

Supporting Documents in Windchill Collector for Commonspace Save As

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March 2013

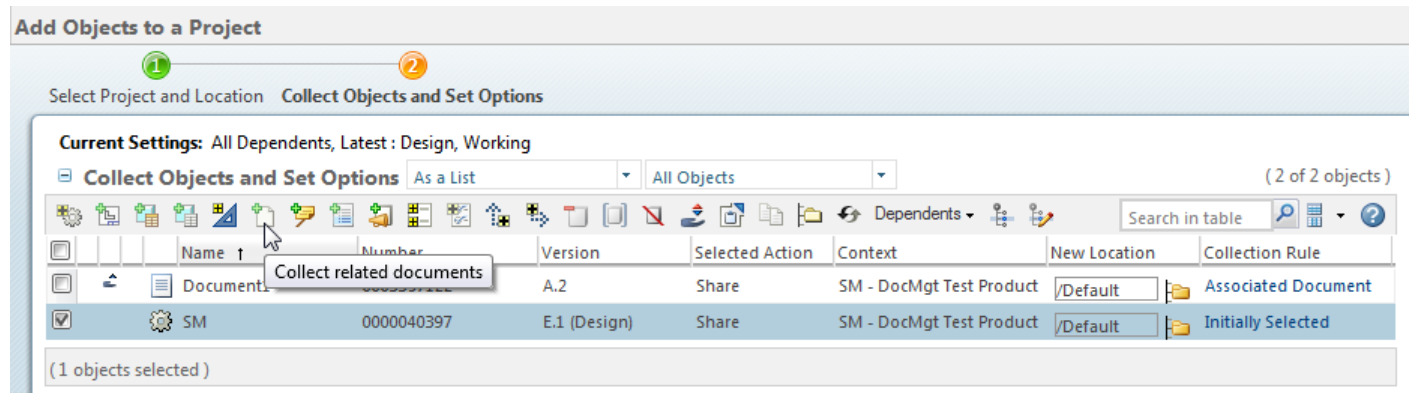
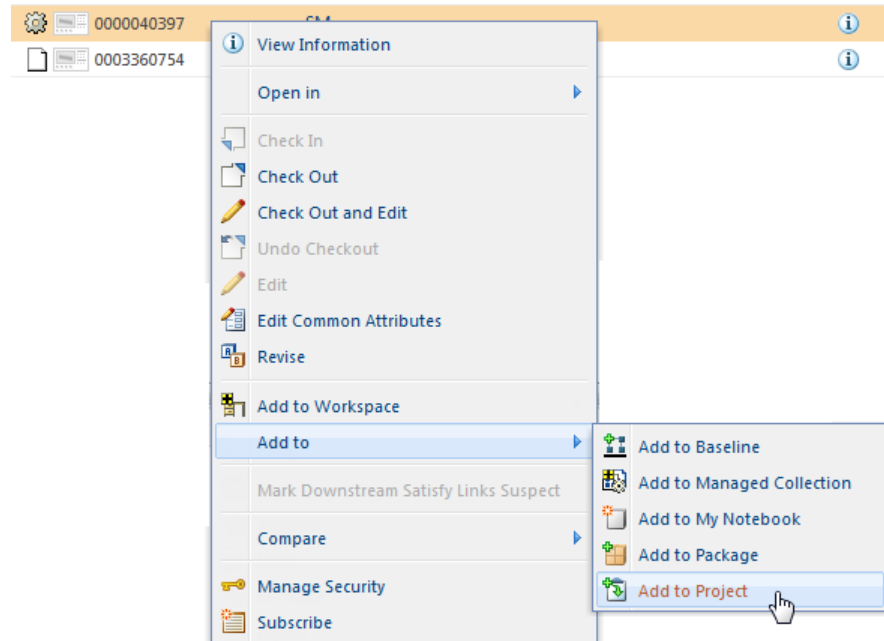


