1 Preface

If you would like to learn in detail regarding the top tabs, menu bar, links and other standard functionality, it is strongly advised to register for the PTC online web-based training. The PTC online training will not tell you how to do your job in the tool, but will give you a general knowledge and orientation of PLM. Contact your functional power user, manager and PLM administrators for registering to PTC online training. The web-based training is from 1 to 2 weeks long depending on the users. PTC online web-based training will not have the Psion Teklogix Inc’s customizations which are integrated very well into the system. This guide is just a basic overview of functionality to get a user started and will not show functionality in detail.

Below is a list of PLM Power Users or Subject Matter Experts (SMEs) who can assist you if you have any questions:

- Marinela Drehuta
- David Lawson
- Jenna Maxwell
- Mary Iafrate
- Cristina Sanchez
- Lorraine Dennis
- Vlada Savguira
- Brian Jay
- Mark Garlock
- Glen Moffat
- Joe Dempster
- Alex Watt
- Daniel Goodland
- Michael Tran
- Albert Lo
- Andre Gagne
- Wai Gock Chan
- Rajmy Sayavong
- Shohail Ahmed
- Patrick Chin
- Tricia Ward
- Jin Liu
- Vesna Klarić
- Kim Yeo
- Donna Corcoran
- Danny Generali
- Cheri Forbes
- Margaret Silva-Lauff
- Christina Tsui
- David Klynkramer
- Alan Mangaroo
- Alexander Krutzke
- Dave Ma
- Josephine Lai
- Sada Dharwarkar
- Yana Kozhevnkova
- Shahe Altounian
- Sava Stoianov
- Paul Bonsell
- Steve Ponikvar
- Scott Dawson
- Angus Parekunnel
- Gord Purcell
- Sharon Grant
- Hetty Zhang
2 Basic Overview

The following will show basic functionality of searching and viewing parts and documents. PLM will be the single source of all product documentation moving forward for new products. In PLM, author or creator of the product information is instantly creating, updating and submitting the source information for review. There is no manual process creating multiple copies of the information from hard drives to network drives and then to sharepoint. There is complete major and minor change history with revision and iteration history respectively. PLM will be used as a collaborative tool for product development and improvement cycles. PLM will contain the following documentation:

- Part packages links to all documentation
- 3D Mechanical CAD
- 2D Electrical CAD
- Drawings
- Reports
- BOMs
- Family Tree
- Contracts
- Plans
- SDoCs
- AVL/AML
- Cost
- Technical Publication Manuals
- WorkInstructions
- Waivers
- Engineering Specifications
- Marketing Requirements
- WBS
- SOP
- SCD
- Vendor Quotations

Based on access, access to various parts and documents will depend on at their:

- Object/document types
- lifecycle states
- folders
- roles
- groups
- organizations,
- library containers
- product containers
- project containers
In most cases for new product releases, released manuals are not efficient. There is other information in the PLM library to give you a better grasp of the product. Users can create problem reports, change request and mark-ups to the actual information live on the system and will provide immediate feedback to the engineering, manufacturing and purchasing functional groups regarding their issues which are linked directly to the parts or documents in question. No need to look at trails of emails or word of mouth. It provides instant traceability and reports based on your requirements. If you do have access to the objects, you can actually trace the current responsible roles activity through a workflow. Thus it is extremely important to check your at least 3 times a day. Managers will be able to track and report all the activities.

PLM is now being used to efficiently develop, collaborate and demonstrate the new products in 3D using ProductView. You can capture animation movies with disassembling, cross sections, or measurements. ProductView can be used in advance before even a physical prototype is made for work instructions and assembly manuals.
PLM can also provide a constant standard release process for parts and documents according to the standard fit, form, function rules so that everyone including ODMs have to follow. Thus, the entire enterprise will in sync.

