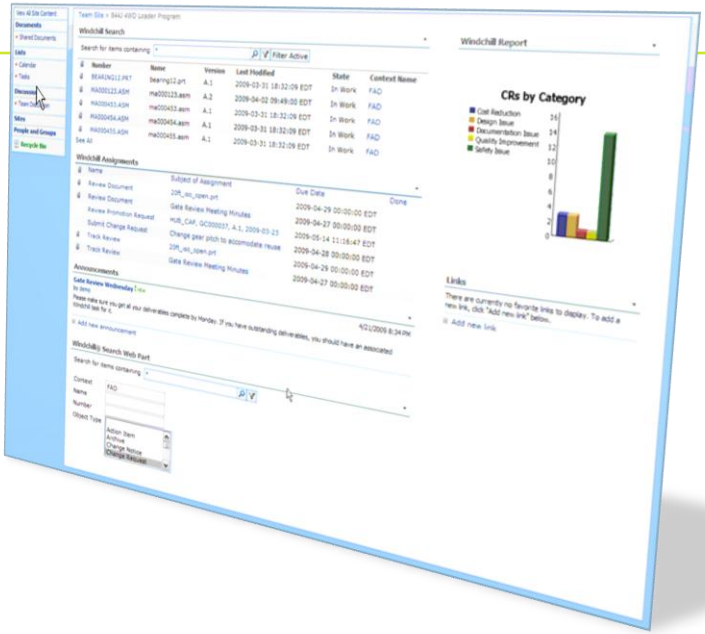
Windchill-SharePoint Integration Overview

May 2009

Why Windchill and SharePoint Together?

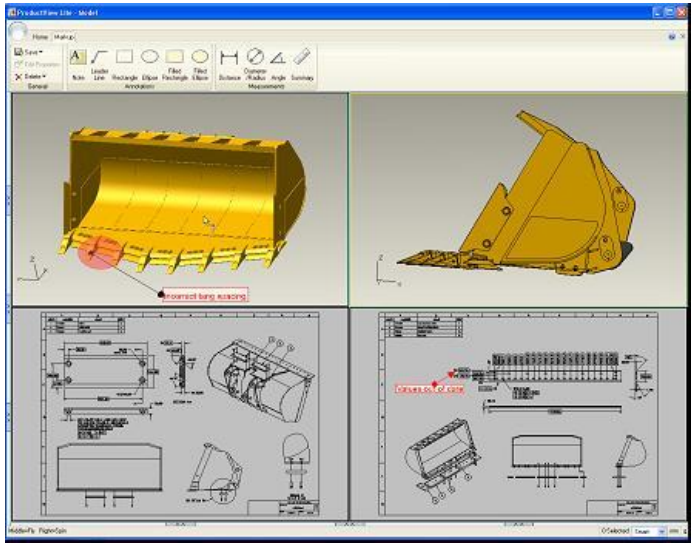
Access advanced PLM-managed information through a familiar interface

- Increase visibility of PLM-managed content to more cross-discipline knowledge management participants
- Leverage a familiar user interface that a majority of participants utilize everyday



SharePoint as a user interface for Windchill PDMLink

- Expand the reach of PLM-managed content throughout the organization, balancing complex change and configuration management with extended ease-of-use and visibility
- Provide lightweight graphical visibility to CAD information directly out of SharePoint
- Augment SharePoint by providing a single source of product content management, classification, change management, etc.



Windchill Web Parts for SharePoint (R9.1 M010 and Later Releases)

The Power of Windchill; the Simplicity of SharePoint

- Easy-to-use web parts expose key PLM capabilities within the familiar SharePoint environment

