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PTC Product Focus

Using the Global Reference Viewer

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PTC Product Focus

Windchill Workflow Delivers Adobe Forms

By default, the Windchill workflow engine delivers workflow tasks as HTML pages. These workflow tasks may also be delivered to the end user as PDF forms. This allows for creating forms which closely resemble the ones commonly used by businesses which have not yet automated their workflow processes, and can lead to smoother adoption of the automated workflows that Windchill provides.

Required Adobe Software

To enable Windchill to deliver PDF forms, the following software is required from Adobe:

Server

- Adobe LiveCycle Forms Server 7

Forms Authoring client

- Adobe LiveCycle forms Designer
 - Bundled with Adobe Acrobat Pro (Windows and Mac)
 - Separately available (Windows only)

Forms read/fill client

- Adobe Reader 7.0 or later (free download)

Adobe Reader Extensions

- Required for off-line editing and saving forms
- Licenses must be purchased per form or per named user

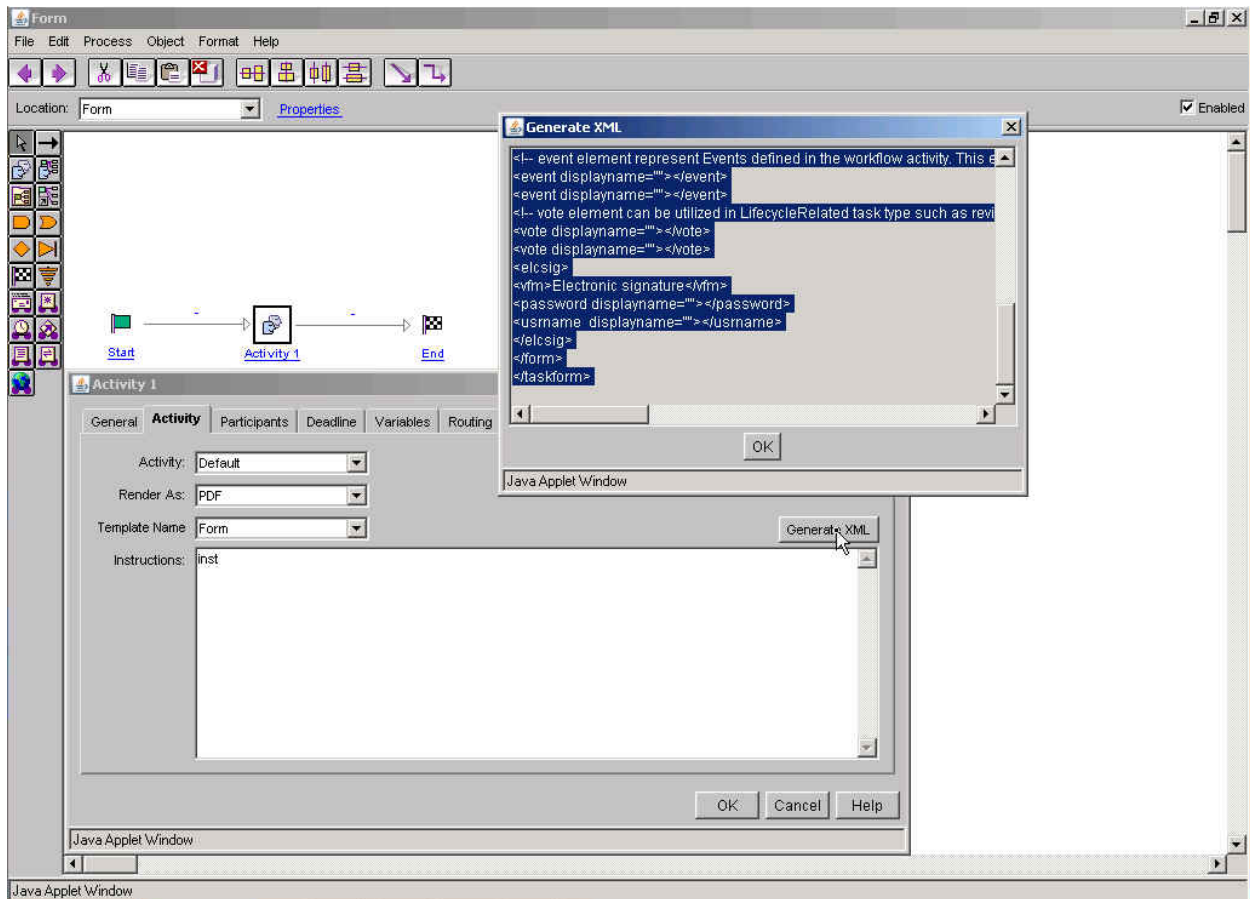
Installation and Configuration

Detailed instructions on installing the necessary software may be found in chapter 16 of the [Windchill Installation and Configuration Guide - Advanced](#)

Basic Steps to build and deploy a PDF form within a Windchill workflow

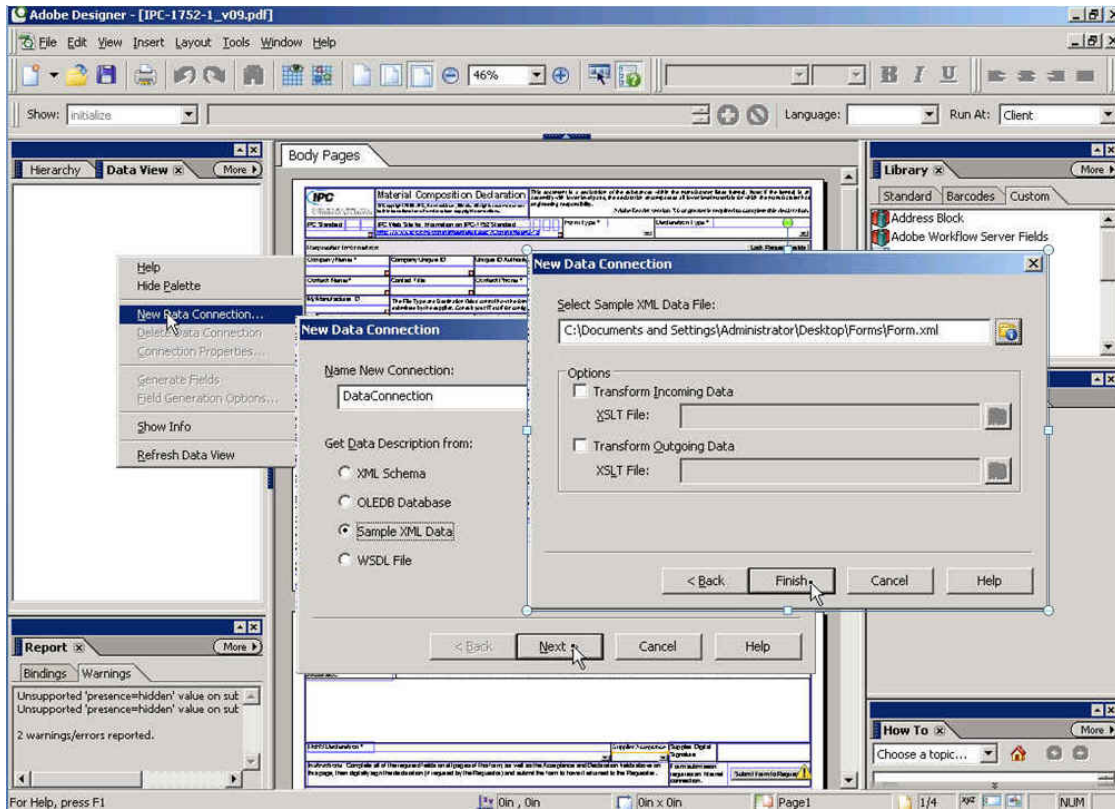
Define The Workflow

- Create Process level workflow variables which will appear on the PDF form.
- Initialize Process level variables into any workflow Tasks which will deliver the PDF form.
- Export the Task XML, copy the resulting XML to your clipboard and paste into an XML file.

