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PTC Product Focus

Design Animations: What Are They and How Do I Use Them?

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PTC Product Focus

Using User Defined Workflows in the Promotion Process

The Promotion process in PDMLink is used to accomplish two objectives.

1. It advances the lifecycle state of an object
2. It allows the objects to go through an approval or review process prior to the lifecycle change.

To accomplish these tasks, PDMLink uses a workflow. The system comes with two workflows pre-defined for use with promotions, but can be changed using the *Promotion Preference Manager*. In PDMLink 9.1 the *Promotion Preference Manager* allows companies to select a user specified workflow to drive their promotion process. Additionally a different workflow may be used depending on what lifecycle state you are transitioning to. A simple review workflow may be used early in the design process while a more complex release authorization workflow may be used to move to production.

The Promotion Preference Manager is accessed from the Site Utilities Page:

System Administration Search within this site:

- [Calendar Management](#) Provide the ability to schedule non-working days and delegate work.
- [ClearCase Adapter Administration](#) Manage ClearCase adapters and context associations.
- [Export/Import Manager](#) Manage the exchange of file data and metadata with other systems via XML files.
- [External Storage Administrator](#) Manage external file vaulting configurations, rules, and scheduling.
- [File Server Administrator](#) Set up file server sites, vaults, and folders, create/update replication rules, and schedule replication sessions.
- [File Server Manager](#) Download light-weight file server installers and manage file servers.
- [Info*Engine Administrator](#) View, create and modify directory service entries
- [Personal Cabinets Administration](#) List the set of personal cabinets whose users have been deleted and delete those personal cabinets.
- [Purge Manager](#) Create and manage purge jobs.
- [Queue Manager](#) Manage background queues and queue entries.
- [Server Status](#) Provides an overview of the status of key server processes.
- [Task Delegate Administrator](#) Create and manage task delegates and delegate repositories within the Aphelion directory.
- [Worker Agent Administrator](#) Display the status of CAD / Document workers and allows you to start, stop, and configure them.

Business Administration

- [Classification Administrator](#) Create, manage, and view classification structures and the associated classification attributes and constraints.
- [Manage Distribution](#) Manage distribution targets used by ESI.
- [Enterprise Systems Transaction Administration](#) View and edit the transaction history of published object.
- [Life Cycle Administrator](#) Create and manage life cycle templates used for defining the phases and transitions of various business objects.
- [Numbering Schemes Administration](#) View information on how to control numbers generated for objects.
- [Object Initialization Rules Administrator](#) Create and manage XML rules for object initialization that set default values for attributes and display characteristics that constrain attribute values.
- [Policy Administrator](#) Manage administrative domains and the access control, indexing, and notification policies.
- [Preference Manager](#) View and set preferences.
- [Principal Administrator](#) Support creation and maintenance of Windchill business objects describing users, groups, and organizations.
- [Promotion Preference Manager](#) View, create, and edit promotion preferences.
- [Publish and Thumbnail Control](#) Controls the generation of visualization objects.
- [Publish Monitor](#) View the status of Visualization publish jobs.
- [Publish Scheduler Administrator](#) Create and execute publish jobs.
- [Report Manager](#) Create, update, and delete reports using the QueryBuilder tool. A report is the output of a predefined search and is used for generating statistics and metrics against business information.
- [Team Administrator](#) Create and manage team templates. When creating a life cycle-managed object, you can use a team template as a base for the team participants throughout its life cycle.

By default, the *Promotion Request Approval Process* is the only defined workflow in the preference manager and is used for all lifecycle states. To add new promotion workflows, select the *New Promotion Preference Icon* from the Promotion Preference Manager.

Promotion Preference Manager (1 of 1 total object)

  [New Promotion Preference](#) [Find in List](#)

Name	Life Cycle State for Promotion	Value
Default Promotion Processes	All states	Promotion Request Approval Process, Promotion Req ...

This will open the New Promotion Preference window where you can name the new preference, select the workflow to be used, and choose which lifecycle transitions it applies to.

