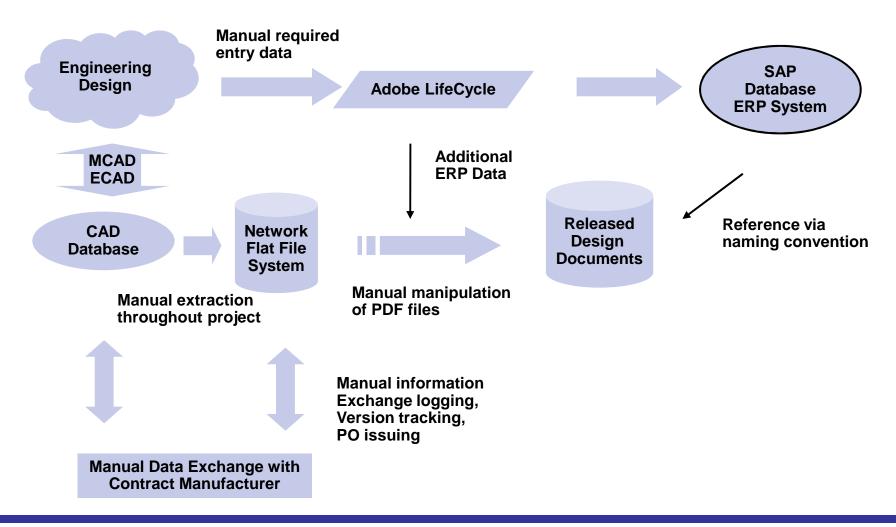
PDMLink/ProjectLink Uniqueness Solution

Focused on WTPart, WTDocument and EPMDocument

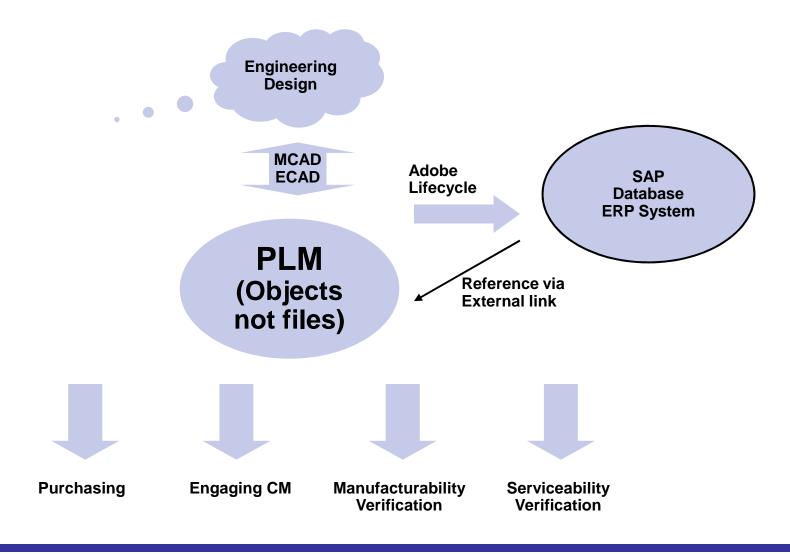
Objective

A "to be" vision of a complete business system encapsulating ERP and PLM systems in COM DEV.

