

PTC® Live Global

CUST 310 - Security Label Information Needs To Be Obvious, And We Need A Safety Valve

Craig Raymond
Programmer Analyst Principal

June 10, 2015

Non-export controlled. Releasable to non-U.S. persons per INC-DSEA-2015-00031

One of the world's largest defense companies

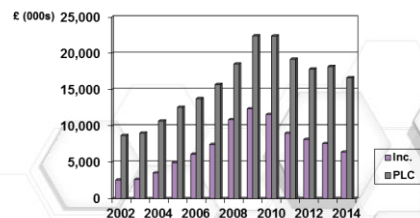
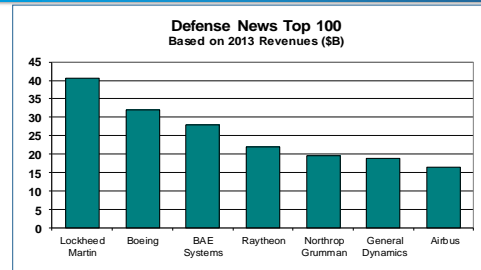
PTC® Live
Global

BAE Systems plc

- 83,400 employees
- 2014 sales of £16.6bn (\$27.4bn**)
- 2014 order book of £40.5bn (\$66.7bn**)
- Third largest global defense company
- Top 10 U.S. prime contractor
- Five key markets
- Presence in more than 100 nations

BAE Systems, Inc.

- Approximately 33,700 employees (approximately 30,000 in the U.S.)
- 2014 sales of approximately \$10.5bn
- Major operations in 30 states in the U.S., as well as the UK, Sweden, Israel
- A U.S. company chartered in Delaware



Led by Jerry DeMuro, President and CEO, BAE Systems, Inc. delivers a full range of products and services for air, land and naval forces, as well as advanced electronics, security, information technology solutions and support services.

BAE Systems, Inc. is a top-ten prime contractor to the U.S. Department of Defense and is well positioned to support customers in what is the world's largest single defense market.

Key Facts:

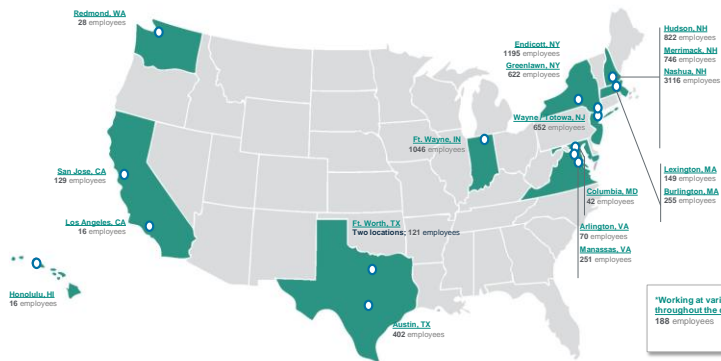
- Employs 33,700 (30,000 in the U.S.) with major operations in 30 states in the U.S., the UK, Sweden, and Israel
- Recorded 2014 sales of approximately \$10.5bn
- The U.S.-based business operates under a Special Security Agreement
- Holds more than 2,100 U.S. and foreign patents across technology domains
- Comprises three U.S.-headquartered sectors:
 - Electronic Systems
 - Intelligence & Security
 - Platforms & Services



Copyright 2015 BAE Systems



11,400 Employees
\$4B Revenue
25 Locations



Copyright 2015 BAE Systems



Copyright 2015 BAE Systems

About

Craig Raymond

- 1974 – AASET from Dutchess Community College (NY State – SUNY)
- 1991 – BSEE from Polytechnic University (now New York University - Polytechnic School of Engineering)
- WWW: working on web facing technologies since the mid 1990's
- Java: started Java programming in the late 1990's
- PTC Windchill: started with 8.0 to 9.1 upgrade in 2009
- Familiar with html, css, xml, Javascript, Java, etc.
- We are currently at 10.1 M040, some features are implemented in later PTC Windchill releases



Copyright 2015 BAE Systems

What is the minimum “required”?