New Promotion Preference

* Name:

* Short Description:

* Full Description:

* Life Cycle State for Promotion: -- Select State --
States already used in promotion preferences are not available.

Available Processes: -- No Process --
 Approval Process
 Change Activity Workflow
 Change Notice Workflow
 Change Request Workflow

Default Process: -- No Process --

Locked:

* Indicates required fields.

OK Cancel

Repeat the process of creating New Promotion Preferences for each lifecycle state that you wish to have use a different workflow. In the Example below, the *Review Process* workflow will be used to promote objects to Prototype, but the *Change Request* workflow will be used to promote objects to Released.

Promotion Preference Manager (3 of 3 total objects)

New Promotion Preference Find in List

Name	Life Cycle State for Promotion	Value
Default Promotion Processes	All states	Sort by Life Cycle State for Promotion
Production Release	Released	Change Request Workflow
Proto Release	Prototype	Review Process

Once complete, these workflows will be available within the Promotion Wizard.

New Promotion Request

Steps: 1: Set Attributes 2: Collect Objects 3: Edit Object List 4: Select State for Promotion 5: **Select Process** 6: Define Participants

Select the promotion process you want the objects to follow.

Process List (2 of 2 total objects)

Name	Description
<input checked="" type="radio"/> Change Request Workflow	Change Request creation, analysis, and disposition.
<input type="radio"/> Package Delivery Process	Package Delivery process manages the delivery of locked packl ...

(1 objects selected)

Back Next Finish Cancel

Using a company specific workflow to promote objects in PDMLink allows companies to tailor the system to meet your specific approval requirements and allows the information being stored in PDMLink to be viewed and leveraged company wide.

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Tips of the Month

Collaborating with 3D PDF Files

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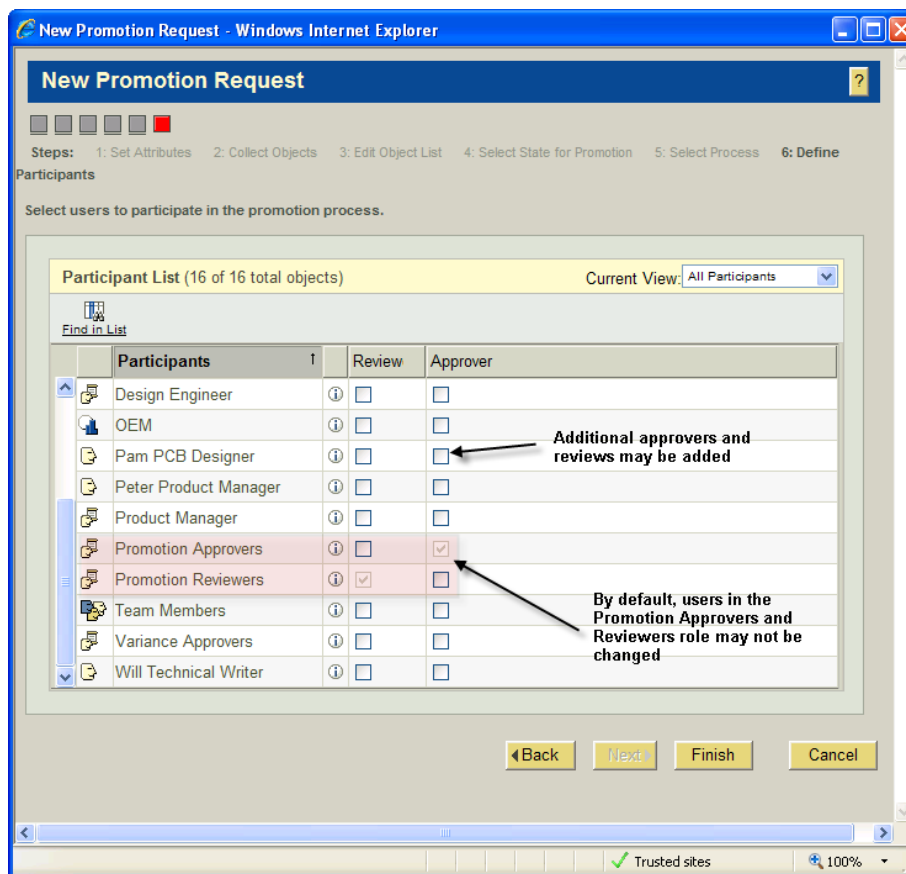
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Tips of the Month

