



# 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

The first screenshot shows the Windchill home page with the 'Software Downloads' section. A black arrow points to the 'Software Downloads' link in the left sidebar. Another black arrow points to the 'Setup and Installation 7.0' section, which contains links for 'Bootstrap Loader Installation', 'ProductView Installation', and 'Windchill Desktop Integration 2.0 Installation'.

The second screenshot shows the 'Edit User Preferences' page with the 'Content' tab selected. An orange arrow points to the 'Download Operation Type' preference, which is set to 'Always open in application'.

The third screenshot shows the 'Desktop Integration File Download Option' preference, which is set to 'Always use Desktop Integration'.

- 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

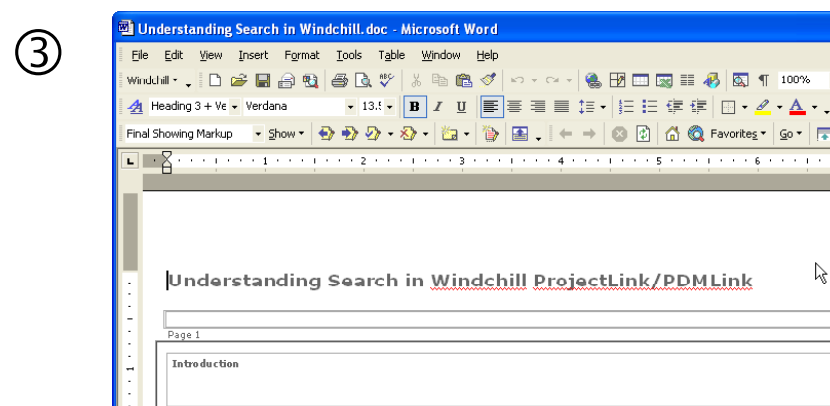
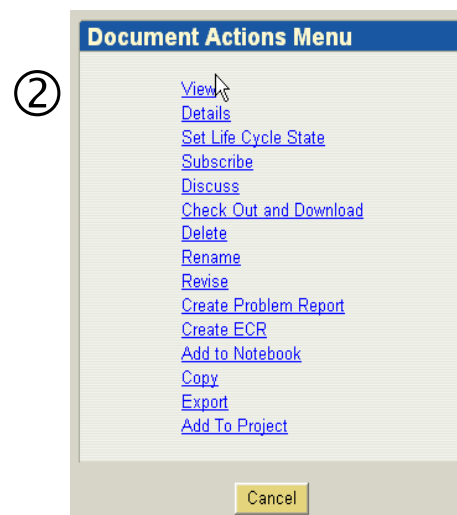
### Usage Scenario

- o 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

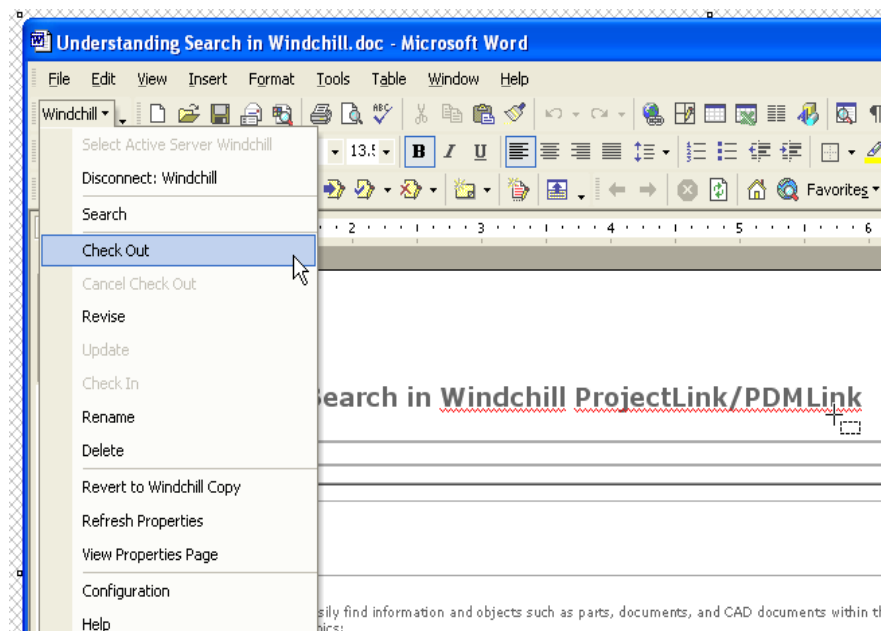
Simply clicking the name of the document will achieve the same result with only one click!



