Lightweight Extensions

MSOI Desktop Integration

Installation and Setup

Should be as easy as;

- Go to the Home | Utilities page

- Click on Software Downloads, accept the license agreement

- Select Windchill Desktop Integration

- Follow Prompts to Install

- Two User Preferences to set:
  - Content: Download Operation Type
    - Always open in application
  - Content: DTI File Download Option
   - Always use Desktop Integration

Downloading a Document via DTI

Usage Scenario

- Start with an already checked in Document

  – In 8.0 M010, this will change, you can save a new document in Word as a "Windchill Document"

From the folders page,

1. Click the See Actions link of a document that you need to work on.

2. Click View

3. The file Opens in the Corresponding Office Application

Simply clicking the name of the document will achieve the same result with only one click!

①

②

③
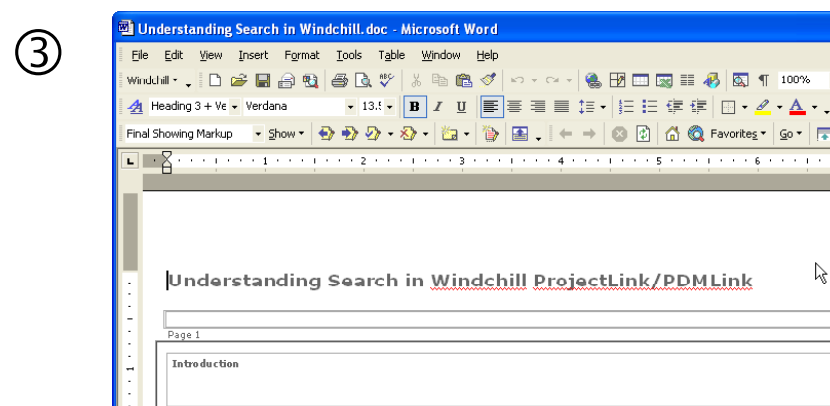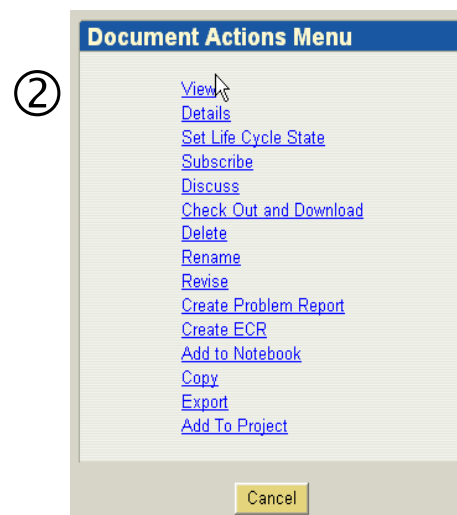
Checking the Document out

After you've downloaded the document,

- You can choose to check out the document via the Windchill Menu

- You can also revise the document to create a new version of it (this automatically checks it out too!)

- If you make undesired changes, you can "revert" to the Windchill Copy and start over

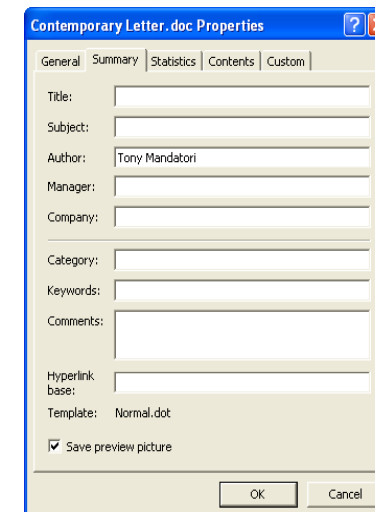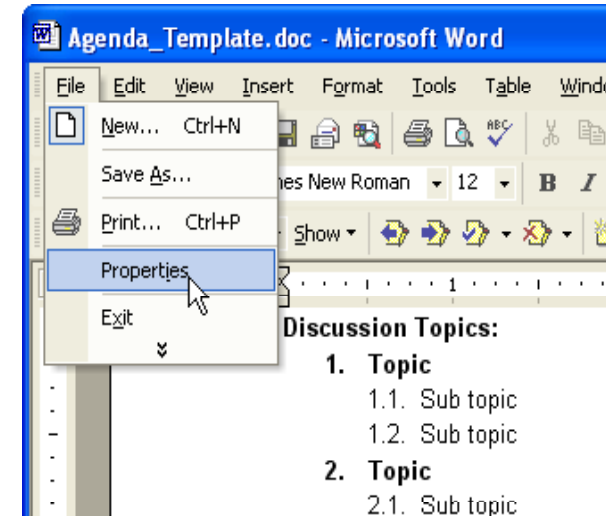- You can also view the document meta-data in a small pop-up in Word by choosing "View Properties Page"
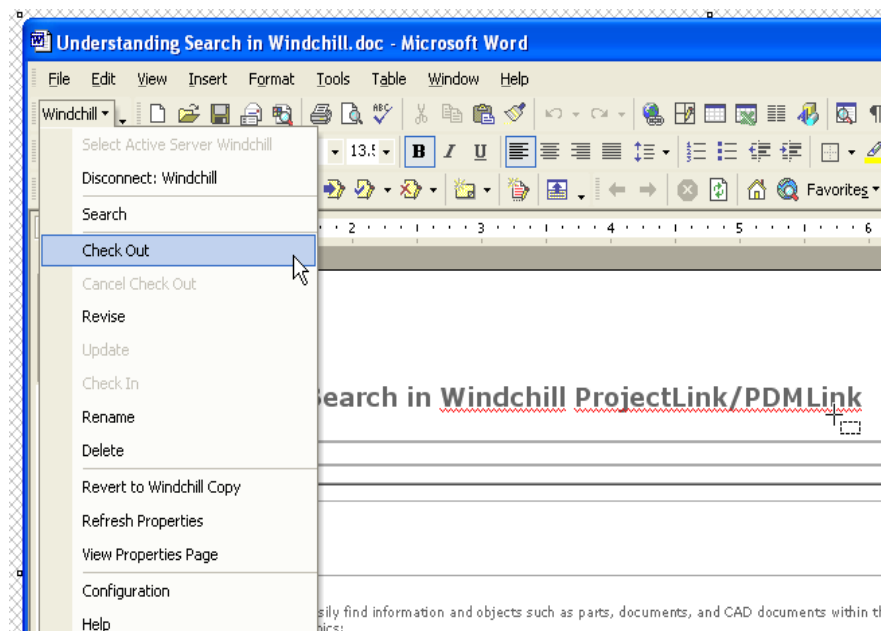
Document Properties

