



Windchill® PDMLink™ User's Guide

**Windchill® 9.0
September 2007**

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Change Record

The *Windchill PDMLink User's Guide* has been reorganized for release 9.0 to be more task based. For example, all features pertaining to viewing and organizing information are located in one chapter. An index has also been added for your reference.

The following table describes changes to the contents based on enhancements to Windchill PDMLink for version 9.0.

Table 1 Changes for 9.0


Chapter	Description
About Windchill PDMLink	<ul style="list-style-type: none">• Added information about Options and Variants and generic parts.• Added information about notes.• Added an overview of all Windchill solution as well as a more in-depth overview of Windchill PDMLink.
Setting Up Your Environment	<ul style="list-style-type: none">• Added new link to software matrix.• Added information about customizing table views.• Added information about attribute constraints.
Viewing and Organizing Information	<ul style="list-style-type: none">• Added information about contexts and teams.• Added information on visibility.• Added new information on comparison reports.• Added information about moving objects.• Added information about navigation menus and information tables.

Chapter	Description
Finding Information	<ul style="list-style-type: none"> • Added information about using InStream to perform an index search. • Added information about performing a network search. • Added information about the new Folders page. • Added information about Find in Structure and queries in Product Structure Explorer. • Added information about the collector.
Creating Objects	<ul style="list-style-type: none"> • Added information about creating multiple parts. • Added information about creating end item parts and generic parts. • Added information on special characters that should be avoided when creating objects.
Modifying Objects	<ul style="list-style-type: none"> • Added information about variances, annotations, tracking changes, and effectivity in the Change Management section.
Associating and Relating Information	<ul style="list-style-type: none"> • Added content on new Network page. • Added information on creating and relating notes. • Added information on default baselines. • Updated attachments to describe new types of attachments and other enhancements. • Updated notebook to describe new Notebook table for objects, replacing References in some cases, as well as changes to My Notebook.

Chapter	Description
Sharing Information	<ul style="list-style-type: none"> Updated subscriptions to describe the new user interface and added sections for various types of subscriptions. Updated discussions to reflect the renaming of the discussion forums to discussions. Updated information on sharing information between Windchill ProjectLink and Windchill PDMLink or Arbortext Content Manager. Added information on Windchill Clipboard.
Understanding Processes	Updated action items to describe enhancements including editing action items in Microsoft Excel, automatic e-mail notifications, and customizable attributes.
Importing and Exporting Information	Added information on working with action items in Microsoft Excel.
Microsoft Excel File Formats for Importing Parts and Product Structures	Updated new attributes.

About This Guide

This version of the *Windchill PDMLink User's Guide* provides an overview of the concepts and navigation in Windchill PDMLink.

To view procedures for specific functionality, click the help button  on the relevant Windchill PDMLink window or table.

This guide is intended for end users of Windchill PDMLink.

Related Documentation

The following documentation may be helpful:

- *Windchill Business Administrator's Guide*
- *Windchill System Administrator's Guide*

If these books are not installed on your system, see your system administrator.

Technical Support

Contact PTC Technical Support via the PTC Web site, phone, fax, or e-mail if you encounter problems using Windchill PDMLink or the product documentation.

For complete details, refer to Contacting Technical Support in the *PTC Customer Service Guide*. This guide can be found under the Related Links section of the PTC Web site at:

<http://www.ptc.com/support/index.htm>

The PTC Web site also provides a search facility for technical documentation of particular interest. To access this page, use the following URL:

<http://www.ptc.com/support/support.htm>

You must have a Service Contract Number (SCN) before you can receive technical support. If you do not have an SCN, contact PTC Maintenance Department using the instructions found in your *PTC Customer Service Guide* under Contacting Your Maintenance Support Representative.

Documentation for PTC Products

You can access PTC documentation using the following resources:

- **Windchill Help Page** -- Click **Help** in the header of any Windchill page to open the **Windchill Help** page, which provides you with a portal to all Windchill documentation, including:
 - A complete set of current online help topics for your products
 - Product tutorials available on the PTC Web site
 - Windchill manuals for users, administrators, and programmers

In addition, you can click **Search All Help Sources** to access the Windchill Help Center, an online knowledge base that includes a universal index of all Windchill documentation. You can search all of the documentation at once, or use the advanced search capability to customize your search. Once you have located a topic you want to reference later, you can bookmark that topic for quick access and even save your own comments about the topic.

- **Product CD** -- All relevant PTC documentation is included on the CD set.
- **Reference Documents Web Site** -- All books are available from the Reference Documents link of the PTC Web site at the following URL:

<http://www.ptc.com/appserver/cs/doc/refdoc.jsp>

A Service Contract Number (SCN) is required to access the PTC documentation from the Reference Documents Web site. For more information on SCNs, see Technical Support:

<http://www.ptc.com/support/support.htm>

Comments

PTC welcomes your suggestions and comments on its documentation. You can submit your feedback through the online survey form at the following URL:

http://www.ptc.com/go/wc_pubs_feedback

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About Windchill PDMLink

This chapter provides an introduction to functionality and objects available in Windchill PDMLink as well as a short overview of the other Windchill solutions.

Topic	Page
About Solutions.....	1-2
Windchill PDMLink Overview	1-3
Windchill PDMLink Objects.....	1-8

About Solutions

The Windchill product family includes the following solutions that may be installed on your system:

- Windchill PDMLink
 - Windchill MPMLink
 - Windchill Supplier Management
- Windchill ProjectLink
- Pro/INTRALINK 9.0
- Arbortext Content Manager

At times, the term "Windchill" is used to refer to all of these solutions.

When Windchill PDMLink or Arbortext Content Manager are co-installed with Windchill ProjectLink, you can seamlessly make PDM business data from a product or library available in a project or program, thus allowing development to occur in a collaborative environment with project management capabilities. At the point in development when it becomes advantageous, you can return and send new data to the product or library. For more information, see the [Sharing Information](#) chapter.

Windchill PDMLink

Windchill PDMLink is a product data management system that manages all information related to product development while optimizing business processes throughout the life of a product.

Windchill MPMLink

Windchill MPMLink supports Manufacturing Process Management (MPM) processes with an integral solution where product, process and resource data are all managed in a single system, without the need for data duplication. When you install Windchill MPMLink on your Windchill PDMLink system, additional explorers are installed. For more information, see the *Windchill MPMLink User's Guide*.

Windchill Supplier Management

Windchill Supplier Management enables companies to integrate and manage supply chain data within Windchill. In addition to helping companies track their supplier parts, Windchill Supplier Management improves the part selection process by making manufacturer and vendor data available early in the design phase. Windchill Supplier Management is intended for use in conjunction with Windchill PDMLink. For more information, see the *Windchill Supplier Management Administrator's and User's Guide*.

Windchill ProjectLink

Windchill ProjectLink is a solution for collaborative product development, as well as project management and execution. It enhances the ability of geographically and organizationally dispersed teams to work together more efficiently on highly iterative design projects or programs. By providing access to the right product development and project management capabilities at the right time, Windchill ProjectLink helps keep the team aligned and the project or program on track.

Pro/INTRALINK 9.0

Pro/INTRALINK 9.0 is a solution for Pro/ENGINEER workgroup data management. Pro/INTRALINK 9.0 manages the power of Pro/ENGINEER data associativity and enables concurrent engineering among distributed design teams.

Arbortext Content Manager

Arbortext Content Manager is an optimized solution for managing XML documents authored with Arbortext Editor. By supporting collaboration of geographically dispersed teams and managing complex information, Arbortext Content Manager helps companies streamline their document and publishing processes.

These capabilities are maximized with the streamlined creation of documents using XML within Arbortext Editor to capture information and automate the assembly and publishing of documents to the internet, PDF, and other formats.

Windchill PDMLink Overview

Windchill PDMLink is a product data management system that provides a single source for product data for your company and facilitates the following critical processes that occur throughout the life of a product:

- Release management
- Change management
- Configuration management
- Document management

In addition, the Windchill PDMLink system:

- Allows global and controlled access to critical product data within your company, using a familiar application and navigation paradigm, namely, a Web browser.
- Provides extensive capabilities in the areas of data control, information management, and process control.
- Accommodates data from other critical applications.

- Windchill PDMLink contains a light viewer to allow MCAD and ECAD tools to be directly managed and exposed to non-CAD users.
- Windchill PDMLink integrates with ERP systems (for example, SAP) through an integration platform called Enterprise Systems Integration.
- Windchill PDMLink is tightly connected to PTC applications such as Windchill ProjectLink and Pro/ENGINEER Wildfire.


When you open Windchill PDMLink, the standard interface that appears enables you to take advantage of these capabilities. For more information on tabs that appear at the top of the screen, as well as other navigation information, see [Viewing and Organizing Information](#).

The following three areas, although separate from the standard interface, provide additional avenues for working with capabilities of Windchill PDMLink:

- Product Structure Explorer
- Options and Variants
- Windchill Desktop Integration

Product Structure Explorer

The Product Structure Explorer (PSE) is an application that runs within Windchill PDMLink that focuses on authoring product structures. It is optimized for design teams to create, update, redline and manage product structures. Dependent on preferences, each authoring action may either occur direct to the database with the user performing explicit check out and in operations, or cached in local client memory before the changes are saved either directly to the database in a single transaction or captured as an annotation.

To launch the PSE, navigate to any of the pages under the **Product** or **Library** tab and click the PSE icon  in the page title bar. This method will launch PSE with no part open. Alternatively, you can launch PSE from the **Actions** list on a part information page. This method will open PSE with the part loaded.

More information on PSE is available throughout the chapters of this guide. For information on specific procedures, access the online help in the PSE.

Note: Two options, specific to PSE, are important to consider before you begin working with the application. For more information, see [Product Structure Explorer Options](#).

Options and Variants

The options and variants capabilities help streamline the process of creating order-specific product structure descriptions for products. For typical configure-to-order (CTO) product development processes where the product development team may be responsible for creating an order-specific BOM for a customer order, the

options and variants capabilities improve the productivity of creating that BOM. A generic product platform may be defined from which customer-specific orders (variants) may be created.

The core building block of this process is the generic part. Windchill PDMLink introduces the concept of a *generic part* which is used to define optionality in a product structure, from which variant structures can then be produced. A generic part is created to capture part information that represents multiple choices or options and whose definition can vary based upon its usage. Therefore, a product structure that contains generic parts can be used to produce one or more variant product structures (customer orders).

The information below provides an overview of how generic parts may be used in the Windchill PDMLink system. For a definition of generic parts, see [Windchill PDMLink Objects](#).

The following is an overview of the information detailed below, describing the steps used when working with generic parts:

1. Create a generic part structure using [Product Structure Explorer](#) (PSE).
2. Use the **Constraints** and **Parameters** tabs in PSE to develop the logic for the generic parts. The parameters (driven by their constraints) are applied in the **Uses** Tab to specify optionality and also drive quantities.
3. Create a managed baseline for the entire generic part structure. For more information, see [Baselines](#).
4. Promote the top-most generic part (and use the managed baseline). For more information, see [Promotion Request Process](#).
5. Configure the released generic part structure using the Specification Editor to create variant specifications and variants parts. For more information, see [Variant Part and Variant Specification](#).

Tip: To launch the Specification Editor in PSE select **File > Options and Variants > Configure**, or in standard Windchill (outside of PSE), navigate to the information page of the generic part and select **Configure** from the actions list.

Most product structures, including those that contain generic parts, evolve over time to incorporate new or improved components. In order to manage the contents of the products structure when it is ready for review, a managed baseline is created to identify all of the objects (and their versions) in the product structure. For more information on versions, see [Modifying Objects](#). For more information on baselines, see [Baselines](#).

During the review and approval process, the top-most generic part (that is, the *configurable generic part*) is promoted to the next release level, and the managed

baseline is used to identify the child objects in the structure. For more information on promoting objects, see [Promotion Request Process](#).

A generic part is created to capture part information that represents multiple choices or options and whose definition can vary based upon its usage. Therefore, a product structure that contains generic parts can be used to produce one or more variant product structures. This means you select from the multiple choices and options available within the generic part to define the variant. From a configurable generic part, you create a variant using the Specification Editor. The Specification Editor is available by selecting **Configure** from an actions list in the standard Windchill PDMLink functionality or selecting **File > Options and Variants > Configure** in the Product Structure Explorer.

When creating a variant, the system automatically uses the selected configuration specification. For more information, see [Configuration Specifications](#). The current configuration specification may be appropriate during the product development process; however, it may not be when producing a variant from a released generic product structure because newer versions of components that have not yet been released could be included. As a result, you can select the default baseline when you specify the desired configuration specification for the configurable generic part to ensure that only approved component versions are used. For more information, see [Default Baseline](#).

Windchill Desktop Integration

Windchill Desktop Integration allows you to manage your Windchill documents from within Microsoft Word, Excel, and PowerPoint. This means that once a document is created in the Windchill system, you do not need to open Windchill PDMLink to complete document management tasks. After installing Windchill Desktop Integration, you connect to a Windchill server from the Microsoft application to complete document management functionality.

In order to use Windchill Desktop Integration, your File Download Mechanism preference must be set to use Windchill Desktop Integration. This preference, along with File Download Behavior, determines how file content is downloaded. Preferences are set in the **Preference Manager**. The download preferences are located under the **Attachments** heading. For information on setting preferences, see [Setting Up Your Environment](#).

When Windchill Desktop Integration is installed, the **Windchill** menu appears in the toolbar of Microsoft Word, Excel, or PowerPoint. The **Windchill** menu also appears when you right-click your mouse in Windows Explorer for a non-Microsoft Office document (such as a text file, PDF, or XML file) if right mouse click is enabled on the **General** configuration tab in your client. For more information, access the online help from the **Windchill Desktop Integration Configuration** window.

From the **Windchill** menu, you can create and edit Windchill documents as well as perform a limited selection of other Windchill document actions. For more

information on creating and editing Windchill documents using Windchill Desktop Integration, see [Creating Objects](#) and [Modifying Objects](#).

Note: The actions available depend upon whether or not you are connected to a Windchill server as well as the state of the document and your access permissions.

Windchill Desktop Integration maps Windchill document attributes, such as name and number, to Microsoft Office file properties. You can use these mappings to display Windchill document attributes in your Microsoft Office file as content so that when you open a file, it is updated with the latest Windchill attribute information. For more information, access the online help from the **Windchill** menu.

Important Tip for Mozilla Users: Windchill Desktop Integration downloads content by using a file called data.wcdti. The first time you download content, you may get a dialog asking what you want to do with the file. If you prefer not to get this dialog with future downloads of this file, you should select the option, **Open it with the default application**, and ensure that the check box labeled **Always show this dialog before handling files of this type** is not selected, before clicking the **OK** button.

Installing Windchill Desktop Integration

You can install Windchill Desktop Integration from the **Home** tab on the **Utilities** page. Select **Software Downloads**. After you accept the license agreement, the **Software Downloads** page appears. Under **Setup and Installation**, click **Windchill Desktop Integration 2.0 Installation**.

Note: For information about versions of Microsoft applications supported by Windchill Desktop Integration refer to the software matrix by using the following URL: <http://www.ptc.com/partners/hardware/current/support.htm>. If you cannot access the software matrix, see your administrator for this information.

After Windchill Desktop Integration is installed, a **Windchill** menu appears on the toolbar of the following Microsoft Office applications: Word, Excel, and PowerPoint.

Once Windchill Desktop Integration is installed, the **Windchill** menu can be enabled when you right-click on a document from Windows Explorer or your desktop.

To add the **Windchill** menu to your right-click menu, use the following procedure:

1. From a Microsoft Office application, select **Windchill > Configuration**.
2. Select the **Default** tab.
3. Select the following check box: **Display Windchill context menu for Windows Explorer right-mouse button click**.
4. Click **OK**.

To uninstall Windchill Desktop Integration, use the standard Microsoft Add/Remove Programs from the Control Panel.

Windchill PDMLink Objects

An *object* refers to a unit of information that can be stored and managed in the Windchill PDMLink system. The following sections describe the purpose of the different kinds of objects and the content maintained within them. Each kind of object is visually represented in the system by an icon. The status of this icon may change depending on modifications made to the object.

Note: Your site may define objects unique to your system, in addition to those listed here.

Object Masters

When a version-controlled object enters the system, the original, unchanging piece of the object is referred to as the object's *master*. A master is the common starting-point of the object that remains constant while the object experiences changes through associations and modifications. When objects are displayed in a structure through a configuration specification, a master may appear. The master of an object is represented by a black dot on the object icon. Because not every object is version controlled or viewed using a configuration specification, not every object in the Windchill PDMLink system has a master.

For more information, see [Associating and Relating Information](#) and [Modifying Objects](#).

Documents

A Windchill *document* is a content holder for files, URLs, or externally stored content integral to product development, such as specifications, requirements, assembly functions, technical publications, prototypes, and services documents.

CAD Documents

A *CAD document* is a revision controlled, life cycle-managed object containing a CAD model, which is a file or a set of files containing information in a CAD application format.

A CAD document is a content holder for CAD-derived files that can be related to parts in order to further describe the associated part. It can also be related to other CAD documents so that dependencies created and maintained by the authoring CAD system are represented.

Dynamic Documents

A *dynamic document* is a content holder for files authored in Arbortext Editor or other document-related files, such as graphics.

Dynamic documents have the following capabilities:







- They can store Arbortext Editor-generated (XML) files and related files, such as graphics.
- They can be related to other dynamic documents to allow representation of the complex dependencies that exist among the constituent parts of a structured document.
- They can have metadata and attributes.

For more information on the integration of Arbortext Editor and Windchill, see *Getting Started Authoring Arbortext Documents*.

Parts

A *part* is a physical component or assembly used in a product structure. A *product structure* is a hierarchical representation of all assemblies and component parts necessary to assemble an end item.

Parts have different attributes displayed by different icons as shown in the table below. For information on part master, see [Object Masters](#). Explanations of the other icons are described in the following section.

Icon	Description
	Part
	Part Master
	End Item
	Generic Part
	Configuration
	Instance

End Items

An *end item* is the top-level assembly that represents a unit of product functionality that is sold, assembled, and delivered to the customer. Additional end items may be created within a product in order to support the concept of product lines and modular products.

Generic Parts

A *generic part* is a part that contains variability based on a set of parameters, constraints, and programmatic logic. This variability allows you to select from

one or more options for components of a product structure. This is useful for cases where you make multiple selections for a single product. For example, when you select a car, you choose a color, an options package, an engine type, and other features. If the top-level assembly of the structure is generic, it is referred to as a *configurable generic part*.

Each selection you make in the final product is represented by a *parameter*. The dependencies that determine when a certain parameter can be selected are *constraints*. For instance, a person buying a car may be able to select only a certain options package if they also select a specific engine type. A constraint can be thought of as a dependency between two or more choices.

Additionally, when creating generic parts, you can define logical expressions that restrict the values for a given parameter or define relationships between one or more parameters.

A variant structure, or product variation, is a structure of one or more parts that are created from a generic part structure by selecting those choices or options necessary to completely define the generic part structure. For example, a generic part for a round table top with an unspecified diameter could produce a number of variant table tops with diameters of 30", 32", 36", or 48."

While generic parts can be created both in the Product Structure Explorer (PSE) and the standard Windchill functionality, parameters and constraints are created only in the PSE. For more information, see [Product Structure Explorer](#) and [Parts](#).

Variant Part and Variant Specification

A *variant part* is a part that is created during the variant generation process. During the [Options and Variants](#) process of creating a product variant for a customer order, a variant part is created by the system from the values entered. A variant structure, or product variation is created during the variant generation process of creating an order for a product.

The collection of options specified for a particular generic part structure in preparation for creating a variant is the *variant specification*. It defines the characteristics of the variant that should be created from the generic part structure. During the variant generation process, the Windchill system automatically searches for existing parts that satisfy the specification and includes them in the structure for the variant part.

Configurations

A *configuration* identifies the versions of parts used to build the end item part as it is provided to customers. For example, during the course of the design of a car, you can create a configuration that is used to manufacture cars for a certain period of time. If design continues after that point, a newer configuration with changes can be created later and used for subsequent manufacturing.

The configuration allows you to track the versions of parts that are used to manufacture a specific line of end item parts for record keeping and ongoing maintenance of that end item part in the field.

You create a configuration in the standard application only, not in the [Product Structure Explorer](#). To do so, select the end item part and expand the structure according to a configuration specification, such as Latest Released. For more information, see [Associating and Relating Information](#).

The result of the expansion shows all of the most recently created part versions in the Released state. The system then requests a name for the configuration and stores a baseline (or list) of all the selected parts with that name. You can use the configuration as the approved bill of materials for production.

Note: When the structure of a configuration is expanded, if it reaches a child end item part, the expansion halts and displays only the end item part master.

Instances

An *instance* identifies, by serial number, a unique, manufactured instance of an end item part, built according to a specific configuration. It allows you to identify exactly which part is used in that instance. Once the end item is built, the instance becomes a database record that can be used to indicate changes to that particular copy of the end item part while it is in service. If the instance is changed (for example, one part is replaced by another), the replacement part is recorded in the instance.

Instances can use other instances. For example, an automobile end item can use a separate engine end item. Both the automobile and engine may be identified by a serial number and result in the creation of instances. When the top-level instance (the automobile) is built, the instances (that is, the serial numbers) of lower-level end items used in it (such as the engine) are recorded.

To record, in this example, which serial numbered engine goes into which serial numbered car, you allocate that instance of the engine to a specific instance of the car. Allocation usually starts at the bottom of a multi-level assembly. The top-level instance (in this case, the car) is not considered completely defined until all of the serial numbered parts and other instances that comprise it are associated with the instance through allocation.

An important aspect of instances is their incorporation date. This date is established when a new component or assembly is built, a change is incorporated (that is, retrofit) in the configuration of an existing instance, or an instance is replaced (for example, an entire engine). The incorporation date indicates when a new configuration associated with an instance takes effect.

For example, if a change such as a new version of a part is made in the structure of an instance, a new configuration would be created containing the new version. The instance would then be revised and referenced to the new configuration. That is, the new part would replace the old part, and the incorporation date would

indicate when this happened. Thus, the instance and incorporation date allow you to track exactly which parts were in the instance at any given time.

Incorporation dates always start at the bottom of a multi-level assembly. For example, the lower-level engine end item would have to be built and incorporated before it could be put in the automobile end item.

Note: You can create configurations in the standard Windchill application only, not in [Product Structure Explorer](#).

Notes

A *note* allows you to include additional design information for a part in an assembly. For example, a note allows you to communicate production information to the people in manufacturing. The text of a note displays directly in a structure, so you do not have to download a file in order to see the information the note is created to portray. For more information on notes, see [Associating and Relating Information](#).

Change Objects

The objects that create and track changes for the other objects in your Windchill PDMLink system are collectively called *change objects*. For information on problem reports, change requests, and change notices, see [Change Management](#).

2

Setting Up Your Environment

Before you work with Windchill PDMLink, it is important to set up your work environment. Begin by following the procedures provided in the Before You Begin section to assure that the application can run successfully on your machine. You may additionally be able to change your password, edit your preferences, and change the way your tables and table views appear throughout Windchill PDMLink. It is also important to understand the constraints that may alter how certain attributes display across Windchill PDMLink.

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Before You Begin

Before you begin using Windchill PDMLink, complete the setup described in the following sections to successfully run the application on your local machine:

Web Browser and Java Plug-In Version

Ensure that you are using a Web browser and Java plug-in version that is supported by Windchill PDMLink. Supported browsers and plug-ins are listed in the PTC software matrix.

The software matrix lists the combinations of platforms, operating systems, and third-party products that are certified for use with this release on Windows and UNIX operating systems.

To obtain a copy of the software matrix, use the following URL.

<http://www.ptc.com/partners/hardware/current/support.htm>

Product and version matrix information is updated periodically to adjust to environment changes. If you cannot access the software matrix, see your administrator for this information.

Tip: If you have enabled Java Web Start using the Preference Manager, and you are running Windchill PDMLink or Windchill MPMLink on a UNIX platform, you may be prompted to select a helper application when launching an explorer. Select **javaws**.

Browser Locale Settings

Ensure that your browser locale is set to a language supported by Windchill:

- Chinese Simplified (zh-CN)
- Chinese Traditional (zh-TW)
- English (en_US, en_GB)
- French (fr)
- German (de)
- Italian (it)
- Japanese (ja)
- Korean (ko)
- Spanish (es)

To set your browser locale, use the instructions for your browser given below, or see the online help available from your browser.

