

Parametric Technology Corporation

PTC[®] Customer Service Guide

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- For products with an Application button, click the button and then navigate to the product information.

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Contents

About This Guide	xi
Documentation for PTC Products.....	xi
PTC Documentation Conventions	xii
Types of Customer Service	1-1
What Is PTC Customer Service?	1-2
Identifying the Service You Need	1-2
Customer Care Center.....	1-2
Technical Support.....	1-3
Customer Care Center	2-1
Global Maintenance Support.....	2-2
Purchasing a Maintenance Support Program.....	2-2
Contacting Your Maintenance Support Representative	2-2
Choosing a Global Maintenance Support Program	2-3
Order Management	2-5
Contracts	2-5
Credit and Collections	2-5
Distribution.....	2-6
PTC Global Services	2-6
Training Services	2-6
Implementation Services	2-6
Product Development Consulting Services	2-7

Mathcad Integration with Partner Products and Custom Development	2-7
Assessment Services	2-7
License Management	3-1
Services Provided by License Management	3-2
Placing a Software Order.....	3-2
Obtaining License Codes for a New Software Order	3-3
Accessing Software License Information	3-3
Requesting a Customer Detailed License Report	3-3
Verifying or Updating Address and Hardware Information	3-4
Requesting a New License Pack.....	3-4
Modifying License Configuration	3-5
Using PTC Web Tools for License Management.....	3-6
License Management Privilege Levels	3-6
License Simplification	3-7
Accessing Phone Support.....	3-7
North America Service.....	3-7
Europe and Far East Service	3-8
Calling the License Management Department.....	3-8
Preparing for Your Call	3-8
Following Up Your Call	3-9
Using Additional Methods for Opening a Call	3-9
Tracking Calls on the PTC Web Site	3-9
Resolving Your Licensing Question.....	3-10
Escalating Your Licensing Issue.....	3-10
Technical Support	4-1
Entitlement for Technical Support	4-2
Mathcad Technical Support.....	4-2
VAR Technical Support.....	4-2
PTC Technical Support Benefits	4-2
PTC Technical Support Hours of Operation.....	4-3
PTC Technical Support ISO 9000 Certification.....	4-3
PTC Technical Support Feedback Line	4-4
Product Retirement and the Support Policy	4-4
Contacting Technical Support.....	5-1
Pre-Call Checklist.....	5-2

Preparing to Contact Technical Support	5-4
Opening and Tracking a Call to Technical Support.....	5-5
Opening Calls on the PTC Web Site	5-5
Tracking Calls on the PTC Web Site	5-5
Opening Calls by Telephone or Fax	5-6
Opening Calls by E-Mail	5-6
Processing Your Technical Support Calls	5-6
Resolving Your Question.....	5-6
Software Performance Reports (SPR)	5-7
Escalation of Issues.....	5-8
Understanding Call Priority	5-8
Process for the Enterprise Down Priority Level	5-10
Understanding Escalation Levels	5-12
Enhancements for Products	5-13
Submitting an Enhancement Request on the PTC Web Site	5-14
Tracking Enhancement Requests on the PTC Web Site	5-14
Sending Additional Data to Technical Support.....	6-1
Gathering the Required Data	6-2
Arbortext	6-2
CADD5, Optegra, and DIMENSION III.....	6-2
DIVISION ProductView.....	6-2
Electronic Design Entry (EDE).....	6-3
FlexPLM.....	6-3
Info*Engine	6-3
InterComm	6-4
Mathcad	6-5
Pro/ENGINEER.....	6-5
Pro/INTRALINK.....	6-6
Pro/ENGINEER Simulation (formerly Mechanica).....	6-7
Pro/ENGINEER Routed Systems Designer	6-8
Windchill Import and Export.....	6-9
Windchill Information Modeler	6-9
Windchill Installation and Configuration.....	6-10
Windchill Visualization	6-10
Sending Multiple Files	6-11

On a UNIX Platform	6-11
On a Windows Platform	6-11
Securing Data for Transfer	6-12
Handling NDA Data	6-12
Handling ITAR Data	6-13
Encrypting Data Using PGP	6-14
Sending the Data	6-14
Sending the Data on Disk or Tape Media	6-15
Sending the Data Using the PTC File Transfer Protocol (FTP) Server	6-15
Sending Data Using the PTC Secure FTP Server	6-17
Sending Data by E-Mail	6-17
Sending Data Using Call Logger and Call Tracker	6-18
Windchill Solutions Technical Support Guidelines	7-1
Overview	7-2
License Agreement and Legal Obligations	7-2
Customization	7-2
Requirements for Customization	7-3
Support of End Users	7-3
Error Tracking	7-4
Supported Configurations	7-4
Support for Windchill Solutions in Virtual Environments	7-4
Supported Windchill Solution Releases	7-5
Multiple Windchill Instances	7-5
Support of Dataloader Tools	7-6
Support of Windchill Customization	7-6
Support for Java Programming	7-6
Information Modeler	7-7
Programming Styles	7-7
Customer Source Code Examples	7-7
Creation of Custom Reports	7-7
Supported and Nonsupported Usage of the API	7-8
Decompiling Source Code	7-8
Supported Languages	7-8
Modification of Existing Windchill Classes	7-8
Windchill Classes	7-9

