

Siemens PLM Connection

**Teamcenter Office 2007 Client Preview
Look at What's New for Teamcenter 8**

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PLM Connection**



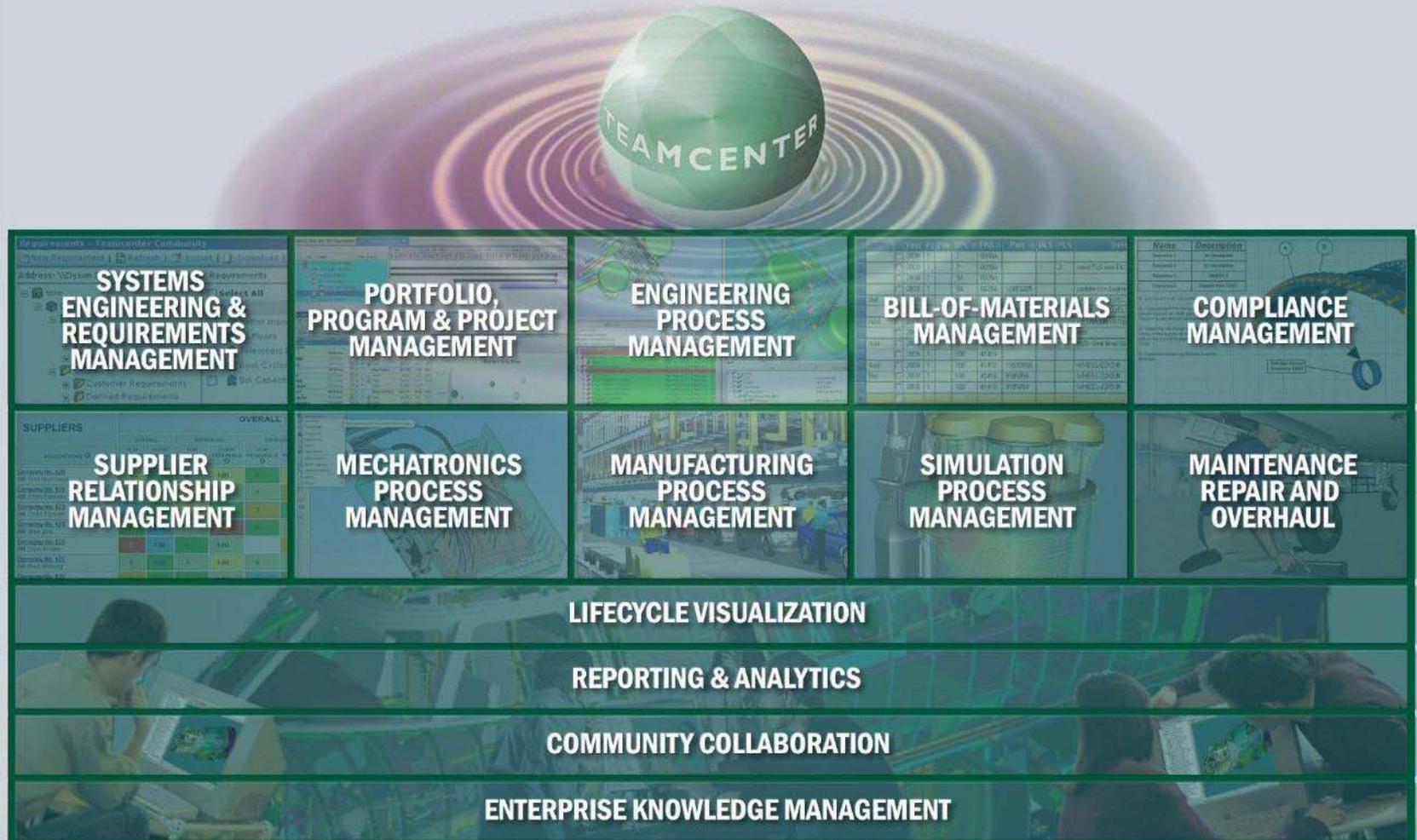
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PLM Software

Answers for industry.

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Teamcenter Digital Lifecycle Management Solutions



Agenda

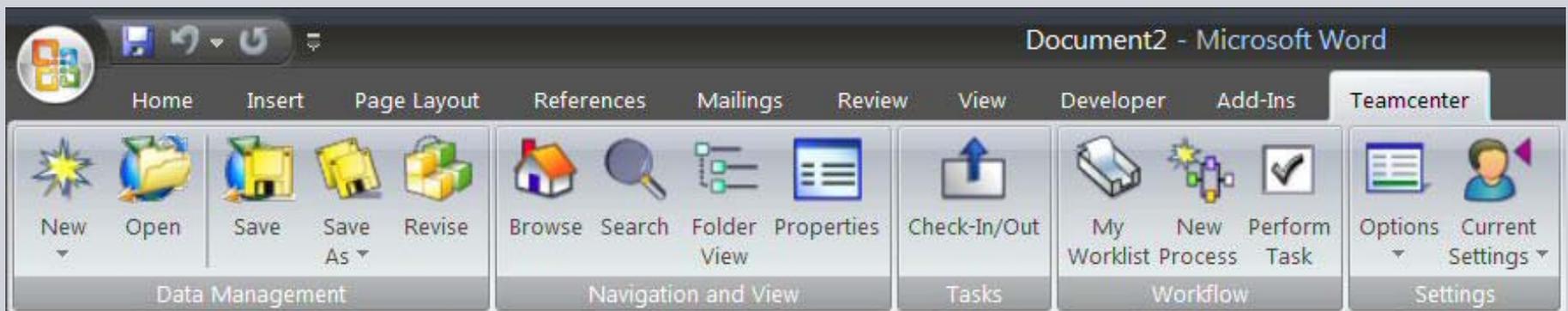
- Introduction
- Use Case Scenarios
- Technology
- Demo
- Potential Futures
- Q & A



Introduction

What's New?