Current Process

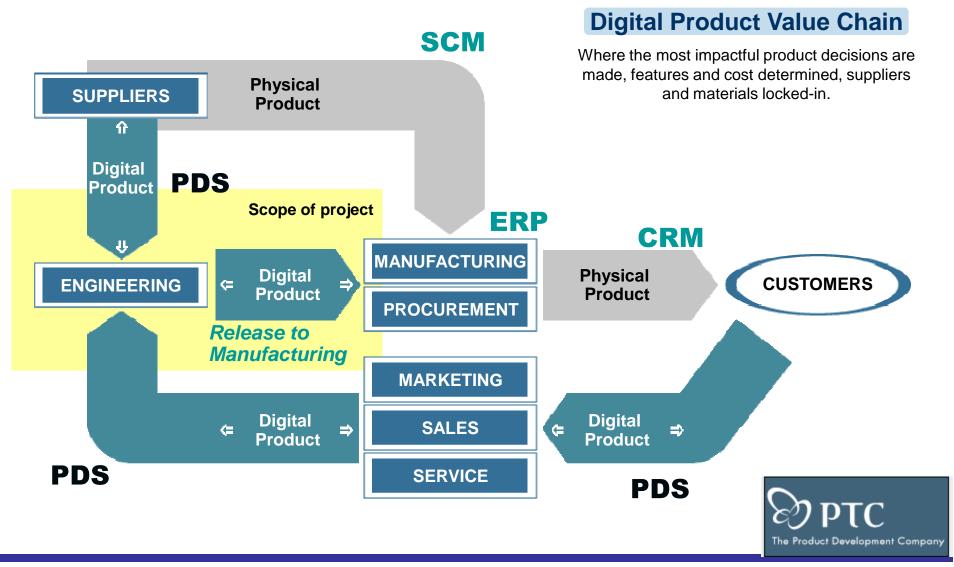


Process After Stage 2 with PLM

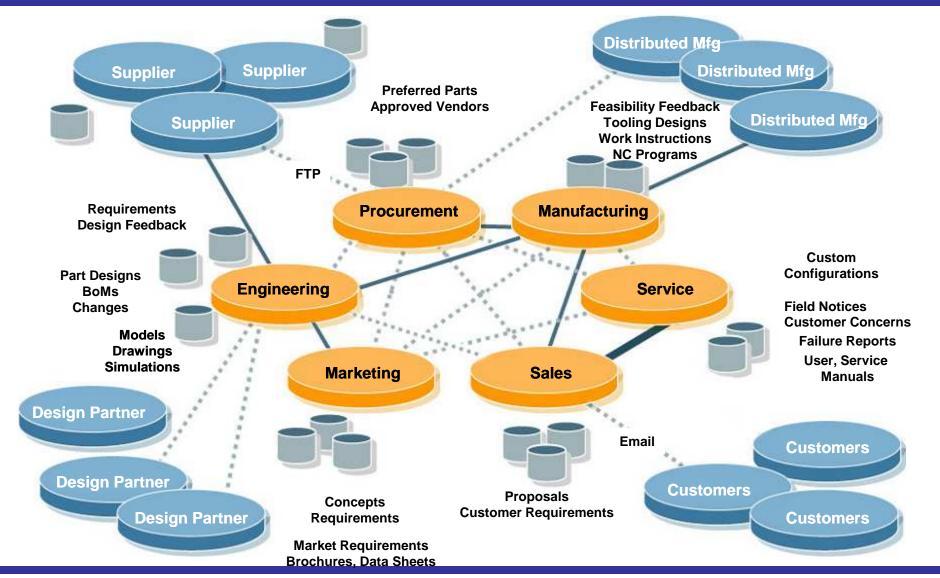




Completely in Sync with PTC Vision

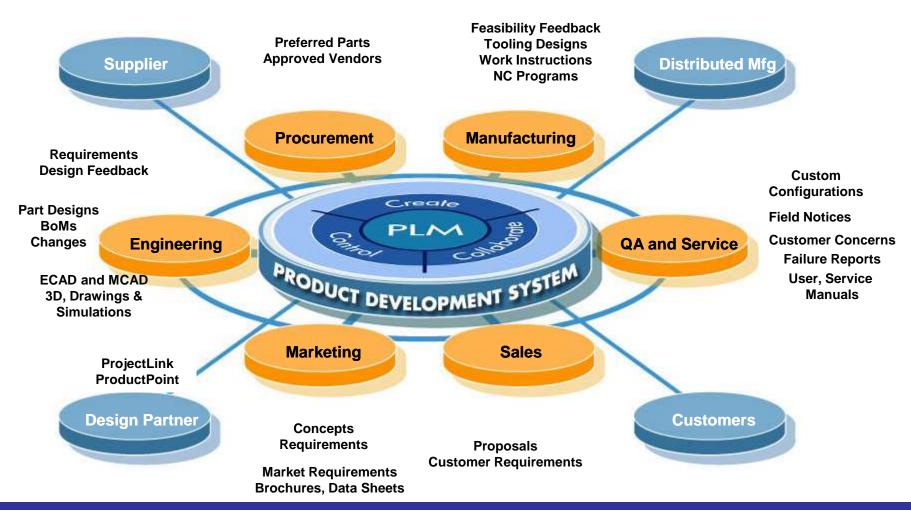


Product Development Today



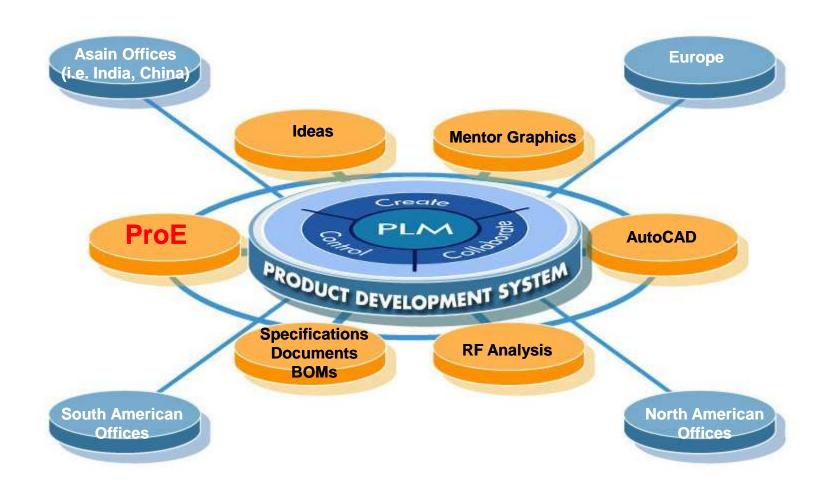


Optimized Product Development System





Optimized Engineering Application Focused



Standard Global Business Practice

- In an organization, the number is unique to identify a part.
- Types Documents that describe the part can be numbered identical to the part number.
- Documents of the same type have a unique number.