## 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”

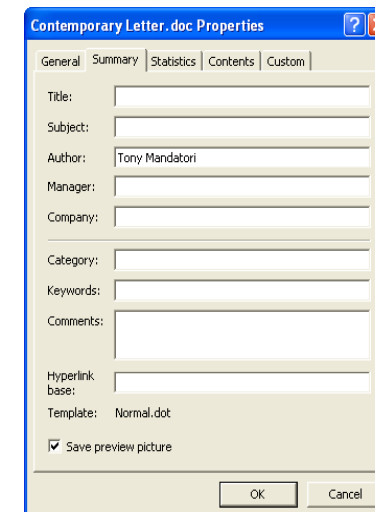
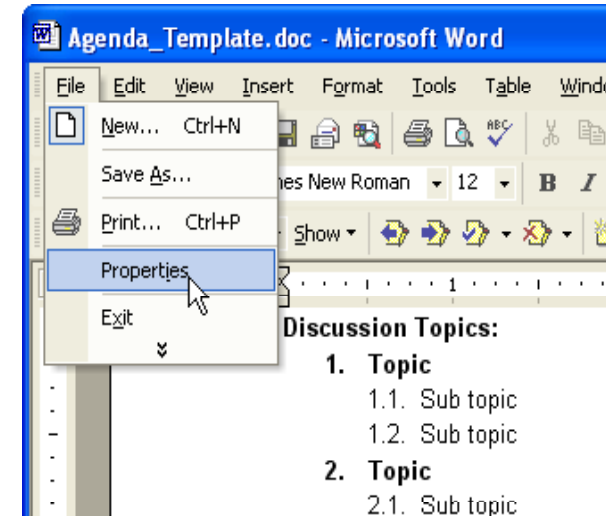


## Document Properties

All MS Office Documents will have Document Properties

Standard MS Document Properties include:

- Title
- Subject
- Author



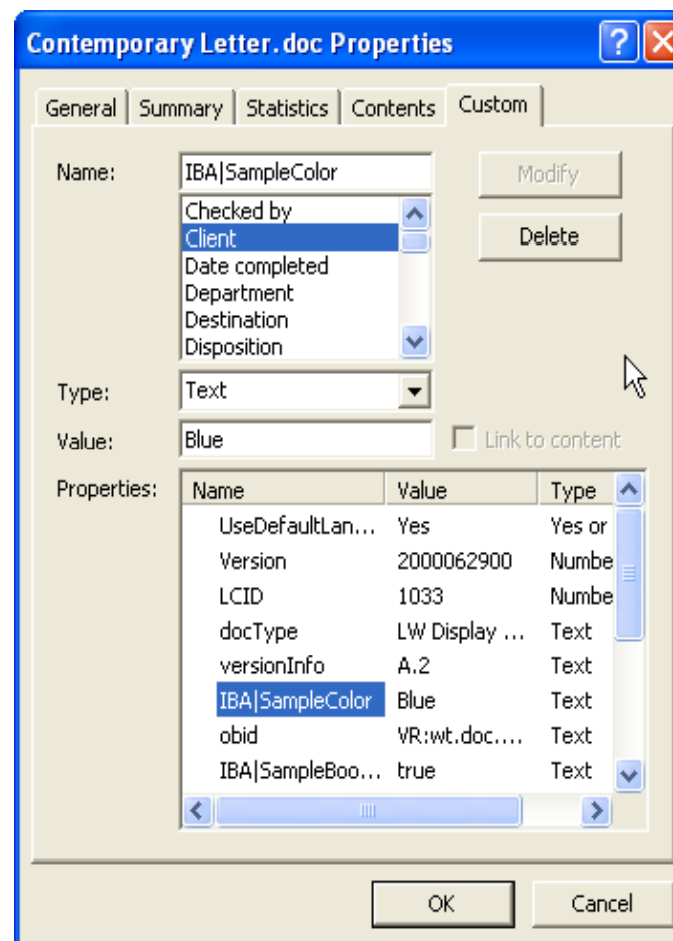
## Document Properties (cont'd)

### 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.

The screenshot shows the 'Contemporary Letter.doc Properties' dialog box with the 'Summary' tab selected. The dialog has a blue title bar with a question mark and a close button. Below the title bar are tabs for 'General', 'Summary', 'Statistics', 'Contents', and 'Custom'. The 'Summary' tab contains several text input fields: 'Title' (Sample Title), 'Subject' (Sample Subject), 'Author' (Tony Mandatori), 'Manager' (empty), 'Company' (empty), 'Category' (Sample Category), 'Keywords' (Sample keywords), and 'Comments' (Sample Comments). There is also a 'Hyperlink base' field (empty) and a 'Template' dropdown set to 'Normal.dot'. At the bottom, there is a checked checkbox for 'Save preview picture' and 'OK' and 'Cancel' buttons.

# Updating Document Attributes

Run the Update Wizard by selecting Windchill Update

**Contemporary Letter.doc Properties**

General | Summary | Statistics | Contents | Custom

Title: Sample Title

Subject: Sample Subject

Author: Tony Mandatori

Manager:

Company:

Category: Sample Category

Keywords: Sample keywords

Comments: Sample Comments

Hyperlink base:

Template: Normal.dot

Save preview picture

OK Cancel

**Update Wizard**

**Windchill**

Attribute Name	Attribute Value
SampleColor	Blue
Number	0000000027
Description	Sample Comments
SampleFloat	1.00000000000000
Title	Sample Title
Name	Sample Contemp Letter
SampleBoolean	true