Improve Worker Productivity

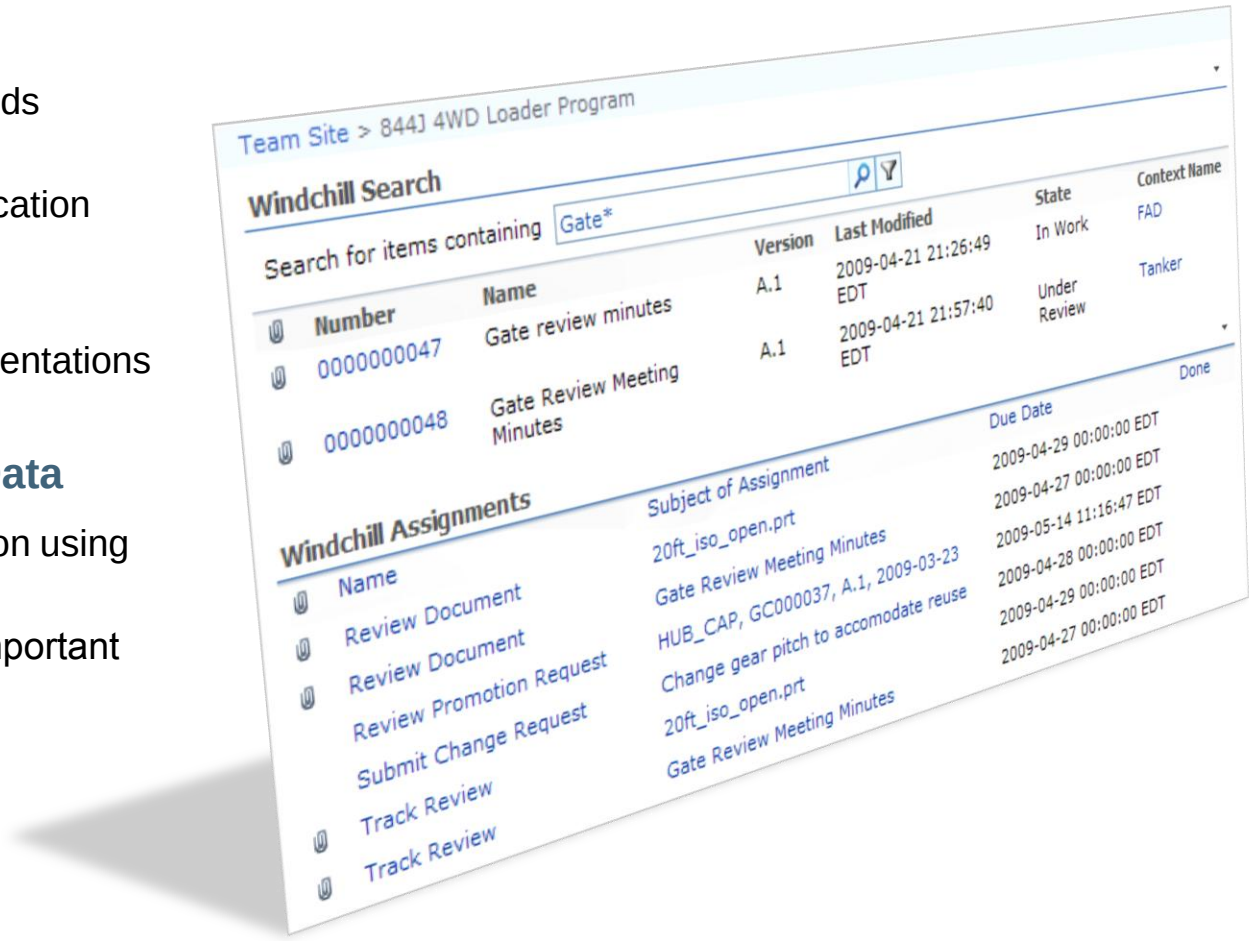
- Build cross-application dashboards
- Seamlessly access and edit documents regardless of their location
  - Windchill Web Parts and Desktop Integration
- View and markup product representations with ProductView

Broaden Access to Product Data

- Search for key product information using flexible search parameters
- Configure “sticky searches” of important data for display in team sites

Compatibility

- WSS 3.0, MOSS 2007, Windchill ProductPoint



Typical Roles and Collaboration Needs

Search, Navigate Relationships, Retrieve Content

View and Print + Complete Assignments, Review/Edit Individual Documents…

Light Collaboration + Edit Attributes and Relationships, Edit Structured Content or Sets of Documents, Review and Mark up Viewables…

Role	View and Print	Light Collaboration	Full Collaboration
Engineers, Manufacturing, Other Traditional PLM Users	X	X	X
Procurement, Marketing, Legal	X	X	
Sales	X	X	
Executive, other G&A	X	X	

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Targeted Scenarios
Windchill Web Parts

Executive Dashboard

- Show Windchill Business Reports in context with reports from ERP, sales, and corporate finance
- Windchill assignments for the occasional approvals that reach the executive level
- Suitable for executives that need a broad view of program status across all disciplines, presented in a familiar interface