Customer Perception

Where Documents are Supported

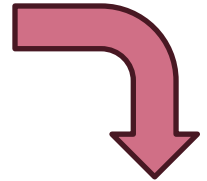
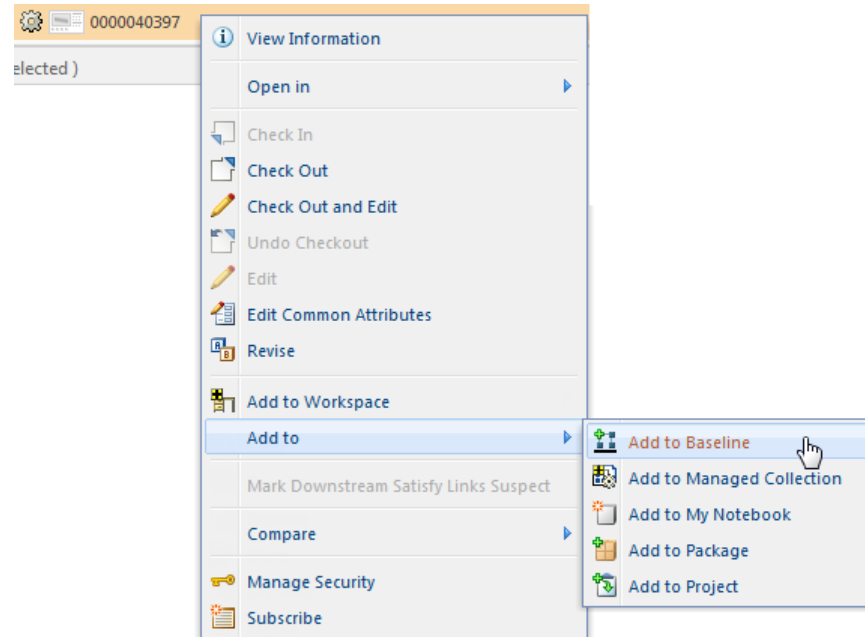
Documents ARE Supported

- Documents can be collected from Parts and vice-versa



Documents ARE Supported

- Documents can be collected from Parts and vice-versa



Current Settings: All Dependents, Latest : Design, Working

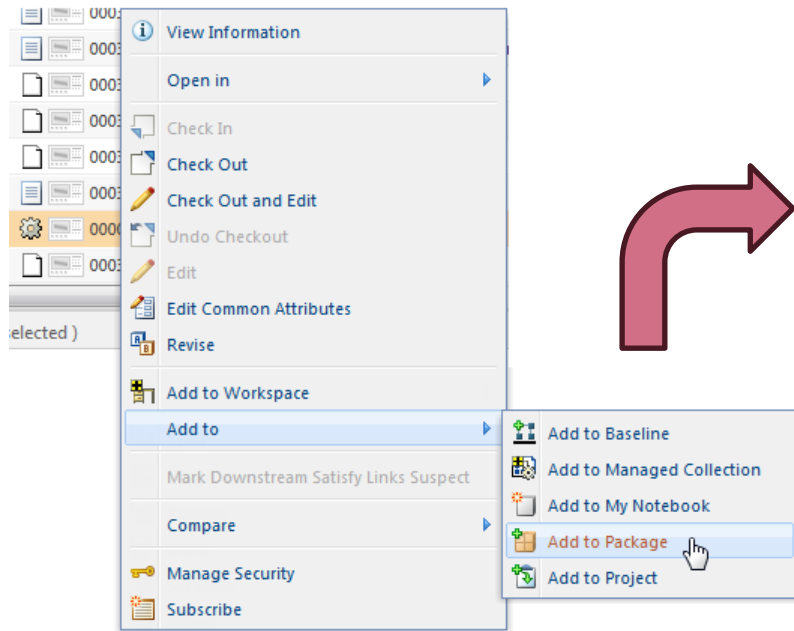
Collect Objects As a List (4 of 4 objects)

