

# 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.

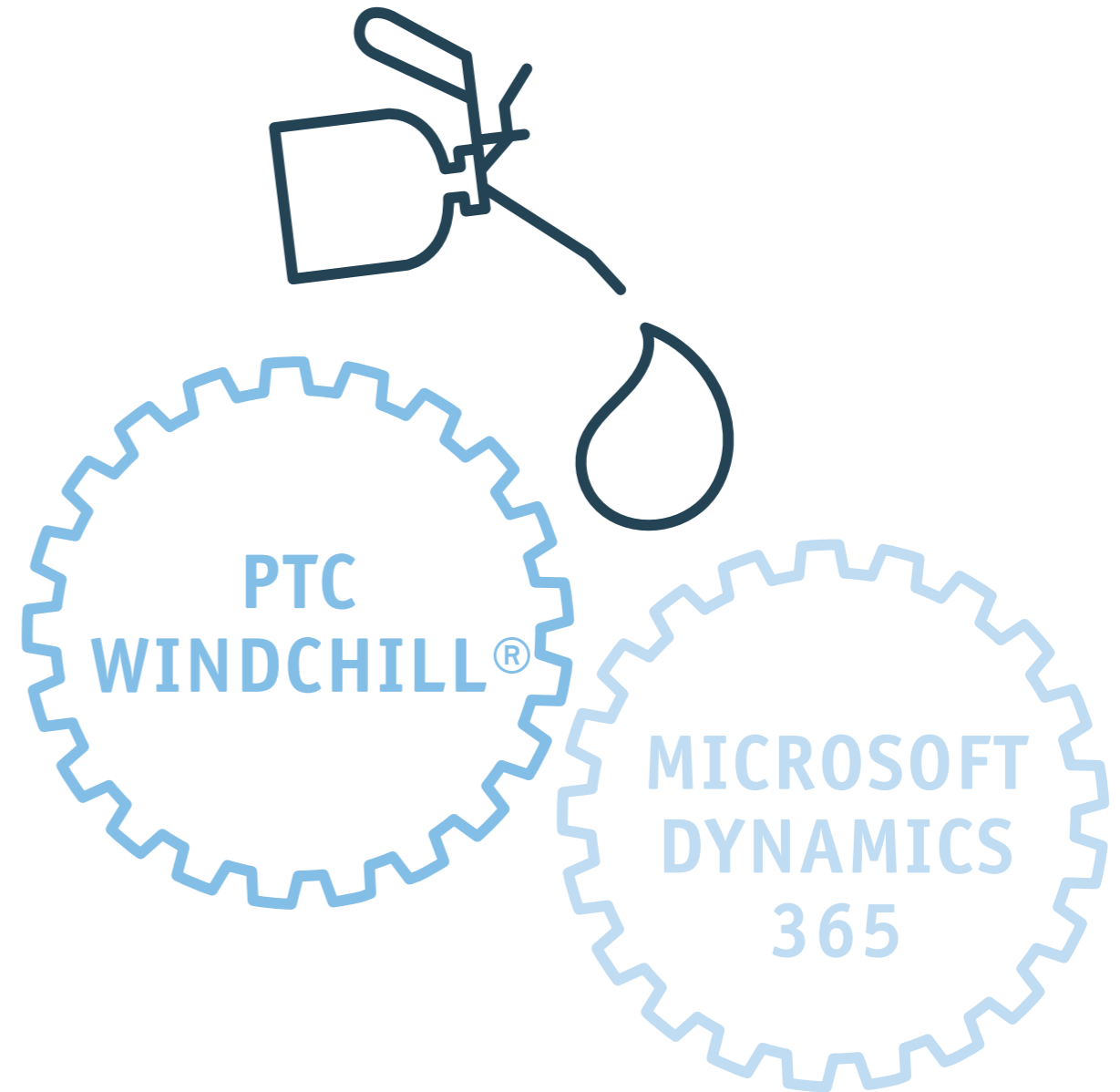
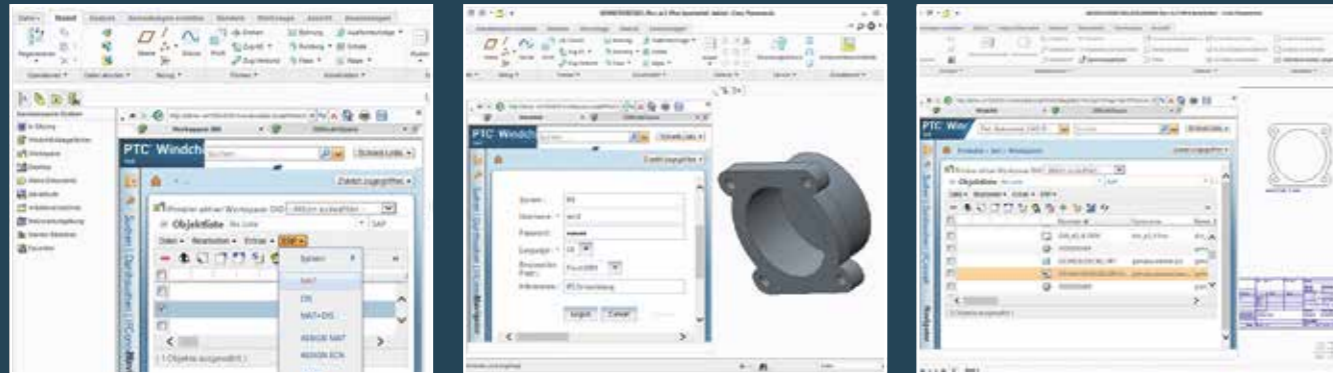
## ADDITIONAL MODULES TO INTERFACE IFConneX RELEASE ENGINE (IFRE)

- 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



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## Enterprise | Application | Integration

Innoface is worldwide one of the leading providers of interfaces that link PTC Windchill® with ERP systems. Our solutions ensure a reliable flow of information between construction and logistics.

# 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## MANUAL DATA ENTRY IS OBSOLETE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.

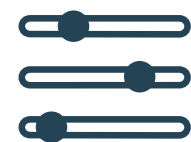
## BETWEEN TWO WORLDS

- 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.

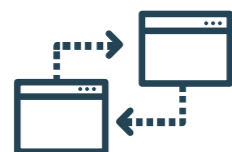
- Changes must be maintained in a timely manner in both systems, to be able to reliably produce and plan.
- Release and change processes for CAD drawings and CAD models must be supported across systems and sites.
- Departments such as purchasing, production and marketing need to visualize released CAD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

## SYNCHRONIZED DATA ACROSS DEPARTMENTS AND SYSTEMS THANKS TO IFCONNEX

- 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