Edit Attribute Value

SampleColor

Blue

Change

Cancel Finish

**Sample Contemp Letter** View Go

Sample Comments

**Responsible Product:** Sample LW Product

**Number:** 0000000027

**Name:** Sample Contemp Letter

**Title:** Sample Title

**Version:** A.3

**Type:** LW Display Name

**Status:** Work in progress ([Details of original](#))

**Team:** 0000000027 - Sample Contemp Letter A231

**State:** In Work - Released - Cancelled

**Location:** / Sample LW Product

**Primary:** Contemporary Letter.doc

**Format:** Microsoft Word

**File Size:** 31.5 KB

**Last Updated:** 2005-04-04 17:00:11 EDT

**Created By:** Lightweight User

**Created:** 2005-04-04 16:19:14 EDT

**Updated By:** Lightweight User

**Last Updated:** 2005-04-05 11:25:37 EDT

**SampleBoolean:** true

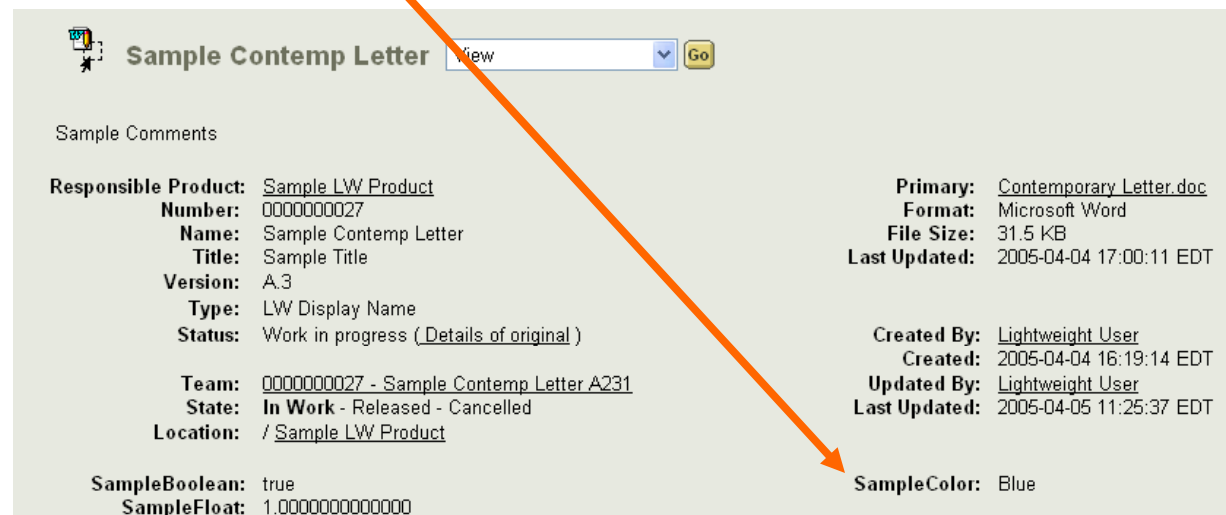
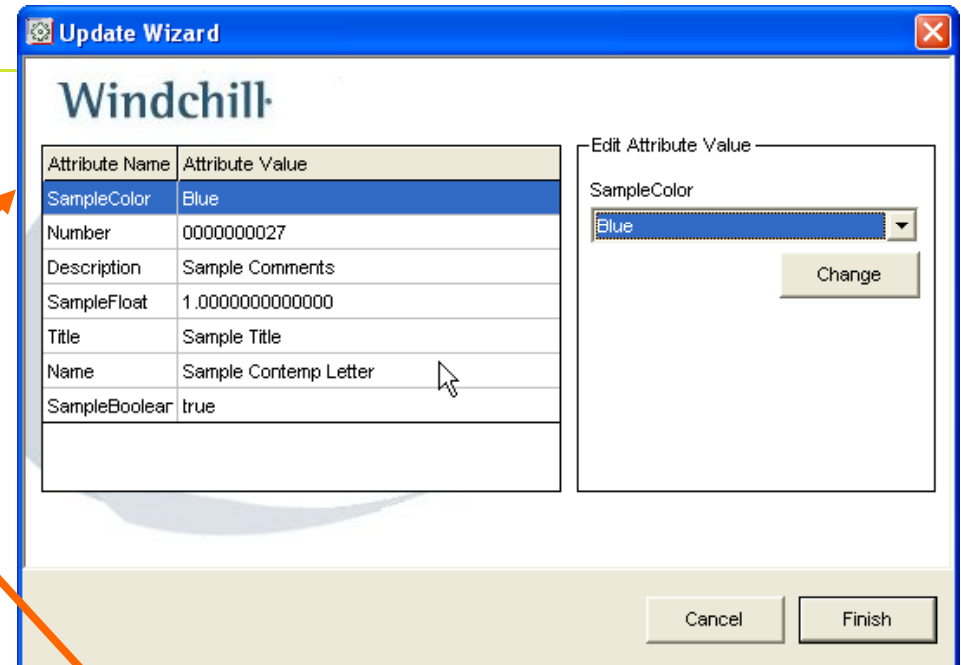
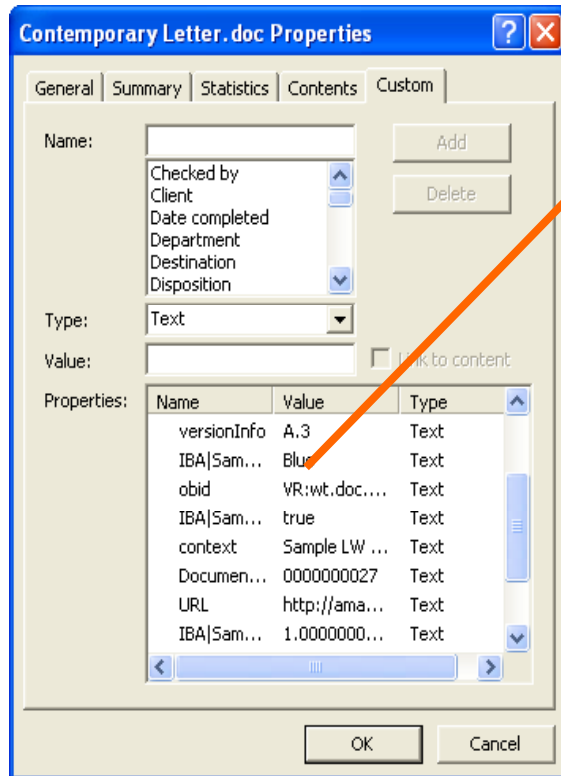
**SampleFloat:** 1.00000000000000

