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PTC Product Focus

What's New in Sheetmetal for Wildfire 2.0

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PTC Product Focus

Change Management in PDMLink 7.0

Criticality of Change Management

Many times the value of a world class change management system is overlooked. Change can be a wonderful and terrible thing (depending on the circumstances). Managing change effectively can mean the difference between a profitable program or not. Some changes are made that improve, streamline, reduce parts, reduce cost, make products safer and are generally great. Unfortunately, most changes are required due to problems and errors made by the program, oversight and misinterpretation of specifications is only the beginning. Who wants that to get out?

Why aren't executives screaming for world class change management? This process tends to be the domain of those in the trenches, middle management and below. The day to day warriors and their heroic efforts driving the designs, working as much overtime as is required to bring the program in on schedule and on budget...in most cases burn out is the result, and the inefficiencies and overlooked details are waiting to pop up at the worst time (likely in manufacturing or worse yet when sold to the customer!). Most CXO level managers are concerned with the bottom line not necessarily how they got there as a function of their current change process.

A world class change management system, as is available in PDMLink 7.0, can help every business and organization by:

- Reduce the time required to process a change end to end.
- Reduce the number of changes.
- Reduce the cost of change.
- Reduce errors by making change data available to the enterprise while it is in process.
- Gain early visibility of changes to parts and assemblies which may be used in other products or end items.
- Eliminate dual efforts of individuals processing change against the same identical part for the same identical reason.
- Tracking and managing the implementation of change as it occurs.
- Manage disposition of items “in process” as well as effectivity of items resulting from change.
- Maintain a change “Package” that contains all associated data to the change that can be searched for and will be available after the change has been finished.
- Making change metrics available for assessment and constant improvement.

OOTB CMII Compliant

What language is this? Everyone loves acronyms so there you are....Out of the Box , Institute of Configuration Management II Compliant system. What does this all mean?

The Institute of Configuration Management (ICM), www.icmhq.com , founded in the 70's, is headquartered in Scottsdale, Arizona. They are best known for their CMII process which is accepted by many CM professionals world-wide as a 'best industry practice' for change management.

The ICM defines change management as:

“Change management is the business process whereby modifications to product content and documentation become part of the product configuration.”

So what does the II in CM II stand for?

1. Configuration Management (Product Structure Modeling & Change Management).
2. Continuous Improvement.

PTC's strategy is to offer to our customers OOTB, the ICM's CMII change process, which is recognized globally as the industry best practice as the starting point for change. That being said, customers can easily configure this change process to reflect their business practices in areas where this would make practical sense. Many companies find after careful evaluation of their internal change process that when compared to the CM II standard, in general they map, although many find the CM II process picks up some loose ends and is recognized as a more complete process.

One final thought before we get into the Tips section of this newsletter, the ICM's CMII process is also “Closed Looped”. What does that mean? It means participants in the change process are not just responsible to do the work associated with the change, there are specific participants

whose job it is to confirm that the work has been completed. No more proverbial cracks for things to fall through...Amen.

For more details about PDMLink 7.0 and Change Management, please visit the Product area of ptc.com or contact your PTC Account Manager.

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Tips of the Week

Alternative Approach for Modeling Sheetmetal Geometry

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Tips of the Week

OOTB CMII Compliant Change Management Overview

Define the Universe in 3 pages and give 2 examples...

Change Management can be a very complex and overwhelming thing to discuss. To cover it end to end in a newsletter like this would be very much like defining the universe....ok you get it. So what we are going to do is take a very high level look at Change Management and perhaps point out some tips that can get you to a point where you are able to create and run changes through your PDMLink system.

Three Primary Phases

In a nut shell, the CMII compliant process breaks down into three phases:

1. The Problem Report.
2. Enterprise Change Request.
3. Enterprise Change Notice.

In many cases, a Problem Report (PR) would result the creation of an Enterprise Change Request (ECR) which in turn could also result in the creation of an Enterprise Change Notice (ECN). Seems simple enough.

Here's your first tip:

You don't have to start a change with a Problem Report! This is interesting information. You can start a change by creating an ECR.

Next I will define the 3 phases and the typical benefits.

The Problem Report (PR)

- Describe a product problem or enhancement
- Record confirmation and issues
- Connect to official change requests
- Capture resolution
- Can be created by anyone in the enterprise

Benefits:

- Permanent database record of all enhancements / problems.
- Collect multiple Problem Reports for resolution together.

The Enterprise Change Request (ECR)

- Describe product defects or enhancements with references to confirmed problem reports.
- Capture information required for business decision including affected parts and documentation, solution approach, technical risks and cost/benefit analysis.
- Record the business decision.

Benefits:

- Impact analysis is clearly understood and accepted.
- Speeds up analysis and decision making.
- Keeps a historical record.