Selecting Promotion Task Participants From User Defined Roles

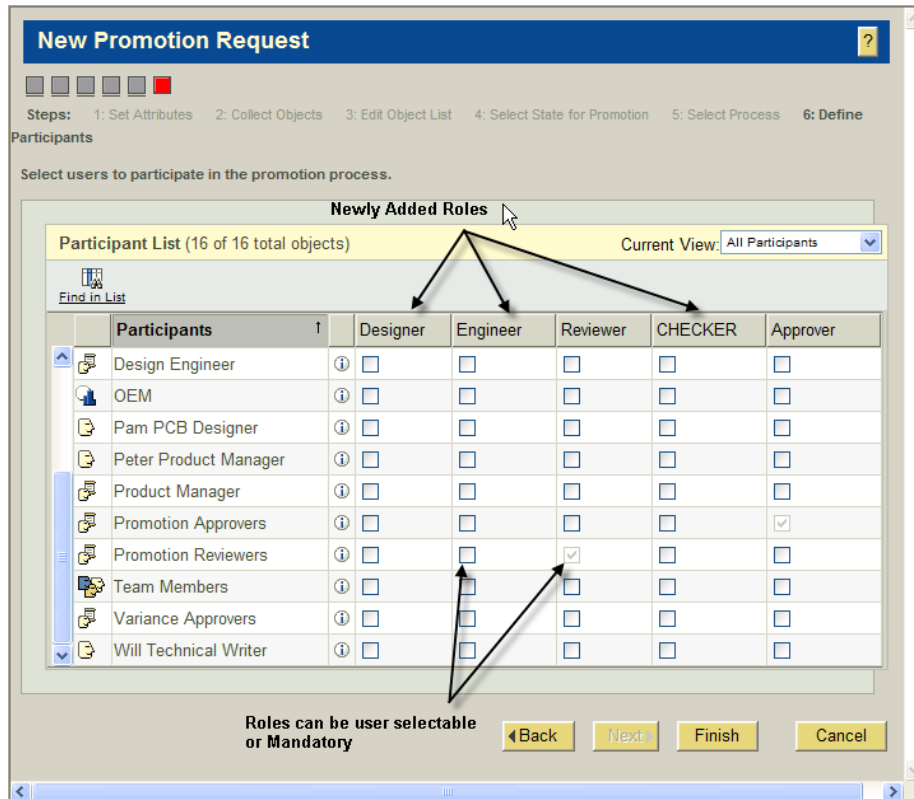
By default, the promotion wizard allows you to select individuals to approve or review the request. The list of available participants is generated from the Product or Library team.

The Image below shows the screen for selecting participants in the promotion approval process



The columns for Reviewer and Approver allow you to select who to route the approval requests to. These specific columns appear because the “Reviewer” and “Approver” roles were defined within the *Promotion Request Approval* workflow.

As we saw in the above Product Focus article, for 9.1 you may change the promotion workflow to any user specified workflow. When this is done, the Promotion wizard reads the new workflow, and displays a column for every role used in the workflow. This allows you to develop a company specific approval workflow and still leverage the standard promotion wizard. For example, a drawing approval process may require the user to select one Checker, one Designer, and one Engineer to be part of an approval workflow. When the role of Designer, Engineer, and Checker are added to the task participant list in the workflow, the Promotion Wizard displays a column for each role:



This occurs automatically without requiring a change to the user interface.

Let's look at what's involved in adding participant roles to a workflow. For this example, let's modify the default *Promotion Request Approval* workflow to include the Role of Designer, Engineer, and Checker.

From the Site Utilities page, open the Workflow Administrator.

