Customer PTC E-Newsletter
Date: 9/3/03

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PTC Product Focus

Windchill ProjectLink

Driving product development through project collaboration

Windchill® ProjectLink™ is the first solution that delivers comprehensive, real-time project collaboration for all members of your extended product development team. It drives innovation by providing Web-based, virtual workspaces with all the tools necessary to bring globally dispersed design team members together as if working in the same room.

Windchill ProjectLink features intuitive, self-service administration. Launching new projects is easy; a user simply logs on, sets up the project from a customer-defined template, invites participants, and the team is off and running, with minimal IT support. Topic-based tutorials provide dynamic visual examples to assist users.

Windchill ProjectLink is a quick-start, turnkey solution; it's easy to get it up and running and easy for everyone to use. Our standard implementation can be completed in as little as two weeks. That means low cost and big benefit. You can choose to host Windchill ProjectLink internally on your own server, or select an ASP model and host it on a partner's server.

Windchill ProjectLink enables enterprises to:

• Energize innovation through real-time collaboration inside or outside the firewall with their extended value chain
• Accelerate time-to-market by providing common virtual workspaces for dispersed project teams
• Reduce product and overhead costs by delivering timely and accurate information to project team members
• Differentiate themselves by facilitating interactive customer participation in product development

Capabilities Overview

• Self-service project management, enabling users to track milestones, activities, tasks, deliverables, and resources
• Central repository for all project-related information
• Lightweight visualization of information from various CAD authoring tools
• Streamlined process management through automated workflow
• Change visibility through subscription and notification
• Discussion forums
• Online collaborative meetings

The Project Portal

The Windchill ProjectLink project portal is a dedicated workspace where the project team can track the project schedule, deliverables, cost, status, and associated tasks; manage project-related information; and collaborate interactively through online discussions and live Web-based meetings.

Tracking project status has never been easier or more accurate; reporting mechanisms and status indicators raise flags; management can research problems.

The User Portal

The Windchill ProjectLink user portal offers a personal view of a user's specific projects and activities. A user can easily manage their responsibilities and deliverables through a consolidated view across multiple projects.

Project Management

Windchill ProjectLink enables closed-loop project management where the project owner can set a schedule and the entire team can access it, and directly report their progress. As a result, the most up-to-date information is always available to all parties. Features include:

• Deliverables-based project management

• Configurable and reusable project templates
• Automated delivery and execution of scheduled activities
• Hierarchy of projects
• Import of a Microsoft® Project plan
• Export of a Windchill ProjectLink project plan
• Executive dashboard with essential project information
• Reports detail project data
• Total project cost, resource, and effort tracking
• Action item capture and resolution management
• Configurable timeline with status of key project events

Tracking project status has never been easier or more accurate; reporting mechanisms and status indicators raise flags; management can research problems.

Information Management

Windchill ProjectLink can manage a vast range of information regardless of systems, organizational differences, or geographic boundaries. Participants can author, access, and manage this data so that the right information is available when team members need it.

• Folder-based storage and controlled access to project information such as specifications, design notes, manufacturing plans, part definitions, bills of materials, software modules, and 2D and 3D designs
• Check-in and check-out functions for concurrency control
• Complete change history
• Document templates
• Automated or ad hoc routing of documents and parts for review and approval
• Access control rules for individual documents, parts, and folders
• Lightweight visualization and markup of many document formats
• Discussion forums linked to project data for focused and secure collaboration
• Personal notebook to manage links to important information
• XML-based import and export of project information to and from other projects, corporate enterprise systems, or other exchanges

CAD Integration

Windchill ProjectLink is capable of managing collaboration around extremely complex 2D and 3D design information from many CAD applications.

• Direct integration from leading MCAD authoring tools such as Pro/ENGINEER®, Pro/DESKTOP®, CATIA®, AutoCAD®, I-DEAS®, SolidWorks®, and