The Enterprise Change Notice (ECN)

- Formulate work plan to implement a set of approved ECRs.
- Follow plan through modification and release of affected product information, production of new parts and inventory disposition.

Benefits:

- Work tasks are clearly understood and communicated.
- Data to be changed is associated and launched from the ECN task.

Where do I Start?

In PTC's PDMLink system, the starting point for change is a PR or an ECR. A PR or an ECR must be associated with or related to something in the system. A part or an assembly for example. That being said, the data must be in the system to relate a PR or ECR to it.

Once you have identified and navigated to the related information in the Product Area, you use the pull down menu to “Create Problem Report”. (We’ll use all 3 phases in this example).

Home Product Project Change Library Organization

Products List | Details Folders Product Structure Team Change Monitor Forum Workspaces Templates Utilities

Challenger 660 Combine Recent Products: []

BRKT WA - L F FDR SHLD

Responsible Product: Challenger 660 Combine
Number: 181546
Name: BRKT WA - L F FDR SHLD
Version: A.1
Type: Separable
Source: Make
View: Design
Status: Checked in
Location: / Challenger 660 Combine

---Actions---
Set Life Cycle State
Discuss
Check Out
Associate Document
Create Problem Report
Create ECR
Delete
Copy
Add to Project
Export
Product Information Manager
Create Representation

Product Structure —
Related Documents

Configuration: Latest 'Design' including work in progress Related Reports: Single L

Once “Create Problem Report” is selected, click on “Go”, next to the actions drop down menu.

A wizard will pop up that will step you through the creation of your problem report.

Create Problem Report (PR) - Mozilla Firefox

Create Problem Report (PR)

Description Affected Data Affected End Items Attachments

Responsible Product: Challenger 660 Combine

* PR name: []

Reported by: []

* PR classification: Cost Reduction

* Priority level: Low

* Problem description: []

Submit Now Later

* Required fields

OK Cancel

Tip: Note at the bottom of the first page are two button options for the submittal of your Problem Report. Submit “Now” or “Later”. Why? People get busy and they don’t always have all the required data for a particular report. This option allows for someone to start a PR with the data they do have, keeps the problem from falling through the cracks, and then allows them to come back and add data to the report before submitting it as an official Problem Report!

If you have been following this article there has been many references to “process”. In PDMLink the idea of process takes on a whole new meaning. Why? Because PDMLink uses what is known as “Workflow” to automate process with software. Think of it like this, a process flow or chart, like a Visio Chart is taken and emulated in PDMLinks workflow engine. This process then is executed by the system when people do things like create a PR or ECR. People that are assigned to Product teams are assigned to do specific jobs or fulfill roles on that Product Team. The workflow process is programmed to assign tasks to specific individuals who would ordinarily be responsible to do the work at that point in the process. Because people move around within companies, get promoted, have babies move on to bigger and better things, it would be very difficult to keep updating the processes so workflow uses the role of the job when a task is assigned. Whoever is fulfilling the role at the time the workflow process starts, gets the task.

Back to the Change Process....

Individuals assigned to review the PR will receive notification of their tasks. If it is determined that the Problem Report should be considered for a formal change an ECR is created. Very similar to the creation of a Problem Report. Navigate to the data that is being consider for the change and pull down the menu, Select “Create ECR” then click on “Go”, next to the actions drop down menu.

The screenshot displays the PDMLink web application interface. At the top, a navigation bar contains tabs for Home, Product, Project, Change, Library, and Organization. Below this is a secondary navigation bar with links for Products List, Details, Folders, Product Structure, Team, Change Monitor, Forum, Workspaces, Templates, and Utilities. The main content area is titled 'Challenger 660 Combine' and features a 'Recent Products' dropdown. The central focus is on a product named 'BRKT WA - L F FDR SHLD'. To the left of the product details is a 3D CAD model of a mechanical component. The product details list the following information: Responsible Product: Challenger 660 Co, Number: 181546, Name: BRKT WA - L F FDR SHLD, Version: A.1, Type: Separable, Source: Make, View: Design, Status: Checked in, and Location: / Challenger 660 Co. An 'Actions' dropdown menu is open, showing options such as Set Life Cycle State, Discuss, Check Out, Associate Document, Create Problem Report, Create ECR (highlighted), Delete, Copy, Add to Project, Export, Product Information Manager, and Create Representation. At the bottom of the interface, there are fields for 'Product Structure', 'Configuration' (set to 'Latest Design including work in progress'), and 'Related Reports' (set to 'Single L').

A wizard will pop up that will step you through the creation of your ECR.