- **Export Security Label:**

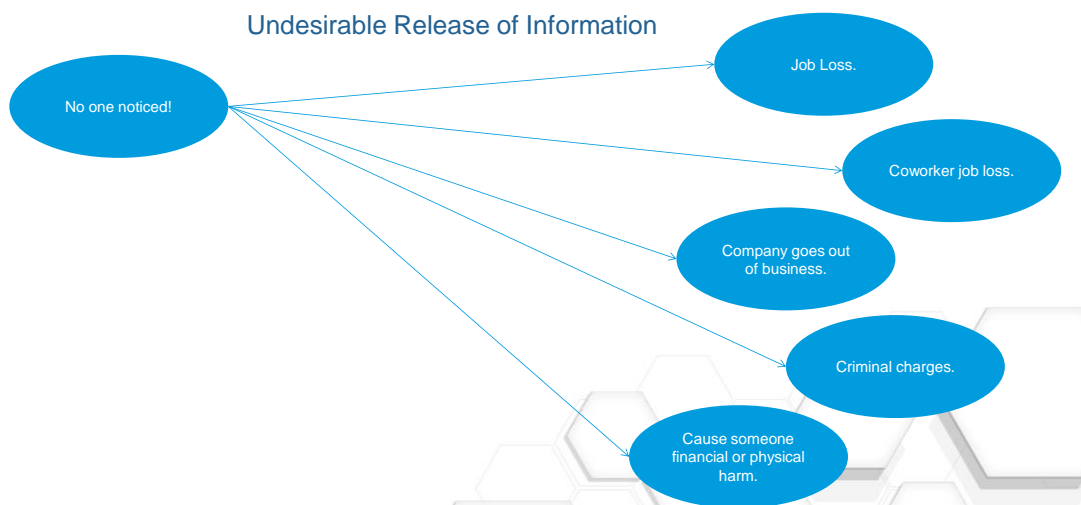
- Non Technical (Accessible by everyone with appropriate PTC Windchill access)
- EAR (Export Administration Regulations) (Accessible by US employees and agreement members)
- ITAR (International Traffic in Arms Regulations) (Accessible by US employees and agreement members)

- **Proprietary Security Label:**

- Non Proprietary (Accessible by everyone with appropriate PTC Windchill access)
- BAE Systems Proprietary (Accessible by US employees and agreement members)
- Third Party Proprietary (Accessible by US employees and agreement members)

Copyright 2015 BAE Systems

What could go wrong?



Copyright 2015 BAE Systems

Safety Valves

- **Five Safety Valves**
 - Not Reviewed security label values
 - Workflow managed security label
 - Security labels details section
 - Security labels displayed in views
 - Workflow checking of legal / business rule compliance



First Safety Valve

- **Not Reviewed**
 - Not Reviewed value for both of the previous labels.
 - Does not have an associated agreement (Accessible by US employees only)
 - Default value for object creation, set by Site OIR (Object Initialization Rule)



Second Safety Valve

- **Workflow Security Label**

- Managed by the workflow, not the user
- Values: Unlocked, Locked
- No associated agreement (Accessible by US employees only)
- Not visible to users during object creation (hidden by OIR)
- Only visible to Administrators via Manage Security (A safety valve on the safety valve)
- Designed to handle multiple objects
- Allows continuous object labeling / relabeling before final "release"



Third Safety Valve

- **Security Labels section on Details tab**

- Uses a Data Utility (Java class to create GUI components – Customization Guide)
- Links to current agreements, if any (10.2 M030)
- Links to create an agreement, if necessary (Agreements Administrators)
- Display relevant warnings about the implications of the current values



Visualization and Attributes | More Attributes



Visualization and Attributes

Name: Test Part 1
Status: Checked in
Modified By: Site, Administrator
Last Modified: 2013-12-24 08:41 EST

Security Labels

Export Security Label: ITAR (By Context)
Proprietary Security Label: BAE Systems Proprietary (By Context)
Acknowledgement: Craig Test Product: [Agreements Folder](#)

ITAR (By Context) CITAR Information Text Will Go Here...
 Active agreement(s): [ITAR Test Agreement, -1](#)

BAE Systems Proprietary (By Context) CBAE Information Text Will Go Here...



