

TECHNICAL INFORMATION IFConneX FOR MS DYNAMICS 365

OPERATING SYSTEM

The PTC Windchill-MS-Dynamics-365-interface is installed in the context of PTC Windchill®. The operating system conforms to the specifications for PTC Windchill®.

TECHNICAL PREREQUISITES MS DYNAMICS 365

- PTC Windchill® as of version 10.1
- MS Dynamics 365 for Finance and Operations as of version 2012 R3

LINKING OF SEVERAL SYSTEMS

The interface allows the connection of several ERP systems to a PTC Windchill® system.

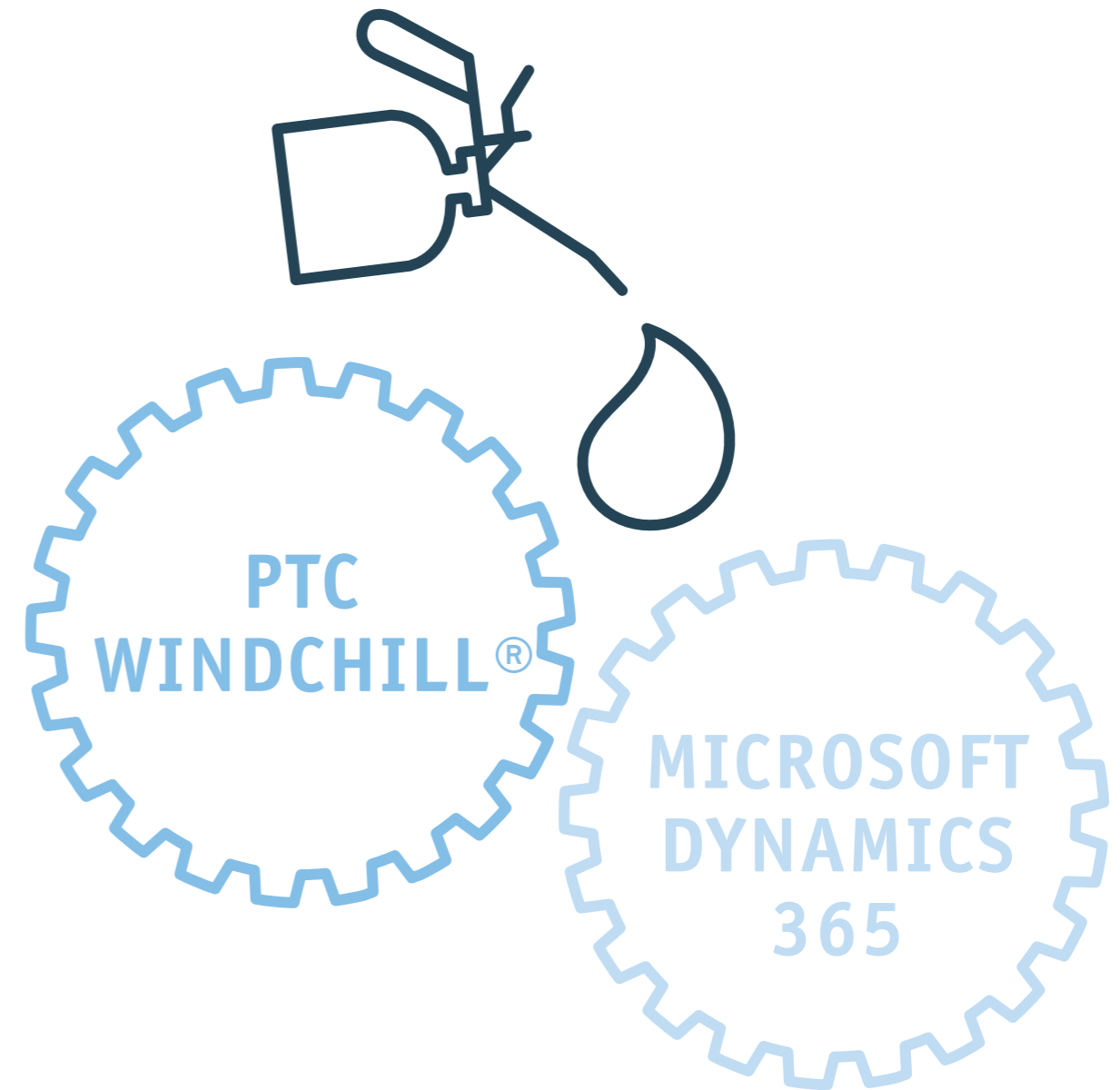
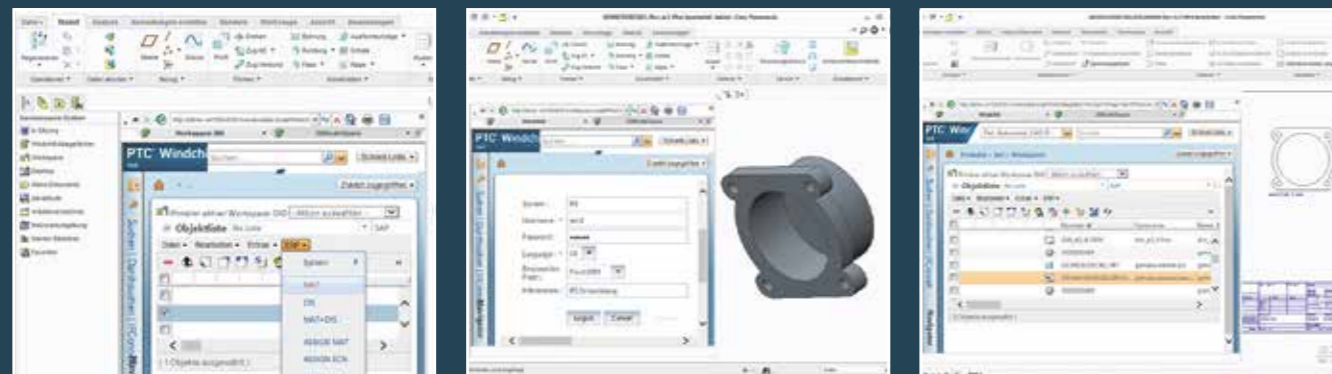
ADDITIONAL MODULES TO INTERFACE IFConneX RELEASE ENGINE (IFRE)