Internet Explorer and Firefox

1. Select **Tools > Internet Options**.
2. On the **General** tab, click **Language**.
3. On the **Language Preference** screen, click **Add**.
4. Select a supported language from the list, and click **OK**.

Mozilla

1. Select **Edit > Preferences**.
2. Expand the **Navigator** category and select **Languages**.
3. Click **Add** to add a language.

ActiveX Settings

If you are using Internet Explorer, ensure that the ActiveX settings for your browser are enabled to allow viewing of images, such as object thumbnails used in visualization.

Use the following steps to ensure that your ActiveX settings are properly enabled:

1. Select **Tools > Internet Options**.
2. On the **Security** tab, in the **Security level for this zone** section, click **Custom Level**.
3. Make sure that the following settings are set to **Enable** or **Prompt**:
 - Download signed ActiveX controls
 - Run ActiveX controls and plug-ins
4. Click **OK** to accept the settings and close the **Security Setting** window.
5. Click **OK** to close the **Internet Options** window.

For additional information, contact your system administrator.

Pop-Up Blocker Interference

Many web browsers and third-party applications offer pop-up blocker capabilities to prevent unwanted pop-ups from being opened on your local machine. This can interfere with some Windchill operations that automatically open new windows, preventing you from completing certain functions, such as downloading object content. For example, if you receive an error when viewing the content file of a Windchill document, the procedures in this section may fix that issue.

Pop-Up Blocker Interference in Firefox

For Firefox, you can avoid pop-up blocker interference by designating your Windchill server domain as an allowed site. For example, if your Windchill home page URL begins with `http://www.mycompany.com/Windchill`, you would add "mycompany.com" to the list of allowed sites using the following procedure:

1. Select **Options** from the **Tools** menu.
2. Click the **Content** icon. From the window, click the **Exceptions** button next to the **Block pop-up windows** check box.
3. The **Allowed Sites - Popups** window appears.
4. In the **Address of web site** field, enter "mycompany.com".
5. Click **Add**, then click **OK**.

For purposes of pop-up blocking, Firefox treats port numbers as part of the host name. If your Windchill server is listening on a non-default port number and you are using Firefox as your web browser, you must add the host name, including the port number, to your list of allowed sites. This means that if your Windchill home page URL begins with `http://mycompany.com:8080/Windchill` or `https://mycompany.com:8080/Windchill`, you would add "mycompany.com:8080" to the list of allowed sites.

Pop-Up Blocker Interference in Internet Explorer

For Internet Explorer 7.0, pop-up interference sometimes occurs if you have the Windchill server in your trusted list but not in the local intranet zone. To avoid interference, you must add the Windchill server to the local intranet zone. This will enable the automatic prompting for file downloads preference in Internet Explorer and disable the pop-up blocker.

To enable this preference, use the following procedure:

1. From the Internet Explorer **Tools** menu, select **Internet Options**.
2. Navigate to the **Security** tab and click the **Local intranet** icon.
3. Click the **Sites** button.
The **Local intranet** window appears.
4. Click the **Advanced** button.
5. In the **Add this Web site to the zone** field, enter your Windchill server name and click **Add**.
6. Click **OK**.

The Windchill server has now been added to your local intranet zone

Windchill Visualization Services

Windchill Visualization Services provide you with the ability to view, annotate, and collaborate on neutral format data stored in Windchill PDMLink. This embedded visualization tool and its necessary plug-ins are included in Windchill PDMLink to view 3D CAD data, drawings, and images, and is automatically downloaded when required. To view or annotate some documents, the appropriate viewing option must be purchased and installed.

If your site purchased Windchill ProductView Standard Edition in addition to Windchill PDMLink, you have access to advanced features such as interference checking, animation tools, sectioning tools, constraining, compare tools, and real-time, peer-to-peer collaboration.

To download and install Windchill ProductView Standard Edition on your local machine, use the following procedure:

1. From the **Home** tab, navigate to the **Utilities** page, and click the **Software Downloads** link.

If prompted, read the license agreement, and click **Accept**.

2. On the **Software Downloads** page, click the **ProductView Installation** link in the **Setup and Installation** section.

The **Download ProductView** window opens.

3. Follow the provided instructions to open the Windchill ProductView setup program and complete the installation.
4. Restart your browser.

Windchill ProductView is ready to use. You can now download additional Windchill ProductView executables for special use.

Additional Downloads

The following additional downloads may be available from the **Download ProductView** window.

- Pview_help_<language>.exe: Installs the online help for Windchill ProductView Standard Edition. This download is optional, but recommended.

Note: The English version of the ProductView Standard Edition online help is automatically installed along with the ProductView client software. The **Additional Downloads** section contains installers for the non-English versions of the help, including Chinese, French, German, Italian, Japanese, Korean, and Spanish.

- Pview_option_import_standard.exe: Installs the ProductView Client Import Filters, which allow you to open additional file formats from other applications, including IGES, STL, GAF/GBF, VRML, Pro/ENGINEER, and Microstation DGN files. This download is optional.

- Pview_option_simulationviewer.exe: Installs the ProductView Simulation Viewing Options, which are required to view DIVISION MockUp files. This download is optional and is available only for Windows systems.
- acrobat60_<language>.exe: Provides Adobe Acrobat 6.0 functionality for use with the Document Viewing Option. Available only if the Document Viewing Option has been purchased and installed at your site. If you already have Adobe Acrobat 6.0 installed on your machine, you do not need this download to use the document viewing functionality.

Note: There are multiple versions of this executable available, supporting different languages. For example, acrobat60_efg.exe supports English, French, and German languages. Your administrator installs the version appropriate for your site.

- Pview_option_PDF.exe: Installs the Document Viewing Option, which provides the ability to annotate PDF files.
- Pview_option_collective_doc.exe: Installs the ProductView Collective Document Viewing Option, which provides the ability to view various document formats in ProductView Standard Edition.


Setting Your Preferred Replica Site

You can specify a site as a preferred source for your downloads. However, the site must hold the content. If the specified site does not hold the content, the content is downloaded from the master site.

You can specify a site as a preferred destination for content uploads. If this site is a replica site, the content is uploaded (cached) to that site. Otherwise, the content is uploaded to the master site, and, depending on the settings, is saved in a database or a cache vault.

To set a site as the preferred source of downloads or destination of uploads, use the following procedure:

1. Navigate to the **Preference Manager** by selecting the **Preference Manager** link on the **Utilities** page of the **Home** tab or by clicking the **Preferences** link on the **Advanced Search** page.
2. Find the **Choose Preferred Content Cache Site** preference, which is located in the **Vaulting and Replication** category.

Click the set preference icon .

3. Select a site name from the **Value** drop-down list, and click **OK**.

Note: If you click the **Revert to Default** button, the preferred site will be set to *Windchill Master Site*.

Product Structure Explorer Options

Product Structure Explorer (PSE) provides advanced capabilities for working with parts in Windchill PDMLink. PSE operates differently based on preferences you select. For example, it can be launched either using Java Web Start or as an applet. In addition, it can launch in one of two modes. It is also important that suitable memory be allocated to enable PSE to run efficiently. These options are described below.

Java Web Start

You have two different options for the framework used by the Product Structure Explorer. In addition to the Java plug-ins (or applets) used previously, you have the additional option to use Java Web Start.

Java Web Start allows application software for the Java platform to be started directly from a Web browser. The following list describes the advantages of using Java Web Start:

- Java Web Start has a dedicated memory pool. Contrary to applets, Java Web Start applications do not share memory with the Web browser. This provides a significant advantage when using Internet Explorer. Under this Web browser, applets are limited in the amount of memory they can manage. This limitation does not exist with Java Web Start.
- Java Web Start has the potential to pass additional arguments to the client Java VM (Virtual Machine) in order to control the amount of available memory as well as parameters. For a complete list of parameters supported by Java Web Start, refers to Sun's Java Web Start documentation.

The following list describes the disadvantages of using Java Web Start:

- Since Java Web Start and the Web browser are two distinct processes, you must reauthenticate to Windchill the first time you launch PSE with Java Web Start. This action is required to ensure the security of your credentials.
- Web pages launched from the Java Web Start applications must go through an extra redirect page. This action ensures that all Windchill Web pages are under the same session.

Given these advantages and disadvantages, determining whether or not to use Java Web Start depends on your needs as well as your computing environment. If you are using Microsoft Internet Explorer as your Web browser, Java Web Start is beneficial compared to the inherit memory limitation of applets inside this Web browser. No matter the framework you choose, no perceivable difference in the software exists.

The option to select Java Web Start is available in the preference manager. For more information see, the section below, [Preferences](#).

Memory Allocation

When working with large structures in PSE, you may need to increase the memory allocated to the Java Runtime.

To increase the memory when running PSE as an applet, use the following procedure:

1. Open the Java Plug-in Control Panel.
 - On Windows systems, select **Start > Settings > Control Panel > Java Plug-in**.
 - On UNIX systems, navigate to the Java Plug-in Control Panel using your Web browser. The URL will point to ControlPanel.html inside the Java installation directory:
file:///<path_to_java_installation>/ControlPanel.html
2. Click the **Java** tab.
3. In the **Java Runtime Parameters** field, type **-Xmx256m**.

To change the memory when running PSE using Java Web Start, edit the Java Runtime Parameters for Java Web Start preference. In the **Value** field, enter a new memory setting. To navigate to the preferences, see the following section.

Preferences

A number of preferences are available for PSE. To view or modify these preferences, use the following procedure:

1. In standard Windchill (not PSE), select the **Utilities** link below any tab.
2. Select **Preference Manager**.
3. Expand the **PSE** preference row.

In addition to the preferences described above, another preference you may want to modify before you begin using Product Structure Explorer is the mode in which PSE will launch. To edit this preference, use the preceding procedure, and select **Launch Mode**. Select draft mode to work with a product structure without affecting the objects currently in the database. Select edit mode to have all changes made to the product structure updated directly to the database.

Password Management

If an **Actions** link is present on your user profile page, you can select the **Edit Password** action to change your own password. If this link does not appear, contact your administrator to find out how to change your password.

Preferences



The Preference Manager allows you to view and set preferences, such as display and search options. You can access the Preference Manager by clicking **Preference Manager** on the **Utilities** page of the **Home** tab. The **Preference Manager** appears.

Preferences in the **Preference Manager** table are grouped by category and subcategory according to the type of functionality they impact.

Categories of particular interest may include:

- Attachments
- Create and Edit
- Delete
- Display
- Search
- Tables
- Visualization

Your preferences may differ, depending on the settings at your site.

The **Preference Manager** table provides the display name, a set preference icon , the current value, and a description of the preference. If you want to change a preference, click the set preference icon . The **Set Preference** window displays, providing a more detailed description and the ability to change the preference.

Tip: Always click **OK** to set the preference information, instead of pressing ENTER on your keyboard.

Table Views and Filters


Information about the data you are working with is commonly presented in tables. Objects are listed in rows, and the information about those objects are reflected in columns.

For example, in the **Assignments** table on the **Home** tab, your assignments are listed in rows, and information about each assignment, such as the date it is due and the date it was assigned, is listed in the columns to the right of each assignment.

The number, content, and order of the rows and columns in a given table can strongly help or hinder your ability to work with large data sets. Therefore, the system not only provides a set of possible views for most tables, but it also allows you to tailor your view to include only the information that will allow you to best meet your objectives.

When working with your assignments, for example, you can choose one of the available views in the **Current View** drop-down menu, such as your **Closed** assignments or your **Accepted** assignments. If none of the views available in this menu suit your needs, you can select **Customize** to create your own view, including only the information and objects that you want to see.

For more information on selecting a view or creating your own view, see the online help available from the **Customize View List** window.

Tip: In some tables, the **Current View** drop-down menu does not appear. For these tables, you can still create your own view by clicking the customize icon  in the upper-right corner of the table.

Attribute Constraints

Your administrator may have set constraints on certain attributes that would typically display in the Windchill PDMLink system. If this is the case, certain attributes may not appear when you are creating, editing, or viewing objects. In other cases, the same attributes may appear with a notation that they are <Hidden>. Certain attributes may also appear as read only.

The constraints set on the attribute are system-wide, so the behavior will be the same regardless of the context in which you are working.

For more information about constraints, see your administrator.

3

Viewing and Organizing Information

The manner in which information is organized in Windchill PDMLink affects who can view and how information is viewed in the system. This chapter explains how you navigate the system in order to view information in different ways. It also provides information on changing where information is located using the clipboard and other actions.

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Contexts and Teams

Contexts are containers for the information stored in Windchill PDMLink. Different types of contexts are available based on the Windchill solutions you have installed. Products and libraries are available for Windchill PDMLink, Windchill Pro/INTRALINK, and Arbortext Content Manager while projects and programs are available when Windchill ProjectLink is installed.

A *product* can be thought of as a collection of information that defines what is built and sold by your company. The product provides the context in which you collaborate to create this information, where only those with defined roles have access to the information.

A *library* can be thought of as a place for storing and providing access to business information such as documents and other objects that are not related to a single product. Your administrator creates the different products and libraries at your site, each with a unique name and specific team members identified to create, associate, and modify objects within the product or library context.

Someone with administrative privileges creates as many of each context as your organization requires to organize the information you use.

When the context is created, the team of people allowed to access the information in the context is selected. Some team members will only be able to view the information while others can modify it. This distinction is based on their role.

Roles

Team members are assigned roles within the context. For example, a team has guest and member roles:


- *Guests* to the context have the ability to view but not change information in the context.
- *Members* have access to all actions in the context.

A role relates members in the context to information and activities managed in that context. Roles help to group people who have similar duties in the context in a way that makes sense for the team. When people are invited to become a member of an application context, the context manager must assign at least one role, such as Designer or Reviewer, to each person. Members in a context can be assigned to more than one role. To view the members and their roles, navigate to the **Members** table of the **Team** page under the context tab.

With each role that is defined, a corresponding system group of the same name is automatically created. There are system groups that are used with context teams, as well as user-defined groups that can be created and maintained in the organization and site contexts, or created and maintained through an enterprise directory server.

Visibility

Certain areas within a context, or even an entire context, can be hidden from a user's view using one of the following methods:

- **Profiles:** Profiles define which parts of Windchill PDMLink (for example, actions, tabs, and attributes) are visible to a user, group of users, or the users within an organization. Someone with administrative privileges can create profiles using the **Profiles** link under the **Organization** tab.
- **Configuring actions for roles:** Clicking the configure actions icon  on the **Members** table of the **Team** page for the context displays a window where you can select areas within Windchill PDMLink to hide from team members based on their role. So while profiles hide information for users, groups, and organizations throughout the Windchill PDMLink system, the configure action hides information by role and only in the context you select.
- **Private contexts:** Only context team members are granted access to a context by default, but access groups with policies that extend access beyond the immediate context team can be defined by a user with administrative privileges. A context which allows only team members to access information is known as a private context. For example, if information is contained in a private context, that information does not appear in search queries run by users who are not team members of the context; however, if a context is not private, the information contained in the context may be returned in search queries run by non-team members.

Note: The option to define a context as private by allowing only team members to access it is not available if the context creator selected a shared team.

Security Management

The security management functionality provides a mechanism to view and manipulate access control permissions on individual objects and the folders in which the objects reside. These access control permissions determine the user, group, or organization enabled to view and edit the objects. To access this capability, select **Manage Security** from the actions lists displayed throughout Windchill PDMLink.

Note: Your administrator controls the set of possible permissions you can see and change.

Tabs and Pages

Windchill organizes information using tabs and pages. Major tabs appear along the top of the screen, dividing the interface into areas. Among other things, tabs allow you to work in different Windchill contexts.

The minor tabs that are listed below each major tab are the pages available for that tab. Use these pages to navigate among the information for that tab. For example, if you are working in the **Home** tab, you can view tables on the **Overview** page, or you can navigate to other pages to view your **Assignments** or your **Subscriptions**. The pages available differ depending on which tab you are working in.

Home Tab

The **Home** tab contains information specific to you. Here, you can view your assignments, objects that you have checked out, your meetings, your subscriptions, and more.

This tab is also helpful in that it allows you to access objects and contexts that you have worked with recently without having to navigate back to those objects through the Windchill system. These objects will appear in your **Updates** table, which is accessible from both the **Overview** page and the **Updates** page.

Context Tabs


Tabs that reflect different Windchill contexts are also available. However, the tabs that appear depend on which Windchill solutions you have installed. If you have Windchill PDMLink installed, the **Product** and **Library** tabs will appear. If you have Windchill ProjectLink installed, the **Project** and **Program** tabs will appear.

Tip: Windchill has *stickiness* capabilities that allow you to navigate among tabs and menus, and then quickly return to the area in which you were previously working.


For example, if the last time you viewed information under the **Product** tab, you viewed the **Folders** page of Product A, that page appears the next time you click the **Product** tab. To view information for a different product, select a new product from the **Products** page.

Change Tab

The **Change** tab allows you to view all of the change information for products and libraries of which you are a team member. Pages displaying **Problem Reports**, **Change Requests**, **Change Notices**, **Change Monitor**, and **Reports** appear

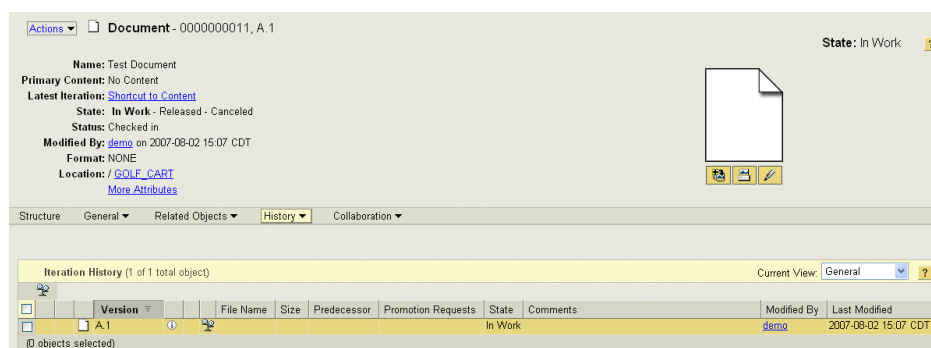
under this tab. You can click the view information icon  to open the information page for each object listed. The **Change Monitor** page tracks changes occurring in the system or at the product or library level.

Information Pages

When viewing multiple objects in Windchill, you may want to see more specific information about an object. To do so, click the view information icon  for that

object version or select **View Information** from an actions list. The information page appears.

The information page includes specific attributes about the object, a menu that includes all of the actions available for that object, and tables that allow you to view additional information about the object, such as its history.



Note: Information pages contain information about objects only. To view information about contexts, see the **Details** page. For more information, see [Contexts and Teams](#).

Navigating an Information Page

There are four main parts to most information pages:

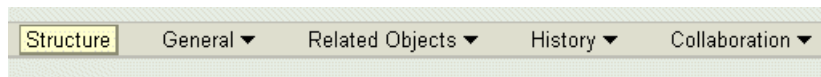
- The **Actions** menu, located beside the object name, provides access to many additional operations related to the specific object. The options available in the **Actions** menu vary depending on what type of object you are viewing, the object's state, and your permissions.
- Beneath the object name, a subset of object attributes appears. You may be able to view additional attributes by clicking the **More Attributes** link, if available. When you do this, an additional table appears in the bottom portion of the information page, displaying every attribute that is available for this object.
- Depending on the type of object that you are viewing and on whether or not your site has the visualization tool installed, you may also be able to view a thumbnail image of the object. If available, this representation appears to the right of the object attributes.
- The navigation menus, located on the lower portion of the information page, display tables of additional information about the object. The entries in many of these tables are links to additional data, allowing you to continue navigating to additional information. For more information about using information tables, see the section below.

Note: If an object has three or fewer additional information tables, the navigation menu will not appear on the information page. Instead, the tables will appear by default at the bottom of the page.

Note: When the structure table is displayed in the bottom portion of the page, drop-down lists above the table allow you to change the configuration specification used to display the structure and to generate reports on the structure. For more information, see [Document Structure](#) or [Part Structure](#).

Using Information Tables

A list of navigation menus appears on the lower half of most object information pages.



Clicking one of the navigation menus displays a list of additional information tables for the object. The navigation menu determines the types of information tables that display.

The following navigation menus may appear, depending on the object you are viewing:

Menu	Description of Related Tables
Structure	Although this is located with the navigation menus, Structure is simply a link to the structure table for objects. It shows a hierarchical view of the object's children. Drop-down lists above the table allow you to change the configuration specification used to display the structure and to generate reports on the structure.
General	The General menu includes tables that reflect common information about the object, such as its attributes and the higher-level objects that use it.
Related Objects	The tables under the Related Objects menu describe objects that have some kind of relationship with the given object. For example, you can view Windchill documents that are related in some way to the given object.
History	The tables under the History menu reflect the ways in which the object has changed. For example, you can view previous revisions of the object or see if it has been moved or renamed.

Menu	Description of Related Tables
Collaboration	The tables in this menu allow you to collaborate with other users about the object. For example, the Discussions table and the Subscriptions table are available here.

There may be actions menus embedded within these information tables or from the table toolbars. Most of these tables will also allow you to access the information pages of other objects.

Note: The actions listed in the **Actions** menu at the top of the information page apply only to the object you are viewing. They do not apply to the objects listed in the related information tables.

Workspaces

A *workspace* can be thought of as a personal space, that is, a named holding area for objects you are managing between Windchill PDMLink and an authoring application such as Pro/ENGINEER Wildfire or Arbortext Editor.

The workspace is used for placing objects like CAD documents and dynamic documents into the Windchill system. The following sections provide a high-level overview of workspaces. For CAD users, a more in depth explanation of workspaces is available in *Using Pro/ENGINEER Wildfire with Windchill*.

Workspaces are not enabled by default because not all users interact with an authoring application. To enable workspaces, navigate to the **Utilities** page displayed under many of the tabs. Then click **Preference Manager**, and under the **Display** heading select the **Workspaces** preference where you can enable workspaces. Once enabled, the **Workspaces** link appears under many of the tabs, such as the **Home** tab.

You can define and maintain as many workspaces as you require. This ability is useful if you are working on several tasks at the same time. It allows you to create a workspace for each task and segregate your data by affiliation.

Note: Only one version of an object can be placed in a workspace at a time. As a result, it is a best practice to use the Latest configuration specification when editing objects. For more information, see [Configuration Specifications](#).

In addition to the check-in and check-out options available in the standard Windchill PDMLink, the workspace has upload, download, and update options. For more information on checkout and checkin, see [Check Out and Check In](#).

Upload

An upload performs the following functions:

- Transfers new and modified files from authoring application to Windchill PDMLink.
- Creates new objects in your personal workspace for the new files from the authoring application.

Tip: If Arbortext Editor is your authoring application, although an upload can be initiated from the workspace, only an upload initiated from Arbortext Editor bursts a dynamic document.

- Updates the checked-out version of an object in the workspace with the latest modifications made in the authoring application.

Note: The **Upload** action does not update the folders in the standard Windchill PDMLink environment with changes made in the workspace. Therefore, other Windchill PDMLink users do not have access to uploaded objects. An uploaded object must be checked in before it can be viewed by others.

Download

Download (also referred to as adding items to the workspace) creates a copy of the content of an object from Windchill PDMLink in your active workspace. If an object is checked out by another user, you can use the download action to add the object to your workspace for reference purposes only. You might consider this analogous to using the **View** action.

Because downloaded-only objects have not been locked, as with the check-out action, you should not modify them, as you typically cannot check in changes made to objects that have not been checked out.

Update

In most cases, you will be working with the latest copies of objects from Windchill PDMLink. However, in some cases you can be working with objects that are downloaded to your workspace and are not checked out. If changes occur to the object in Windchill PDMLink, the object in your workspace becomes out-of-date with respect to your workspace configuration specification. When this occurs, you must refresh the object data in your workspace with the data from Windchill PDMLink. This process is called an *update*.

Another example of using update is when you have defined a more specific configuration specification for your workspace and then use the **Update** action to ensure that the data in your workspace conforms with the new workspace configuration specification.

The **Update** action is also useful if you make undesired changes to checked-out objects and want to revert to the previous content.

Tip: If Arbortext Editor is your authoring application, you can select **Update Document** from the Arbortext Editor **File** menu to imitate this action.

