

PDM Web-based

Opportunities, Risks and Unanswered Questions

Sharing and Controlling Product Data Over the Web

June 19-21, 2000
Waltham/Boston

Featuring:

- **Ed Miller**, CIMdata
The Future of PDM: Vendor Stability and Converging Technologies
- **Exclusive candid interview**, by **Brion Carroll** of the PDMIC and Life Cycle Solutions with PTC's **James Heppelmann**, two of the foremost technology and product development visionaries of our time — *see page 5*
- **Implementation Case Studies** — Experienced practitioners from:
 - LUCENT TECHNOLOGIES
 - KEITHLEY INSTRUMENTS
 - FLUKE
 - MEDTRONIC PHYSIO-CONTROL
 - DRAPER LABORATORIES
 - HOUSEHOLD PRODUCTS
 - FORD/ROCKWELL
- **International PDM User's Group (IPDMUG) Conference** - interactive forum exclusively for PDM users — *see page 6*



An unbiased, user-focused conference on how to make the right system decisions for today and the future

Seize Opportunities...

- Unprecedented collaboration capability across the extended enterprise
- Greater speed, accuracy and profit
- Integration with enterprise-wide applications

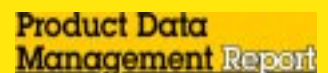
Reduce Risks...

- Web security
- Hidden costs
- Wrong vendor - changing industry

Resolve Unanswered Questions...

- Pros and cons of commercial web-based systems
- Underlying organizational issues and policy considerations
- Surviving PDM "mergers and acquisitions mania"

Supporting Organizations:



PDM Information Center
www.pdmic.com



Society of
Manufacturing
Engineers



For conference updates and on-line registration:
www.ManagementRoundtable.com
or call 1-800-338-2223 for more information

Web-Based Product Data Management: Opportunities, Risks and Unanswered Questions

As the Internet enables unprecedented levels of collaboration among product development teams and extended enterprises, the opportunity to speed cycle time and reduce costs has never been greater. A new generation of web-based systems and solutions is emerging to facilitate what some call “collaborative product commerce,” or “e-Product Definition Management,” and a variety of other labels – all of which serve to confuse the community that up until recently has been known as “PDM.”

The key questions are:

- What does this new generation of web-based systems offer that the previous generation of PDM systems didn't – other than the obvious web-enablement?
- What are the implications for users and prospective users? How do you make sure you derive the potential benefits without falling victim to hype and unnecessary organizational upheaval?
- When, and if, you decide to buy a new system or to web-enable your existing implementation, what steps should you take to protect your data and your investment?
- How do you ensure security over the web when sharing sensitive information with suppliers, partners and customers?

Management Roundtable's conference **Web-Based Product Data Management: Opportunities, Risks and Unanswered Questions**, June 19-21, 2000 in Boston, will take a no-nonsense, hard look at the realities behind the e-business rhetoric. You will hear from the architects of the new systems and users of the “old” systems alike. You will learn from some of the most advanced, experienced (and wise) practitioners who've both migrated from and integrated with legacy systems. You will be able to ask questions in a non-sales-oriented environment and get straight answers.

With a firm focus on users' needs (and no rush to change the PDM label until the industry's identity crisis is resolved), this conference will bring together the foremost experts and users to help you make practical decisions that you can implement in the near future – and use successfully for the long run.

12 Key Benefits

- How to develop a scorecard with objective criteria to level the playing field when evaluating Web-based PDM systems
- How to define the vendor's involvement in your implementation so that you maximize expertise while minimizing hidden costs
- What kind of performance to realistically expect from Java, HTML, and XML. What are the tradeoffs between these Web standards?
- How to manage legacy data – when to integrate vs. when to migrate
- Which authorization and authentication measures are best for your organization—passwords, ID cards, electronic signatures, user certificates
- How to protect security without hindering collaboration—what goes over which firewall, and who has ultimate control
- How to effectively design business processes for a Web-enabled organization
- How to share data across the extended enterprise with suppliers, customers, and non-traditional users
- How to stay ahead of PDM “mergers and acquisitions mania” and develop a contingency plan in the event your vendor is not around to support you
- How to make smart investment decisions about your suite of Web-based product development tools – and know which technologies will converge in the near future
- What are the possibilities – and limitations – of the new hosted ASP product development applications
- Evaluate the pros and cons of customizable systems vs. out-of-the-box packages

“ Well done...very organized...great information!”
- Jerry Voorhies, Principal Administrator,
Toyota Technical Center USA, Inc.