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Targeted Scenarios
Windchill Web Parts

Multi-Application Visibility and Responsibility

- E.g. Manufacturing Engineer
  - Process planning (MPMLink)
  - Reviewing/approving engineering changes (PDMLink)
  - Optimizing the production schedule (ERP)
  - Reviewing/approving vendor selections (ERP)
  - Monitoring order status for critical parts (ERP)
- Portal used for at-a-glance access to key events and status in each vertical application
  - Light collaboration tasks from within the portal itself
  - Navigate to the relevant vertical app for detailed work

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Targeted Scenarios
Windchill Web Parts

Project/Program Collaboration

- Many elements of project/program execution are not directly related to product development
  - Program Manager is responsible for overall execution success of the program
    - cost, quality, weight, financial, market share, volume, and design/feature objectives
  - Finance team is responsible for performance to cost and profitability targets
  - Marketing is responsible for market communications, campaigns, etc
- Members of program management team may use SharePoint for general collaboration
  - Documents, schedules, and other data may be shared using SharePoint
- Windchill is used to manage product development process

Typical Tasks for these Extended Project Team Roles

- Approve changes
- Review PLM-managed documents
- Search for/access product information

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Targeted Scenarios
Windchill Web Parts

Partner Collaboration

- OEM uses PDMLink/ProjectLink; small supplier uses ProductPoint
- Supplier is required to collaborate with OEM using ProjectLink

Typical Tasks for Supplier

- Respond to assignments
- Search for OEM documents or other objects
- Keep tabs on updates to dependent OEM data

Web parts permit supplier to achieve much of their customer interaction while in their own ProductPoint environment.

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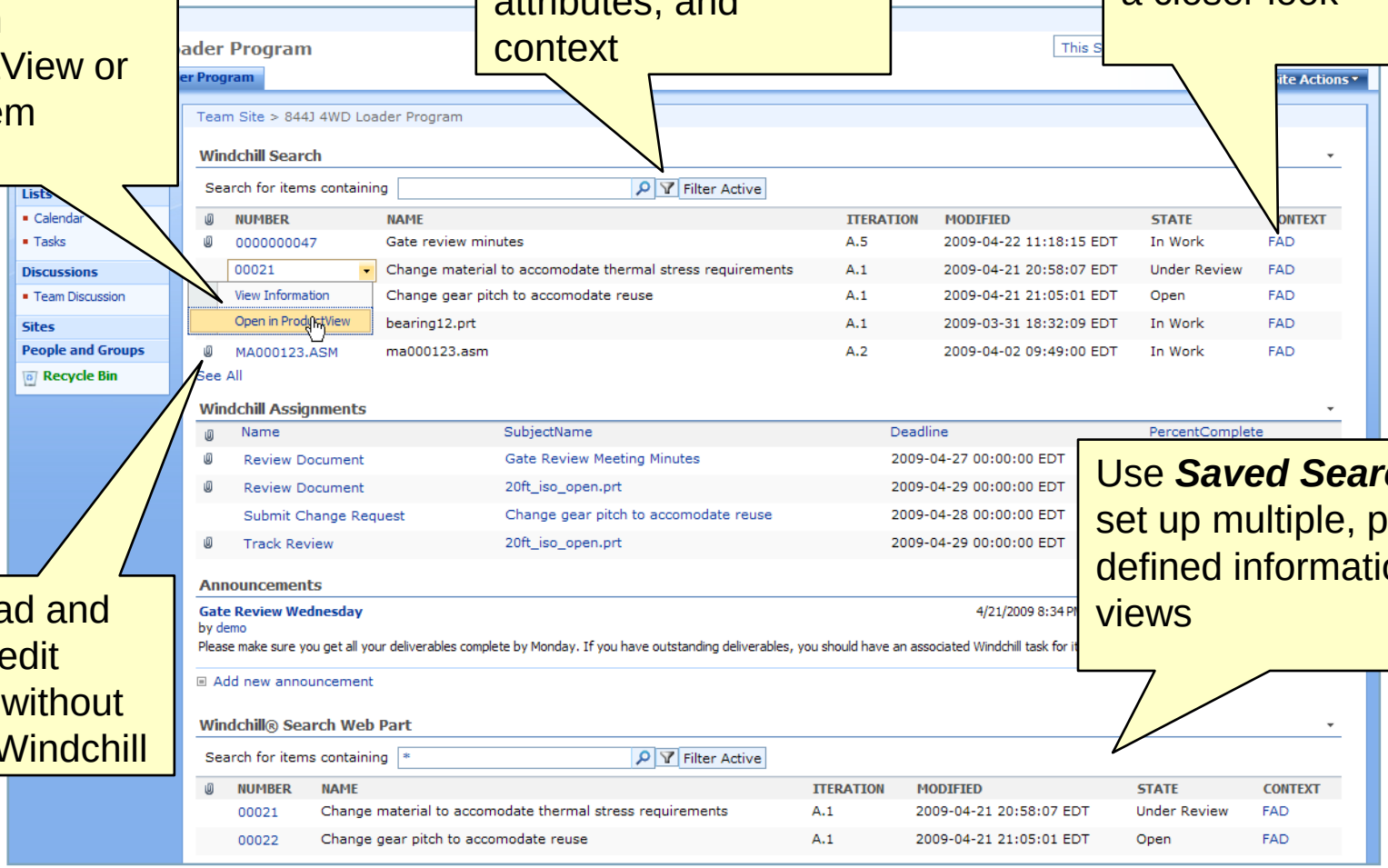
Windchill Web Part – Search