- Microsoft Office client integration in **Teamcenter 8**
 - Focus on common Office user
 - Supports these key 2007 Microsoft Office applications
 - Outlook
 - Word
 - Excel
 - PowerPoint
 - Provides consistent Teamcenter integration point via Ribbon

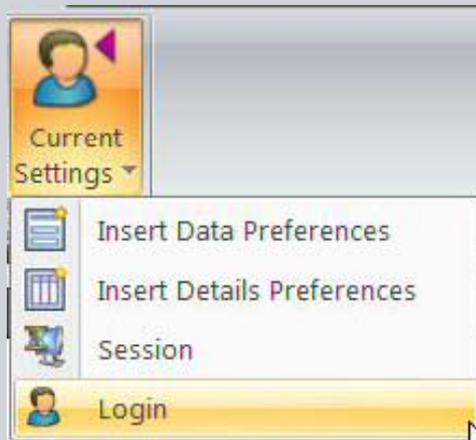


- **Key Features**
 - Intuitive UI tailored for Office user
 - Ability to interact with Teamcenter content via familiar applications
 - **Browse** → via Folder View
 - **Search** → pre-configured queries with input parameter forms
 - **Check-In/Out** → multiple selection support
 - **Open**
 - **Insert** → content from Teamcenter in configurable formats
 - **Save, Save-As** → named reference on dataset
 - **Create** → Dataset, Folder, Item, Item Revision
 - **Access Worklist** → create simple processes and perform tasks
 - **View Properties**
 - Consistent security model
 - Teamcenter authentication required

Introduction

What's New?

- Office integration honors Teamcenter security model
- Users must authenticate



Introduction

What's New?

- Teamcenter Worklist can be accessed via Outlook Tasks
- Office user can seamlessly signoff on PLM workflows

The screenshot displays the Microsoft Outlook 'To-Do List' interface. The main pane shows a task titled 'Teamcenter Tasks to Perform' with the following details:

- Subject: 003503/E-MS Office Client : perform-signoffs
- Due date: Due on 5/8/2008
- Status: Not Started
- Priority: Normal
- % Complete: 0%
- Owner: Kraft, Kyle

Below the task details are two tables:

File Name	Owner	Type	Size	Last Modified Date
003503/E-MS Office Client	kraftk	ItemRevision		4/24/2008 8:36:24 AM
SDD_003503	weaver	MSWord		4/2/2008 3:31:29 PM

File Name	Owner	Type	Size	Last Modified Date
SRS_003503	kraftk	MSWord		1/22/2008 9:53:51 AM
FS_003503	kraftk	MSWord		4/21/2008 10:59:21 AM

At the bottom of the task pane, there is a 'Perform Sign-off Task' section with the following instructions:

1. Review attachments.
2. Perform sign-off (Approve/Reject).

Buttons for 'Approve', 'Reject', 'No Decision', and 'Delegate' are visible.

Introduction

What's New?

- Easy access to key documents during workflow signoff in Outlook

Perform Task

Perform Sign-off Task

Task Instructions

- Review attachments.
- Perform sign-off (Approve/Reject).

Comments:

Attachments

	File Name	Owner	Type	Size
	003503/E-MS Office Client	kraftk	ItemRevision	
	SDD_003503	weaver	MSWord	