**SampleColor:** Blue



# Updating IBA's

IBA's are updated in a similar fashion



## Soft Attribute Mapping

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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

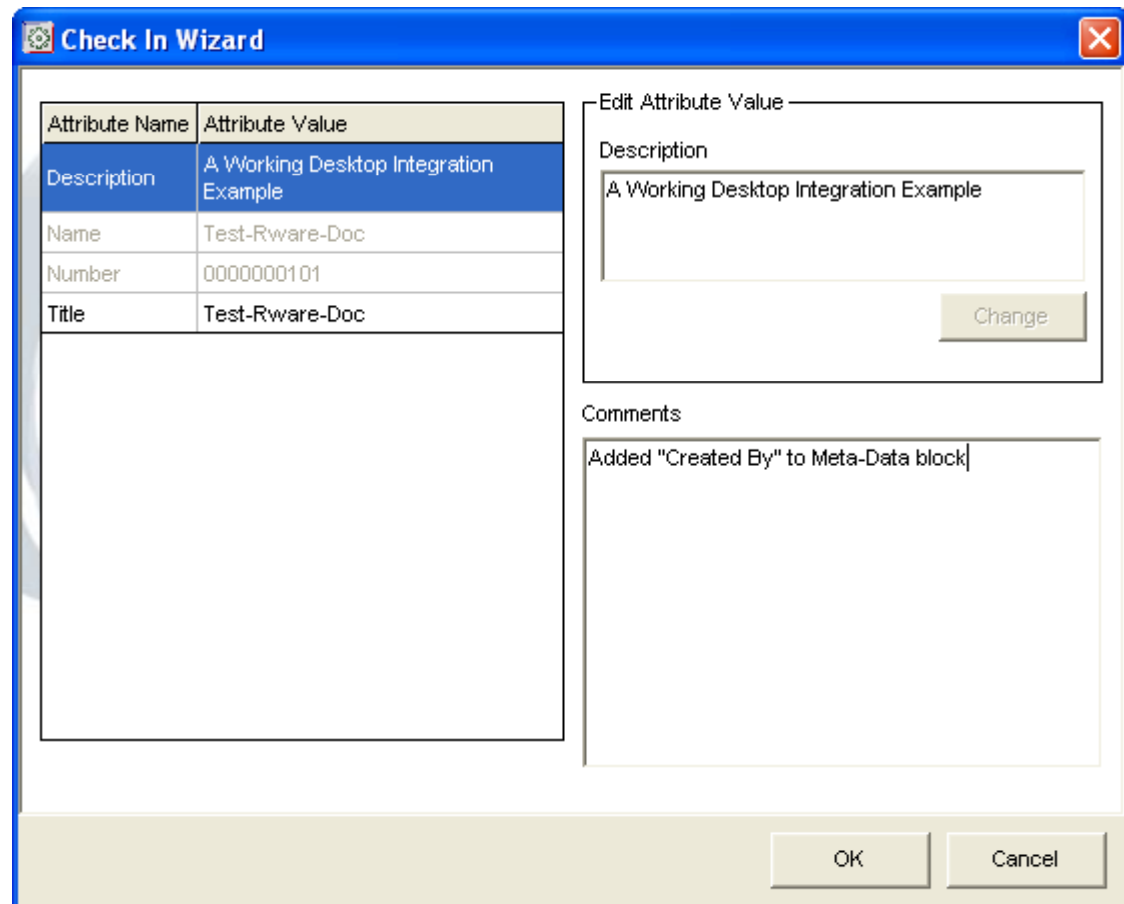
\*\* In Summary Tab

**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



Attribute Name	Attribute Value
Description	A Working Desktop Integration Example
Name	Test-Rware-Doc
Number	0000000101
Title	Test-Rware-Doc

