

The Porta~X Jumpstart Package

**A SolidWorks SAP Integration
for a fixed price**



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1 Introduction

Very often you hear that PDM/PLM projects were much more expensive than initially estimated. The primary target “cost reduction” was missed, or worse, was turned into the contrary.

With the Porta~X Jumpstart Package for Porta~X you have the choice to buy all the needed consulting for implementing a comfortable and easy-to-use SAP-SolidWorks integration at a fixed price.

2 Scope of work

In this chapter you’ll get an overview of all the work items included in the Jumpstart Package

2.1 Functional specification

We provide a workshop (which is typically 2 days) to specify all your requirements for the SolidWorks SAP integration. For this workshop we use a template which contains all the main questions and decisions. In this template all the open issues are marked with a yellow background– so it is easy for you to determine whether an issue has already been covered during the workshop or not. The functional specification lists all the definitions of the interface in detail, so that after finishing the document we are able to customize Porta~X independently to a large extend without asking many questions.

You can get the current functional specification template in advance.

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2.2 Creating a „Virtual machine” with the customer environment

For each customer we create and maintain a virtual machine (using VMWare) which contains your environment. This includes SolidWorks and the SAP-GUI with the releases used by you and will be setup on the operating system you typically use for the engineering clients. The virtual machine will communicate with your SAP test system via VPN („Virtual Private Network“).

2.3 Functionality

The exact functionality of Porta~X is outlined in the two manuals for the two existing Porta~X alternative setups called “SingleDIR” and “MultiDIR”. The standard manual for the alternative used by you will be part of the contract.

Here the functionality in an overview:

Area	Functionality
Document Info Record (DIR)	Create (also with higher version)
	Change
	Show
	Check In
	Check out
	Check out the assembly and all its components
	Create a new version
	Copy
	Cancel Check out
	Document search (with DIR classification search)
	Insert component in assembly
Material master record	Create - with or after document creation
	Link with existing Material Master Record
	Unlink from existing Material Master Record
	Search for Material Master Record (Matchcode) and open linked document
	Copy (together with the Document Info Record)
Bill of Material	Create (one level)
	Create (all levels)
	Change
	Delete
	Write BOM position numbers back to SolidWorks drawing
Engineering Change Management	Create Engineering Change record
	Show Engineering Change record
	Change Engineering Change record
	Search Engineering Change record
Extras	Separate CV04 Document search
	Product structure browser via Bill of Documents („Where used list“)
	Product structure browser via Bill of Materials
	Create all new Document Info Records (“Batch creation”) - only if internal document numbering is used
	Create all new Material Master Records (“Batch creation”) - only if internal document and material numbering is used

2.4 Customizing possibilities

Generally, buying the Jumpstart Package will not prevent you from customizing to a large extent so that you can meet your specific requirements. The following customization is possible for Jumpstart customers:

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2.4.1 Document numbering schemes

The document numbering scheme may either be external, internal (meaning numbers are taken automatically from SAP) or mixed (internal/external). The number ranges can be defined by you.

2.4.2 SAP Document Types

For SolidWorks files we offer 5 different document types for the SingleDIR alternative and 4 different document types for the MultiDIR alternative. The names of these document types are customizable:

No	SingleDIR alternative	MultiDIR alternative
1	SolidWorks Part	SolidWorks part with drawing
2	SolidWorks drawing	- not applicable-
3	SolidWorks assembly	SolidWorks assembly with drawing
4	SolidWorks standard part	SolidWorks standard part
5	SolidWorks standard assembly	SolidWorks standard assembly

2.4.3 SAP Status net

For document types 1-3 from the list above you can create a SAP status net with a maximum of 9 different states. For standard parts and standard assemblies we use a simplified status network. The status network for parts and assemblies are identical.

2.4.4 SAP User Exits after Status change

We help you implement a standard SAP User Exit (“change the state of a previous version in ‘not valid’ during release of a higher version”) if this is wished. In order to do this we provide the code for the BAPI as a text file. This has the advantage that you don’t need to provide us with a SAP developer key.

Other User Exits after status changes are not part of the Jumpstart Package and necessary in order to work with the standard Porta~X implementation. However, they can be bought as standard consulting.

2.4.5 SAP versioning

You can choose any versioning scheme from the available schemes in SAP. Only the type “versioning using a User Exit” is not supported.

2.4.6 Neutral format creation

Porta~X can be configured in a way that neutral formats can be created automatically when SolidWorks documents will be checked in. You can define at which status change this should happen. We can create up to 3 different neutral formats and add them to the Document Info Record during Check in.

The following types of neutral formats are available:

- PDF File of the drawing (also with multiple sheets)
- eDrawings model of the SolidWorks part or assembly
- DXF file of the SolidWorks drawing (single sheet only)

In order to create neutral formats the status change must be performed from within SolidWorks. Alternatively, it is possible to create neutral formats in a downstream process using a SAP conversion server – but this is neither included in Porta~X nor in the Jumpstart Package.