Windchill Class Extensions.....	7-9
JavaScript	7-9
Support of Third-Party Products.....	7-9
Installation.....	7-10
Configuration.....	7-10
Software Errors	7-11
Supported and Nonsupported Third-Party Issues	7-11
Support Contracts with Third-Party Vendors	7-14
Support for PTC PLM On Demand.....	7-15
Using PLM On Demand as a Super User.....	7-15
Following Up a Logged Call for PLM On Demand.....	7-16
Windchill Maintenance and Patches	7-16
FlexPLM Patches	7-17
Arbortext Products Technical Support Guidelines	8-1
Overview.....	8-2
Custom Application Development and Support.....	8-2
Training Services	8-2
Support for Arbortext Integrations with Partner Products.....	8-2
Technical Support.....	8-3
Assistance Using Arbortext Products	8-3
Exceptions and Limitations	8-3
Guidelines and Limitations for Support for Arbortext Advanced Print Publisher	8-5
Data Needed to Reproduce the Issue	8-6
Technical Support Web Site	9-1
Inside the PTC Technical Support Web Site	9-2
24-Hour Access to Calls, SPRs, and TANs	9-4
Connecting to the PTC Technical Support Web Site	9-5
Creating a PTC Online Account	9-5
Index	10-1
Worldwide Contact Information	11-1
Value-Added Reseller Technical Support	11-1
PTC Electronic Support.....	11-1
PTC Worldwide Technical Support	11-2
North and South America	11-2
Europe and Africa	11-3

Asia and Pacific Rim	11-6
Technical Support Customer Feedback Line	11-10

About This Guide

PTC Customer Service Guide describes services provided through Technical Support, the Customer Care Center (including License Management, Maintenance Support, Training, and Consulting), and the PTC Web site. It also provides general information on how to contact PTC (Parametric Technology Corporation). This guide is shipped with your software and is also available at www.ptc.com/support/cs_guide/index.htm.

Documentation for PTC Products

PTC provides documentation in the following forms:

- Context-sensitive Help
- PDF books
- Information located on the PTC Web site at www.ptc.com.

When your PTC software has been installed, you can right-click on any menu or dialog box to get Help. You can also choose a command from the Help menu.

All books are available in HTML and PDF formats on the documentation CD-ROM. You can view HTML books with your Internet browser. To view and print PDF books, you must have the Acrobat Reader installed.

PTC welcomes your suggestions and comments on its documentation. You can send feedback electronically to doc-webhelp@ptc.com.

PTC Documentation Conventions

PTC documentation uses the following conventions:

Convention	Item	Example
Bold	Menu paths, dialog box options, buttons, and other selectable elements from the user interface.	Click File > Save . Assignee check box. Click OK .
Courier	User input, system messages, directories, and file names.	Processing completed.
Courier with less-than and greater-than symbols(< >)	Variables for which the user substitutes an appropriate value	output=<LOADPOINT>

1

Types of Customer Service

Welcome to Parametric Technology Corporation (PTC) and to PTC Customer Service. PTC provides a number of resources and services to help you resolve your questions and concerns quickly and efficiently and to optimize your productivity with PTC software. This chapter identifies the different types of customer service PTC offers and tells you where each type is described more fully.

Topic	Page
What Is PTC Customer Service?	1-2
Identifying the Service You Need	1-2

What Is PTC Customer Service?

Customers can contact the Customer Care Center or Technical Support by phone or e-mail, or through our Web tools. PTC provides customer service in two forms:

- **Customer Care**—Assistance with administrative, licensing, training, and consulting issues. Customer Care is described in chapters 2–3.
- **Technical Support**—Assistance by engineers trained in solving technical problems with PTC software. Technical Support is described in chapters 4–8.

Identifying the Service You Need

Before you call PTC for customer service, determine whether you need the Customer Care Center or Technical Support. See the previous descriptions. Then, from one of the next two tables, choose the group best suited to serve your needs. The listed chapters describe the type of service provided by each group and the method to contact each group.

Customer Care Center

PTC Group	Task	Chapter
Maintenance Support	To renew or modify your Maintenance Support contract or to ask questions about your entitlement to software updates and technical support	Chapter 2
Order Management	To determine the status of purchase orders or evaluations	Chapter 2
Contracts	To request a license transfer	Chapter 2
Credit and Collections	To pay outstanding invoices	Chapter 2
Distribution	To order updates to CDs and to track shipments	Chapter 2
Global Services (Education and Consulting)	To obtain training, educational materials or consulting services	Chapter 2

PTC Group	Task	Chapter
License Management	To obtain license codes for PTC software that you have purchased or to update customer or software configuration information in the PTC database	Chapter 3

Technical Support

PTC Group	Task	Chapter
VAR Technical Support	To solve technical problems or ask questions about the usage of PTC software (for customers supported by a VAR)	Chapter 4
Technical Support	To solve technical problems or to ask questions about the usage of PTC software	Chapter 4
Technical Support Customer Feedback	To provide comments or suggestions to Technical Support management about services or to ask questions or to raise issues about service procedures	Chapter 4
Technical Support	To prepare to contact Technical Support for help on your issue	Chapter 5
Technical Support	To send additional data to a Technical Support Engineer to replicate and solve your problem	Chapter 6
Windchill Technical Support	To solve technical problems or to ask questions about the use of Windchill software	Chapter 7
Arbortext Technical Support	To solve technical problems or to ask questions about the use of Arbortext software	Chapter 8
Technical Support Web Site	To access the Technical Support knowledge base, access certain user documentation, or use the Technical Support Web tools	Chapter 9

2

Customer Care Center

This chapter provides an overview of what the Customer Care Center can offer. License Management is described in the next chapter, and Technical Support is described in separate chapters. The customer service departments—Technical Support, License Management, Maintenance Support, Order Management, Distribution, and Global Services—in North America and Europe are accessible through the Customer Care Center.