AGENDA (subject to change)

Monday, June 19 - PRE-CONFERENCE WORKSHOPS

- 7:30a-8:30a *Registration and Continental Breakfast*
 8:30a-12:00p **Guide To Selecting A Web-Based PDM System** –
 Instructor: Brion Carroll, PDM Information Center
 and Life Cycle Solutions, Inc.
 12:00p-1:00p *Lunch*
 1:00p-4:30p **Managing Web Security in the Extended Enterprise** –
 Instructor TBA
 4:30p-5:30p *Networking Reception*

Tuesday, June 20

- 7:00a-8:00a *Registration and Continental Breakfast*
 8:00a-9:00a **Enabling E-Business Using Web-Based PDM** -
 John Ferman, Keithley Instruments
 9:30a-10:00a *Break/Exhibits*
 10:00a-11:00a **Emerging Standards in Authentication and
 Authorization** - Kevin Dyer, Draper Laboratories
 11:00a-12:00p **Complex Application Integration and Data Migration
 Decisions** - Jeffrey Kennedy/Henry Kornstedt, Household
 Products, Inc.
 12:00p-1:00p *Networking Luncheon*
 1:00p-3:00p **Overcoming Technical Challenges of Integration
 and Security at Lucent** - Jason Browning, Lucent
 Technologies
 3:00p-3:30p *Break/Exhibits*
 3:30p-4:15p **Meeting of the Minds** -
*Exclusive Interview with James Heppelmann
 by Brion Carroll*
 4:15p-5:00p *Audience Q&A*
 5:00p-7:00p *Networking Reception*

Wednesday, June 21

- 7:15a-8:00a *Continental Breakfast*
 8:00a-9:30a **KEYNOTE: The Future of PDM** - Ed Miller, CIMdata
 9:30a-10:00a *Break/Exhibits*
 10:00-11:30 am **Developing A Scorecard for Team-Based PDM System
 Selection** - Boris Cononetz, Medtronic Physio-Control
 11:30a-12:30p **Is The Web A Panacea?** - Peter Barbee, Fluke Corp.
 12:30p-1:30p *Luncheon*
 1:30p-2:30p **Using the ASP Model** - Mike Dominik, NetIDEAS, Inc.
 2:30p-3:30p **Managing Product Designs & Data Anytime, Anyplace**
 - Paul Grayson, Alibre, Inc.
 3:30p-4:00p *Break/Exhibits*
 4:00p-5:00p **Choosing the PDM Approach That's Right For You?**
 Brion Carroll, PDMIC and Life Cycle Solutions

Pre-Conference Workshops

Monday, June 19

Morning Workshop - 8:30a - 12:00p

A. Guide To Selecting A Web-Based PDM System – Instructor: Brion Carroll, PDM Information Center and Life Cycle Solutions, Inc.

This session is a must-attend for those looking for the right Web-based PDM solution. Key workshop activities include:

- Understanding the features that are most often criteria in a PDM solution acquisition
- Obtaining true requirements from your company's key players
- Assembling these requirements in a way that leverages the evaluation and selection process
- Performing a simulated evaluation/selection process

This is a must for PDM champions and key participants in the PDM solution evaluation and selection process. As an added benefit – **receive a 15% off certificate** for the Year 2000 version of the PDM System Evaluation Toolkit.

Afternoon Workshop - 1:00p - 4:30p

B. Managing Web Security in the Extended Enterprise – Instructor: TBA

Web security has been in all the headlines recently. The thrill of online connection is subsiding as we come to terms with the fact that the same technology that offers such tremendous collaboration potential is also vulnerable to infiltration by hackers—and competitors. This intensive workshop will cover:

- How to make security decisions that are aligned with corporate strategy
- Security architecture and internetworking standards
- Encryption methods
- Security tools and applications
- Authentication and authorization methods, such as digital certificates, user IDs, and electronic signatures

Tuesday, June 20

Integrating PDM Into E-Business Strategy

John Ferman, e-Business Project Administrator, Keithley Instruments IPDMUG Member

PART ONE: Web-Based PDM & E-Business At Keithley

Keithley has made a strong commitment to adopting an e-business strategy using MatrixOne. In the first half of this presentation, John Ferman will describe Keithley's 5-year plan to leverage the Web by electronically integrating various information systems—PDM, CAD, ERP, CAM—across traditional and non-traditional functions, including engineering, sales, marketing, field service, and suppliers. You will learn:

- How to map out the processes and determine activities and priorities
- Which applications to keep, which to expand, and which to buy new
- How to administer this multi-discipline project concurrently with day-to-day business

PART TWO: Managing Customer's Systems Configurations Using PDM

Historically at Keithley, field service reps and overseas affiliates relied on manual (paper) data; as a result, determining as-shipped product configurations and tracking changes to those configurations by a system serial number was difficult at best. John will share the results of a new pilot project using e-Matrix that allows field service reps to access customer system configurations via web-based PDM. You will learn:

- How to link to databases that allow online viewing of customer, proposal, sales order, and work order information
- How to plan and map the necessary processes

- How PDM can reach its full e-business potential

Emerging Standards in Authentication and Authorization

Kevin J. Dyer, Solutions Architect, Draper Laboratory IPDMUG Member

Draper Laboratory designs electronic, mechanical, and software products of a highly sensitive nature for the military and other government agencies. While the Web presents greater ease of data sharing between partners, it also presents tough security challenges.

Kevin Dyer will describe Draper's internally developed system and discuss:

- How to use commercial hardware encryption devices to create a virtual extranet over the Internet
- How to use a Secure Socket Layer (SSL) to further protect the data when it traverses an untrusted LAN
- How to use a two-step authentication and authorization user identification process
- Pros and cons of ID cards and electronic signatures
- Emerging standards that will help make user identification easier in the future

Complex Application Integration and Data Migration Decisions

Jeffrey Kennedy, Engineering Documentation Supervisor/Henry Kornstedt, Engineering Documentation Systems Manager, Household Products

When Household Products replaced its CAD system with Pro/E in 1998, its then-PDM system was no longer compatible. The company selected Windchill in 1999, and is currently in the thick of implementation. Household made the decision to integrate Pro/E while simultaneously migrating data from legacy systems directly to Windchill. Find out:

- Why Household decided to forego Windchill's legacy integration capability in favor of data migration
- How the team decided what legacy data to retain
- Technical steps involved with the data migration
- Why Household made the decision to use Workgroup Manager for Pro/E over Intralink

Overcoming the Technical Integration Challenges at Lucent

Jason D. Browning, Technical Manager, PDM Development Group, Lucent Technologies

PART ONE: The Integration Challenge

Lucent's PDM development group is responsible for deploying PDM across several major business units to meet corporate needs, including supply chain management. The two main projects currently underway are an extension of Windchill that integrates with other enterprise applications; the second is the Web-enablement of a legacy system to integrate with Windchill.

Jason Browning will share how Lucent has deployed middleware and Web technology to tie multiple systems together and provide the end-user with an integrated view of product data and functionality.

PART TWO: How Lucent is Managing Security Through Bidirectional Access

(Description TBA)

Visit our website for last minute program updates or to register online:

www.ManagementRoundtable.com

"As always, this is a very worthwhile conference...one of the few opportunities to find out what's happening with other companies, and to get an insight into how PDM is evolving."
- Jim Fredrickson, Manager of Engineering Documentation, Pass & Seymour/LeGrand

Tuesday, June 20 continued...

MEETING OF THE MINDS: An Exclusive Interview* **with James Heppelmann** *with Brion Carroll, PDMIC and Life Cycle Solutions, Inc.*

**Everything you wanted to know about web-based PDM, Collaborative Product Commerce, managing complexity and the future of technology – (and maybe were afraid to ask?)*

Few people understand PDM technology and the needs of engineering better than Brion Carroll and Jim Heppelmann.

Brion, as co-founder of the PDMIC website, systems integration expert, and long-time advocate for unconfusing the PDM industry, and Jim, as lead architect of PTC's Windchill and the original Metaphase system, are both visionaries and geniuses in their own right. Neither of them puts up with BS.

Imagine being part of their candid conversation – hearing unfiltered answers to the kinds of questions you don't often get to ask – but which have a major influence on the entire industry.