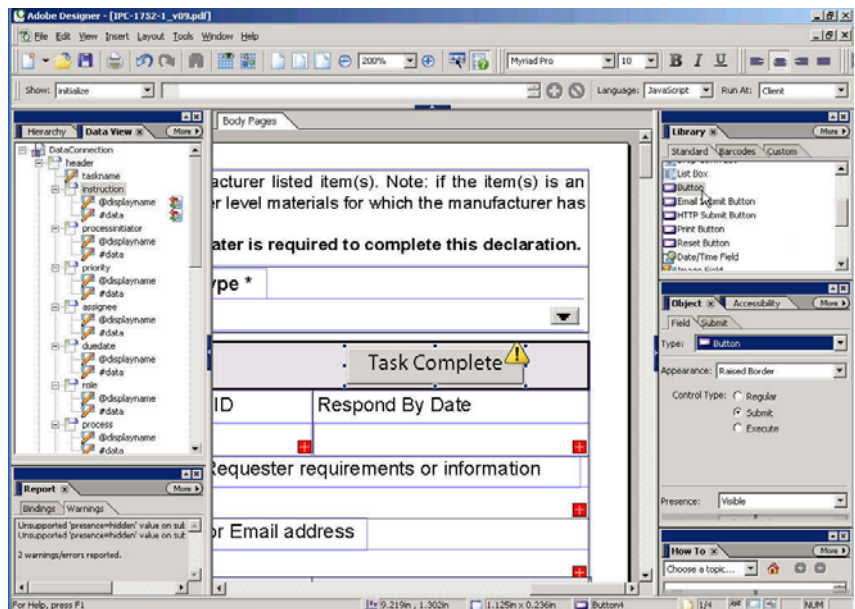


Define The Form

- Open Adobe Forms Designer
- You may either start with a blank form, or import an existing Word or PDF document as a starting point.
- In the Data View, create a new Data Connection based on the XML file.