Topic	Page
Global Maintenance Support.....	2-2
Order Management	2-5
Contracts.....	2-5
Credit and Collections.....	2-5
Distribution	2-6
PTC Global Services.....	2-6

Global Maintenance Support

The Maintenance Support program at PTC is designed to help you operate at peak performance. The programs provide access to the latest releases of PTC software, 24x5 telephone support, 24x7 Web-based support including the Knowledge Base, management tools, and tips and techniques.

Purchasing a Maintenance Support Program

To sign up for a Maintenance Support program, contact a Maintenance Support representative as described in the next section. If you have a Maintenance Support program, one to two months before your program expires, you will receive a quote to renew Maintenance Support to cover your purchased software. Your Maintenance Support representative will contact you shortly thereafter to ensure that you have received the quote from PTC and to answer any questions you may have. Generally, the end dates of all items quoted are made coterminous. Let your Maintenance Support representative know if you prefer a common end date for budgeting or other reasons. PTC generally quotes on an annual basis, but multi-year terms are available.

Note: If you choose to purchase a Maintenance Support program for a license for which you have previously declined support, you must pay both the current and the retroactive Maintenance Support fees associated with that license. When you are ready to submit a payment, you can choose one of three methods:

- **Purchase order**—Fax a purchase order (not a purchase requisition) to your Maintenance Support representative. This method ensures the fastest service.
- **Credit card**—Fax a completed copy of our credit card request form to your Maintenance Support representative.
- **Check or purchase order**—Mail a check or purchase order (not a purchase requisition) to your Maintenance Support representative.

Contacting Your Maintenance Support Representative

Customers worldwide can call the Maintenance Support Representative for their region at the phone number listed at the end of this guide. You can also obtain contact information and details at the following URL: www.ptc.com/support/maintenance/index.htm.

Choosing a Global Maintenance Support Program

PTC recognizes your need to maximize productivity with PTC software. Therefore, PTC offers a Gold Support Package as our standard Maintenance Support program. The gold level provides the most comprehensive support program in the industry and a choice of premium options.

Maintenance Support Packages

Gold Support Package	
<ul style="list-style-type: none"> • 24 hours x 5 day telephone support (M-F) • 2-hour response times • Software fixes and automatic shipments of new releases • Web-based support, learning tools, knowledge database • Eligibility for discounted software upgrade packages • Customer Configuration Profile Database • Live and recorded interactive “Tips and Techniques” sessions 	
Enterprise Support Package (Gold plus...)	Premium Support Options
<ul style="list-style-type: none"> • 24 hours x 7 day telephone support with 1-hour response time • Priority shipment of new versions of releases • Technical Support Account Manager (for accounts of greater than \$1M maintenance per year) • Software Upgrade Installation Management (Pro/ENGINEER products only) 	<ul style="list-style-type: none"> • Dedicated Technical Support Engineer • Technical Support Account Manager • Weekend Support • Software Upgrade Installation Management (Pro/ENGINEER products only)

The Gold and Enterprise support offerings provide 24-hour telephone support on a first response for new issues raised with Technical Support. After the initial response, Technical Support may engage additional PTC resources to investigate the issue during normal PTC business hours.

Mathcad Support Package

PTC provides free technical support for new releases of Mathcad for the first 30 days. If you have a current maintenance agreement, you are eligible for technical support and automatic product updates.

Note: Information for Mathcad single-users is available at www.ptc.com/support/mathcad.htm.

Maintenance Support Features and Added Values

For information on these plans beyond that which follows, visit Global Maintenance Support at www.ptc.com/support/maintenance/index.htm. Added values are indicated by a checkmark (✓).

The Technology—Investment Protection and Enhancement

- Periodic software enhancements
- Ongoing fixes and performance upgrades
- ✓ Free software plug-ins and parts catalog
- ✓ Quality software development CMMI compliant
- ✓ Discounts on software package upgrades

The Team—Reliable and Consistent Technical Support

- Responsive Phone Support from +200 engineers using a common database
- Remote diagnostics and resolution of problems from the desktop
- ✓ ISO 9001-2008 certified process worldwide
- ✓ Multiple languages spoken in multiple time zones
- ✓ Standard escalation procedure
- ✓ Premium Support Options
 - Technical Support Account Managers and Dedicated Technical Support Engineers
 - Weekend Support
 - Software Upgrade Installation Management (Pro/ENGINEER products only)
- ✓ Comprehensive customer service guide

The Tools - Support and Productivity Web Tools 24x7

- Call Logger and Call Tracker
- Online tracking of Software Performance Reports (SPRs)
- ✓ Online software downloads

- ✓ Document Knowledge Database of 25,000+ items
 - Technical Points of Interest (TPIs)
 - Technical Application Notes (TANs)
- ✓ Natural language search and personalized alerts
- ✓ Suggested Techniques, FAQs, and Help documents
- ✓ Update Advisor of fixes made in new releases
- ✓ New product release reference documents
- ✓ Customer Configuration Profile
- ✓ Product Enhancement Request tool
- ✓ Business Asset Summary tool
- ✓ License Configuration and Management tools
- ✓ Live “Tips and Techniques” Web casts and “How to” videos

Upgrading to the Enterprise Support Package

For 24x7 telephone support and other special features for mission-critical applications, consider an upgrade to the Enterprise Support Package. Qualified customers receive dedicated support for priority issues and software upgrades. This package keeps your team as productive as possible. Contact your Maintenance Support Representative at the phone number for your region in the back of this guide.