	Number	Version	Name	File Name	Collection Rule	Last Modified
	0003733527	A.1	Sample Document		Associated Document	2014-03-21 08:08 EDT
	0003357122	A.3	Document1		Associated Document	2013-01-30 10:41 EST
	0000040397	E.2 (D...	SM		Initially Selected	2014-03-21 08:10 EDT
	0003360754	A.1	SM-REFDOC1		Associated Document	2013-01-29 11:50 EST

(0 objects selected)

Documents ARE Supported

- Documents can be collected from Parts and vice-versa



Current Settings: All Dependents, Latest : Design

Dependencies

Dependencies: All Limit Expansion Level to:

Collect Related Business Objects

Drawings: None Documents: All (dropdown menu open showing: All, Initially Selected Only, None)

Family Table: None Resulting Data: None Notes: None

Generics: None

CAD / Dynamic Documents:

Parts: None Published Content: None

Where Used: None Replacements: None

Collect Related Change Objects

Problem Reports: None

Variations: None

Current Settings: All Dependents, Latest : Design

Collect Objects As a List (4 of 4 objects)

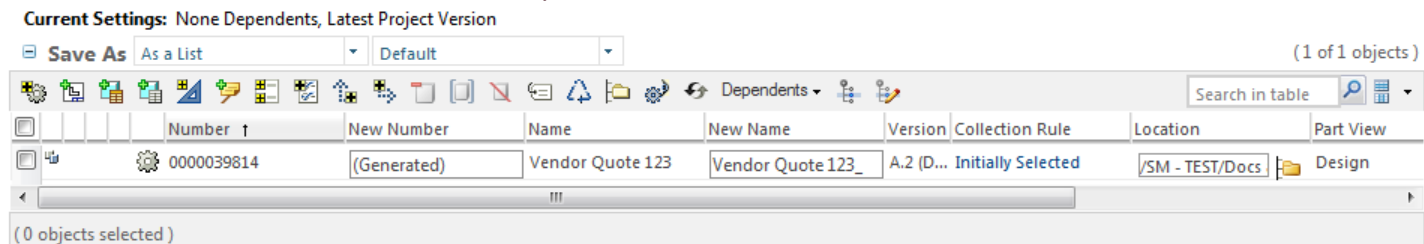
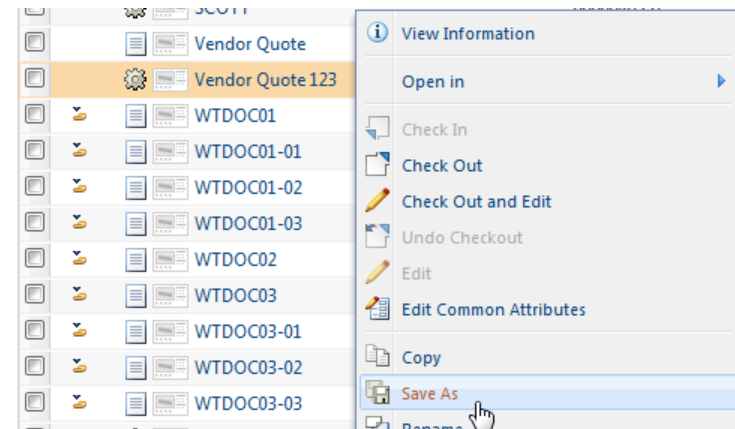
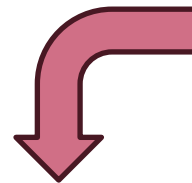
	Name	Number	Version	Context	Collection Rule
	Document1	0003357122	A.3	SM - DocMgt Test Pr...	Associated Document
	Sample Document	0003733527	A.1	SM - DocMgt Test Pr...	Associated Document
	SM	0000040397	E.2 (D...	SM - DocMgt Test Pr...	Initially Selected
	SM-REFDOC1	0003360754	A.1	SM - DocMgt Test Pr...	Associated Document