Open in ProductView or View Item Details

Filter by common criteria like type, attributes, and context

Navigate to the container context for a closer look



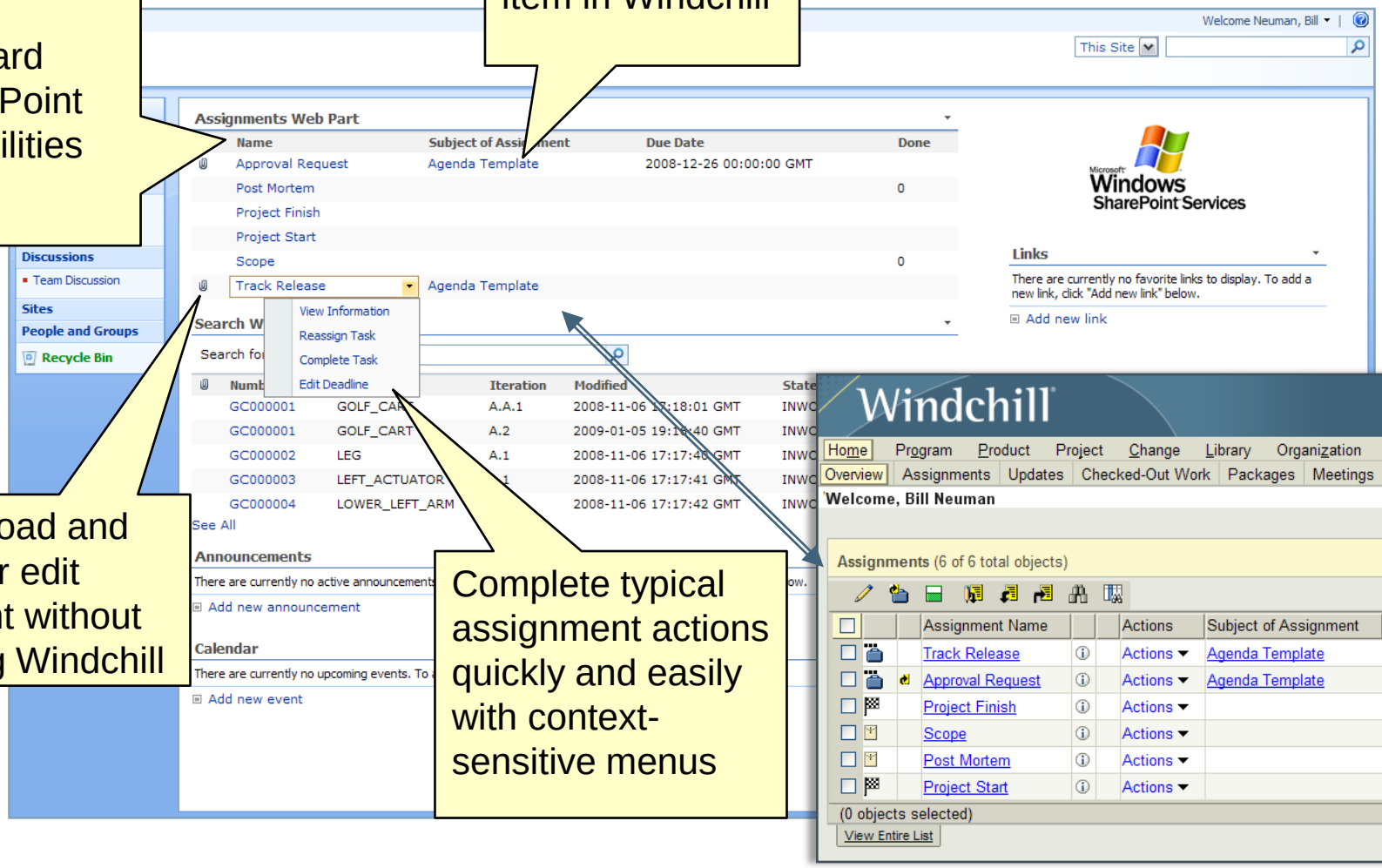
Download and view or edit content without visiting Windchill