- Automated generation of visualization or exchange formats from PTC Creo® Parametric™ models and drawings in the background
- Control of the Release Engine from PTC Windchill® or MS Dynamics 365 for Finance and Operations
- Configurable neutral formats such as HPGL, TIFF, PDF, DXF, STEP, IGES
- Support for multiple drawing sheets
- Reading or updating of ERP relevant PTC Creo® Parametric™ parameters

- Automatic generation and export of neutral formats
- Bidirectional synchronization of the release process in PTC Windchill® and MS Dynamics 365 for Finance and Operations
- Automated notification via email
- Stamping of additional information on PDF drawings
- Digital signature for PDF

NUMBER GENERATOR (IFRE_NG)

- Automated assignment of part and document numbers
- Setup of multiple number generators
- Context-related number assignment
- Classifying number generation



IFConneX FOR MS DYNAMICS 365
FOR FINANCE AND OPERATIONS,
ON PREMISES & IN CLOUD



IFConneX FOR MS DYNAMICS 365

MANUAL DATA ENTRY IS OBSOLETE

- Product data is the capital of every company. But there are still companies that synchronize their data manually using isolated solutions.
 - They waste time inputting the same data multiple times at various points across the system, and this results in increased coordinating efforts between departments.
 - Identical parts are sometimes not recognized due to deviant manual entries, which can lead to losses in purchasing.
 - Ambiguous data can lead to purchasing and production errors.
- That is why effective and networked data management systems are indispensable for production companies.

EFFECTIVE DATA MANAGEMENT WITH PTC WINDCHILL® AS PDM SYSTEM AND MS DYNAMICS 365 FOR FINANCE AND OPERATIONS AS ERP SYSTEM

- Only a product data management system (PDM) can efficiently process and manage complex technical data in the field of design engineering and development.
- One of the best-in-class existing solutions, with its versatile CAX interfaces, is PTC Windchill® from the maker of the CAD system PTC Creo®. The link-up of PTC Creo®, in particular, is unbeatable.
- An efficient ERP system is required for logistics and financial data. MS Dynamics 365 for Finance and Operations is one of the most frequently used ERP systems in medium-sized companies.

