



PLMWorld 2006: Solid Edge *Managing Insight*

Steve Urich – UGS

Darren Deatz – UGS





Agenda



- ▶ Sharepoint Considerations for Insight
- ▶ Managing Solid Edge Documents
- ▶ Collaboration, View and Markup
- ▶ Life Cycle Assistant



Sharepoint Considerations for Insight



- ▶ First, a quick Tour of a simple Sharepoint / Insight implementation...

Home Documents and Lists Create Site Settings Help Up to Team Web Site

Engineering Site

[Modify Shared Page](#)

Quick Launch

Documents

- [PreReleased](#)
- [Released](#)
- [Markups](#)
- [Obsolete](#)

Pictures

- [Marketing Pictures](#)

Lists

- [Contacts](#)
- [Tasks](#)

Discussions

- [General Discussion](#)

Surveys

Engineering Sub Site

Announcements

There are currently no active announcements. To add a new announcement, click "Add new announcement" below.

[Add new announcement](#)

Events

[New Item](#) | [Link to Outlook](#) | [Today](#) | [View by Day](#) | [View by Week](#) | [View by Month](#)

September 2005						
Sun	Mon	Tue	Wed	Thur	Fri	Sat
28	29	30	31	1	2	3

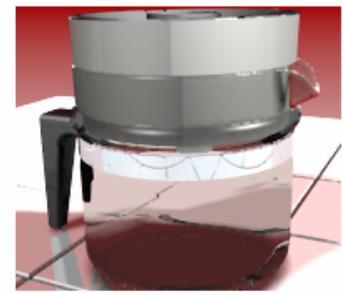
Site Navigator Web Part

- [Team Web Site](#)
- [Engineering Gateway](#)
- [Procurement](#)
- [Solid Edge](#)

Site Navigator © 2004 ADVIS

Tasks

Title [Assigned To](#)





Sharepoint Considerations for Insight



▶ Taxonomy of a Sharepoint Site

▶ Structure



▶ Security

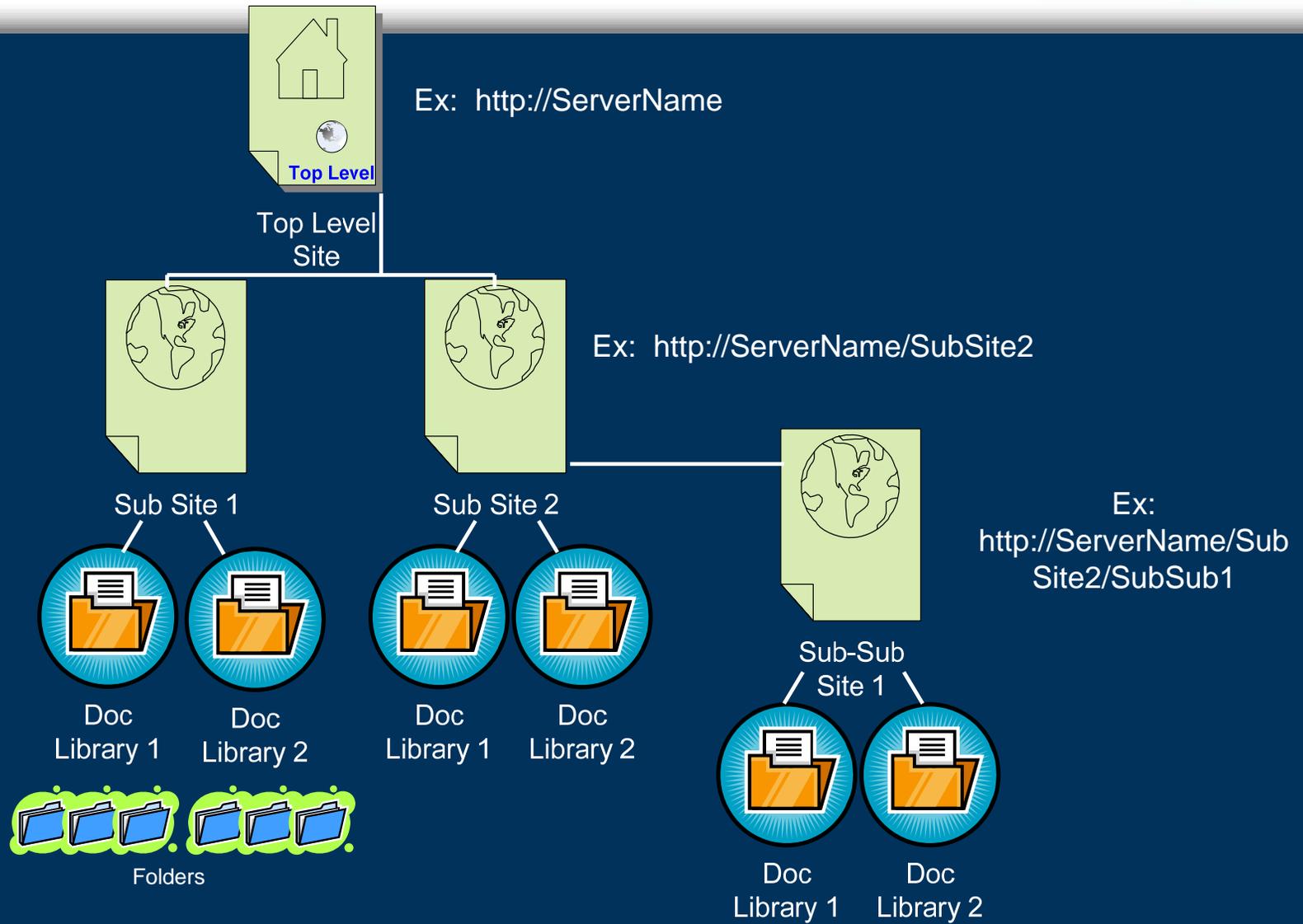


▶ Properties





I. Sharepoint Site Structures





SharePoint Site Structures



<http://Insight/ENG/PreReleased/CoffeePot>





Security



- ▶ Sharepoint can make use of your existing users and groups using Domain Accounts, Active Directory Services, or Local Server Users and Groups.
- ▶ You can use these existing Group organizations or create new organizations called Site Groups.
- ▶ You can then configure security for these Site Groups.
- ▶ Finally, you can decide to let each site inherit security, or configure security per site.



Security – Site Level Options



Home Documents and Lists Create **Site Settings** Help

Engineering Site SOLID EDGE

Documents
PreReleased
Released

Engineering Sub Site
Solid Edge Search



Solid Edge
Site Settings

Use the links on this page to manage site se

Administration

Use the links in this section to add or

- Manage sites and workspaces
- Go to Site Administration



Solid Edge
Site Administration

Use the links on this page to perform adminis

Users and Permissions

This site inherits user access rights fro

- Manage permission inheritance
- Manage cross-site groups



Security – Top Level Options



Home Documents and Lists Create Site Settings Help

Team Web Site
Top-level Site Administration

Use the links on this page to perform administrative tasks.

Users and Permissions

Use these links to manage permissions for the site.

- Manage users**
- Manage site groups
- Manage anonymous access
- Manage cross-site groups
- Manage access requests



Team Web Site
Manage Users

Use this page to add new users, remove users from all site groups, or assign users to site groups. The following users have been added to the site. To remove a user from the site, click the user's name in the list.

Add Users | Remove Selected Users | Edit Site Groups of Selected Users

<input type="checkbox"/> Select All	Users	User Name	Site Groups
<input type="checkbox"/>	accounting	INSIGHT\accounting	Contributor
<input type="checkbox"/>	aruda	INSIGHT\aruda	Contributor
<input type="checkbox"/>	Change Control Board Final Approver	INSIGHT\ccb_approver	Contributor
<input type="checkbox"/>	deatz	INSIGHT\deatz	Contributor, Administrator
<input type="checkbox"/>	drake	INSIGHT\drake	Contributor
<input type="checkbox"/>	engineer	INSIGHT\engineer	Contributor
<input type="checkbox"/>	Fixture Designer	INSIGHT\fixture	Contributor
<input type="checkbox"/>	INSIGHT\administrator	INSIGHT\administrator	Administrator
<input type="checkbox"/>	malcove	INSIGHT\malcove	Contributor



Security – Top Level Options



Home Documents and Lists Create Site Settings Help

Team Web Site
Top-level Site Administration

Use the links on this page to perform administrative tasks.

Users and Permissions

Use these links to manage permissions for the site.

- Manage users
- Manage site groups**
- Manage anonymous access
- Manage cross-site groups
- Manage access requests



Team Web Site
Manage Site Groups

Use this page to add new site groups, delete site groups, or change a site group's description or site group name in the list.

Add a Site Group | Delete Selected Site Groups

	Site Group	Description
<input type="checkbox"/>	Reader	Has read-only access to the Web site.
<input type="checkbox"/>	Contributor	Can add content to existing lists and documents.
<input type="checkbox"/>	Web Designer	Can create lists and documents.
<input type="checkbox"/>	Administrator	Has full control of the Web site.



Security – Top Level Options



Team Web Site Edit Site Group "Contributor"

Use this page to edit or copy an existing site group. To edit the site group, type a new description or select the rights to include in the site group. To create a site group based on this site group, click **Copy Site Group**.

Site Group Description

Description:

Can add content to existing document libraries and lists.

Rights

Edit which rights are included in this site group. Use the **Select All** check box to select or clear all rights.

Select the rights to include in this site group.

Select All

List Rights

- Manage List Permissions - Grant, deny, or change user permissions to a list.
- Manage Lists - Approve content in lists, add or remove columns in a list, and add or remove public views of a list.
- Cancel Check-Out - Check in a document without saving the current changes.
- Add Items - Add items to lists, add documents to document libraries, add Web discussion comments.
- Edit Items - Edit items in lists, edit documents in document libraries, edit Web discussion comments in documents, and customize Web Part Pages in document libraries.
- Delete Items - Delete items from a list, documents from a document library, and Web discussion comments in documents.
- View Items - View items in lists, documents in document libraries, view Web discussion comments, and set up e-mail alerts for lists.

Site Rights

- Manage Site Groups - Create, change, and delete site groups, including adding users to the site groups and specifying which rights are assigned to a site group.
- View Usage Data - View reports on Web site usage.
- Create Subsites - Create subsites such as team sites, Meeting Workspace sites, and Document Workspace sites.
- Manage Web Site - Grants the ability to perform all administration tasks for the Web site as well as manage content and permissions.
- Add and Customize Pages - Add, change, or delete HTML pages or Web Part Pages, and edit the Web site using a Windows SharePoint Services-compatible editor.
- Apply Themes and Borders - Apply a theme or borders to the entire Web site.
- Apply Style Sheets - Apply a style sheet (.CSS file) to the Web site.
- Browse Directories - Browse directories in a Web site.
- Use Self-Service Site Creation - Create a Web site using Self-Service Site Creation.
- View Pages - View pages in a Web site.



Properties



- ▶ Solid Edge has “hidden” properties that are required for every Document Library that will contain documents that are managed by Insight. These are added using the Workspace Editor at the server.
- ▶ You can then add more properties to manage information that is important to your company and workflow



Properties



- ▶ Properties are managed at the Document Library level.
- ▶ Properties can be required or not in a particular Document Library.

Actions

- Alert me
- Export to spreadsheet
- Modify settings and columns



Columns

A column stores information about each item in the document library. Columns currently in this document library:

Column (click to edit)	Type
Title	Single line of text
SEDocID	Single line of text
SELinkData	Multiple lines of text
SERevisedFrom	Single line of text
SEStatus	Single line of text
SEStatusUser	Single line of text
SELastKnownLocation	Multiple lines of text
SERevisionRoot	Single line of text
SERevisionLevel	Number
Document Number	Single line of text
Revision Number	Single line of text
Material	Single line of text
Stock Code	Single line of text
ERP REF.	Single line of text

- Add a new column
- Change the order of the fields



Properties



- ▶ Typically, properties are added to match those found in Solid Edge document properties. When the name and type are identical, Solid Edge and Sharepoint will synchronize the values in a bidirectional manner.

Name	Value	Type
CUSTOM NAME ...	CUSTOM VALUE FIELD	Text
Density	0.03699434701 lb/in^3	Text
Accuracy	0.99	Text
Stock Code	SC12001	Text
ERP REF.	PK-838	Text

Columns

A column stores information about each...

- Column (click to edit)
- Title
- SEDocID
- SELinkData
- SERevisedFrom
- SEStatus
- SEStatusUser
- SELastKnownLocation
- SERevisionRoot
- SERevisionLevel
- Document Number
- Revision Number
- Material
- Stock Code
- ERP REF.

Sharepoint Properties

SE Properties

Sharepoint Properties



II. Managing Solid Edge Documents



- ▶ Checklists before initial Uploads



- ▶ Uploading Documents



- ▶ Using Sharepoints Dashboard with Solid Edge



- ▶ Managing Documents in Solid Edge





Managing Solid Edge Documents



▶ Preparing to upload data checklist:

- ▶ Find and repair all broken links

Although you CAN upload data with broken links, it's always better to do things right the ~~first~~ first this time.