Use ***Saved Searches*** to set up multiple, pre-defined information views

Windchill Web Part – Assignments

Sort and filter using standard SharePoint capabilities

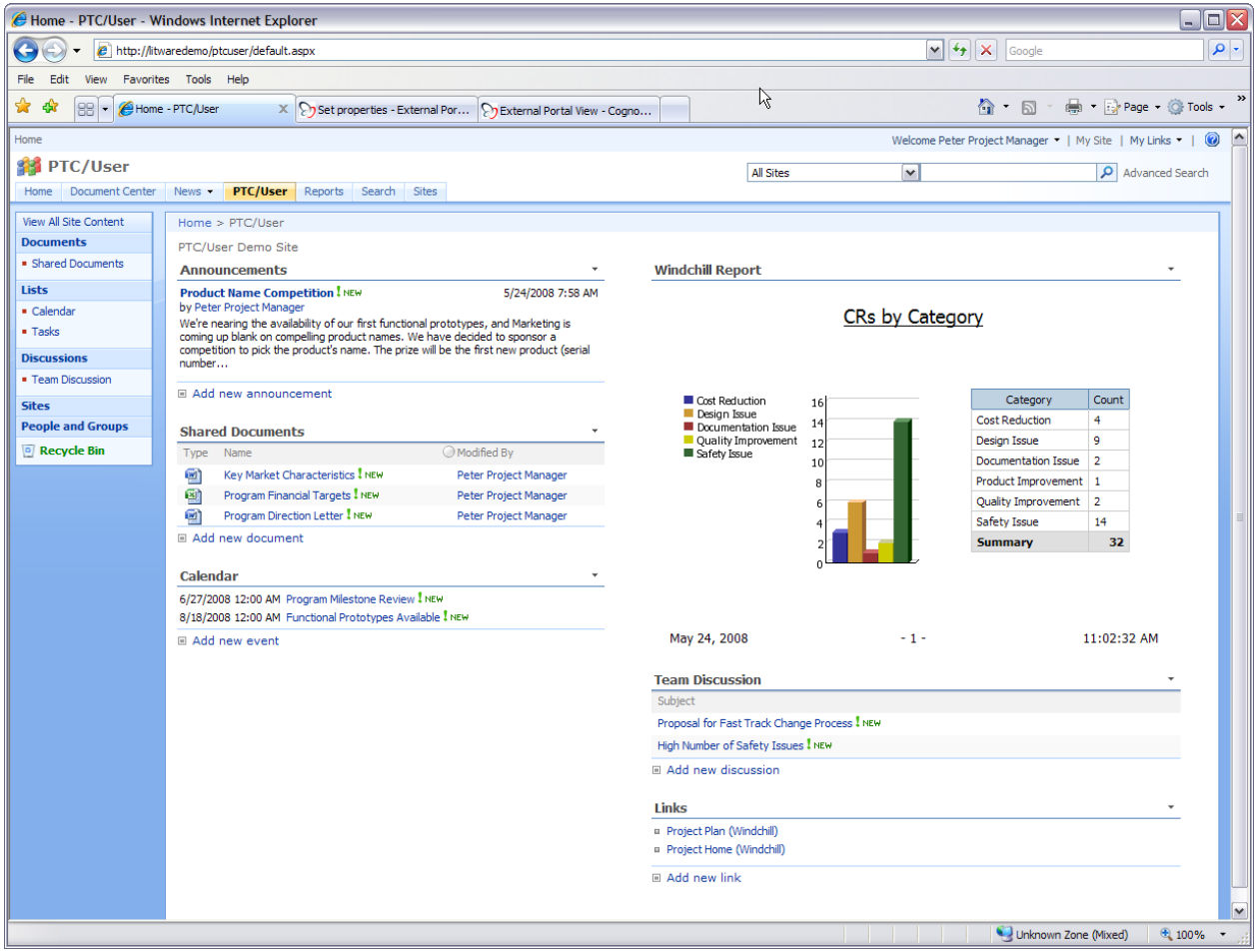
Navigate directly to the subject item in Windchill



