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PTC 324 - Task and Role-based PLM Apps

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Solution Management, PLM Segment, PTC

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Customer Challenges
Effectively Serving Broad Product Development Community

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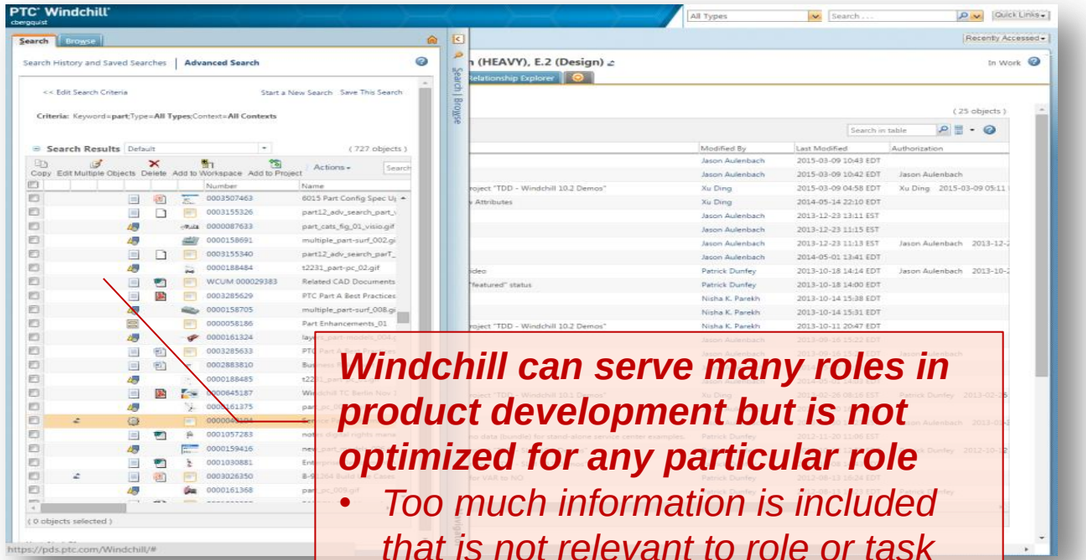
- ✓ ERP and PLM application interfaces are often too complex for use by a broad number of roles in product development
- ✓ They require too much training to learn to use
- ✓ Even with training, infrequent users quickly forget how to use the application
- ✓ A single application often does not include all the information needed to complete a task
- ✓ The applications can be tailored but it is usually costly to create and to maintain the customizations and customizations only work with specific versions of each application



Windchill can serve many roles in product development but is not optimized for any particular role

- *Too much information is included that is not relevant to role or task*
- *Too many actions are exposed that confuse user and potentially lead to errors*
- *Too much navigation is required to get to needed information for role or for task*

Product Development Use Cases
Common use cases for broad access to product information

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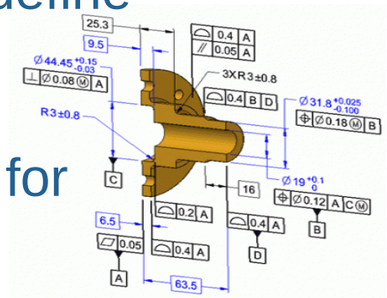
Typical tasks performed by roles in design, manufacturing, purchasing…

Consume

- ✓ Get drawing with dimensions to define tooling or process plan



- ✓ Get IGES file to send to supplier for quote

- ✓ See exploded view to understand what parts are used and what quantities for assembly planning
- ✓ Get basic properties (quantity in stock, in production, cost, supplier) for change impact
- ✓ See recent changes to part to address manufacturing issues