Servers

Authoring applications, such as Arbortext Editor or Pro/ENGINEER Wildfire are designed to use multiple data servers. Typically you work with one server that becomes the default location for most storage and retrieval actions. The integration of authoring applications and PTC solutions allows you to identify this server as a primary server and provides you with enhanced access. The advantages of having a primary server are:

- Direct save of authoring application files to the primary server's active workspace.
- When retrieving an object, the authoring application looks in the active workspace on the primary server to retrieve first.
- When saving an object, the authoring application looks in the active workspace on the primary server first.
- For Arbortext Editor users, from the Arbortext **Object** menu, you have direct access to **Check Out**, **Check In**, and **Undo Checkout** actions. Upload and update functions are available in the **File** menu.

Once a primary server is registered, any other server that you register is considered a secondary server. You may, however, redesignate a different server to be the primary server. For more information on registering servers, see *Using Pro/ENGINEER Wildfire with Windchill*.

Visualization

With the Windchill visualization tool, ProductView, you can view data from a variety of sources without requiring access to the application that created the data. For example, you can collaborate dynamically with others regarding design or document content without accessing the application used to draw or author it.

With this capability, you can analyze the product design, annotate files to indicate review comments, obtain information about parts of a product structure.

The default viewer for Windchill solutions is ProductView Lite Edition, which is described in this chapter. ProductView Standard Edition, an additional option your site may have installed, provides expanded visualization functionality beyond the capabilities of ProductView Lite Edition. For more information, see your administrator.

For information on downloading and installing Windchill ProductView, see [Setting Up Your Environment](#).

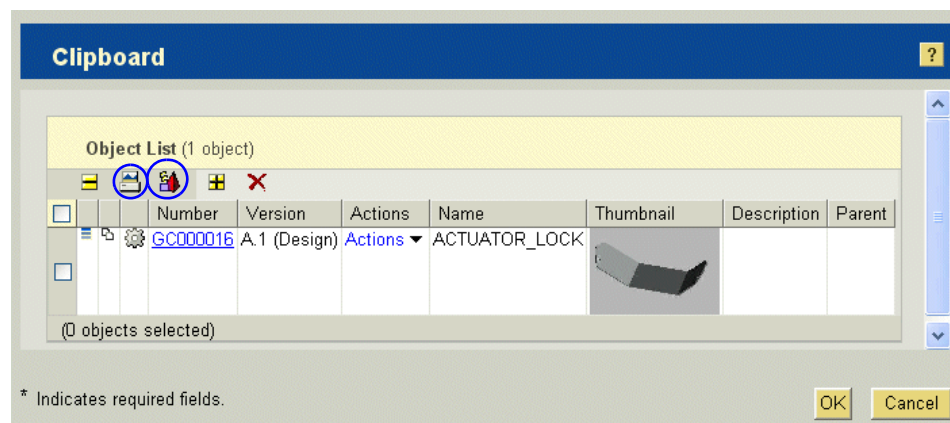
Accessing Visualization

In Windchill PDMLink, there are several ways to access the visualization capabilities of ProductView:

- **Thumbnail images:** Throughout Windchill PDMLink, thumbnail images display for objects stored in the system. With 3D data, you can spin the images to change the viewpoint. To visualize the data in more detail, click the thumbnail to launch ProductView.
- **Object information page:** This page displays a 3D thumbnail of the object. Additionally, below the thumbnail image, you can click the representation icon, identified in screen below, in order to display the **Representations** table. In the **Representations** table, you can complete additional actions to visualize that object. For more information, access the online help from the table.



- **Actions list:** Select **Open in ProductView** from the actions lists that appear throughout Windchill PDMLink.
- **Clipboard window:** While the Windchill Clipboard is used to cut, copy, and paste objects, it can also be used to launch and print to ProductView using the icons circled in the window below:



Note: To view Windchill documents in ProductView, you must purchase and install the Document Collaboration option. To view ECAD printed circuit boards and schematics in ProductView, you must purchase and install the ECAD Viewing option.

Publishing Visualization Data to Windchill

Most viewable data comes from managed CAD data; however, you can add visualization data, such as prepublished viewables, drawings, or EDZ files, directly into Windchill from your hard disk using the **Representations** table.

When you submit a representation to be created in Windchill, the **Publish Monitor** window displays the status of your published data in Windchill.

In order to publish, view, or annotate Windchill documents, you must have the Document Collaboration Services option installed on the server. If you have this option installed, you can upload a Microsoft Word document or Microsoft Excel spreadsheet and automatically publish this file to PDF.

Setting Preferences

You can set preferences for visualizing data in Windchill. To do this, click the **Utilities** link on the **Home** tab. From the **Utilities** page, you can click the **Preferences** link to view and set preferences. For example, you can choose to display thumbnail images on information pages for viewable files. For more information on preferences, see [Preferences](#).

Document Content

To view the content of a Windchill document, use one of the following methods depending on the type of content:

- File Content

You can view a file attachment by clicking the format icon displayed on some tables, such as the **Folder Contents**, **Attachments**, and **Iteration History** tables, or next to the primary content on a document information page.


You can also view the primary file content attached to a document by clicking the **Download** or **Check Out and Download** actions. Use **Download** to view the file content. Use **Check Out and Download** if you want to prevent others from modifying the document while you are making changes to the file.

You can view multiple file attachments from the **Attachments** table. Select the check boxes for all attachments you want to view and then click the download icon in the table toolbar.


Tip: Preferences such as File Download Mechanism and File Download Behavior determine how document file content is downloaded. Additional preferences control the name and length of the filename when downloading content from a document created from a template. Preferences are set in the

Preference Manager. The download preferences are located under the **Attachments** heading. For information on setting preferences, see [Preferences](#).

- URL Content

You can view URL content attached to a document by using the **Open URL** action or by clicking the URL format icon  displayed on some tables, such as the **Folder Contents**, **Attachments**, and **Iteration History** tables, or next to the primary content on a document information page. This launches the URL in a browser for viewing.

- Externally-Stored Content

While externally stored content cannot be accessed through Windchill, you can click the information icon  for the attachment to view an information page which specifies where the content is actually stored. For example, in a file cabinet or storage area.

For information on attaching content to a document, see [Attachments](#).

Cut, Copy, and Paste

A simple way to move an object is to use the **Cut**, **Copy**, and **Paste** actions. Both **Cut** and **Copy** move selected objects to the Windchill clipboard; the **Paste** operation determines whether the object will be duplicated, moved, shared, or checked out, based on the icon you select.

For example, when you **Cut** one or more selected objects, it is moved from its current location to the clipboard. In order to complete the move, you can then **Paste** the object to a selected folder location. You can also use the **Copy** and **Paste** actions to create a new copy of a selected object and paste it in the selected location.

Tip: If you are working in Product Structure Explorer, the **Cut**, **Copy**, and **Paste** actions are applicable within the explorer only. To work with objects outside of the Product Structure Explorer, use the actions **Copy to Windchill Clipboard** and **Copy from Windchill Clipboard** available from the **Edit** menu.

When your site has installed multiple Windchill solutions on a server, you can use Windchill's clipboard mechanism to share or check out data from a product or library in your PDM system to a project (or from one project to another). For more information, see [Windchill Clipboard](#).

Move

The **Move** action allows you to organize objects by moving them from one context to another. You can move objects between products and libraries or between folders in a single context. However, objects can only be moved within

the organization in which they were created. Additionally, objects must be checked in before you can move them.

Note: To move an object from one folder to another in the same context or in two different contexts, you must have the appropriate permissions in both the source and destination folders and on the objects in those folders.

Move is similar to cut and paste. However, while cut and paste is useful for moving one version of an object, the **Move** action allows you to move all versions of CAD documents, parts, and documents.

In addition to moving all of the versions of an object, you can also gather other related objects to include in the **Move** action. Related objects maintain their associations with the object when it is moved.

Moving Versions

When you move all of the versions of an object, the versioning scheme for that object will not change. However, it is not possible to move objects between contexts with different versioning schemes.

You cannot move different versions of an object independently. The object master and all of its versions must be moved together.

For more information about versions see [Versions and Iterations](#).

Move and Processes

When an object is moved from one context to another, its name and number does not change. Any running processes associated with the object version that you are moving is moved with the version as long as the templates used to create these processes are managed at an organization or site level. These processes may include team, associated workflow processes, life cycle, and access control permissions.

Tip: It is best to use the same life cycle for the same object type within an organization. This prevents life cycle inconsistencies between contexts.

If any of the templates for the processes listed above are managed in a product or library context, the object cannot be moved. When the moved object is revised, the new version will be assigned new processes, including a team, workflow, life cycle and access control permissions.


These processes may change, as they will be subject to the policies or rules in which the object is now managed. For example, the access control policies may be different in the object's new location; therefore, the access control policies would change. In this case, users who were able to access objects in the former context may no longer have access. These users would need to be given access in the new context. For more information, see your administrator.

Tip: It is best to move an object when its latest version is released. This way, new versions created in the context are assigned a team, life cycle, workflow, and access control rules based on the rules of the context in which it is now managed.

Remove and Delete

The **Remove** and **Delete** action are both available throughout Windchill PDMLink; these actions serve two different purposes.

When you use the **Remove** action, you are simply eliminating a relationship between that object and something else--another object, a folder, or a context. For example, you can eliminate the relationship between an object and a related

Windchill document by clicking the remove icon  on the **References Documents** or **Referenced By Documents** table. This breaks the relationship between the object and document and removes the document from the table. However, that document remains in the Windchill database.

The **Delete** action allows you to completely remove objects from the Windchill database. You may want to delete an object, for example, if an error was made when it was being created.

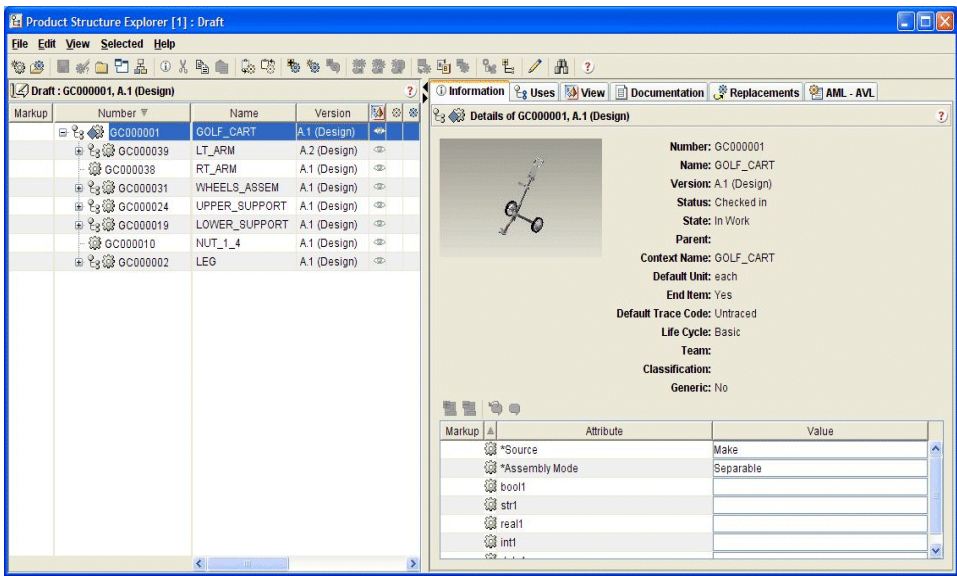
You can delete both versioned and non-versioned objects. In some cases, you can also delete specific versions or iterations of the object and leave others in the system. For example, you can delete all but the most recent iteration of the current version of a Windchill document using the **Delete Non-latest Iterations** action. If the current version of a document is A.3, this action will delete iterations A.1 and A.2 from the database.

Note: The **Delete** action works differently for objects that are shared or checked out to a project. For more information, see [Sharing Information Between Windchill ProjectLink and Windchill PDMLink or Arbortext Content Manager](#).

Product Structure Explorer

The information discussed previously in this chapter describes the layout of the Windchill web-based pages. Product Structure Explorer (PSE) is a Java application that is part of Windchill PDMLink. PSE focuses on a product structure that displays in the left pane of the application. When an object in the structure is

selected, tabs in the right pane display information related to the object, as shown here:



The attributes for the part, and usage, display is on the **Information** tab while visualization capability is available from the **View** tab. For more information the other tabs, see [Associating and Relating Information](#).

4

Finding Information

Windchill provides several ways in which you can find information. The type of information that you are looking for may help you determine which of these methods you use. If you want to search for objects using keywords or attributes, you can use the search functionality. Or, if you know in which folder the object you want is located, you can navigate to that object using the **Folders** page.

When performing certain Windchill actions, you may additionally be able to use the collector to search for objects that are in some way related to the object you have selected. Finally, if you are looking for information about an object rather than the object itself, you can generate reports to find the necessary information.

Topic	Page
Search	4-2
Find in Structure and Queries.....	4-7
Collector	4-7
Folders	4-9
Reports.....	4-10
Comparison Reports	4-12

Search

Searching in Windchill allows you to find objects in your database by searching attributes. If you have index searching capabilities, you can also search by object contents.

You encounter search throughout Windchill as you perform various actions. For example, when creating a Windchill document, you can search for the folder in which you want the document to be located. You can also use the search and advanced search pages to perform more in-depth searches.

Note: This chapter describes the object types and fields that appear by default when Windchill is installed. However, both may be augmented by customizers at your site. For example, your site may have created additional object types and attributes which can be searched.

Search and Search Within Fields

A **Search** field appears on the Windchill header, and **Search Within** fields appear on pages throughout the interface. These fields allow you to perform keyword searches by specifying simple search criteria, such as words or numbers.

The **Search** field searches for the keyword throughout the Windchill database, and it returns all of the matching objects to which you have access.

The **Search Within** field limits your search to objects that reside within a particular context and to which you have access. For example, from the **Home** tab, the **Search within my work** field limits your search to only the objects that you have created or modified and have access to.



Note: The **Search** and **Search Within** fields only search for the object type selected on the **Search** page. For more information, see [Search and Advanced Search Pages](#).

Index Search

If the index search functionality is enabled, you can perform index searches throughout Windchill. When performing an index search, your search results return any objects that contain the specified keyword in either the object attributes or the object content.

When performing an index search, the system provides spelling suggestions for words that may have been misspelled. It also ranks the search results based on how well each result matched the search criteria.

Tip: When performing an index search, certain characters are considered white spaces. If you use any of the following characters in an index search, your entry will be split into separate pieces: comma (,), semicolon (;), colon (:), underscore(_), hyphen (-) and slash (/). For example, if you search for Golf_Cart, the underscore character is interpreted as white space, and your entry is translated as two separate words: Golf Cart.

When Windchill documents are returned in an index search, you can mouse over the document number to see a preview of the matching text within that document.

Note: You will not be able to see a preview of matching text for objects that do not include an object number.

Wildcards

You can use wildcards to broaden any keyword search. For example, if you do a keyword search for "eng*", then any object with a name or number containing that keyword is returned. Object names such as "Engine" and "EngNew," and object numbers such as "engine45" are returned in the search results.

Search and Advanced Search Pages

The **Search** page allows you to easily search for objects using common attributes, such as name and number. You can choose to search for a single object type, a selection of multiple types, or all types. You can also choose which context to search.

The screenshot displays the Windchill search interface. At the top, there's a 'Search' tab and a link to 'Advanced Search'. To the right, 'Saved Searches' includes a dropdown menu set to '-- Select --' and a 'Select' button with a help icon. A 'Preferences' link is also present. The main section features a 'Keyword:' text input field. Below it, 'Show Results:' has two radio buttons: 'With All of These Criteria' (selected) and 'With Any of These Criteria'. To the right, 'Results Per Page:' is set to 15. The 'Define Scope of Search' section contains a 'Search In:' dropdown set to 'All Contexts', two checkboxes for 'Search only in contexts I'm a member of' and 'Search only in contexts in my organization' (both unchecked), and a 'Search For:' dropdown set to 'Document' with a 'Customize...' link. The 'Select Search Criteria' section has fields for 'Name:' and 'Number:'. Below these, 'Last Modified:' and 'Created On:' each have a radio button for a date range (selected) and two date pickers for 'From:' and 'To:'. The bottom right contains 'Save This Search', 'Clear', and 'Search' buttons.

The **Advanced Search** page allows you to search on a single object type by building detailed searches from the object attributes using the **Search Criteria**

table. You may choose to use the **Advanced Search** page when you want to search using several criteria.

Tip: To search for a work item, import job, or part instance, you must use the **Advanced Search** page.

Search | Advanced Search Saved Searches: -- Select -- Select ?

Keyword:

Preferences

Show Results: ☒ With All of These Criteria ☐ With Any of These Criteria Results Per Page: 15

Define Scope of Search

Search In: All Contexts Search For: Document Find...

Select Search Criteria

Criteria: -- Select -- Add

Search Criteria (0 objects)			
	Name	Operator	Value
No Objects to Display (0 objects selected)			

Save This Search Clear Search

Like the **Search** and **Search Within** fields, you can also perform a keyword search using the **Search** and **Advanced Search** pages. If you select **With All of These Criteria**, the search results return only those objects which match all criteria specified (an AND search). If you select **With Any of These Criteria**, the search results return objects which match any of the specified criteria (an OR search).

Note: If you enter a value in the **Keyword** field, that value is maintained when navigating between the **Search** and **Advanced Search** pages. The **Keyword** value is also maintained when changing object types if a search has already been performed. The **Keyword** value is not maintained if you leave either search page to perform another action, and then return to the search page.

You can also narrow the scope of the search using additional criteria within the body of the **Search** and **Advanced Search** pages, such as context, object type, version, and iteration.

The scope of your search may differ depending on your user role and permissions. For example, when you select **All Contexts** from the **Search In** field, your search will be limited to the contexts to which you have access.

For more information about contexts, see [Viewing and Organizing Information](#).

Network Searches

From the **Network** table of a context, you can search for objects in all or selected contexts of a network using the Search in network icon. You can also choose to limit your search only to objects that include the current context as a related context using Search for related objects icon.

The search page that appears when you click either of these icons is similar to the **Advanced Search** page. However, it also includes an additional pane that is specific to networks.

Note: Networks are available only if Windchill ProjectLink is installed.

Search in Network

The Search in network action allows you to find objects in all or selected contexts of a network.

When searching in a network, all contexts in the network are automatically searched unless you previously selected specific context on the **Network** page. You can click the **Customize** link in the **Search In Network Contexts** field to choose specific types of contexts in which to search.

You can also choose which types of objects to search for and limit the selected object types to those with a particular relationship to the referenced context.

Once you have found the objects you are searching for, you can notify the owners of each found object using the Email Object Owners action in the **Search Results** table.

Search for Related Objects

The Search for related objects action allows you to find objects that include the current context in their related contexts. You can also choose which types of objects to search for and limit the selected object types to those with a particular relationship to the referenced context.

Once you have found the objects you are searching for, you can notify the owners of each found object using the Email Object Owners action in the **Search Results** table.

Saved Searches

To make frequently performed or highly detailed searches more accessible, you can save search criteria specified on either the **Search** or **Advanced Search** page. Administrators can also save common searches and assign them to members of groups.

Your saved searches are managed in the **Saved Searches** table, which is accessed by selecting **Customize** from the **Saved Searches** drop-down list. This table displays all searches which you have saved, as well as any administrator-created searches assigned to a group of which you are a member.

Saved Searches (8 of 8 total objects) Current View: Default Saved Search View ?

Name	Actions	Created By	Scope	Created On	Group Access	Show
Save1	Actions	???creator???		2007-07-12 14:47 GMT-05:30		✓
save	Actions	???creator???		2007-07-12 14:46 GMT-05:30		✓
bohoo	Actions	???creator???	Demo Organization	2007-07-12 21:19 GMT-05:30		
same_name	Actions	???creator???		2007-07-12 13:01 GMT-05:30		✓
ssearch123	Actions	???creator???	Demo Organization	2007-07-12 22:05 GMT-05:30		
Last Search	Actions	???creator???		2007-07-11 11:12 GMT-05:30		
same_name2	Actions	???creator???		2007-07-12 15:07 GMT-05:30		✓
san	Actions	???creator???		2007-07-12 15:25 GMT-05:30		✓

(0 objects selected)

You can use the toolbar actions on the **Saved Searches** table to determine which saved searches are displayed in the table and which are hidden. This allows you to limit the saved searches in your table to only those that you consistently use.

Search Results

When you perform a search on the **Search** or **Advanced Search** page, the objects matching your search criteria are displayed in the **Search Results** table at the bottom of the page.

Search Results (15 of 20 total objects) Current View: Default ?

Number	Name	Actions	Context	Version	Organization ID
0000000031	abc	Actions	GOLF_CART	A.0	Demo Organizatic
0000000030	abc_doc1	Actions	GOLF_CART	A.0	Demo Organizatic
0000000029	abc_doc4	Actions	GOLF_CART	A.0	Demo Organizatic
0000000028	abc_doc3	Actions	GOLF_CART	A.0	Demo Organizatic
0000000027	abc_doc5	Actions	GOLF_CART	A.0	Demo Organizatic
0000000026	abc_doc2	Actions	GOLF_CART	A.0	Demo Organizatic
0000000025	Doc001	Actions	GOLF_CART	A.0	Demo Organizatic
0000000015	demo_schematic	Actions	Product_ECAD	A.0	Demo Organizatic

(0 objects selected) Page 1 of 2 First 12 Last Full List

Only those objects to which you have at least read access are included in your search results. The number of objects displayed per page of the **Search Results** table is determined by the value you specify in the **Results Per Page** field before you executed the search. If nothing was specified, it defaults to the value specified in your search preferences. For more information about preferences, see [Setting Up Your Environment](#).

You can also export search results to a spreadsheet. This allows you to work with your search results outside of Windchill.

Tip: If a search is not explicitly named when it is created as an export file, it will include the user name of the creator and the numeric form of the date-time by default. For example, an export file containing search results may appear as follows: SearchResults_demo_1175790221708.csv. Note that the file extension will be different depending on the export format.

For more information, see [Importing and Exporting Information](#).

Find in Structure and Queries

When you work in Product Structure Explorer (PSE), you have two other options for searching for information:

- **Find in Structure** action available in the **Edit** menu.
- **Query** action available in the **View** menu.

Both of these actions assist you in locating information based on criteria you select. The **Find in Structure** action uses the name and number attributes to jump to those parts in the structure that match the criteria. Queries can be created and then saved for use with other structures and in future sessions of PSE. In addition, with queries you select how you want the results of the query to display. For example, you can have an icon indicate matching results, or have the rows of the structure highlighted with a specific color. For more information, access the online help in PSE.

Collector

The collector is a tool that is used within many Windchill processes to find related objects. It is different than the regular search functionality because it allows you to request additional data by navigating relationships to find the objects you want without having to search for one object at a time.

Depending upon the action you are performing, the collector may appear as a table, or it may appear as a pane with two available tabs: **Basic** and **Advanced**.

Collecting in Basic Mode

The **Basic** mode of collection allows you to specify a simple set of rules and continue on with the process without displaying the list of collected objects. When collecting in **Basic** mode, you can choose whether to collect just the objects related to the **Initially Selected** object, **All** objects, or **None** of the objects for each rule defined.

For example, when you add an object to a workspace, the collector appears in **Basic** on the **Add to Workspace** window. However, after specifying your collection rules, you can click the **Advanced** tab to view your collection in a table.

Basic **Advanced**

*Check Out:

Current Configuration: Part Processing, Latest..., None Dependents [Advanced processing options](#)

Configuration

Change Configuration to:

Dependencies

Dependents:

Collect Related Business Objects

Parts: Generics:

Drawings: CAD Documents:

Family Table:

Note: Action-specific fields may appear in the collector pane. For example, in the **Add to Workspace** window, the **Check Out** field appears.

For more information about the fields available in the **Basic** mode, click the help button on the **Basic** tab of the collector.

Collecting in Advanced Mode

In most cases, the collector appears as a table. In cases where there are two tabs or modes for the collector, this table is available under the **Advanced** tab. The **Advanced** mode allows you to specify collection rules and look for related objects. The collected objects are displayed in the table, and you can use those objects to create new incremental collections.

For example, when you choose the **Delete** action from the actions list for an object, the collector appears in **Advanced** mode, allowing you to find related objects that also may need to be deleted.

Current Configuration: Part Processing, Latest..., None Dependents

Item List (1 of 1 total objects) Current View:

Configuration

	Name	Number	File Name	Collection Rule	Revision	Context	Last Modified	State
<input type="checkbox"/>	p1	0000000001		Initially Selected	A	GOLF_CART	2007-06-26 06:27 PM GMT+05:30	In Work

(0 objects selected)

Depending on which process you are performing, other menus, such as **File** and **Edit** may appear at the top of the table. Additional actions may also appear in the table toolbar.