- ▶ Find duplicate document names
- ▶ Remove non-managed documents
- ▶ Scan for invalid document names
- ▶ Set Sharepoint Properties
- ▶ Determine Organization
- ▶ Configure SearchScope.txt

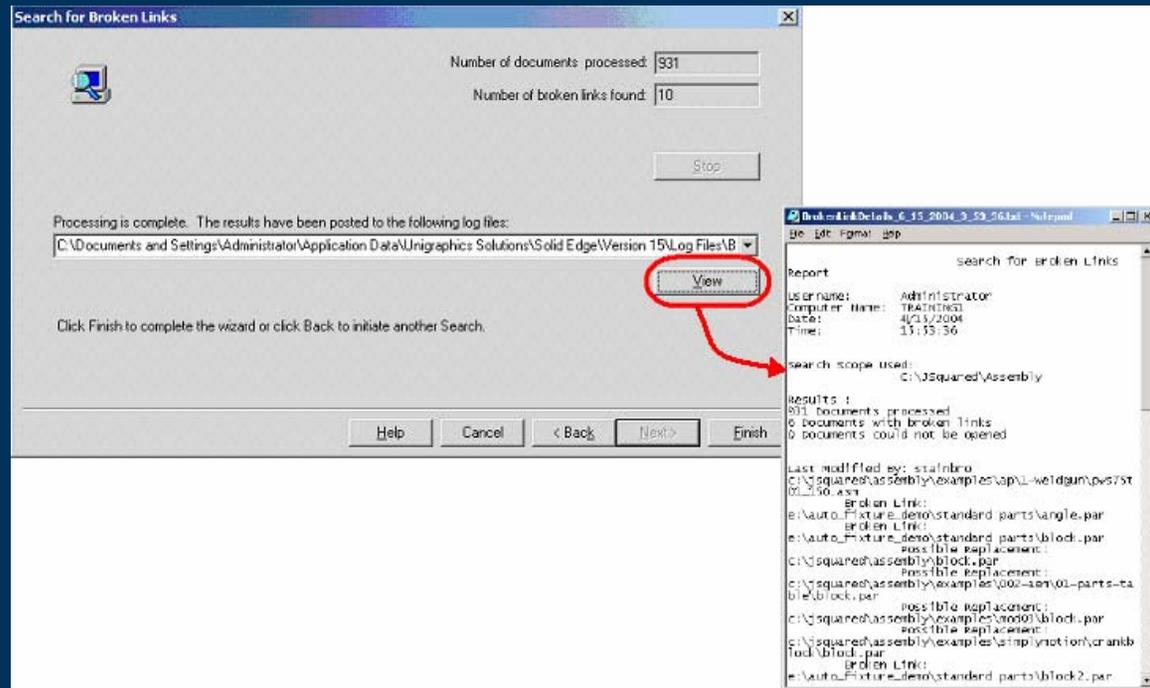




Managing Solid Edge Documents



- ▶ Find and Repair Broken Links
 - ▶ Use Insight Connect tools to find documents that have broken links. This step is crucial to a clean start within Insight.





Managing Solid Edge Documents



► Find Duplicate Document Names

Again, this is the time to clean up past data. If there are 37 temp.par files, we probably still don't know what they are!





Managing Solid Edge Documents



- ▶ Scan for invalid document names:
 - ▶ SharePoint Portal Server supports the same conventions that the file system supports for naming folders and documents. Folder and document names can consist of all Unicode characters except for the following characters:
 - ▶ / \ : * ? " < > | # { } % & ~ or tab characters and multiple periods.
 - ▶ If a file, folder, or URL name in your original site contains one of these characters, it is replaced with an underscore (_). Multiple periods are replaced with a single period. Additional digits may be appended to the file or folder name if there are conflicting renaming changes. Folder names cannot begin with an underscore (_).
 - ▶ If you have unmanaged folders that contain an invalid character, you can rename the folders in Windows Explorer, then use the Redefine Links command to change the links in the files to point to the new folder name.



Managing Solid Edge Documents



- ▶ Limitations on Library Names
 - ▶ Library names can consist of characters from lower ASCII except for the following characters: # : \ ? * < > % / | " { } ~ [] Space ! () = ; . , @ & +
 - ▶ The library name cannot exceed 25 characters in length.



Managing Solid Edge Documents



▶ Uploading Documents

- ▶ Use Insight Connect to upload existing documents.
- ▶ You can upload a Solid Edge structure and merge all of the components into a single directory
 - ▶ OR
- ▶ You can upload an entire folder structure and it will be replicated in the Document Library.

If you choose this option, you must be concerned with the scope of all of the documents' links.

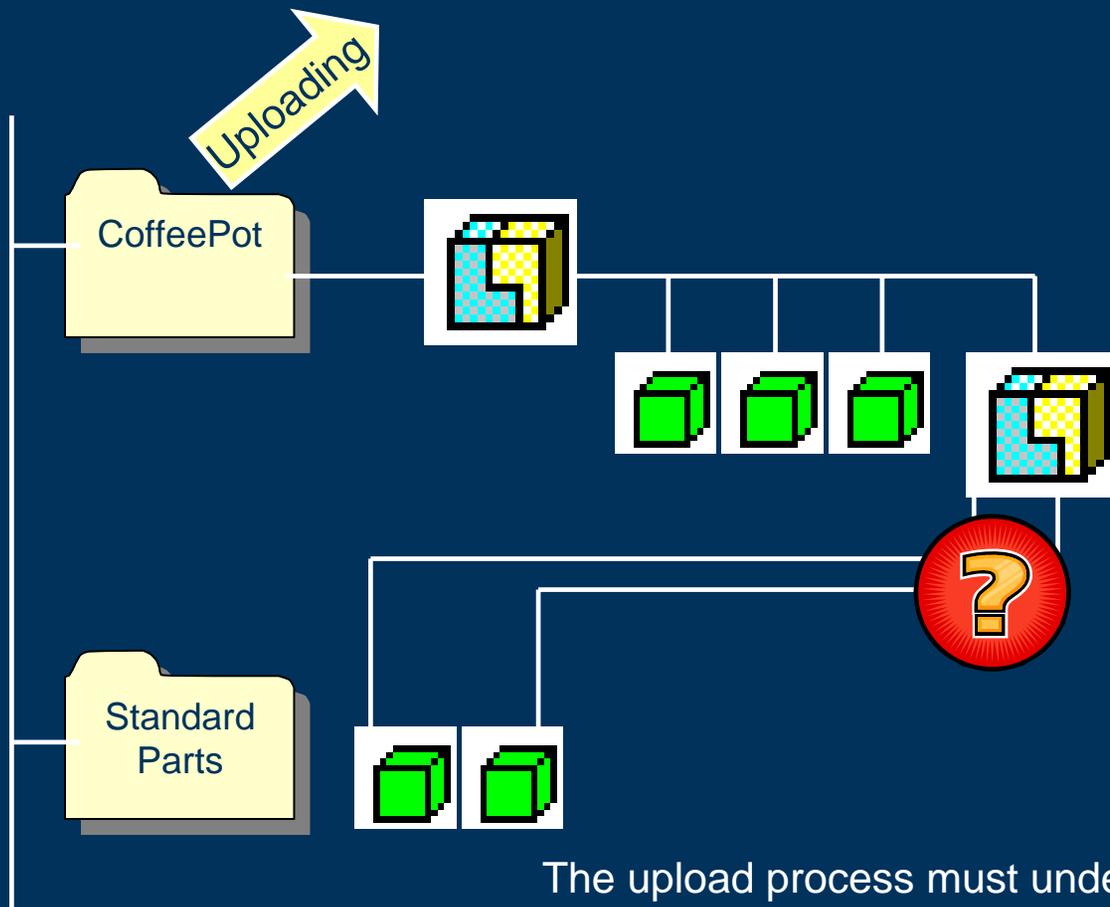




Managing Solid Edge Documents



- ▶ Folder Mapping – Consider the Following scenario:



The upload process must understand where everything is going BEFORE the uploading begins

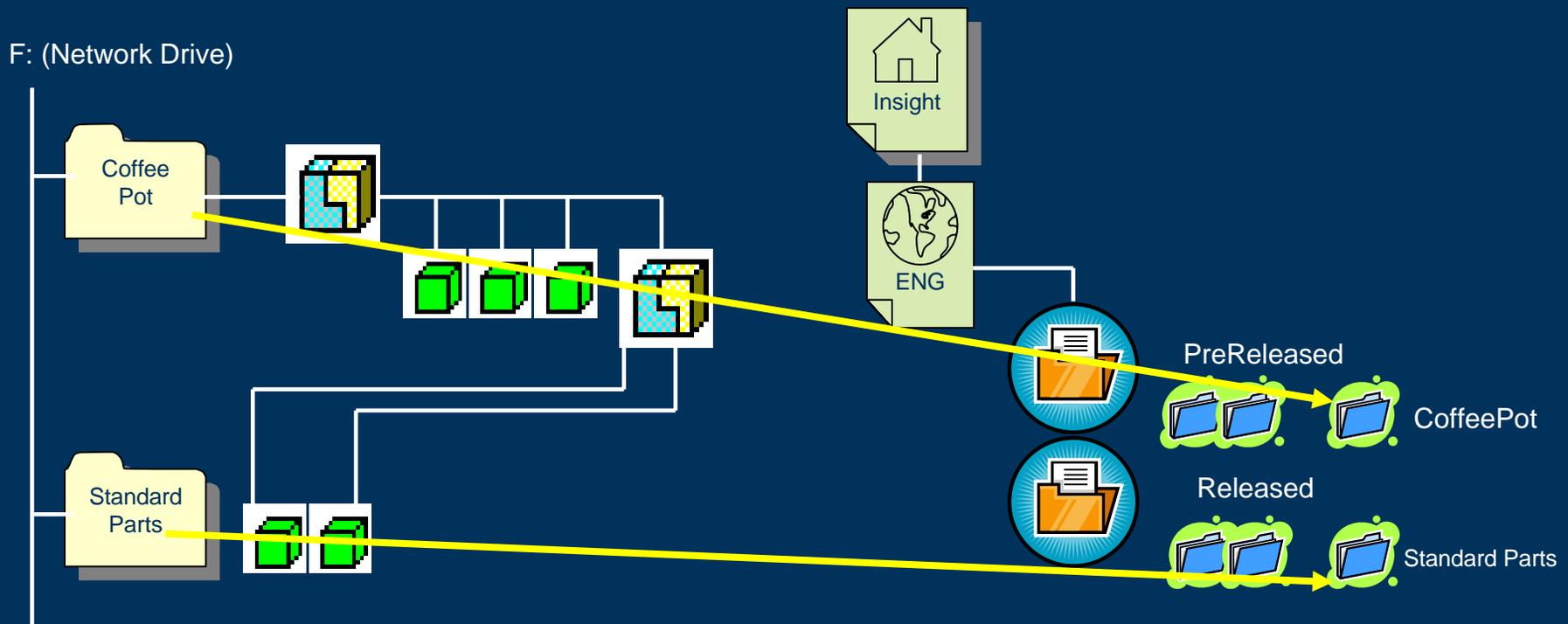


Managing Solid Edge Documents



- ▶ Using a folder mapping will tell Insight Connect where higher level documents should be placed:

Source:F:\Standard Parts Destination:<http://Insight/ENG/Released/Standard Parts>

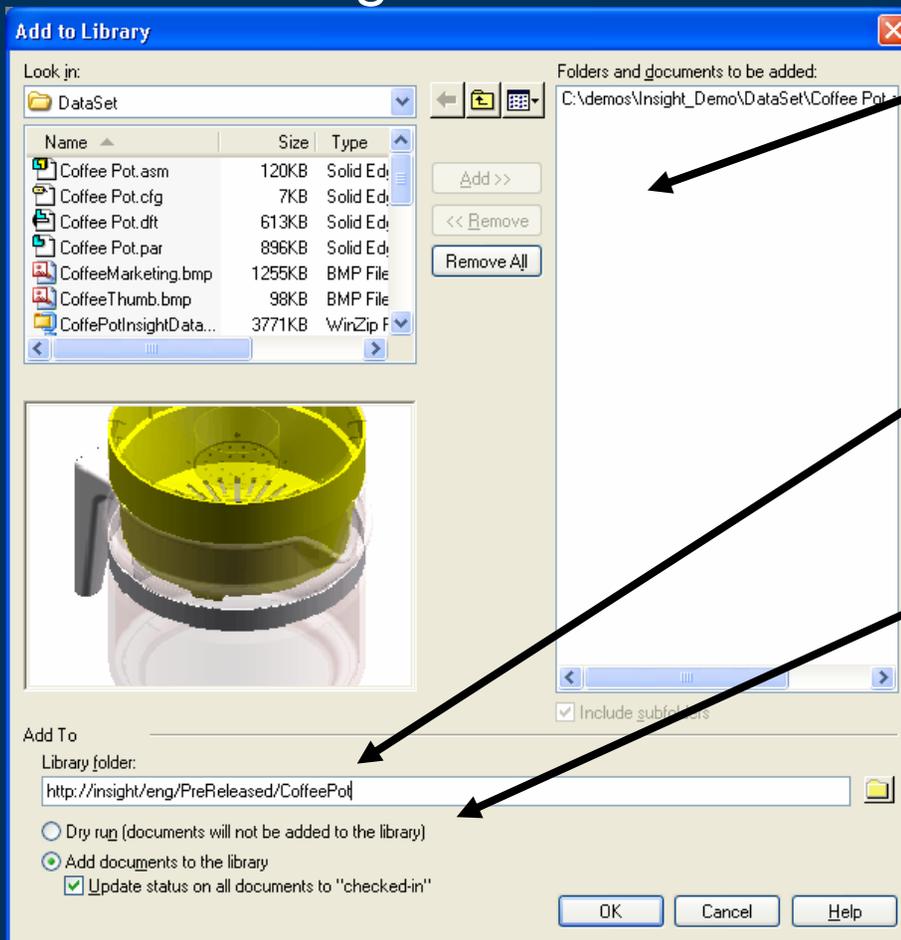




Managing Solid Edge Documents



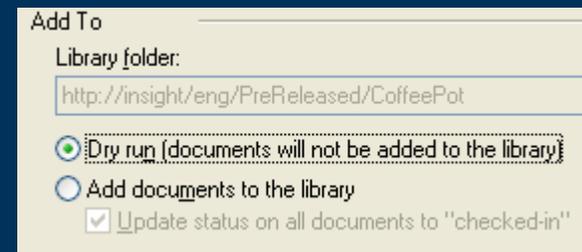
- ▶ Add to Library is found in Insight Connect under the “Manage” Pulldown.