Duplication between Project and PDMLink

- Duplication is due to the fact that ProjectLink and PDMLink started and can be sold as separate systems. The duplication was allowed to make migration of the solutions easier. But it does not follow the business enterprise solution.
- All Com Dev IP Part information is properly numbered and checked into the common PDMLink. There cannot be duplication of Part Numbers.
- ProjectLink is used as a collaboration sharing portal for external ODMs for intellectual property. ODMs can create designs to be approved and checked back into/"SEND TO PDM" the common PDMLink.
- Depending on CAD authoring application and author, CAD files are numbered according to the Part Number
- With various CAD authoring applications of Ideas, ProE and Mentor, the files are numbered according to the Part Number
- There can only be one unique number per CAD/DOC type that corresponds to COMDEV Part.



Step 1 – User Down Time

- Applying this solution must take place on mirrored development, test and then production in that order when users are notified not to use the system.
- Prior to implementing on Production, it is advised to perform rigorous testing on development and test after implementing the solution

Step 2 – Finding Duplicates

- Duplication between Project and PDMLink allowed for WTParts, WTDocuments and EPMDocuments
 - Allowed to create, modify, approve and revise duplicate items in either ProjectLink and PDMLink

```
SQL> SELECT WTKEY FROM WTPARTMASTERKEY GROUP BY WTKEY HAVING COUNT(*) > 1;
SQL> SELECT WTKEY FROM WTDOCUMENTMASTERKEY GROUP BY WTKEY HAVING COUNT(*) > 1;
SQL> SELECT WTKEY FROM EPMDOCUMENTMASTERKEY GROUP BY WTKEY HAVING COUNT(*) > 1;
```

or

SQL> SELECT WTPARTNUMBER FROM WTPARTMASTER GROUP BY WTPARTNUMBER HAVING COUNT(*) > 1; SQL> SELECT WTDOCUMENTNUMBER FROM WTDOCUMENTMASTER GROUP BY WTDOCUMENTUMBER HAVING COUNT(*) > 1;

SQL> SELECT DOCUMENTNUMBER FROM EPMDOCUMENTMASTER GROUP BY DOCUMENTNUMBER HAVING COUNT(*) > 1;



Step 3 – Renumbering Duplicates

- A decision is made to renumber the object in either ProjectLink or PDMLink using UI of Windchill
- At site level using Windchill Search, search for the number and select Rename in the Actions link.
- Enter a new number and filename then select OK
 - Most cases, I would renumber and change the filename of the ProjectLink objects to:

Number: $1234567 \rightarrow 1234567$ _projectname

Filename: $1234567.prt \rightarrow 1234567_projectname.prt$

 Rerun the SQLs in step 1 to confirm that you did not renumber or change the file name that exist in another project.

Step 4 – Adding More Doctypes to Sychronize with File Extensions

• Depending on your CAD tool, you may need to add more doctypes

Step 5 – Current Oracle Unique Indexes in Windchill

Currently uniqueness is based on

For WTPART

WTPARTMASTERKEY\$UNIQUE ON WTPARTMASTERKEY Table
WTKEY, IDA3ORAGANIZATIONREFERENCE, IDA3NAMESPACEREFERENCE

For WTDOCUMENT

WTDOCUMENTMASTERKEY\$UNIQUE ON WTDOCUMENTMASTERKEY Table WTKEY, IDA3ORAGANIZATIONREFERENCE, IDA3NAMESPACEREFERENCE

For EPMDOCUMENT

EPMDOCUMENTMASTERKEY\$UNIQUE ON EPMDOCUMENTMASTERKEY Table WTKEY, IDA3ORAGANIZATIONREFERENCE, IDA3NAMESPACEREFERENCE

Step 5 – New Oracle Unique Indexes to Enforce Uniqueness in PLM

 In SQLPLUS logged in as the Windchill oracle user, run the following command to drop and recreate the new unique indexes*

SQL> drop index WTPartMasterKey\$UNIQUE;

SQL> drop index WTDocumentMasterKey\$UNIQUE;

SQL> drop index EPMDocumentMasterKey\$UNIQUE;

SQL> CREATE UNIQUE INDEX WTPartMasterKey\$UNIQUE ON WTPartMasterKey(wtkey,idA3organizationReference) TABLESPACE INDX STORAGE (INITIAL 20k NEXT 20k PCTINCREASE 0);

SQL> CREATE UNIQUE INDEX WTDocumentMasterKey\$UNIQUE ON WTDocumentMasterKey(wtkey,idA3organizationReference) TABLESPACE INDX STORAGE (INITIAL 20k NEXT 20k PCTINCREASE 0);

Or SQL> CREATE UNIQUE INDEX WTDocumentMaster\$UNIQUE ON WTDocumentMaster(WTdocumentnumber,doctype,idA3organizationReference) TABLESPACE INDX STORAGE (INITIAL 20k NEXT 20k PCTINCREASE 0);

SQL> CREATE UNIQUE INDEX EPMDocumentMaster\$UNIQUE ON

EPMDocumentMaster(documentnumber,doctype,authoringapplication,idA3organizationReference) TABLESPACE INDX STORAGE (INITIAL 20k NEXT 20k PCTINCREASE 0);