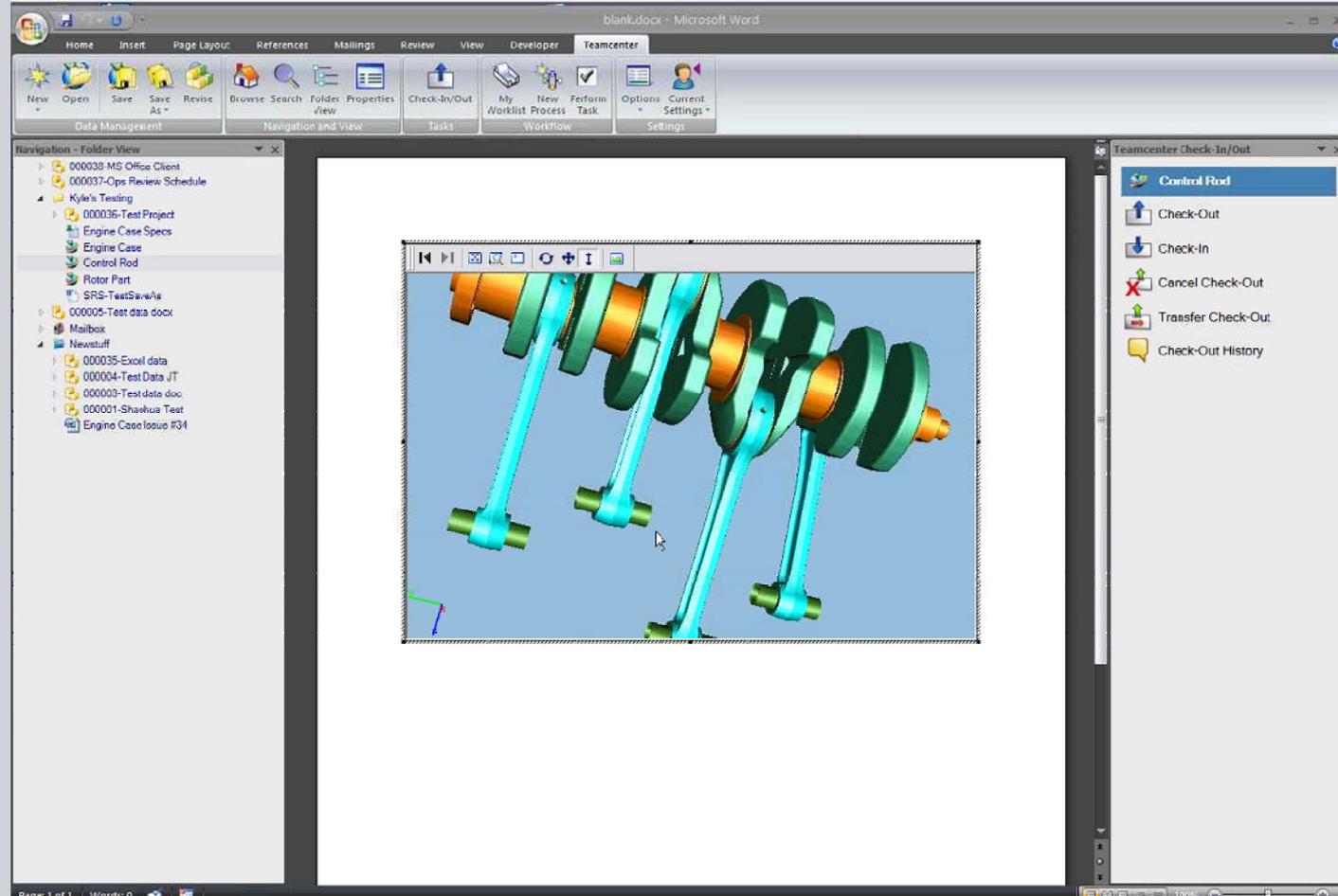
References

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Introduction

What's New?

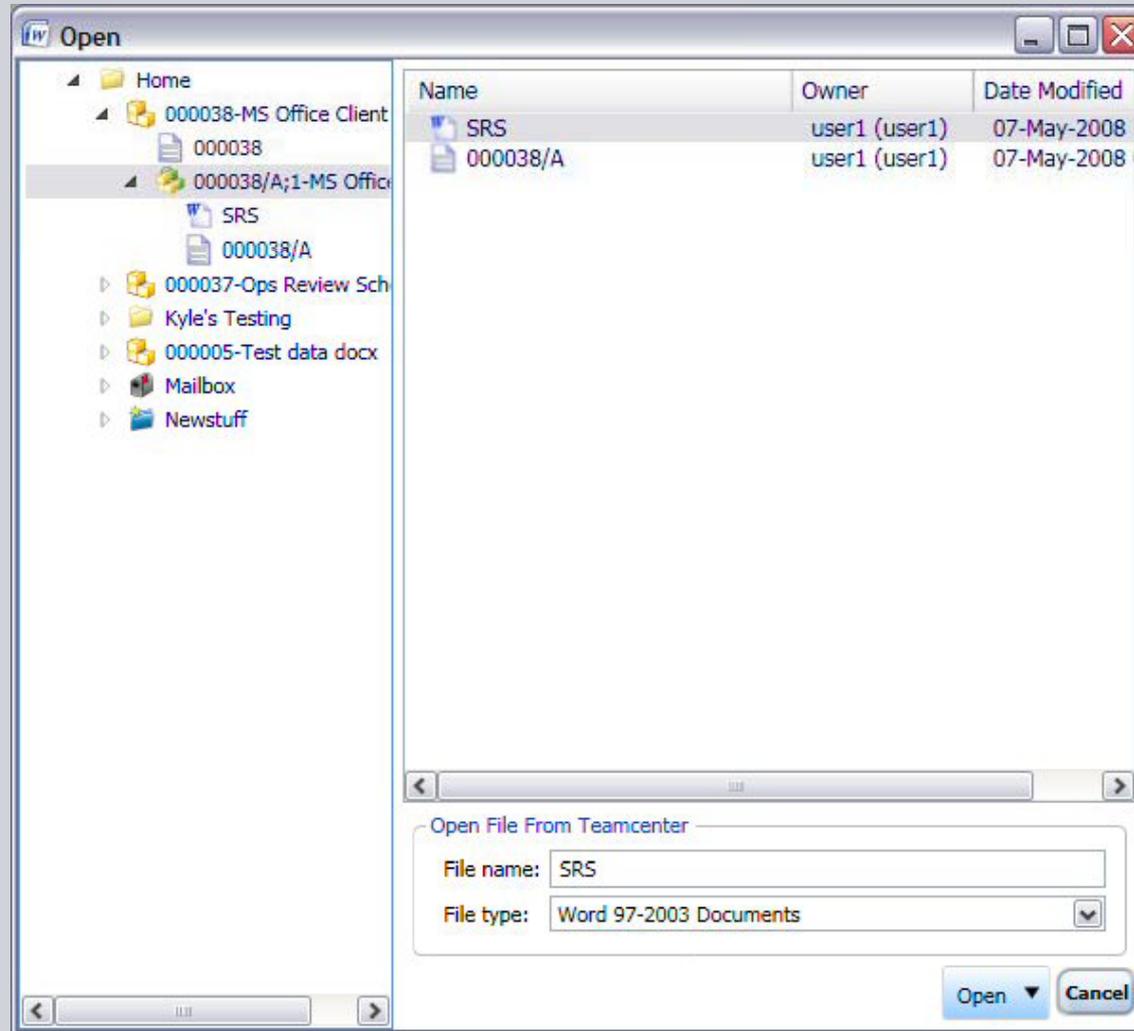
- Browse starts at Home location
- Navigate through Inbox, Searches, Product structure, ...