Easily view, modify, and mark-up project information.
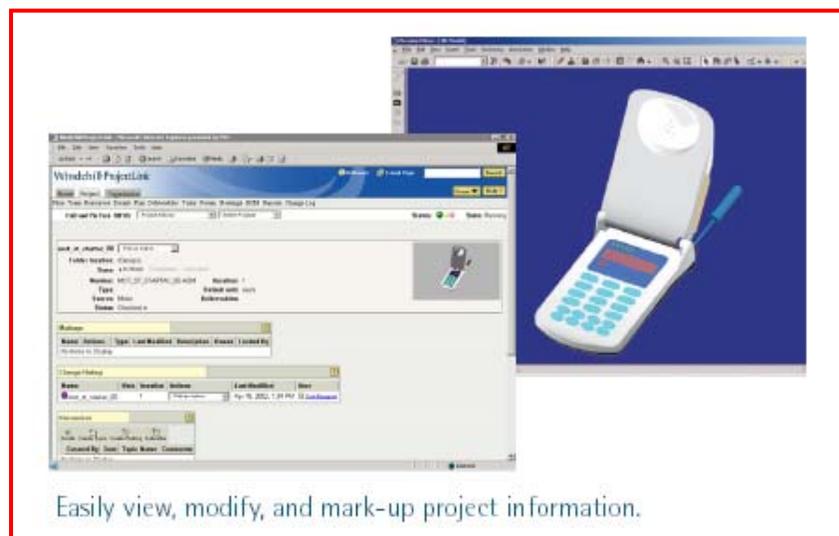
Unigraphics® for viewing and editing
• Product structure management
• Visualization and mark-up of 2D and 3D data from MCAD and ECAD tools such as Cadence®
and Mentor Graphics®
• Peer-to-peer collaboration with visualization software
• Data is managed using the tools described in the Information Management section

Automate Business Processes

Windchill ProjectLink employs a powerful workflow engine that automates many business
processes to streamline product development while removing distance barriers.

• Reusable workflow templates automate common processes
• Tailorable forms define process tasks and tie together relevant information
• Automatic distribution of tasks to team members
• Deadlines with escalation policies for proactive and follow-up notifications
• Task reassignment to help project leaders relieve bottlenecks and facilitate workflow
• Advanced workflow definition capabilities to automate proprietary processes, including support
for nested processes, process referencing, conditional branching, voting, synchronization, timers,
iterative loops, and response-based routing

Communication

With Windchill ProjectLink, project team members can instantly share ideas and build off the
input of each other with features including:

• Discussion Forums
• Online Meetings
• Subscription and Notification

Scalable and Secure

Windchill ProjectLink is fully scalable, capable of handling hundreds—even thousands—of
concurrent users. Support for Oracle and Java 2 enables maximum performance advantages.
Windchill ProjectLink offers three levels of security features essential for managing projects on
the Internet:

• User Authentication: Uses standard Web server authentication
• Project Access: Allows you to seal off activity around discrete projects
• File Access: Enables data owners and project managers to set access control rights for
individual folders, documents, parts, and CAD models

Powered by Windchill

Windchill ProjectLink is based upon Windchill technology, a proven, scalable, Web-based
platform that uses standard Web technology to perform common information management
functions. This technology delivers seamless compatibility with standard Web servers, browsers,
Java 2EE and Java Beans, Java Server Pages, Java Message Service, HTML, HTTP, HTTPS,
XML, XSL, SOAP, and LDAP.

Windchill technology supports existing Web infrastructure, allowing the use of any Web security model, including support for Oracle 8i, which ensures high performance and secure data storage.

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Tips of the Week

Best Practice On How To Check A Document In/Out of Windchill ProjectLink

Document Management
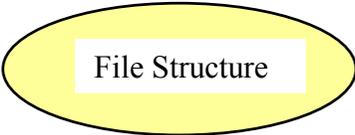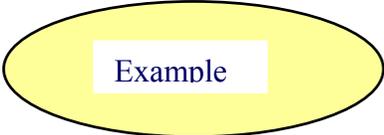
Objectives   File Structure   Example

By the end of this document you will be able to achieve the following actions in Windchill ProjectLink:

Use Project Documents

- Upload project documents
- View documents in file repositories
- Check out, modify and check in documents

Project Documents – Benefits
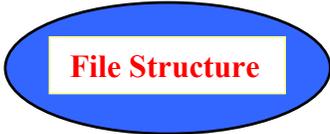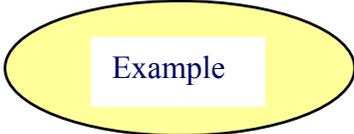
Objectives   **File Structure**   Example