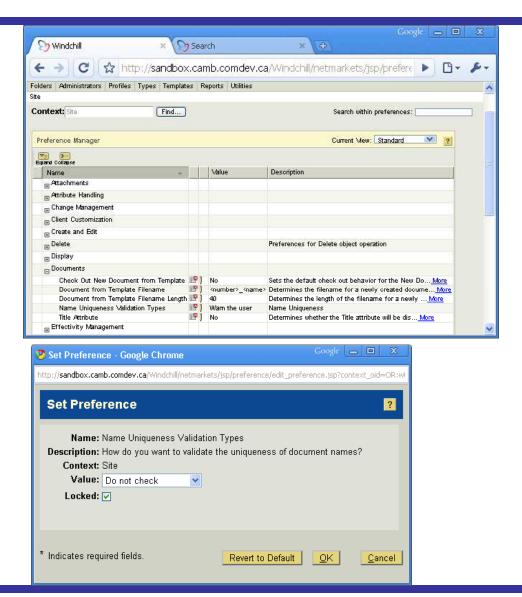
SQL> CREATE UNIQUE INDEX EPMDocumentMasterFile\$UNIQUE ON

EPMDocumentMaster(cadname,authoringapplication,idA3organizationReference) TABLESPACE INDX STORAGE (INITIAL 20k NEXT 20k PCTINCREASE 0);