Note: If on the **Advanced** tab, you change configuration criteria or rule criteria that you set in **Basic** mode, the collected data set will change, and originally collected data may be lost. Data may also be lost if you change one or more rules on the **Advanced** tab, and then move from **Advanced** to **Basic**. A window

appears, allowing you to confirm that you want to move to **Basic** mode or cancel the action.

For more information about the menu options and actions available in **Advanced** mode, click the help button on the collector table.

Folders

The **Folders** page provides a central location for accessing information about objects contained within a particular context. For more information about contexts, see [Viewing and Organizing Information](#).

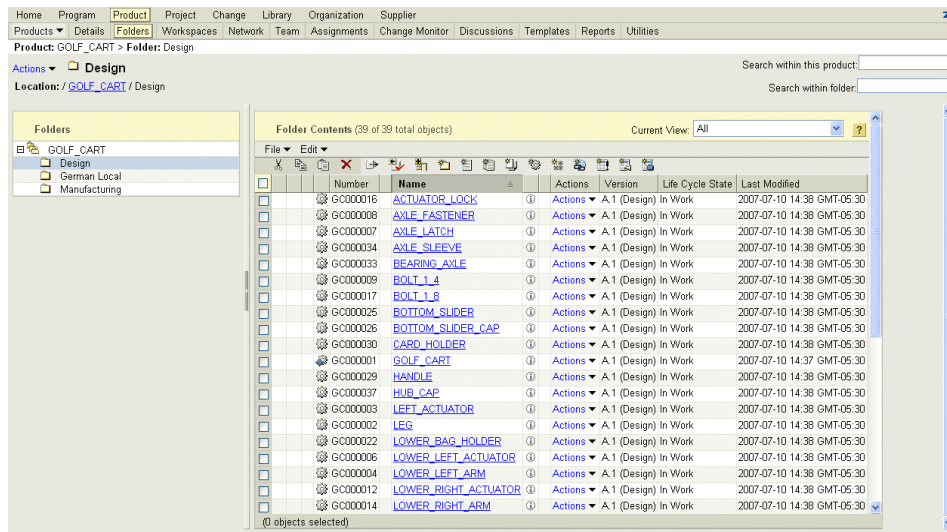
The attributes of the folder that you are viewing display at the top of the page. An actions menu is available for that folder, and you have the option to search specifically in that folder using the **Search within folder** field. For more information about this field, see [Search and Search Within Fields](#).

The browser pane to the left of the **Folder Contents** table lists the folders and subfolders available for this context and allows you to browse.

Tip: If you do not want the browser pane to appear, you can hide it by clicking the collapse icon on the divider or by double clicking the divider bar. You can also resize the browser pane by clicking the divider bar and dragging it to your preferred width. To keep the browser pane from appearing by default, you can modify the left pane folder explorer preference. For more information, see [Preferences](#).

For example, on the **Folders** page of the product GOLF_CART, the folders are listed on the left and can be expanded in the left pane. In the picture below, the Design folder has been expanded in the left pane, and the objects found in that folder are displayed in the **Folder Contents** table.

The **Current View** of the **Folder Contents** table is set to **All**, so all of the objects within that context are displayed. To help focus the table on a more specific subset of objects within the context, you can change the **Current View** to show only the objects that you want to see. For more information about changing and customizing table views, see [Table Views and Filters](#).



For more information on the actions available from the **Folder Contents** table, access the online help available from that table.

Reports

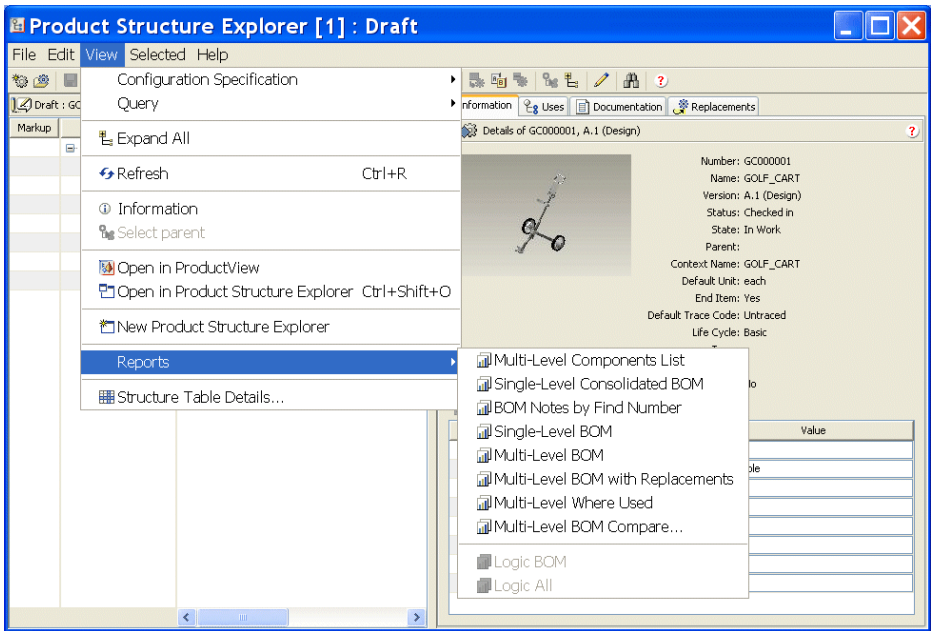
Reports in Windchill PDMLink let you view the output of a predefined query, often using parameters you choose when you run the report. You can use reports for many purposes, including identifying trends, summarizing information about particular objects, identifying objects in certain states, and so on. Reports can be generated in multiple output formats, such as PDF, XML, HTML, and CSV, depending on your needs and how each report is defined.

The **Reports** page located on most tabs is the primary location for reporting functionality within Windchill PDMLink. The **Reports** table contains the predefined reports for each tab that were installed with Windchill PDMLink and any new reports created at your site. From the **Reports** table, you can view any report listed.

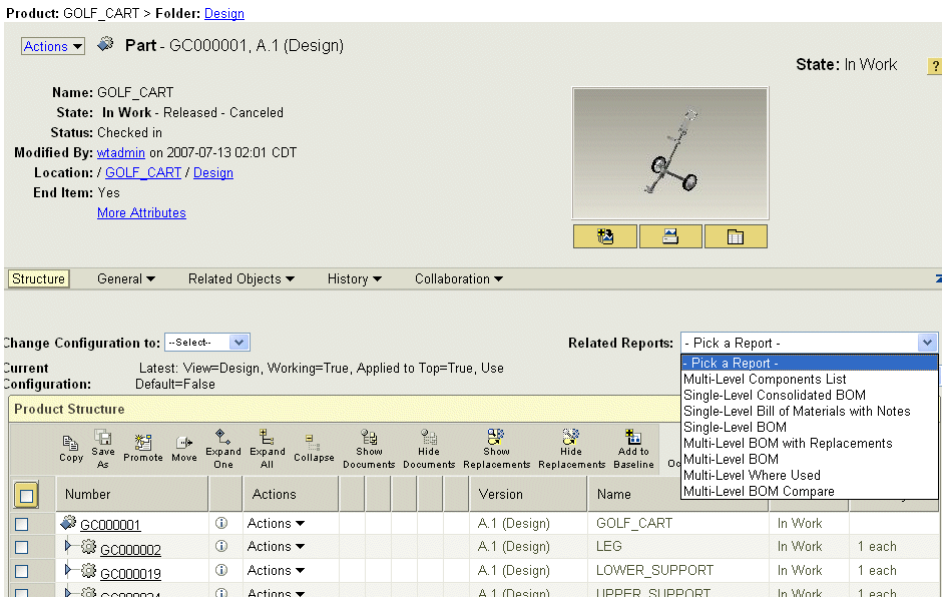
Reports (4 of 4 total objects)						Current View: Reports	
	Name		Actions	Description	Context		
	Problem Report Status Report		Actions	This report lists state and status of all Problem Reports.	Site		
	Change Request Status Report		Actions	This report lists state and status of all Change Requests.	Site		
	Change Notice Status Report		Actions	This report lists state and status of all Change Notices.	Site		
	Variance Status Report		Actions	This report lists state and status of all Variances.	Site		

You can also search for a report using the Search or Advanced Search. For more information, see [Search and Advanced Search Pages](#).

The Product Structure Explorer and part structure provide a number of related reports you can use when viewing a product structure. To access reports from Product Structure Explorer, select **View > Reports**.



For the part structure, select the report from the field above the structure table:



The **Change Monitor** page on the **Product**, **Change**, and **Library** tabs of Windchill PDMLink includes the All Special Reports list. This list includes all

special reports installed with Windchill PDMLink and any custom reports created by a person with administrator rights on the **Site** tab.

If your site has installed and enabled Windchill Business Reporting, additional reporting capabilities are available to you, including scheduling reports, reports using charts and graphs, and various delivery options, such as printing and e-mail. Windchill Business Reporting uses a third-party reporting application that works with your data to provide rich and flexible report options. Change Monitor reports do not use Windchill Business Reporting functionality. For more information, see the *Windchill Business Administrator's Guide*.

Predefined Reports

Predefined reports are those reports that are installed with Windchill PDMLink. Your site administrator can also create additional reports that are specific to your site. These predefined reports make use of the additional features available if Windchill Business Reporting is enabled at your site but are still available with fewer features if Windchill Business Reporting is not enabled.

The following predefined reports display on the **Reports** table of appropriate tabs or other locations, as noted below:

Report Name	Tab or Display Location
Problem Report Status Report	Product, Library, Change
Change Request Status Report	Product, Library, Change
Change Notice Status Report	Product, Library, Change
Variance Status Report	Product, Library, Change
Multi-Level BOM Report	Product Structure Browser and Product Structure Explorer Related Reports list

Comparison Reports





Comparison reports in Windchill PDMLink contain a side by side comparison of the differences in two or more objects.

Baseline Comparisons

The baseline comparison report is useful if you want to compare the objects in two baselines. To compare baselines, select the **Information Compare** action from the **Actions** list on a baseline information page or from the **Folder Contents** table.


The baseline comparison report includes:

- The difference in attribute values for an object that exists in all the baselines you choose to compare. From the baseline comparison report, you can also view a comparison report for each of the objects within the baseline.
- The objects that exist in one baseline but not in the others are included in the report.

Comparison Report			
Attributes:		Choose new objects to compare Change comparison options	
 0000000161 (Demo Baseline 2) ⓘ	 0000000141 (Demo Baseline 1) ⓘ		
Name	Demo Baseline 2	Name	Demo Baseline 1
Location	/Default/Design	Location	/Default
Baseline Members:			
 0000000161 (Demo Baseline 2) ⓘ	 0000000141 (Demo Baseline 1) ⓘ	Actions	
--	GC000011, Demo Organization, A.1 (Design) ⓘ		
--	GC000009, Demo Organization, A.1 (Design) ⓘ		
--	GC000006, Demo Organization, A.1 (Design) ⓘ		
--	GC000038, Demo Organization, A.1 (Design) ⓘ		
--	GC000017, Demo Organization, A.1 (Design) ⓘ		

Information Comparisons

An information comparison report compares two or more objects or compares different iterations of the same object. To compare information, select the **Information Compare** action from the **Actions** list on the object's information page or click the information compare icon on the table toolbar.

You can also choose the **Compare Objects** icon  on the **Resulting Objects** table on the **Change Task** page to view an information compare report. When you compare objects from the **Change Task** page, you do not choose the object you want to compare to. Instead, Windchill compares the resulting object to the closest revision of the same object in the **Affected Objects** table.

Note: The closest revision of an object may not be the previous revision.

You can choose to compare various information about the objects, such as attributes, related documents, attachments, and so on.

If a field on the report contains a double dash (--), the object does not have that parameter. If a parameter does not appear on the report, it is because there are no differences in the parameters or none of the objects being compared have that parameter.

Comparison Report

[Choose new objects to compare](#)
[Change comparison options](#)

Attributes:

<div>0000000341, Demo Organization, A.0</div>		<div>0000000521, Demo Organization, A.0</div>	
Context	TestProject, Demo Organization	Context	TestProject, Demo Organization
Description	Doc1	Description	--
State	In Analysis	State	In Work
Format Name	Microsoft Word	Format Name	Unknown
Modified By	demo	Modified By	Administrator
Created By	demo	Created By	Administrator
Number	0000000341	Number	0000000521
Title	Doc1	Title	--
Name	Doc1	Name	docdefinedetails
Location	/Default/Designs	Location	/Default

Primary Content:

<div>0000000341, Demo Organization, A.0</div>		<div>0000000521, Demo Organization, A.0</div>	
<div>Doc1.doc (Document - 0000000341, Demo Organization, A.0)</div>		--	
--		<div>docdefinedetails.avi (Document - 0000000521, Demo Organization, A.0)</div>	

Attachments:

EDA Content Comparisons

An EDA content comparison uses the InterComm EDACompare application to compare:

- Two Windchill documents with EDA files as primary content
or
two iterations or versions of such documents
- Two CAD documents with EDA files as secondary content
or
two iterations or versions of such documents
- A Windchill document with EDA files to a EPM document with EDA files

You must have the EDACompare application installed to compare content. A Windchill document must have been created as InterComm Data soft type for the **Content Compare** action to appear on the actions menu.

You can choose **Content Compare** on:


- A CAD document with EDA file as attachments.

If the document does not have EDA attachments, you receive a message stating that you cannot run the content comparison report.

- The information page of a Windchill Document with InterComm Data soft type and EDA file as a primary content

Choose **Content Compare** from the actions menu. You can also check two EDA documents on the **Iterations** table or **Revisions** table and click the **Compare Content** icon.

- Any of the objects mentioned above in the **Resulting Objects** table of the **Change Task** page.

To compare content, click the **Compare Objects** icon  on the resulting object and choose **Content Compare**. The resulting object is automatically compared with the closest revision of the corresponding object in the **Affected Objects** table of the change task. If the resulting object does not have a corresponding object in the **Affected Objects** table, you receive a message stating that you cannot run the content comparison report.

Note: The closest revision of an object may not be the previous revision.

When you choose **Content Compare**, the EDACompare application opens and you can choose object you want to compare to. For more information on running the comparison, access online help from the EDACompare application.

Pro/ENGINEER Content Comparison

A Pro/ENGINEER content comparison report compares two iterations or revisions of a CAD document. You must have Pro/ENGINEER installed to run the comparison.

To generate a comparison report, select the two CAD document iterations or revisions from either the **Iteration History** table or **Revision History** table and then select the Content Compare icon. These tables are available from the **History** menu on a CAD document's commonspace information page.

For more information, see *Using Pro/ENGINEER Wildfire with Windchill*.

Logic Comparisons

A logic comparison report compares the logic of two generic parts or compares two iterations of one generic part. To compare logic, select the **Logic Compare** action from the generic part's **Actions** list.

You can choose to compare the following aspects of logic:

- parameters
- constraints

- pages
- components
- application data
- general information such as the number of parameters and constraints

If comparable logic objects are present in both logics (for example, parameters with the same name or pages with the same number), the report displays only those attributes of the objects that are different.

If an object of one logic does not have a corresponding counterpart in the other logic, the report shows all its attributes in the logic section where it is present but the row entries of the other logic are blank. For example, if a parameter of one logic base does not have a counterpart parameter with the same name in the other logic base, the report shows the allowed, iba, input, required, and type attributes of the parameter in its logic section and blank values in the logic section from which the parameter is omitted.

If you want to view the complete logic for one of the generic parts being compared, click the part's link at the top of the report. This logic report is identical to the report generated when you select the **View Logic** action on the generic part's information page.

Logic Comparison Report

1. [OVDEMOGP00001-2-ComputerGP](#)
2. [OVDEMOGP00003-MonitorGP](#)

General Information	Parameters	Constraints	Pages	Components	Application Data
---------------------	------------	-------------	-------	------------	------------------

General Information

	Name	ComputerGP (A.3)	MonitorGP (A.1)
Application Data			
Authoring Application			Configuration Modeler
Summary			
name	ComputerGP		MonitorGP
number	OVDEMOGP00001-2		OVDEMOGP00003
parameters	3		1

Parameters

	Name	ComputerGP (A.3)	MonitorGP (A.1)
monitorType			
allowed			LCD, CRT
iba			OVDemoMonitorType
input			true
required			true

Variant Solution Comparisons

A variant solution comparison report compares all the components of two variant specifications. To compare variant specifications, select **Compare Variant Solution** action from the variant specification's **Actions** list.

The variant solution comparison lists each of the component parts of the variant solution you selected to compare along with their parameters. The Equal column states whether the corresponding components and parameters are identical (true) or different (false). Parameters with the same name and of the same part are identical if they have the same value. Components of the same part with the same name are identical if all their parameters and components are identical.

Compare Variant Solution						
Comparing Variant Specifications '00001 - OVDemoDesktopSpec1, A' and '00002 - OVDemoLaptopSpec2, A' (15 total objects)						
<input type="checkbox"/>		Components	Value/Quantity	Components	Value/Quantity	Equal?
<input type="checkbox"/>		ComputerGP	-	ComputerGP	-	false
<input type="checkbox"/>		needDVDROMDrive	Yes	needDVDROMDrive	No	false
<input type="checkbox"/>		platform	desktop	platform	laptop	false
<input type="checkbox"/>		secondHardDrive	Yes	secondHardDrive	No	false
<input type="checkbox"/>		ProcessorGP	2	ProcessorGP	2	true
<input type="checkbox"/>		chipset	Medium	chipset	Medium	true
<input type="checkbox"/>		MonitorGP	1	MonitorGP	1	true
<input type="checkbox"/>		monitorType	LCD	monitorType	LCD	true
<input type="checkbox"/>		HardDriveGP	1	HardDriveGP	1	true
<input type="checkbox"/>		hardDriveCapacityGB	80	hardDriveCapacityGB	80	true
<input type="checkbox"/>		hardDriveType	SATA	hardDriveType	SATA	true
<input type="checkbox"/>		HardDriveGP	1		-	false
<input type="checkbox"/>		GraphicsCardGP	1	GraphicsCardGP	1	false
<input type="checkbox"/>		graphicsCardMemoryInMB	512	graphicsCardMemoryInMB	256	false
<input type="checkbox"/>		DVDROMDrive	1		-	false
(0 objects selected)						

5

Creating Objects




As detailed in [Windchill PDMLink Objects](#), different objects exist in Windchill PDMLink in order to hold different types of content. For example, Windchill documents hold primary content such as DOC files while CAD documents hold files created in a CAD tool like Pro/ENGINEER, such as PRT and ASM files.

Just as objects contain different forms of content, the manner in which the objects are entered into Windchill PDMLink is different. This chapter discusses the objects that you create in the system. For information on objects that enter the system through the workspace, see [Workspaces](#). Also, because change objects are created in order to modify other objects in the system, their creation is described in [Modifying Objects](#).

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Documents

Creating a Windchill document involves creating the object and defining attributes including any primary content or additional attachments you want to add. There are several ways to go about creating a new Windchill document. You can choose to create:

- a single document: 
- a single document based on a template: 
- multiple documents at once using files from your local machine as primary content: 
- a single document, a single document based on a template, or a document template from a Microsoft application using Windchill Desktop Integration

Although you can create documents from various locations throughout Windchill, the main launch point for creating documents is the **Folder Contents** table.

New Document

The **New Document** action allows you to add a single document to Windchill. The document may or may not contain primary content from a local file, URL, or externally stored content as well as additional attachments.

New Document from Template

The **New Document from Template** action allows you to add a single document to Windchill based on a document template provided by your administrator. The new document will be assigned any attributes defined in the template, such as name and description, as well as primary content and other attachments. Depending on the templates that your administrator creates, you could choose from templates for several types of commonly used company documents such as meeting minutes, design specifications, or product requirement documents.

New Multiple Documents

The **New Multiple Documents** action allows you to add multiple documents to the current context in Windchill at once based on files you select on your local machine. For example, if you have four files to upload into Windchill, you could use this action to create four documents at once, rather than completing the **New Document** action four times. Windchill creates a separate document for each file and attaches the file as the document's primary content.

This action imposes the following restrictions on the new documents:

- All documents must contain primary content from local files (not URLs or externally stored content).

- All documents must be of the same document type, for example, all reference documents, and reside in the same folder location.
- All documents must have the same attribute values, with the exception of Name, Number, and Description which can be unique. Once the documents have been created, you can edit attributes for each document individually using the **Edit Document** window.
- You cannot define additional attachments. Once the documents have been created, you can add attachments to each document individually using the **Edit Document** window.

Using Windchill Desktop Integration



In Windchill Desktop Integration, you can create a new document or a new document from a template with the following differences:

- You must specify the context in Windchill where the document will be stored.
- All documents require primary content from local files.
- Attachments are not supported. Once a document has been created, you can add attachments to it by editing the document from Windchill.

For more information on Windchill Desktop Integration, see [About Windchill PDMLink](#).

Parts

You can choose to create multiple parts or create one part at a time by choosing between the two different icons in the toolbars or options within actions lists:

- New Part: 
- New Multiple Parts: 

Note: If you choose to create multiple parts, all of the parts are created in the same folder of the same context. Attributes other than name and number are identical.

Both of these options are available from the web-based pages of Windchill PDMLink. If you are planning to do more structure authoring on parts, you may choose to launch the Product Structure Explorer (PSE). In the PSE, the **New Multiple Part** action is not available; however, you have the option to work in Draft or Annotate mode where you can quickly enter the information in the structure tables, and then commit the parts to the database at once. For more information, access the online help available from PSE.

No matter which application you use to create the part, you determine whether or not the part is generic and whether or not the part is an end item.

- Generic -- the part represents multiple choices or options and its definition can vary based upon its usage. For example, a generic part might represent a tabletop with a specified width and any length between two specified values. A generic part cannot be manufactured because at least one of its identifying characteristics is not completely defined. When determining if the part is generic, you have three options:
 - No -- the part is not generic
 - Yes -- the part is generic but not intended to be configured
 - Configurable -- the part is generic and is intended to be configured
- End item -- the part is intended to be the top assembly in a product structure.

When you complete the steps in the **New Part** window, you are returned to the location from which you launched the action. You can see the new part or parts you created and choose whether or not to associate objects to the parts or modify information about those parts. For more information on these actions, see [Associating and Relating Information](#) and [Modifying Objects](#).

Set Context

In cases where a **Set Context** step appears on a new object window, you can select a context other than the current one in which to create the object. Once created, the object can be shared to another context or associated with additional contexts, but the context you specify will own it. For information on associating objects with contexts, see [Associating and Relating Information](#). For information on sharing objects between contexts, see [Sharing Information](#).

Save As

You can create a new object from an existing one by using the **Save As** action on the **Folder Contents** or **Structure** tables. A window opens, allowing you to select the options you want to include. Windchill copies the object and stores it as a new object. This action is not available for all types of objects.

In Product Structure Explorer (PSE), the **Save As** action is used to save draft changes as an annotation set. As a result, to create a new object from an existing on, you select the **Duplicate** action. For more information, see the following section.

Note: If you perform a **Save As** action on multiple objects in a structure, the relationship may or may not be maintained. For more information, see [Part-to-Part Relationships](#) in the chapter [Associating and Relating Information](#).

Duplicate

When you work in Product Structure Explorer (PSE), you can create a new part from an existing part using the **Duplicate** action. In the structure, first select the

part you want to duplicate, and then select **Selected > Duplicate**. For more information, access the online help available from the Product Structure Explorer.

Special Characters in Windchill PDMLink

When you create objects, you enter information in a variety of fields. The following characters have special meaning in the system and should be avoided when defining attributes, such as **Name**:

- <
- >
- "
- '
- &
- %
- \$

Also adding more than one space between letters can also cause an error. In addition to the preceding list, the following characters are problematic for folder names:

- /
- \
- !
- @
- #
- ^
- *
- ()
- :
- ?
- |

The following should not be used in UNIX file names:

- \
- The extension ".LNK" or ".lnk."

6

Modifying Objects

Windchill PDMLink provides several ways in which you can modify objects. This chapter describes iterating, revising, editing, and renaming objects. It also describes the change management process.

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Versions and Iterations	6-4
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Check Out and Check In

Certain types of objects, such as Windchill documents, are managed with check-out and check-in functionality. Check out places a lock on the object in the database so although other users can obtain read-only copies of it, they are prevented from modifying it while you have it checked out. Glyphs in the Windchill PDMLink user interface let other users know that the document is checked out.

You can release your hold on the object and make it available to others again by undoing the checkout or checking the object back in. When you check in an object after making modifications, your working copy becomes the new iteration and the previous iteration is unlocked. In Windchill PDMLink, you can create a new version of a object rather than an iteration by using the **New Revision** action. For more information, see [New Revision](#).

