

# *xLM SMARTTEAM Newsletter*



YOUR CHALLENGES | OUR SOLUTIONS

## *Inside this Issue:*

About Us .....	2
What is New at xLM .....	2
SMARTTEAM Tools.....	3
SMARTTEAM Tips You've Been Looking For.....	4
SMARTTEAM Release Info .....	6
PLM – xLM Consulting Perspective .....	7
Communication & Feedback.....	8

## *About Us*

---

A warm welcome to our readers. To those of you who do not know us let me introduce xLM Solutions.

xLM Solutions is a team of experienced software consulting and system integration professionals with specialized knowledge of product lifecycle management (PLM), Internet and Microsoft technologies and other enterprise software solutions. xLM provides end-to-end PLM services, including requirements analysis, installation, configuration, customization, support and maintenance. Our specialized knowledge of PLM systems ensure our clients' needs are properly and efficiently met.

Our clients include a variety of different organizations across a wide range of industries that have in common one major need: To manage effectively and efficiently proprietary, classified or otherwise sensitive information. These types of data may include engineering/manufacturing product specifications, medical records and municipal records.

xLM Solutions provides its clients with tools and capabilities for successful information systems management.

## *What is New at xLM*

---

### **SmarTeam Certification**

SmarTeam/Dassault has developed a new certification exam to certify application engineers on SmarTeam Design Express implementation. We are proud to say that members of xLM have already taken this exam and passed with flying colors. ....Not that we felt we needed any outside validation regarding our SmarTeam abilities.....

### **SmarTeam Support**

**We were surprised to learn that some of our customers for whom we provide complex solutions were unaware of our support service offerings. Indeed,** one of the areas where xLM is providing great value to customers is in xLM's support services. xLM support can cover any type of question/issue regarding SmarTeam. xLM has tools such as [www.gotomeeting.com](http://www.gotomeeting.com) which allows us to remotely access client computers' to see issues first hand and provide resolutions. In addition, xLM makes use of virtualization technology to mimic customers' environments in time when remote access is not possible or to create a local customer environment in which to debug issues. This support goes significantly beyond the basic defect support provided by SmarTeam/IBM/VAR. Support contracts can be set up to meet your needs. However, many contracts are set up based on an hourly basis where you are

only charged when you consume support hours.

Many customers have already mentioned their satisfaction regarding support provided by xLM. Some of their comments focus on the turnaround time for resolving issues, the expert knowledge xLM has regarding SmarTeam and how xLM was able to resolve issues that could not be resolved by other support organizations. Many of the customers express that our services are always performed in a very friendly amiable manner and that we are very easy to work with.

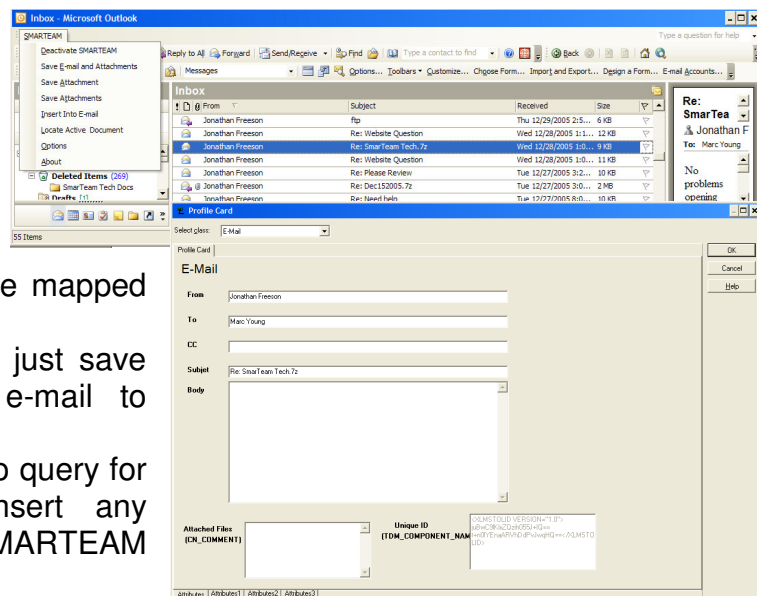
If interested in setting up a support contract with xLM, please contact us and we can discuss an initial trial support contract.