Contribute

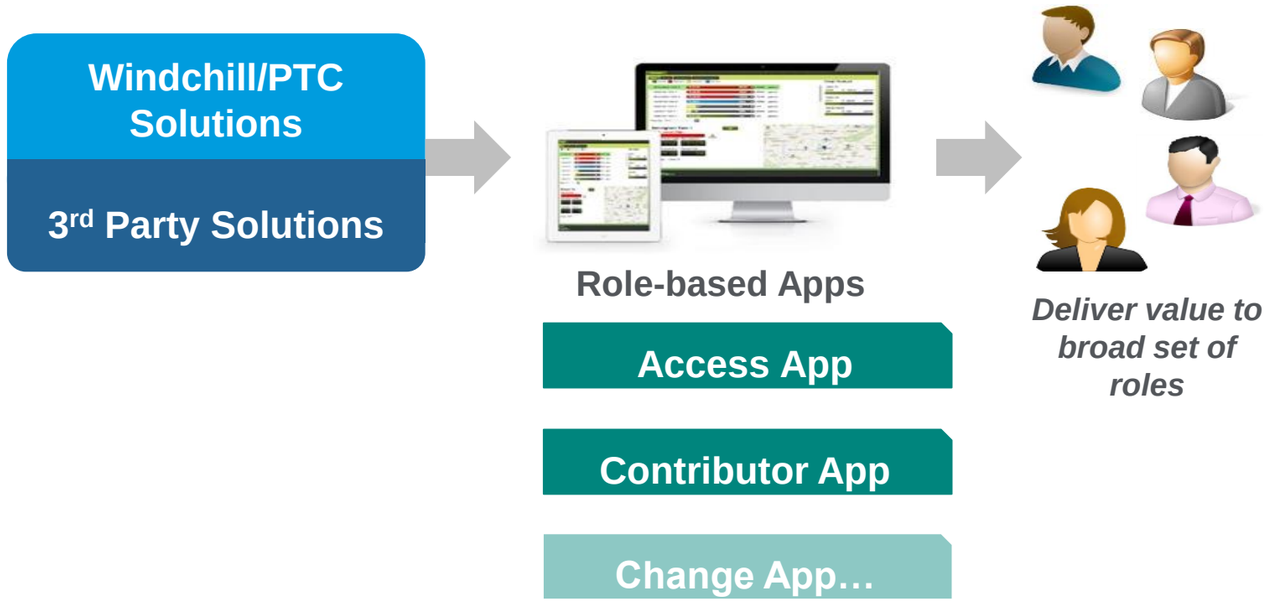
- ✓ Review and approve change order
- ✓ View aggregated list of tasks
- ✓ Attach specification or other document to item
- ✓ Edit requirements document

- ✓ Mark up model to recommend change
- ✓ Create problem report or non-conformance

Role-based Apps?

What if you could quickly build role-specific or task based apps that…

- ✓**Are simple to use requiring no training for quick adoption**
- ✓**Support mobile/touch and desktop device delivery**
- ✓**Require no system upgrades to use**
- ✓**Easily bring together information from Windchill and other PTC and 3rd party solutions**
- ✓**Are easily and quickly tailored/extended for changing role or task-based needs**



PTC Access App
Get/view drawing for part

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6289
6289267
6289427
6289529