Check-out and check-in actions are available in the following locations:

- Information page of an object
- **Folder Contents** table
- Product Structure Explorer
- Some tables under the **Home** tab
- The **Check In** action may be available on edit windows, depending on your system preferences.

The objects you check out appear in your **Checked-Out Work** table under the **Home** tab. Past iterations are stored in the **Iteration History**, available from the **History** navigation menu, on the object information page.

Undoing a Checkout

You can cancel the checkout by selecting the **Undo Checkout** action. This removes the lock on the object in the database and makes it available for other users to modify. If the object is a Windchill document, any changes you made to the working copy after checking out the document will be lost.

Note: Users with administrative privileges may be able to undo checkout of an object checked out by another user. For more information, see the *Windchill Business Administrator's Guide*.

Checking Out a Document

In addition to using the **Check Out** and **Check Out and Edit** actions available for other objects, you can check out a document by selecting the **Check Out and Download** action. This creates a working copy of the document's primary content file which you can download to your computer. For more information on downloading document content, see the chapter [Viewing and Organizing Information](#).

A document is automatically checked out and checked back in as part of the **Replace Content** action. For more information on replacing content, see [Primary Content for Windchill Documents](#) in the chapter [Associating and Relating Information](#).

New Revision

Each time you check in an object, a new iteration is created. Revising an object allows you to maintain (create new iterations in) different versions of an object. The **New Revision** action is available from actions menus throughout Windchill PDMLink. Additionally, from Product Structure Explorer, you can select **Selected > Revise**.

To view previous versions of an object, click the **History** link on the object information page, and then click **Revision**.

Revision Override

If the context has been set up to allow it, you can override the next revision label in the revision scheme with a higher revision label.

For a Windchill document, this is done by selecting **New > Insert Document** from the **File** menu on the **Folder Contents** table. For a part, this is done by selecting **New > Insert Part**.

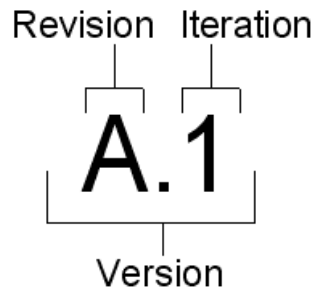
When you select the insert action, Windchill searches for the master. If no master is found it allows you to create a new object and specify the revision label. If a master is found, it allows you to edit object attributes including the revision label.

During the creation or revision process you are able to overwrite the system suggested revision value. You can revise a record in a non-sequential-ascending order or non-sequential descending order. You can also use the revision value specified in a system skip list. A revision of a new record does not always need to be created from the most recent revision.

Where integrations with the system generate auto-numbered documents you are presented with an option where appropriate to override the default revision value that is assigned at the same time that the auto-number is generated.

Versions and Iterations

Managed objects are assigned a revision and iteration. Together, the revision and iteration define the version (for example, A.1). The default revision sequence is A, B, C, and this sequence can be customized. The default iteration is 1, 2, 3....



An object's revision is changed using the **New Revision** action. For more information, see [New Revision](#). Windchill PDMLink automatically increments the iteration of an object each time the object is checked in. Additionally, Windchill PDMLink enables you to generate detail reports, so you can review every change made to an object. The example above represents revision A, iteration 1, or more succinctly, version A.1.

Note: Versioning a scheme at various context level can be changed through Object Initialization Rules Administrator. For more information, see the *Windchill Business Administrator's Guide*.

On an object information page you can view the previous versions of the objects using the Revision History and Iteration History tables. From this table, you can compare versions to identify differences in the attributes of each, and link to the information page of each version.

Edit

Using the **Edit** action, you can modify the attributes of an object. Select **Edit** from an actions list related to the object, for example, from the object information page or the object row in the **Folder Contents** table. The attributes you can modify vary depending on the object. Windchill documents, for example, have extra options that are described in more details below.

In Product Structure Explorer, information about objects is modified directly the tabs and cells of the tables. This may be done as a markup in the application or applied directly to the object in the database. For more information, see [Product Structure Explorer](#).

Documents

When you edit a document using the **Edit** or **Check Out and Edit** actions, you can do the following:

- Edit document attributes
- Add, remove, or edit primary content
- Change the primary content source and enter related attributes
- Add, remove, or edit attachments and related attributes
- Check the document in or save your changes to be checked in later

You also have the option to **Replace Content** for a document, in which case Windchill checks out the document, uploads primary content, and checks the document back in without editing any other document attributes. This action is available only when the document is not already checked out.

For more information on editing attachments, including primary content, see [Attachments](#).

After you have made your changes, check the document in or save your changes to be checked in later.

Parts

To edit a part in the standard Windchill, you have three options:

- Edit -- allows you to modify attributes unique to the selected part iteration, such as assembly mode and source.

Tip: This action is available only when the part is checked out to you. Select **Check Out and Edit** if you do not have the part checked out.

- Edit Common Attributes -- allows you to modify the attributes common to all iterations of the part, such as name and default unit.

Tip: This action is available only when the part is checked in.

- Edit Structure -- allows you to modify the existing product structure by adding and removing objects, and also editing the attributes associated with existing objects.

Editing parts outside of standard Windchill, meaning in Product Structure Explorer, works slightly different. For more information, see [Product Structure Explorer](#) or access the online help in Product Structure Explorer window.

Rename

You can rename an object by using the **Rename** action. This allows you to enter a new name or number for all versions and iterations of the object. Depending on your permissions, you may see a field for renaming the owning organization.

The rename does not create a new iteration of the object, nor does it change the time stamp for when the object was last modified.

Tip: Renaming an object will make it difficult for others to find it if they are searching by name.

Product Structure Explorer

The actions describe above, such as check in, check out, and rename are also available in Product Structure Explorer under the **Selected** menu.

If the Launch Mode preference is set to Edit, then you perform explicit check-out and check-in operations in order for the object to accept changes. When working with a draft or annotation set, markups of the structure are made. These markups may then be saved as an annotation set, or applied to the database. If the changes are applied to the database, the object is automatically checked out, modified, and optionally (based on a preference) checked back in. For more information, see [Preferences](#).

Change Management

Change management is the process by which objects in your company are formally changed. For example, if someone finds that there is something wrong with a part, change management is the process used to perform and verify the change. The change management system is based upon current industry standard change processes.

Change Objects

The following are the change objects used within the change management system.

Change Object	Description
Problem Report	Documents a problem or requests a product enhancement. Creating a problem report is one way to initiate the change process.
Change Request	Details the changes necessary to correct a problem or provide an enhancement so that the appropriate people can make the business decision to proceed with or cancel the proposed change. A change request can be created in response to one or more problem reports or without any reference to a problem report.

Change Object	Description
Change Notice	Details the tasks that need to be completed in order for a change to be implemented. The change notice enables you to assign the tasks to individuals. You can create a change notice in reference to one or more change requests or without a change request.
Change Task	Represents a work instruction that is necessary to complete in order to satisfy a change notice. A complex change notice may have many change tasks; a simple change notice might have only a single change task.
Variance	Provides an authorization to depart from the as-designed configuration for a specific number of units or for a specified time period. Two common types of variances are deviations and waivers.

Roles in the Change Process




The following table shows some specific roles for the change process. Your site may have changed the names of these roles and the responsibilities through a specific customization.











Role	Description
Change review board (CRB)	Reviews and either approves, denies, or requests further investigation of a change request. It is typically composed of representatives from company departments, such as Design Engineering, Manufacturing Engineering, and Quality Assurance.
Change implementation board (CIB)	Reviews and either approves or denies the implementation plan included in the change notice.

Role	Description
Change Admin I	The first change administrator screens the problem reports, reviews the change request, collects impact information, and communicates the decision to reject the change or implement it in either the fast or full track branches of the change management process. Change Admin I also creates the change requests from unresolved problem reports. You can search for unresolved problem reports using the reports on the Change Monitor page or from the Problem Reports page of the Change tab.
Change Admin II	The second change administrator is responsible for creating the implementation plan captured in the change notice. Change Admin II is also responsible for recording the decision of the Change Implementation Board (CIB) to proceed with the implementation plan.
Change Administrator III	The third change administrator acts as an auditor of all of the material related to a change, ensuring that all resulting documentation is clear, concise, and valid.

Change Management Actions and Icons

Throughout Windchill PDMLink, there are several actions associated with change management. On pages where there is no button, the actions are available from the actions list. The availability of actions depends on the access control permissions of individual users and the state of the change object.

Icon	Description
	Indicates that the change object is a problem report.
	Indicates that the change object is a change request.
	Indicates that the change object is a change notice.

Icon	Description
	Indicates that the change object is a change task.
	Indicates that the change object is a variance.
	Opens the New Problem Report window with steps to create a new problem report.
	Opens the New Change Request window with steps to create a new change request.
	Opens the New Change Notice window with steps to create a new change notice.
	Opens the New Change Task window allowing you to create a new task in the implementation plan for a change notice.
	Opens the New Variance window allowing you to create a new variance.
	Allows you to set or change the effectivity for a part included in the Resulting Objects table of a task.
	Indicates that the object is the subject of a pending change.
	Indicates that the object is the subject of a variance

Detailed procedures and descriptions of the fields on the windows for creating new and editing objects are included in the online help. For more information, access the online help from the appropriate page or table.

Full Track and Fast Track Changes

Changes can be either full track or fast track. Full track changes are those with a high impact and cost that require close analysis and review. Full track change requests must pass through the change review board (CRB) prior to implementation. Fast track change requests advance directly to implementation without CRB approval. Fast track changes have low impact and cost, and therefore, can be processed quickly through the change process.

The decision about making a fast track or full track change occurs as part of the change request process.

Tip: As a general guideline, it is advisable that fast track change requests make up approximately 80% of the average change requests within an organization.

Associating Problem Reports, Change Requests, and Change Notices

A problem report can be associated to only a single change request. In cases where similar problem reports exist, they can be grouped into a single change request.

Companies that receive complex problems that must be broken down into multiple change requests can be accommodated through an administrative preference (Change Request to Problem Report Cardinality).

In most cases, a single change notice is associated to a single change request. Complex change requests can be broken down into multiple change notices or similar change requests can be grouped into a single change notice, but not both.

The restrictions can be ignored by an administrative preference (Change Request to Change Notice Cardinality), allowing multiple change request to be associated to multiple change notices. This allows combinations of breakdown and grouping.


Annotations



Note: In order to manage annotations for a change object, you must have the proper access permissions.

Annotations are artifacts that users create in the course of a change process that further explain the change. You can add or remove a visual or structural annotation to a problem report, change request, change task, or variance by using the **Edit Annotations** action on a row in the **Affected Objects** table.

The action opens the **Annotations** table, allowing you to add by pasting from the Windchill clipboard or by using the **Add Annotation** toolbar action.

Incorporating Variances

A variance () is an authorization to depart from the as-designed configuration for a specific number of units or for a specified time period.

A variance is defined into two categories: deviations and waivers. A deviation () is a planned departure from the as-designed configuration before the part is built. A waiver () is a written acceptance of nonconformance.

Variances are created and edited the same way the other change objects are created and edited. To actually incorporate the variance, you can do the following:

- Initiate a change request from the variance. You can use the variance to create a change request.
- Select variances to be resolved by a change request. You can associate a variance to a change request.

- Resolve a change request to promote the associated variance to a resolved state.

Effectivity

Effectivity is the planned date, lot, or serial number at which old part version are replaced with new part version in production. You can make changes to planned effectivity setting from a change notice or a change task. When the change notice has been approved, the planned effectivities get copied over as actual effectivities on the given object.

Objects that are effectivity managed include parts and the following Windchill MPMLink objects: process plans (manufacturing process plans, sequences, and operations) and manufacturing resources (plants, resource groups, skills, process materials, tooling, and work centers).

Note: Windchill MPMLink is a separate application that takes advantage of managing effectivity.

Effectivity set on a variance is description information only. No system processing occurs if you set effectivity on a variance.

For more information about effectivity, access the online help from the effectivity-specific tables.

Tracking Change Object Modifications

In order to track modifications to change objects, your administrator must enable the tracking changes preference (Change Modification Tracking). By default, this feature is not enabled.

If tracking changes is enabled, the following activities can be tracked:

- Problem reports -- clarification of the problem, the objects impacted by the problem, or a change in the supporting content.
- Change requests -- addition or removal of a problem report due to being grouped together with other problem reports that provide the basis for the change request, the objects impacted by the change request, or a change in the supporting content.
- Change notices -- undergoes the most amount of modifications once it has been approved. A change notice may require modification for the following reasons:
 - The addition or removal of a change request that is to be grouped together with other change requests that provide the basis for the change notice.
 - The addition or removal of change tasks that are associated with a change notice.

- The addition or removal of parts and documents affected by the change task.
- A change in the effectivity statements while the change notice is being implemented.
- A change in the supporting content of the change notice.
- Variances -- clarification of the variance, the objects impacted by the variance, or a change in the supporting content.

When you create a new revision of the change management object, the previous version becomes a historical version. You can view previous versions in the **Revision History** table.

When you view the information page associated with a change management object, the revision attribute is exposed only if the change management object supports a modification process. You will notice the **New Revision** action in the actions list, provided the latest version of the change management object is at a state where the tracking of modifications is desired, and you have proper access to initiate the modification.

Sample Change Process

The following is an example of the change process:

1. A user, who is a team member of a product, creates a problem report from a part information page.
2. The user assigned to the role of Change Administrator I in this product reviews the problem report and either approves or rejects it.
3. After Change Administrator I confirms the problem report (using a task in the **Assignments** table), Change Administrator I then writes a change request, performs an impact analysis, and records the decision for full or fast track implementation.
 - If the change request follows the fast track, it is immediately sent to Change Administrator II for implementation.
 - If the change request follows the full track, Change Administrator I convenes the change review board (CRB).
4. Change Administrator I records the CRB decision to either reject or proceed with the implementation of the change request. Upon approval, the appropriate Change Administrator II is assigned to create the change notice and the change notice tasks required to initiate the work of the implementation plan.
 - A full track change notice requires the approval of the change implementation board (CIB) prior to any actual work being performed. When approval is given, the work to implement the change may begin.

- Users assigned to the change notice tasks are responsible for editing the product data. For each task, the Reviewer then checks and approves the work of the assigned users before the task is complete.
5. When all the tasks in the change notice have been completed, Change Administrator III audits the resulting documentation to be sure it is clear, concise, and valid, and then approves or requests a rework of the change notice.

Change Monitor

The **Change Monitor** page allows you to gauge and monitor the status of the change objects (problem reports, change requests, and change notices) within your system. You can also view special reports as well as access all open problem reports, change requests, and change notices.

The **Change Monitor** page is available from the **Product**, **Library**, and **Change** tabs. When accessed from the **Product** or **Library** tabs, the scope is automatically restricted to the product or library being viewed and, therefore, only the relevant data is returned. When accessed from the **Change** tab, you can set the scope of the reports using the list of available scope options. The Change Monitor displays only those change objects that belong to products and libraries of which you are a team member.

For more detailed information about the Change Monitor, see the online help available from the **Change Monitor** page.

Note: Customized reports can be generated using the Report Manager. For more information, see [Reports](#) in the [Finding Information](#) chapter.

For each of the change objects, charts display information comparing the number of opened change objects to the number closed for each month during the last three months.

Below each chart is a link to all of the open change objects. For example, under the Problem Reports chart, the link is **Open Problem Reports**. The link displays a page listing all of the change objects which have not yet been resolved during the specific time period. The objects are organized by their creation date.

Also under each chart, the **Average Days Open** states the average number of days between the opening of a change object and its resolution. This information allows you to estimate how long it will be before a newly created change object is resolved.

The Full Track vs. Fast Track Changes chart displays the percentages of change requests that are assigned as full track or fast track and those that have not yet been assigned a track.

7

Associating and Relating Information

This chapter describes how to associate and relate contexts to contexts, objects to contexts, objects to objects, and objects with other information. In some cases, such as when using object structures, formal relationships are defined. In other cases, such as when using information tables, associations allow users to easily reference or navigate to related information.

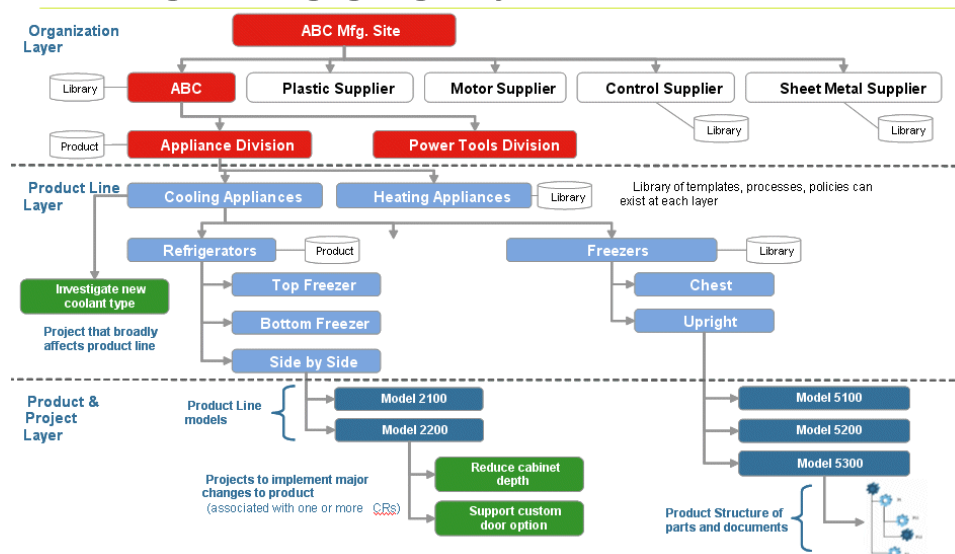
Topic	Page
Networks	7-2
Associating Objects with Contexts.....	7-4
Associating and Relating Objects.....	7-4
Product Structure Explorer	7-12
Product Structure	7-13
Document Structure	7-14
Part Structure	7-14
Configuration Specifications	7-15
Baselines.....	7-15
Notes.....	7-16
Attachments.....	7-17
Notebook	7-19

Networks

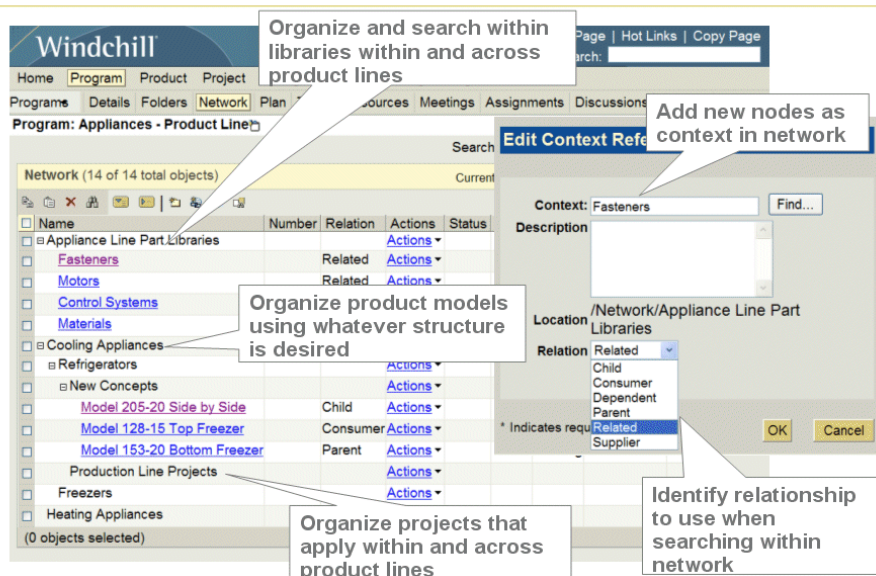
A *network* is used to organize information from various contexts throughout Windchill. Networks are displayed on the **Network** page on the **Product** and **Library** tabs if Windchill ProjectLink is installed along with Windchill PDMLink. From this page you can create and view a network structure stored in the current context.

The following graphics show an example of how you might use a network to manage large projects and product lines.

A Challenge of Managing Large Projects and Product Lines



Program Network of Products, Projects & Libraries



To create a network, a context manager creates a set of folders. Within each folder they create context references as well as links to files, web sites, or specific objects they want to include in the network.

Note: A folder in a network exists solely to organize a group of links, context references, and any subfolders in a network. It does not appear on the **Folders** page.

A *context reference* is similar to a link. In fact, you can add a context to the network by creating either a link or a context reference. Both allow users to navigate to the context; however, when you create a context reference, you define the relationship of the context you are referencing to the current context in the network using the **Relation** field. This attribute is used to sort and group information on the **Network** page.

Each context can have its own network. For example, a project referenced in the network of a specific program could have its own network of folders, context references, and links available on its **Network** page.

The structure of a network is completely arbitrary, meaning that the context manager can set up folders, context references, and links in any way that is meaningful or useful to them. The network can be reorganized at any time by moving, deleting, and adding new folders, context references, and links. There is nothing hierarchical about the context relationships in the network; the way that the objects are arranged in the network does not relate them in any way outside of the network.

Users can navigate through network structures by clicking links. They can also search for objects related to the context or search the network to find information across all referenced contexts. For more information on searching a network structure, see [Finding Information](#).

In addition to creating context references, network folders, and links for the current context, you can create them for contexts being referenced. For example, from the **Network** table in a program context, you can select a context reference to a project and click the new network folder icon on the toolbar to create a new network folder within the project.

Associating Objects with Contexts

Objects are automatically owned by the context in which they are created. The object can be shared to another context or associated with additional contexts, but only one context can own it. If an object is associated with a context through a network, only the context with the relation defined as Managed can own it.

You can associate an object with a context from the **Related Context** table. These associations appear in the **Related Contexts** table on the object information page. You can also add or remove associations from this table.

For information on sharing objects between contexts, see [Sharing Information](#).

Associating and Relating Objects

Some objects can be associated with other objects. For example, an action item can be associated with a Windchill document. This allows users to easily reference related information.

Some objects can be related to other objects. For example, a Windchill document can be related as a parent to another Windchill document in the document structure.

The methods for associating and relating objects are described in the following sections and vary depending upon the object types and purpose.

Action Items

Note: This section deals specifically with how action items can be associated with other objects. For more information about action items in general, see [Understanding Processes](#).

Action items can be associated with other types of objects, such as Windchill documents. This association is made automatically when you create the action item by using the **New Action Item** action on an object information page. Otherwise, you can associate an action item with an object by creating the action item from or adding it to the **Action Items** table on the object information page.

Note: When associating an action item with a part, document, CAD document, or dynamic document, the user creates an object version reference. That is, the action item is associated with a specific version of the object. This allows a separate set of action items to be created for each version of an object.

An action item can be associated with more than one object. For example, an action item to update a document could be associated with both a meeting and a Windchill document. However, action items can only be associated with objects owned by the same context.

Note: Action Items cannot not be associated with meetings created under **Home** tab.

Action item associations are displayed in the **Subject** column in the **Assignments** and **Action Items** tables. If more than one association exists, **(multiple)** displays. The user can view all associations from the **Subjects** table on the action item information page.

You can remove an action item association by using the **Remove** action on the **Action Items** table.

Part-to-Document Relationships

Note: This documentation describes part-to-document relationships in Windchill, assuming that no customizations have been made. Depending upon how your system has been configured, the behavior of part-to-document relationships may vary. For example, you may have the option to select the type of link you are creating or links may not carry forward automatically. For information on the configuration options that impact part-to-document relationships, see the *Windchill Business Administrator's Guide*.

You can create a part-to-document or part instance-to-document relationship from the part information page, document information page, Product Structure Explorer, or part structure. You can create a part instance-to-document relationship from the part instance and document information pages. Depending upon the type of the Windchill document or your system preference settings, either a describe link or a reference link is created. For example, if the document type is Reference Document, a reference link is created, unless the preference setting is set to allow users to choose, in which case you can create either a reference link or a describe link. Reference and describe links are described in detail later in this section.

All part-to-document relationships appear on the part information page under the **Related Objects > Documents** menu. Describe links appear on the **Described By Documents** table. Reference links appear on the **References Documents** table. These same relationships can be viewed from the document information page on the **Describes Parts** or **Referenced By Parts** tables or **Part Instances** and **Referenced By Part Instances** tables, shown in the following graphic.