Add Files and Folders to upload Here

Set the target destination Here

Optionally, you can “Dry Run” an upload
To test your dataset being uploaded to
Validate the process





Managing Solid Edge Documents



▶ Using the Sharepoint Dashboard with Solid Edge

▶ Opening Files

▶ Searching

▶ Opening files

▶ Where Used

▶ Revise

▶ View

Home - Solid Edge - Microsoft Internet Explorer

Address: http://insight/eng/default.aspx?CalendarDate=2005-09-21&CalendarPeriod=month&View={80F88627-A2F0-4AC6-BA4A-34D375CCA323}

Engineering Site SOLID EDGE

Engineering Sub Site

Solid Edge Search

Announcements

There are currently no active announcements. To add a new announcement, click "Add new announcement" below.

Events

September 2005

Sun	Mon	Tue	Wed	Thur	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Quick Launch

- Documents
 - PreReleased
 - Released
 - Markups
 - Obsolete
- Pictures
 - Marketing Pictures
- Lists
 - Contacts
 - Tasks
- Discussions
 - General Discussion
- Surveys

Site Navigator Web Part

- Team Web Site
 - Engineering Gateway
 - Procurement
 - Solid Edge

Tasks

Title Assigned To
Create ECO for engineer
Assembly to

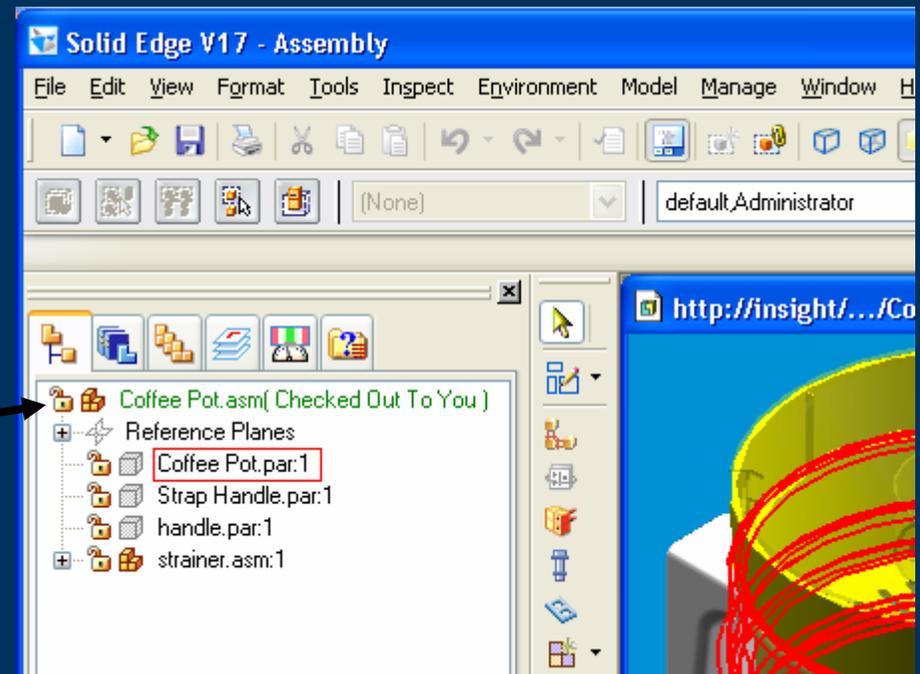
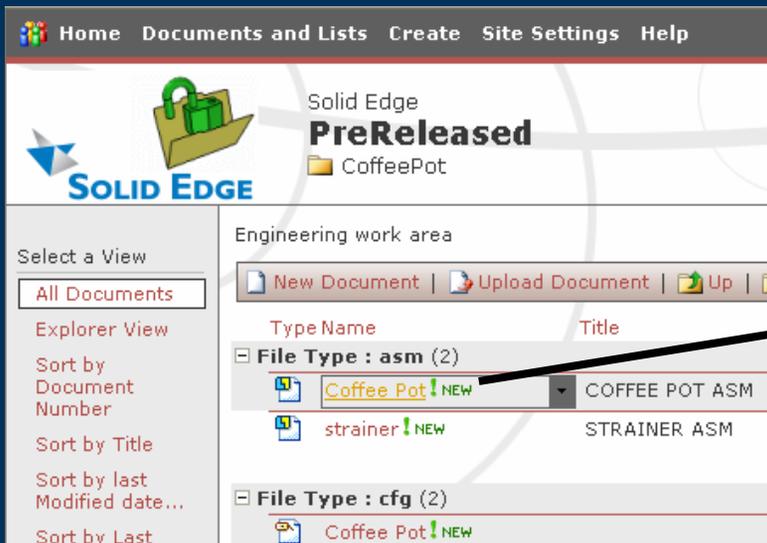
▶ Solid Edge Web Parts



Managing Solid Edge Documents



- ▶ Browsing the Document Libraries in the Sharepoint Dashboard, you can simply click on a Solid Edge document to open it.
- ▶ This is the same as opening from Edge, User security validation, caching, and checkout happens automatically.

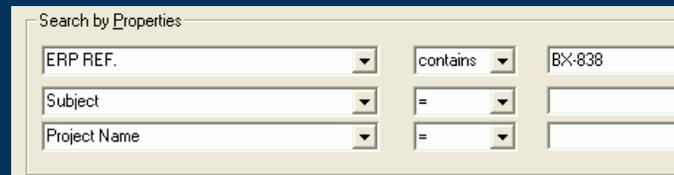
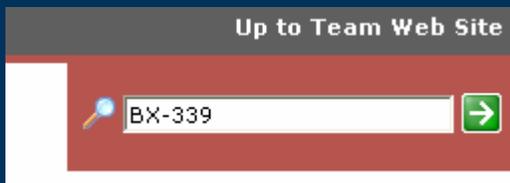




Managing Solid Edge Documents



- ▶ Searching from the Dashboard
 - ▶ There are two methods:
 - ▶ First is using the Sharepoint FullText search
 - ▶ This is only applicable to 1 Document Library at a time
 - ▶ Second is using the Solid Edge Search Web Part
 - ▶ This allows searching all Document Libraries in your SearchScope and provides multi-criteria searches.
 - ▶ This is consistent with the Solid Edge Search function

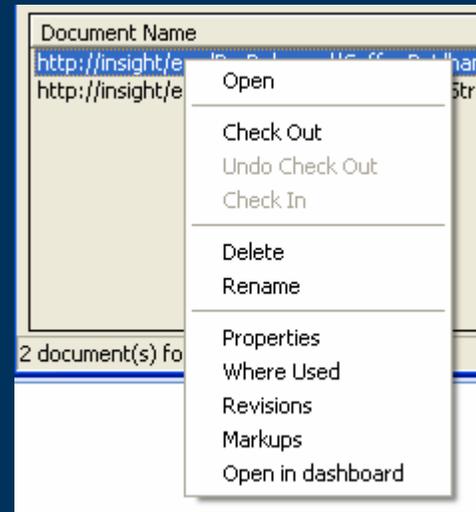




Managing Solid Edge Documents



- ▶ Using the Solid Edge Search, there are many actions possible for the resulting documents found:
 - ▶ Open
 - ▶ Check Out / Undo CheckOut/ Check In
 - ▶ Delete
 - ▶ Rename
 - ▶ Properties
 - ▶ Markups
 - ▶ Where Used
 - ▶ Revisions
 - ▶ Open In Dashboard





Managing Solid Edge Documents



- ▶ Where Used Report – Directly from Search!

Document Name	Creation ...	Last Sav...	Document Nu...	Revision ...	Proje...	SEStatus	Comments	Author
[-] handle.par	11/30/2...	9/19/20...	239920	0	COF...	Available	COMME...	petty
[+] Coffee Pot.asm	11/30/2...	9/19/20...	299382	0	COF...	Available	COMME...	petty
[+] handle.dft	9/19/20...	9/21/20...	239920	0		Available		Administratc

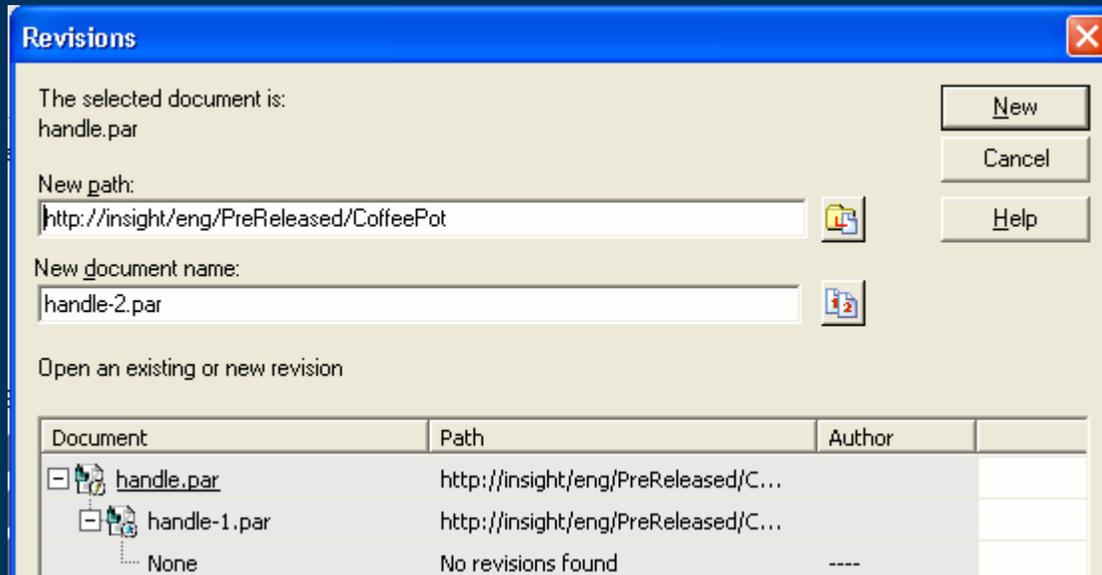
OK Cancel



Managing Solid Edge Documents



- ▶ Revisions – This will show the entire Revision History of a document as well as allow you to create a new Revision in context.
- ▶ Each item in the Revision History tree can run a Where Used, be opened, see a preview, etc.



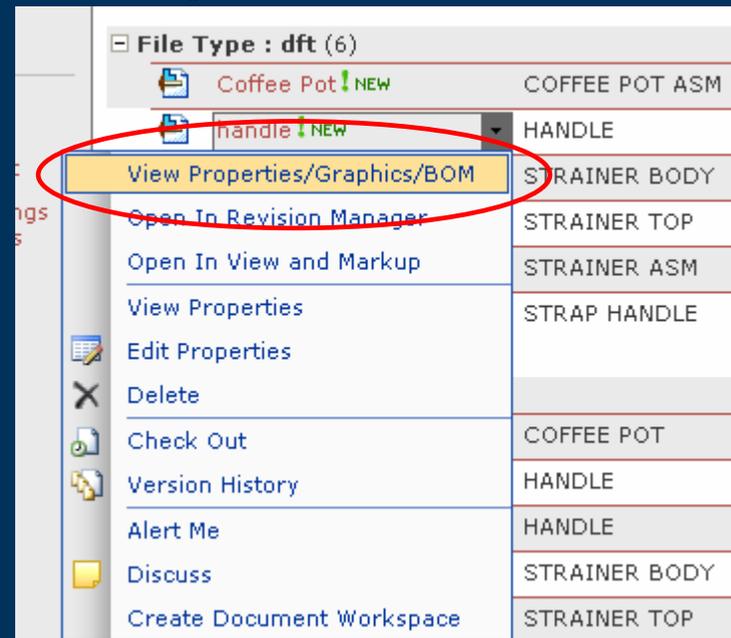
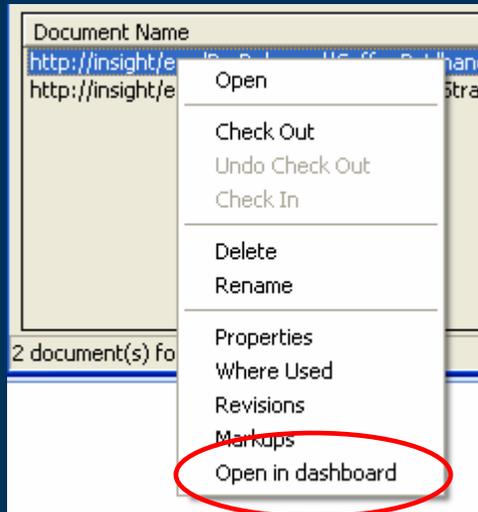


Managing Solid Edge Documents



▶ Open in Dashboard

- ▶ This option is available on the Solid Edge Search results as well as on the context menu of the file in a Document Library, the result is the same.
- ▶ This will show the Web Part Page with the selected document loaded.





Managing Solid Edge Documents



- ▶ The Three Solid Edge Web Parts:
 - ▶ Bill of Materials, Property, and Graphics Views

The screenshot displays the 'webparts' interface for a Solid Edge document. It is divided into three main sections:

- BOM View:** A table listing parts and their properties.
- Graphics View:** A 3D CAD model of a coffee pot.
- Property View:** A list of document and part properties.