All MS Office Documents will have Document Properties

Standard MS Document Properties include:

- Title
- Subject
- Author
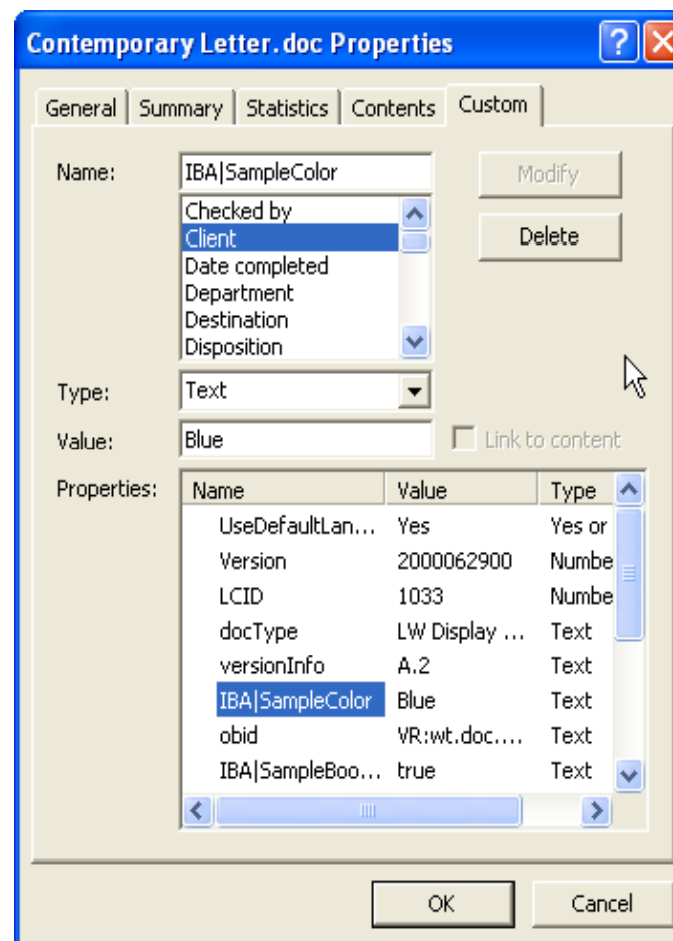
Document Properties (cont'd)

Windchill Attributes

- Appear on the Custom Tab

IBA's

- Appear in the Properties List
- Ordered by Type
- According to their DISPLAY NAME
- Prefixed by "IBA|"

Updating Document Attributes

MS Word properties can be modified in Word.

- Update the Summary attributes by selecting File | Properties in Word

- Change the information on the Summary Page

- Must run Windchill | Update to have these attributes saved to the server's checked out version

  – Allows the document to stay checked out but will update the document on the server. Other users will not see the changes until the document is checked-in.