This exclusive interview session will be a highlight for anyone investigating a new system or wondering what to do about an existing installation. You will come away knowing:

- the difference between PDM and Collaborative Product Commerce (CPC) – how is it more than a rose by another name?
- the role of Java, HTML and XML in Windchill's future and the stability of these technologies
- how the Internet will affect engineering and the design process – beyond access to product data
- what IT resources and development efforts are required for deployment and maintenance of Windchill vs traditional client server

- about proxies vs replication for achieving federation, *and more*

You are highly encouraged to bring your own questions and comments – much of the session will be devoted to audience participation with Brion facilitating. This is a rare chance to gain developers' insights and to offer feedback that can shape the direction of the industry!

Wednesday, June 21

The Future of PDM: Vendor Stability and Converging Technologies *Ed Miller, President, CIMdata, Inc.*

The purchase of a PDM system involves a long-term partnership between your company and a vendor to ensure smooth implementation and ongoing maintenance. Renowned expert, Ed Miller, will discuss the implications of the recent rash of sales, mergers, and acquisitions in the PDM industry and what users must do to protect themselves in this rocky and volatile climate. He will reveal:

- What happens if your PDM vendor is sold, acquired, or closes down altogether?
- Important questions both new and current users should be asking their vendor.
- Blurring definitions between PDM and other product development tools, including where we may expect to see these technologies converge in the future.

Developing a Scorecard for Team-Based PDM System Selection

*Boris Cononetz, Jr., Manager, PDM, CM, and DOC Systems, Medtronic Physio-Control
IPDMUG Member*

Developing a method for evaluation and decision making on a Web-based PDM solution is imperative, and must be in place before the selection process is initiated. Boris, a former PDM vendor, will describe

the process Medtronic used to select MatrixOne, including:

- How to develop a set of system requirements for Web-based PDM that will foster buy-in by users and management
- How to educate the selection team without the vendor's involvement
- How to turn requirements into an objective scorecard
- How to calculate the scores and make a decision, even when the results seem too close to call

Is The Web A Panacea?

*Peter Barbee, Sr. Staff Engineer,
Fluke Corporation
IPDMUG Member*

Using the Web, be it Internet, Extranet, VPN, or Intranet is often presented as a magical solution....as if the Web makes all our problems disappear. This talk looks at Web deployment from the perspective of internal development and architecture; highlighting how many traditional challenges—such as connectivity, interface design, application availability, and data compatibility—still remain. Peter Barbee will also discuss benefits of using the Web; most notably high information availability and the way it can illuminate business process issues.

Using the ASP Model to Manage Risks and Contain PDM Costs

*Mike Dominik, Vice President, Strategic Planning/Chief Operating Officer,
NetIDEAS, Inc.*

Application Service Providers (ASP) are emerging for many enterprise software solutions, and PDM and related applications are no exception. The ASP provides many opportunities and presents many new questions and issues. Mike Dominik, a former IT Program Manager at Lockheed Martin with Web-based PDM experience, will discuss:

- What types of PDM solutions are candidates for ASP delivery?

more ►

“A good breadth of PDM subjects...good source of up-to-date knowledge on the state of PDM.”

- John Konik, Manager, Engineering Technical Center, Eastman Kodak

Main Program, continued...

- What should you look for in an ASP delivery model?
- How will an ASP address performance? operations accountability? customer service and satisfaction?
- How can ASPs satisfy your organization's needs for service and security?
- How will ASPs deal with varied degrees of customization and upgrades?

Managing Product Designs and Data Anytime, Anyplace: The New Generation of Collaborative Product Development - Paul Grayson, President and CEO, Alibre

Be among the first to hear the results of cutting-edge research recently conducted by Ford, Rockwell Collins, Honeywell, and other leading companies. These pioneers are paving the way for a new kind of architecture that combines and hosts mission critical product development applications – CAD and PDM – on the Internet using Windows 2000 servers. Don't miss this opportunity to learn about the possibilities and implications for your company.

Choosing a PDM Approach That's Right For You - Brion Carroll, PDM Information Center and Life Cycle Solutions, Inc.

It's the end of the conference, and you've heard about a variety of web-based PDM options. How do you synthesize this information to bring back to the office and choose an approach that's right for you? Hear Brion's unique perspective on the variety of Web-based PDM models—complex and customizable, out-of-the-box or ASP—and which is right for which situation. Or, take advantage of the opportunity to express your own thoughts or hear the opinions of your colleagues during a lively question and answer session. Brion's presentations are always a highlight of Management Roundtable conferences, and this one is not to be missed!