Order Management

The Order Management group can tell you the status of purchase orders or of evaluations after your Sales Representative submits them.

Contracts

The Contracts group handles license transfers and name changes. If your company has been acquired or has acquired another company, the Contracts group will assist you in initiating a license transfer. If you company has changed names, the Contracts group can update this information at PTC.

Credit and Collections

The Credit and Collections group will assist you in questions regarding or in paying outstanding invoices and in checking the status of payments.

Distribution

The Distribution group handles orders for software updates and can assist you in tracking shipments.

PTC Global Services

PTC Global Services provides solutions to help you execute your product development strategy and to get the most value out of your investment in PTC technology. The range of services includes Training Services, Implementation Services, Product Development Consulting Services, and Assessment Services.

Training Services

PTC delivers a blend of high quality training designed to help users realize higher levels of productivity in a shorter timeframe. The following training services are available:

Training Courses—Unique technological insights not found elsewhere and interactive content in three formats:

- **Classroom:** Interactive training is designed and delivered by the PTC technology experts.
- **Virtual Classroom:** Instructor-led training over the Internet provides the benefits of classroom training without the travel expense.
- **Web-based training:** Self-paced training includes the same comprehensive content as other courses (lecture, demonstrations, hands-on exercises, and assessments)

Corporate Learning Programs—Personalized, role-based training curricula designed to meet specific needs

Pro/FICIENCY Tool—Performance-based assessments to evaluate proficiency levels to identify learning needs

For more information on training offerings, course schedules, or to register for a course, visit www.ptc.com/services/training.

Implementation Services

The Implementation Services deploy PTC technology to accelerate adoption of products and releases while minimizing disruption. Prepackaged, fixed-price services leverage the collective expertise from thousands of engagements to shorten learning curves and increase adoption rates for new technology.

Product Development Consulting Services

Product Development Consulting Services help you better leverage technology through high impact improvements in your product development processes. With over 20 years of product development experience and in-depth product knowledge, PTC understands best practices in the areas of engineering, collaboration, and other industry-specific processes and can help you implement them.

Mathcad Integration with Partner Products and Custom Development

If you want to integrate Mathcad with a partner product or you need consulting services, contact your Mathcad Sales and Services representative. If you do not know your Mathcad sales representative contact PTC at www.ptc.com/company/contacts/index.htm.

Assessment Services

Assessment Services examine your current product development environment including people, processes, and technology adoption to identify the highest value opportunities. PTC then delivers a personalized deployment strategy and business case outlining the benefits of the deployment.

3

License Management

The PTC License Management (LM) department generates and distributes license codes to PTC customers and maintains the related information, such as hardware and address information, in the PTC database. This chapter presents details on the services provided by the LM department. Many of the services provided are accessible on the PTC Web site, which allows you to access your own licensing information 24 hours a day.

Topic	Page
Services Provided by License Management	3-2
Accessing Software License Information	3-3
Modifying License Configuration	3-5
Using PTC Web Tools for License Management	3-6
Accessing Phone Support	3-7
Calling the License Management Department	3-8
Using Additional Methods for Opening a Call	3-9

Services Provided by License Management

PTC License Management (LM) provides the following services for obtaining and managing your PTC software products and licenses.

- Codes for new software orders.
- Access to PTC software license information, including the ability to request a current license pack, access or modify current address and contact information, and request a Customer Detail Report.
- Ability to modify existing license configurations, including removing and reinstalling software when replacing obsolete machines, consolidating licenses to a single server, and moving options from one license to another.

The PTC LM Web tools provide the most efficient management of your licenses at www.ptc.com/olm/index.htm. With the online tools you can perform almost every license management operation without calling a License Management representative. You can also contact License Management by one of the following methods:

- Call the Customer Care Center or the License Management office at the number listed in the Worldwide Contact Information at the back of this guide.
- Log a call via the Customer Care Call Logger at www.ptc.com/appserver/cs/cust_care_call_logger/CustomerCareCallLogger.jsp.

The PTC process for license distribution allows you to obtain the desired license configurations during the installation process. The processes for placing a software order and obtaining license codes for a new software order follow.

Mathcad and License Management

Specific information for Mathcad customers on license management is at www.ptc.com/support/mathcad_licensing.htm. In addition to contacting License Management through the standard phone numbers and Web page, you can e-mail license-related questions and requests to Mathcad-license@ptc.com.

Placing a Software Order

The process of placing a software order with a PTC sales representative and the shipping of the order is as follows:

- Place an order for new software with a PTC sales representative or authorized reseller. No hardware or installation information is provided with the software order.
- The order is entered into the PTC system and shipped to the designated address.
- Upon shipment, the “Ship To” contact on the order receives by e-mail a Shipment Confirmation Letter. This letter describes the contents of the order and provides the Sales Order Number (SON) you must use when you request a license code.