[Actions](#) **Part - 0000000021, A.1 (Design)**

Name: Cast Concrete Stone Mold
State: In Work - Released - Canceled
Status: Working copy ([Go to Original Version](#))
Modified By: demo on 2007-07-11 14:00 CDT
Location: / [Combine Production](#)
[More Attributes](#)

Structure General ▾ **Related Objects ▾** History ▾ Collaboration ▾

Described By Documents (0 of 0 total objects) Current View: Default ▾

<input type="checkbox"/>	Number	Version	Name	Context	State	Last Modified
No Objects to Display (0 objects selected)						

References Documents (1 of 1 total object) Current View: Default ▾

<input type="checkbox"/>	Number	Version	Name	Context	State	Last Modified
<input type="checkbox"/>	0000000061	A.1	Concrete	Combine Production	In Work	2007-07-11 14:00 CDT
(0 objects selected)						

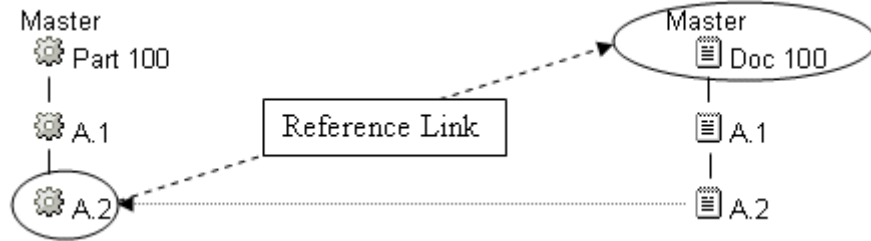
You can eliminate a part-to-document relationship by using the remove icon on the information page table where the relationship appears or by using Product Structure Explorer. If the part is checked out at the time you remove the link, the link is removed on the working copy and the part remains in a checked out state.

If the part is checked in at the time you remove the link, from the part information page Windchill automatically checks out the part, removes the link and leaves the part checked out. From the document information page, Windchill automatically checks out the part, removes the link, and checks the part back in, resulting in a new iteration of the part.

Note: Part instances are never checked out. They are automatically iterated by Windchill. For more information on part instances, see [About Windchill PDMLink](#).

Reference Links

A reference link always links to the master document.



Reference links always display a document version of the master based on the life cycle state rules for the document, which use Released as the default. For example, when you click the reference link for Part 100 version A.1, Windchill searches for the latest released version of Doc 100 to display. If no version of the document has been released, it displays the latest working version (in this case, Doc 100 version A.2).

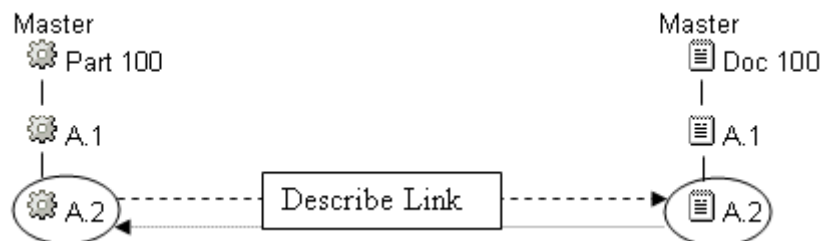
Reference links from a document to a part display the latest version of the part. Using the example shown above, when you click the reference link for Doc 100 version A.2, Windchill searches for the latest version of Part 100 to display.

The following table describes the behavior of the reference link when an action is performed on the part:

Action	Carries Forward Link	Comments
Check In Part	Yes	A working copy of the selected part is created when you check out the part; therefore, when the part is checked back in, the new version (iteration) carries forward the reference link.
Revise Part	Yes	
Save As Part	Yes	

Describe Links

A describe link links to the latest iteration of a document and vice versa.



The following table describes the behavior of the describe link when an action is performed on either the part or the document:

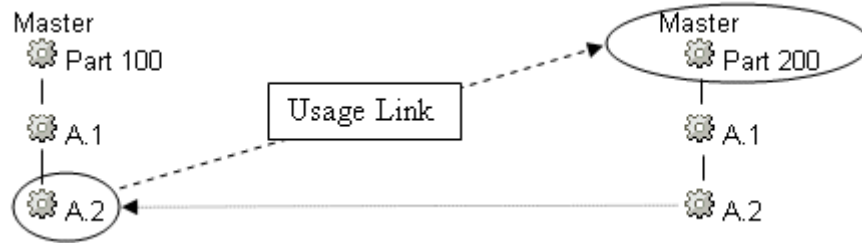
Action	Carries Forward Link	Comments
Check In Part	Yes	A working copy of the selected part is created when you check out the part; therefore, when the part is checked back in, the new version (iteration) carries forward the describe link.
Revise Part	Yes	A part iteration can only have a describe link to a single iteration of a document.
Save As Part	Yes	The newly created part links to the same document version as the selected version of the original part.
Check In Document	Yes	A working copy of the selected document is created when you check out the document; therefore, when the document is checked back in, the new version (iteration) carries forward the describe link.
Revise Document	No	
Save As Document	N/A	There is no Save As action for a document in the Related Documents table on a part information page.

Document-to-Part Relationships

In document-to-part relationships, the part is always the owner of the relationship. Therefore, even if you create the relationship from the document information page, the relationship is owned by the part and works as described for both non reference documents including their sub types and reference documents including their sub types under [Part-to-Document Relationships](#).

Part-to-Part Relationships

You associate one part with another by using the part structure or Product Structure Explorer. When you make the association, a usage link is created, forming a *uses* part relationship between a part and a part master.



You can view this parent-child relationship from the following locations:

- the parent part information page under the **Structure** navigation menu
- the child part information page on the **Where Used** table under the **General** navigation menu
- the **Uses** tab in Product Structure Explorer

While the parent part links to the master of the child part, part usage links display a version of the child part based on the current configuration specification for the product structure. For example, the product structure for a part with the current configuration specification of Latest displays the latest revision or iteration of the child part. For more information, see [Configuration Specifications](#).

The following table describes the behavior of the usage link when an action is performed on either the parent or child part:

Action	Carries Forward Link	Comments
Check In Parent Part	Yes	
Revise Parent Part	Yes	
Save As Parent Part	Yes	
Check In Child Part	No	A parent-to-child relationship is owned by the parent. Therefore, the link is only copied forward when actions are performed on the parent.
Revise Child Part	No	A parent-to-child relationship is owned by the parent. Therefore, the link is only copied forward when actions are performed on the parent.

Action	Carries Forward Link	Comments
Save As Child Part	Maybe	<p>When you create a new part from a child part using the Save As action, a new master is created with no relationship to the parent of the previous part.</p> <p>However, if you perform a Save As action on multiple parts at once, any relationships between the parts will be carried forward to the new parts.</p>

Note: Part occurrences are stored on the usage link between two parts. Therefore, if you remove the relationship, thereby deleting the link, you will also delete any part occurrences.

Alternates and Substitutes

Part relationships can also be created to indicate that parts can replace one another. An *alternate* for a part can replace a part in every product structure in which the part exists, while a *substitute* can replace a part only in one specific product structure. This relationship can be created either in the [Product Structure Explorer Replacements](#) tab or using the actions from the **Manage Replacements** action on the [Part Structure](#).

Document-to-Document Relationships

You can associate a Windchill document with another Windchill document in Windchill PDMLink. There are two types of document-to-document relationships:

- Reference documents
- Structured documents

Note: An attachment is a content source that can be associated with a Windchill document. Attachments do not exist as independent objects in the Windchill database; therefore, a document with an attachment is not considered a document-to-document relationship. For more information, see [Attachments](#).

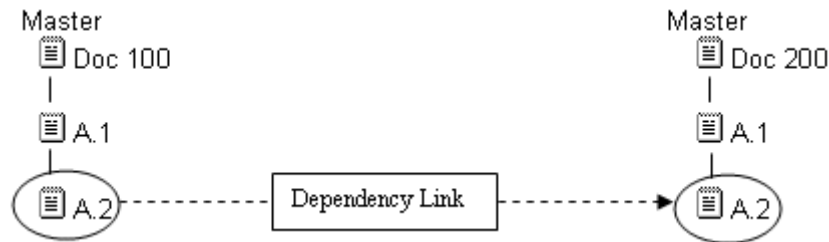
Reference Documents

A document can reference other documents, be referenced by other documents, or both. These associations are shown in tables on a document information page as follows:

- Documents referenced by the current document are shown in the **References Documents** table.

- Documents that reference the current document are shown in the **Referenced By Documents** table.

When you add a reference to a document on the **References Documents** table, you create a dependency link.



When you remove a reference to a document from the **References Documents** table, you delete the link and dissolve the relationship.

The following table describes the behavior of the dependency link when an action is performed on either the referencing document or the document being referenced:

Action	Carries Forward Link	Comments
Check In Document	Yes	A working copy of the selected document is created when you check out the document; therefore, when the document is checked back in, the new iteration of the document carries forward the dependency link with the related document.
Revise Document	Yes	
Check In Related Document	Yes	A working copy of the selected document is created when you check out the document; therefore, when the document is checked back in, the new iteration of the document carries forward the dependency link with the document from which it is referenced.
Revise Related Document	No	

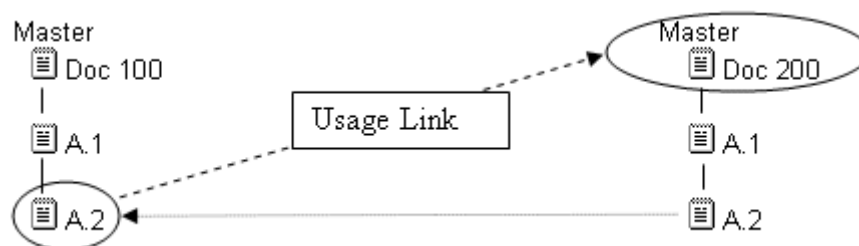
Structured Documents

A document can be related to another document as a parent-to-child relationship in the document structure.

When you add a document to the document structure as a child to another document, you create a usage link. This forms a relationship between the latest iteration of the original, or parent, document and the master of the associated, or child, document.

The current configuration specification determines the version and iteration of a child document to be used with a parent. For example, the structure for a document with the current configuration specification of Latest displays the latest revision/iteration of the child document.

You can view this parent-child relationship from the parent document information page under the **Structure** menu or from the child document information page on the **Where Used** table under the **General** menu.



Parent-child relationships for documents follow the same pattern as parent-child relationships for parts. That is, a usage link works the same way for documents as for parts. For examples, see [Part-to-Part Relationships](#).

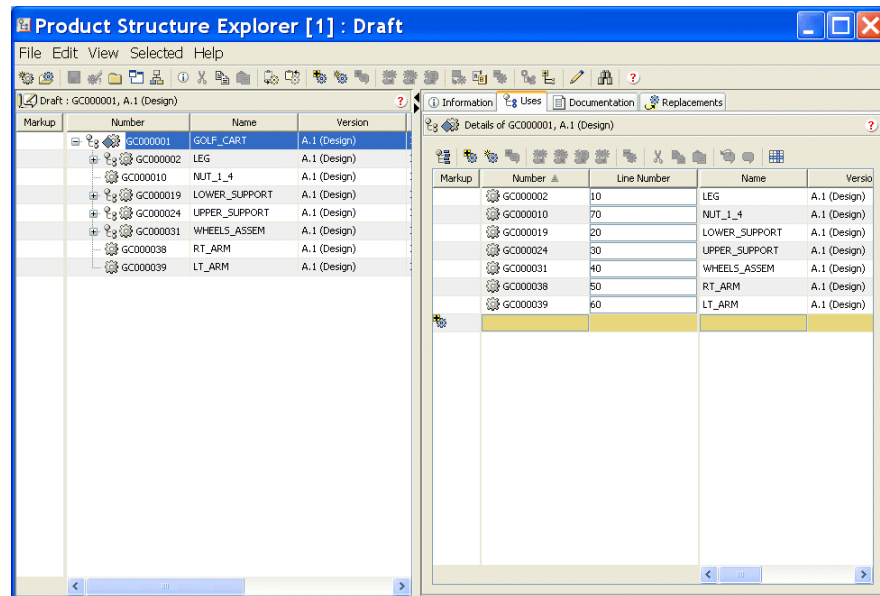
CAD Document-to-Part Relationships

You can associate a CAD document and a part in Windchill PDMLink using the workspace. There you have the option to manually associate a part to a CAD document using the **File > Associate** menu or you can select the action to associate parts and documents automatically. If you select the later option, a part is automatically created and linked to each CAD document you have uploaded to the workspace.

Product Structure Explorer

As explained in the [Windchill PDMLink Overview](#), Product Structure Explorer (PSE) is an application in Windchill PDMLink focused on structure authoring. The PSE functionality is especially useful when viewing and creating associations. As shown here, the **Uses** tab displays any parts used by the part selected in the left pane of the explorer window. For information on the parts

displayed, see [Configuration Specifications](#). Actions are also available under the **Uses** tab to add and remove the parts used.



Similarly, the **Documentation** and **Replacements** tabs contain that information related to the part selected in the left pane. For more information, see [Associating and Relating Objects](#) and the online help available from the PSE.

Product Structure

A *product structure* allows you to define relationships between Windchill objects. These relationships are reflected in a hierarchical table where each object uses the objects that appear below it in the hierarchy and is used by the objects above it.

In order to view the entire structure of a product, navigate to the **Details** page under the **Product** tab. From the **Details** page, you can view a list of end items created for the product. Select the information icon for the end item, and then select **Structure** from the navigation bar at the bottom of the information page. The end item is the top-most part, so you can view the hierarchy of all objects used in the structure.

As detailed in the section below, you can also view a structure from an object's information page; however, the structure displayed on an information page displays only the children of the selected object. Those objects at the same level or any level above the selected object do not appear. So to view the entire structure, you would need to navigate to the structure of the end item.

Document Structure

A *document structure* allows you to define relationships between Windchill documents. These relationships are reflected in a hierarchical table where each document uses the documents that appear below it in the hierarchy and is used by the documents above it. You can view the **Document Structure** table from the perspective of any Windchill document by selecting **Structure** from the navigation bar at the bottom of the document information page.

From the **Document Structure** table, you can add, remove, or reorder documents in the structure, thereby defining and modifying their relationships. Documents must already exist in Windchill before you can add them to the structure.

The information displayed in the document structure is filtered according to the configuration specification currently in effect. The configuration specification is described in the **Current Configuration** field above the **Document Structure** table. You can change the configuration by using the **Change configuration to** drop-down list. For more information, see [Configuration Specifications](#).

For more information on the relationships between documents in the structure, see [Document-to-Document Relationships](#).

Part Structure

A *part structure* allows you to define relationships between Windchill parts. These relationships are reflected in a hierarchical table where each part uses the parts that appear below it in the hierarchy and is used by the parts above it. You can view the part structure by selecting **Structure** from the navigation bar at the bottom of the part information page.

From the **Structure** table, you can add, remove, or reorder parts in the structure, thereby defining and modifying their relationships. Parts must already exist in Windchill before you can add them to the structure. For more information, see [Creating Objects](#).

You can expand a part structure (that is, expand each subassembly to see its child parts) until the lowest-level, component parts are shown. When you expand the part structure, you can specify the criteria by which the system will select and display versions of the child parts. The expansion criteria are called the *configuration specification*, which is displayed in the **Current Configuration** field above the **Structure** table. You can change the configuration by selecting an option from the **Change configuration to** drop-down list. For more information, see [Configuration Specifications](#). For example, you can set a configuration specification to select only those parts in the Released state, or parts that are unique to a specific product structure view, such as Manufacturing, which would show sub-assemblies created to facilitate product assembly.

Note: If there is no version of the part that matches the configuration specification, the part master is displayed. For more information on masters, see [Windchill PDMLink Objects](#).

For more information on the relationships between parts in the structure, see [Part-to-Part Relationships](#).

Configuration Specifications

A *configuration specification* defines the criteria for objects that are displayed to you in a structure. For example, the Latest configuration specification displays only the most recent iteration of all objects. You can also choose to view the objects based on a configuration specification for a certain life cycle state, such as Released. You also have the option to select a configuration specification for a baseline. You view configuration specifications in the [Document Structure](#), and you can select the configuration specification used to display either the [Part Structure](#) or [Product Structure Explorer](#).

Baselines

A *baseline* defines a revision and iteration-specific, static list of objects in order to preserve the status of the objects at a certain point in time. This list is not hierarchical, meaning no relationships among objects are displayed. Baselines are useful in situations where product development groups both inside and outside of a company must progress together on a common description of a product.

To create a baseline in standard Windchill PDMLink you, select **New Baseline** from the actions lists displayed for contexts. You can also create a baseline from a part information page by selecting the **Add to Baseline** action, which gives you the option to search for a baseline or create a new one. In [Product Structure Explorer](#), you select the part you want to add to a baseline, and select **Selected > Baseline > Add to Baseline**. By default, the following objects can be added to a baseline: parts, documents, CAD documents, dynamic documents, problem reports, change requests, change orders, and variances.

Once you have created a baseline, you can add and remove objects that reflect the product structure. Any number of baselines can be defined, and each baseline can include any number of objects. For more information, access the online help available from the baselines window.

Tip: To easily view the differences between two baselines, you can use the **Information Compare** action. For more information, see [Baseline Comparisons](#).

Default Baseline

When working with generic parts, you may need to work with a default baseline. If a managed baseline has been used during the promotion request process, once the approval process has been successfully completed, the managed baseline that was identified during the promotion process is designated by the system as the *default baseline* for the configurable generic part. Each revision of the configurable generic part may have many managed baselines, but the system can designate only one of these baselines as the default baseline at any given time. Thus, if a second managed baseline is created for the same top-most generic part

and referenced when the top-most generic part is promoted to another release level, the second managed baseline will be designated as the default baseline, removing this identification from the first managed baseline.

In addition, it may not be appropriate for some users within a company to view product structures that contain unreleased components or component versions. Thus, if the user profile setting **Select Configuration Specifications for Generic Parts** is enabled, the system automatically uses the default baseline when displaying the product structure for the top-most generic part (that is, the configurable generic part) and when configuring the configurable generic part to create a variant specification. If the system is unable to locate a default baseline, then only the identified generic part (or configurable generic part) is displayed (or configured).

For more information, see [Product Structure Explorer](#).

Notes

As mention in [Windchill PDMLink Objects](#), a *note* allows you to include additional design information for a part in an assembly. A single note can be associated with one or more parts, and a single part may have zero or more notes associated with it. Notes can be created based upon a defined template, allowing you to modify existing text and attributes, or you can create a note by entering the desired text and defining the required attributes from scratch.

To create a note, select **New Note** or **New Note from Template** from an actions list available throughout Windchill PDMLink. You can also click the note icons available on the **Notes** table.

The information you enter in the **Note Text** field, when creating the note, will be displayed in the **Structure** or **Related Objects** table as shown below. To modify the **Note Text**, select **Edit** from an actions list related to the note.

Structure General ▼ Related Objects ▼ History ▼ Collaboration ▼									
Notes (17 of 17 total objects)							Current View: Name and Number ▼ ?		
			Find Number	Name	Number				Note Text
				GOLF_CART	GC000001 ⓘ				
				Golf_Cart	0000000002 ⓘ				Note about Golf_Cart. Read thi... More

Once a note is created, you can associate it with a part. To do so, select **Related Objects > Notes** from the navigation bar of a part information page. Then select the add button.

To view notes related to parts you can also run a report. For more information, see [Reports](#).

Attachments

An *attachment* can be defined as any of the following kinds of supporting information:

- A local file uploaded to the server; for example, a Microsoft Word document, a text file, or a graphic
- A URL linking to content stored on a web site
- An externally-stored source of content that cannot be attached as local files or URL links; for example, highly-sensitive data stored in a secure location, or a three-dimensional object such as a product model or prototype




Note: Only certain kinds of attachments may be available to you. For example, if URL attachments are not enabled, then actions pertaining to URL attachments do not appear in the **Attachments** table.

Attachments are attributes on an object rather than separate objects; therefore, when you add an attachment to an object, the attached content can be viewed only from the information page of the object to which it is attached. If the object is revised, saved as a new object, or checked in, the attachment is carried forward as an attribute of the object.

Note: Only primary content attachments are supported in [Windchill Desktop Integration](#).

You can add, edit, or remove attachments while creating or editing the object to which they are attached. You can view attachment attributes, download file attachments, or open URL attachments from the **Attachments** table on an object information page as shown in the following graphic.

Attachments (3 total objects) ?

<input type="checkbox"/>	Label or File Name		Format	Attachment Description	Last Modified	Modified By
<input type="checkbox"/>	MixingInstructions.doc		Microsoft Word	Instructions for mixing concrete	2007-07-11 14:29 CDT	demo
<input type="checkbox"/>	Concrete Information		URL Link	Descriptions of all types of concrete	2007-07-11 14:29 CDT	demo
<input type="checkbox"/>	Concrete Samples		External Storage	Samples of concrete blocks	2007-07-11 14:29 CDT	demo

(0 objects selected)

You can access the Attachments table by clicking the **More Attributes** link in the attributes panel on an object information page or by selecting **Attributes and Content** from the **General** menu on the navigation bar at the bottom of the page. For more information about accessing information tables, see [Information Pages](#).

Primary Content for Windchill Documents

Primary content is the main attachment for a Windchill document. While a document can have multiple attachments, only one can be considered primary content. The following example shows a document with a file attached as primary content as well as three secondary attachments in the **Attachments** table.

The screenshot displays a Windchill document interface. At the top, the document title is "Document - 0000000024, A.1" with a state of "In Work". The document name is "Concrete". The primary content is "Concrete.xls", a Microsoft Excel file. The latest iteration is "Shortcut to Content". The status is "Working copy (Go to Original Version)". The modified by is "demo" and the last modified date is "2007-07-11 14:29 CDT". The location is "/ Building / Materials".

Below the document details, there are tabs for "Structure", "General", "Related Objects", "History", and "Collaboration". The "General" tab is selected.

The "Primary Content (1 object)" section shows a table with one row:

Label or File Name	Format	Attachment Description	Last Modified	Modified By
Concrete.xls	Microsoft Excel		2007-07-11 14:29 CDT	demo

The "Attachments (3 total objects)" section shows a table with three rows:

Label or File Name	Format	Attachment Description	Last Modified	Modified By
MixingInstructions.doc	Microsoft Word	Instructions for mixing concrete	2007-07-11 14:29 CDT	demo
Concrete Information	URL Link	Descriptions of all types of concrete	2007-07-11 14:29 CDT	demo
Concrete Samples	External Storage	Samples of concrete blocks	2007-07-11 14:29 CDT	demo

At the bottom, it says "(0 objects selected)".

You can add, edit, or remove primary content while creating or editing a document. You can replace the primary content of a Windchill document without editing any document attributes by using the **Replace Content** action. For example, if your primary content is a file attachment, you could update the file with a more recent version, replace the file with an entirely different file, or replace the file with a URL link or externally stored content. Windchill creates a new iteration of the document with the new primary content, without overwriting the primary content attached to previous iterations.

Note: Depending upon your site preference settings, primary content may or may not be required or you may not be able to remove primary content from a document once it has been added.

You can view primary content attributes, download a primary file attachment, or open primary URL attachment content from both the document attributes section and the **Primary Content** table on the information page for the document to which the content is attached. You can also view content using format icons. For more information, see [Document Content](#).

Attachment Preferences

How attachments are downloaded and uploaded are controlled by the following preferences located under the **Attachments** heading in the **Preference Manager**:

- Default File Path
- File Download Mechanism
- File Download Behavior
- File Upload Mechanism

For more information on setting preferences, see [Setting Up Your Environment](#).

Notebook

A *notebook* is a collection of links and files created and organized into folders and subfolders. You can link to either a Windchill object or a Web site outside of the boundaries of Windchill.


There are two types of notebooks:

- [My Notebook](#)
- [Object Notebooks](#)

The first time you view a notebook, it will contain the default folders and links that are set for your site or the specific context. You can create a link or upload files from your local machine by using the **Notebook** or **My Notebook** table toolbar. You can add links to Windchill objects to a notebook by using the **Add to Notebook** or **Add to My Notebook** action. You can organize these links into folders which are already established or create your own.

My Notebook

The **Notebook** page on the **Home** tab allows you to collect and organize links to information related to your work. For example, you can link to documents or other objects you are working on in various contexts.

A **Hot Links** link at the top of the main Windchill window provides quick access to your notebook. Click this link to open the notebook with all folders collapsed except the **My Hot Links** folder. The add to hot links icon  on the **Updates** and **Checked-Out Work** tables allows you to add a link to one or more objects to your **My Hot Links** folder.

Object Notebooks

The **Notebook** table on an object information page allows you to collect and organize links to information related to the object. It is similar to the **My Notebook** table on the **Notebook** page except that the objects and links relate specifically to the particular object and are visible by all users who have permission to view the object.