Introduction

What's New?

- Browse Teamcenter from Office applications to Open documents



Introduction

What's New?

- Search leverages preconfigured queries
- Query parameters are entered via form

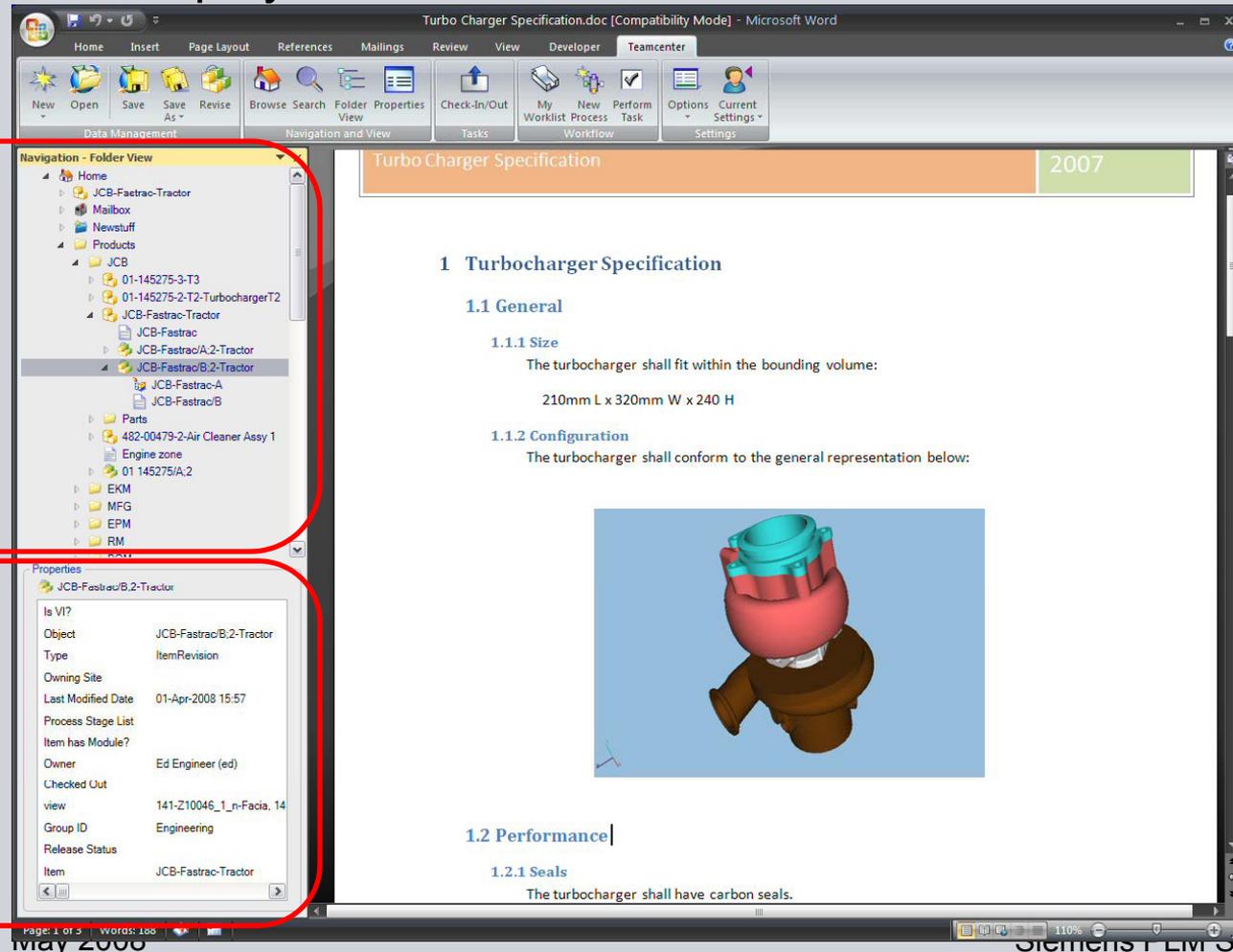
The screenshot shows the 'Advanced Search' dialog box with the following components:

- Queries:** A tabbed interface with 'Checked-Out Dataset... (1)' selected.
- Select Query Type:** A list of preconfigured queries including 'Admin - Employee Information', 'Admin - Group/Role Membership', 'Admin - Item Ownership', 'Admin - Items By Status', 'Admin - Object Ownership', 'Admin - Objects By Status', 'All Sequences', 'CM - BOM Changes', 'CM - Change Forms', 'CM - Change Progress', 'CMII CN Type', 'CMII CR Type', 'Change Revision...', 'Checked-Out Dataset...', 'Checked-Out Objects', 'Dataset Keyword Search', 'Dataset Name', and 'Dataset...'. The 'Checked-Out Dataset...' query is highlighted.
- Custom Query Form:** A form for the selected query with the following fields:
 - Checked-Out by User:
 - Checked-Out After:
 - Checked-Out Before:
 - Owning User:
 - Owning Group:
 - Type:
- Buttons:** 'Find' (with a right arrow icon), 'Save' (with a floppy disk icon), and 'Clear' (with a pink eraser icon).
- Description:** A text box containing 'Find checked-out dataset(s)'.