International PDM User's Group Conference

IPDMUG, The International Product Data Management

Users Group, will hold its annual conference immediately following the Management Roundtable program. This interactive forum begins with a dinner on Wednesday, June 21, 2000 at 6:00 pm and continues on Thursday, June 22 from 8:30 am-4:30 pm. You must be an IPDMUG member to attend; to apply for membership and register for the IPDMUG conference, please contact Bob Lynch at (919) 562-6636 or via e-mail at arlynch@earthlink.net. IPDMUG members attending the Management Roundtable conference may subtract \$100 from the MRT conference registration fee; IPDMUG membership will be verified before confirming the discount. Web address: <http://www.pdmic.com/ipdmug/>

IPDMUG represents and is exclusively for the users of PDM systems—regardless of vendor solutions used. It recognizes the need to communicate within the user community on issues of mutual interest, without the influence of a "selling" situation, which may be posed by vendors or consultants of PDM systems. Previous group meetings have focused on integration and interoperability of PDM systems, as well as some of the cultural and technical issues surrounding any PDM implementation.

About Management Roundtable



Management Roundtable (MRT) is the leading user-oriented source of information on product development. Its conferences, workshops, publications and research provide unbiased, cutting-edge insight into new technology and management approaches. MRT has had an annual conference on managing engineering data since 1985. For more information, visit: www.ManagementRoundtable.com

Supporting Organizations



Computer-Aided Engineering: The magazine for the digital enterprise. Upcoming issues will address: What is the future of CAD/CAM/ CAE/PDM? Where is the technology going? Where do users want to go? What general computing trends are impacting the industry? For more information, visit www.caenet.com.



Product Data Management Report is a monthly publication that helps you keep up with the ever-changing landscape of PDM. Implementing and using PDM systems is risky and complex. The *PDM Report* helps you minimize those risks by giving you information you won't get from a PDM salesperson. For more information, visit www.cadcamnet.com.



The **PDM Information Center** is an innovative organization dedicated to assisting the development and evolution of the growing PDM industry. Recognizing the need for a central source of information, the PDMIC hopes to eliminate the fragmentation of PDM resources by acting as a clearinghouse for all available educational information, products and services. For more information, visit www.pdmic.com.



The Society of Manufacturing Engineers (SME), headquartered in Dearborn, MI, is the world's leading professional society serving the manufacturing industries. For more information, visit: www.sme.org.



Engineering Automation Report is an established monthly subscription based newsletter that provides insight, analysis, and news regarding computer technology for users, management, and vendors in the mechanical engineering field. For more information, visit www.eareport.com.

"The information I received will be used to ask the 'right' questions that will help facilitate the implementation of PDM." - Robert Gilley, Webmaster, Southco, Inc.

June 19-21, 2000 • Waltham/Boston

Registration Form

Please accept the following registration(s) for:

- 2-day conference
- Pre-conference Morning Workshop A: "Guide to Selecting Web Based PDM Systems"
- Pre-conference Afternoon Workshop B: "Managing Web Security Issues"

Photocopy this form for additional registrants - please type or print clearly

1. **Name** (Mr/Ms) _____

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Others from my company who will attend:

2. 2-day conference Workshop A Workshop B

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781-891-8080 (9-5:30pm EST)

Conference Fees:
The 2-day main conference fee for June 20-21 is \$1,395

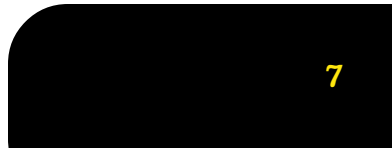
Pre-Conference Workshop Fees:
Half-day workshops are held Monday, June 19, and are \$395 each or \$695 for both with full conference registration – \$595/\$895 without. Workshop fees include materials and luncheon.

Team Discounts:
Groups of 3 or more may deduct \$100 per person. Fee includes two-day program, program materials, luncheons, cocktail receptions, continental breakfasts, and refreshment breaks. Please call for information on supporting organization discounts.

Hotel & Travel Accomodations:
Please call the Westin Hotel Boston-Waltham directly at 781-290-5600 to reserve a hotel room. Be sure to mention Management Roundtable to receive a special discounted rate of \$159 single or double.

Skyline Travel is the official travel agency of Management Roundtable. To take advantage of discounted reservations, please call (800) 255-3330 and mention Management Roundtable.

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PDM Opportunities, Risks
Web-based and Unanswered Questions

Sharing and Controlling Product Data Over the Web

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