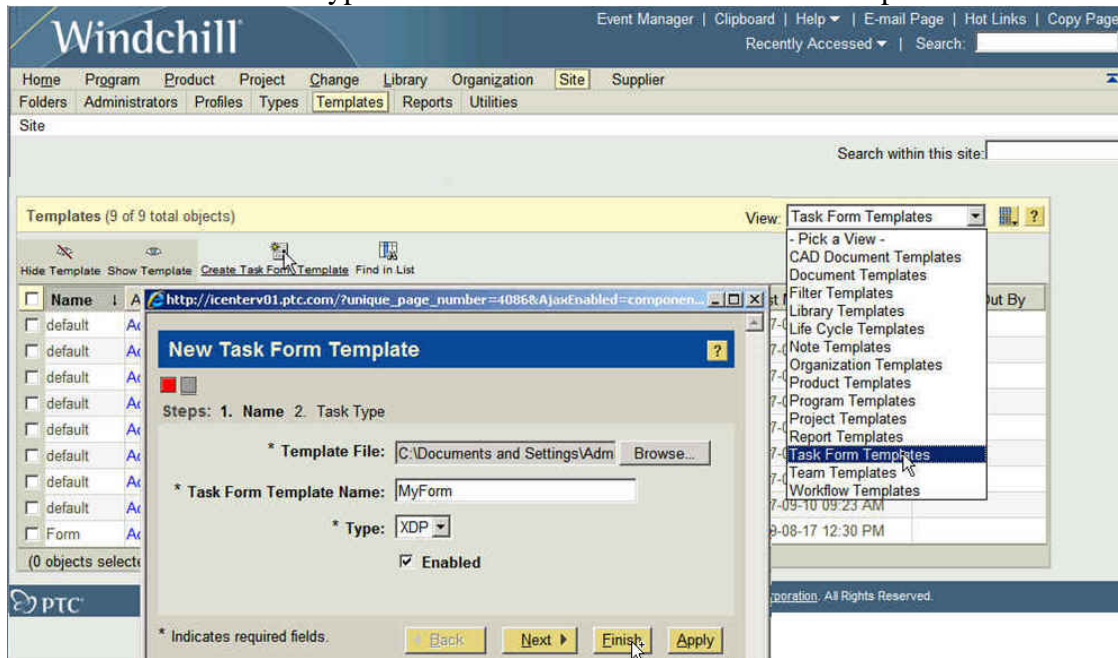


- Drag and Drop form objects such as Text Fields from the Library onto your form.
- Drag and drop workflow variable data into Form Objects to map form fields to Windchill workflow variables
- Drag and drop a Button from the Library. Label it as Task Complete, and make it perform a Submit action.
- Save your form as an XDP file.



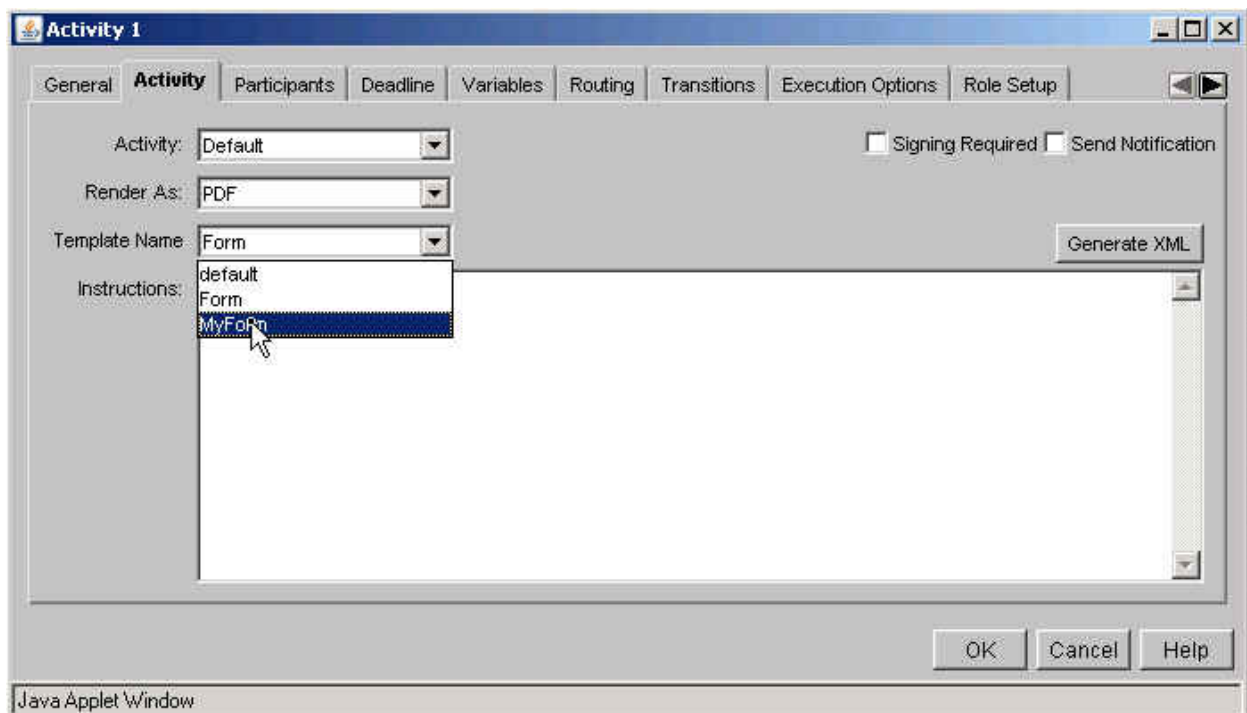
Deploy the form to Windchill

- As a member of the Windchill Workflow Administrator group, navigate to Context / Templates / Workflow Task Templates (from the Template Type pulldown)
- Create a new form of type XDP and locate the form XDP file to upload.