Classification Administrator	Create, manage, and view classification structures and the associated classification attributes and constraints.
Manage Distribution	Manage distribution targets used by ESI.
Enterprise Systems Transaction Administration	View and edit the transaction history of published object.
Life Cycle Administrator	Create and manage life cycle templates used for defining the phases and transitions of various business objects.
Numbering Schemes Administration	View information on how to control numbers generated for objects.
Object Initialization Rules Administrator	Create and manage XML rules for object initialization that set default values for attributes and display characteristics that constrain attribute values.
Policy Administrator	Manage administrative domains and the access control, indexing, and notification policies.
Preference Manager	View and set preferences.
Principal Administrator	Support creation and maintenance of Windchill business objects describing users, groups, and organizations.
Promotion Preference Manager	View, create, and edit promotion preferences.
Publish and Thumbnail Control	Controls the generation of visualization objects.
Publish Monitor	View the status of Visualization publish jobs.
Publish Scheduler Administrator	Create and execute publish jobs.
Report Manager	Create, update, and delete reports using the QueryBuilder tool. A report is the output of a predefined search and is used for generating statistics and metrics against business information.
Team Administrator	Create and manage team templates. When creating a life cycle-managed object, you can use a team template as a base for the team participants throughout its life cycle.
Type and Attribute Manager	Manage type definitions, attribute definitions, measurement systems, and quantities of measure. Users with the appropriate permissions can create, modify, or remove types or attributes. Additionally, users can configure display units for attributes, associate attribute definitions with type definitions, and constrain the values of those attributes.
Versioning Schemes Administration	View information on how to control identifiers generated for object versions.
View Administrator	Create and manage a network of available product structure views.
Visualization Configuration Administrator	Manage Visualization Configurations including watermark files and publish rules.
Workflow Administrator	Create and manage workflow templates used for automating processes, in which information, tasks, and documents are passed among participants, within the context of specific business objects.
Auditing Administration	
Audit Log Purge Manager	View the audit log purge history and create a job to purge audit records.
License Usage Reporting	View a license usage report, edit the license count, and view the license count change history.
Security Audit Report Queries	View security audit report queries.
Security Audit Reporting	Create and view security audit reports and save report queries.

From The Workflow Administrator, *Highlight the Promotion Request Approval Process* and select **Edit**.