## ***SMARTEAM Tools***

### **Microsoft Outlook Integration**

Do you have the need to manage emails in your SmarTeam database? Do you need to take attachments from emails and store them in SmarTeam? What about email files that exist in SmarTeam? If you are consistently performing such activities, you may want to consider the service offering Microsoft Outlook Integration developed by xLM Solutions. The integration provides the following functionality:

- Save E-mail and Attachment - Prompt the user to save an e-mail (s) into SMARTEAM. As in other SMARTEAM integrations, MS Outlook E-mails can be configured to be mapped to different classes in SMARTEAM and different properties from MS Outlook can be mapped to fields in SMARTEAM.
- Save Attachments - The ability to just save any attachment in a selected e-mail to SMARTEAM.
- Insert Into E-Mail - Allow the user to query for objects in SMARTEAM and insert any selected object's file stored in SMARTEAM into a new e-mail message.
- Save Contact - The ability to save Contact Data into SMARTEAM very similar to the Save E-mail and Attachments function
- Locate Active Document - Allow the user to select a e-mail from Outlook and determine if the e-mail has been saved in SMARTEAM. If the e-mail



- has been saved, a profile card will appear representing the e-mail.
- User configurable options for the product include:
    - Save E-mail Attachments as Children of E-mail Object
    - Automatically Delete E-mail after Save
    - Automatically Delete Attachment after Save
    - Save Attachments as Children links or General Links

Customers are benefiting from such an integration by automating their method to save Outlook e-mail data with SMARTEAM. Allowing complete project/product related data to be stored and managed in SMARTEAM is critical to your operation. Not only can important information be accessed quickly, but legal issues may be more easily resolved when persons can easily refer to email communications; some of which may be several years old.

## ***SMARTEAM Tips You've Been Looking For***

---

### **Changing Display Settings in SmarTeam Web Editor System Wide**

The following tip describes how to easily apply configure Web Editor display setting on a global basis, based on a specific users settings.

How often do you have a requirement to make a system wide change to the display attributes in SmarTeam Web Editor. For example, a new field has been added to the database and you want all users to be able to see it in the SmarTeam tree.

In a recent web editor based SmarTeam implementation we had to apply preferences from one user to all other users in an effort to make the display attributes consistent by default. In Web Editor the display attributes are stored in the data base. Simply trying to use the Data Model Designer display fields would not do the job as it does not allow adding reference to class and other non character base fields. The following script is an example of applying document preferences to all users based on Joe's or another default users settings. We found it to be a useful solution. The script adds display attributes to users who have not already changed their preferences manually (skip those users).

The following is an example of our C#.net code to provide such functionality:

Note the following Constants used in the code below:

- OBJECT\_ID is "OBJECT\_ID"
- CLASS\_ID is "CLASS\_ID"
- TDM\_USER\_OBJECT\_ID is "TDM\_USER\_OBJECT\_ID"
- TDM\_DISP\_ATTR\_DATA is "TDM\_DISP\_ATTR\_DATA"
- ST\_CLASS\_DISPLAY\_ATTR\_SET is "Display attributes settings"

```

static public short UpdWebDisplayAttrPerUser(SmApplic.ISmSession Session,
SmRecList.ISmRecordList FirstRec)
    { //update WED display attributes in TDM_SW30_DSP_ATTR_SETTINGS through thick
client based on joe's settings

    SmApplic.ISmBehavior behavior = Session.ObjectStore.DefaultBehavior.Clone();
    behavior.CheckAuthorization = false;
    behavior.ConfirmOperations =
SmarTeam.Std.Interop.SmarTeam.SmApplic.ConfirmOperationEnum.coYesToAll;
    //search for all users
    SmApplic.ISmQuery smUsrQuery = Session.ObjectStore.NewQuery();
    smUsrQuery.QueryDefinition.Roles.Add(Session.UserMetaInfo.User.ClassId, "F");
    smUsrQuery.QueryDefinition.Select.Add(OBJECT_ID, "F", false);
    smUsrQuery.QueryDefinition.Where.Add("", OBJECT_ID, "<>", 1, false, "F");
    smUsrQuery.RunEx(behavior);
    if (smUsrQuery.QueryResult.RecordCount > 0)
    {
        //query for joe's settings
        short dispalyAttrClsId =
Session.MetaInfo.get_SmClassByName(ST_CLASS_DISPLAY_ATTR_SET).ClassId;
        SmApplic.ISmQuery smQuery = Session.ObjectStore.NewQuery();
        smQuery.QueryDefinition.Roles.Add(dispalyAttrClsId, "F");
        smQuery.QueryDefinition.Where.Add("", TDM_USER_OBJECT_ID, "=", 1, false,
"F");

        smQuery.QueryDefinition.Select.Add(OBJECT_ID, "F", false);
        smQuery.QueryDefinition.Select.Add(CLASS_ID, "F", false);
        smQuery.RunEx(behavior);
        if (smQuery.QueryResult.RecordCount > 0)
        {
            SmRecList.ISmRecord recDispAttr = smQuery.QueryResult.GetRecord(0);
            SmApplic.ISmObject objjoeDisp =
Session.ObjectStore.ObjectFromData((SmRecList.SmRecord)recDispAttr, false).Clone();
            objjoeDisp.Retrieve();
            string dipAttr =
objjoeDisp.Data.get_ValueAsString(TDM_DISP_ATTR_DATA);
            int objId = 0;
            short clsId = 0;
            SmApplic.ISmObject objUsrDisp = null;
            SmApplic.ISmQuery dispPerUsr = null;
            for (int i = 0; i < smUsrQuery.QueryResult.RecordCount; i++)
            {
                //get object
                objId = smUsrQuery.QueryResult.get_ValueAsInteger(OBJECT_ID, i);
                clsId = smUsrQuery.QueryResult.get_ValueAsSmallInt(CLASS_ID, i);
                SmApplic.ISmObject obj =
Session.ObjectStore.RetrieveObject(clsId, objId);
                obj.Retrieve();
                //verify if user display record does not exist already
                dispPerUsr = Session.ObjectStore.NewQuery();
                dispPerUsr.QueryDefinition.Roles.Add(dispalyAttrClsId, "F");
                dispPerUsr.QueryDefinition.Select.Add(OBJECT_ID, "F", false);
                //dispPerUsr.QueryDefinition.Select.Add(OBJECT_ID, "F", false);
                dispPerUsr.QueryDefinition.Where.Add("", TDM_USER_OBJECT_ID, "=",
objId, false, "F");

                dispPerUsr.RunEx(behavior);
                if (dispPerUsr.QueryResult.RecordCount == 0)
                {
                    //create record for user
                    objUsrDisp = Session.ObjectStore.NewObject(dispalyAttrClsId);
                    objUsrDisp.AddAllAttributes();
                    objUsrDisp.SetDefaultValues();
                    objUsrDisp.Data.set_ValueAsInteger(TDM_USER_OBJECT_ID,
objId);
                    objUsrDisp.Data.set_ValueAsString(TDM_DISP_ATTR_DATA,
dipAttr);

                    try
                    {
                        objUsrDisp.InsertEx(behavior);
                    }
                    catch (Exception ex)

```

```

        {
            throw new Exception("Error occured while setting web
display attributes");
        }
    }
}
return 0;
}

```

Please note this code is working with SmarTeam V5R16 and V5R17. It has not been tested in other versions of SmarTeam and there is no guarantee it will work in other systems.

## ***SMARTTEAM Release Info***

---

The following SMARTTEAM versions will have end of service dates set forth below:

<b>SMARTTEAM Version</b>	<b>End of service Date</b>
SMARTTEAM V5R14	January 8, 2007
SMARTTEAM V5R16	June 2, 2007
SMARTTEAM V5R17	September, 29, 2008

### **SMARTTEAM V5R18 has been released October 1, 2007**

The following is the planed time frames for CAD Software support:

- SolidWorks 2008 (32-bit) planed support is Februarys 2008
- SolidWorks 2008 (64-bit) planed support is April 2008
- Inventor 2008 currently supported in V5R18, V5R17 supported planed for February 2008

After the end of service date, no more correction service packs, hot fixes or Dassault/SMARTTEAM support will be provided for that version. Customers running SMARTTEAM V5R14 are strongly encouraged to start putting an upgrade plan into place now to avoid disruptions later.