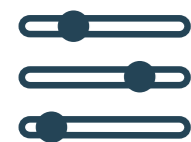
BETWEEN TWO WORLDS

- Isolated operation of the two systems, MS Dynamics 365 for Finance and Operations and PTC Windchill®, is not enough to guarantee a smooth flow of data for optimum process support in the company. The two systems must be closely integrated.
- The product structure must be displayed in parallel on both systems and kept up to date.

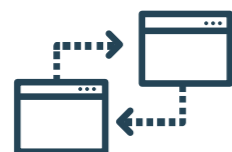
- Changes must be maintained in a timely manner in both systems, to be able to reliably produce and plan.
- Release and change processes for CAD drawings and CAD models must be supported across systems and sites.
- Departments such as purchasing, production and marketing need to visualize released CAD data directly from MS Dynamics 365 for Finance and Operations.

SYNCHRONIZED DATA ACROSS DEPARTMENTS AND SYSTEMS THANKS TO IFCONNECX

- The IFConneX interface for MS Dynamics 365 allows seamless, cross-system modeling of engineering processes in the PTC Windchill® and MS Dynamics 365 for Finance and Operations systems.
- It is easy to operate using menus in PTC Windchill®.
- At the press of a button, relevant parts in PTC Windchill® are created as product masters in MS Dynamics 365 for Finance and Operations or linked with existing product masters.
- A link to the visualization data for CAD model and CAD drawing generated in PTC Windchill® can be saved to the MS Dynamics 365 for Finance and Operations product to allow MS Dynamics 365 for Finance and Operations users a visualization of the CAD data.
- The part structure can be transferred automatically to MS Dynamics 365 for Finance and Operations as a bill of materials. If the CAD structure and the associated part structure in PTC Windchill® change, then the interface ensures for a synchronization with the MS Dynamics 365 for Finance and Operations BOM at the press of a button.
- This integration makes it possible to implement a cross-system release and change process.
- IFConneX for MS Dynamics 365 is configurable and permits flexible and efficient adaptation to customer-specific data and processes.



Controllable



Bidirectional Synchronization



Configurable



Real-time Operation

TECHNICAL INFORMATION IFConneX FOR MS DYNAMICS 365

STANDARD FUNCTIONS OF THE MS DYNAMICS 365 INTERFACE Supported objects in MS Dynamics 365 for Finance and Operations

- Product master
- Bill of materials

In PTC Windchill®

- Product
- Part
- Part structure
- CAD document
- Other documents
- Change request
- Change notice
- Promotion request
- Baseline

Functions MS Dynamics 365 for Finance and Operations product master

- Creating, changing of product master
- Synchronization of fields based on PTC Windchill® attributes
- Configurable mapping

Functions MS Dynamics 365 for Finance and Operations bill of materials

- Creating bill of materials based on CAD model structure or part structure (WT-Part structure)
- Consideration of different position types
- Synchronization of product fields such as
 - position numbers
 - quantity
 - unit
 - additional quantity
 - additional attributes

Functions MS Dynamics 365 for Finance and Operations changes

- Control of product master version
- Consideration of change numbers
- Control of changes from PTC Windchill® change workflow

PTC Windchill®-functionality

- Control options from PTC Windchill®
 - MS Dynamics 365 for Finance and Operations workspace menu
 - Action menu on the object
 - Activation of MS Dynamics 365 for Finance and Operations menu possible in other views
- Event-driven actions from PTC Windchill®
 - Attribute inspection at check-in
 - Increase the life cycle
 - Generate new versions
 - Configurable initialization of attributes for save as event
 - Inspection of the number and/or file name from the rename-event
 - Create or release the change notification
 - A range of other events can be used
- Features in the PTC Windchill Workspace
 - Read system attributes
 - Read user-defined attributes
 - Write user-defined attributes
- Further functions in PTC Windchill®
 - Automatic renaming of CAD documents and parts according to corporate guidelines
 - Cancellation of an event, e. g. check-in
 - Feedback via the event manager