Workflow Administrator

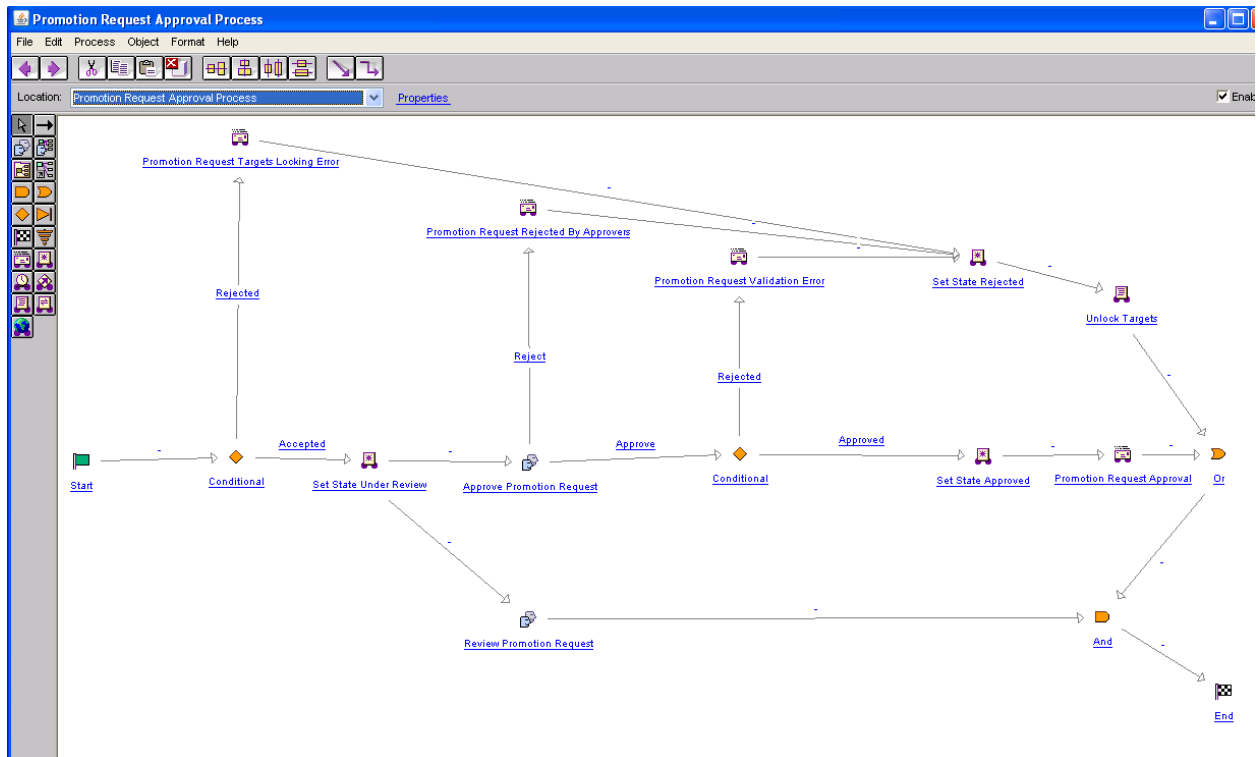
Process Templates

Name	Category	Cabinet	Enabled
Approval Process	Default	System	<input type="checkbox"/>
Change Activity Workflow	Change Manager	System	<input type="checkbox"/>
Change Notice Workflow	Change Manager	System	<input type="checkbox"/>
Change Request Workflow	Change Manager	System	<input type="checkbox"/>
ECMER	Change Manager	Administrator	<input type="checkbox"/>
ECMER2	Change Manager	Administrator	<input type="checkbox"/>
Notify Process	Default	System	<input type="checkbox"/>
Package Approval Process	Default	System	<input type="checkbox"/>
Package Content Routing Process	Default	System	<input type="checkbox"/>
Package Delivery Process	Default	System	<input type="checkbox"/>
Part Request Workflow	Default	System	<input type="checkbox"/>
Problem Report Workflow	Change Manager	System	<input type="checkbox"/>
Process 1	Default	System	<input type="checkbox"/>
Promotion Request Approval Process	Default	System	<input type="checkbox"/>
Promotion Request Review Process	Default	System	<input type="checkbox"/>
Release Process	Default	System	<input type="checkbox"/>
Release to Manufacturing	Enterprise System	System	<input type="checkbox"/>
Review	Default	System	<input type="checkbox"/>

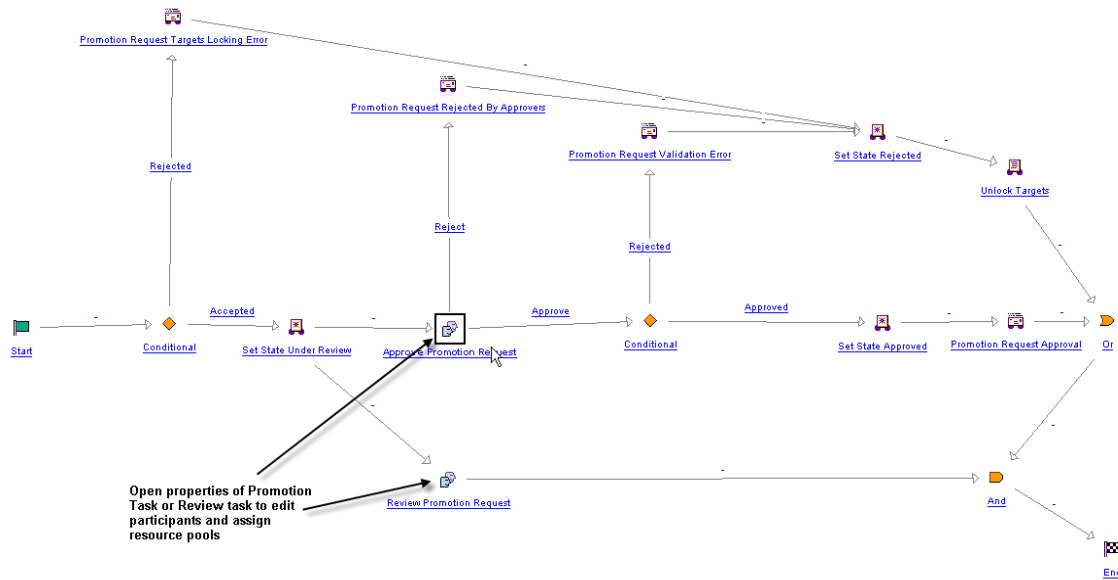
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- Initiate
- New
- Edit**
- View
- Delete
- Rename...
- Move
- Save As...
- Check Out
- Check In
- Undo Check Out
- Iteration History
- Delete Latest Iteration
- Import...
- Export...
- Help