Updating Document Attributes

Run the Update Wizard by selecting Windchill Update

Updating IBA's

IBA's are updated in a similar fashion
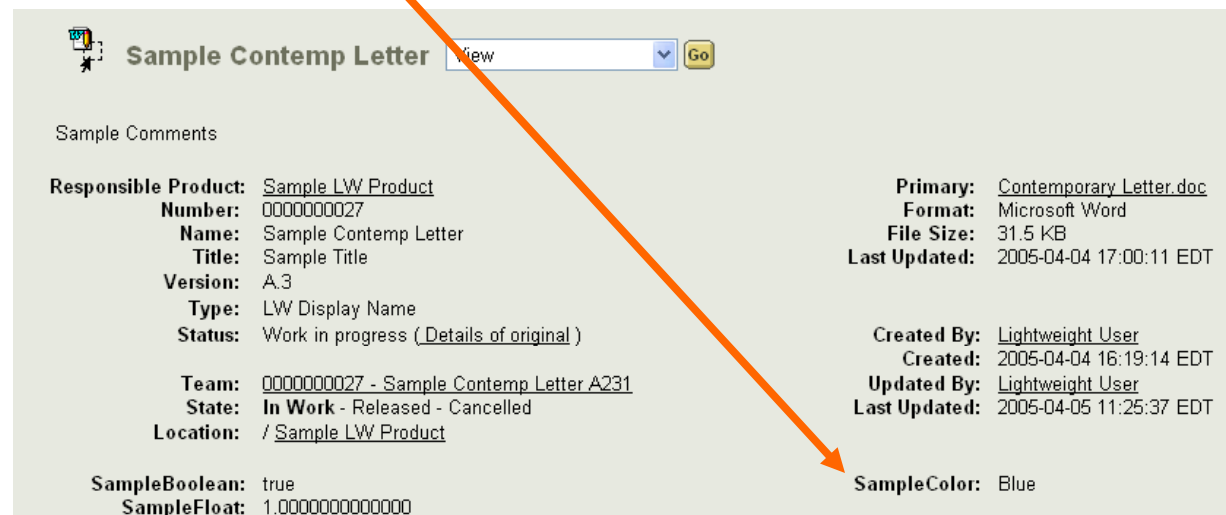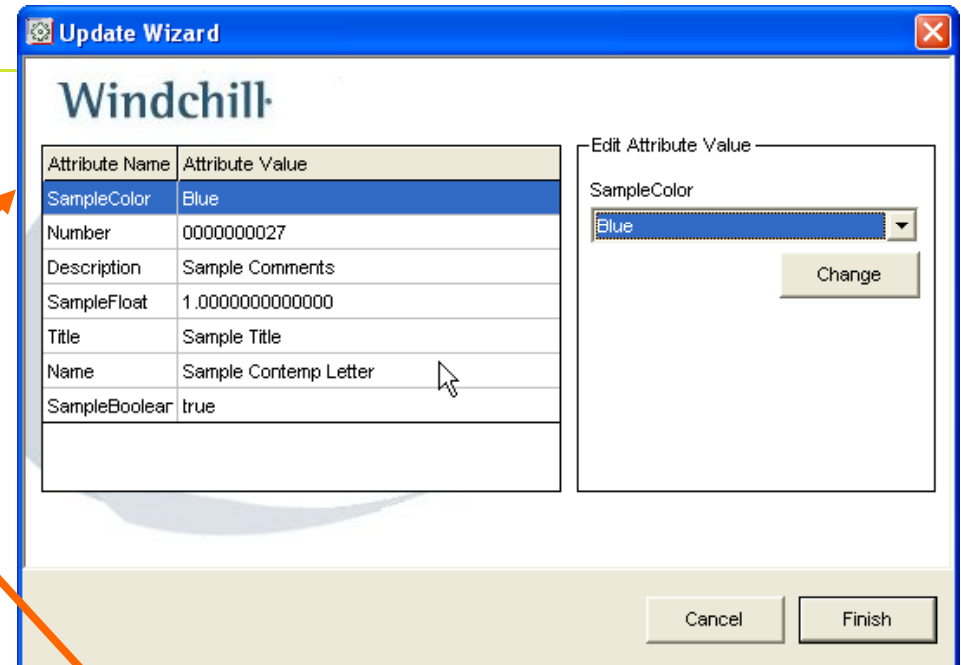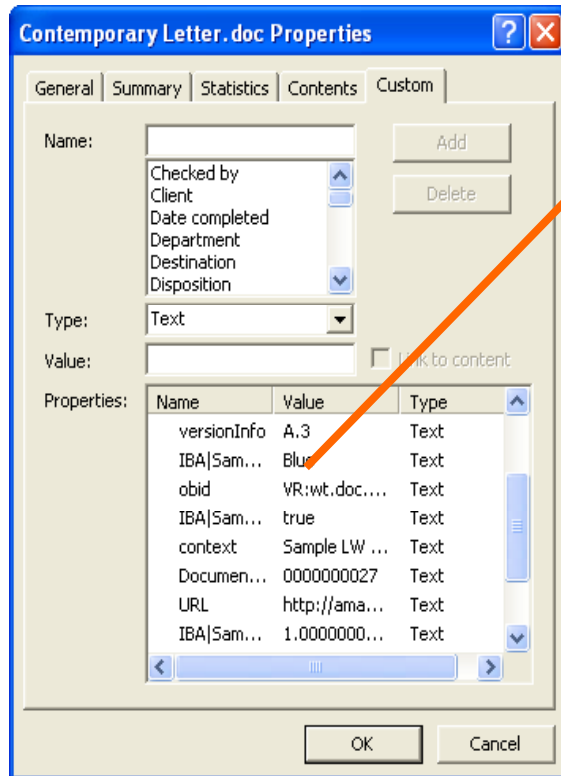
Soft Attribute Mapping

The list at the right are the WTDocument and special attributes that are defined.