Parts List	Quantity	SEStatus	SEStatusUser	Title	Document Number	Revision Number	Material	Stock Code	ERP REF.
coffee pot.asm	1	Available		COFFEE POT ASM	299382				BX-891
coffee pot.par	1	Available		COFFEE POT	388287	0	Glass, general industrial	SC12016	BX-853
strap handle.par	1	Available		STRAP HANDLE	399282	0	Steel	SC12046	BX-883
handle.par	1	Available		HANDLE	239920	0	ABS Plastic, medium impact	SC12001	BX-838
strainer.asm	1	Available		STRAINER ASM	223309	0			BX-890
strainer top.par	1	Available		STRAINER TOP	837723	0	ABS Plastic, high impact	SC12000	BX-837

Property	Value
Document Name	coffee pot.
Document Path	http://insig
Created	9/20/2005
Created By	INSIGHT\ad
Last Modified	9/20/2005
Last Modified By	INSIGHT\ad
Checked Out By	
Approval Status	Approved
Title	COFFEE POT
SEStatus	Available
SEStatusUser	
Document Number	299382
Revision Number	0
Material	

Bill of Materials View

Property View

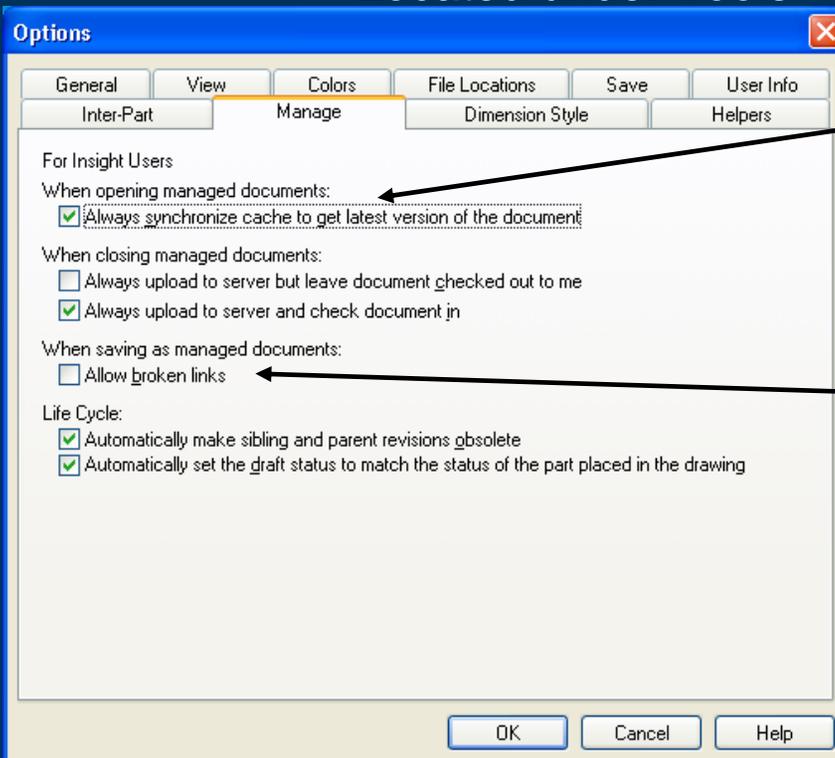
Graphics View



Managing Solid Edge Documents



- ▶ Management within the Solid Edge Environment
 - ▶ Client Side options
 - ▶ Insight Management options can be viewed and changed in Solid Edge or Insight Connect
 - ▶ Located under Tools->Options, “Manage” tab



!! Usually ensure that this is Checked !!

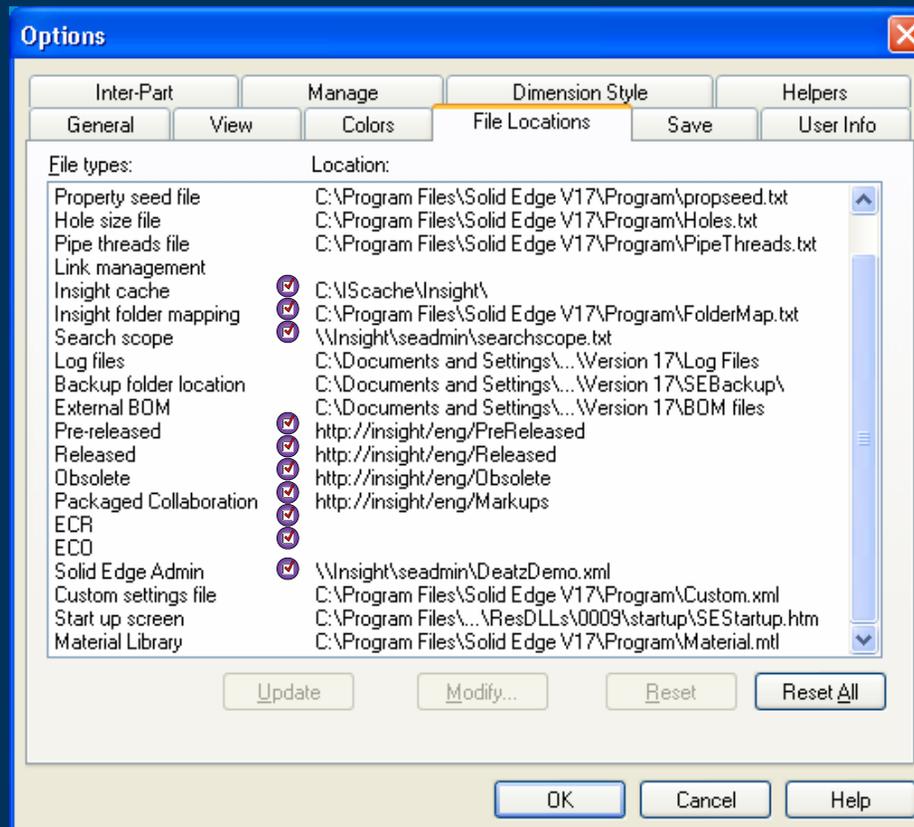
!! Usually ensure that this is UN-Checked !!



Managing Solid Edge Documents



- ▶ Also Located under the same Tools->Options dialog is the “File Locations” tab, which contains many Insight specific items.

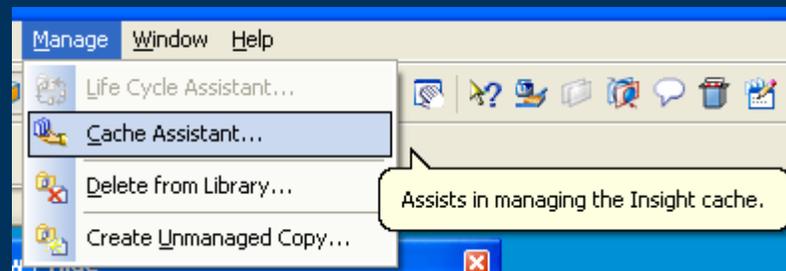




Managing Solid Edge Documents



- ▶ The Cache Assistant
 - ▶ Cache Assistant controls the local copies made when interacting with managed documents.
 - ▶ The Cache Assistant provides means to:
 - ▶ View, Synchronize, Check In or Out, or Download managed documents in Sharepoint.
 - ▶ Clear some or all of your local cache .
 - ▶ Set and configure Offline and Online modes of working.





Managing Solid Edge Documents



View Filter

Synchronize All

Check In All

Download

Delete Cache

On/Offline Settings

Cache Assistant

Show: All documents

Document	Folder	Size	Checked-Out	Up-To-Date
Coffee Pot.asm	insight\eng\PreReleased\CoffeePot	120.00KB	No	Yes
Coffee Pot.dft	insight\eng\PreReleased\CoffeePot	613.00KB	No	Yes
Coffee Pot.par	insight\eng\PreReleased\CoffeePot	896.50KB	No	Yes
CoffeePot.bmp	insight\eng\Marketing Pictures	1.13MB	Unknown	
CTRAN.dft	insight\eng\Released\symbols	149.50KB	No	Yes
Cylinder Body.asm	insight\engineering\doc_control\Release\UNIVERSAL AT...	180.50KB	No	Yes
Cylinder Rod.asm	insight\engineering\doc_control\Release\UNIVERSAL AT...	162.00KB	No	Yes
DIODE.dft	insight\eng\Released\symbols	149.50KB	No	Yes
Face Plate.par	saluda\mig\released\solidedge\pl7\0m	124.00KB	No	Yes
FUEHRUNGSST...	insight\engineering\doc_control\Release\UNIVERSAL AT...	279.00KB	No	Yes
FUSE.dft	insight\eng\Released\symbols	102.50KB	No	Yes

Properties:

Title: COFFEE POT ASM
Author: Administrator
Template: B-sample.dft
Document Number: 299382
Revision Number: 0
Application Name: Solid Edge
Date created: 9/20/2005 2:15 PM
Date last modified: 9/21/2005 6:03 AM
Last Author: Administrator
Saving Application: Solid Edge

Preview:

Properties

Preview

Close

Help



Managing Solid Edge Documents



- ▶ The Cache Manager is a separate application that is used to schedule events that you might do manually using the Cache Assistant.

Look In folder



Folders and Files to be downloaded



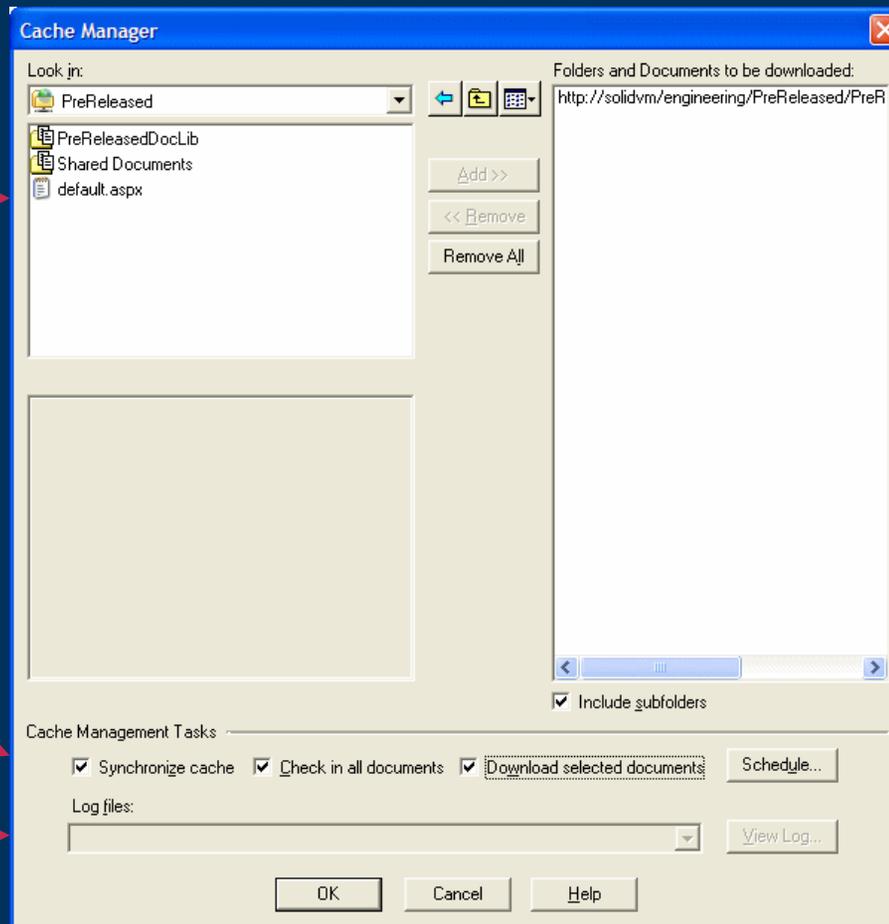
Tools



Log File



Schedule

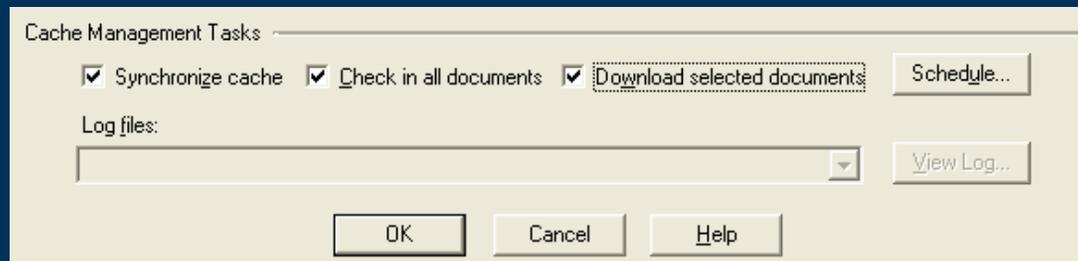




Managing Solid Edge Documents



- ▶ Cache Management Tools
 - ▶ Synchronize All - makes sure local cache is up-to-date with the server and if cleared, nothing happens
 - ▶ Check in All - gets the user's changes up to the server. This is an important step for those companies who like to do daily/weekly backups. This option will insure the latest files have been backed up.
 - ▶ Download selected documents – pulls the new files to cache. If this is done in off hours, file open does not have to perform this task which in turn makes it faster





Managing Solid Edge Documents



- ▶ If “Schedule” is selected, it will bring up the Username/Password dialog
- ▶ Once keyed in, the schedule dialog will appear as shown below

User Name and Password dialog box with fields for User name (mdthomps), Password, and Domain (PLM). Buttons for OK and Cancel are at the bottom.

CacheMgr.exe Task dialog box. Task: C:\WINDOWS\Tasks\CacheMgr.exe.job. Run: \Program Files\Solid Edge V17\Program\CacheMgr.exe. Start in: [empty]. Comments: [empty]. Run as: PLM\mdthomps. Set password... button. Run only if logged on: [unchecked]. Enabled (scheduled task runs at specified time): [checked].

CacheMgr.exe Schedule dialog box. Schedule Task: Daily. Start time: 9:00 AM. Advanced... button. Schedule Task Daily: Every 1 day(s). Show multiple schedules: [unchecked].