View 3-D Section Exploded

Property Summary

6289427 Derailleur Assembly Version C.4 Released

Last modified: 12/20/2014
Last modified by: Jim Smith

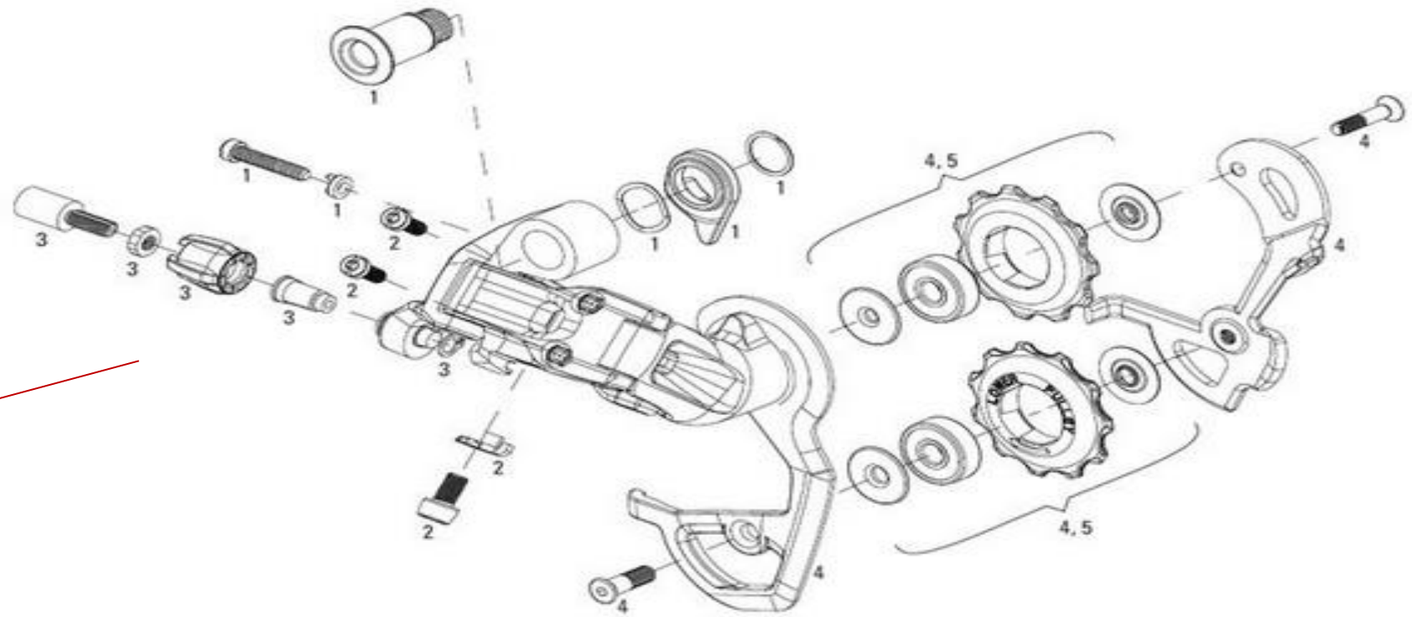
Cost: $52.36
Quantity In Stock: 507
Manufacturer: SRAM

Attributes aggregated from ERP, or SCM system

Formats

PDF IGES STEP STL

Selected format is displayed when selected or displayed automatically if it is the only format for the role



Forward looking information is subject to change

PTC Access App
Accessing parts list info for assembly

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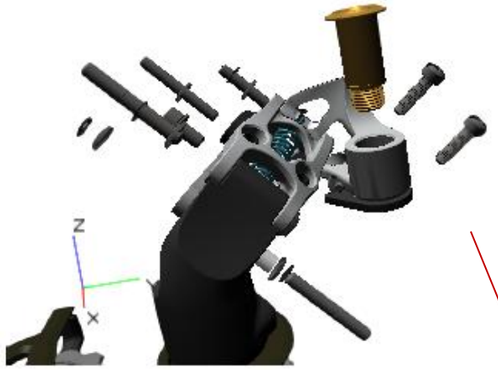
View 3-D Section Exploded



Formats

PDF IGES STEP

Property Summary

6289427 Derailleur Assembly Version C.4 Released

Last modified: 12/20/2014
Last modified by: Jim Smith

Cost: $52.36
Quantity In Stock: 507
Manufacturer: SRAM

When exploded view is selected, parts list for exploded assembly is automatically displayed

Parts List

Part Number	Description	Quantity	Unit	Lot Size	In Stock	Unit Cost	Vendor
5648291	B-Knuckle	1	ea	400	1,200	1.07	SRAM
5622654	Outerlink	1	ea	400	1,200	1.02	SRAM
5613205	Pivot Pin	4	ea	400	1,600	.28	Acme
5475310	P-Knuckle	2	ea	200	800	.79	SRAM
5920783	Main axle	1	ea	600	1,200	.22	Han
5951726	Fin	1	ea	200	1000	.23	SRAM
5639464	Seal	8	ea	1,000	10,000	.14	Han
5796453	O-ring	8	ea	1,000	8,000	.08	Han
5688517	External Retaining Ring	8	ea	1,000	6,000	.07	Han
5688517	Outer Cage	1	ea	400	650	.96	SRAM
5688517	Inner Cage	1	ea	400	625	.98	SRAM
5688517	Pulley	2	ea	400	1,350	.91	SRAM
5688517	Spring	1	ea	600	923	.62	Leroy

Exploded view and parts list are associated. Selected item in view is highlighted in parts list and vice-versa.