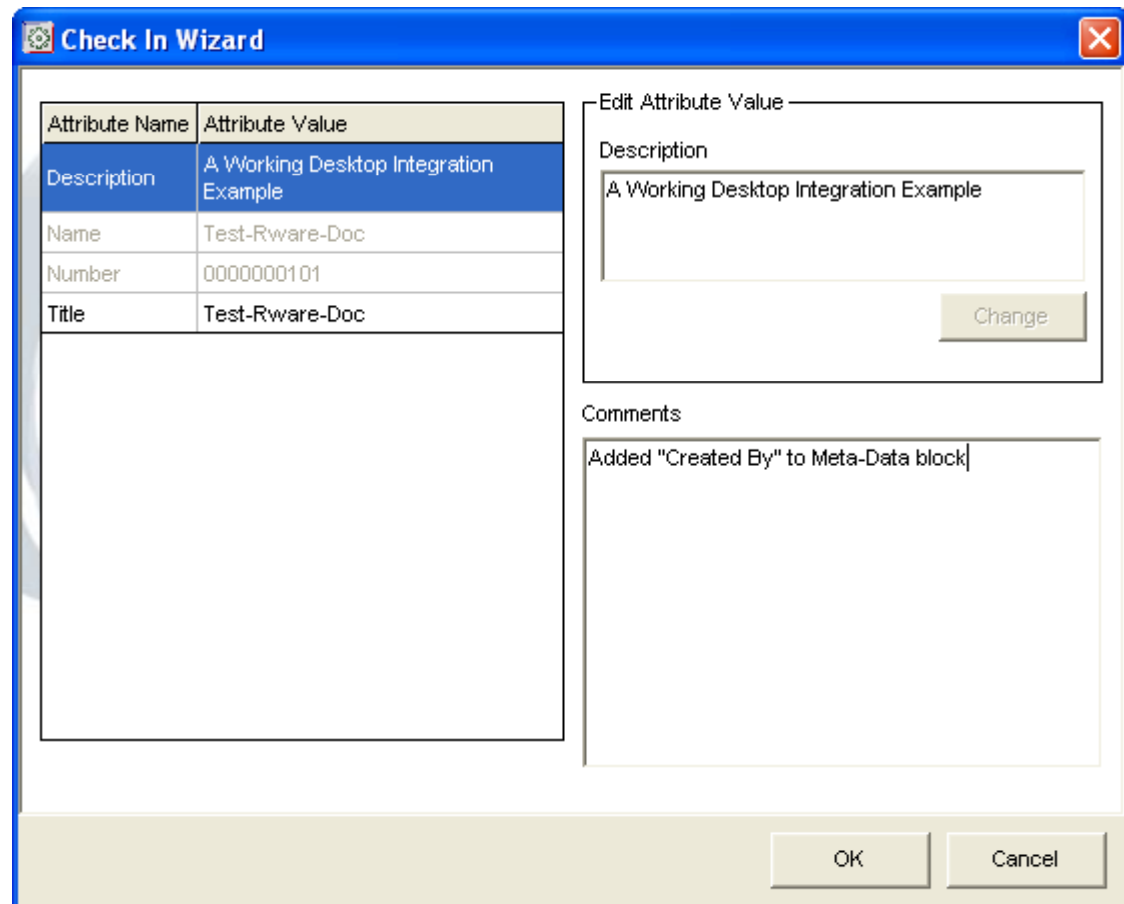| Office Attribute Name	Windchill Attribute Name
Title**	Title
Comments**	Description
URL*	Primary Content URL
wtname*	Name
Document number*	Number
docType*	Type
context*	Context
versionInfo*	Version Info (A.1)
lifeCycleState*	Life Cycle State
obid*	Object Reference

* In Custom Tab

** In Summary Tab

Note: The Obid field should not be edited. This attribute retains the document's relationship to Windchill.