Note: SMARTTEAM V5R17 Foundation server is not supported on the Windows 2000 server operating system. Therefore, customers running the SMARTTEAM foundation server on a Windows 2000 server and who wish to upgrade to SMARTTEAM V5R17 will also require an operating system upgrade.

Note: With the release of SMARTTEAM V5R17 SP4 on March 7, 2007, SMARTTEAM is now using .net 2.0 framework. In the past SMARTTEAM was using the .NET 1.1. framework. SmarTeam will automatically install .NET 2.0 if it is not

The purpose of this newsletter is to provide general information. xLM disclaims all responsibility for any losses, costs or expenses incurred by any party relying on this information. You should contact xLM directly to discuss any of the items discussed in the newsletter before implementation.

WE'RE ON THE WEB!

[WWW.XLMSOLUTIONS.COM](http://WWW.XLMSOLUTIONS.COM)

already installed on the workstation. If any specific customizations were written in .NET 1.1. they may need to be recompiled in .NET 2.0.

Feel free to contact xLM Solutions regarding your upgrade needs.

\* Information provided by Dassault as of Jan. 4, 2007 and is subject to change.

## ***PLM – xLM Consulting Perspective***

---

Implementation, or should I say driving change and transformation, is what most consulting companies in our field do. Unfortunately, we often see cases in which the gap between the discovery phase (i.e. site analysis, solution's spec development) and the final results is very large. Writing an assessment spec and knowing the right way to do things are two different things. Translating the analysis into action, which leads to real change, is not easy to do. In many cases, too much effort in the discovery phase, with little experience in how to translate it into actions, results in frustrated clients and consultants. Sometimes, the simple "Engineering" of a step by step solution is simply not enough. People, politics and organizational culture all converge to have a big impact on the implementation/change. One misconception we noticed while implementing PLM solutions is that although management decisiveness is important, it is far from being enough. Do not assume that management support will be enough to motivate the governed workers. It is important to make the user a part of the process rather than rely on management edicts to enforce change. This is important because it is likely that the governed person will have a much greater impact on the success of the implementation than upper management. In addition, management vision is not always meaningful for the subordinates. Try to involve middle and lower level members in the core team to share their vision on the execution level and bring them on board with the change. We believe that unlike ERP and other enterprise systems such as CRMs, etc., PLM is a lot more dynamic, and different levels of execution all contribute to the vision. A management vision is also not "everlasting". "In practical terms, if a group needs a clearer vision for themselves, by all means help them create one" (Block, 2004)). One more point to be aware of is that developing common training material for all persons projects a message that "we know what is best for you and this is the way management wants it to be done." It is not always the best approach. Involving employees in developing training materials according to their needs and the likely questions they will have is a key to success. At xLM we normally try to develop material with a core team, or at least pilot training on groups of employees, so that we can later tune it to future groups' training.

Block, P. (2004). Flawless Consulting, second addition

The purpose of this newsletter is to provide general information. xLM disclaims all responsibility for any losses, costs or expenses incurred by any party relying on this information. You should contact xLM directly to discuss any of the items discussed in the newsletter before implementation.

WE'RE ON THE WEB!

[WWW.XLMSOLUTIONS.COM](http://WWW.XLMSOLUTIONS.COM)

## ***Communication & Feedback***

---

At xLM we would like to hear from you regarding your thoughts on the newsletter, any new topics you would like covered in future newsletters and your general SMARTEAM experience. As you may know from past experience with us or as we have explained in this newsletter, we are a consulting company with very extensive experience. We are here to help you with your SMARTEAM implementation and to partner with you on deploying any of the above solutions at your environment. We are also quite adept at developing new solutions and customizations to solve difficult problems and simplify your processes.

To contact us, please email to <mailto:info@xlmsolutions.com>  
Our personal email addresses for those of you who may not have met us before is <first letter of the first name><lastname>@xlmsolutions.com. We can also be contacted directly at 248.926.5932

The purpose of this newsletter is to provide general information. xLM disclaims all responsibility for any losses, costs or expenses incurred by any party relying on this information. You should contact xLM directly to discuss any of the items discussed in the newsletter before implementation.

WE'RE ON THE WEB!

[WWW.XLMSOLUTIONS.COM](http://WWW.XLMSOLUTIONS.COM)