Introduction

What's New?

- Folder View supports classic hierarchical navigation model
- Properties can be displayed for selected item



Introduction

What's New?

- Key Teamcenter operations supported on selected items
- Check-In, Check-Out, Cancel Check-Out, Transfer Check-Out, ...

The screenshot shows a Microsoft Excel window with a spreadsheet containing review data. A 'Teamcenter Check-In/Out' dialog box is open on the right side, listing the item '003503/E-MS Office Client' and providing several actions: Check-Out, Check-In, Cancel Check-Out, Transfer Check-Out, and Check-Out History. The spreadsheet data includes columns for ID, Revision, Section, Page, Review Comment, Priority, Originating SDLC Phase, Reviewer, and Owner.

ID	*Revision #, Section #, Page #	Review Comment	Priority	Originating SDLC Phase	Reviewer	Owner
15	1 D	Many comments and corrections regarding	1	Functional Specification	Rowlands, Lee	Kraft, Kyle
16	2 D	Many comments requiring minor clarification	2	Functional Specification	Krieg, Kay	Kraft, Kyle
17	3 D	Several comments about design strategy ar	3	Functional Specification	Gosch, Brian J.	Kraft, Kyle
18	4 D	Several more requests for clarification	2	Functional Specification	Krieg, Kay	Kraft, Kyle
19	5 D	Several more requests for clarification	1	Functional Specification	Rowlands, Lee	Kraft, Kyle
20	6 D	Usability and UI changes and clarifications	1	Functional Specification	Palmer, Paul	Kraft, Kyle
21	7 D					
22	8					
23	9					
24	10					
25	11					
26	12					
27	13					
28	14					
29	15					
30	16					
31	17					
32	18					
33	19					
34	20					

Introduction

What's New?

- Intuitive UI panel for common operations
- Active operation expands to show details

Teamcenter Check-In/Out

dte3EMFimage

Check-Out

Optional Parameters

Change ID:

Comments:

Do you want to continue with Check-Out?

Yes No

Check-In

Cancel Check-Out

Transfer Check-Out

Check-Out History

Teamcenter Check-In/Out

dte3ugs

Check-Out

Check-In

Confirm action

Do you want to continue with Check-In?