Check-In

Check the Document back into Windchill

Attribute values can be manipulated here as well as adding check-in comments
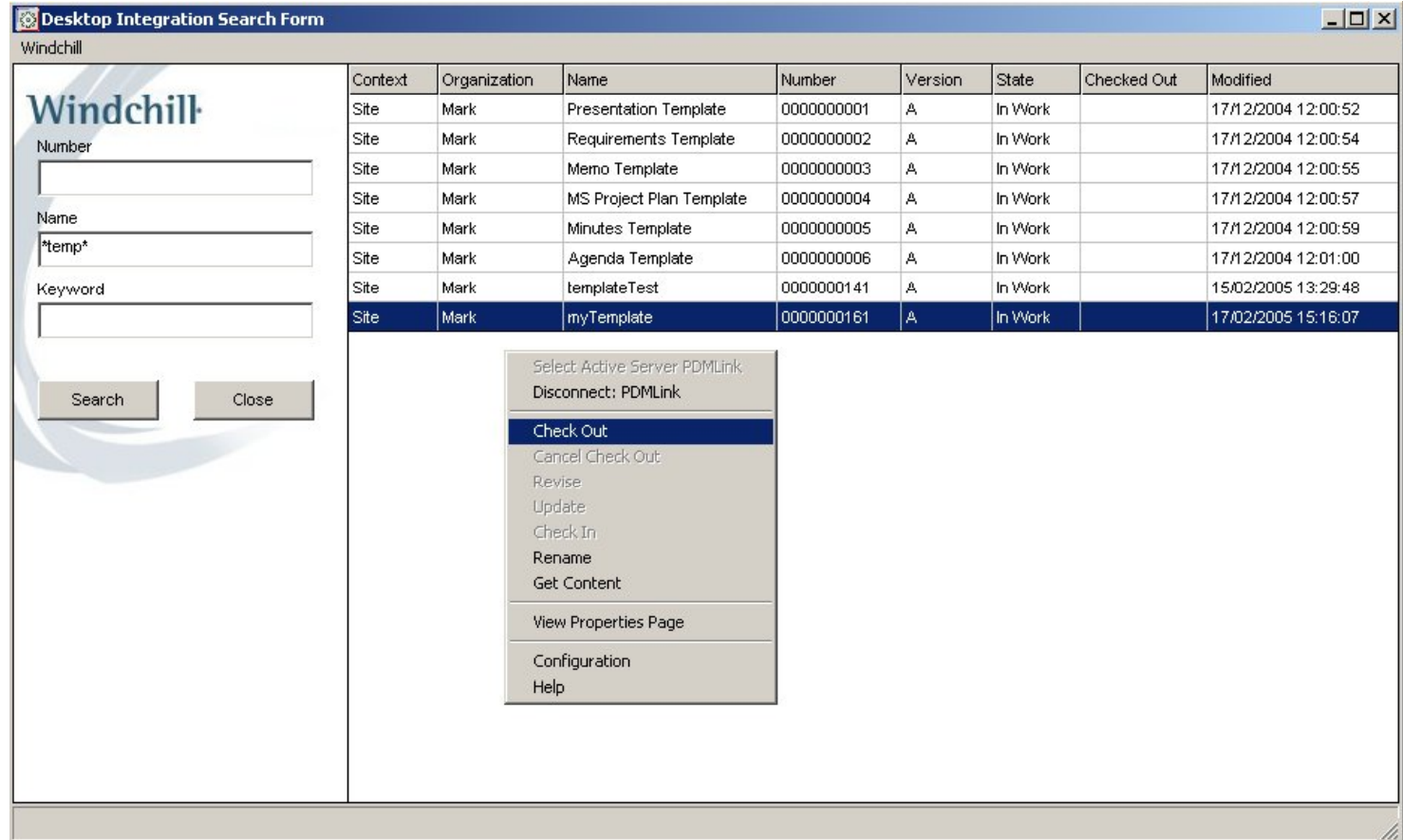
Search

Search for template in Desktop Integration

- CheckOut the document template using the Right Mouse Button
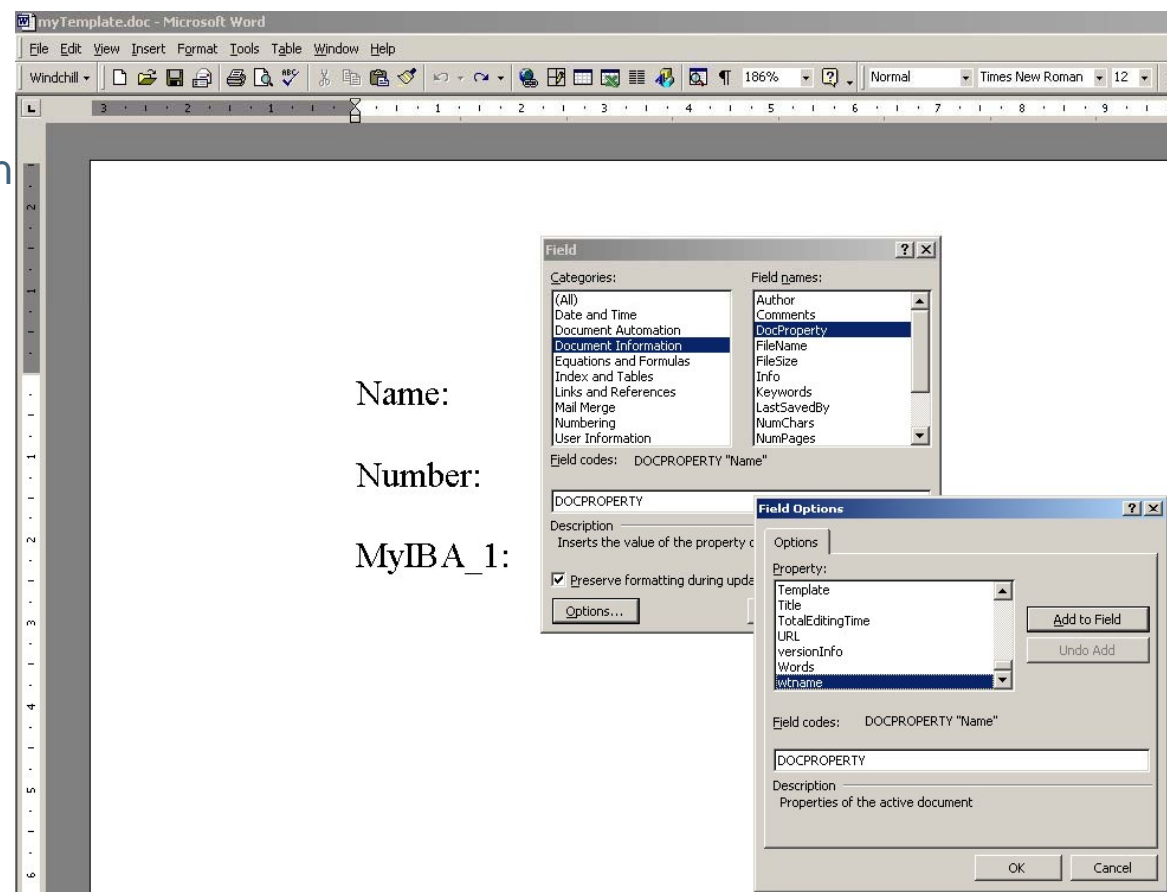
Mapping Attributes to Document CONTENT