Assign the form to the workflow task

- In the Workflow Process Task Activity Tab, set the task to render as a PDF and select the form you want to use.



Test the workflow

- Save and check in your workflow.
- Initiate the workflow from the Workflow Administrator, or hook it up to a business object via an Object Initialization Rule and Lifecycle
- Open the resulting task from the Assignments List on the Home Page of Windchill

The screenshot shows a web browser window displaying a Windchill workflow form. The browser's address bar shows the URL: <http://icenterv01.ptc.com/Windchill/netmarkets/jsp/workitem/info.jsp?oid=OR%3Awt.workflow.work>. The form is titled "Standard" and "Form Type * Request/Reply". It includes a "Declaration Type * RoHS" dropdown menu. A "Task Complete" button is highlighted in the top right corner of the form area. The form contains several input fields and labels, including "Request Date", "Request Document ID", "Respond By Date", "Phone *", "Contact Email *", "File Type", "Mfg Item Name", "Mfg Item Version", and "Manufacturing Site". The browser's status bar at the bottom shows "Done" and "Trusted sites".

Standard		Form Type *		Declaration Type *	
committee=2-18		Request/Reply		RoHS	
				Task Complete	
D Authority	Request Date	Request Document ID	Respond By Date	Task Complete	
Phone *	Contact Email *	URL for additional Requester requirements or information			
how the form is aff for configuration.	File Type	Destination - URL or Email address			
Number	Mfg Item Name	Mfg Item Version	Manufacturing Site		
D Authority	Response Date *	Response Document ID			
Contact	Email - Contact	Authenticated Representative			

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Tips of the Month

Creating a Volume Analysis Feature

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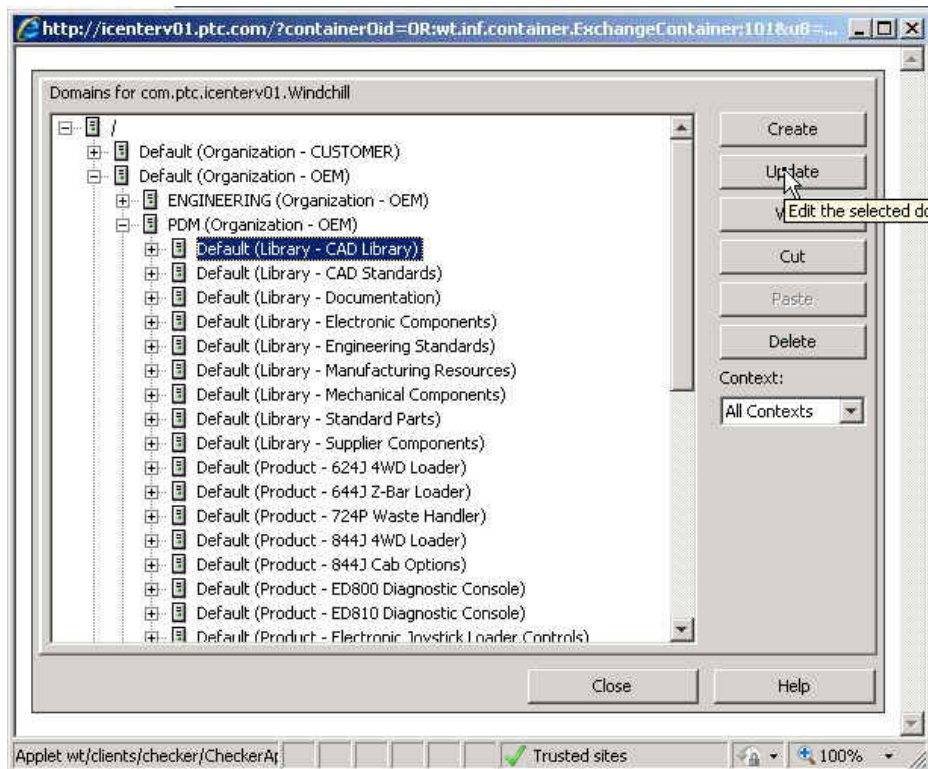
Tips of the Month