	File repository maps typical project lifecycle	Standard file structure and document templates
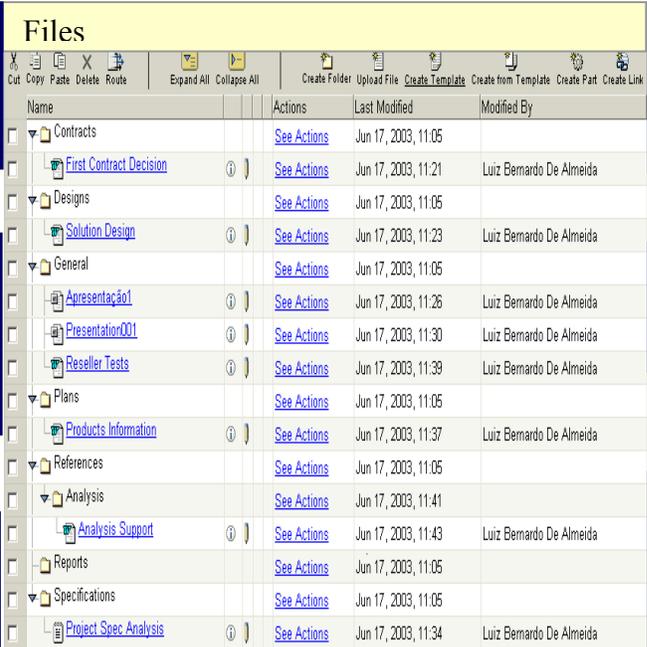
Files

Cut Copy Paste Delete Route   Expand All Collapse All   Create Folder Upload File Create Template Create from Template Create Part Create Link

Name		Actions	Last Modified	Modified By
▼ Contracts		See Actions	Jun 17, 2003, 11:05	
First Contract Decision	ⓘ	See Actions	Jun 17, 2003, 11:21	Luiz Bernardo De Almeida
▼ Designs		See Actions	Jun 17, 2003, 11:05	
Solution Design	ⓘ	See Actions	Jun 17, 2003, 11:23	Luiz Bernardo De Almeida
▼ General		See Actions	Jun 17, 2003, 11:05	
Apresentação1	ⓘ	See Actions	Jun 17, 2003, 11:26	Luiz Bernardo De Almeida
Presentation001	ⓘ	See Actions	Jun 17, 2003, 11:30	Luiz Bernardo De Almeida
Reseller Tests	ⓘ	See Actions	Jun 17, 2003, 11:39	Luiz Bernardo De Almeida
▼ Plans		See Actions	Jun 17, 2003, 11:05	
Products Information	ⓘ	See Actions	Jun 17, 2003, 11:37	Luiz Bernardo De Almeida
▼ References		See Actions	Jun 17, 2003, 11:05	
▼ Analysis		See Actions	Jun 17, 2003, 11:41	
Analysis Support	ⓘ	See Actions	Jun 17, 2003, 11:43	Luiz Bernardo De Almeida
Reports		See Actions	Jun 17, 2003, 11:05	
▼ Specifications		See Actions	Jun 17, 2003, 11:05	
Project Spec Analysis	ⓘ	See Actions	Jun 17, 2003, 11:34	Luiz Bernardo De Almeida

Shared repository for team members storing all project documentation

Check out facility to ensure iteration control

Controlled team access to files and folders

Document history to track the changes made to documentation

Mode Type

The file structure allows the end user to check in or out a document from ProjectLink in 3 types of modes.

- Regular Check in/out
- Edit
- Update

As described below:

• *Regular Check in/out* is the most recommended way to work because it allows all users to see what state the document is in and if it is in work, by whom.

• *Edit* allows the user to check out a document directly into the document application and start work straight away on the document.

• *Update* allows the user to check in a document without checking it out first. This will also iterate the document!

Checking In a file for the first time

Objectives   File Structure   Check In/Out
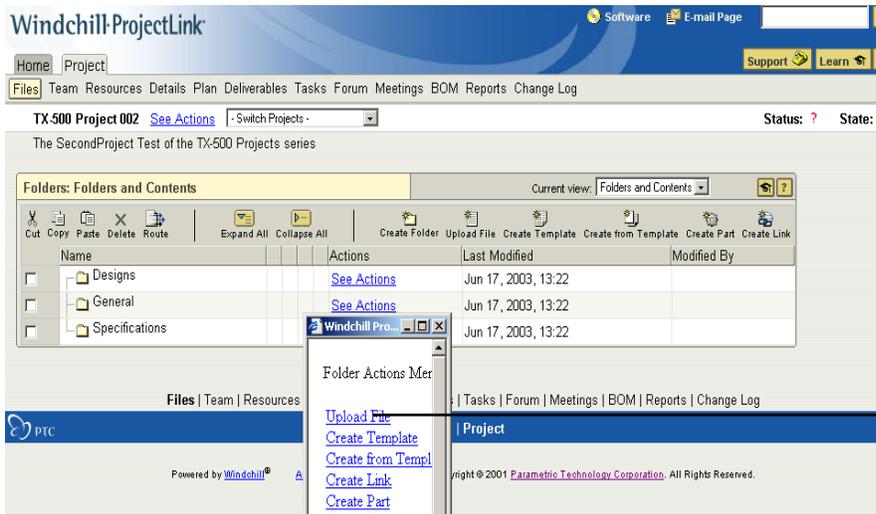
- To check in a file for the first time use the "Upload File" option from beside the folder where the document will reside.
- The Upload File icon can also be used. The main difference in using this option is that you must specify the location of where you want the document to reside.