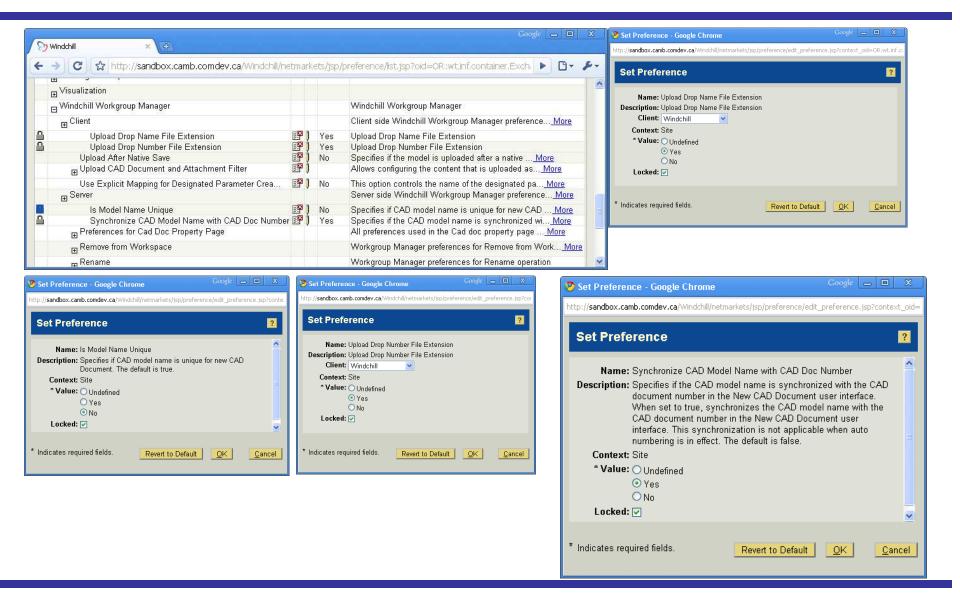


Step 6 – Updating Site Preferences

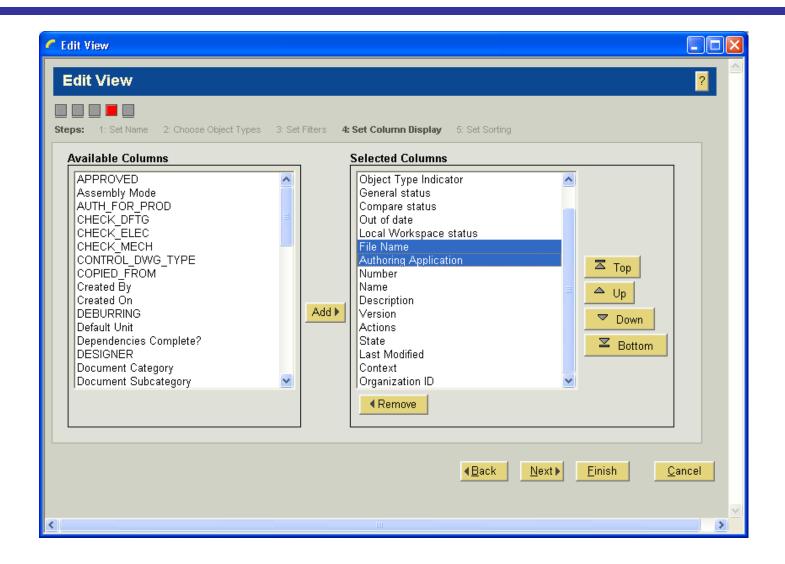
Documents



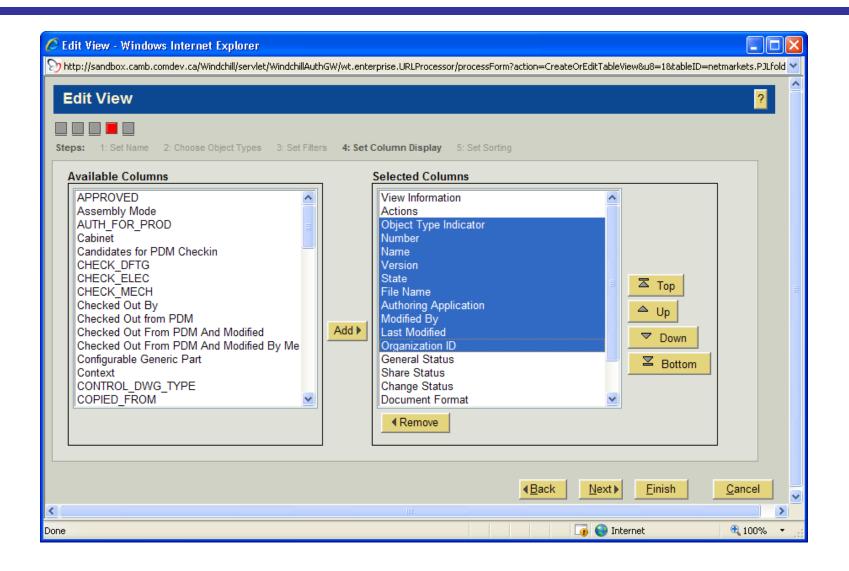
Step 6 – Updating Site Preferences - Windchill Workgroup Manager



Step 7 – Updating Table Views in Windchill Workgroup Manager



Step 7 – Updating Table Folder Views in Contexts (Products, Projects & Libraries)



Step 8 – Additional Steps. Must do if this solution is applied prior to Upgrade

- In Pro/E WGM, it performs file name uniqueness in a API which is not necessary and redundant because it is already performed at the database level. This must be removed or disabled via PTC support or customization.
- *During upgrades, prior to Adding Constraints stage in the upgrade, the \$WT_HOME/Upgrade/Upgrade/UpgradePhases/AddConstraints/UniqueWork.sql must be modified to accommodate the new unique indexes.
- CREATE UNIQUE INDEX EPMDOCUMENTMASTERKEY\$UNIQ0 ON EPMDocumentMasterKey(wtkey,idA3organizationReference,idA3namespaceReference) TABLESPACE INDX STORAGE (INITIAL 20k NEXT 20k PCTINCREASE 0)
- CREATE UNIQUE INDEX WTDOCUMENTMASTERKEY\$UNIQ0 ON
 WTDocumentMasterKey(wtkey,idA3organizationReference,idA3namespaceReference) TABLESPACE INDX STORAGE (INITIAL 20k NEXT 20k PCTINCREASE 0)
- CREATE UNIQUE INDEX WTPARTMASTERKEY\$UNIQ0 ON WTPartMasterKey(wtkey,idA3organizationReference,idA3namespaceReference)
 TABLESPACE INDX STORAGE (INITIAL 1m NEXT 1m PCTINCREASE 0)
- Changed to:
- CREATE UNIQUE INDEX EPMDocumentMaster\$UNIQUE ON
 EPMDocumentMaster(documentnumber,doctype,authoringapplication,idA3organizationReference) TABLESPACE INDX STORAGE (INITIAL 20k NEXT 20k
 PCTINCREASE 0);
- /
- CREATE UNIQUE INDEX EPMDocumentMasterFile\$UNIQUE ON EPMDocumentMaster(cadname,authoringapplication,idA3organizationReference)
 TABLESPACE INDX STORAGE (INITIAL 20k NEXT 20k PCTINCREASE 0);
- CREATE UNIQUE INDEX WTDocumentMasterKey\$UNIQUE ON WTDocumentMasterKey(wtkey,idA3organizationReference) TABLESPACE INDX STORAGE (INITIAL 20k NEXT 20k PCTINCREASE 0);
- CREATE UNIQUE INDEX WTPartMasterKey\$UNIQUE ON WTPartMasterKey(wtkey,idA3organizationReference) TABLESPACE INDX STORAGE (INITIAL 20k NEXT 20k PCTINCREASE 0);