Pattern

- Customer wants the Color Attribute linked to a specific word in the document.

Mechanism #1: Field Insertion
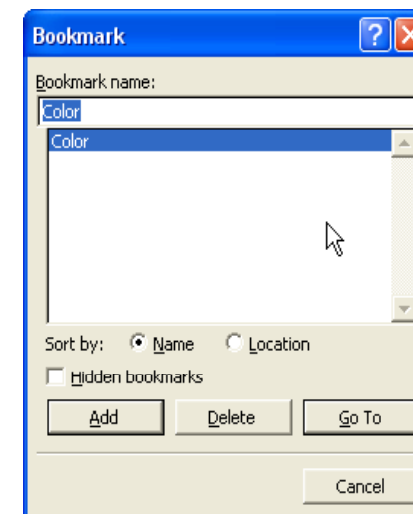
Insert fields into MSWord template

- From the MSWord menu:
  - Insert/Field
- In the "Field" pane:
  - Document Information
  - DocProperty
- Click on "Options"
- In "Field Options" :
  - Select an attribute
- Click on "Add to field"

Mechanism #2: Creating Associations using bookmarks

Pattern

- Customer wants the Color Attribute linked to a specific word in the document.

Creating Associations using bookmarks (cont'd)

Mechanism

- Map the attribute to a Bookmark in the document

Link the Bookmark that was just created to the Attribute:

- Now when you change the Word in the Document to another color, the attribute is automatically updated.