Edit Attribute Value

Description

A Working Desktop Integration Example

Change

Comments

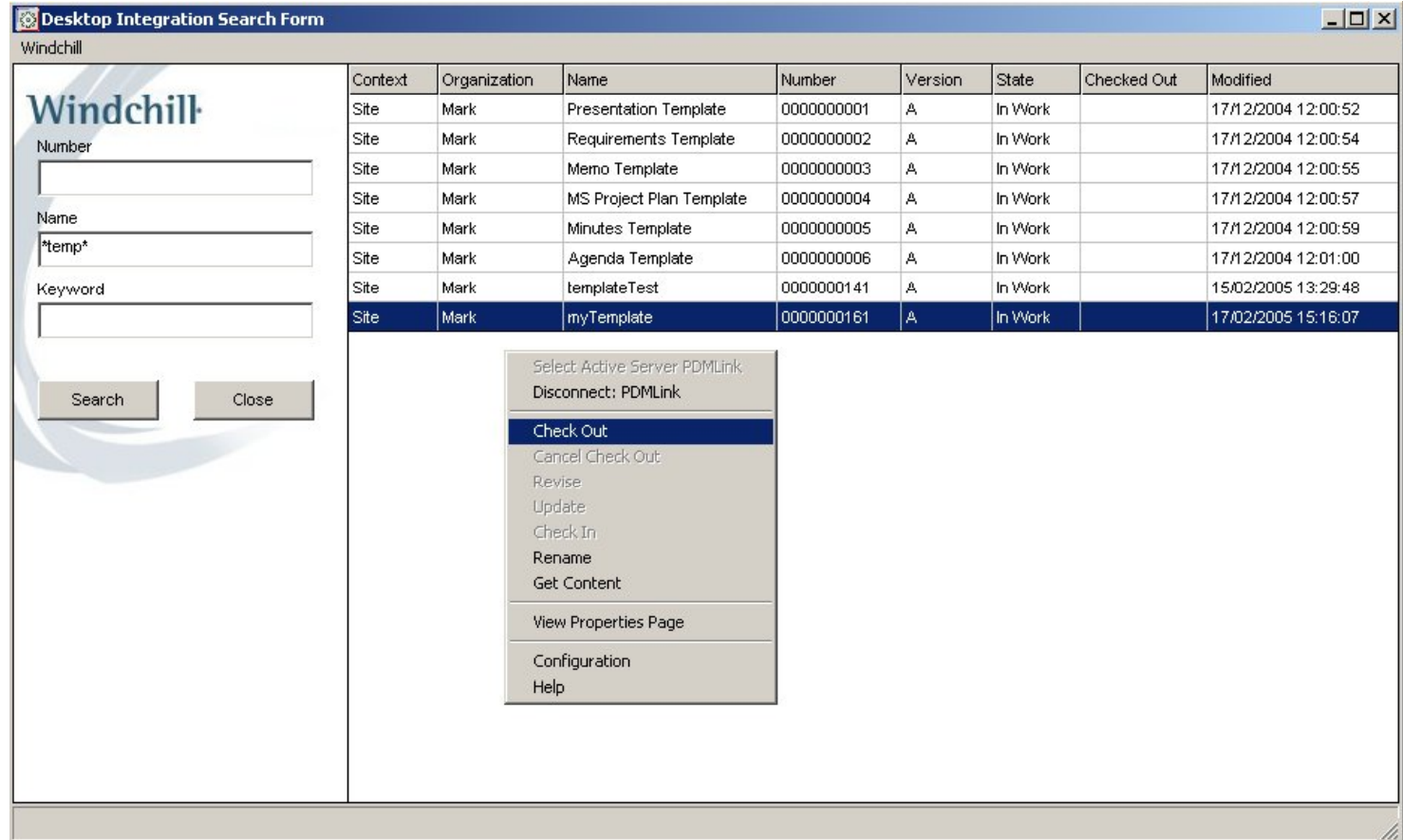
Added "Created By" to Meta-Data block

OK Cancel

# Search

## Search for template in Desktop Integration

- CheckOut the document template using the Right Mouse Button



The screenshot shows the 'Desktop Integration Search Form' window in Windchill. On the left, there is a search panel with the following fields and buttons:

- Number:
- Name:
- Keyword:
- Buttons: Search, Close

The main area displays a table of search results:

Context	Organization	Name	Number	Version	State	Checked Out	Modified
Site	Mark	Presentation Template	0000000001	A	In Work		17/12/2004 12:00:52
Site	Mark	Requirements Template	0000000002	A	In Work		17/12/2004 12:00:54
Site	Mark	Memo Template	0000000003	A	In Work		17/12/2004 12:00:55
Site	Mark	MS Project Plan Template	0000000004	A	In Work		17/12/2004 12:00:57
Site	Mark	Minutes Template	0000000005	A	In Work		17/12/2004 12:00:59
Site	Mark	Agenda Template	0000000006	A	In Work		17/12/2004 12:01:00
Site	Mark	templateTest	0000000141	A	In Work		15/02/2005 13:29:48
Site	Mark	myTemplate	0000000161	A	In Work		17/02/2005 15:16:07

A context menu is open over the 'myTemplate' row, showing the following options:

- Select Active Server PDMLink
- Disconnect: PDMLink
- Check Out** (highlighted)
- Cancel Check Out
- Revise
- Update
- Check In
- Rename
- Get Content
- View Properties Page
- Configuration
- Help