Parts list includes columns with information from ERP other systems that are important for role or task

PTC Access App Demonstrator Mobile Experience

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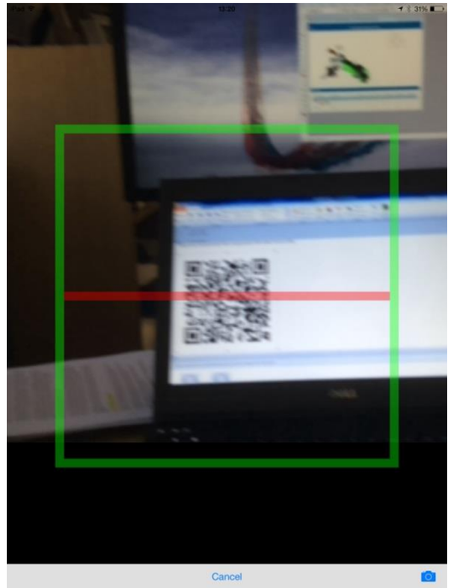
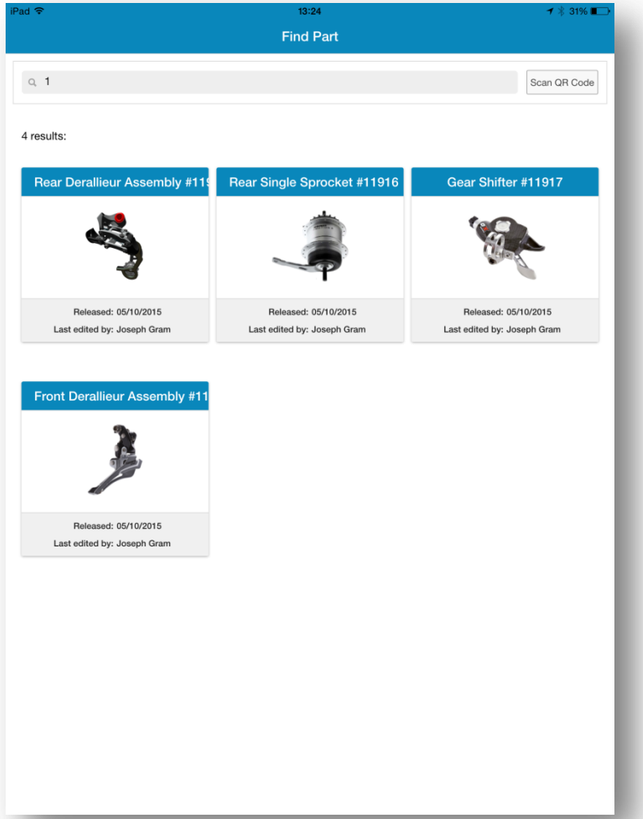
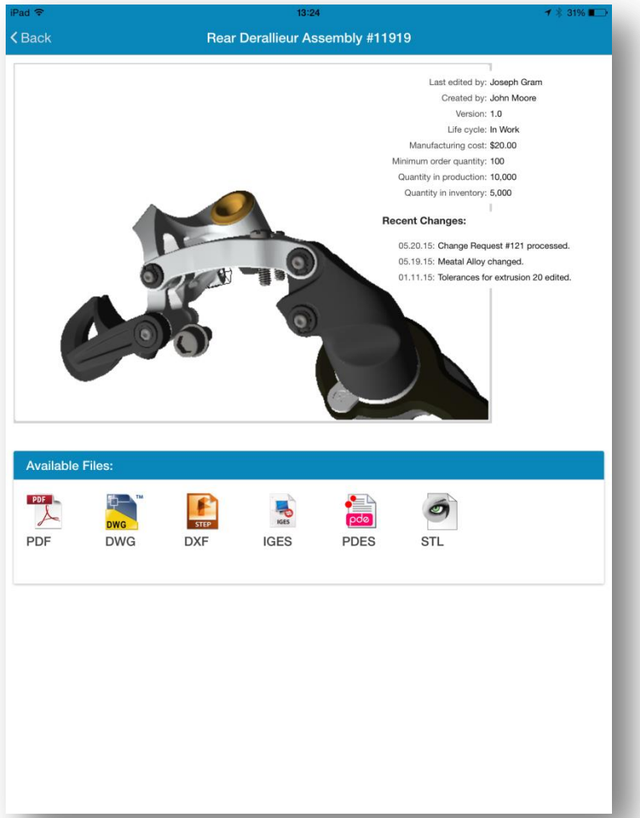