PLM will not do the following:

- ERP or cost analysis, purchase orders, etc.
- MRP or material analysis
- Do the work for you
## 2.1 Object Types

There are many more types of objects in PLM. These items can reside in products and libraries, which are accessible from the **Product** and **Library** tabs available at the top of your Windchill PDMLink screen.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td>Document</td>
<td>A document is a content holder for a Microsoft Word, Excel, PowerPoint, or other type of file. A document can stand alone or can be associated with a part, end item, or other documents.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>CAD Document</td>
<td>A CAD document is a revision controlled, lifecycle managed item containing a CAD model, which is a file or a set of files containing information in a CAD application format. A CAD document is a content holder for CAD-derived files that can be related to parts in order to further describe the associated part. It can also be related to other CAD documents, so that dependencies created and maintained by the authoring CAD system are represented.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Part</td>
<td>A part is a physical component or assembly used in a product structure.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>End Item</td>
<td>An end item is a special kind of part in the product structure. It represents a unit of product functionality that is sold, assembled, and delivered to a customer.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Managed Baseline</td>
<td>A managed baseline is essentially a snapshot of a collection of product data at a specific point in time. Once a baseline is created parts and documents can be added to the baseline. A baseline can contain any number of parts and documents, and a part or document can be in any number of baselines.</td>
</tr>
<tr>
<td>Icon</td>
<td>Item</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>-----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>Problem Report</td>
<td>A problem report is created to document a problem or request a product enhancement. A problem report can be created by a registered user of Windchill PDMLink or on behalf of someone outside the system, such as a customer or supplier.</td>
</tr>
<tr>
<td></td>
<td>Change Request</td>
<td>An change request can be created to investigate solutions to one or more problem reports or without any reference to a problem report. It details and quantifies the impact of the proposed changes necessary to correct a problem or provide the enhancement so that the appropriate people can make the business decision to proceed with or cancel the proposed change. The result of an approved change request is the creation of one or more change notice.</td>
</tr>
<tr>
<td></td>
<td>Change Notice</td>
<td>An change notice can be created in reference to one or more change notice. It details the tasks that need to be completed in order for the change to be implemented and enables the tasks to be assigned to individuals.</td>
</tr>
</tbody>
</table>
2.2 Object Uniqueness

Windchill PDMLink can manage data from multiple organizations. As a result, the objects are uniquely identified by multiple metadata attributes:

<table>
<thead>
<tr>
<th>Organization ID, Number, Object Master Type</th>
<th>Organization ID, Number, authoring tool, type and organization</th>
<th>CAD file name + extension, authoring tool and organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Part (Object Master)</td>
<td>• ProE Section</td>
<td>CAD</td>
</tr>
<tr>
<td>o End Item</td>
<td>• ProE Part</td>
<td></td>
</tr>
<tr>
<td>• Document</td>
<td>• ProE Manufacturing</td>
<td></td>
</tr>
<tr>
<td>• Baseline</td>
<td>• ProE Assembly</td>
<td></td>
</tr>
<tr>
<td>• Problem Report</td>
<td>• ProE Drawing</td>
<td></td>
</tr>
<tr>
<td>• Change Request</td>
<td>• Mentor G</td>
<td></td>
</tr>
<tr>
<td>• Change Notice</td>
<td>• 123456789.lay</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 123456789.mrk</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 123456789.dia</td>
<td></td>
</tr>
</tbody>
</table>

2.3 Part and Document Methodology

In PLM, there are now separate objects for parts, BOMs and other documents. Each objects are just containers/baskets of information and files. Since part object represent the actual physical part, the PLM part (WTPart) contains only the physical attributes to describe the part. Thus, a fit, form, function will require a new part number which in turn is a new part. WTPart objects in PLM do not contain any files. Thus, documents objects are related/associated to WTPart objects describe the WTPart. For most 3D CAD association to the WTPart, majority of 3D CAD files represent the fit and form. A revision in an associated document will represent a non-fit, non-form and non-function change. PLM can create associate links from object to object which can be used for quick access to reference documents. Information can be separated according to its functional constituent.
There can be no duplication of objects. Each object is uniquely identified by their respective object number:
**CAD Model**
- Number: ####### (7 digits)
- Version: A.I (A is Alfa)
- Name: 60 characters (BAAN Desc1 + Desc2)
- File Name: ####### (7 digits + ext)

**Part Representation**
- Number: ####### (7 digits)
- Version: X.I (X is numeric)
- Name: 60 characters (BAAN Desc1 + Desc2)
- Attributes
  - Material
  - Finish
  - Colour