Separate Access Control Rules for Content and Metadata

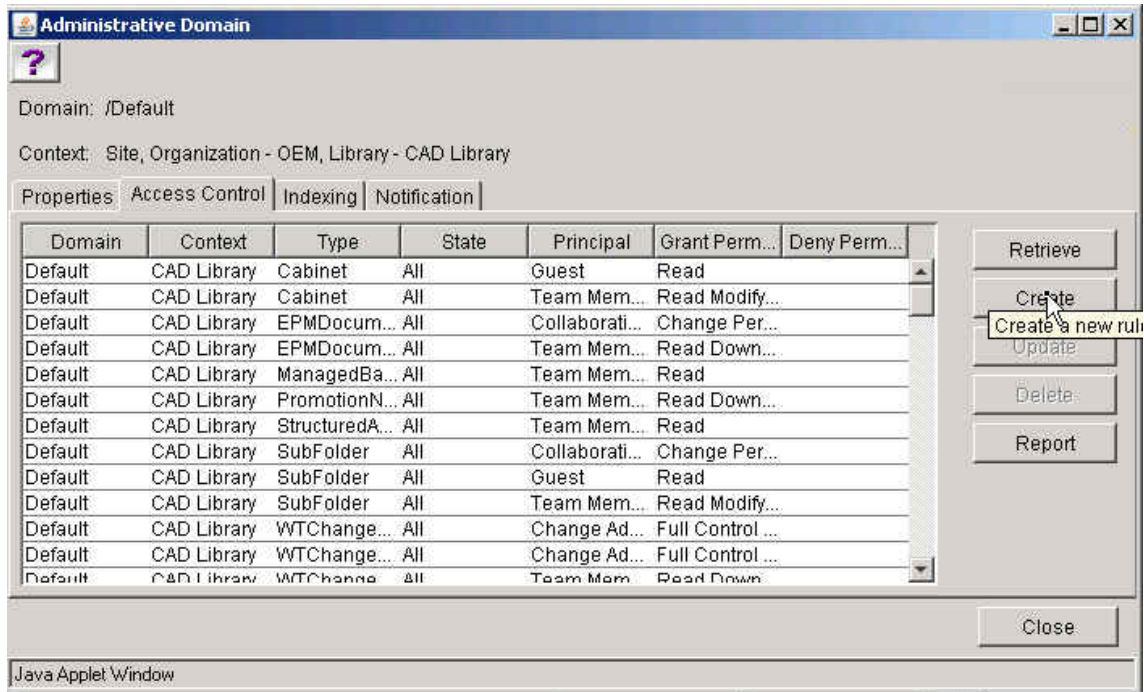
As of Windchill 9, it is possible to specify different access control policies for metadata and content. This additional granularity of access control is useful in several ways. For example, a company may wish to restrict access to the editable original content, and only enable users to access only the metadata and non-editable, viewable representations of a document once it is Released. This enables the viewable representation to become the “document of record”. Users may add annotations, but cannot change the underlying viewable.