Yes No

Cancel Check-Out

Transfer Check-Out

Check-Out History

Teamcenter Check-In/Out

dte3stdnote

Check-Out

Check-In

Cancel Check-Out

Transfer Check-Out

Check-Out History

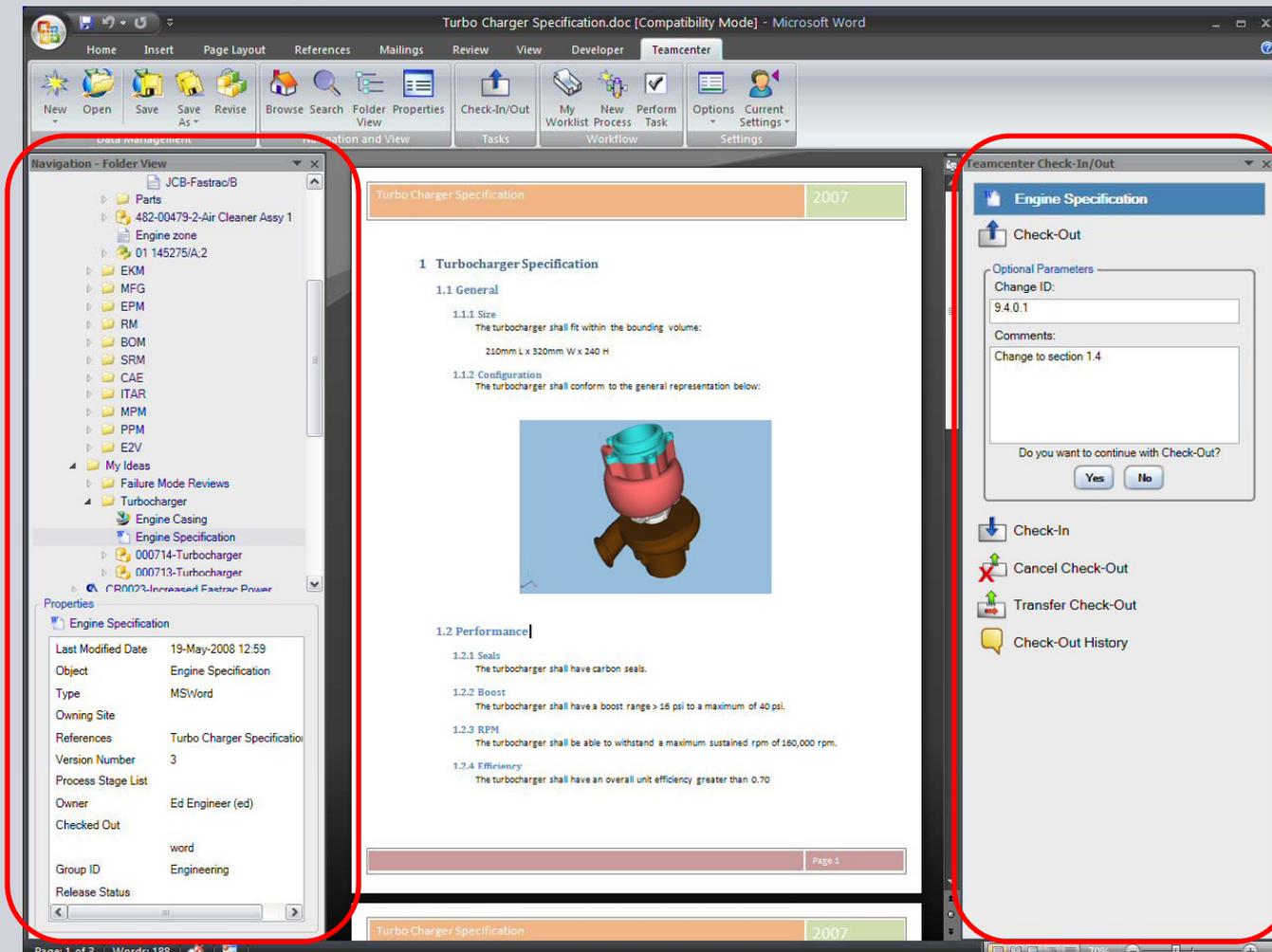
Check-Out History

Date/Time	Activity	User	Change	Com
2008-03-14	Check-Out	dte3 (dte3)	1	test
2008-03-14	Check-In	dte3 (dte3)	1	
2008-03-14	Check-Out	dte3 (dte3)		

Introduction

What's New?

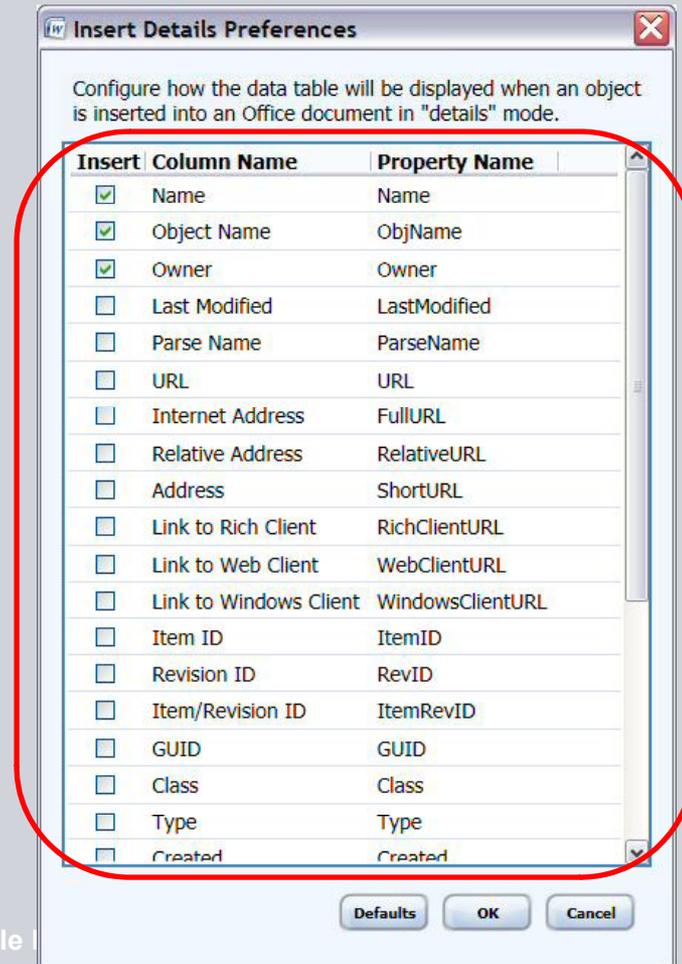
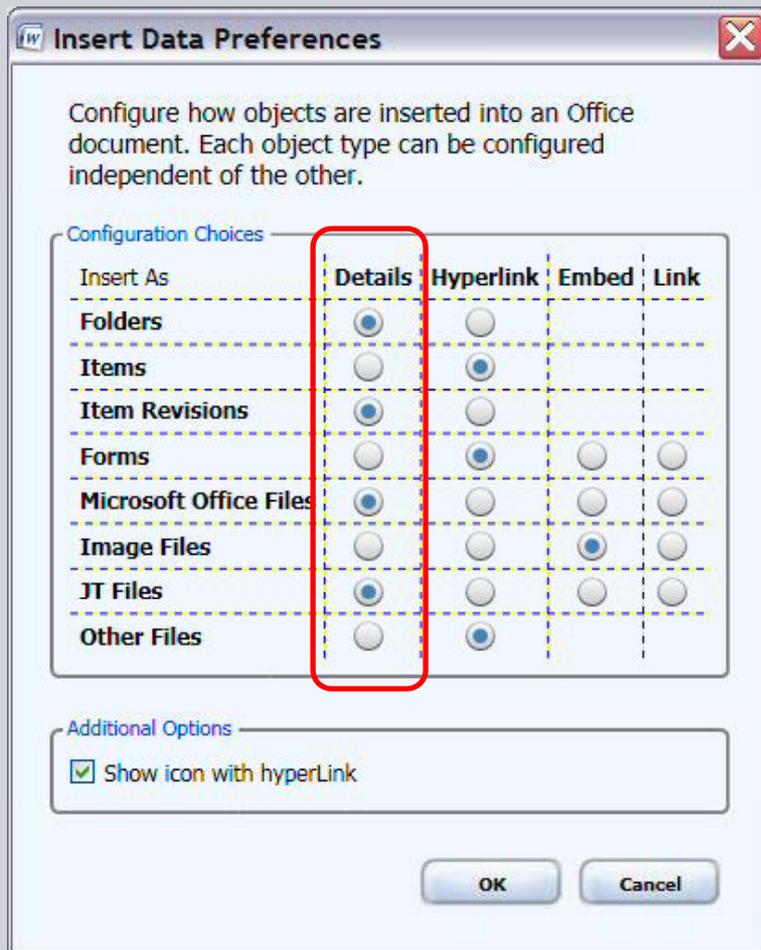
- Teamcenter Integration shown in panels once documents opened in Microsoft Office applications



Introduction

What's New?