Fourth Safety Valve

- **Security Labels columns in views**

- availableAttributesSite.xml (Customization Guide - 10.2 M020)
- extend PSBUsesTableView/PSBTreeTableView override getSpecialTableColumnAttrDefinition() (unsupported)

Folder Contents All (20 objects)

Number	Name	Version	State	Last Modified	Export Security Label	Proprietary Security Label
0000000048	Subst Part 1	A.3	Released	2015-02-26 10:30 EST	Non-Tech	Non Proprietary
BAEREFDOC1	BAERefDoc1	-.1	Open	2014-11-24 08:59 EST	Non-Tech	Non Proprietary
0000000061	Assy BAE Part 2	A.5	Released	2014-11-12 13:12 EST	Non-Tech	Non Proprietary
TEST W/ORIG...	Test w/orig S...	-.1	Open	2014-03-24 14:23 EDT	Non-Tech	Non Proprietary
0000000046	Test Part 1	A.10	Released	2013-12-24 08:41 EST	ITAR (By Context)	BAE Systems Proprietary

Number	Name	Version	End Item	Lin...	Q...	Unit	Tr...	Ref...	Fin...	Pu...	Export Security L...	Proprietary Security Label
0000000046	Test Part 1	A.10	No	1		CAN	U...				ITAR (By Context)	BAE Systems Proprietary (...)
0000000047	Test Part 2	A.1	No	1		each	U...				Non-Tech	Non Proprietary

Copyright 2015 BAE Systems

Fifth Safety Valve

- **Workflow Checking**

- Not Reviewed is not a valid Released/Completed value
- EAR part can not have an ITAR describe by document
- Non Technical part can not have an EAR or ITAR describe by document
- Additional rules as business or legal requirements dictate

Copyright 2015 BAE Systems

Agreements Management

- Report/Utility

- Display; export, modify, and import xlsx files (modify and create agreements)
- Makes agreement management easier

Agreements Management:

Agreement Name:

Display (By Context) Agreements:

Display (By Object) Agreements:

Display Non-Active Agreements: expired, inactive, superseded

Display Contract Agreements: only or none

Agreements Management (6 objects)

Actions -

Agreement	Number	Agreement Type	Context Name	Context Type	State	Status	V...	Start Date	End Date	Authorized Participants	Authorization Doc
ear context based	0000000182	EAR Agreement (By Context)	Craig Test Pro...	Product	Approved	Active	-2	2014-09-01 05:00 GMT	2015-09-14 05:00 GMT		
thr non context	0000000185	Third Party Proprietary Agree...	Craig Test Pro...	Product	Approved	Expired	-3	2014-09-02 05:00 GMT	2014-11-19 06:00 GMT	Agreements Administrators , ...	
ITAR Test Agreement	0000000281	ITAR Agreement (By Context)	Craig Test Pro...	Product	Approved	Active	-1	2015-04-01 05:00 GMT	2017-04-30 05:00 GMT		
ttt1	0000000181	BAE Proprietary Agreement (By ...	Craig Test Pro...	Product	Approved	Expired	-1	2014-09-01 05:00 GMT	2014-09-30 05:00 GMT		
tpp non context based	0000000186	Third Party Proprietary Agree...	Craig Test Pro...	Product	Approved	Expired	-1	2014-09-01 05:00 GMT	2014-12-09 06:00 GMT		
ear not context based	0000000201	EAR Agreement (By Object)	Craig Test Pro...	Product	Approved	Expired	-1	2014-09-09 05:00 GMT	2014-10-29 05:00 GMT		

Copyright 2015 BAE Systems

Lessons Learned

Take the time to:

- Understand security labels and agreements behavior
- Understand your legal and business rules
- Understand your global access (employees, customers, vendors – local, remote)
- Plan your security labels architecture
- Plan how to properly label existing data (automatic, manual, both – 10.2 M020 batch utility)
- Implement processes / training to ensure compliance
- Test, test, test

- Your feedback is valuable
- Don't miss out on the chance to provide your feedback
- Gain a chance to win an instant prize!
- Complete your session evaluation now

PTC® Live Global