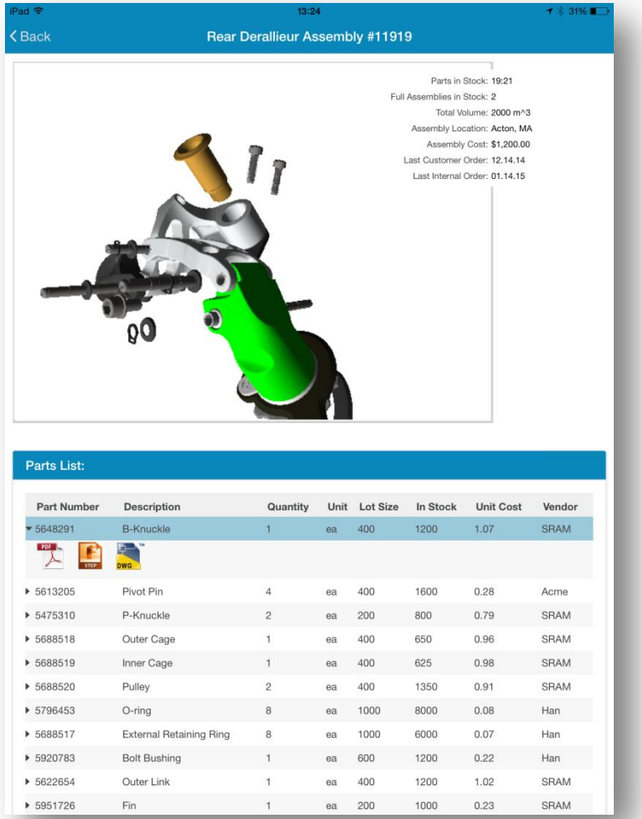
Scan QR code…



…or Search



Product properties, 3D and related documents



Exploded view, interactive parts list and related documents

Demonstration

PTC Contributor App
Consolidated task list and change review/markup

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Task Summary

Overdue	3
Due this week	10
Completed recently	2

Task – Review Change Markup Due: 3/20/2015 Customer: Turing GS #2850023

Too much force is required to insert subassembly. Reduce diameter as noted in markup.