Obtaining License Codes for a New Software Order

PTC provides access your licenses online after you have received your Shipment Confirmation Letter and CD shipment. Use the following process to obtain your license codes:

1. Locate your Sales Order Number (SON) on the Shipment Confirmation Letter or on the packing slip.
2. Gather the hardware information (HOST ID) by starting the installation process or as outlined in Determining a Machine’s HOST ID on the PTC Web site at www.ptc.com/olm/ist1071/ist1071.htm.
3. Access the Configure New Software tool located on the PTC License Management Web site at www.ptc.com/olm/index.htm. A Web account with licensing privileges is required for access to this site. Sign up at www.ptc.com/appserver/common/account/basic.jsp.
4. Use the SON to access all of the products on that order.
5. Select the products for installation and specify the `cpu_id` and hardware information. Within one hour, a license pack is sent by e-mail to the specified address.

Accessing Software License Information

PTC provides access to current software license codes, address information, and all required license details.

Requesting a Customer Detailed License Report

PTC customers can request a Customer Detail Report, which lists the license information for each installation site.

Customer Number	Order Item
Customer Name	Release
Sales Order Number (SON)	Quantity
Purchase Order Number (PO)	Locked/Floating

Configuration ID or IDs	Maintenance Support Status
Install Number	Product Type
Serial Number	Service Contract Number (SCN)
CPU ID (Host ID)	Contract Status
Host Name	Contract End Date
Host Type	Contract Negotiation Date
Platform	Site
Service (SVC) Item	Contact Name
Item Description	Product Family

A Web account with reporting privileges is required to obtain access to the Detailed License Report. To obtain a Web account, sign up online at www.ptc.com/appserver/common/account/basic.jsp.

Verifying or Updating Address and Hardware Information

PTC customers must keep their hardware and address information as accurate and as up-to-date as possible. PTC sends information to businesses based on hardware-specific issues and contacts businesses with important information regarding Maintenance Support contracts, software updates, license information, and Maintenance Support releases.

To verify or update your address or hardware information:

1. Obtain the CPU ID or Configuration ID and Installation Site ID. See your Customer Detail Report or an existing license pack.
2. Access the Update Web tools on the PTC Web site at www.ptc.com/olm/index.htm.

The PTC Web site allows you to specify a new installation address and, if necessary, a different Maintenance Support shipping address. All information can be modified, including the contact name.

A Web account with licensing privileges is required to obtain access to update hardware information. To obtain a Web account, sign up online at www.ptc.com/appserver/common/account/basic.jsp.

Requesting a New License Pack

PTC Customers can request a current license pack. A license pack is convenient for businesses that must reconfigure their license or review their current licensing configurations. The license pack typically has all required information to complete any machine or software reconfiguration.

To request a new license pack:

1. Obtain one of the following pieces of information:
 - Service Contract Number (SCN)
 - Sales Order Number (SON)
 - Host ID (cpu_id)
 - Site ID (installation site number)
 - Configuration ID

This information can be found on the Customer Detail Report, in your currently installed software, or other administrative information sent to your customer site.

2. Access the Retrieve Existing License Packs tool located on the PTC Web site at www.ptc.com/olm/index.htm.
3. Enter the required information. The appropriate license pack is then sent by e-mail to the address specified in your Web account.

A Web account with licensing privileges is required to access this site. Sign up at www.ptc.com/appserver/common/account/basic.jsp for an account.

Modifying License Configuration

PTC customers can modify an existing license configurations, including removing and reinstalling their licenses when replacing machines, consolidating licenses to a single server, or moving options from one license to another. In a removal and reinstallation, all products and licenses associated with a machine can be removed and associated with another machine. This reconfiguration is most commonly performed when replacing a machine.

With the Online Reconfigure Software tool, you can move Config IDs to different machines, consolidate licenses to single server from triad servers, or break a triad server into single server.

To reconfigure PTC software licenses to obtain the desired licensing scheme:

1. Obtain the existing CPU ID and new CPU ID. You can find this information in your license pack, or you can extract it from the Customer Detail Report.
2. Access the Reconfigure Software Licenses tool on the PTC Web site at www.ptc.com/olm/index.htm.

3. Enter the appropriate information and submit the request. A new PTC License Pack is sent by e-mail to the address specified in your Web account.

A Web account with licensing privileges is required for access to this site. Sign up at www.ptc.com/appserver/common/account/basic.jsp for an account.

Using PTC Web Tools for License Management

PTC License Management Web tools provide a complete set of services for configuring, maintaining, and tracking your PTC software licenses. Continuous improvement of the tools ensures the most complete and efficient management of the information associated with your PTC software licenses and license requests. Review the tools at www.ptc.com/olm/index.htm for more details on your specific license management needs. The PTC License Management Web tools will process your request and provide you with a call number for tracking purposes. That call number can be used to further investigate the request you made through the Web tools.

License Management Privilege Levels

PTC has enhanced the License Management Web tools by adding additional security and providing businesses with increased control over their licensing information with the introduction of the License Management Privilege Levels. The privilege levels limit access to the LM Web tools and grant businesses the ability to define the privilege levels within their organizations.