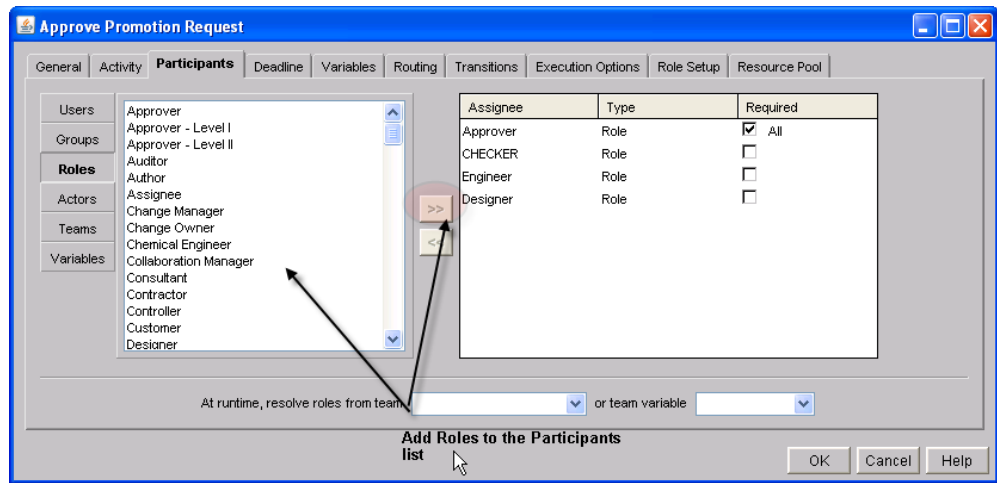
This will open the workflow editor.



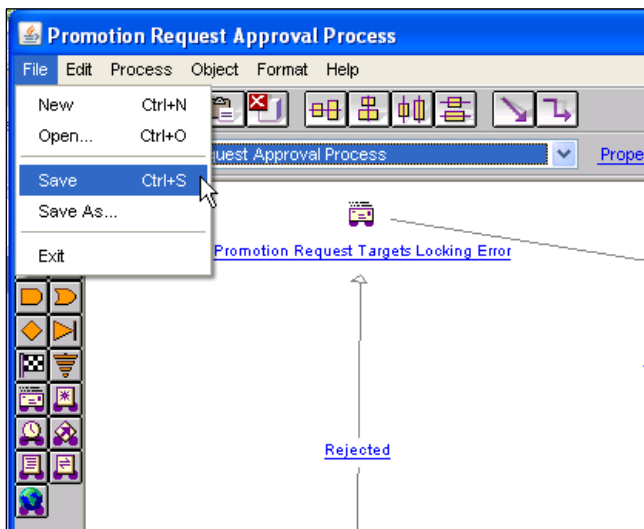
Within the workflow editor double click on the *Approve Promotion Request* Task to open the task :