- Think of this like Pro/E parameters, when the value is changed in the model (or in this case, the document), the result can be seen in the PDMLink UI.
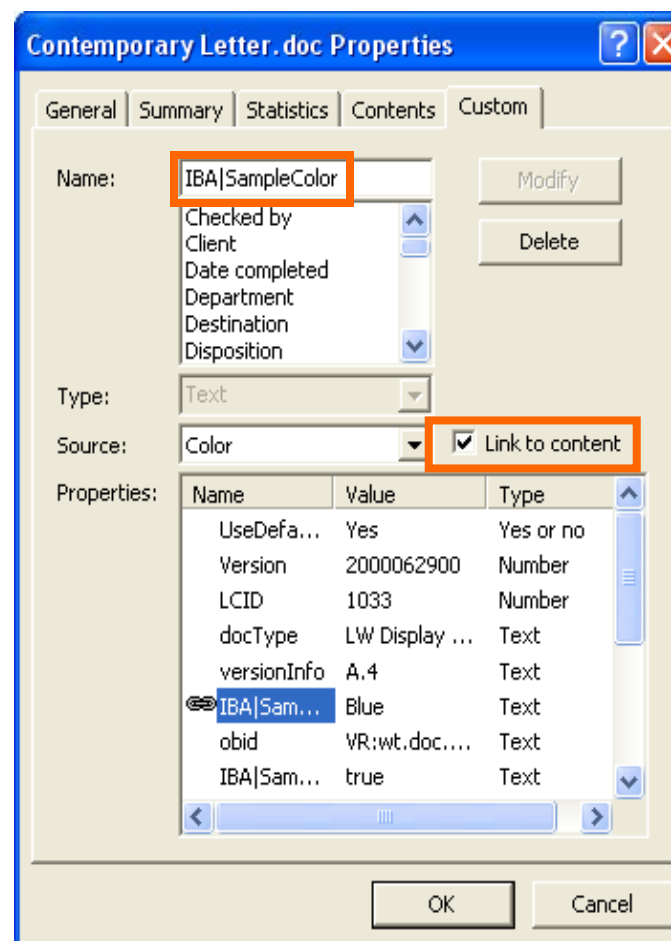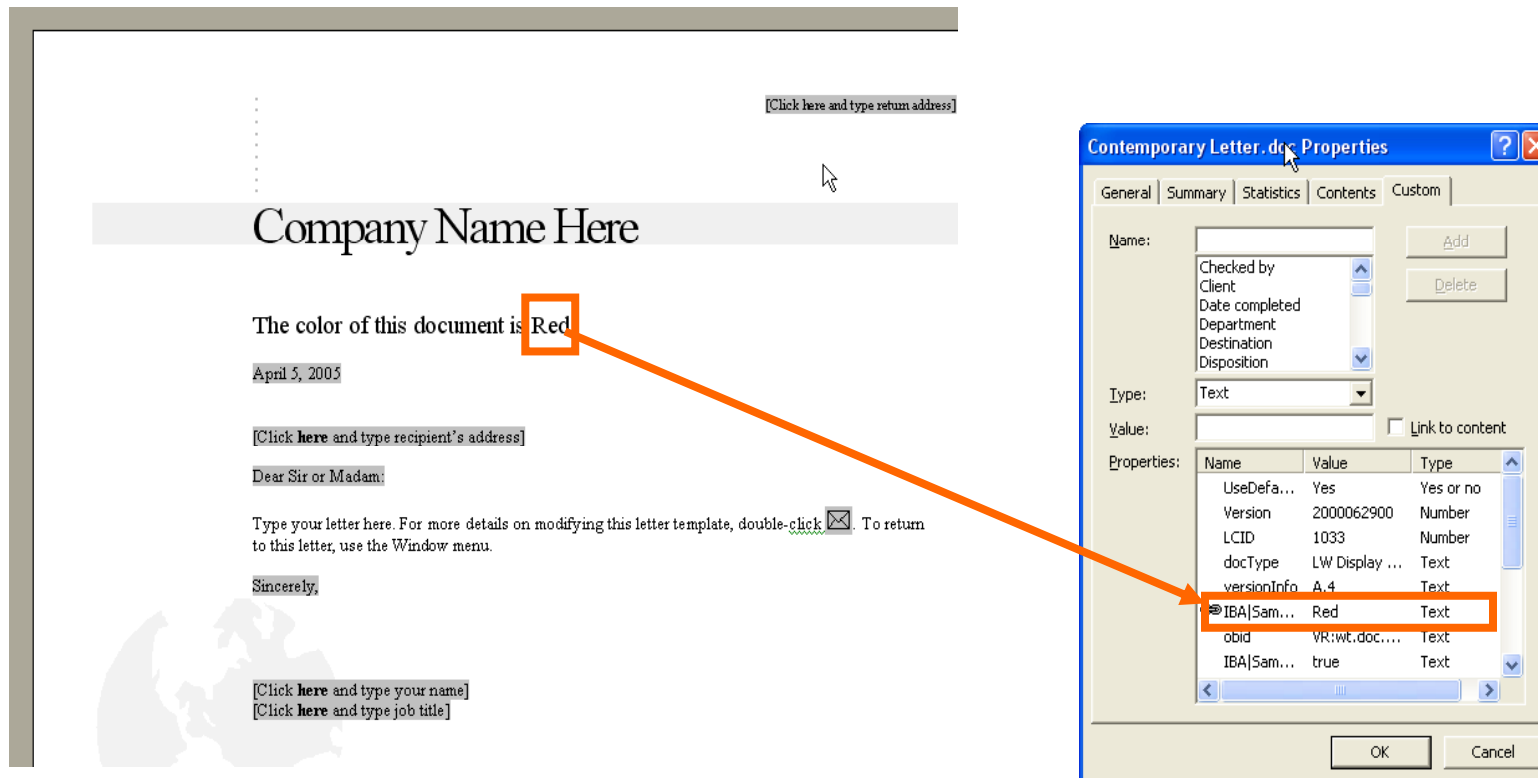
Creating Associations using bookmarks (cont'd)

Update the Document to Red Instead of Blue

- Notice that the field was also updated
- You can now update the document and the IBA will be updated

Creating Associations using bookmarks (cont'd)