CacheMgr.exe Settings dialog box. Scheduled Task Completed: Delete the task if it is not scheduled to run again: [unchecked]. Stop the task if it runs for: 72 hour(s) 0 minute(s). Idle Time: Only start the task if the computer has been idle for at least: [empty] minute(s). If the computer has not been idle that long, retry for up to: [empty] minute(s). Stop the task if the computer ceases to be idle: [unchecked]. Power Management: Don't start the task if the computer is running on batteries: [unchecked]. Stop the task if battery mode begins: [unchecked]. Wake the computer to run this task: [unchecked].

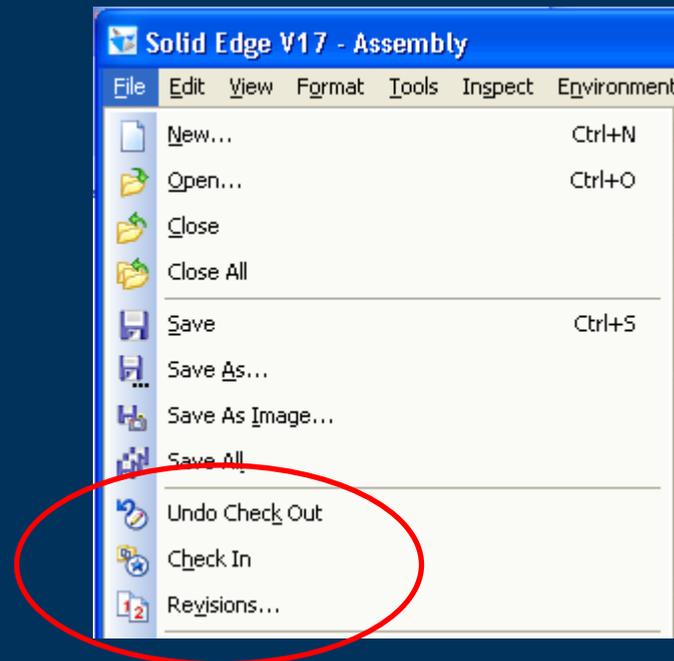




Managing Solid Edge Documents



- ▶ There are also many items in the normal working context of Solid Edge that pertain to Insight.
 - ▶ You will notice these items under the File Pulldown:
 - ▶ Undo Check Out
 - ▶ Check In
 - ▶ Revisions





Managing Solid Edge Documents



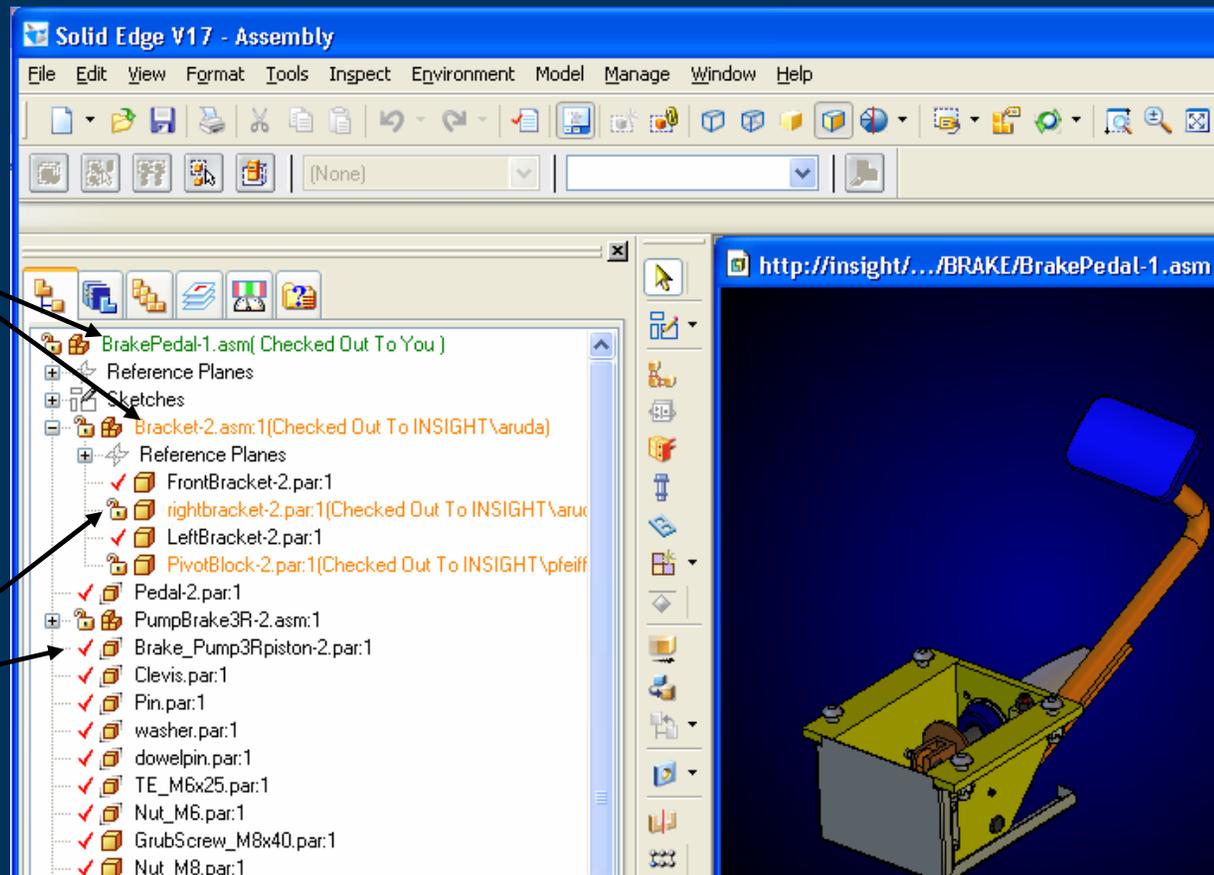
- ▶ You will also notice feedback in the Assembly Pathfinder that is helpful when working with managed documents.



Color Coded Identifiers
To determine who has an
Item checked out

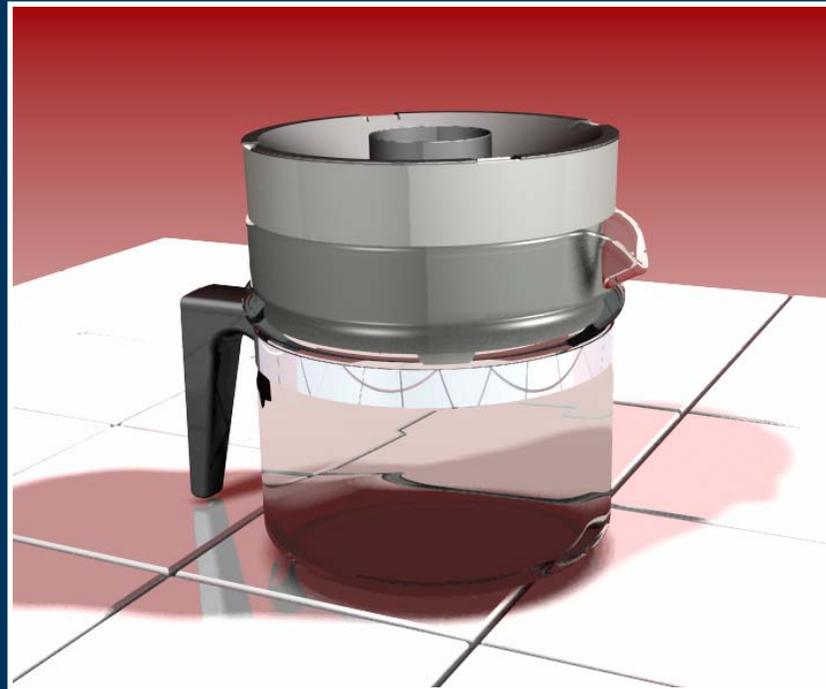
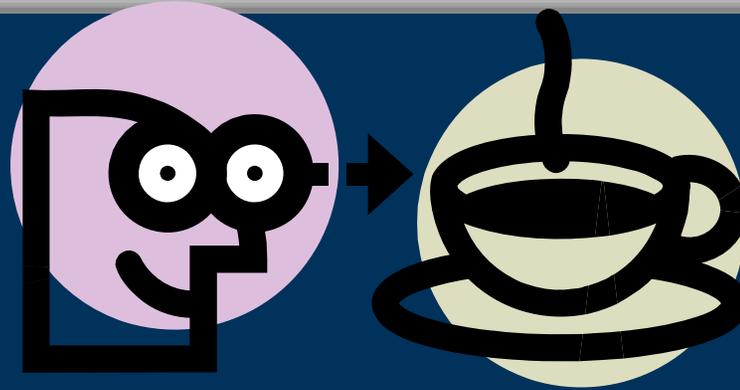
	Available
	In Work
	In Review
	Released
	Baselined
	Obsolete

Status Indicators





Break – CLM (Coffee Lifecycle Management)





Collaboration



Insight Connect : View and Markup

File View Tools Manage Window Help

Mem: 1.44M/300M 4.44MB (unique files)

Coffee Pot.pcf!Coffee Pot.dft

http://insight/eng/PreReleased/CoffeePot/Coffee Pot.asm

FILE	DATE	DESCRIPTION	BY	DATE	APP	REV
20057	09/21/05	Initial Release	Administrator	09/21/05	0100	1
20057	09/21/05	Initial Release	Administrator	09/21/05	0100	1
20057	09/21/05	Initial Release	Administrator	09/21/05	0100	1
20057	09/21/05	Initial Release	Administrator	09/21/05	0100	1

Current Document Tree

- http://insight/eng/PreReleased/CoffeePot/Coffee Pot.asm
 - http://insight/eng/PreReleased/CoffeePot/Coffee Pot.par
 - http://insight/eng/PreReleased/CoffeePot/Strap Handle.par
 - http://insight/eng/PreReleased/CoffeePot/handle.par
 - http://insight/eng/PreReleased/CoffeePot/strainer.asm
 - http://insight/eng/PreReleased/CoffeePot/Strainer Top.par
 - http://insight/eng/PreReleased/CoffeePot/Strainer Body...

Where Used

Edge Length: 0.45 in

Gap is too big, Having Leak issues
Part Name: Strainer Body.par_5

Created 9/21/2005 at 1:53:31 PM



Collaboration



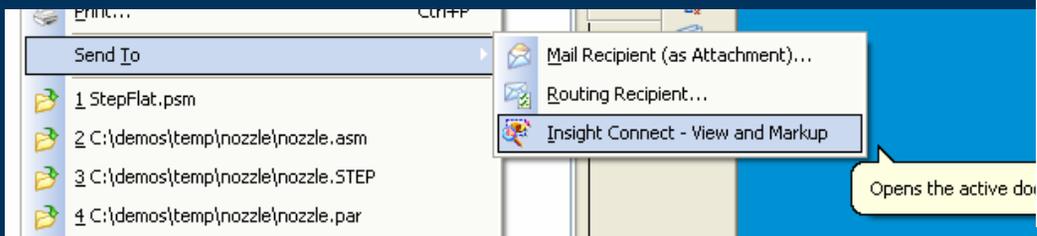
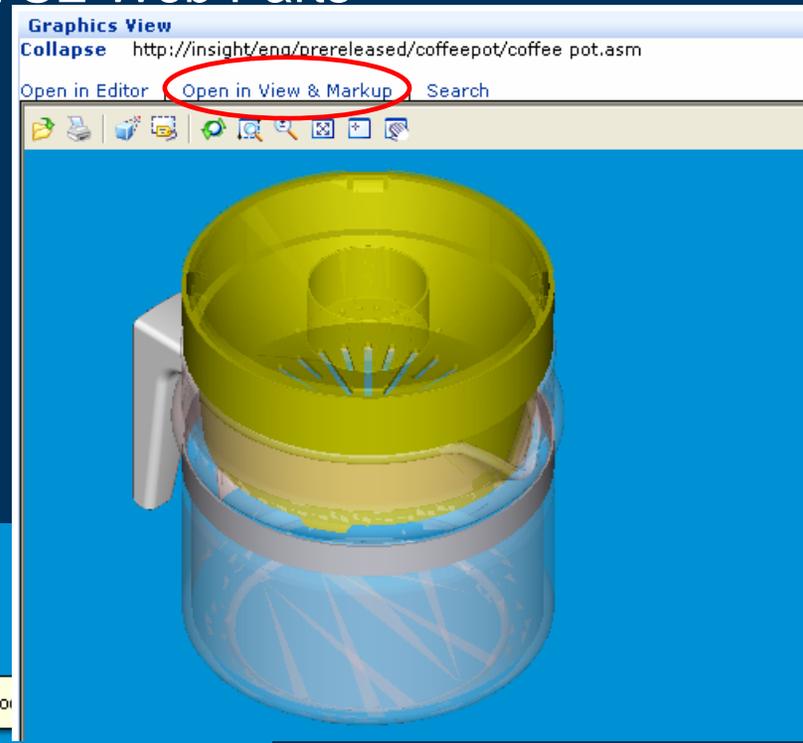
- ▶ Insight Connect / View and Markup is the toolset used to create collaboration documents known as PCF documents (Packaged Collaboration Files).
- ▶ PCF's can be used for different purposes:
 - ▶ To communicate design ideas during work in process or design phases.
 - ▶ To Redline a released item for an ECO/R
 - ▶ To create a "Package" of documents that relate to on another that ties all effected documents for workflow change (ie. An ECO that effects Edge documents as well as NX, Word, CAM, FEA, etc. documents)
 - ▶ To encapsulate the required actions for an ECO.