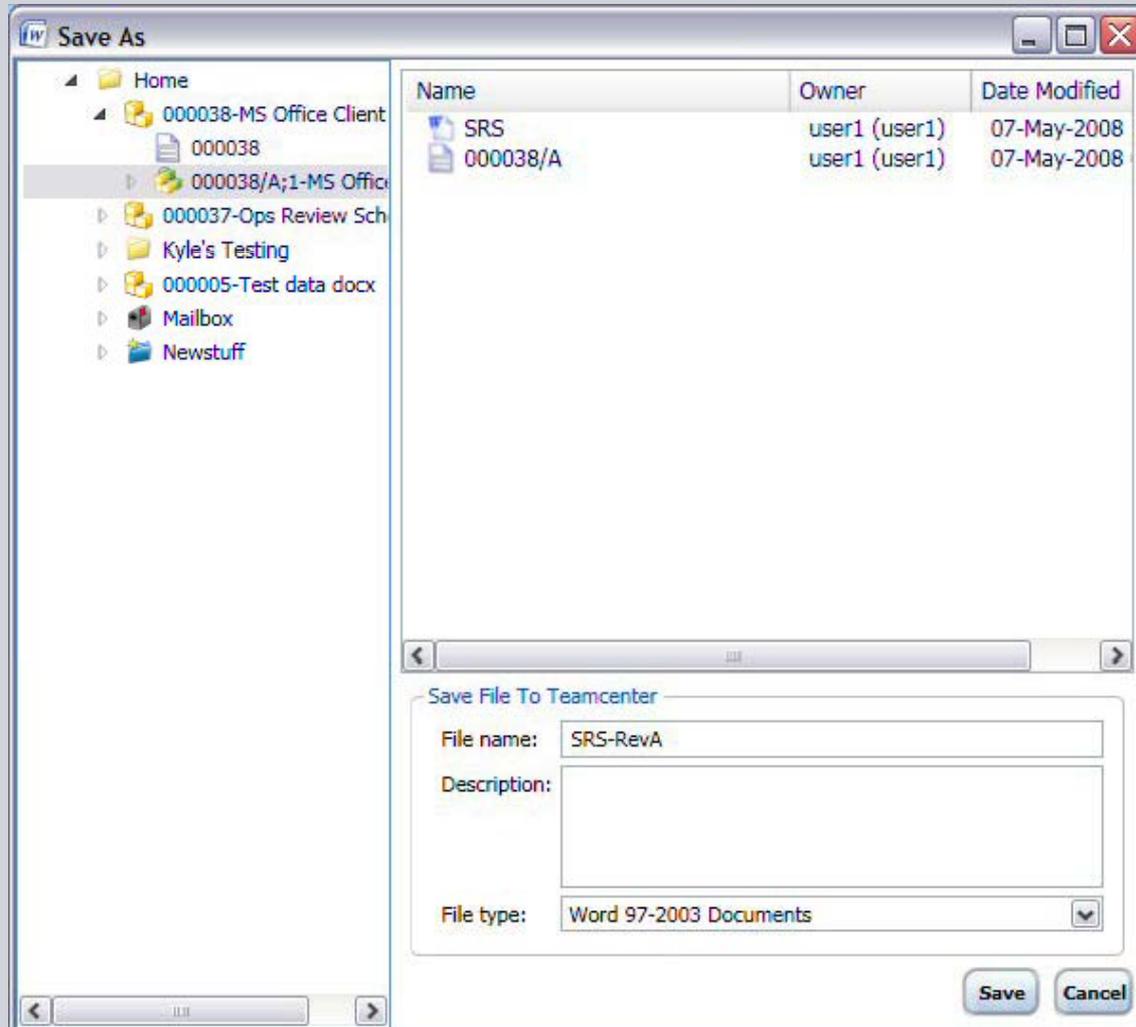
- Insert data from Teamcenter into Office applications
- Preferences configure how data will be inserted



Introduction

What's New?

- Ability to Save and Save-As to Teamcenter



Why invest in Office Integration with Teamcenter?

- **Background**

- Microsoft Office is the de facto standard for authoring and editing general business data
- There are a lot more Office users than PLM users
- Users will often resist putting data into the managed environment if it requires extra steps and is not intuitive