**CAD Drawing**
- Number: #######
- Version: A.I (A is Alfa)
- Name: 60 characters (BAAN Desc1 + Desc2)
- File Name: #######.drw (7 digits + ext)
- Attributes
  - Material
  - Finish
  - Colour
  - RoHS
Log Into PLM

Prior to logging in, it is imperative that you have completed the entire client setup guide. Open a Windows Internet Explorer window and place the following in the url address field.

http://plm.ad.psion.com/Windchill

The address is case sensitive. Thus, the letter W is capitalized. After entering this and selecting the enter key, the system should prompt the user to log in:

The user name is your PAD userid, not pad\userid. The password is your PAD system password identical to one logging into your desktop/laptop. It is not advisable to select remember your password because if you do not have security on your desktop/laptop screen savers, anyone is able to enter the url address and proceed into PLM as you with all your permissions. After you have logged into PLM, you can save the address as a favourite in your internet browser.
3 Basic User Functionality
The following will show some basic user functionality:

- User tabs, menu bars and links
- Search
  - Search Index Engine
  - Basic Search
  - Advance Search
  - Classification Search (not available)
- Viewing content files using ProductView
- Overview Part/WTPart information details page
- Overview of Document information details page
3.1 Top Tabs, Menu Bar and other Links of PLM

After a user logs into PLM, tabs and their respective menu bar will appear at the top of the browser page. Based on access, various users will have different results of top tabs, products and libraries. Each tab has different set of menu bars as seen below:
Below is a list of Libraries according to their functional areas which have their own release processes:

<table>
<thead>
<tr>
<th>Library Name</th>
<th>Description</th>
<th>Actions</th>
<th>Creator</th>
<th>Last Updated</th>
<th>Created On</th>
<th>Owner</th>
<th>Organization Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Artwork Library</td>
<td>Artwork Library</td>
<td><img src="artwork.png" alt="See Actions" /></td>
<td>ecwadmin</td>
<td>02/22/2007</td>
<td>02/22/2007</td>
<td>ecwadmin</td>
<td>PTX Product Management</td>
</tr>
<tr>
<td>Confidential Library</td>
<td>Confidential Documents, Specifications, Drawings, Contracts</td>
<td><img src="confidential.png" alt="See Actions" /></td>
<td>pchin</td>
<td>06/28/2007</td>
<td>06/28/2007</td>
<td>pchin</td>
<td>PTX Product Management</td>
</tr>
<tr>
<td>Electrical Design Library</td>
<td>Electrical Design Library</td>
<td><img src="electrical.png" alt="See Actions" /></td>
<td>Administrator</td>
<td>07/10/2006</td>
<td>07/10/2006</td>
<td>Administrator</td>
<td>PTX Product Management</td>
</tr>
<tr>
<td>Information Systems</td>
<td>Information Systems</td>
<td><img src="information.png" alt="See Actions" /></td>
<td>ecwadmin</td>
<td>10/17/2006</td>
<td>10/17/2006</td>
<td>ecwadmin</td>
<td>PTX Product Management</td>
</tr>
<tr>
<td>Manufacturers and Suppliers Library</td>
<td>Approved Manufacturer and Supplier Parts and SDCCs</td>
<td><img src="manufacturer.png" alt="See Actions" /></td>
<td>wgcch</td>
<td>06/19/2007</td>
<td>06/19/2007</td>
<td>wgcch</td>
<td>PTX Product Management</td>
</tr>
<tr>
<td>Manufacturing Library</td>
<td>Manufacturing Operations Library Data</td>
<td><img src="manufacturing.png" alt="See Actions" /></td>
<td>ecwadmin</td>
<td>01/11/2007</td>
<td>01/11/2007</td>
<td>ecwadmin</td>
<td>PTX Product Management</td>
</tr>
<tr>
<td>Marketing Library</td>
<td>Marketing Library</td>
<td><img src="marketing.png" alt="See Actions" /></td>
<td>pchin</td>
<td>09/17/2007</td>
<td>09/17/2007</td>
<td>pchin</td>
<td>PTX Product Management</td>
</tr>
<tr>
<td>Mechanical Design Library</td>
<td>Mechanical Design Library</td>
<td><img src="mechanical.png" alt="See Actions" /></td>
<td>Administrator</td>
<td>07/10/2006</td>
<td>07/10/2006</td>
<td>Administrator</td>
<td>PTX Product Management</td>
</tr>
<tr>
<td>Product Validation</td>
<td>Product Test and Validation</td>
<td><img src="validation.png" alt="See Actions" /></td>
<td>ecwadmin</td>
<td>01/19/2007</td>
<td>01/19/2007</td>
<td>ecwadmin</td>
<td>PTX Product Management</td>
</tr>
<tr>
<td>Purchase Component Library</td>
<td>Purchase Component Library</td>
<td><img src="purchase.png" alt="See Actions" /></td>
<td>ecwadmin</td>
<td>07/10/2006</td>
<td>07/10/2006</td>
<td>ecwadmin</td>
<td>PTX Product Management</td>
</tr>
<tr>
<td>Regulatory Library</td>
<td>Regulatory Country Labels and other product released content</td>
<td><img src="regulatory.png" alt="See Actions" /></td>
<td>ecwadmin</td>
<td>01/24/2007</td>
<td>01/24/2007</td>
<td>ecwadmin</td>
<td>PTX Product Management</td>
</tr>
<tr>
<td>Services and Support</td>
<td>Services and Support</td>
<td><img src="services.png" alt="See Actions" /></td>
<td>ecwadmin</td>
<td>08/22/2007</td>
<td>08/22/2007</td>
<td>ecwadmin</td>
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</tr>
<tr>
<td>Software Library</td>
<td>Software Library</td>
<td><img src="software.png" alt="See Actions" /></td>
<td>ecwadmin</td>
<td>05/11/2007</td>
<td>05/11/2007</td>
<td>ecwadmin</td>
<td>PTX Product Management</td>
</tr>
</tbody>
</table>
### PTX Product Management