Collaboration



- ▶ There are a number of ways to start a PCF:
 - ▶ Open Insight Connect and start a new View and Markup document.
 - ▶ Use “Send to View and Markup” in Solid Edge.
 - ▶ Launch from the dashboard in SE Web Parts

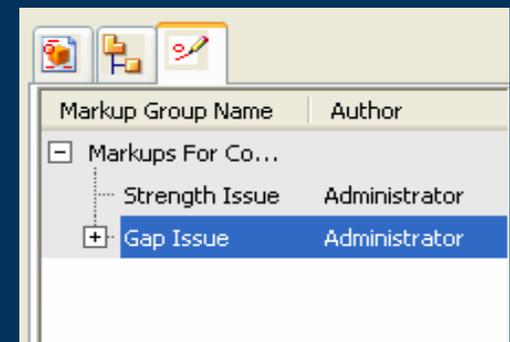
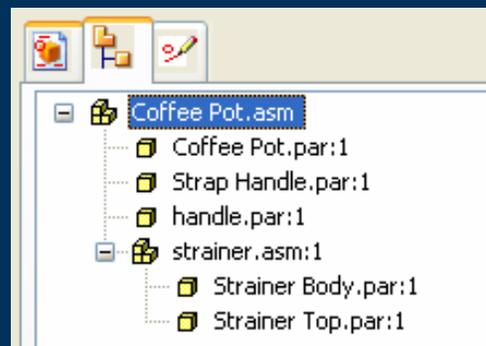
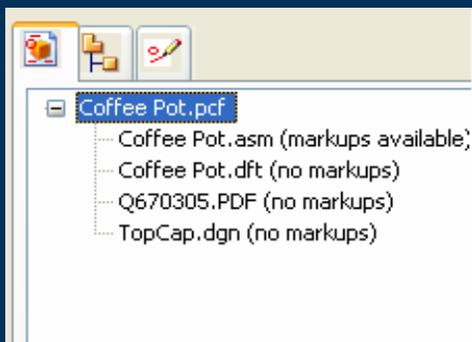




Collaboration



- ▶ When you are editing a PCF file, the Edgebar has 3 tabs:
 - ▶ Package List Tree – Lists all documents in this PCF
 - ▶ Assembly Pathfinder – Shows structure of current Item
 - ▶ Markup – Shows available redlines for current item

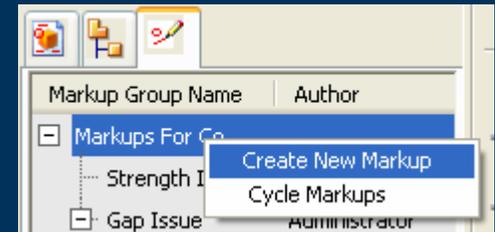




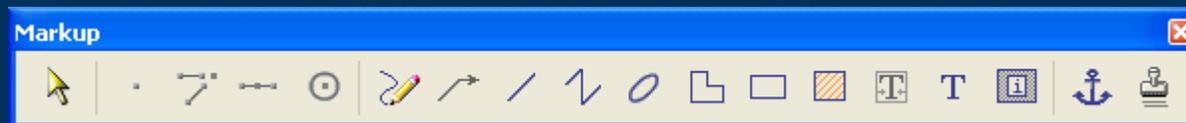
Collaboration



- ▶ To create a Markup for a document:
 - ▶ Make that document the current item
 - ▶ Switch to the Markup Tab
 - ▶ RMB click and select “Create New Markup”



- ▶ There are then many items you can add to convey items:





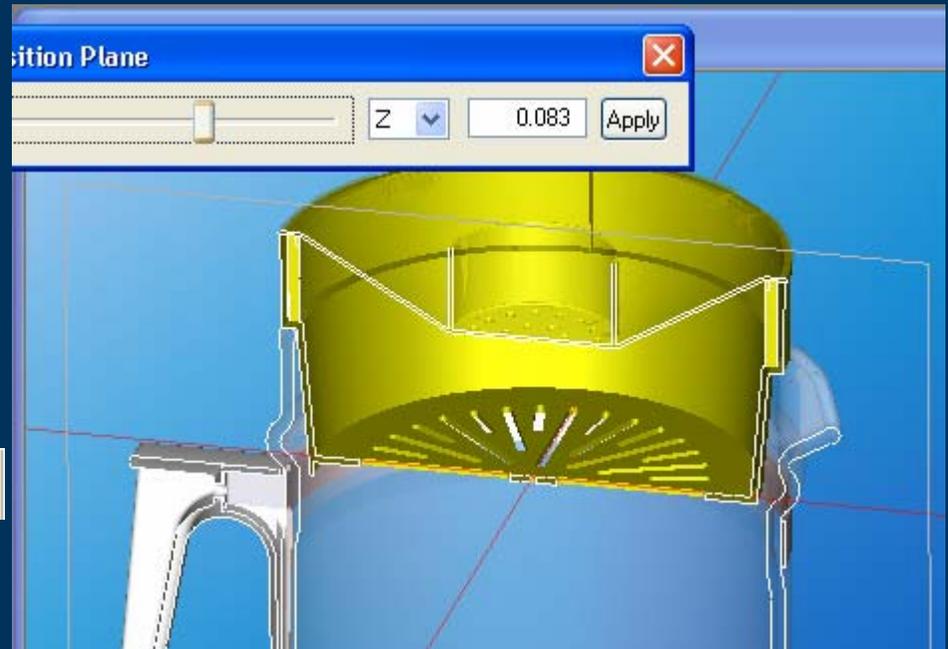
Collaboration



- ▶ You can also choose to create cross sections



- ▶ As well as take many kinds of measurements

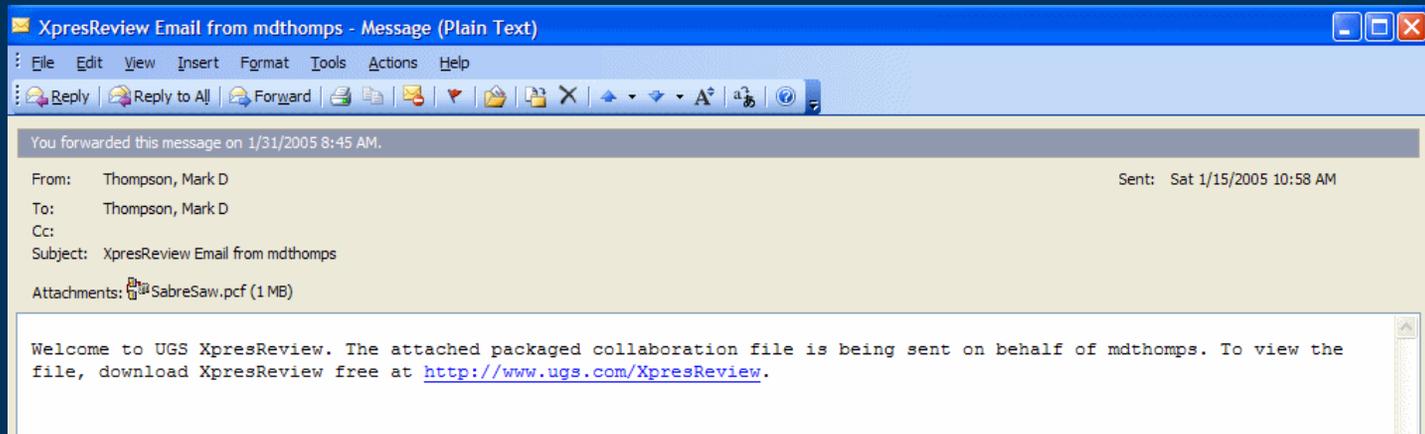




Collaboration



- ▶ When you complete a PCF, you have two options for alerting others to view your markups
 - ▶ By simply saving the markup to the “Markup” folder in Insight. (We will discuss how this “alerts” others later)
 - ▶ By choosing “Send to Mail Recipient”

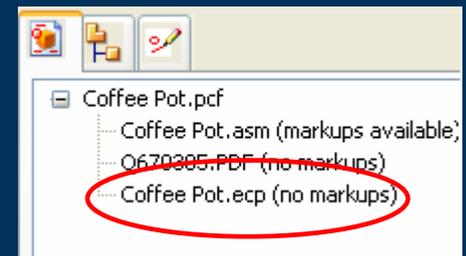
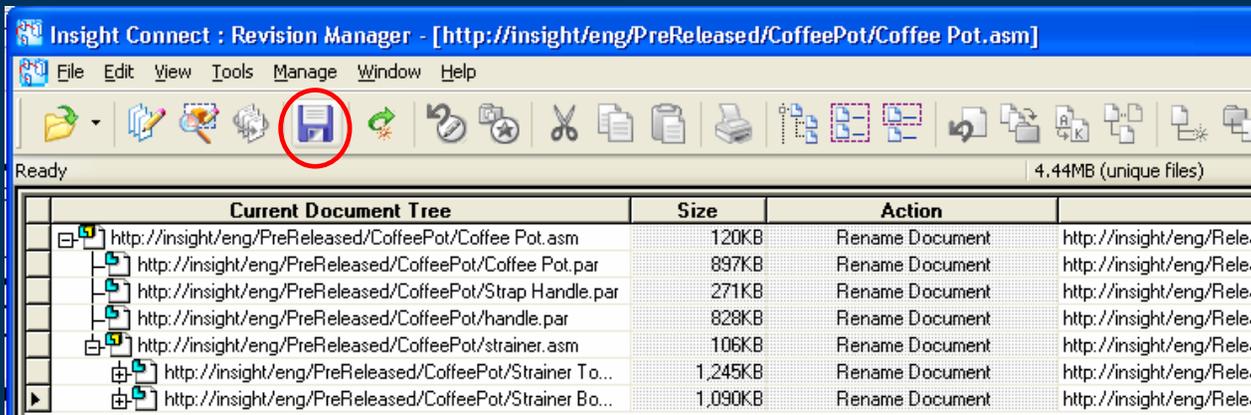




Collaboration



- ▶ You can also save “potential Actions” within a PCF file.
 - ▶ This is useful if you do not have rights to perform the actions yourself, ie., if you are replacing released documents in a Released Insight Document Library.
 - ▶ This is called an EnCapsulated Process that can be acted upon by a recipient with rights within Insight





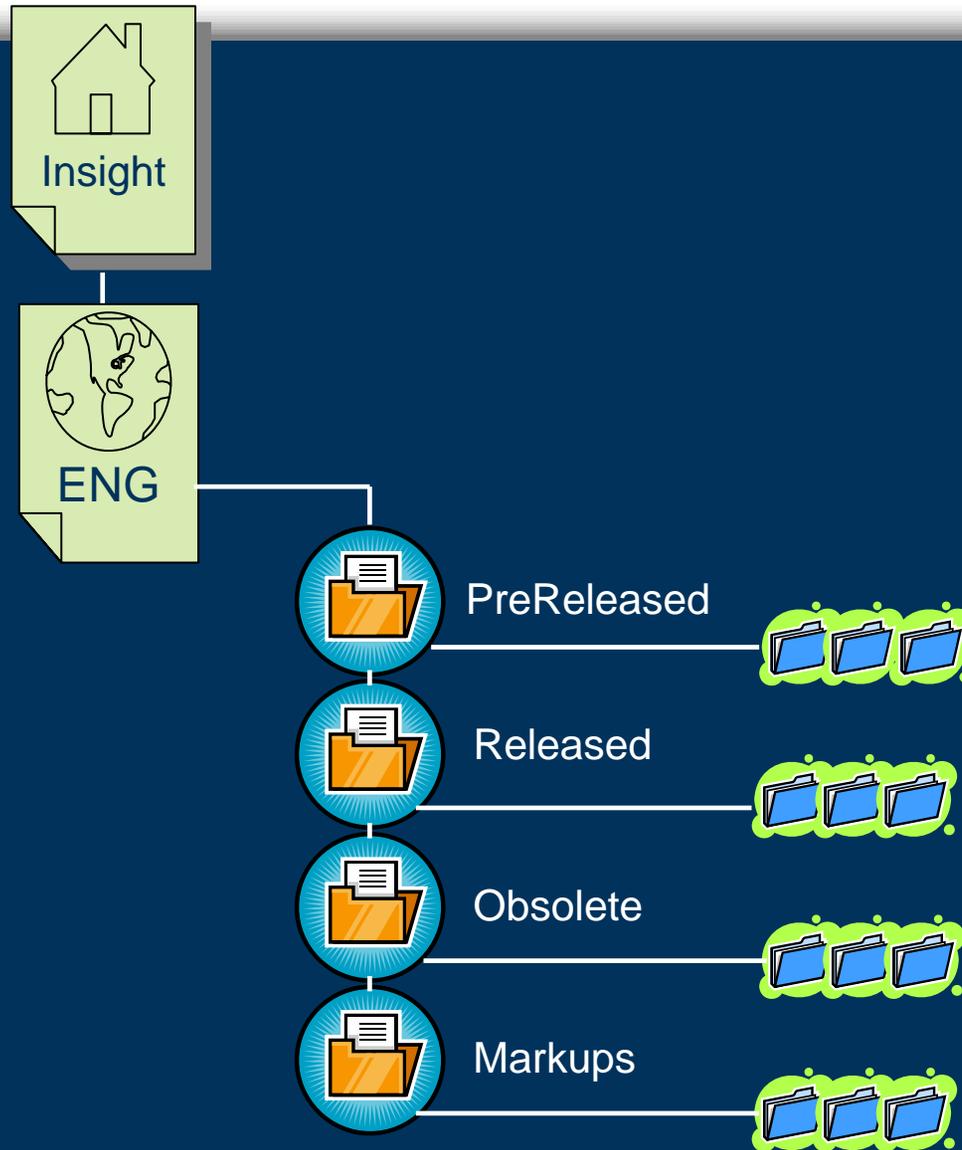
LifeCycle Assistant



- ▶ **LifeCycle Assistant** is a built in mechanism for facilitating standard workflow processes.
- ▶ To understand how a “standard” process maps to an Insight implementation, let’s review the structure of our “typical” Sharepoint implementation.