The IBA is updated
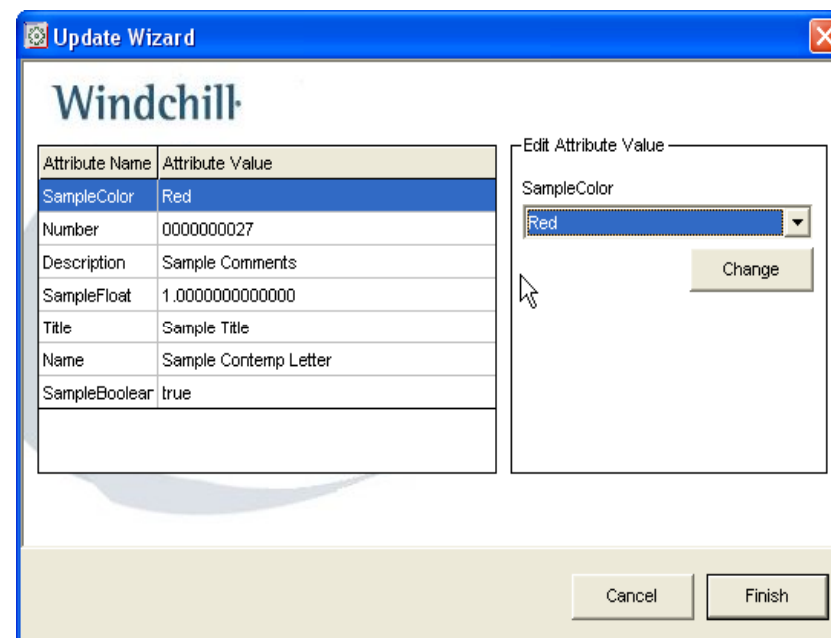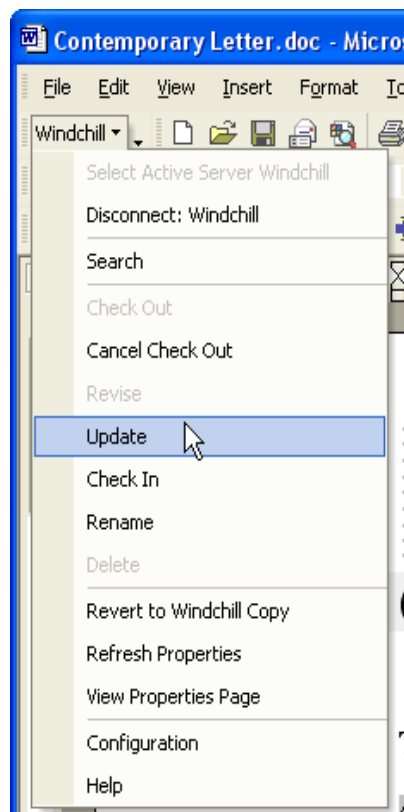
How about Excel?

The mechanism is slightly different in Excel
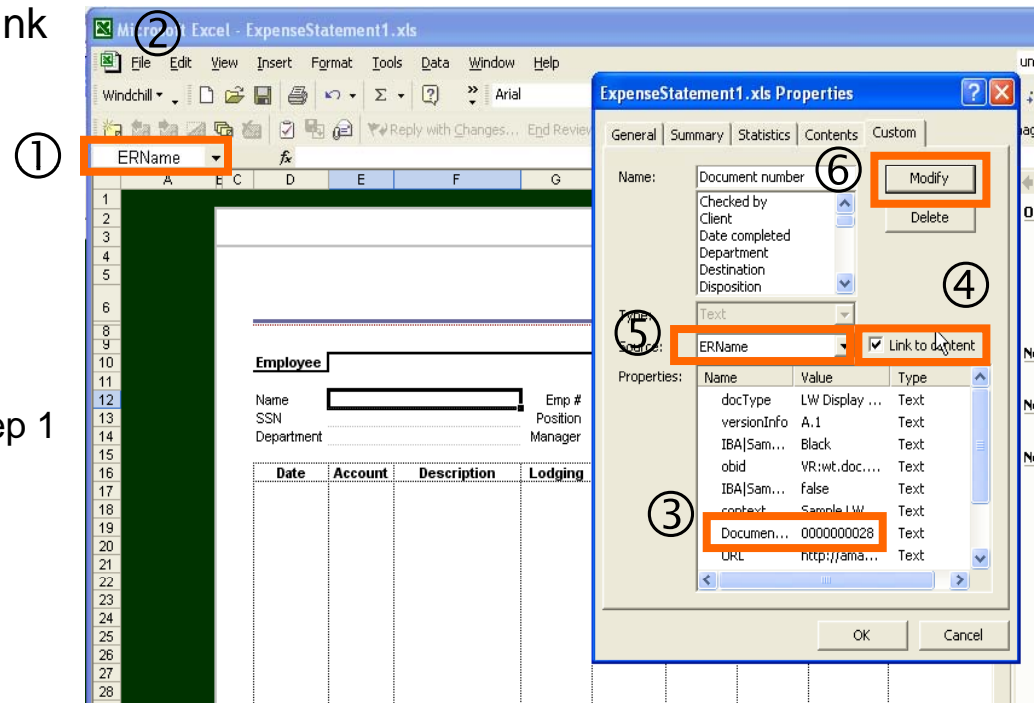
○ Cell Name is used to create the link

Steps

1. Rename the field to be linked

2. Display the File | Properties Menu

3. Select the Attribute

4. Select Link to Content

5. Select the Field Name specified in Step 1

6. Select Modify

For serious documentation needs, use ArborText Editor

Of course, all of this and more is available by using PTC's document authoring solution, ArborText Editor.