## Mapping Attributes to Document CONTENT

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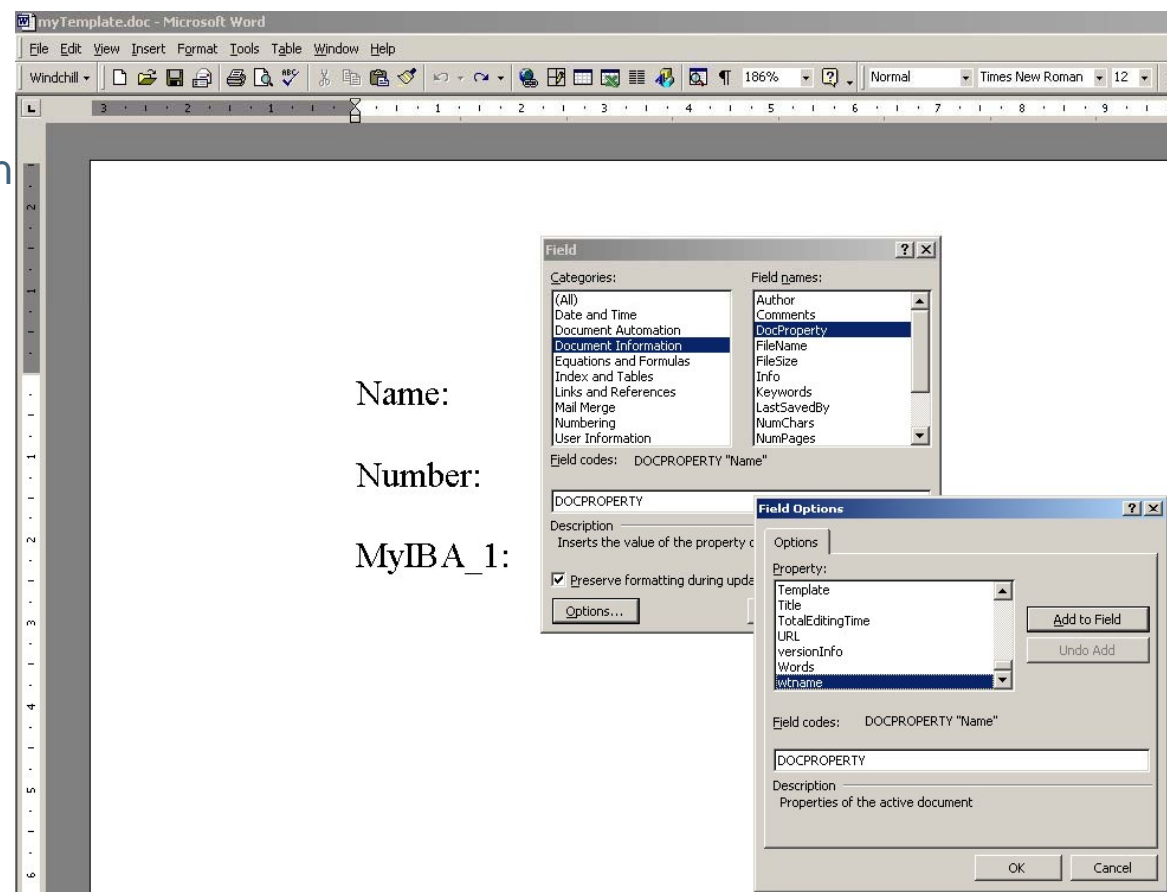
### Pattern

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

## Mechanism #1: Field Insertion

### Insert fields into MSWord template

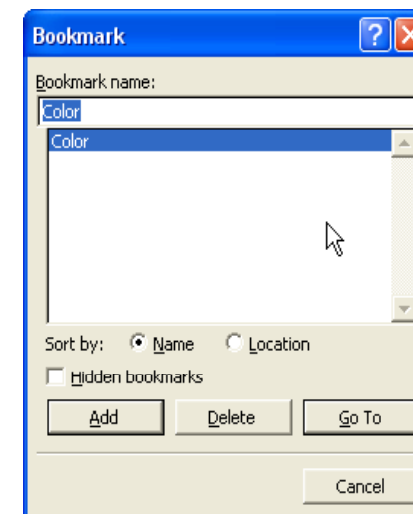
- From the MSWord menu:
  - Insert/Field
- In the “Field” pane:
  - Document Information
  - DocProperty
- Click on “Options”
- In “Field Options” :
  - Select an attribute
- Click on “Add to field”



## Mechanism #2: Creating Associations using bookmarks

### Pattern

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



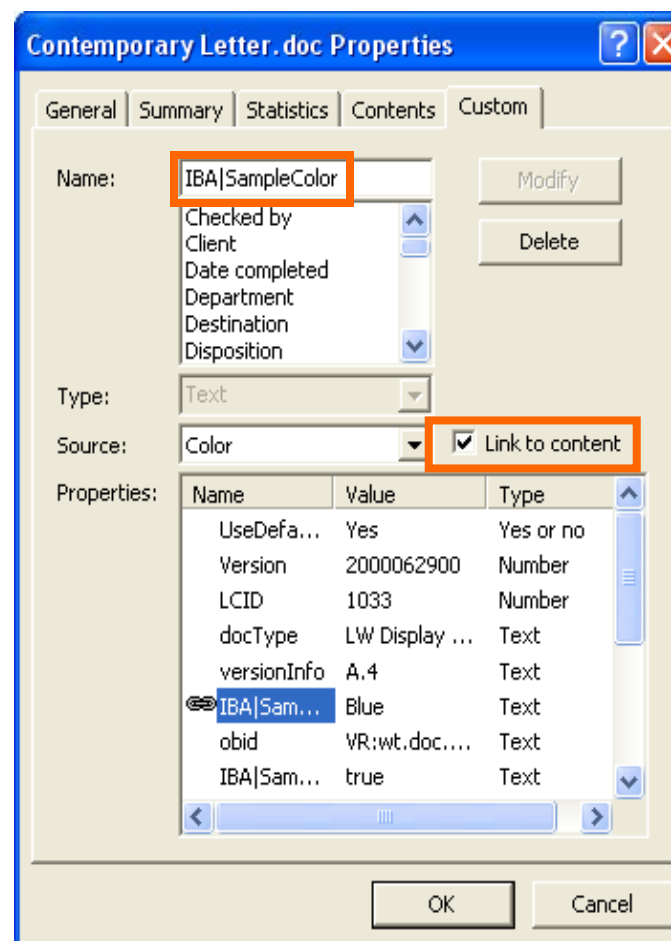
## Creating Associations using bookmarks (cont'd)