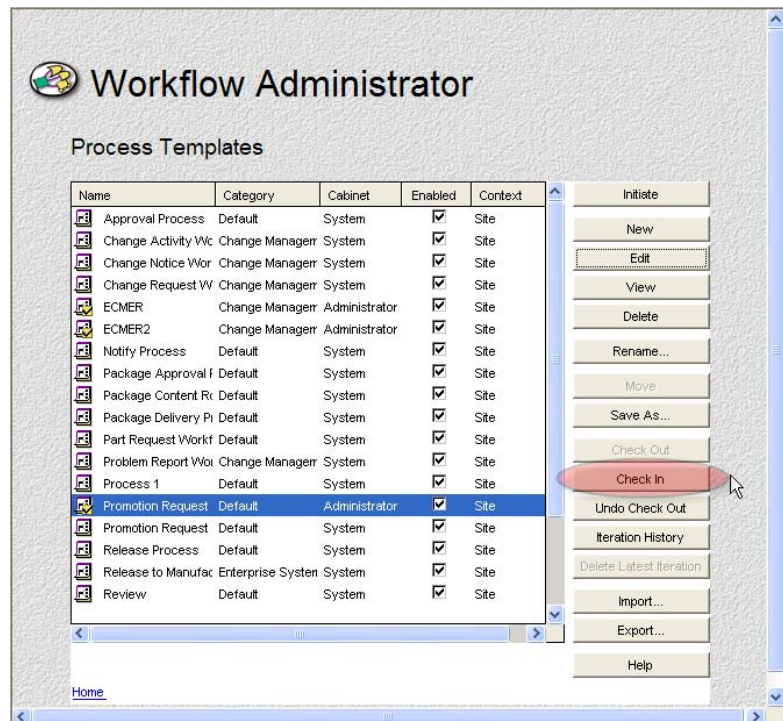
Add the needed Roles to the Assignee List and select OK



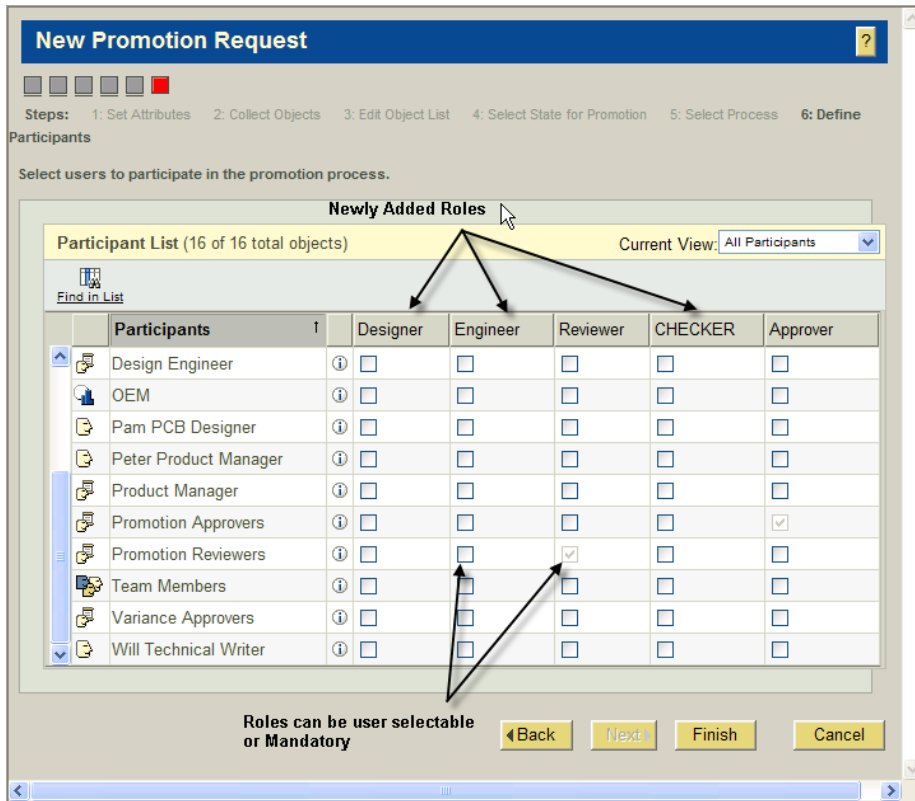
Save the Workflow changes.