The screenshot shows a web browser window titled "Create Enterprise Change Request (ECR) - Mozilla Firefox". The browser's address bar is empty. The page has a blue header bar with the title "Create Enterprise Change Request (ECR)" and a question mark icon. Below the header is a tabbed interface with five tabs: "Description", "Affected Data", "Affected End Items", "Attachments", and "Associated PRs". The "Associated PRs" tab is selected and highlighted with a red circle. The main content area is a form with the following fields and labels:

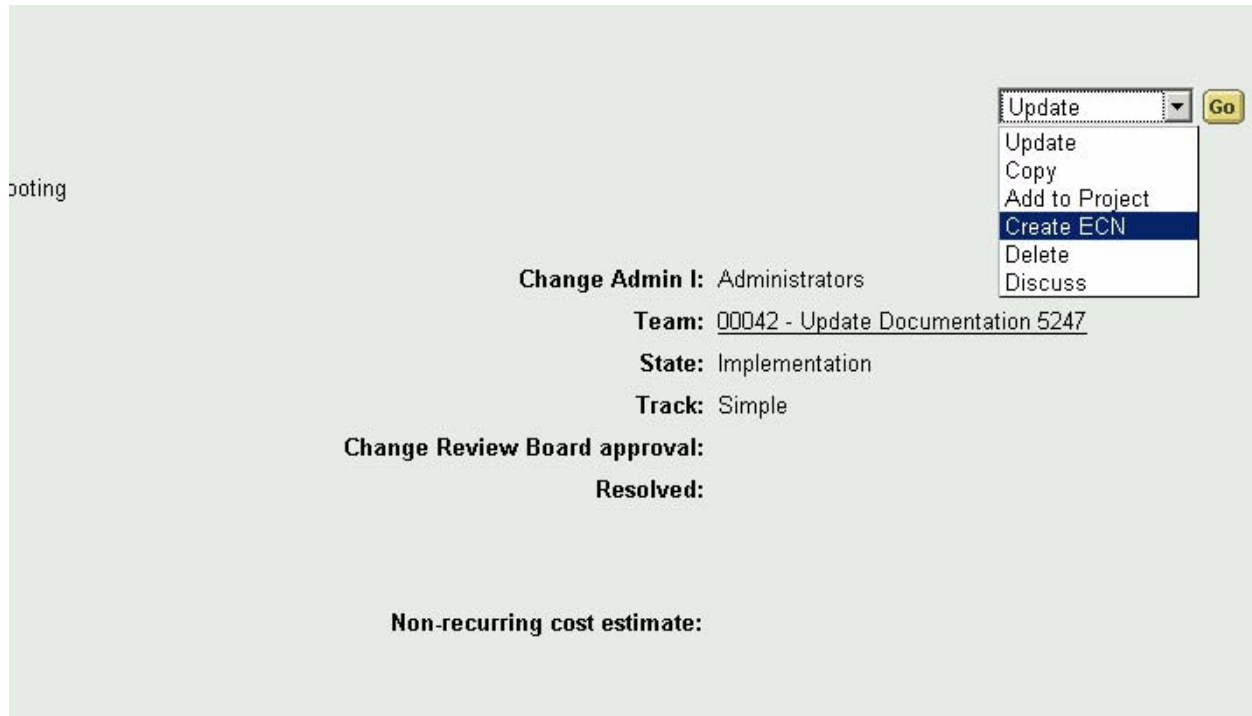
- Responsible Product:** Challenger 660 Combine
- * ECR name:** [Text input field]
- * ECR classification:** Cost Reduction [Dropdown menu]
- * ECR description:** [Text input field]
- Proposed solution:** [Text input field]
- * Priority level:** Low [Dropdown menu]
- Need by:** [Text input field] (MM/DD/YYYY)
- Recurring Cost Estimate:** [Text input field]
- Non Recurring Cost Estimate:** [Text input field]
- Submit** [Radio button] **Now** [Radio button] **Later** [Radio button]

At the bottom of the form, there is a small asterisk and the text "* Required fields". At the bottom right of the browser window, there are "OK" and "Cancel" buttons.

Tip: In the graphic above note the tab for "Associated PRs". In this area you associate the Problem Report that lead to this ECR. In fact, you or others, may recognize that multiple PRs are related and can all be addressed by this one ECR. There is no limit to how many PRs you associate to a single ECR. This reflects the way change happens in the real world. Change dominos through designs and many times a single change affects many many things. Accumulating changes in a single change package saves money and time.

Once a ECR exists, the change will continue through the workflow driven process until a decision is made to go forward with an official change or address the issues outside of the change process.