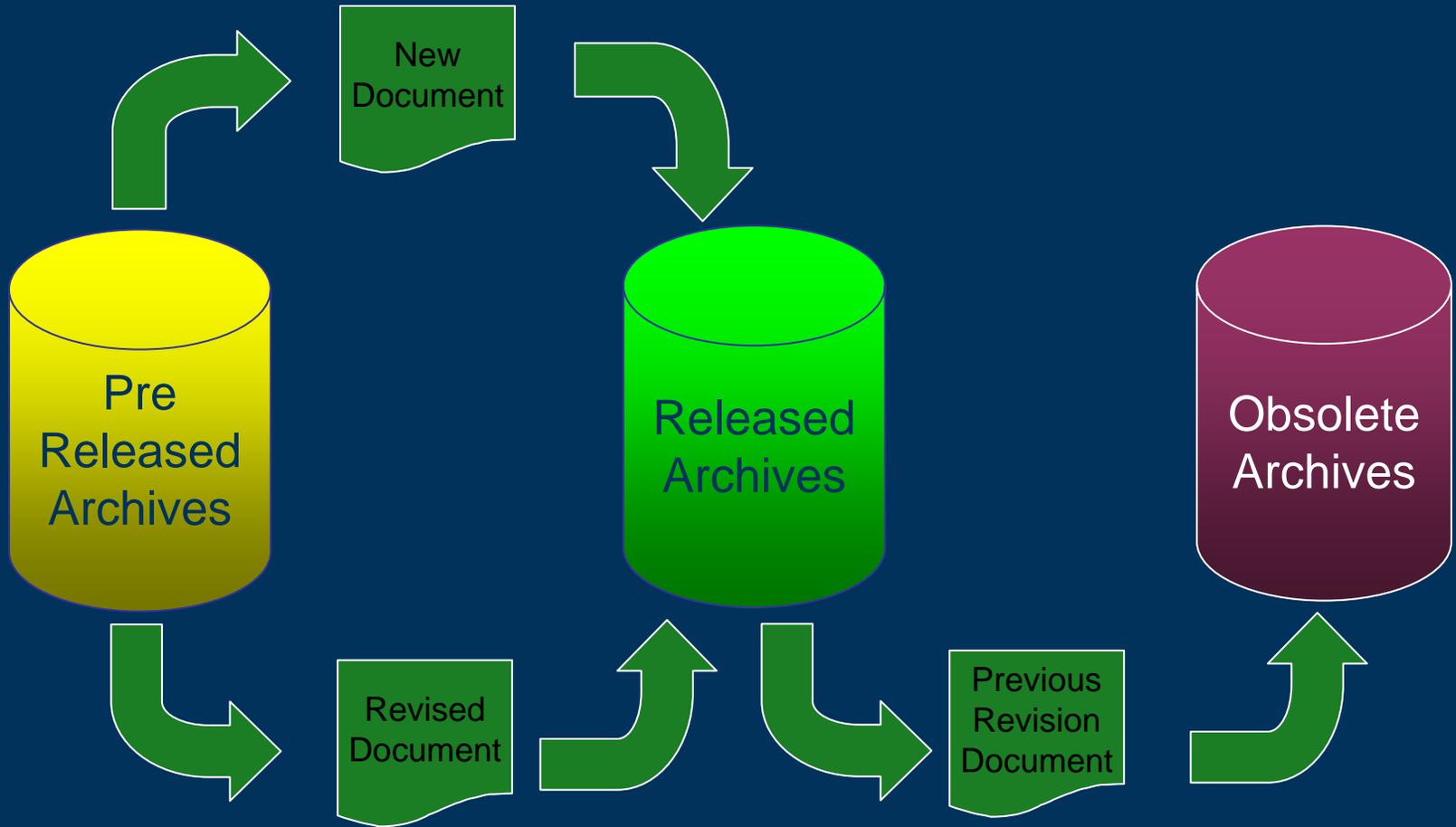


LifeCycle Assistant



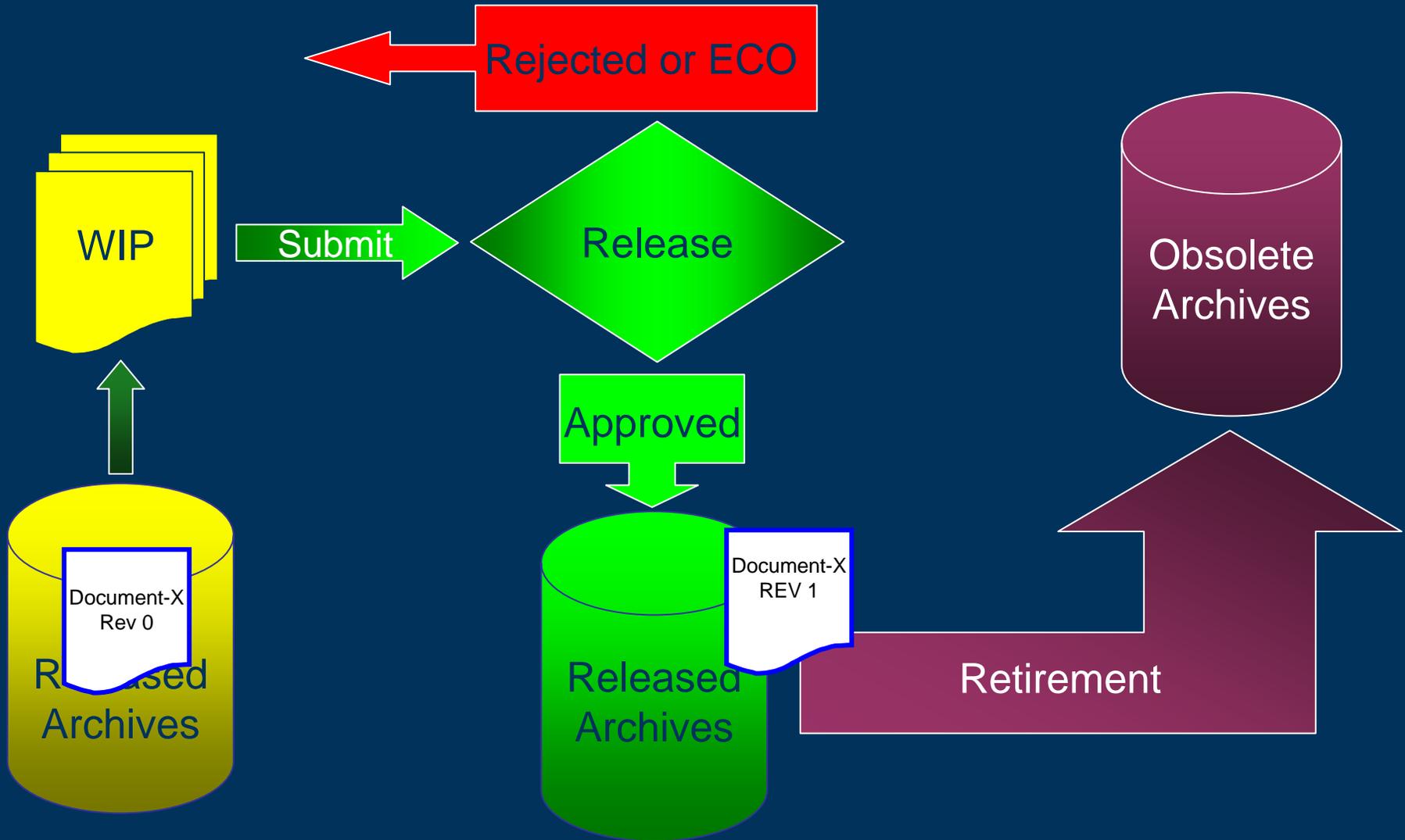


LifeCycle Assistant





LifeCycle Assistant





LifeCycle Assistant



PreReleased



- ▶ The PreReleased Document Library will have the following Characteristics (in a typical scenario):



- ▶ Security – Engineers, Engineering Managers, and Change Control Officers will have full permissions. No one else will have even Read rights.



- ▶ **Properties** - All properties will be optional (but available).



- ▶ Versions - Versions turned on



- ▶ **Alerts** - No Special Alerts



- ▶ Approvals - Approvals Off





LifeCycle Assistant



Released



- ▶ The Released Document Library will have the following Characteristics (in a typical scenario):



- ▶ Security – Everyone (*) has Read only permissions Except the Change Control Officers who have admin rights.



- ▶ Properties - Most properties will be Mandatory



- ▶ Versions - Versions turned off



- ▶ Alerts - Possibly CAM engineers, Shop Floor, etc.



- ▶ Approvals - Approvals Off





LifeCycle Assistant



Obsolete



- ▶ The Obsolete Document Library will have the following Characteristics (in a typical scenario):



- ▶ Security – Engineering has Read only permissions
Change Control Officers have admin rights



- ▶ Properties - Most properties will be Mandatory



- ▶ Versions - Versions turned off



- ▶ Alerts - Possibly Resource Planners



- ▶ Approvals - Approvals Off



LifeCycle Assistant



Markup



- ▶ The Markup Document Library will have the following Characteristics (in a typical scenario):



- ▶ Security – Engineering / Managers have contributor permissions Change Control Officers have admin rights



- ▶ Properties - Most properties will be Mandatory



- ▶ Versions - Versions turned on



- ▶ Alerts – Change Control Officers, Managers, Misc by Folders

- ▶ Approvals - Approvals on



LifeCycle Assistant



- ▶ Using LifeCycle Assistant to Release Documents

Insight Connect : Revision Manager - [http://insight/eng/PreReleased/CoffeePot/strainer.dft]

File Edit View Tools Manage Window Help

Ready 2.42MB (unique files)

Current Document Tree		Size	Action
[-]	http://insight/eng/PreReleased/CoffeePot/strainer.dft	331KB	Unchanged
[+]	http://insight/eng/PreReleased/CoffeePot/strainer.asm	107KB	Unchanged
	http://insight/eng/PreReleased/CoffeePot/Strainer Body.par	946KB	Unchanged
	http://insight/eng/PreReleased/CoffeePot/Strainer Top.par	1,105KB	Unchanged



LifeCycle Assistant



- ▶ Step 1 – Set the top level document status to Released
 - ▶ This will set the constituent documents to released if “Apply Status to linked Document” option is checked.

Life Cycle Assistant - Step1

No levels BOM view Apply Status to Linked Documents

Document Name	SEStatus	Folder	Docume...	Revision ...
strainer.dft	Available	http://insight/eng/PreReleased/CoffeePot	223309	0
strainer.asm	Available	http://insight/eng/PreReleased/CoffeePot	223309	0
Strainer Body.par	In Work	http://insight/eng/PreReleased/CoffeePot	328832	0
Strainer Top.par	In Review	http://insight/eng/PreReleased/CoffeePot	837723	0
	Released			
	Baselined			
	Obsolete			

Modify the status and folder for documents you want to move through the life cycle and select Next

Help Cancel < Back Next > Finish



LifeCycle Assistant



- ▶ Step 2 – LCA will automatically find the related draft documents for items being released and offer that these should be released as well.

Life Cycle Assistant - Step2

Document Name SEStatus Folder Docume... Revision ...

[-] Strainer Body.par	Released	http://insight/eng/Released/CoffeePot	328832	0	
[-] Strainer Body.dft	Released	http://insight/eng/Released/CoffeePot			
[-] Strainer Top.par	Released	http://insight/eng/Released/CoffeePot	837723	0	
[-] Strainer Top.dft	Released	http://insight/eng/Released/CoffeePot			
[-] strainer.asm	Released	http://insight/eng/Released/CoffeePot	223309	0	
[-] strainer.dft	Released	http://insight/eng/Released/CoffeePot	223309	0	

Modify the status and folder for draft documents that have links moving through the life cycle and then select Next. Select Back to go back and modify the status of additional documents

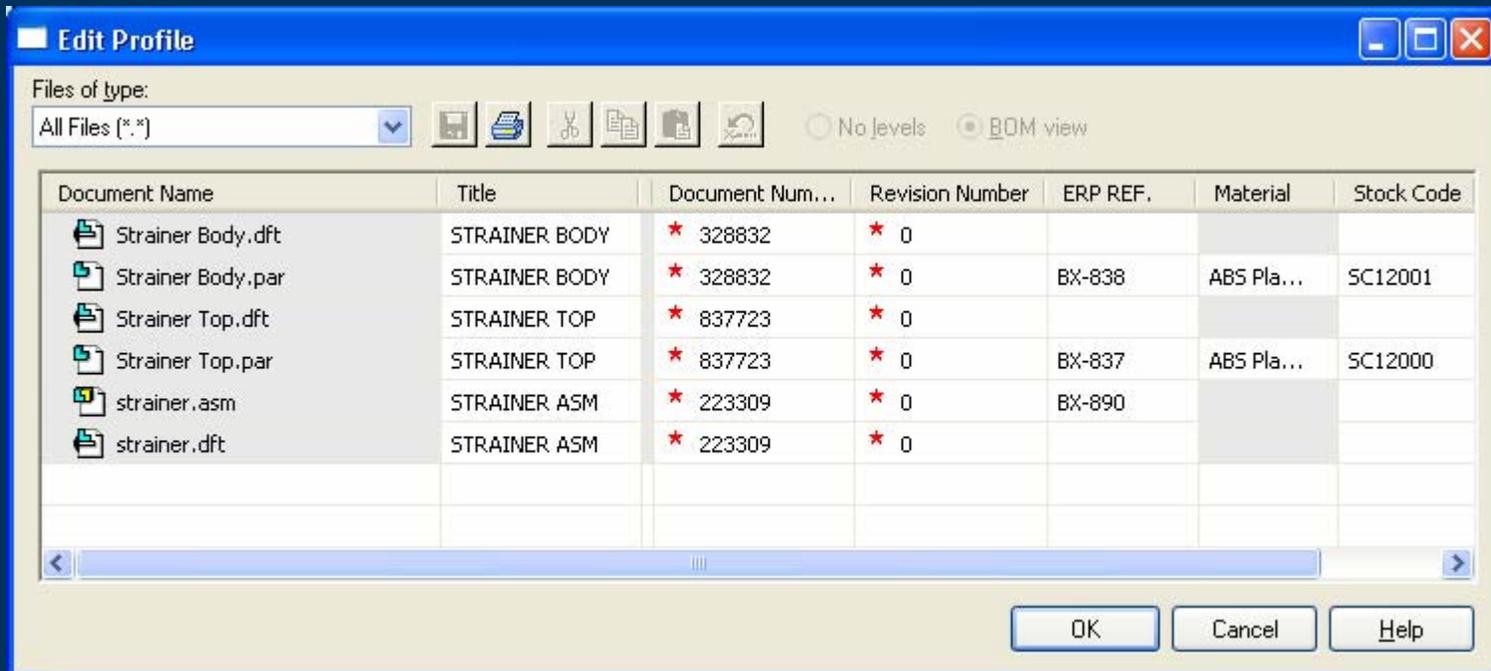
Help Cancel < Back Next > Finish



LifeCycle Assistant



- ▶ Finished – The tasks will process, and then prompt you for the now mandatory properties for Released Documents.