**Supplier List (177 items)**

#### Current View: All

<table>
<thead>
<tr>
<th>Name</th>
<th>State</th>
<th>Type</th>
<th>Created On</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>INTERSIL</td>
<td>In Work</td>
<td>Manufacturer</td>
<td>07/18/2007</td>
<td>07/18/2007</td>
</tr>
<tr>
<td>IFC</td>
<td>In Work</td>
<td>Manufacturer</td>
<td>07/18/2007</td>
<td>07/18/2007</td>
</tr>
<tr>
<td>IFF</td>
<td>In Work</td>
<td>Manufacturer</td>
<td>07/18/2007</td>
<td>07/18/2007</td>
</tr>
<tr>
<td>ITT Cannon</td>
<td>In Work</td>
<td>Manufacturer</td>
<td>07/18/2007</td>
<td>07/18/2007</td>
</tr>
<tr>
<td>JAE</td>
<td>In Work</td>
<td>Manufacturer</td>
<td>07/18/2007</td>
<td>07/18/2007</td>
</tr>
<tr>
<td>JOHNSON</td>
<td>In Work</td>
<td>Manufacturer</td>
<td>07/18/2007</td>
<td>07/18/2007</td>
</tr>
<tr>
<td>JOHNSON</td>
<td>In Work</td>
<td>Manufacturer</td>
<td>07/18/2007</td>
<td>07/18/2007</td>
</tr>
<tr>
<td>JST</td>
<td>In Work</td>
<td>Manufacturer</td>
<td>07/18/2007</td>
<td>07/18/2007</td>
</tr>
<tr>
<td>KEMET</td>
<td>In Work</td>
<td>Manufacturer</td>
<td>07/18/2007</td>
<td>07/18/2007</td>
</tr>
<tr>
<td>KEYSTONE</td>
<td>In Work</td>
<td>Manufacturer</td>
<td>07/18/2007</td>
<td>07/18/2007</td>
</tr>
<tr>
<td>KINGFORD</td>
<td>In Work</td>
<td>Manufacturer</td>
<td>07/18/2007</td>
<td>07/18/2007</td>
</tr>
<tr>
<td>KINGSTATE</td>
<td>In Work</td>
<td>Manufacturer</td>
<td>07/18/2007</td>
<td>07/18/2007</td>
</tr>
<tr>
<td>KNOWLES</td>
<td>In Work</td>
<td>Manufacturer</td>
<td>07/18/2007</td>
<td>07/18/2007</td>
</tr>
<tr>
<td>KOA</td>
<td>In Work</td>
<td>Manufacturer</td>
<td>07/18/2007</td>
<td>07/18/2007</td>
</tr>
</tbody>
</table>
3.1.1 Home Page
Under the Home tab, there is a tool bar of different pages that applies to the individual user. Shown Below, the Overview page summaries 3 tables:

- User Assignments
- Subscribed updates
- Your Checked out Work
### 3.2 Search

To find individual objects including parts and documents in the PLM system, there are 4 types of searches:

1. Combination of Instream Search Index Engine and general metadata record search
2. Standard System Attribute Search
3. Advance search for specific attributes of an object
4. Classification search (currently not available until ECAD is fully integrated)

Each search functionality various levels of degrees of retrieved information. It all depends on the requirements of the individual user. On every tab of your PLM web page, the Search link. This will access the various options of searching.
3.2.1 Search Index Engine

The text boxes beside the Search link and the Keyword use Instream Search Index Engine. Search Index Engine compiles a list of words from content in text, word or other document types. It behaves like "Google" in database of content files. Wild cards *, such as "*7035*family*tree*", can be used in the text box, then select the Go button. Wild cards will only be affective till October 6, 2007. After October 6, 2007, a new search engine will be available which will also search into content of documents. Different methods of searching cannot be used in conjunction. To activate or proceed with text box beside the Search access page link, the yellow Go button must be selected. For Keyword, the Search button in the bottom right of the page must be selected.
3.2.2 Standard System Attributes Search

Every object has a standard set system attributes are the following:

- Context/Container Type or All Contexts
- Object Type(s) (you can customize)
- Select the following types:
  - Document, EPM document, product, part, library, project
- **DO NOT SELECT ALL TYPES**
- Organization
- Name
- Number
- Last Updated and/or Created date range or specified

If a field is left blank, it is not included in the search criteria. The Search button must be selected.
3.2.3 Advanced Search
The Advanced Search page can perform Boolean arguments of object attribute record values. Based on a single object type, there are more unique set of attributes.
3.2.4 Saved Searches

After entering and customizing the criteria attributes and values, standard object system attribute, advanced and classification searches can be saved by selecting the “Save This Search” button. The search is saved with a name and can be shared to functional groups in the system. The list of saved searches created and accessible are in the pull down list for Saved Searches. To activate a saved search, the Select button must be selected.
3.2.4.1 Global Saved Searches

To hopefully save hours of browsing through folders in libraries, products and projects, saved searches can be effectively used in PLM. To add global saved searches, follow the next steps:

1. Select the Search hyperlink boxed in RED:

2. In the pull down of Saved Searches, select customize:
3. Then select the select button:
4. Check the following searches that all PTX Users have access to, then select the Show icon:
   a. General
   b. Artwork
   c. Family Tree
   d. Manuals
   e. Specification
   f. Part
   g. Document
   h. Supplier
   i. Template
   j. Workflow Process (optional for advanced users)

5. Select the Search hyperlink
### Search

#### Saved Searches (15 items)

<table>
<thead>
<tr>
<th>Name</th>
<th>Last Updated</th>
<th>Show Created On</th>
<th>Created By</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Artwork</td>
<td>12/01/2009</td>
<td>12/01/2009</td>
<td>12/01/2009</td>
<td>pohn</td>
</tr>
<tr>
<td>Template</td>
<td>01/31/2008</td>
<td>01/31/2008</td>
<td>01/31/2008</td>
<td>exwcadmin</td>
</tr>
<tr>
<td>Specification</td>
<td>01/31/2008</td>
<td>01/31/2008</td>
<td>01/31/2008</td>
<td>exwcadmin</td>
</tr>
<tr>
<td>Manual</td>
<td>02/07/2008</td>
<td>02/07/2008</td>
<td>02/07/2008</td>
<td>exwcadmin</td>
</tr>
<tr>
<td>Manual</td>
<td>02/07/2008</td>
<td>02/07/2008</td>
<td>02/07/2008</td>
<td>exwcadmin</td>
</tr>
<tr>
<td>FAB DWG</td>
<td>12/05/2007</td>
<td>12/05/2007</td>
<td>12/05/2007</td>
<td>exwcadmin</td>
</tr>
<tr>
<td>Past Corrected Running Processes</td>
<td>01/07/2008</td>
<td>01/07/2008</td>
<td>01/07/2008</td>
<td>exwcadmin</td>
</tr>
<tr>
<td>Family Tree</td>
<td>12/05/2007</td>
<td>12/05/2007</td>
<td>12/05/2007</td>
<td>PTX All PLM Users</td>
</tr>
<tr>
<td>Artwork</td>
<td>12/05/2007</td>
<td>12/05/2007</td>
<td>12/05/2007</td>
<td>exwcadmin</td>
</tr>
<tr>
<td>Last Search</td>
<td>02/07/2008</td>
<td>11/29/2007</td>
<td>pohn</td>
<td>pohn</td>
</tr>
<tr>
<td>Organisations</td>
<td>01/05/2008</td>
<td>01/05/2008</td>
<td>01/05/2008</td>
<td>pohn</td>
</tr>
</tbody>
</table>