### 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.

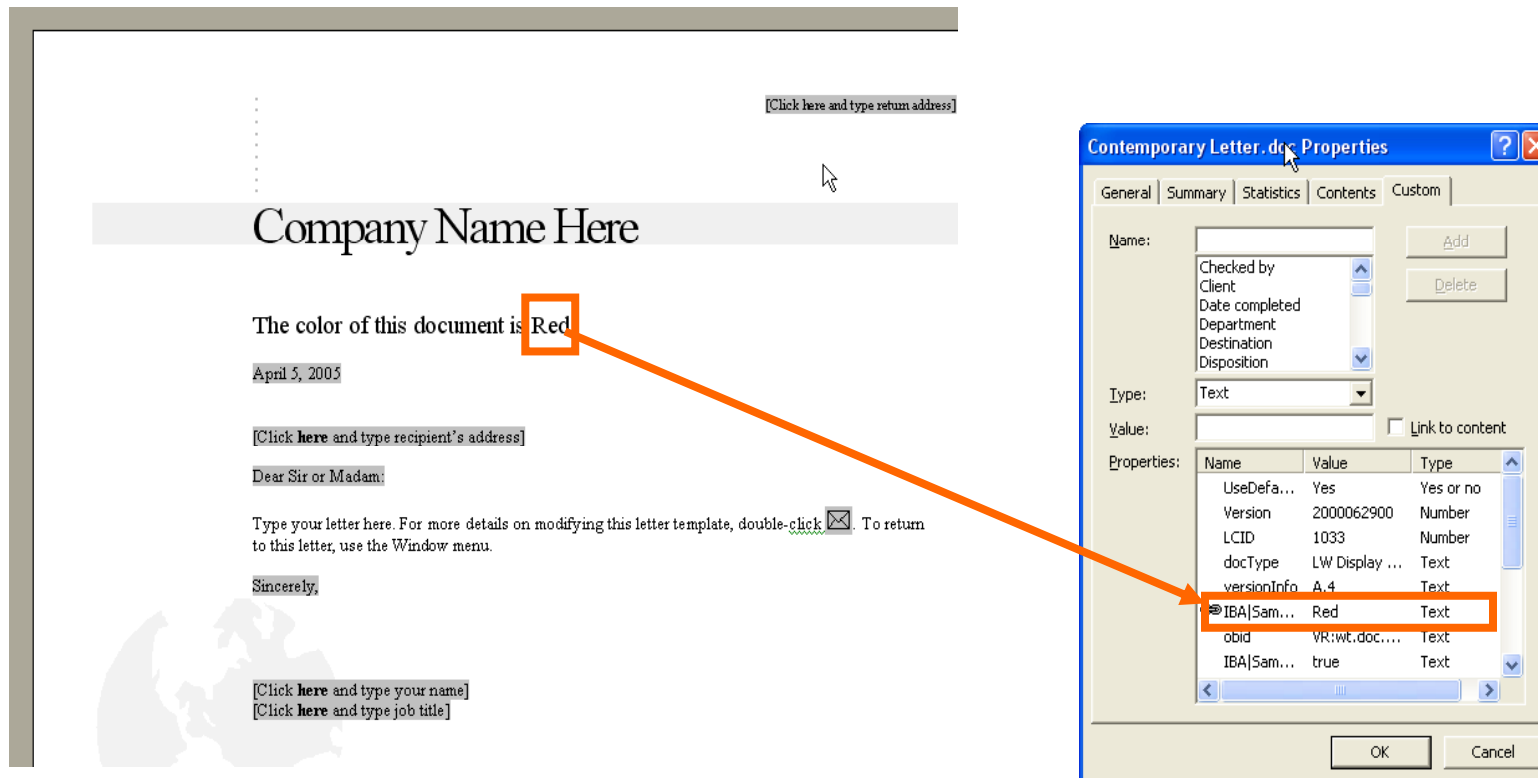




## Creating Associations using bookmarks (cont'd)

### 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




The color of this document is Red

April 5, 2005

[Click here and type recipient's address]

Dear Sir or Madam:

Type your letter here. For more details on modifying this letter template, double-click . To return to this letter, use the Window menu.