The creation of DXF files may be controlled using an attribute in the SAP document classification (“DXF required = True”).

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2.4.7 Drawing templates

We create a SolidWorks drawing template for one sheet size (e.g. Size A) based on your company template. This template shows all the defined fields from either the Document Info Record, the Material Master Record, the Engineering Change Record or the SAP status log. The modification of the other sizes will be done by you. Alternatively, we can provide you with a “block” which contains all the text references. This block can be integrated easily in all your SolidWorks sheet formats.

2.4.8 SAP Document Classification

For each document type you can create a document classification. Each classification may have up to 20 attributes which can be shown in the drawing template if wished. The names of the document classifications can be assigned freely.

However, the document types for parts and assemblies must have the same classification (applies only to SingleDIR).

2.4.9 SAP material number assignment

The number assignment for SAP Material Master Records may be either external, internal (meaning that numbers come automatically from SAP) or mixed (internal and external). The number ranges will be defined by the customer.

2.5 Installation and training

2.5.1 Installation of Porta~X on site with instructions for administrators

Porta~X can be administrated centrally. The “installation” on a client is nothing other than registering several components which are stored on a server. We will create an install script so that all clients can be easily installed. We assist you on site and install 2 clients. Additionally we make your CAD administrator familiar with the data structures used by Porta~X.

2.5.2 Installation of the SAP Content Server

The SAP Content Server is part of every SAP distribution. However, it may have to be installed on each site using Porta~X and SAP PLM. At one site we install for you the Content Server (if it is not already installed) using remote tools like WebEx – and your SAP specialists are asked to take part in this session.

2.5.3 Integration test

Together with your CAD administrator we check the delivered solution for functionality and accuracy using a predefined checklist. We make sure the requirements from the functional specification are met.

2.5.4 Key user training

The Jumpstart Package contains a 1 day on-site training for your design engineers or key users. We allow a maximum of 6 participants.

2.6 Not included in the Jumpstart Package

- The Jumpstart Package contains no Porta~X licenses – only consulting.
- A migration of existing CAD files into SAP PLM (no matter if they are SolidWorks data or other CAD data) is not part of the Jumpstart Package. However, we are able to offer a migration at a fixed price after having performed a two days functional specification workshop for the migration.
- Not included is the preparation of SolidWorks standard parts for usage with Porta~X. However, we deliver a tool which can be used to “inoculate” all standard parts with a SAP dummy document key – so they will be recognized as such by Porta~X. The addition of SAP

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Material numbers into the different configurations of SolidWorks standard parts will be done by you.

- If you would like to maintain data of other CAD systems besides SolidWorks in SAP PLM with Porta~X there is a broad range of supported CAD systems available – However, this is not part of the Jumpstart Package.
- We deliver the Porta~X standard user manuals in the .doc format (Microsoft Word), so you are able to document special solutions or changes of the standard behavior on your own. The documentation of customer specific changes does not belong to the Jumpstart Package.

3 Price

For the scope of services outlined in chapter 2 you pay a fixed consulting price of **19.900 €**. The payment is as follows:

- 10% after creation of the functional specification
- 70% after integration test
- 10% after user training
- 10% after project approval

Additionally travel expenses will be charged for 5 days.

The Porta~X software licenses are not included in this price.

4 Requirements

All the requirements outlined in the latest version of the document “Requirements for Porta~X” is an important part of our contract. This document will be handed out together with this description. The following outlines aspects which are either not named in the document or are of extremely high importance:

- A running installation of SolidWorks will be assumed as a given fact and is not part of the Jumpstart package.
- Further we assume that you are running SolidWorks on an operating system and using hardware which is compliant to the specification given by SolidWorks - see also <http://www.solidworks.com/pages/services/SystemRequirements.html>
- In order to offer the convenient price for the Jumpstart Package the customizing of Porta~X for your company must be done remotely from our office in Germany.
- In order to access your SAP test- or quality system we need a VPN tunnel to this system. However, we will never ask for remote access to your productive SAP system or to any file on your servers.
- For rolling out the Jumpstart Package we assume that
 - SAP is already implemented in your company
 - Your staff has basic knowledge about the usage of SAP. However, a prior knowledge in the area of document management with SAP is not needed
 - You have a sufficient amount of SAP named user licenses for those who will work with Porta~X

In order to answer your questions quickly and to look at problems on site if necessary we need a remote assistance tool. We use the tool “WebEx” company-wide. If you prefer another remote assistance tool (e.g. “Netmeeting” or “Teamviewer”) you must provide us with the software and the needed licenses.

The remote assistance software will also be used in order to perform the SAP customizing or the installation of the SAP Content Server together with your SAP specialists.

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5 Contract cancelation

Both parties may cancel the contract without naming any reason during the Functional Specification workshop phase. This should give both parties the chance to stop the project if the expectations can not be realistically met.

If we cancel the contract you will not be charged for this workshop.