Three privilege levels have been created—Supervisor, Licensing, and Reporting:

- **LM Supervisor Privileges**—Authorizes an individual to define the LM Privileges for everyone within the user's company. The LM Supervisor Privilege is only for managing the privilege levels of the company's users. There should be more than one individual at a company with LM Supervisor Privileges.
- **LM Licensing Privileges**—Allows editing capabilities for the user to manipulate their license information, such as installing new licenses, moving existing licenses and updating address or contact information. This privilege level does not include the LM Reporting Privileges.

- **LM Reporting Privileges**—Provides view-only capabilities with access to the LM Reports (Customer Detail Reports) and the ability to retrieve their existing license packs.

By default, all customer contacts have access to all of the LM Web tools. Once a supervisor has been assigned, the supervisor then has the ability and responsibility to define the privilege levels for the rest of the company. The existing privileges for the other customer contacts will remain in place until the supervisor removes this access. If someone without the appropriate LM privilege tries to use a Web tool, he or she will be directed to contact the LM Supervisor at his or her company.

License Simplification

License simplification provides an opportunity to consolidate PTC licensed products under one Service Contract Number (SCN) per CPU. Consolidated licenses increase the flexibility to configure licenses while also minimizing the number of SCNs for a site.

To receive the latest license pack required to run Pro/ENGINEER, you must perform license simplification, if you have not already done so. Thereafter, a new license pack for Pro/ENGINEER Wildfire 3.0 (version 27) will be sent to you by electronic mail.

For additional information on license simplification, please go to:

- License Simplification FAQ
www.ptc.com/olm/lm_faq
- License Simplification Overview and License Conversion Webcast
www25.placeware.com/cc/ptc/view?id=8010&pw
- Pro/ENGINEER Wildfire Installation and Administration Guide, Appendix A, License Management Software.

Accessing Phone Support

In addition to Web tools, PTC provides phone support for license management requests.

North America Service

For license management services in North America, call the Customer Care Center at the number listed in the Worldwide Contact Information at the back of this guide.

Europe and Far East Service

For license management services in Europe and the Far East, contact the appropriate PTC office by dialing one of the telephone numbers listed in the Worldwide Contact Information at the back of this guide. A complete list of License Management contact information is on the PTC Web site at www.ptc.com/olm/contacts.htm.

License Management services are located in the following offices:

- Munich, Germany
- Aix en Provence, France
- Tokyo, Japan
- Hong Kong, People's Republic of China

Calling the License Management Department

You can call the License Management department to make product configuration–related requests or license management requests, or to follow up a previous call. If you prefer, you can open calls by fax or e-mail instead. See Using Additional Methods for Opening a Call later in this chapter.

Preparing for Your Call

Before you make your call to License Management, gather critical information for the LM representative. Preparing this information in advance ensures a quicker and more efficient session.

Personal Information

The License Management representative will ask you for the following information to log a call:

- SCN (Service Contract Number) or SON (Sales Order Number)
- Priority of the issue:
 - Extremely critical—Work stopped
 - Critical—Work severely impacted
 - Urgent—Work impacted
 - Noncritical—Work unimpacted

General Information

The LM representative will ask you for the following hardware and software information needed to process your request:

- License Information
 - SON for a newly purchased license.
 - Configuration ID or Service Contract Number for an existing license.
- Address Information
 - Installation Address—Physical location of your PTC license server or client machines running PTC software.
 - Contact Information—Name, e-mail address, and telephone and fax numbers for all shipping, billing, administrative, and technical contacts.
- Hardware Information
 - License server or servers for floating licenses and floating optional modules.
 - Independent workstation or workstations for locked licenses.

Following Up Your Call

To follow up on an issue that has been logged, give the number you were assigned for the call, for example, C1234567, to the Customer Service operator. Refer to that number on any correspondence to the License Management department.

For further information, refer to the Support area of the PTC Web site at www.ptc.com/support/index.htm. This Web site contains answers to frequently asked questions, as well as links to portions of the Technical Support Web site.

Using Additional Methods for Opening a Call

Calls can be logged via the Customer Care Call logger located at www.ptc.com/appserver/cs/cust_care_call_logger/CustomerCareCallLogger.jsp.

Tracking Calls on the PTC Web Site

You can also use the PTC Web site to track your License Management calls by using Call Tracker located in the Technical Support section of the PTC Web site. This application allows you to view calls placed by your company to PTC Customer Service. Call Tracker provides

searching, tracking, and sorting capabilities. It also allows you to add your own comments to a call. When comments are added, the LM representative assigned to your call is notified automatically.

Resolving Your Licensing Question

A PTC License Management representative will work with you to resolve your question to your satisfaction. Have the information outlined in Calling the License Management Department in this chapter available when you place your call, so the LM representative can provide more efficient service.

When the LM representative sends the required software codes or notifies you that a request has been sent, the status of the call is changed to “Resolved.” Use the resolved call number for reference purposes only.

Note: If you have a new license management issue to report, do not refer to a resolved call number. Instead, use the LM Web Tools or call License Management directly.

If the LM representative determines that more specific information is required to resolve your issue, please include your call number, along with any additional information requested, in all correspondence to License Management.