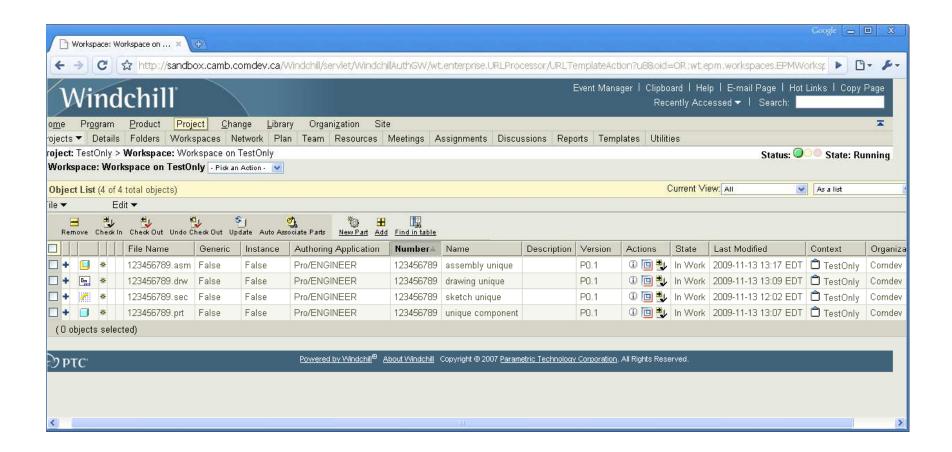


Result of this Solution

- WTPart
 - Only 1 unique WTPart can exist per organization
- WTDocument
 - Only 1 unique WTDocument can exist per organization
- EPMDocuments
 - Are uniquely managed according to number, type, authoring application and organization
 - EPM file names are also uniquely managed according to filenames, authoring application and organization (i.e. Pro/INTRALINK behavior)
- Thus:
 - Auto Association of CAD to Part will be based on synchronizing CAD and WTPart number only. If there is no respective Part number, there will not be an auto creation of Parts
 - Number generation is manual for WTDocuments and EPMDocuments if there
 is a requirement to synchronize WTPart number

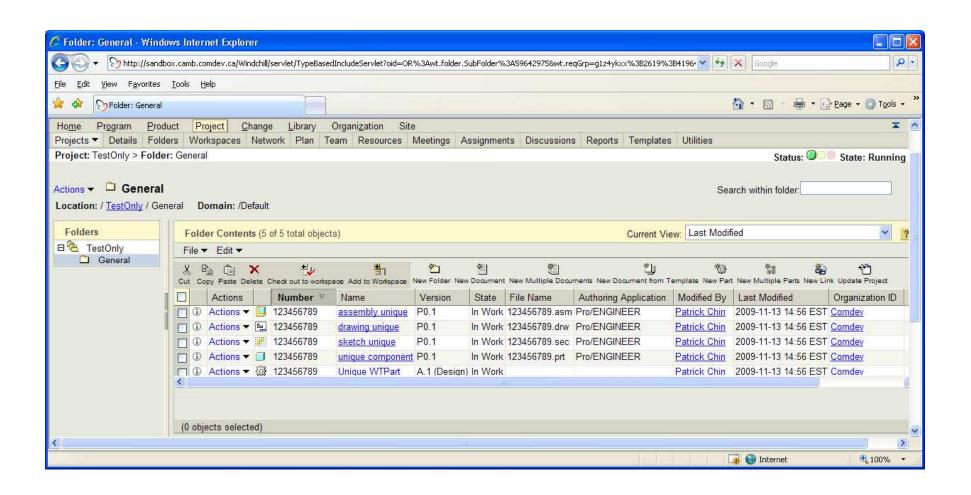


Result of this Solution – Workspace View



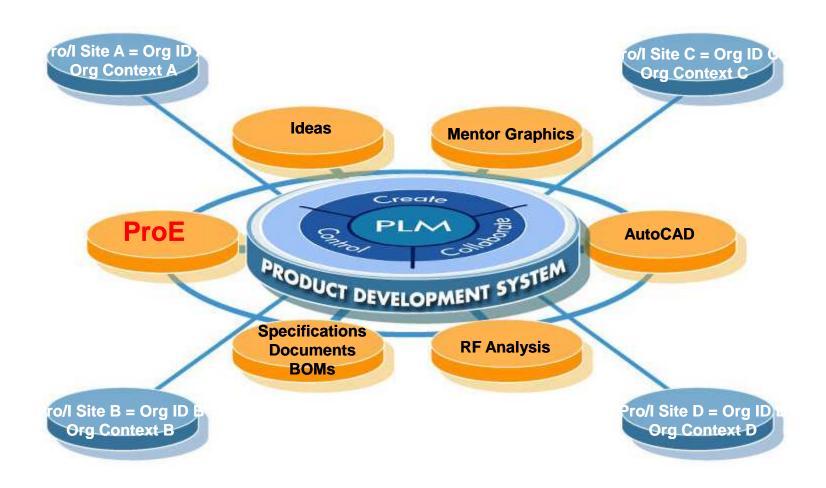


Result of this Solution – Context Folder View





Pro/INTRALINK Migrations



Appendix A – OOTB EPM Management in PLM

All Pro/E separate CAD types, such as assemblies, parts, drawings, sections, layouts, etc, are managed in one unique EPM CAD document object. Most common practice have the same number for various types. Due to PTC Pro/I practices and methodology, the uniqueness was the file name with extension. Pro/I was a file management tool.

Pro/E SECTION

Pro/E PART

Pro/E ASSEMBLY

Pro/E MANUFACTURING

Pro/E DRAWING

EPM DOCUMENT

Pro/E LAYOUT

Pro/E MARKUP

Pro/E DIAGRAM

Pro/E Other file types



Appendix A – OOTB EPM Management in PLM

Furthermore, Windchill allows multiple CAD and Arbortext but they all still are managed by a single EPM document type. Most companies use the same number if copied from one CAD tool to another for collaboration and sharing of IP. Thus, conflicts will occur if the CAD tools use the same number and file name with extension. As a result, OOTB does not following standard practices of both business and CAD tools.