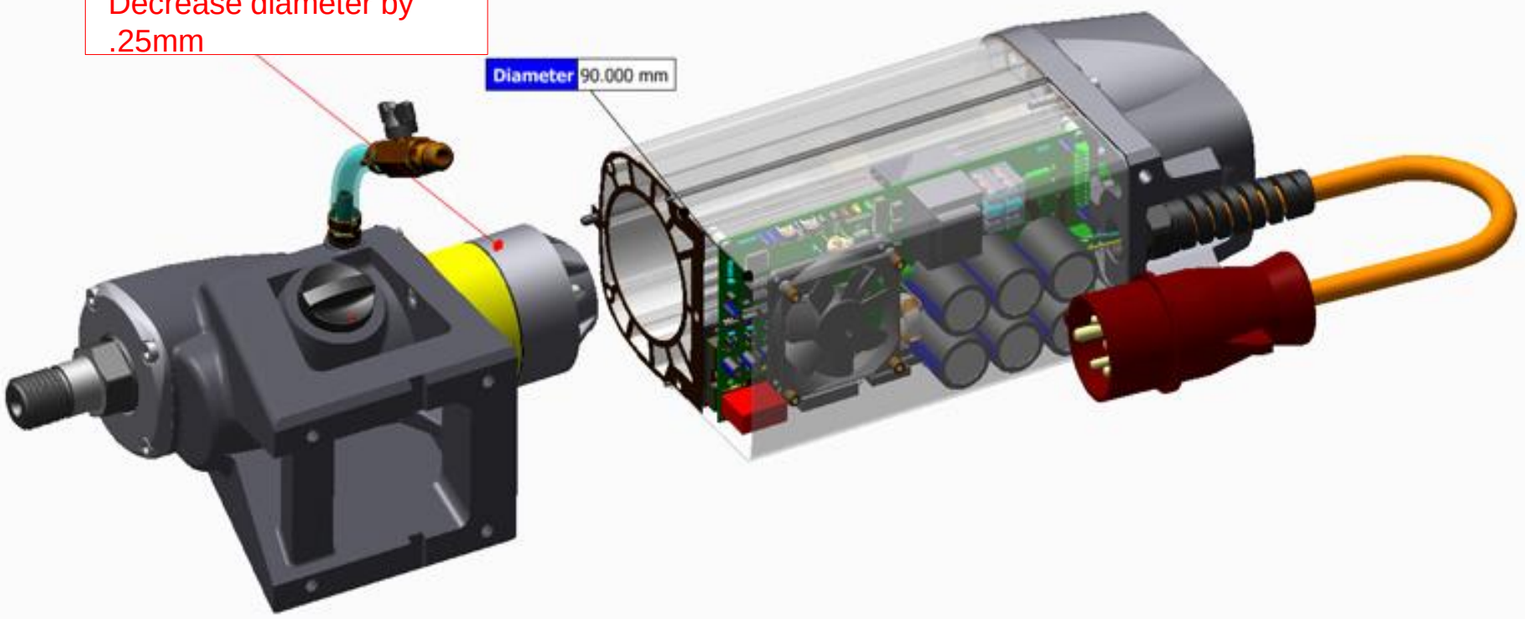
Accept Rework

Aggregate task list with tasks across product development systems

Recent

- Power System Requirements
- Power System Specification
- Load Analysis
- ECN – 201483 Cost Reduce
- Check Supplier Lead
- Linear motor calibration
- M264-2X Assembly Drawing