Download and view or edit content without visiting Windchill

Complete typical assignment actions quickly and easily with context-sensitive menus

Windchill Business Reports in Portals



Embed Windchill Reports in your Corporate Portals

- Construct cross-application dashboards
- Increase process and product visibility across the extended team
- Supports popular corporate portals, e.g.
  - Websphere
  - SharePoint
  - Netweaver

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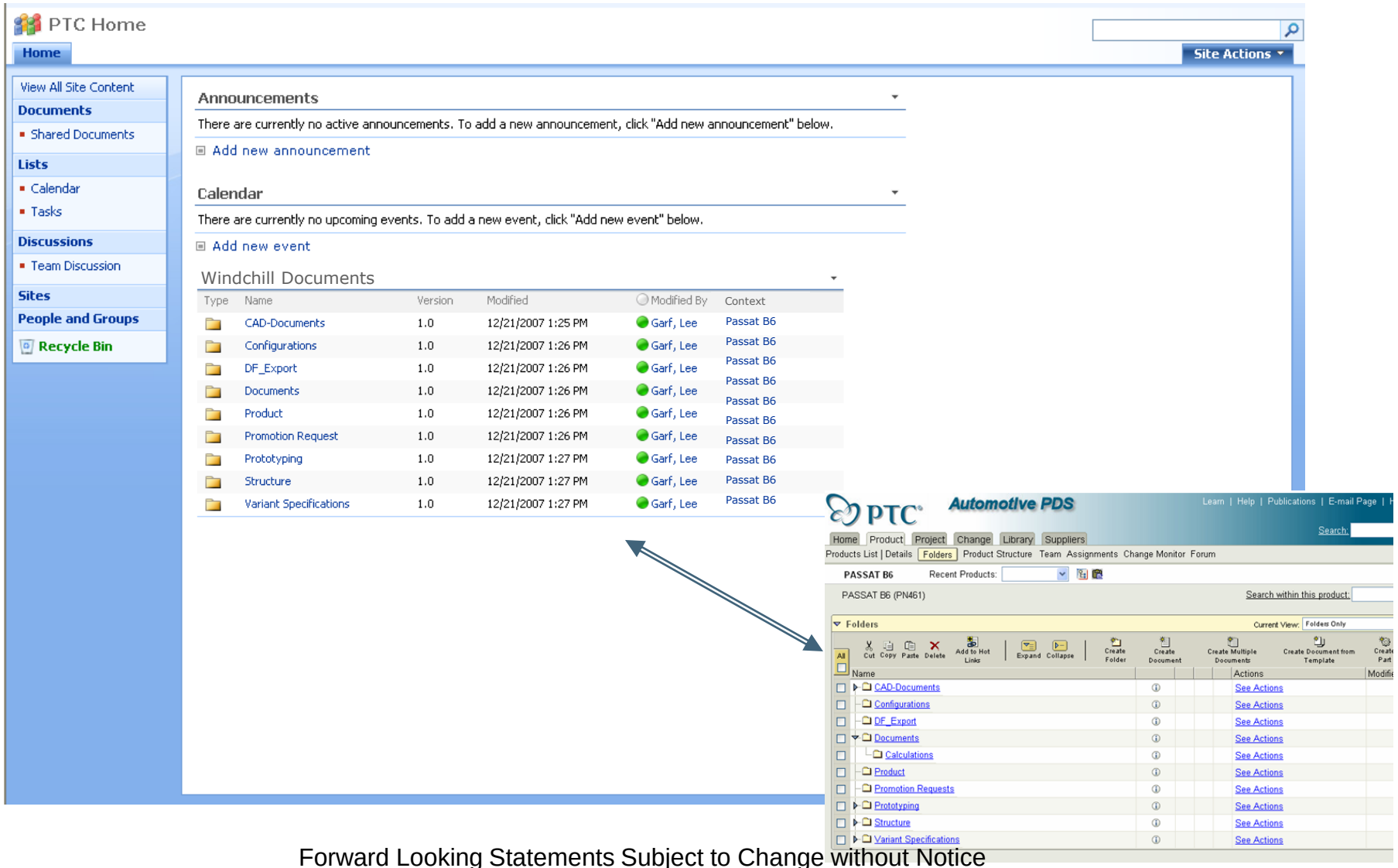
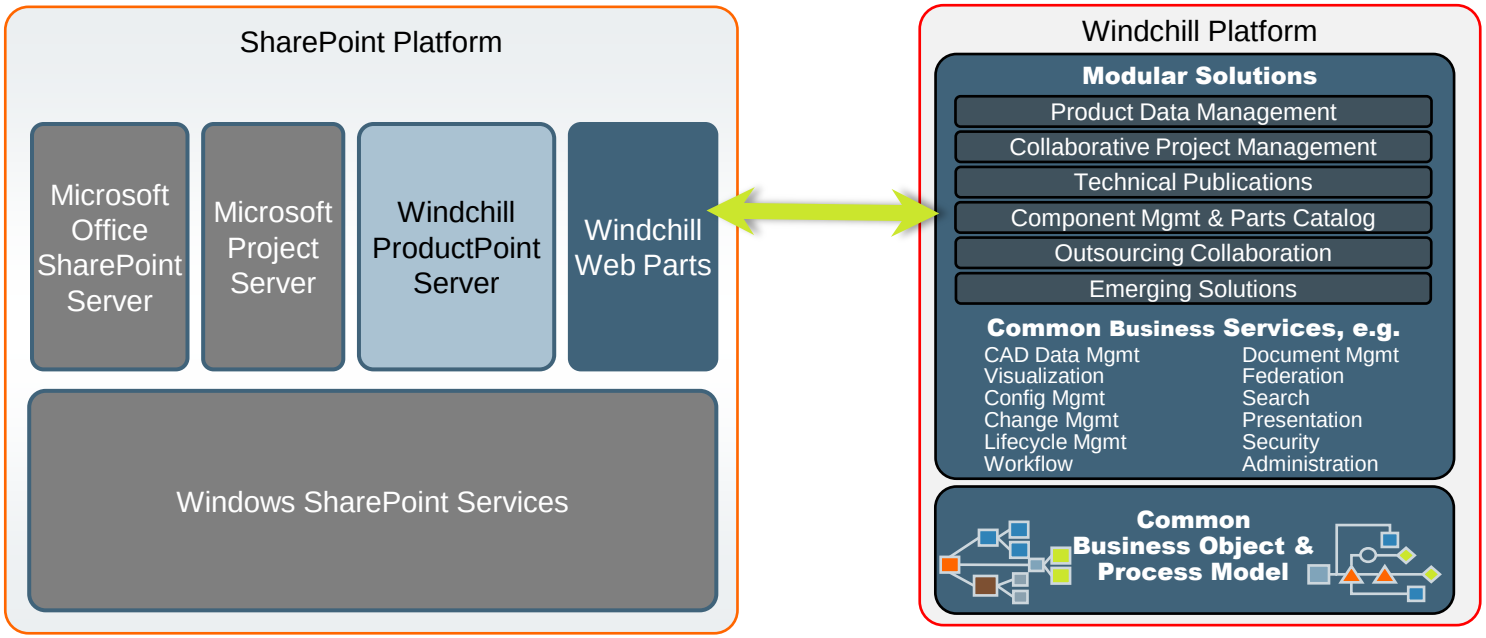
Web Part Concept – Folder Browser (Target 9.1 Maintenance Release)



Forward Looking Statements Subject to Change without Notice

Differentiating Windchill Web Parts from Windchill ProductPoint



Windchill ProductPoint

- Runs completely inside the SharePoint architecture
- Provides CAD data management on top of SharePoint's other horizontal collaboration capabilities
- Content lives inside SharePoint

Windchill Web Parts

- Allow remote interaction with Windchill PDMLink, ProjectLink, Pro/INTRALINK, or Arbortext Content Manager
- Leverage SharePoint's ease of use, but leaves the content within the Enterprise PLM system
- Blends SharePoint's Ease of Use with Enterprise-Class PLM Capabilities

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