Defining Access Control Policies

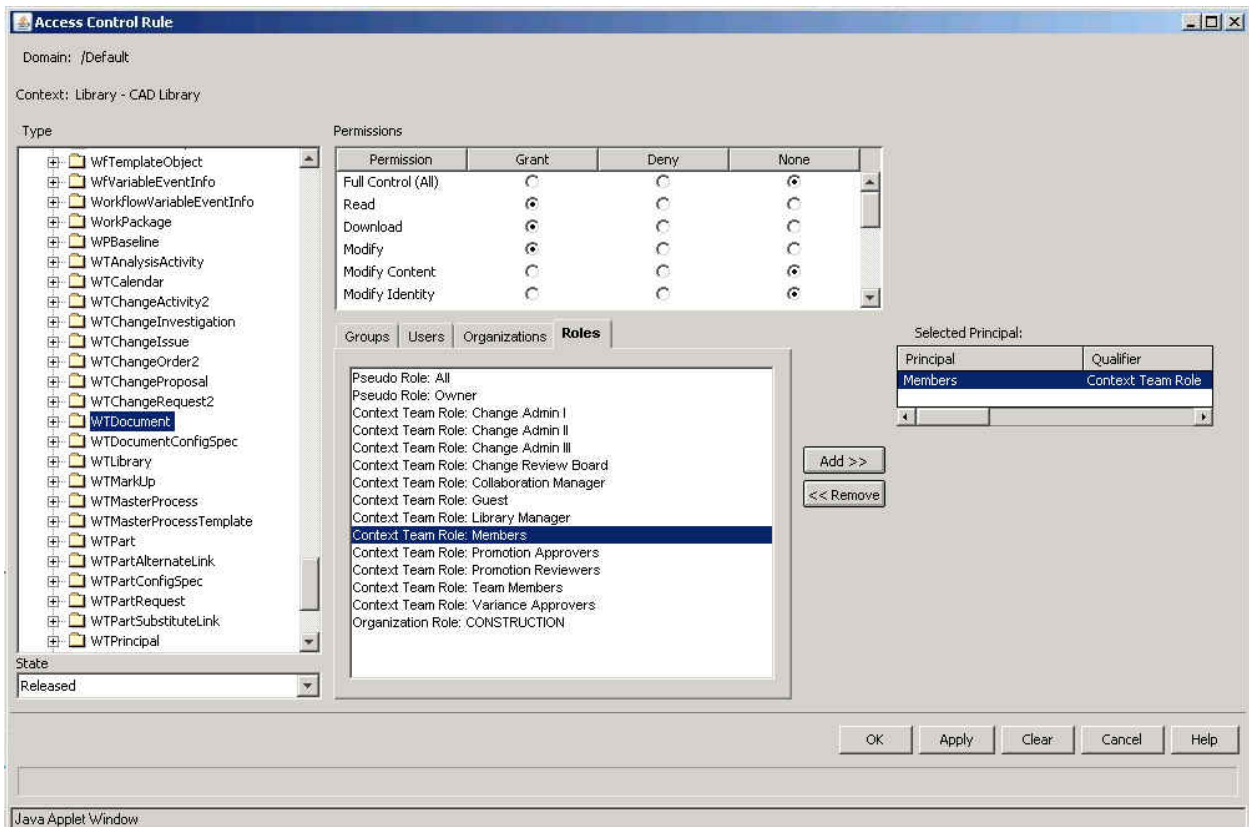
To specify Access Control Policies, as a member of the Administrators group, navigate to Context / Policy Administrator and Update the Domain of interest.



Open the Access Control Tab for the Context of interest and define a new Policy.



Note that there are now separate Policies available for Download and Modify Content.



Note that Download and Modify Content are separate policies now, which apply only to the content holder without affecting access to the metadata and viewable representations.

Permission	Grant	Deny	None
Full Control (All)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Read	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Download	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Modify	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Modify Content	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Modify Identity	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

As always, there are some restrictions to ensure that the resulting rules make sense. If, for example you select to grant Modify Content permission, then Download permission is granted also.

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Announcements

PTC Tips & Techniques Newsletter Archives

Did you miss an issue? Can't find that awesome technique you read about? Fear not, you can click on the link below and go through our Customer PTC E-Newsletter archives.

[Customer Care Zone](#)

PTC Tips & Techniques Webcasts: Work Smarter. Not Harder.

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

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

Special Hardware offers for PTC Customers

- <http://www.hp.com/go/ptc>
- <http://www.hp.com/go/ptcworkstation>

PTC Sponsored Events

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

Explore what is new with the Pro/ENGINEER Wildfire family!

<http://www.ptc.com/go/showcase>

Connect with PTC using the latest Social Networking resources:

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Also visit <http://social-product-development.blogspot.com/>

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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