Decrease diameter by .25mm



Aggregate list of recently accessed or modified items

PTC Contributor App

Easily link documents/information to BOM items

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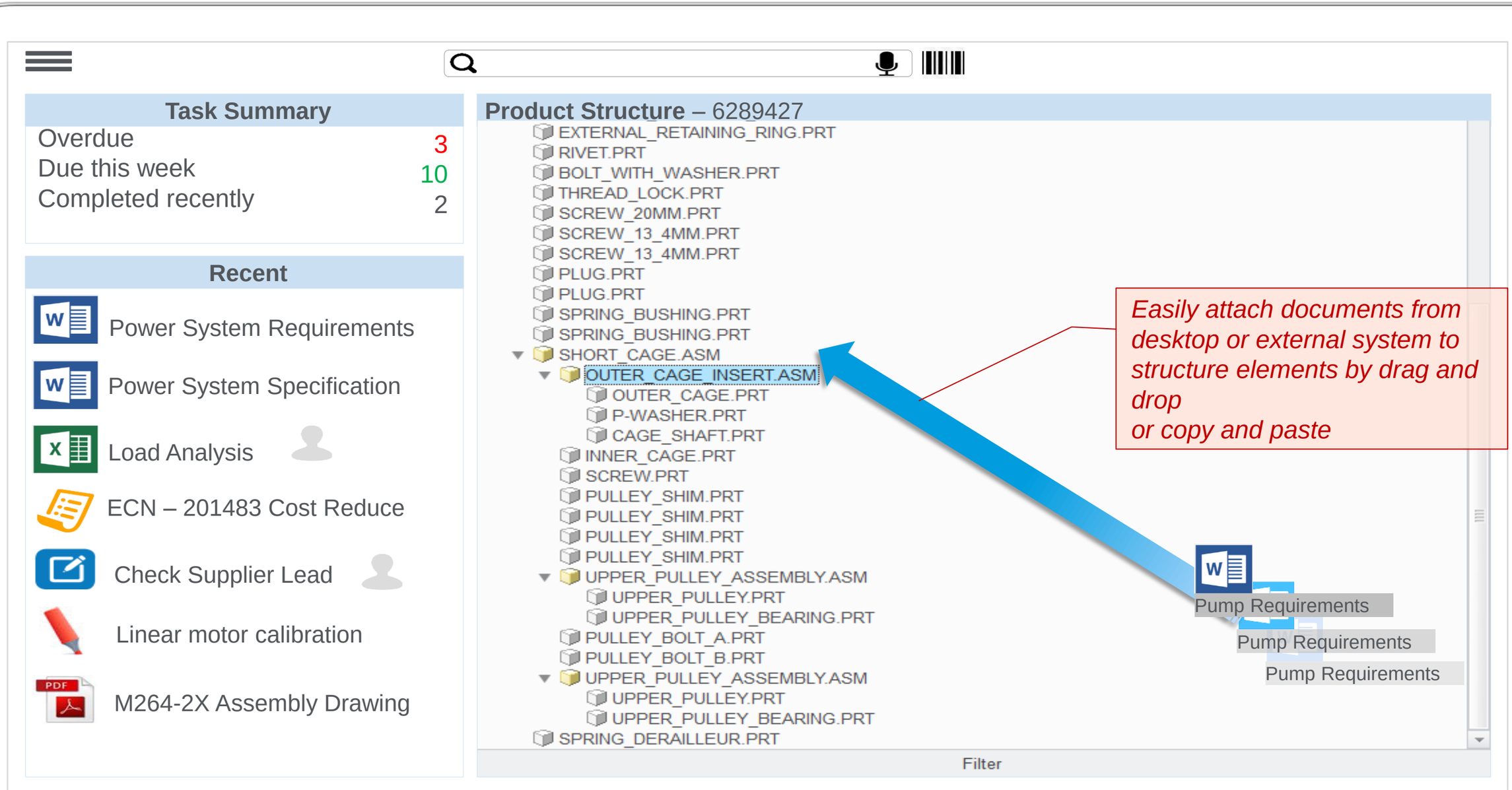

Expand value of BOM by associating information with the BOM elements with which it is most properly linked

Forward looking information is subject to change

Application Tailoring
Empower business owners to easily tailor apps

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App Tailor

Michael Rygol Log Out

Production Product Info App

Components

- Properties
- Formats
- Visualization
- Recent
- Related
- Search
- Subscribe
- Where-Used

Roles

- [ ] Assembly
- [x] Tooling
- [x] Process planning
- [x] Purchasing
- [ ] Project Manager
- [ ] Prototyping