Escalating Your Licensing Issue

Issues are prioritized when you first contact the License Management department. However, the priority of an issue may change during its resolution. To escalate the priority of an issue at any time during the resolution process, perform the following steps:

1. Contact the LM department. Identify the issue using its unique call number and ask to speak to the LM representative assigned to your call.
2. If that LM representative is unavailable, you may escalate an issue by requesting to speak with the LM representative’s direct supervisor (group leader).
3. If you are unable to escalate an issue through either the LM representative or the representative’s group leader, ask to speak to a section manager or manger.

4

Technical Support

PTC Technical Support provides assistance to customers in the technical aspects of using PTC software and in solving any problems that arise. This chapter gives an overview of PTC Technical Support.

Topic	Page
Entitlement for Technical Support	4-2
Mathcad Technical Support.....	4-2
VAR Technical Support	4-2
PTC Technical Support Benefits	4-2
PTC Technical Support Hours of Operation.....	4-3
PTC Technical Support ISO 9000 Certification	4-3
PTC Technical Support Feedback Line	4-4
Product Retirement and the Support Policy	4-4

Entitlement for Technical Support

You must have a Service Contract Number (SCN) before you can receive technical support. If you do not have a number, contact PTC Maintenance Department by calling the customer care line (listed in the back of this guide) or by using the online Customer Care Call Logger at

www.ptc.com/appserver/cs/cust_care_call_logger/CustomercareCallLogger.jsp

Mathcad Technical Support

PTC provides free technical support for new releases of Mathcad for the first 30 days. If you have a current maintenance agreement, you are eligible for technical support and automatic product updates.

Note: Information for Mathcad single-users is available at www.ptc.com/support/mathcad.htm.

VAR Technical Support

PTC participates in partnerships with various value-added resellers (VARs) around the world to help better serve PTC software product users. Some small enterprise businesses within North America and Europe now obtain software sales and support through these VARs. For more information on the services offered by VARs and to identify the VARs in your area, see www.ptc.com/partners/drp/index.htm.

PTC Technical Support Benefits

PTC Technical Support offers the following benefits:

- Scalable support offerings to fit each customer's individual needs
- 24-hour, 7-day-a-week access to our expanded and enhanced Web-based tools and services, as well as easy-to-use online purchasing services
- Worldwide language support
- Focus on continuous improvement and quality monitoring demonstrated through our global ISO 9000 certification
- Multiple channels for direct customer communication—electronic, phone, feedback, surveys—whichever is most convenient

For more details on the benefits of Technical Support, see www.ptc.com/support/maintenance/cs_benefits.htm. At this site, you can read more about the different levels of support.

PTC Technical Support Hours of Operation

Technical Support engineers provide support by phone and through the PTC Web site. Enterprise-level maintenance customers receive continuous support, 24x7. Gold-level maintenance customers received support according to the schedule in the next table. Gold-level and Enterprise-level support outside of Monday-Friday business hours is provided only in English.

- Enterprise-level support—Continuous support, 24x7
- Gold-level support—Workweek support, 24x5, as shown below

Region	Start Time	End Time
North and South America	Sunday 8 p.m. Eastern Time (ET) USA	Friday 8 p.m. Eastern Time (ET) USA
Europe	Monday (midnight) 12 a.m. Central European Time (CET)	Saturday (midnight) 12 a.m. Central European Time (CET)
Japan	Monday 9 a.m. Japan Standard Time (JST)	Saturday 9 a.m. Japan Standard Time (JST)
Asian Pacific Rim	Monday 8 a.m. China Coast Time (CCT)	Saturday 8 a.m. China Coast Time (CCT)

PTC Technical Support ISO 9000 Certification

PTC Technical Support offices are certified worldwide to ISO 9000 standards. This certification indicates our performance as a world-class support organization. This standard promotes consistent service, continuous self-improvement and a focus on customer satisfaction.

Successful certification means that all PTC technical support personnel adhere to a single set of carefully constructed processes and procedures in accordance with an internationally recognized standard and is validated by independent certification agencies. The result is that all customers receive the same quality of support.

Technical Support received its first ISO 9000 certification in 1999. In 2009 our current certification was upgraded to the ISO 9001:2008 standard. See our ISO 9000:2008 certificate:

www.ptc.com/support/ts/iso9001_2008.pdf

PTC Technical Support Feedback Line

PTC Technical Support would like to hear from you. If you need help with a technical problem, licensing, Maintenance Support contracts, training, or consulting, contact the appropriate group as described in this chapter. If you have comments, suggestions, or concerns regarding the services provided by PTC Technical Support, contact our Technical Support Feedback Line. The feedback line offers direct access to PTC Technical Support management. For more information on how to contact the PTC Technical Support Feedback Line, see the Worldwide Contact Information at the back of this guide.

Product Retirement and the Support Policy

The dates for the conversion of PTC products to limited and discontinued support and the related policies are in the PTC Product Calendar at www.ptc.com/cs/doc/pds_calendar.pdf.

5

Contacting Technical Support

The most important aspect of your relationship with PTC Technical Support is your ability to contact a technical support engineer and, if possible, to troubleshoot your problems and solve them by yourself. When you contact PTC Technical Support, your call is handled according to its content and your geographic location. This chapter describes the process of contacting Technical Support and obtaining help on your issue.