Note: When a new revision of an object is created, the notebook information is copied to the new version by default.

Adding a Windchill object to a notebook simply allows users to reference it. There is nothing hierarchical about the relationships between an object and the other objects referenced in its notebook; the way that the objects are arranged in the notebook does not relate them in any way outside of the notebook.

8

Sharing Information

This chapter describes the functionality within Windchill PDMLink that allows you to share information with your team to collaborate effectively.

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Subscriptions

Subscriptions allow individuals or groups to receive e-mail notifications when certain events or actions occur on an object. For example, if you want to keep track of changes to a specific document, you can subscribe to an event that notifies you whenever the document is checked in.

Depending upon the type of object to which you subscribe, one of the following processes occurs:

- The subscription is created. The **Subscribe** action for the object is replaced with an **Unsubscribe** action. Windchill sends you an e-mail notification each time certain actions occur on the object.
- A **Subscribe** window opens, allowing you to select one or more specific events for which you would like to receive notifications. When the event, such as a change in state, occurs for the object, Windchill sends you an e-mail notification.

Once the subscription is created, it appears on the **Subscriptions** page on the **Home** tab.

Context, Folder, and Object Subscriptions

You subscribe to contexts, folders, and various objects by selecting the **Subscribe** action which launches the **Subscribe** window. This allows you to subscribe to events for:

- a specific version of an object or all versions
- multiple objects at once, including different types of objects
- folders
- multiple folders at once
- a single context

You can create a subscription for yourself or you can subscribe on behalf of others, including groups. For example, if you want to receive notifications when a certain document is updated, you can set it up so that you receive notifications. If you belong to a group of people that will benefit from knowing the status of the document, you can set it up so that all members of the group receive notifications.

The events to which you can subscribe vary depending upon the type of object or objects selected and the Windchill solutions you have installed. For example, if a document is selected, only events for documents are listed. If documents and parts are selected, all events for documents and all events for parts are listed. For descriptions of the events to which you can subscribe, access the online help from the **Subscribe** window.

Tip: Folder subscriptions do not extend to subfolders. To receive notifications on objects in subfolders, you must subscribe to each subfolder separately.

All of your subscriptions appear on the **Subscriptions** page on the **Home** tab. Subscriptions for a specific context are listed on the **Subscriptions** table on the context **Details** page. Subscriptions for a specific object are listed on the **Subscriptions** table on the object information page. For information about a specific subscription, view the subscription information page. For more information about information pages, see [Viewing and Organizing Information](#).

From the **Subscriptions** table you can view, edit, cancel, or delete subscriptions. From the **Subscriptions** table on an information page you can create additional subscriptions. For more information, access the online help from the **Subscriptions** table.

Canceling or Deleting a Subscription

If you want to stop receiving notifications for a subscription, you can cancel your subscription by unsubscribing, unless you are subscribed as part of a group. For group subscriptions, someone who has the proper access permissions to the subscription must remove the group from the subscription or delete it in order for group members to stop receiving notifications.

If you unsubscribe yourself, another user, or a group from a subscription, the subscription remains active for any other subscribers. If you remove all subscribers, the subscription is deleted. Only someone who has the proper access permissions to the subscription can remove subscribers other than themselves or delete a subscription.

When you create a subscription, you can specify an expiration date. On this date, the subscription is deleted from the system. If no expiration date is specified, the subscription does not expire.

Notifications

When you create a subscription, you can indicate whether you want to send notifications for the subscription at the time the event occurs or according to a schedule. The schedule option allows you to have notifications stored and delivered in a digest on a daily or weekly basis at a specific time. This schedule is based on the Digest Notification Schedule preference set by users with administrative privileges.

For context or folder subscriptions, subscribed users receive notifications for all objects included in the subscription that are in the context or folder to which the user has access when the event occurs.

If multiple objects are affected, subscribed users receive a single summary e-mail notification rather than separate notifications for each object.

When you create or edit a subscription, you can enter a subject for the notification. If you leave the **Subject** field blank, Windchill generates it at the time the notification is sent.

Action Item Subscriptions

Note: This section deals specifically with how you can subscribe to action items. For more information about action items in general, see [Understanding Processes](#).

You can subscribe to an action item by selecting the **Subscribe** action. There are no further steps to be taken. Windchill PDMLink will send you an e-mail notification when the action item is resolved, edited, deleted, or obsolete.

Note: Regardless of any subscriptions, Windchill PDMLink also sends automatic e-mail notifications when an action item is assigned, reassigned, overdue, resolved, or deleted. For more information, see [Action Items](#).



All of your subscriptions appear on the **Subscriptions** page on the **Home** tab. From the **Subscriptions** table you can view, cancel, or delete subscriptions. For more information, access the online help from the **Subscriptions** table.


Note: Notifications are only sent for projects or programs that are running. For example, if a project or program is suspended or cancelled, no notifications are sent.

Discussion Subscriptions

Note: This section deals specifically with how you can subscribe to discussions. For more information about discussions in general, see [Discussions](#).

You can subscribe to receive e-mail notifications whenever a new topic or posting is added to the **Discussions** table for a context or object. Subscribe at the level for which you want to receive notifications. For example, to receive notifications for all topics and postings (including replies), subscribe at the discussion level by

clicking the subscribe icon  on the **Discussions** table toolbar. To receive notifications for all postings for a specific topic, subscribe at the topic level by clicking the subscribe icon  next to the topic name in the **Discussions** table.

Once you have subscribed, the subscribe icon is replaced with an unsubscribe icon , and the subscription appears in the **Subscriptions** page on the **Home** tab.

You can cancel a subscription and stop receiving e-mail notifications by clicking the unsubscribe icon or by deleting the subscription from the **Subscriptions** page. For more information on deleting subscriptions, access the online help from the **Subscriptions** page.

Tip: If you do not see the subscription icons for topics and postings, try changing your table view in the **Current View** drop-down field.

Meetings

Windchill PDMLink provides capabilities for scheduling and tracking the following types of *meetings*:


- **Standard** -- A meeting that includes an agenda, meeting participants, and the meeting details, such as date, time, and telephone information. This type of meeting supports those held in a single geographic location and those conducted in multiple sites over the telephone.
- **Web-based** -- A meeting that includes all the features of a standard meeting but is conducted through WebEx in order to share meeting presentations or other materials in real time. This meeting accommodates team members in multiple sites who all need to view the same materials at the same time.

Note: WebEx is not supported in the Korean language.

- **ProductView** -- A meeting that includes all the features of a standard meeting but with the ability to share two or more sessions of ProductView with meeting participants. This meeting enables team members in multiple sites within a firewall to conduct a meeting during which they need to view and mark up a CAD image over real time. ProductView peer-to-peer meetings allow different team members to take turns controlling the image, enabling real time collaboration. ProductView meetings do not require access to the Windchill PDMLink server after the session is initiated.

Note: To host or join a ProductView meeting, you must have ProductView installed on your system.

All meetings to which you have been invited are displayed on the **Meetings** page on the **Home** tab.

From the **Meetings** table, you can view existing meetings, create and cancel meetings, as well as perform a number of other actions, such as host or join a meeting. You can view information about a meeting by clicking the meeting name or by clicking the information page icon  for the meeting. The information page displays the meeting details as well as any meeting minutes or action items.

Note: Action Items cannot not be associated with meetings created under **Home** tab. For more information about associating objects, see [Associating and Relating Objects](#).

When you create, edit, or cancel a meeting, Windchill sends an e-mail notification to all meeting participants. To receive an e-mail notification for a meeting you create, you must include yourself as a participant. When you receive the e-mail notification, you may be able to automatically update your calendar by accepting the meeting, depending upon the type of calendar system you are using.

Tip: If you use your calendar system to make a change to a meeting that was created in Windchill, participants may be notified by the calendar system, but the Windchill meeting is not updated. You must edit the meeting in Windchill.

Discussions

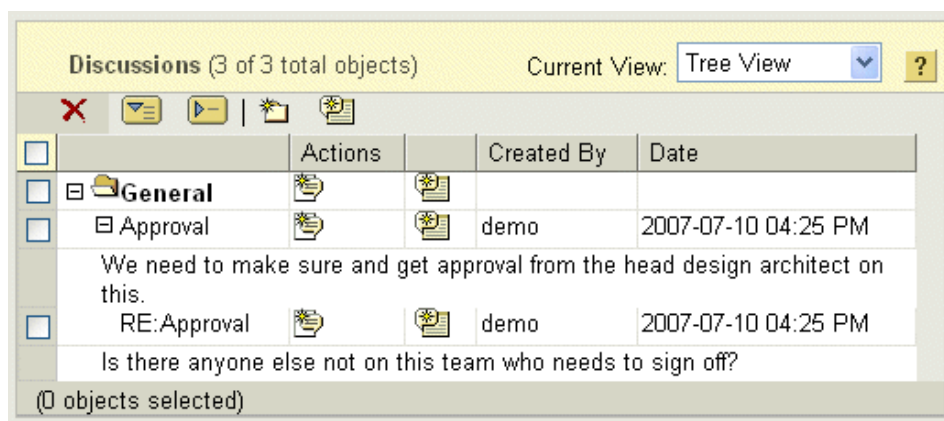
A *discussion* works like a message or chat board. It provides a space for team members to record the ongoing exchange of ideas that may otherwise occur over e-mail, in casual hallway conversations, or in impromptu meetings. Discussions are particularly useful to asynchronously engage in conversations by posting questions and answers among geographically distributed members that cannot meet in person or even via the telephone because of large time zone differences.

A discussion consists of a topic, or folder, which contains postings, or messages.

A *topic* is represented by a folder icon and determines the focus of the discussion. For example, if the topic is titled Design Ideas, then all of the postings beneath it should relate to Design Ideas.

A *posting* is a message from a team member concerning the topic. When you create a posting you can associate a Windchill object, such as a document, attach a local file, or add a URL to the posting for others to reference. After one posting is created, another team member can reply with comments specific to that posting, create a new posting related to the same topic, or create a new topic for the team to discuss.

The following graphic shows a discussion, topic, posting, and reply.



Discussions on a context level are displayed on the **Discussions** page for the context.

Discussions associated with a particular object are displayed on the object's information page by selecting **Discussions** from the **Collaboration** menu at the bottom of the page. If the menu option is not available, then the object type does not support discussions.

From the **Discussions** table, you can create topics or postings, reply to a posting, search postings, and subscribe to a discussion, topic or posting. Once you create a

topic or posting, it displays in the **Discussions** table and e-mail notifications are sent to any users who have subscribed to it. Users can subscribe to discussions at various levels. For more information, see [Discussion Subscriptions](#).

Tip: You cannot retract a topic or posting. Only context managers or users with administrative privileges can delete discussion topics or postings.

Windchill Clipboard

The Windchill *clipboard* allows you to cut, copy, and paste objects and URLs in the Windchill system. The clipboard must contain either objects, such as documents, or URLs, not both.

Once a URL is placed on the clipboard, you can paste a copy of the page. Once an object is placed on the clipboard with a cut or copy action, you can paste it. It will be moved either to a different location entirely (by using the **Cut** action) or create a copy in a new location (by using the **Copy** action).

A simple way to move an object within a single product, library, or project is to apply the **Cut**, **Copy**, and **Paste** operations. Both **Cut** and **Copy** move selected objects to the Windchill clipboard; the **Paste** operation determines whether the object will be duplicated, moved, shared, or checked out, based on the icon you select.

For example, within a product, library, or project, you can **Cut** one or more selected objects. The **Cut** operation moves an object from its current location to the clipboard. In order to complete the move, you can then **Paste** the object to a selected folder location.

Within a product, library, or project, you can also use the **Copy** and **Paste** icons to create a new copy of a selected object and either paste a copy of the original object to the selected location or paste the object as a shared object.

Note: When you complete a **Copy** and **Paste** operation within the context of a product, you have essentially completed a **Save As** operation. CAD documents can be copied within a product or library using an explicit Save As operation.

The Windchill clipboard can also be used to initiate sharing of information between a PDM system and a project in Windchill ProjectLink. For more information, see [Sharing Information Between Windchill ProjectLink and Windchill PDMLink or Arbortext Content Manager](#).

You can access the clipboard from the Windchill header. Objects that have been cut, copied, or pasted can also be viewed in the clipboard.

Sharing Information Between Windchill ProjectLink and Windchill PDMLink or Arbortext Content Manager

When you are working with integrated Windchill solutions, you can take advantage of common project management activities, such as the following:

- You can share data from a product or library within Windchill PDMLink to a project within Windchill ProjectLink. As a result, you can collaborate on the information in the context of a project, where your team's work can be managed through the use of milestones, deliverables, and resource tracking.
- You can copy or check out design information from a product or library to a project so that you and others can investigate design possibilities without committing your changes to formal PDM control. If you decide to make your new design or design changes part of your formal change process, you can check objects back into the PDM system.

Note: The **Copy** action is restricted to Windchill documents only.

- You can invite external participants to join your project, as project team members, without giving them access to your company's PDM system. For example, if you are collaborating on a new product design, you could invite an engineer from a supplier's company to participate in collaborative design work to be applied to PDM objects checked out to a project, without giving that engineer access to other PDM data or to your PDM system.

Only users assigned to the Collaboration Manager role for a context have change permission which is required to perform these tasks. When used in a project, the collaboration manager role allows a project manager to restrict access control to shared objects. When used in a product or library it allows users to share and check out objects from the product or library to a project. Because sharing is not allowed between a program and a product or library, the collaboration manager role does not apply for programs.

Making PDM Data Available to Your Project Team

When your site has installed multiple Windchill solutions on a server, you can use Windchill's clipboard mechanism to share or check out data from a product or library in your PDM system to a project (or from one project to another).

members to access only the subset of PDM objects required to complete the work assigned to the project team.

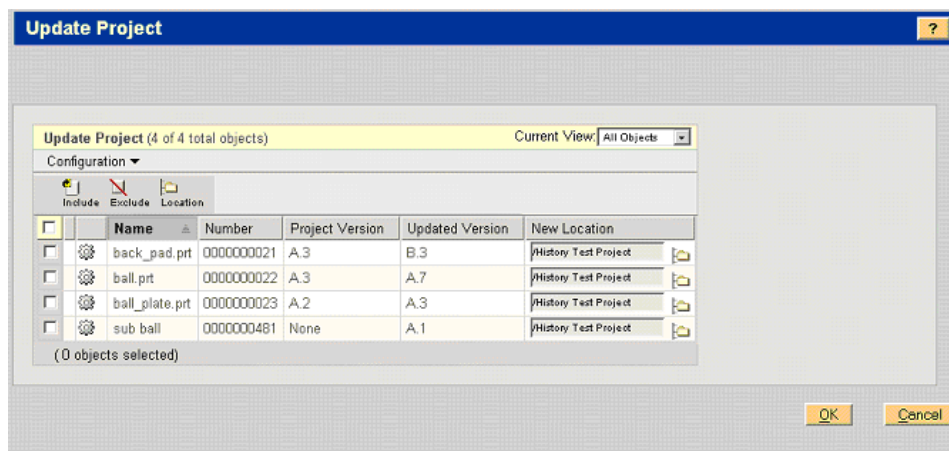
Updating a Project

When an object is shared from PDM to a project, the iteration defined during the **Add to Project** action is added to a project baseline. A user is able to share a set of objects using a specific configuration and later share another set of objects using a different configuration.

Over time, objects shared to the project may get iterated in PDM; the iteration in the project may no longer be the latest, or it may no longer adhere to the configuration specification originally used for sharing the object to the project. The update action is invoked from the project page and applies to all objects contained in the project baseline. The update action updates the project baseline with newer iterations of the shared objects from the PDM system. The new iterations are determined based on the configuration specification provided by the user at the time of the update. The iterations that were previously in the project baseline and are currently downloaded to workspaces continue to be shared. However, those iterations will no longer be used in subsequent downloads to workspaces.

Note: Only the project manager is allowed to update a project.

When you update a project, the new iteration for a given object may have dependant and related objects that were not part of the iteration originally shared. Therefore, the **Update Project** window includes filtering options that allow you to control the content of the table that displays the update candidates.



Note: When an object is shared, the entire version of the object is shared but the share link always points to the iteration that was initially specified during the share action or during the **Update Project** action.

Checking Out PDM Objects to a Project

When you use the **Copy** and **Paste** actions or the **Add to Project** action to check out, copy, or share a PDM object to a project, you first select the new location for the object.

Next, you choose whether to share the object or check it out to the project.

As previously described, sharing an object provides those project team members having access control privileges with read-only access to the original object. When you *check out* one or more objects from your PDM system to a project (or convert a shared object to a checked-out object), project-specific versions of those objects are created within your project. These project-specific versions can be modified by project team members, and the objects are locked in the PDM system to avoid concurrent modification and prevent synchronization problems.

You can also use the **Copy** and **Paste** actions or **Add to Project** functionality to create new objects with unique name and number attributes within a project.

When the copy is later sent to PDM, it does not affect the original object. However, when a checked-out object is sent back to PDM, the **Send to PDM** operation creates a new iteration of the original object.

Your project team can work with PDM objects checked out to the project as follows:

- Modify existing objects
- Create new objects
- Edit and change structures during the project design collaboration
- Reconcile all or a subset of the changes with the source PDM system by using the **Send to PDM** action.

Modifications to objects checked out from your PDM system are only visible to project team members, within the context of the project.

Using Actions and Icons

When you share or check out PDM objects to a project, the actions and icons available to you, as well as the results of the actions you apply, are based on the following object characteristics:

- The results of an action are determined by the type of the object you have selected. For example, when you create an object, the list of templates you can use for object creation is different for parts than for documents. Similarly, a change object can be shared to a project, but it cannot be checked out to a project, nor can a share relationship to a change object be converted to a PDM checkout.
- Actions differ based on whether an object is native to the current context, has been checked out to the current context, or has been shared. For example, if

you are working in a project and you apply the **Delete** action to a part created within that project (a native object), the part is removed from the project. If you **Delete** a part shared to the project from your PDM system, the action simply removes the share. If you apply a **Delete** action to a part checked out to the project from your PDM system, the action un-does the checkout and removes the object from the project. When you are working in your PDM system and apply **Delete** to a selected object, that iteration is removed from the PDM database.

- The actions and icons available to you when you have selected a specific object are determined by your access permissions to that object. You must have update access to a PDM object within the PDM system in order to check it out to a project or to convert it to a checked-out object when it has been shared.

You can also configure product and project spaces so that objects cannot be shared outside of that space. In this way, you can determine how broadly to share information by removing share privileges on all or selected objects, as appropriate.

Send to PDM

The **Send to PDM** operation allows you to bring objects from the project to the appropriate PDM contexts.

The objects that are eligible to be sent to the PDM system are either objects that have been checked out from the PDM system to a project or objects that have been created in the project.

During the **Send to PDM** operation, the system performs a dependency analysis and presents to the user a list of dependent objects that need to be checked into the PDM system at the same time. The list includes objects checked-out from the PDM system and modified dependents, as well as dependents newly created in the project. In order to maintain the integrity of the product structure, new dependents, as well as PDM checked-out and modified dependents, cannot be removed from the list.

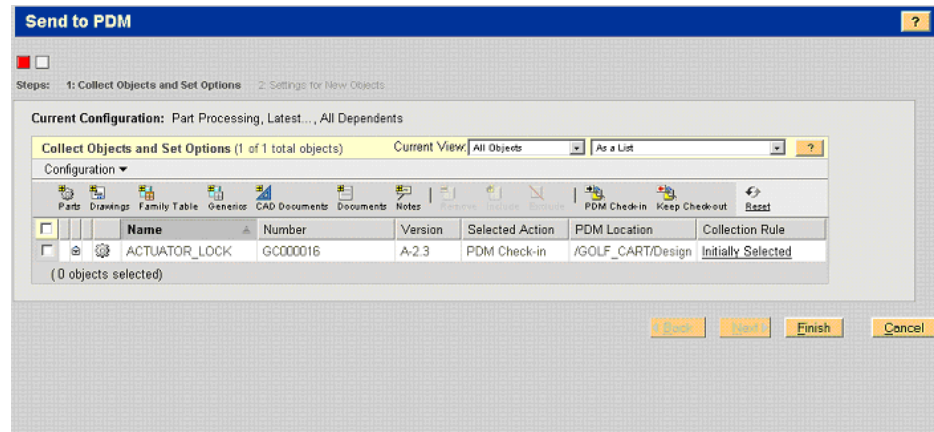
Note: The initially selected objects will always appear as included by default regardless of their status (modified or unmodified). Unmodified initially selected objects can be excluded from the list. Modified initially selected objects however cannot be excluded from the list.

In order to preserve the integrity of the product structure, you will not be able to exclude from the **Send to PDM** list the following objects:

- Objects newly created in the project and explicitly selected to be sent to PDM
- Objects newly created in the project and an instance of a family table
- Objects that are newly created in the project and are required dependents of a component being sent to the PDM system

- Objects checked out and modified in the project

The second step will only appear when newly created objects in the project are sent to a PDM system. In the second step, the user enters or edits the new number (based upon the numbering policy), new name or the new CAD filenames, in case of there are newly created CAD documents and their PDM locations.



Supported Objects

The following table identifies the list of objects supported by the interoperability operations:

Object Type	Source /Destination Context	Share	Access Control extendable (project to project only)	Object added to the project baseline (PDM to Project only)	PDM Check-out	Send to PDM
Part	Project/Project	Yes	No			
Part	PDM/Project	Yes		Yes	Yes	Yes
Generic Parts	Project/Project	No				
Generic Parts	PDM/Project	Yes		Yes	No	No
Variant Specification	Project/Project	No				
Variant Specification	PDM/Project	Yes		No	Yes	Yes
CADDocument	Project/Project	No				
CADDocument	PDM/Project	Yes		Yes	Yes	Yes
Dynamic document	Project/Project	No				

Object Type	Source /Destination Context	Share	Access Control extendable (project to project only)	Object added to the project baseline (PDM to Project only)	PDM Check-out	Send to PDM
Dynamic document	PDM/Project	Yes		Yes	Yes	Yes
Document (includes type, subtypes and subclasses)	Project	Yes	Yes			
Document (includes type, subtypes and subclasses)	PDM/Project	Yes		No	Yes	Yes
Notes (includes type, subtypes and subclasses)	Project/Project	No				
Notes (includes type, subtypes and subclasses)	PDM/Project	Yes		Yes	Yes	Yes
Problem Reports ECRs ECNs Change investigations Change proposals Analysis activities Variances (including type, subtype and subclasses)	PDM/Project	Yes		No		
Product Configurations Product Instances	PDM/Project	No				
Managed Baselines	PDM/Project	No		No	No	No
Project Link Folders	Project/Project	Yes	Yes			
PDM Folders	PDM/Project	No			No	No

Collaboration Example

The following is a scenario of how Windchill's integral capabilities could be used to collaborate on the redesign of an existing product.

1. A decision is made by a manufacturing company to enhance an existing product. A change notice specifying the required set of change activities is written.
2. The user who receives the change notice performs a revise operation on the objects identified in the change notice. The system creates the new revisions and they are associated with the change notice. The new revisions reside in the same location as the earlier revisions.
3. Because an external supplier will collaborate on the redesign, the decision is made to implement the change within a project, thus providing a central, yet isolated location in which to do the development. Selected information can be made available in the project while limiting exposure to related PDM data.

The project is created and team members from both the manufacturing company and the supplier are invited.

4. The members of the team check out to the project those objects that were revised for the change notice (in Step 2). This is accomplished in either of two ways:
 - The **Add to Project** operation
 - The **Copy** operation (in a PDM system), followed by the **Paste** operation (in the project folder)

Both actions open the **Add Objects to a Project** page, where members can select how to handle dependencies for the objects (that is, files on which the object may be dependent) and whether the objects should be shared to the project, checked out to the project, or copied to the project (a non-structured document only).

5. Team members create workspaces and associate them to the project.
6. Team members check out the necessary parts and CAD documents from the project to their workspaces. Only parts and CAD documents actually contained in the project can be checked out or downloaded to the workspaces, but this can include both objects that were checked out to the project (Step 4) and objects created in the project. Users can download to their workspaces the parts and CAD documents shared to the project.
7. Team members launch a Pro/ENGINEER (or any other CAD tool) session to use the CAD data checked out to their workspaces.

At any point in this process, team members may check out or download additional objects from the product to the project, and then to their workspaces.