If the decision is made to go forward, from the ECR that will lead to the ECN we use the drop down menu in the upper right, select “Create ECN”, don’t forget to select “Go”.



oting

Update
Update
Copy
Add to Project
Create ECN
Delete
Discuss

Change Admin I: Administrators

Team: 00042 - Update Documentation 5247

State: Implementation

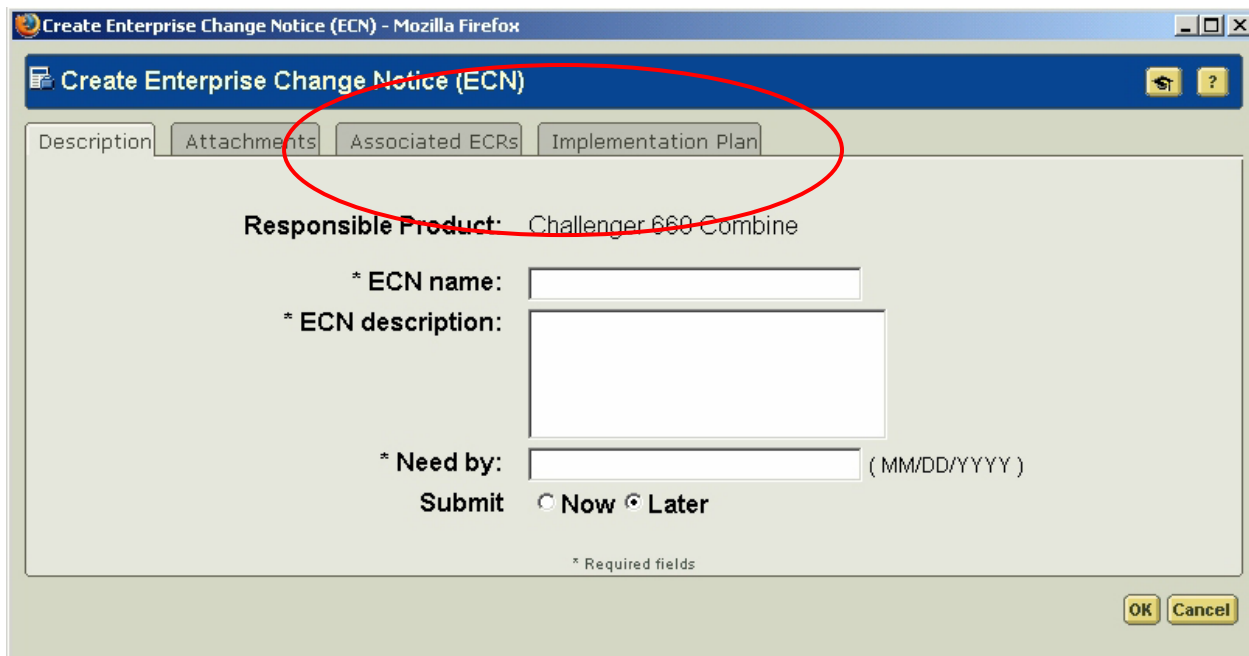
Track: Simple

Change Review Board approval:

Resolved:

Non-recurring cost estimate:

Yep you guessed it, another wizard pops up to create the ECN.



Create Enterprise Change Notice (ECN) - Mozilla Firefox

Create Enterprise Change Notice (ECN)

Description Attachments **Associated ECRs** Implementation Plan

Responsible Product: Challenger 660 Combine

* ECN name:

* ECN description:

* Need by: (MM/DD/YYYY)

Submit ☐ Now ☒ Later

* Required fields

OK Cancel

Tip: Two things to note:

- 1. There is a tab for “Associated ECRs” This is just like in the ECN for Associated PRs. In an ECN multiple ECRs can be associated with a single ECR.***
- 2. One of the most important tabs in the entire change process. “Implementation Plan”. In this area, you create specific work assignments for the individuals who will perform the tasks like, updating models and drawings, updating specifications, etc..***

Once these implementation tasks are complete the workflow sends out its final task and the entire change is audited as part of the CM II closed loop process. Upon approval, the Product Structure/BOM reflects the new revisions of parts affected by the change.

I hope this has helped you understand the OOTB CMII Compliant Change Process within PDMLink. Next time we'll dive in a little deeper.

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Announcements

Live Instructor-Lead Virtual PTC Training Courses

PTC will be offering a series of Virtual Classrooms this quarter for you looking to save money (15% off ILT prices) and cut down on travel.

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 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!](#)

Hands-On Workshops

Experience and receive the next generation of CAD - Pro/ENGINEER Wildfire. During these workshops you can try it yourself to experience this breakthrough in simple, powerful, and connected in CAD software.

http://www.ptc.com/appserver/it/icm/cda/template_lib/events/online.jsp?im_dbkey=17625&im_language=en

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, 2004 Your local Pro/Engineer User Groups
<http://www.ptcuser.org/rugs/>

June 5 - 8, 2005 Orlando, FL
PTC/USER International Conference
<http://www.ptcuser.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/ENGINEER Wildfire 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 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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