Multiple Pro/E file types

Multiple ACAD types

Multiple CATIA types

Multiple CATIAV5 types

Multiple SOLIDWORKS types

Multiple UG types

Multiple Ideas types

Multiple ARBORTEXT content types

Multiple CADENCE CAD types

Multiple CCD CAD types

Multiple INVENTOR CAD types

Multiple ME10 CAD types

Multiple HELIX CAD types

Multiple TILLIA CAD types

Multiple ORCAD CAD types

Multiple MENTORB, D and E CAD types

Multiple CADDS5 types

Multiple CADSTAR types

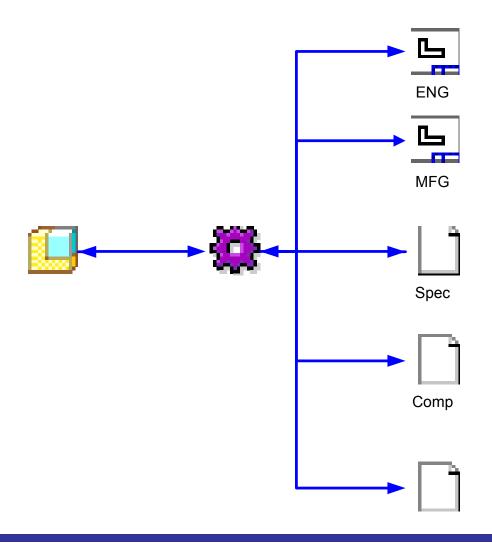
Multiple VISULA CAD types

Other CAD types

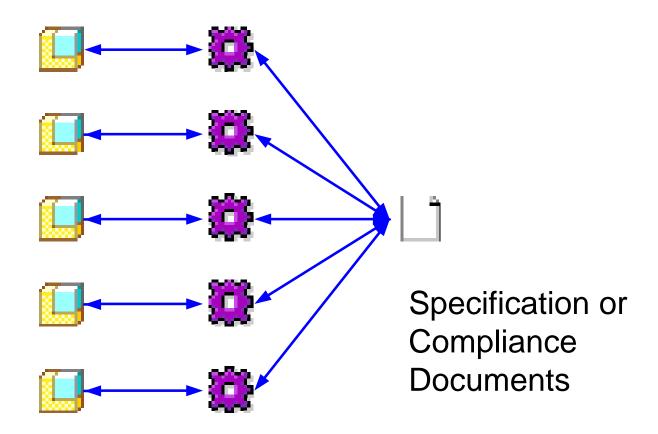
EPM DOCUMENT



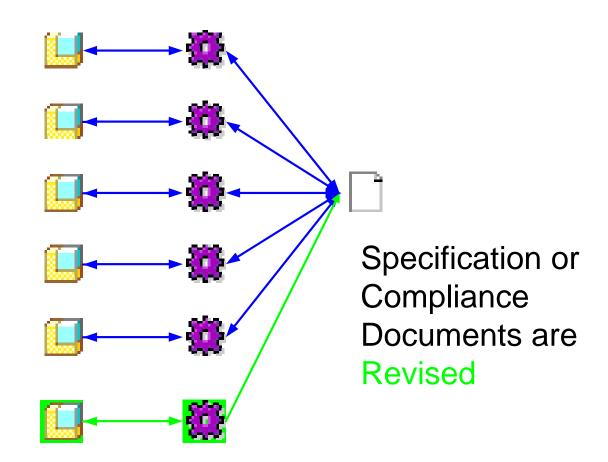
Relationship between Reference Documents and Components



Relationship between Reference Documents and Components

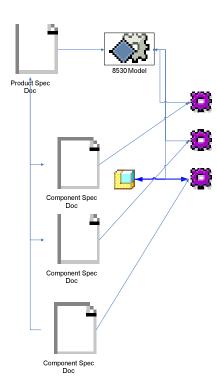


Relationship between Reference Documents and Components



New Component in Series

Product Spec and Component Spec



"As Process" CAD Methodology



CAD Model

Name: 1234568-001.asm

File Name: 1234568-001.asm

PDF



Drawing (Optional)

Number: 1234568-001

Version: A.1

Baan #: 1234568-001

Name: Housing

Attributes

Description

Nylon

Black

Smooth Textured

New Methodology Compliance

Fit or Form Change after Release



CAD Model

Number: 1234568

Name: Housing

File Name: 1234568.asm



Part Representation

Number: 1234568

Version: 1.1

Baan #: 1234568-001

Name: Housing

Attributes

Description

Teflon (temperatures)

Black

Smooth Textured



Drawing (Optional)

Number: 1234568-001

Version: A.1

Baan #: 1234568-001

Name: Housing

Attributes

Description

• Nylon

Black

Smooth Textured

PLM CAD Methodology

To be proposed to the Design Automation and executive teams of standardizing engineering and manufacturing for part, ProE CAD model and drawing methodology based on best industry practices.