1 *Identify Roles*

2 *Drag and drop components*

Formats

3 *Configure components*

Component Setup

Formats

- [x] PDF
- [ ] DXF
- [x] IGES
- [ ] PDES
- [ ] STEP
- [ ] STL

Generation

- [x] Pre-published
- [x] On-demand

Orientation

- ( ) Horizontal
- (•) Vertical

PTC Role-based Apps
Integration Architecture

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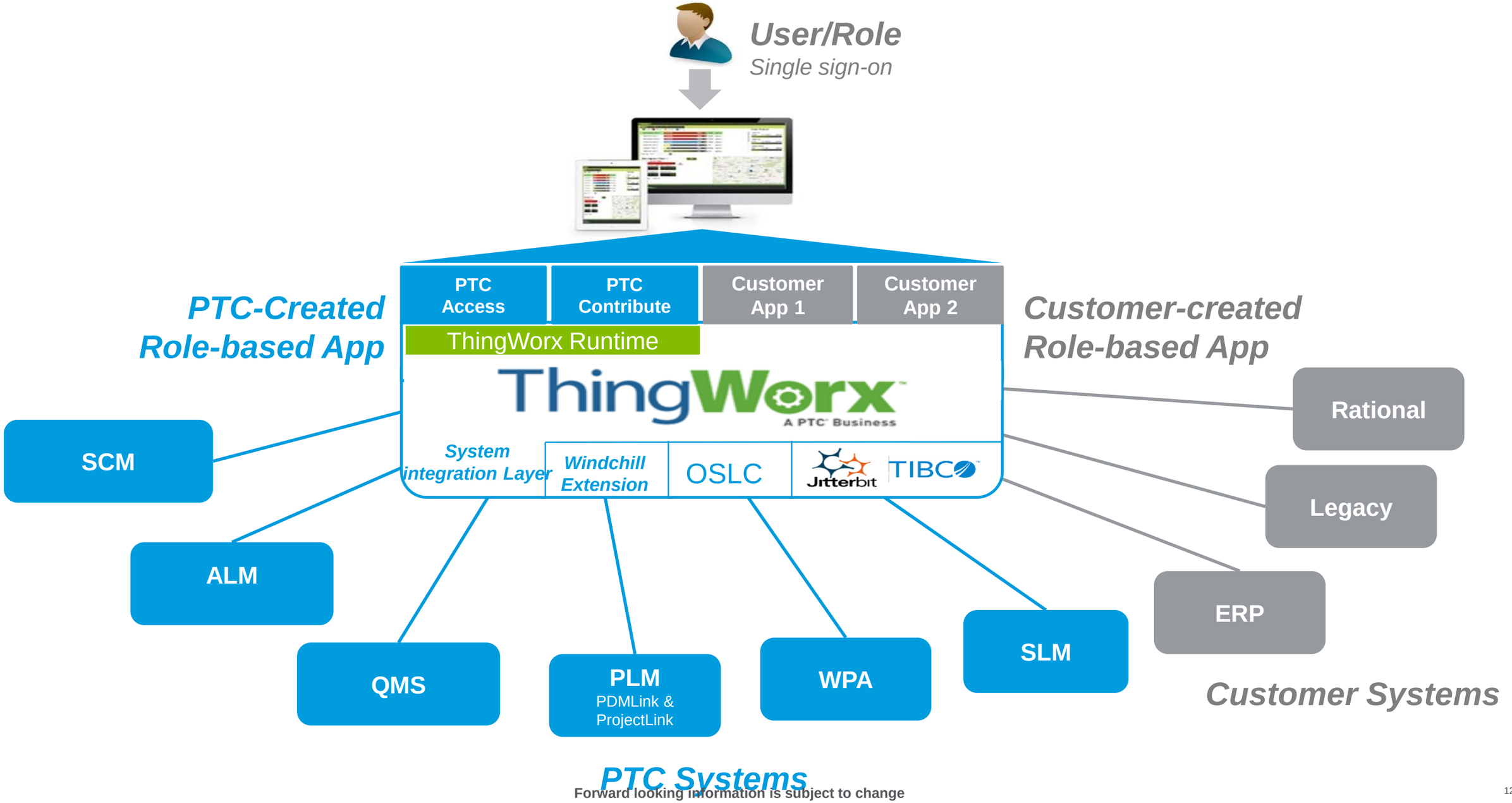

Conclusion

- Role and task-based apps aim to provide
  - A value-based pricing model for large communities of new Windchill users
  - A streamlined and targeted user experience with minimal training requirements
  - A platform-portable set of capabilities
  - Immediate integration with your current version on Windchill
  - An enterprise-wide window into your products
    - With expansion to present data from non-PTC systems

Helping you get more from your PLM investment

Forward looking information is subject to change

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PTC® PRODUCT & SERVICE ADVANTAGE®