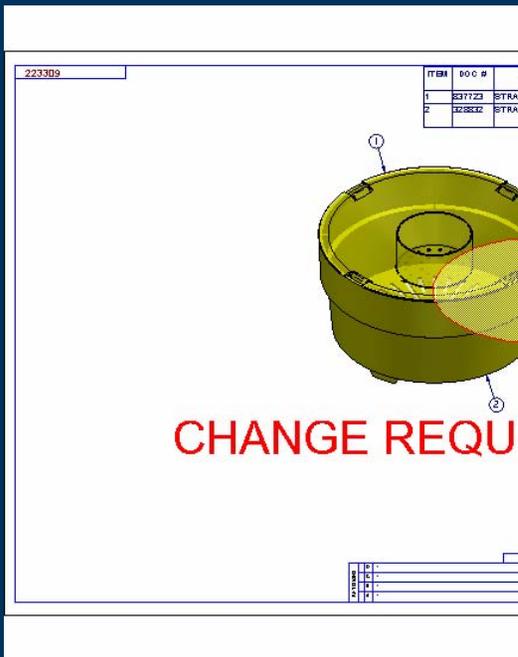




LifeCycle Assistant



- ▶ Revising - Create an ECR – Using Insight Connect, create a PCF to request a Change Request.
 - ▶ We will also create the Actions for this and save it with the PCF.



Insight Connect : Revision Manager - [http://insight/eng/Released/CoffeePot/strainer.dft]

File Edit View Tools Manage Window Help

Ready OKB (unique files)

Current Document Tree		Size	Action	New Filename
http://insight/eng/Released/CoffeePot/strainer.dft		379KB	Revise	http://insight/eng/PreReleased/CoffeePot/strainer-1.dft
http://insight/eng/Released/CoffeePot/strainer.asm		154KB	Revise	http://insight/eng/PreReleased/CoffeePot/strainer-1.asm
http://insight/eng/Released/CoffeePot/Strainer Body.par		996KB	Revise	http://insight/eng/PreReleased/CoffeePot/Strainer Body-1.par
http://insight/eng/Released/CoffeePot/Strainer Top.par		1,156KB	Revise	http://insight/eng/PreReleased/CoffeePot/Strainer Top-1.par

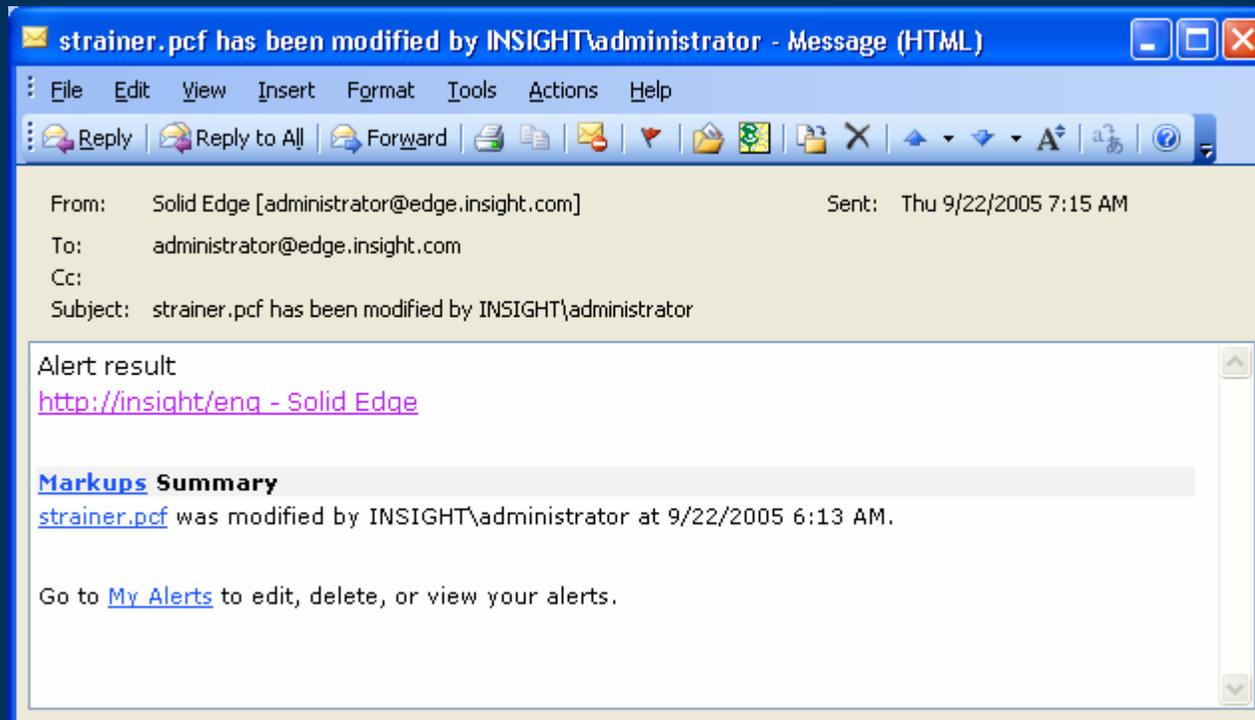
Where Used		Size	Action	New Filename	
http://insight/eng/Released/CoffeePot/Strainer Top.par		1,156KB	Revise	http://insight/eng/PreReleased/CoffeePot/Strainer Top-1.par	837
http://insight/eng/Released/CoffeePot/Strainer Top.dft		402KB	Revise	http://insight/eng/PreReleased/CoffeePot/Strainer Top-1.dft	837
http://insight/eng/Released/CoffeePot/strainer.asm		154KB	Revise	http://insight/eng/PreReleased/CoffeePot/strainer-1.asm	223
http://insight/eng/Released/CoffeePot/Strainer Body.par		996KB	Revise	http://insight/eng/PreReleased/CoffeePot/Strainer Body-1.par	328
http://insight/eng/Released/CoffeePot/Strainer Body.dft		351KB	Revise	http://insight/eng/PreReleased/CoffeePot/Strainer Body-1.dft	328
http://insight/eng/Released/CoffeePot/strainer.asm		154KB	Revise	http://insight/eng/PreReleased/CoffeePot/strainer-1.asm	223



LifeCycle Assistant



- ▶ Alerts are sent to notify appropriate parties that a Change has been requested

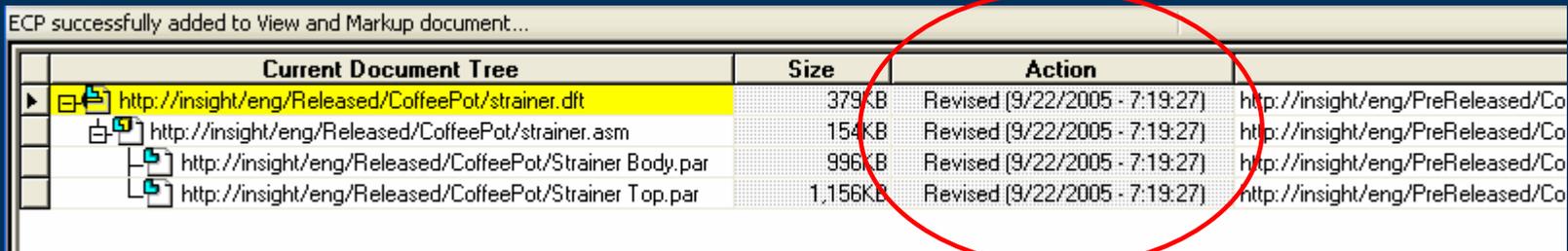
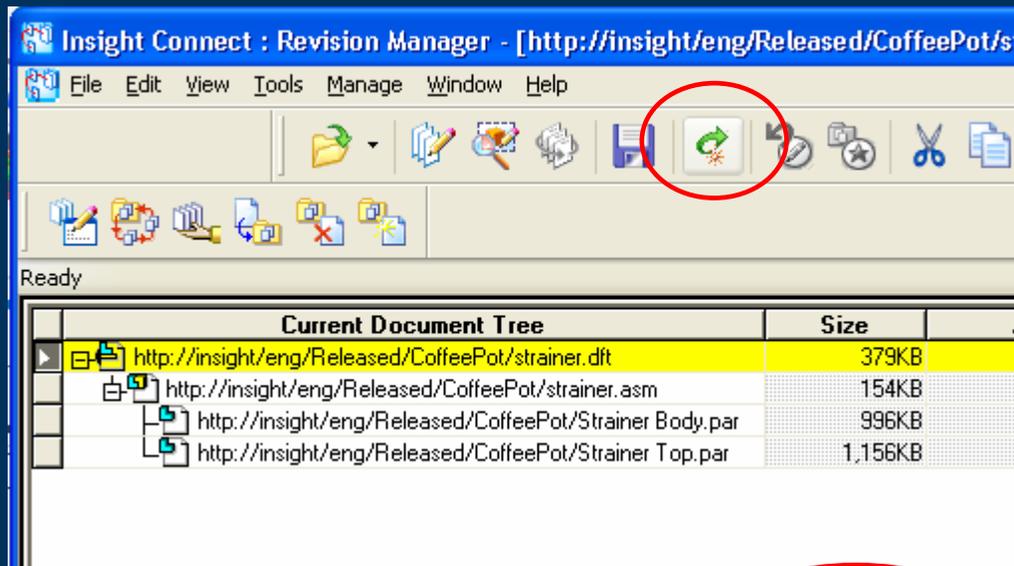




LifeCycle Assistant



- ▶ The Change Control Officer opens the PCF, reviews and performs the saved actions.
- ▶ Time/Actions Performed stamps are recorded and saved in the PCF
- ▶ Process Complete





LifeCycle Assistant



- ▶ Releasing a new Revision of an existing item
 - ▶ This is the same process as the initial release Except...

Life Cycle Assistant - Step1

Document Name | SEStatus | Folder | Docume... | Revision ...

strainer.dft	Available	http://insight/eng/PreReleased/CoffeePot	223309	0
strainer.asm	Available	http://insight/eng/PreReleased/CoffeePot	223309	0
Strainer Body.par	In Work	http://insight/eng/PreReleased/CoffeePot	328832	0
Strainer Top.par	In Review	http://insight/eng/PreReleased/CoffeePot	837723	0
	Released			
	Baselined			

Life Cycle Assistant - Step2

Modify the status and folder for draft documents through the life cycle editor.

Document Name | SEStatus | Folder | Docume... | Revision ...

Strainer Body.par				
Strainer Body.dft				
Strainer Top.par				
Strainer Top.dft				
strainer.asm				
strainer.dft				

Modify the status and folder for draft documents through the life cycle editor and then select Next to go back and modify additional documents

Life Cycle Assistant - Step3

Document Name | SEStatus | Folder | Docume... | Revision ...

Strainer Body-1.dft	Released	http://insight/eng/Released/CoffeePot	328832	1
Strainer Body.dft	Obsolete	http://insight/eng/Obsolete/CoffeePot	328832	0
Strainer Body-1.par	Released	http://insight/eng/Released/CoffeePot	328832	1
Strainer Body.par	Obsolete	http://insight/eng/Obsolete/CoffeePot	328832	0
Strainer Top-1.dft	Released	http://insight/eng/Released/CoffeePot	837723	1
Strainer Top.dft	Obsolete	http://insight/eng/Obsolete/CoffeePot	837723	0

Decide which old revisions to make Obsolete and select Next to continue. Select Back to go back and change the status of additional Draft documents

Help | Cancel | < Back | Next > | Finish



LifeCycle Assistant



- ▶ The older previously Released documents are automatically moved to Obsolete

Life Cycle Assistant - Step3

Save, Print, Copy, Paste, Refresh, Undo

Document Name	SEStatus	Folder	Docume...	Revision ...
Strainer Body-1.dft	Released	http://insight/eng/Released/CoffeePot	328832	1
Strainer Body.dft	Obsolete	http://insight/eng/Obsolete/CoffeePot	328832	0
Strainer Body-1.par	Released	http://insight/eng/Released/CoffeePot	328832	1
Strainer Body.par	Obsolete	http://insight/eng/Obsolete/CoffeePot	328832	0
Strainer Top-1.dft	Released	http://insight/eng/Released/CoffeePot	837723	1
Strainer Top.dft	Obsolete	http://insight/eng/Obsolete/CoffeePot	837723	0

Decide which old revisions to make Obsolete and select Next to continue. Select Back to go back and change the status of additional Draft documents

Help Cancel < Back Next > Finish



LifeCycle Assistant



Review of the complete process