- Browse for the file that will be checked in.
- Specify a name.
- Choose the document Type.
- Choose the location where the document will reside.

- Specify the Access Control for the document.

Checking Out Documents
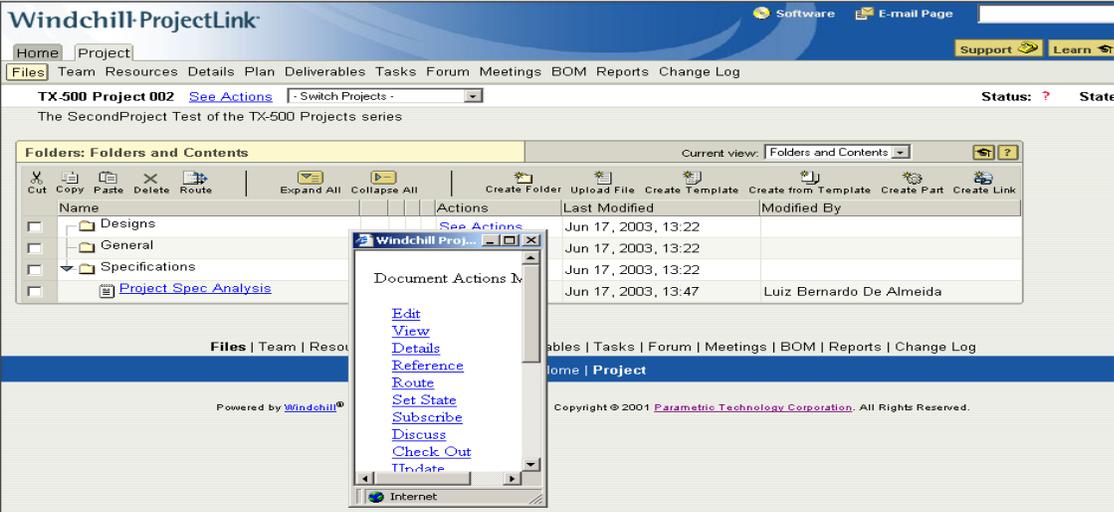
- The document will now indicate that it is checked out in 2 different ways.

First: A red tick mark beside the document.
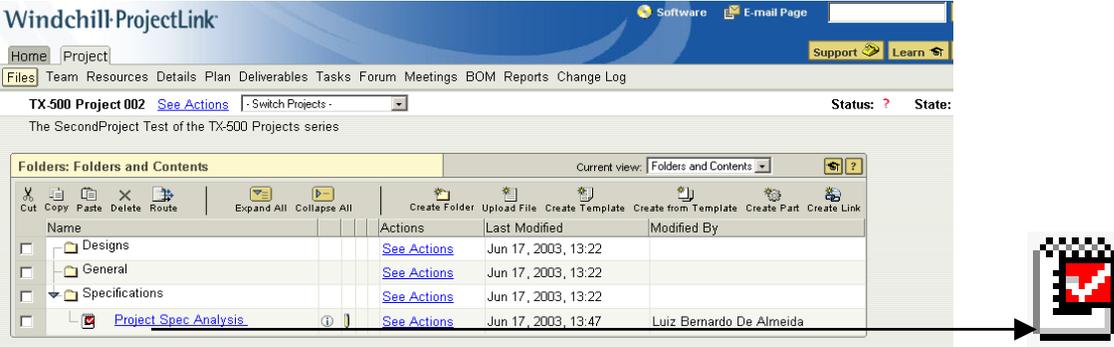
Second: In your home page under the "My Checked Out Work" section the checked out document will show up.

- A document can only be modified by one user at a time.
- Users can see who is working on the document by entering the details page of the document and having a look at the Status.