Page 1 of 1  First 1 Last
6. Under the Saved Searches pull down, select the appropriate item you are looking for. In this case, manuals are selected. **When in doubt, select General search.** Then select the Select button:
7. Under the document Category select your appropriate category of document type (manual in this case). You can then put a wild card in the name text field if you do not know the number, such as, *7535*. Then select the Search button:
8. In this case, I selected Quick Start User Guide and the following results appear:
The current classifications were based on the following nomenclature of document names:

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Pattern</th>
<th>Category</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drawing</td>
<td>DOC ART</td>
<td>Art Work</td>
<td>Remove</td>
</tr>
<tr>
<td>Drawing</td>
<td>DOC FAB</td>
<td>MFG Assembly</td>
<td>Remove</td>
</tr>
<tr>
<td>Manual</td>
<td>Quick Start Guide</td>
<td>Quick Start Guide</td>
<td>Remove</td>
</tr>
<tr>
<td>Manual</td>
<td>manual, user</td>
<td>User Manual</td>
<td>Remove</td>
</tr>
<tr>
<td>Manual</td>
<td>manual, service</td>
<td>Service Manual</td>
<td>Remove</td>
</tr>
<tr>
<td>Drawing</td>
<td>FAMILY TREE</td>
<td>Family Tree</td>
<td>Remove</td>
</tr>
<tr>
<td>Drawing</td>
<td>ARTWORK</td>
<td>Art Work</td>
<td>Remove</td>
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<td>Specification</td>
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<td>Specification</td>
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<td>Specification</td>
<td>Remove</td>
</tr>
</tbody>
</table>
3.2.5 Search Results

Search Results are based on the following criteria:

- the user access to the objects in the search criteria
- search criteria
- if the objects actually exist in the system

When a search is performed, the results are found in the Search Results table on the bottom of the page.
4 Object Details Page

When selecting the actual file content, you can select the details or information page of the object, by selecting the small icon.

To download the primary content file, select on the highlighted icon. If there is no primary content, you will be automatically open the details information page.
4.1 Part Details Page
4.1.1 Custom Related Reports

Our PTX IS team have created major amounts of customizations to improve the user interface of PLM. Some of these customizations found in the Related Reports of each part details page and the As Stored, Latest Iteration and Latest Version under Product Structure.
4.2 CAD Document Details Page
4.3 Document Details Page
5 Viewing Parts and Documents using ProductView

In the example results above, a wildcard search was performed with the following criteria *1070482*. If a part or a product was selected and it was actively associated to 3D CAD documents, the hyperlink would open a product view client. If the hyperlink to the CAD or standard documents, the details or information page of that object will open.
5.1 ProductView Client
ProductView client behaves differently for 3D and 2D viewables.

5.1.1 ProductView Client Behaviour for Parts and 3D CAD Documents
There are 2 ways of accessing ProductView client for parts:

- Selecting the part name hyperlink shown above when a search is performed (see previous slide)
- Selecting the PTC Windchill Visualization System (WVS) thumbnail icon in the details page of the part or 3D CAD model (see below in the red rectangle)
Ensure you select the following to see the viewable.
5.1.2 ProductView Client Behaviour for 2D CAD and Standard Documents
The details page of a document or 2D CAD drawing does not have the 3D thumbnail. Instead it is just a blank document or ProductView icon respectively.
Ensure that the following icons and text have be activated.