know you can email any page to a team member from within Windchill?

In the top right menu bar on any Windchill page there is an E-mail Page. This feature allows you to send a link to any information to a team member without initializing a Route.

Just navigate to the details page, folder, etc., and select the [E-mail Page](#) link.



The screenshot shows the Windchill web interface. At the top, there is a navigation bar with the following links: Visualization Collection | Learn | Help | Publications | **E-mail Page** | Hot Links | Copy Page. Below this is a search bar with the text 'Search:' and a 'Go' button. The main content area displays details for a 'Sprayer Material Spec' document. The document information includes: Description, Folder Location: / Steve I Project / Specifications, State: In Work, Number: 0000000121, Version: A.1, File Name: Customer\_PTC\_E-Newsletter\_07-30-2004\_B.doc, Format: Microsoft Word, File Size: 347.0 KB, Type: Document, Status: Checked in, Deliverables, and Organization ID: PTC. Below the document details is an 'Iteration History' table with columns for Name, Comments, Iteration, Actions, Size, Last Modified, and User. The table contains one entry for 'Sprayer Material Spec' with Iteration 1 and user Steve Ingham. At the bottom, there is a 'Discussions' section with a question mark icon.

You are then presented with a screen where you can:

- 1.) select recipients of the email,
- 2.) Enter in a Subject and
- 3.) Fill out the message the recipients will receive.

When selecting recipients, you have the ability to select individuals or entire Groups with in the Team.

You also have the ability to utilize your own mail client by selecting the [Use my own Mail Client](#) in the upper left corner of the screen.

The screenshot shows a web-based email client interface. At the top left, there is a link labeled "Use my own Mail Client". Below this, a section titled "\* Select recipients:" contains a table with columns for "Groups" and "Users". The "Users" column is highlighted with a red box and a red number "1". In this column, three users are checked: "Designer, Dave", "Engr, Mike Manufacturing", and "Ingham, Steve". Below the table, the "Subject:" field is highlighted with a red box and a red number "2", containing the text "Specification Document". Underneath, the "Message:" field is highlighted with a red box and a red number "3", containing the text "Dave, Mike, Here is a link to the specification document you both have been looking for. Thanks Steve". At the bottom right, there are three buttons: "OK", "Apply", and "Cancel". A small asterisk note at the bottom left states "\* Indicates required fields."

Groups	Users	
<input type="checkbox"/> All Members	<input checked="" type="checkbox"/> Designer, Dave	<input type="checkbox"/> Manager, Peter Project
<input type="checkbox"/> Designer	<input checked="" type="checkbox"/> Engr, Mike Manufacturing	<input type="checkbox"/> Supplier, Simon
<input type="checkbox"/> Guest	<input checked="" type="checkbox"/> Ingham, Steve	
<input type="checkbox"/> Members		
<input type="checkbox"/> Project Manager		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Supplier		
<input type="checkbox"/> supplier		

Subject: Specification Document

Message: [Look at this.](#)

Additional text for the message:

Dave, Mike,  
Here is a link to the specification document you both have been looking for.  
Thanks  
Steve