Standardized Component Part, CAD Model and Drawing Nomenclature Methodology



Part Representation

Number: ######

Version: -.I (- no revision)

Name: 60 characters

Physical Attributes Only

- Material
- Finish
- Colour
- Dimensions



Component CAD Model

Number: ######

Version: A.I (A is Alfa)

Name: 60 characters

File Name: ######.prt

(number + ext)



Component CAD Drawing (Optional)

Number: ######

Version: A.I (A is Alfa)

Name: 60 characters

File Name: ######.drw

(number + ext)

- Material
- Finish
- Colour
- RoHS



Assembly Part Representation

Number: ######

Version: A.3 (Alpha

revision sequence for

assemblies)

Name: ASSY HOUSING

BOMs:



CAD Assembly Model

Number: ######

Version: A.1

Name: ASSY HOUSING

File Name: ######.asm



CAD Drawing

Number: ######

Version: A.1

Name: ASSY HOUSING

File Name: ######.drw

Example of a Standardized Component Part, CAD Model and Drawing

Initial Release



Part Representation

Number: 184786

Version: -.I (- no revision)

Name: COMPONENT

TITLE

Physical Attributes Only

- Material
- Finish
- Colour
- Dimensions



Component CAD Model

Number: 184786

Version: A.I (A is Alfa)

Name: COMPONENT

TITLE

File Name: 184786.prt

(number + ext)



Component CAD Drawing (Optional)

Number: 184786

Version: A.I (A is Alfa)

Name: COMPONENT TITLE

File Name: 184786.drw

(number + ext)

- Material
- Finish
- Colour
- RoHS

Example of a Standardized Component Part, CAD Model and Drawing

Drawing Text Change (No Fit, Form & Function Change) after Release



Part Representation

Number: 184786

Version: -.I (- no revision)

Name: COMPONENT

TITLE

Physical Attributes Only

- Material
- Finish
- Colour
- Dimensions



Component CAD Model

Number: 184786

Version: A.I (A is Alfa)

Name: COMPONENT

TITLE

File Name: 184786.prt

(number + ext)



Component CAD Drawing

Number: 184786

Version: B.I (A is Alfa)

Name: COMPONENT TITLE

File Name: 184786.drw

(number + ext)

- Material
- Finish
- Colour
- RoHS

Example of a Standardized Component Part, CAD Model and Drawing

Fit or Form Change after Release



Part Representation

Number: new number

Version: -.I (- no revision)

Name: COMPONENT

TITLE

Physical Attributes Only

- Material
- Finish
- Colour
- Dimensions



Component CAD Model

Number: new number

Version: A.I (A is Alfa)

Name: COMPONENT

TITLE

File Name: new number.prt

(number + ext)



Component CAD Drawing (Optional)

Number: new number

Version: A.I (A is Alfa)
Name: COMPONENT TITLE

File Name: new number.drw

(number + ext)

- Material
- Finish
- Colour
- RoHS

Initial Release



Assembly Part Representation

Number: 136814-101

Version: A.3 (Alpha

revision sequence for

assemblies)

Name: COMPONENT

TITLE

BOMs:



CAD Assembly Model

Number: 136814-101

Version: A.1

Name: COMPONENT

TITLE

File Name: 136814-

101.asm



CAD Drawing

Number: 136814-101

Version: A.1

Name: COMPONENT

TITLE

File Name: 136814-

101.drw

Drawing Text Change (No Fit, Form & Function Change) after Release



Assembly Part Representation

Number: 136814-101

Version: A.3 (Alpha

revision sequence for

assemblies)

Name: COMPONENT

TITLE

BOMs:



CAD Assembly Model

Number: 136814-101

Version: A.1

Name: COMPONENT

TITLE

File Name: 136814-

101.asm



CAD Drawing

Number: 136814-101

Version: B.1

Name: COMPONENT

TITLE

File Name: 136814-

101.drw

Component change resulting in a new assembly number



Assembly Part Representation

Number: new number

Version: A.3 (Alpha

revision sequence for

assemblies)

Name: COMPONENT

TITLE

BOMs:



CAD Assembly Model

Number: new number

Version: A.1

Name: COMPONENT

TITLE

File Name: new

number.asm



CAD Drawing

Number: new number

Version: A.1

Name: COMPONENT

TITLE

File Name: new

number.drw

Resulting change in next higher assembly revision



Assembly Part Representation

Number: #######

Version: B.3 (Alpha

revision sequence for

assemblies)

Name: COMPONENT

TITLE

BOMs:



CAD Assembly Model

Number: #######

Version: B.1

Name: COMPONENT

TITLE

File Name: #######.asm



CAD Drawing

Number: #######

Version: B.1

Name: COMPONENT

TITLE

File Name: #######.drw

Advantages of Standardized Methodology with PLM

- Visible standard changes in the organization with fit, form and function
- Alignment with current bin numbering in MFG
- PLM can provide better controls to enforce this methodology with workaround in different PLM libraries and subfolders