Sincerely,

[Click here and type your name]  
[Click here and type job title]

Contemporary Letter.doc Properties

General Summary Statistics Contents Custom

Name:  Add Delete

Checked by  
Client  
Date completed  
Department  
Destination  
Disposition

Type: Text

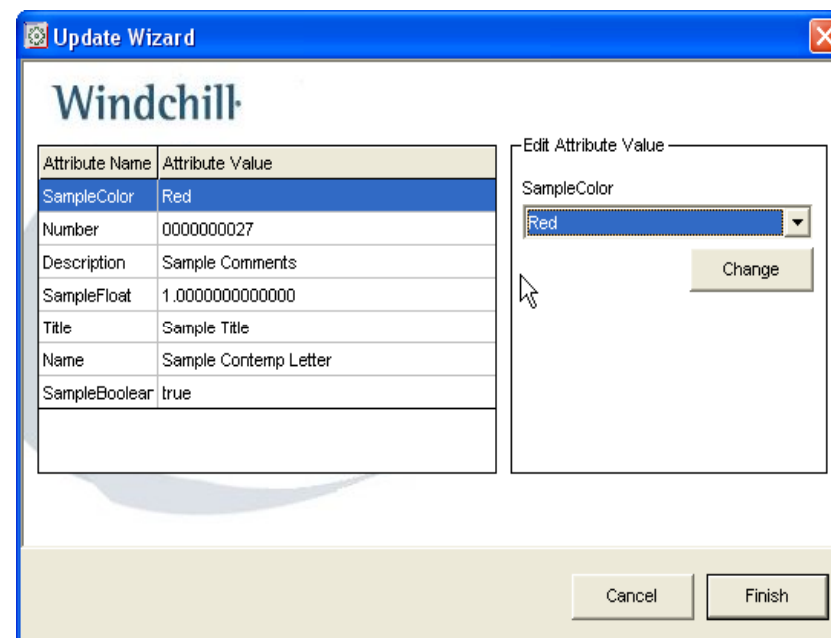
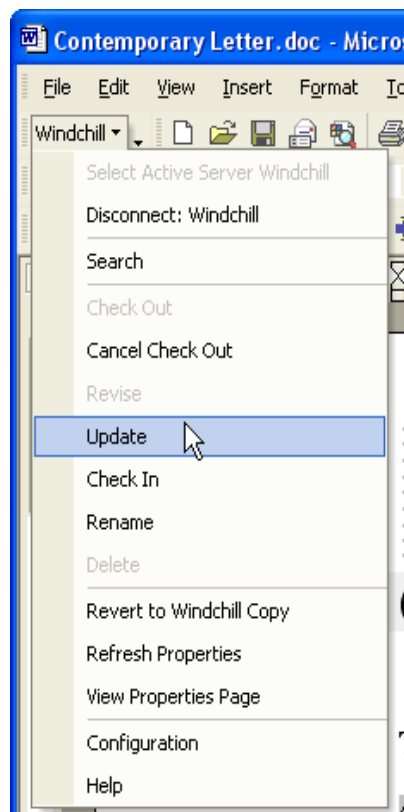
Value:   Link to content

Name	Value	Type
UseDefa...	Yes	Yes or no
Version	2000062900	Number
LCID	1033	Number
docType	LW Display ...	Text
versionInfo	A.4	Text
IBA Sam...	Red	Text
obid	VR:wt.doc....	Text
IBA Sam...	true	Text

OK Cancel

## Creating Associations using bookmarks (cont'd)

The IBA is updated



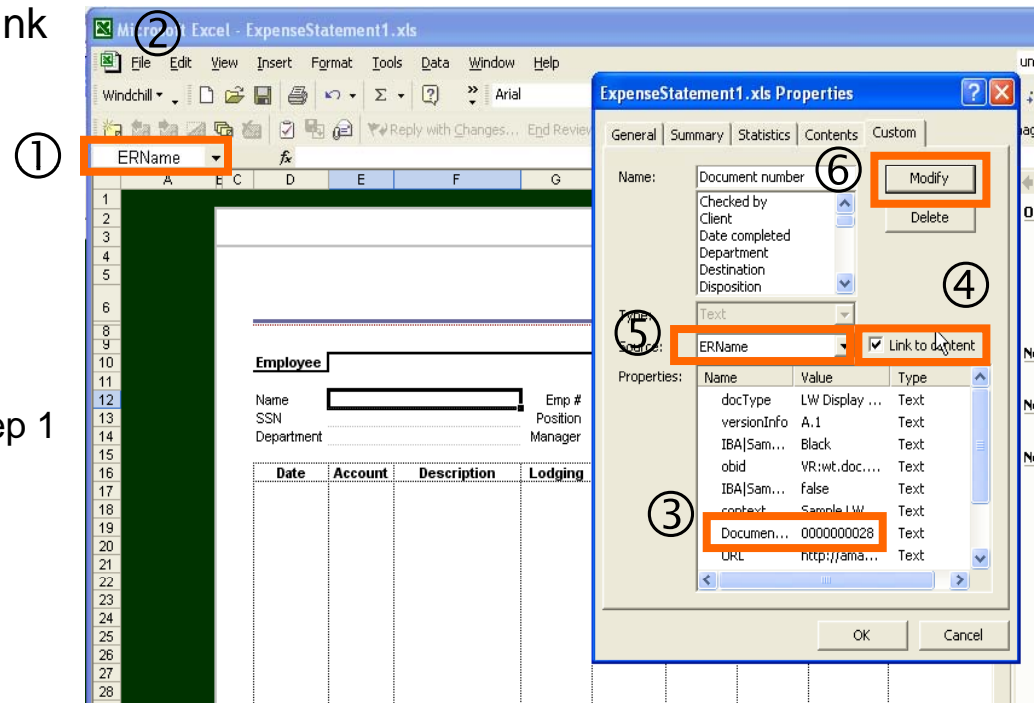
## How about Excel?

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.