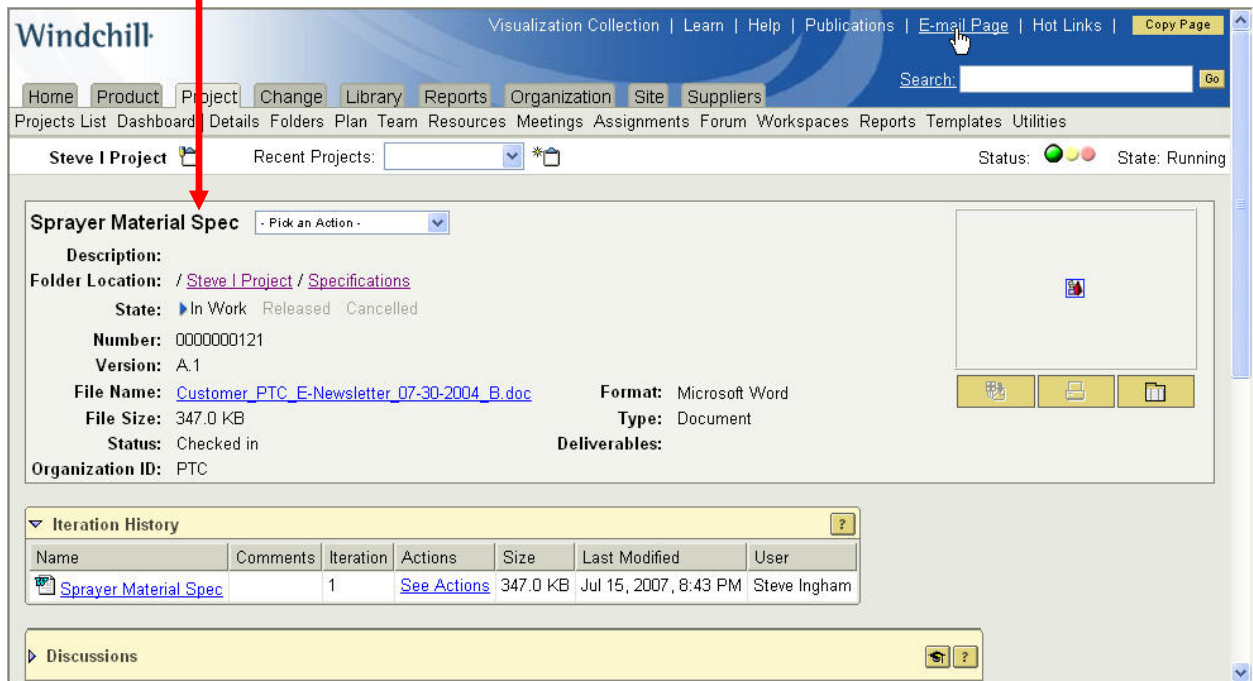
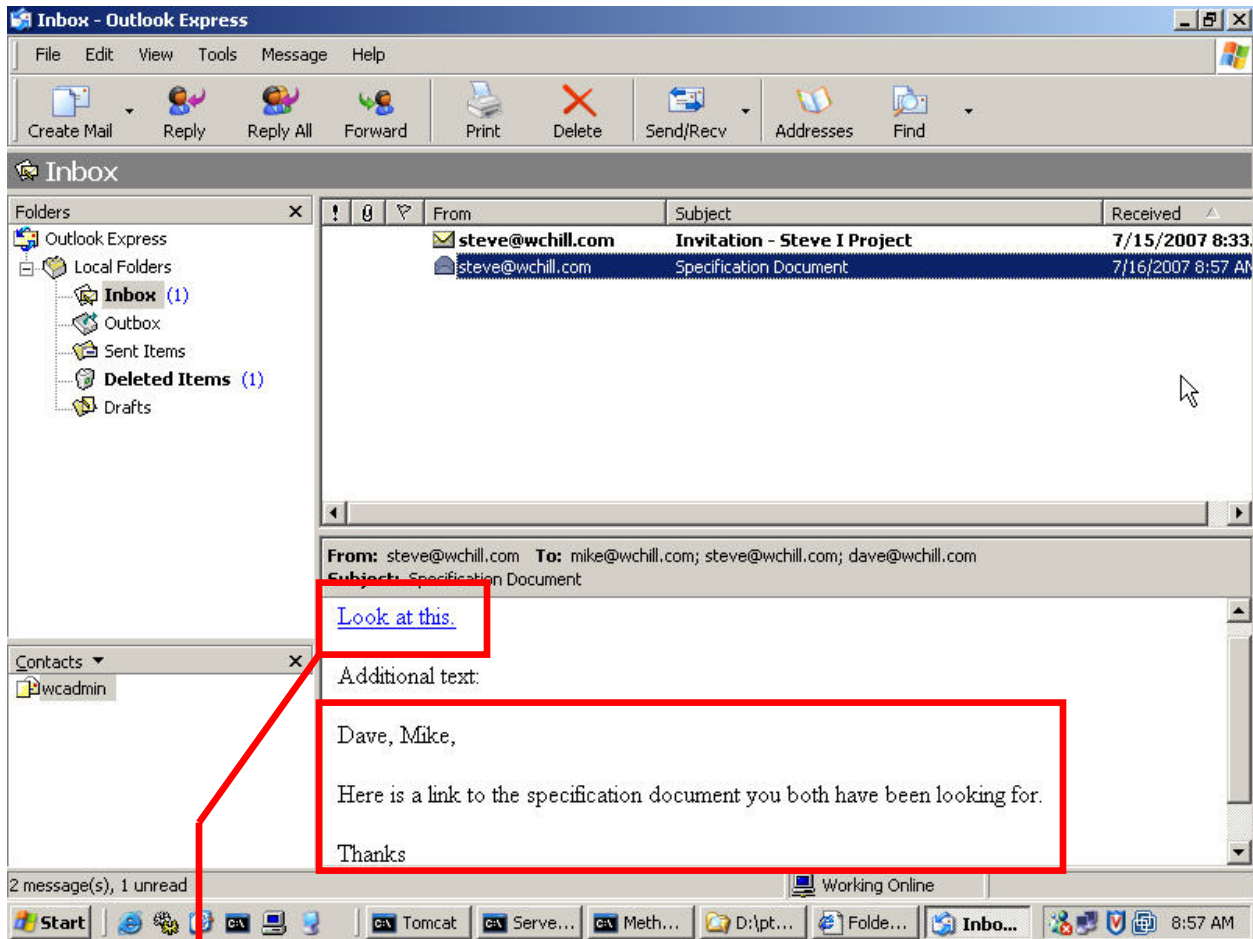
\* Indicates required fields.

OK Apply Cancel

When complete, click the OK button and the system will send the emails to the recipients selected.

**Note: I always select myself as recipient so I have a sent record in my email.**

The email is received with the information outlined with a active link back to the originating page. In this case it was the details page of a specification document.



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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 Covenant of the Ark!

### 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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## Upcoming Events & Training Class Schedules

Upcoming, 2007      Your local Pro/Engineer User Groups  
<http://www.ptcuser.org/rugs/>

2008      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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