Customer Perception

Where its NOT Supported

No Document Support

- No Save As action for Documents
- No Option to Collect Documents from Parts
 - No option to save a copy of associated documents
 - Existing document references are saved to the new parts
 - User has no control over the document links during the Save As operation
 - If unwanted, they must be removed manually
- Save As Results Only Allowed in PDM Container (no PJJ)
 - Fixed with X-24_M020



Old Document Links are Maintained During Save As

The screenshot illustrates the 'Save As' process in PTC software. On the left, a tree view shows a design structure with parts like WTPART01 through WTPART05 and documents like WTD0C01 through WTD0C03. A context menu is open over the tree, with the 'Save As' option highlighted. A red arrow points from this menu to the 'Current Settings' table below. The table shows the mapping of old document names to new ones after a 'Save As' operation. The 'Current Settings' table is as follows:

Number	1	New Number	Name	New Name	Version	Collection Rule	Location	Part View
0000040812		(Generated)	WTPART01	WTPART01_	A.1 (D...	Initially Selected	/SM - DocMgt Te	Design
0000040813		(Generated)	WTPART02	WTPART02_	A.1 (D...	Initially Selected	/SM - DocMgt Te	Design
0000040814		(Generated)	WTPART03	WTPART03_	A.1 (D...	Initially Selected	/SM - DocMgt Te	Design
0000040815		(Generated)	WTPART04	WTPART04_	A.1 (D...	Initially Selected	/SM - DocMgt Te	Design
0000040816		(Generated)	WTPART05	WTPART05_	A.1 (D...	Initially Selected	/SM - DocMgt Te	Design
0003529869			WTD0C01		A.1	Initially Selected	/SM - DocMgt Test Product/TEST	
0003529872			REFDOC01		A.1	Initially Selected	/SM - DocMgt Test Product/TEST	
0003529873			WTD0C02		A.1	Initially Selected	/SM - DocMgt Test Product/TEST	
0003530209			WTD0C03		A.1	Initially Selected	/SM - DocMgt Test Product/TEST	

On the right, another tree view shows the updated design structure after the 'Save As' operation. The document links are maintained, showing the new part numbers (e.g., 0000043963, 0000043961, 0000043962, 0000043964, 0000043965) and their associated documents. A red arrow points from the 'Save As' menu to this updated tree view.

No Document Support

- Cannot Collect Documents from Parts during Add to WS
- No Add to Workspace action for Documents
 - Multi-doc Set State in 10.1 M040
 - Need is Multi-doc Rename

Primary use case is to support multi-document actions that are not supported in Windchill

The screenshot shows a CAD software interface. On the left, a tree view lists various documents, with 'Vendor Quote 123' selected. A context menu is open over it, showing options like 'View Information', 'Open in', 'Check In', 'Check Out', 'Check Out and Edit', 'Undo Checkout', 'Edit', 'Edit Common Attributes', 'Copy', 'Save As', 'Rename', 'Route', 'Set State', 'Export', 'Delete', 'Delete Non-latest Iterations', 'Reassign View', 'Add to Workspace', and 'Add to'. A red arrow points from the 'Add to Workspace' option to the 'Advanced' tab of the top property panel.

The top property panel (Advanced tab) shows 'Current Settings: None Depends, Latest Project Version' and 'Dependencies' section with 'Depends: None' and 'Limit Expansion Level to:'. Below is the 'Collect Related Business Objects' section with dropdowns for 'Parts: None', 'Drawings: None', 'Family Table: None', 'Generics: None', 'CAD / Dynamic Documents: None', 'Image: None', 'Source: None', and 'Published Content: None'.

The bottom property panel (Advanced tab) shows 'Current Settings: None Depends, Latest Project Version' and an 'Object List' table with columns 'Name', 'File Name', 'Version', and 'Collection Rule'. The table contains one entry: 'Vendor Quote 123' with 'A.2 (Design)' version and 'Initially Selected' collection rule. Below the table, it says '(0 objects selected)'.