Exit the Workflow editor and check in the modified Workflow.



Once the workflow changes have been checked in, these roles will now be visible from the Promotion Wizard.



If you are interested in learning more about creating custom workflows considering taking the PTC University course on Workflow Administration.

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Announcements

Educational Resource Library

Learn things you always wanted to do - but didn't know you could.

This one stop educational resource library will help you learn more about PTC Solutions and provide you with technical materials developed by the product experts to help you become more productive.

Get tutorials, how-to videos and expert advice for:

- Pro/ENGINEER
 - Conceptual and Industrial Design
 - Detailed Design
 - Simulation/Analysis
 - Production
 - Design Collaboration
- Windchill PDMLink
- Windchill ProjectLink
- Pro/INTRALINK
- PTC Online Tools

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Click below to see regularly scheduled Tips & Techniques technical Webcasts that are designed to provide you with the most popular time-saving tricks that Pro/ENGINEER users of all skill levels will find useful. Get more out of your maintenance dollars!

[Tips & Techniques: Work Smarter Not Harder!](#)

E-PROFILES IS HERE!!

We have been eagerly anticipating the debut of the new electronic version of Profiles Magazine and now it is here! This new web site will supplement the print edition of the magazine and will

provide new useful features not feasible with paper media. e-Profiles will provide you with 24x7, worldwide access to key information previously available exclusively in the print version. "Tips & Tricks," a popular feature pioneered by Pro/USER, has also moved to the web and will be expanded as the site matures.

Please take a few minutes to check out this new web site. We don't think you will be disappointed.

<http://profilesmagazine.com/>

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Upcoming Events & Training Class Schedules

Upcoming, 2009 Your local Pro/Engineer User Groups
<http://www.ptcuser.org/rugs/>

June 7 – 10, 2009 Orlando, FL USA
PTC/USER World Event
<http://www.ptcuser.org/>

Events

Our seminars and conferences seek to provide you with relevant information regarding product development trends in your industry as well as innovative software learning experiences. Think of them as a constructive day off where you can share experiences and swap ideas with your peers.

If you can't manage to get away, we'll bring it to you. Check back often for regularly scheduled live webcast events.

[You're Invited to Attend...](#)

Please visit the [PTC Education Services](#) website for the latest training information including course descriptions, schedules, locations, and pricing.

- Attend a course at any PTC Center and receive a **free** copy of Pro/ENGINEER Wildfire Student Edition!

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

Live Instructor-Lead Virtual PTC Training Courses

Virtual Classrooms provide interactive learning with a trained PTC instructor in convenient and manageable sessions that last approximately 4 hours over a series of days. It's easy to join a class right from your desk using a phone or voice-over IP technology.

Sessions are performed just like a traditional ILT (including interactive exercises where you and the instructor can work on lab exercises together) and feature some of our most popular ILT courses. These sessions cover the exact same material as the traditional ILT in-center courses. Also look for some of our most frequently requested mini-topics delivered in the same format that are only an hour - two hours in duration.

If you have any questions about these sessions or would like to see getting other courses, not on this list, on the schedule please feel free to contact me for more details. They are a great way to bring training to you without you having to worry about location or being out from work for long stretches.

You can register for these sessions just as you would for any normal ILT class either by:

1. calling order admin at <http://www.ptc.com/services/edserv/training/registra.htm> or
2. you can go to PTC University directly at <http://www.ptc.com/learning> and submit a registration request directly. All you have to do is search the catalog by typing in “virtual” in the search field and you will see a listing.

PTC

Note: This PTC E-Newsletter will continue to be used for the following:

- 1) Inform you on events related to PTC products (user groups, conferences, training schedules, etc.)
- 2) Educate you on solutions that are available at PTC
- 3) Tips & Techniques using PTC Products

Note: These messages are compiled in the local PTC office and will be distributed via e-mail.

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