- **Business Value**

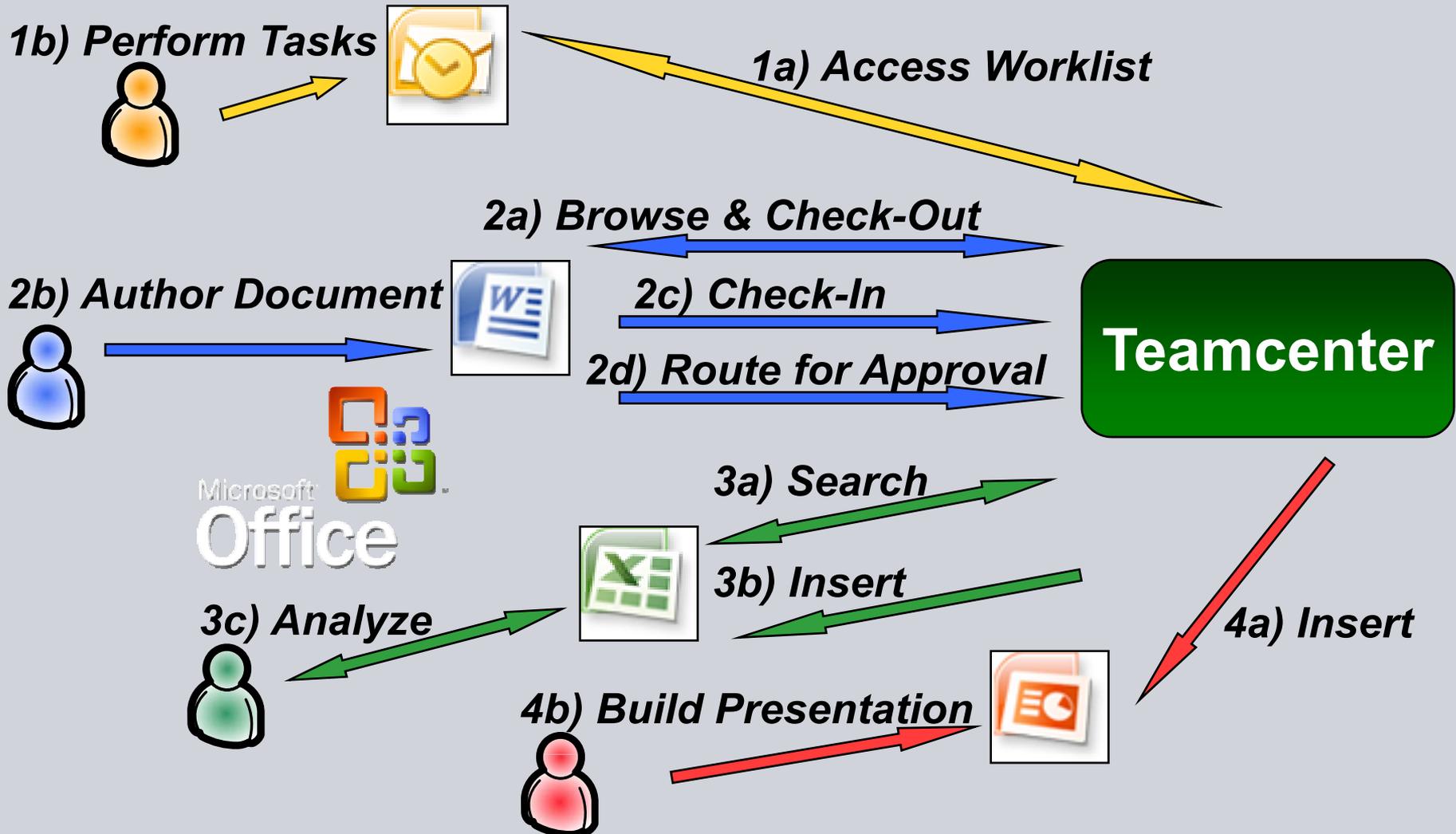
- Extend reach/impact of PLM in the enterprise
- Ensure Office users can easily access the information they need
- Enable efficient business process flow via PLM workflow integration

Use Case Scenarios

Background – Capability Mapping

Capability	Outlook	Word	Excel	PPT
<i>Teamcenter Authentication</i>				
<i>Browse</i>				
<i>Search</i>				
<i>Check-In/Out</i>				
<i>Open/Save/Save-As</i>				
<i>Insert</i>				
<i>Create Dataset/Folder/Item/Item Revision</i>				
<i>View Properties</i>				
<i>Worklist/Tasks</i>				

Use Case Scenarios Big Picture



- ***Outlook***
 - Integrated task management
 - Perform signoffs
- ***Word***
 - Review documents and approve/reject (with comments)
 - Author documents and insert PLM content:
 - 2D and 3D content
 - Tabular data (then format)
 - Embedded Office objects
 - Hyperlinks
- ***Excel***
 - Insert data and analyze (e.g. formulas, pivot tables/charts, etc.)
- ***PowerPoint***
 - Develop management presentation (leveraging search results)

Technology

What's Under the Covers?

- **Development Focus**

- Build reusable UI elements on consistent foundation

- **Microsoft**

- Office Applications

- Integration based on Windows Presentation Foundation (WPF)
Office Add-In

- Infrastructure

- .NET 3.5

- Development Environment

- Visual Studio 2008
- Visual Studio Tools for Office (VSTO 3.0)

- **Teamcenter**

- Integration Interface

- Teamcenter Service Oriented APIs (SOAs)

- File Transfer

- Teamcenter File Management Service (FMS)

▪ **Flow**

- Office user sees new PLM task in Outlook (to revise a document)
- Browse & check-out document to Word
- In Word, insert live 3D image to clarify textual description
- Open Excel, run pre-configured search and insert tabular data
- Analyze data in Excel and generate summary chart
- Copy chart from Excel and paste into Word
- Check-In Word document into Teamcenter and route for approval
- Sign-off on task in Outlook

▪ **Key Points**

- User supports PLM business process via Office applications that work together to accomplish task
- User can access all required data from familiar applications

- **Enhanced Workflow integration**
 - Support more advanced capabilities
- **Intelligent Teamcenter product structure insertion into Office documents**
 - Key attributes populated in Excel to support detailed analysis
 - For example formulas, macros, pivot tables/charts, ...
- **Rights Management integration**
 - Provide secure ecosystem for extract and send scenarios
- **Mobility Support**
 - For example, PLM tasks via Outlook displayed on cell phone
- **Automatic Outlook task synchronization**
 - Driven via server process
- ...

Q & A



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THANK YOU!

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