8. As CAD work is complete, team members check the objects in their workspaces back into the project, causing new iterations of the objects in the project. Depending on how the project is set up, checking in a new CAD document could cause the corresponding part to also be iterated, but the part must be checked out to the project for this to happen.
9. Team members may continue to check out and download objects from the project into their workspaces, modify them in the CAD system, and then check them back into the project. As a result, many iterations of parts and CAD documents may accumulate in the project.

As a result of design work, team members may also create new parts, documents, dynamic documents, and CAD documents in the project. Relationships can be created between existing PDM objects checked out to the project and new objects created in the project.

10. When all CAD design work is complete, team members check their modified objects from the project into a PDM system using the **Send to PDM** operation. This operation checks in PDM objects that were originally checked out from a PDM system, and new objects that were created in the project. The operation opens the **Send Objects to PDM** page, where members can again select which dependencies to include for the objects and which actions to perform on the object.

The modified objects are now visible to the rest of the enterprise.

9

Understanding Processes

This chapter describes the data processes provided in Windchill PDMLink. These processes work together to help you manage data.

Topic	Page
Workflows	9-2
Assignments	9-2
Life Cycle Development	9-4

Workflows

A workflow is a series of pre-defined tasks that correspond to a business process in your organization. Workflows automate processes in which information, objects, and tasks are passed among participants. Depending on your role in these business processes, the workflow engine could deliver tasks that require you to review, author, or approve product data.

The **Assignments** table on the **Home** page displays all of the work items assigned to you, including workflow tasks. For more information, see [Assignments](#).

Assignments

Assignments are work items either directly assigned to you or to you in a particular role. The **Assignments** table under the **Home** tab displays the work items for which you are responsible, such as an owner, assignee, or resource. Assignments may include the following:

- [Tasks](#)
- [Action Items](#)

There is also an **Assignments** table that appears under each context tab (**Product**, **Library**, **Program**, or **Project**). This table lists all assignments related to a specific context.

Tasks

A task includes a work item that is part of an automated workflow process established by your administrator to efficiently accomplish business. Tasks also include change tasks that are established as part of an implementation plan of a change notice. For more information about change tasks, see [Change Management](#) in the Modifying Objects chapter.

For more information about the task that is assigned to you, select **View Information** from the **Actions** list in the row of the task. The task page displays the information you need to complete the assignment.

After you complete a task, click **Complete Task**. The task is then removed from your **Assignments** table, and the workflow process moves forward.

If an object is associated with the assignment, a link to the information about the object appears in the **Subject of Assignment** column of the table. From this page, you can view all available information for the object and perform actions on the object. In addition to displaying the link to the object within the **Subject of Assignment**, the work item task page may also include embedded information (for example, object information page, navigation menus on the lower portion of the information page, and so forth).

If you need to reassign the task or edit the due date, those options are available from the **Actions** list, in addition to accepting the assignment.

For more information, access the online help from the **Assignments** table.

If a task has been reassigned, then the record of the reassignment is listed in the **Reassignment History** table on the information page for the object.

You can access the **Reassignment History** table by selecting **Routing/Process** from the **History** navigation menu on the information page of the object associated with the task.

Action Items

Note: Action items can only be used in products or libraries when both Windchill PDMLink and Windchill ProjectLink installed.

An *action item* is similar to a task in that it records a job that needs to be done. However, where a task is generated automatically by workflows for routing, project or program management, and other processes, an action item is created manually by a user.

Action items capture issues that must be resolved or supporting work that must be accomplished either prior to or as part of a project or program but are not formally tracked in a plan. Although you can associate a risk value and risk description with each activity and deliverable in a plan, the risk value is not calculated from child to parent. Therefore, a better solution for capturing work associated with critical risks is to create action items and to define strategies for risk mitigation as part of the action item resolution.

You can create an action item from the **Assignments** page of the context in which you want to create it, or from the **Action Items** table on the information page for the object with which you want to associate it. For more information on associating action items with objects, see [Associating and Relating Information](#).

Action items appear on the following pages:

- Action items assigned to you or created by you appear on the **Assignments** page of the **Home** tab.
- Action items for a particular context appear on the **Assignments** page of the context.
- Action items associated with an object appear on the **Action Items** table on the object information page, as well as on the **Assignments** page.

Context managers, the action item creator, or the person to whom the action item is assigned can edit attributes for an action item, such as reassigning it to someone else or changing the state to **Resolved**. This is done by using the **Edit Action Item** window.

Note: Edit privileges for some fields may be limited by a person with administrative privileges by using the **Restrict Action Item Update** preference. For information on preferences, see [Setting Up Your Environment](#).

Only the context manager or action item creator can delete an action item.

Notifications

Windchill sends automatic e-mail notifications to users for action items. You are notified in the following situations:

- When an action item is assigned or reassigned to you.
- When an action item assigned to you is overdue, obsolete, or deleted.
- When an action item you created is overdue, resolved, obsolete, or deleted.

Note: When you resolve an action item, you do not receive a resolution notice unless you created it or have subscribed to it.

You receive additional e-mail notifications if you have subscribed to an action item. For more information, see [Action Item Subscriptions](#).

Note: Notifications are sent only for projects or programs that are running. For example, if a project or program is suspended or canceled, no notifications are sent.

Customizable Attributes

A set of customizable action item attributes can be exposed, hidden, reordered, renamed, and designated as required. For more information, see the *Windchill Business Administrator's Guide*.

Working with Action Items in Microsoft Excel

You can work with action items in Microsoft Excel by downloading a template, exporting data and importing it back to Windchill ProjectLink. For more information, see the [Action Items](#) section in the chapter [Importing and Exporting Information](#).

Life Cycle Development

In Windchill, the life cycle is the core capability to manage the maturity (that is, its life cycle state) of an object, as well as the access control policies for a set of roles in the system. Each object type in a Windchill PDMLink system can have unique sets of life cycle states and access control policies. Object initiation rules are used to designate which life cycle an object type is assigned when a user creates a new object of that type. Workflows associated with an object life cycle manage the maturing processes from state to state through workflow activity templates. When new versions of an object are created through the **New Revision** action, the life cycle state is determined by following the Revise transition from the current life cycle state or the first state if no Revise transition is defined for the current life cycle state.

For more information on creating life cycles and workflows or setting life cycle transition rules, see the *Windchill Business Administrator's Guide*.

Depending on several business considerations (for example, impact of change, development team, maturity of object, or type of object), it may be important to tailor the life cycle to include certain business operations and to define how these operations are executed.

For example, a development team in the automotive division of a company can have different review processes for releasing a design specification than the industrial products division. The automotive division may require a prototype to be created for a new product before the first production versions of the product are released. Formal change processes are required to update these prototype designs. After a part has been initially released to production, new versions of the design are designated as Production Change, and they must undergo a formal change process.

Using a set of transition rules, companies can define appropriate sets of business processes for the stage of development for that object. For example, the processes for developing an object can be informal in the early stages of development, but require more formal processes if the object is introduced in production.

Windchill PDMLink provides a variety of business processes that can be used to mature different types of product development deliverables. They include the following:

- **New Revision** -- Enables you to create a new version of the object. Transition rules can be set up to control the life cycle state of the new version based on the state of the version being revised.
- **Set State** -- Enables you to informally set the life cycle state of an object. This action is always available for administrators and context managers; however, depending on the transition rules, it may or may not be available for users.
- **Change Management** -- Enables you to release product development objects through a change process. Depending on the transition rules, this may or may not be available.
- **Promotion Request** -- Enables you to set the state of one or more objects to a new life cycle state with a selection of review processes. Depending on the access control rules, this action may or may not be available. You are able to promote only objects that have a valid Promote transition defined from the current life cycle state.

Promotion Request Process

A promotion request is a request to move an object to another state in the life cycle. Windchill PDMLink, by default, provides the following two processes for promotion requests:

- **Promotion Request Approval Process**

- Promotion Request Review Process

Each process has a set of tasks and roles associated with it. You can choose the process and add team members to the roles when you create a promotion request.

The creator of a promotion request can delete the promotion request only if it is Rejected or Under Review.

Note: Depending on your site configuration, the processes available for promotion requests may differ. It is possible to define additional processes to be available based on the selected target state for promotion. For more information on defining processes, see the *Windchill Business Administrator's Guide*.

Promotion Request Approval Process

The Promotion Request Approval Process is designed to send the promotion request through a review in order for the promotion to succeed. Team members assigned to the role of Approver are required to review the promotion request and then choose to either approve or deny it. The promotion request then follows the process until all approvers have completed their reviews. If all approvers choose to approve the request, the state of the objects is promoted to the specified state. If any approver chooses to deny the request, the process sets the promotion request to rejected, and the objects' states remain unchanged or return to the original state (if they were locked by the process).

Promotion Request Review Process

The Promotion Request Review Process is designed to change the state of the selected objects and notify specified team members that the promotion has occurred. Assigned team members have the option of reviewing and commenting on the changes, but no one is required to complete a task and the process does not depend on anyone's approval or rejection.

10

Importing and Exporting Information

This chapter describes the functionality within Windchill PDMLink that allows you to exchange information with applications outside of Windchill.

Topic	Page
Parts and Product Structure Data.....	10-2
Action Items	10-6

Parts and Product Structure Data

Windchill PDMLink supports the ability to export and import product structures and parts using Microsoft Excel spreadsheets (XLS). Use the **Export** action on a part **Information** page or **Search Results** table to export data. Use the **Import from Spreadsheet** action on the product or library **Details** page to import data.

This method of export and import is useful for exchanging data with an external partner or for updating part data or a product structure in a bulk process.

Exporting Parts and Product Structure Data to Microsoft Excel

You can export data from Windchill PDMLink to a Microsoft Excel spreadsheet. After you export a spreadsheet, you can modify the spreadsheet and import it back into Windchill PDMLink.

You can export the following types of data:

- Product structure

For example, a manufacturing engineer needs to send a product structure to a supplier for review. The manufacturing engineer sets the configuration specification and the sourcing context for the product structure, exports it to a spreadsheet, and sends it to the supplier.

- Part list

For example, a component engineer may need to modify part attributes for a large number of parts that belong to a particular supplier. The component engineer finds all parts from that supplier and exports them to a spreadsheet. The component engineer then opens the spreadsheet in Microsoft Excel and modifies the part data. Once updated, you can import the spreadsheet back into Windchill PDMLink.

When you export parts or product structures from Windchill PDMLink to Microsoft Excel, consider the following:

- Exported spreadsheets are saved with the XLS extension.
- Exported spreadsheets can contain multiple worksheets, each for a different classification node and part type.
- The first cell of a worksheet defines the type of data that was exported. If you plan to import the spreadsheet back in Windchill, do not modify the first cell of the top row of a worksheet.
- Row 5 of the exported spreadsheet contains the display names of the attributes included in the worksheet.
- When you use the **Export** action from a search results table, all parts in the table are exported to a spreadsheet.

- Classified parts that share a common classification node are exported to the same worksheet and that worksheet is assigned the name of the classification node.
- Different part types, for example, manufacturer parts and vendor parts, are exported to separate worksheets, even if they belong to the same node in the classification structure.

Importing Parts and Product Structure Data from Microsoft Excel

You can import part and product structure data from a Microsoft Excel spreadsheet into a library or product. Importing allows you to build product structures from existing parts, create new parts, or update existing parts using data in the import spreadsheet.

You can import the following types of data:

- New parts or modifications to existing parts. For more information, see [Importing Parts and Product Structure](#).

For example, a component engineer receives a spreadsheet from a vendor with updated part data for a particular manufacturer. The spreadsheet contains both new parts (replacement for obsolete) as well as modifications to existing parts (for example, changes to the life cycle status or environmental regulatory compliance data). When the component engineer imports the spreadsheet, new parts are created in the target library or product, and modified parts are iterated.

- A new bill of materials (BOM) or modifications to an existing BOM. For more information, see [Importing Bills of Materials \(BOMs\)](#).

For example, a Design Engineer may need to send a completed design to an external manufacturing partner for review. The Design Engineer exports a product structure to a spreadsheet and sends it to the Manufacturing Engineer. The Manufacturing Engineer reviews the spreadsheet, makes changes, and sends it back to the Design Engineer who can then import the modified spreadsheet back in Windchill PDMLink to create a new Manufacturing view of the BOM.

When you export parts or product structures from Microsoft Excel to Windchill PDMLink, consider the following:

- You can import a spreadsheet with multiple worksheets.
- In Row 1, the first cell contains a string that defines the type of data to be imported:
 - For parts: **ImportSheetType=PART**
 - For a BOM: **ImportSheetType=BOM**

- Rows 2 through 5 of each worksheet are reserved for comments. If you previously exported the spreadsheet from Windchill PDMLink, row 5 may contain logical IDs for the attributes included in the spreadsheet.
- Row 6 contains column headers.
- Rows greater than or equal to 7 contain the data to be imported.
- The order of columns in the spreadsheet is not fixed.
- If you want to exclude one or more worksheets from import, leave the first cell of the worksheet empty or change the value for ImportSheetType, for example, set it to ImportSheetType=NONE. A worksheet that does not list the correct value (PART, AXL, or BOM) will be excluded on import.

Before you import a spreadsheet, it may be helpful for you to review sample Excel spreadsheets to ensure you formatted your import spreadsheet correctly.

Sample import files are provided with the installation of Windchill Supplier Management and are located at:

- <http://<hostname>:<port>/<WindchillAppl>/examples/xls/part-import-template.xls>
- <http://<hostname>:<port>/<WindchillAppl>/examples/xls/bom-import-template.xls>
- <http://<hostname>:<port>/<WindchillAppl>/examples/xls/axl-import-template.xls>

Note: The URL for sample spreadsheets may also begin with https://.

Importing Parts and Product Structure

When you import parts from Microsoft Excel to Windchill PDMLink, consider the following:

- For more information on the spreadsheet format, see [File Format for Importing Parts and Product Structures](#) in the appendix [Microsoft Excel File Formats for Importing Parts and Product Structures](#).
- If you are unsure of the format to use for your import spreadsheet, export a part that has the required attributes and use the format of the exported spreadsheet.
- When you import, you can import new parts and modify attribute values of existing parts.
- If you modify existing parts, the parts are iterated. If you modify the soft attributes of a part, the soft attribute definitions must exist in Windchill PDMLink or the import will fail.
- If any related parts are checked out, the import will fail.

- If the column names do not match the Windchill PDMLink attribute names that you want to specify, the import fails.
- If you do not specify attributes in the import spreadsheet, object initialization rules are used to assign any attributes to the parts.
- You must include the organization ID of the supplier organization for manufacturer and vendor parts (for example, a name, DUNS number).
- If you want to import part classification attributes, each worksheet must contain only parts that belong to the same part type (for example, only manufacturer parts) and classification node. To import classification attributes, the classification structure used in the spreadsheet must exist in Windchill.
- When you import parts, you choose one of the following import actions

Action	Description
Add and Update	If a part exists, it is iterated and updated to the attribute values in the spreadsheet. If a part does not exist, a new part is created.
Update Only	If a part exists, it is iterated and updated to the attribute values in the spreadsheet. If a part does not exist, no action is taken.
Add Only	If a part exists, no action is taken. If a part does not exist, a new part is created.

Importing Bills of Materials (BOMs)

When you import BOMs from Microsoft Excel to Windchill PDMLink, consider the following:

- For more information on the spreadsheet format, see [File Format for Importing BOMs](#) in the appendix [Microsoft Excel File Formats for Importing Parts and Product Structures](#).
- When you import a BOM, a new baseline is created for each worksheet. If you specified the name for the baseline, it is prefixed with the worksheet number. If you do not specify a name, the baseline is assigned a name using the following syntax:

<name>-<year><month><date><hour><minute><seconds>

where *<name>* is the file name of the import spreadsheet without the extension.

For more information, see [Baselines](#) in the chapter [Associating and Relating Information](#).

- Imported BOMs must reference parts that already exist in Windchill PDMLink. If a part referenced in the BOM does not exist, import fails.

However, if you need to import a BOM with parts that do not exist in Windchill PDMLink, you can import one spreadsheet with both the new parts and the BOM. To ensure the import does not fail, make sure the worksheet with new parts precedes the worksheet with the BOM information.

- If an import spreadsheet contains both new parts and BOM information, do not select to validate the spreadsheet or validation will fail. You can skip the validation step and import the spreadsheet successfully.
- If you import a modified BOM, existing product structure links that are not included in the import spreadsheet do not change.
- If you create a new BOM, each row in the worksheet describes the **Add** action. If you modify an existing BOM, each row in the worksheet describes either the **Add** or **Delete** action.
- To import subtypes (modeled or soft) of a part, you must specify the subtype in the **Part Type** column of the input spreadsheet. You can use additional columns to specify attributes of each subtype.
- When importing a BOM, you can include reference designators in the input spreadsheet under the **Reference Designators** column. An import error occurs if the values in the **Reference Designators** column do not match the numbers in the **Quantity** column.

Action Items

Note: This section deals specifically with how you can work with action items in Microsoft Excel. For more information about action items in general, see [Understanding Processes](#).

Actions on the **Assignments** and **Action Items** tables allow you to work with Windchill PDMLink action items in Microsoft Excel. Specifically, they allow you to perform the following tasks:

- Capture action items in a single file to be imported into Windchill PDMLink.
- Download action item data, edit it off-line, and import changes to Windchill PDMLink.
- Download action item data for use outside Windchill PDMLink. For example, you might download action items to be printed, included in an e-mail message, or embedded in a report.

Note: Microsoft Excel/Office versions 2000 and earlier are not supported.

When you perform a **Download Template** action, Windchill PDMLink generates an XML spreadsheet based on a template. The template determines the format of individual cells and pre-populates drop-down lists based on the context from which it was downloaded. The template itself cannot be modified. The Microsoft Excel XML spreadsheet generated upon download contains the following instructions and guidelines for use in the **Instructions** worksheet:

- The spreadsheet contains pre-populated drop-down lists for some fields such as **Assignee** and **Status**, based on the context from which the template was downloaded. In those fields, select an option from the drop-down list.
- If the spreadsheet contains action items downloaded from Windchill PDMLink, it will contain a **Number** column that links to the action item information page in Windchill PDMLink. For new action items, leave the number blank. This is a system-generated number that will be assigned upon import.
- You can create a new action item by copying an existing one. However, you must clear any previous action item number from the **Number** column in the new action item row. The number is generated upon import.
- If you want to change the file name, enter it inside quotation marks (for example, "My Project - Action Items.xls"). The quotes indicate that the file is not in the native Microsoft Excel XLS format even though it has that extension.
- Do not change the file type. You must save Microsoft Excel files in XML Spreadsheet format to import into Windchill PDMLink.
- To create action items for a particular context, download the template from the **Assignments** page for that context.
- When you download existing action items from Windchill PDMLink using the **Export Action Items** action, the file generated is not intended for editing. You can edit the data in the spreadsheet; however, if you edit action items that you do not have privileges to modify, the import will fail. If you are not sure which action items you have privileges to modify, download a new spreadsheet using the download action items for editing icon.
- When you download existing action items from Windchill PDMLink using the download action items for editing icon, only the action items you have privileges to modify are downloaded.
- When you download existing action items from Windchill PDMLink using the download action items for editing icon, some fields, such as **Created** and **Created By**, cannot be modified.
- If you leave the **Assigned** field blank for any action items, Windchill PDMLink assigns them to the user who performs the import.
- Any information added to fields that are system-generated, such as **Number** and **Created**, is ignored.

- Any changes you make to cell formatting are ignored when the spreadsheet is imported into Windchill PDMLink and are not reflected in future downloads.
- You can unprotect the spreadsheet in order to sort, filter, or otherwise manipulate the display for viewing or printing purposes. To do this, from the **Tools** menu, select **Protection > Unprotect Sheet**. However, if you want to make edits and import the data to Windchill PDMLink, you must protect it again using the **Tools > Protection > Protect Sheet** menu options with no password. If you import an unprotected spreadsheet, all action items are treated as new upon import and may result in the creation of duplicate action items. Even if you protect the spreadsheet again, if you have made modifications, such as changing the column order, the import will fail.
- You can rename, reorder, designate as required, and expose or hide customizable attributes which will be reflected in the spreadsheet when the template is downloaded. See the *Windchill Customizer's Guide* for more information.

A

Microsoft Excel File Formats for Importing Parts and Product Structures

File Format for Importing Parts and Product Structures

The following table defines the format of data in a parts import spreadsheet. It defines the column header, whether or not the column is required and the description of the data that can be entered under that column for each row of data.

Column Header	Required	Description
Type	Yes	Class type, logical identifier, or an external type ID. For example: for OEM parts, use: wt.part.WTPART for manufacturer parts, use: com.ptc.windchill.suma.part.ManufacturerPart for vendor parts, use: com.ptc.windchill.suma.part.Vendor Part
Name	Yes	Part name.
End Item	No	Indicates whether or not the part is an end item.
Trace Code	No	An attribute that defines how a particular copy of a part will be identified after it is built. The following are allowable trace codes: Not Traced, Serial Number, Lot Number, Lot/Serial Number, Date.

Column Header	Required	Description
Generic Type	No	An attribute that designates if the part is generic, meaning a placeholder in a product structure for a group of similar parts when a specific part has not yet been selected.
Number	Yes	The default value may be autogenerated based on the destination location of the parts.
Assembly Mode	No	Can be separable, inseparable, or component.
Location	No	The folder path to a target container. Default value is the root folder of the container where the action was initiated.
Organization ID	No (for OEM parts) Yes (for supplier parts)	If not specified, the owning organization is set to the organization associated with the current container. It determines the organization to which the part is associated.
Revision	No	If a revision is not specified, the default starting revision is used. For example, if the part version is A.3 Design, "A" indicates the revision of the part.
View	No	The view to which this version is assigned. The default is not to assign a view.
State	No	Life cycle state of the part.
Source	No	Allowed value are Make , Buy , or Buy - Single Source .
Default Unit	No	Allowed values are ea , as_needed , kilograms , meters , liters , square_meters , cubic_meters . Note: Your administrator may change out-of-the-box units.
Job Authorization Number	No	Attribute designating the project authorization number used in Windchill Aerospace and Defense Module.
Contract Number	No	The contract or problem report against which an object is created used in Windchill Aerospace and Defense Module.
Phase	No	Captures the phase related to authorization to perform work used in Windchill Aerospace and Defense Module.

Column Header	Required	Description
Classification Path	No	The path to the classification node. For example: /Mechanical/Bearing/Radial
Additional attributes or classification attributes	No	Any soft attributes (including classification attributes) required for the part. Note: The order in which attributes are listed in the spreadsheet is not important.

File Format for Importing BOMs

The following table defines the format of data in a BOM import spreadsheet. It defines the column header, whether or not the column is required, and the

description of the data that can be entered in that column for each row of data.

Column Name	Required	Description
Action	Yes	Actions include Add or Delete .
Level	Yes	The level of the component in the part structure hierarchy. For example if part_1 had children part_2 and part_3, and part_3 had a child part_4, the level for each part is specified as follows: for part_1, level is 0 for part_2, level is 1 for part_3, level is 1 for part_4, level is 2
Number	Yes	The part number.
Trace Code	Yes	Enumerated type value
Organization ID	No	The owning organization for the component part. The default value is the organization from the owning container. Caution: Organization ID is required if you want to import parts that do not belong to the target organization.
Container	No	The default value is the container from which the import tool was launched.

Column Name	Required	Description
Revision	No	If a version is not specified, the default starting version is used. For example, if a version of the part is A.3 Design, "A" reflects the revision of the part.
View	No	The view to which this version is assigned. The default is not to assign a view.
Quantity	No	The default value is 1. Defines the number of parts in the assembly.
Unit	No	Quantity unit for the parts in the assembly. The default value is ea .
Reference Designators	No	<p>Reference designators specified using shorthand format (for example: R1, R3, or R1-R10).</p> <p>Use the following syntax rules for specifying reference designators:</p> <ul style="list-style-type: none"> • A reference designator consists of an alpha-numeric string prefix, followed by a numeric integer suffix. For example: R57, PS1, A66A2. • The first and last characters in the prefix must be alpha characters. For example: R1, RAX3, R4X5. • Use a comma to separate sequences of reference designators. For example, R1, R2, R7. • Reference designators can be specified as a sequence and as a range. For example: R1-R7, R10, R12.
Type	No	The only link type supported is the wt.part usage links.
Component Reference	No	Alias for the component
Quantity Option	No	Integer value parameter in the parent generic part's logic base that controls the quantity of this component
Inclusion Option	No	Boolean value parameter in the parent generic part's logic base that controls the inclusion or exclusion of this component

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