> If we make a mistake during the check out process, we can use the command **Undo Checkou**t to undo it

Editing a Document

- Click the See Actions link to open the Document Actions Menu.
- Modify the document and save it with a new name.

Checking in a document

Document Actions Menu

Edit
View
Details
Reference
Subscribe
Discuss
Check In
Undo Checkout

- Choose the "Check In" option from the drop down list.

- Browse for the newly saved document.

- Click "OK".

Document Iterations

▪ Click on the details page for the document and the "Change History" section will show a list of the iterations of the document.

Editing a document

If you need to download the file to work on it, instead of checking it out, you can use the Edit command.

- Edit will check out the document and download its contents

To Edit Documents:

- Locate the Document

- Select Edit (or click the edit icon)

- ProjectLink will check out and download the document for you to modify it.

- Modify and save it with your modifications.

Updating Details - Documents

How can we update a document name?

▪ On the Project Tab select File

▪ To the right of the document (Project Spec Analysis), click <u>See Actions</u> link, and click <u>Update</u> link from the Document Action Menu.
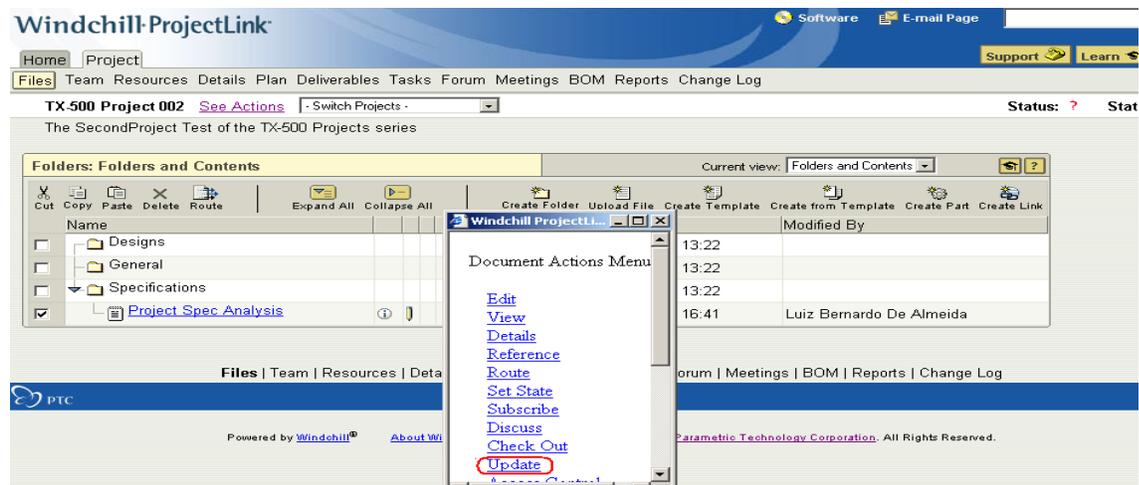
- Update the Name
- Click ok button

Creating a Document from a template

How can we create a document from a template?

- On the Project Tab select Files

- Click on the **"Create from Template"** option.

Or

- Choose "Create from Template" form the **icon** above it.

- Choose the Template from the drop down list

- Fill in document name

- Fill in Description

- Choose Location from drop down list

- Click "Next" to specify Access Control

Hot tip: if you are using Windows Explorer, and your browser open the file that you are trying to check out, this can be reset on your Windows explorer under the Folder Options Menu at File Types, then " Confirm open after Download" setting (under Advanced button), after that check the box that it will be displayed for the desired particular file.

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Announcements

Special Hardware offers for customers updating to Pro/ENGINEER Wildfire

http://www.ptc.com/partners/hardware/current/wildfire_tlo.htm
http://www.3dlabs.com/PTC/

PTC Sponsored Events

Click below to see PTC sponsored events:

http://www.ptc.com/company/news/events/index.htm

Thinking About Pro/ENGINEER Wildfire? Check this out.

http://www.ptc.com/go/engineering/index.htm

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. Future plans include several foreign-language editions of
Profiles for our many international readers. Currently, Profiles is printed in English and
Japanese.

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, 2003   Your local Pro/Engineer User Groups
                          http://www.prouser.org/rugs/

June 13 - 16, 2004   Nashville, TN
                          Pro/USER International Conference
                          http://www.prouser.org/

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/E 2001 Student Edition!

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

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 products 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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