Topic	Page
Pre-Call Checklist	5-2
Preparing to Contact Technical Support	5-4
Opening and Tracking a Call to Technical Support	5-5
Resolving Your Question	5-6
Enhancements for Products	5-13

Pre-Call Checklist

Before you contact Technical Support, troubleshoot your issue by following the steps in the pre-call checklist:

1. See the Technical Support page of the PTC Web site at www.ptc.com/support/index.htm. This Web site contains thousands of technical documents, including:
 - Suggested Techniques—Recommended approaches to common tasks and descriptions of new functionality.
 - TANs (Technical Application Notes) —Documents that describe specific technical issues with PTC products. TANs generally include workarounds and anticipated software corrections.
 - TPIs (Technical Points of Interest)—Technical tips not necessarily associated with a particular release of a PTC product.
 - Product Help—Online access to the product’s Help system.
2. Read the appropriate documentation to verify that you used the correct procedure to achieve your intended result.
3. Determine whether you can reproduce the issue by performing the same procedure again, using the minimum number of steps.
4. Determine whether the issue also occurs in a newly created or a simpler model or object.
5. If you cannot solve the problem with the previous operations, record the following information before calling Technical Support:
 - The environment in which the problem occurs, including the product (for example, Pro/ENGINEER, Simulation, Pro/INTRALINK, CADD5, Windchill, Optegra), module, or mode (for example, Detail, Assembly, Part, Structural and Thermal Simulation, Explicit), and menu selections
 - Your hardware type and model, operating system version, amount of RAM, and swap space
 - Any messages that appear in the message or start window
 - Your software release, license version, and Service Contract Number (SCN)

To determine a release and version, see the following table.

Product	Action
Arbortext Advanced Print Publisher	Click Help > About Arbortext Advanced Print Publisher .
Arbortext Architect, Editor, Styler	Click Help > About Arbortext > Version .
Arbortext Publishing Engine Interactive	Click Help > About Arbortext Publishing Engine Interactive > Version .
CADDS 5	Click and hold the CADDS 5 logo.
DIVISION ProductView	Click Help > About ProductView .
Electronic Design Entry (EDE)	View the listing at the top of the application framework.
FlexPLM	View the listing in the footer of the FlexPLM home page. Alternatively, review the contents of the file: <SWT_HOME>/web-root/jsp/main/FlexPDM_Version.properties.
InterComm EDACompare	Click Tools > Settings . See the Version box.
InterComm EDAconduit	In EDA Generator, click Help > About and note the release, date code, and patch.
InterComm Expert	Click Help > About InterComm and note the release, date code, and patch.
Mathcad	Click Help > About Mathcad .
Optegra EPD.Connect	Click HELP > About EPD.Connect .
Optegra Vault (UNIX)	Use the UNIX command: more <\$EPD_HOME>/data/edmvers.
Optegra Vault (Windows)	Use the Registry Editor: Regedit hkey_local_machine Software, Computervision, Vault server.
Pro/ENGINEER	Click Help > Technical Support Info .
Pro/INTRALINK	Click HELP > About .

Product	Action
Routed Systems Designer	Click Help > On Version .
Structural and Thermal Simulation	Click Help > Technical Support Info .
Windchill DynamicDesignLink Windchill PDMLink Windchill ProjectLink	Click About <Product Name> , where <Product Name> is the name of a Windchill Solution.
Windchill PartsLink	Browse to the server machine folder <PartsLink loadpoint>\version.
Windchill Visualization	Click About <Product Name> , where <Product Name> is the name of a Windchill Solution.
Windchill ProductView	Click About <Product Name> , where <Product Name> is the name of a Windchill Solution.

Preparing to Contact Technical Support

Before making your call to Technical Support, you must gather some critical information for the technical support engineer. Preparing this information before you make the call will ensure a quicker and more efficient resolution. The technical support engineer will ask you for the following information to log a call:

- PTC Service Contract Number (SCN) to verify your entitlement to receive technical support. Please have the number before you contact Technical Support.
- Your name
- Your telephone number
- PTC product (module) name
- Priority of the issue (see Understanding Call Priority for more information):

Enterprise Down—A production enterprise system is down (see Process for the Enterprise Down Priority Level for more information)

Extremely Critical—Represents a work stoppage that does not affect the entire enterprise

Critical—Work is severely impacted and a solution must be found quickly

Urgent—Work impacted but not significantly

Not Critical—Work is slightly impacted but can easily be worked around

- The results of the pre-call checklist

For a follow up of a logged call, give the assigned call number, for example, C1234567, to the Technical Support operator. Refer to that number on any correspondence to the Technical Support department about the call. You can also track the status of a call or contact a technical support engineer by adding a comment to a call using Call Tracker on the PTC Web site.

Opening and Tracking a Call to Technical Support

If you complete the pre-call checklist and determine that you need to contact PTC Technical Support, you can do so on the Web, by telephone, fax, or e-mail, as described in the following sections. In each case, Technical Support will issue you a unique call number in the format C#####, for example, C1234567, that you can later use to track the resolution of your issue.

Opening Calls on the PTC Web Site

You can use the PTC Web site to open Technical Support calls 24 hours a day, 7 days a week, by using the Call Logger tool located in the Technical Support section of the PTC Web site. This application provides easy-to-follow instructions and returns a call number immediately upon submission of all information.

Tracking Calls on the PTC Web Site

You can also use the PTC Web site to track your Technical Support calls by using Call Tracker located in the Technical Support page of the PTC Web site. You can view calls placed by your company to PTC Technical Support through this application. Call Tracker provides searching, tracking, and sorting capabilities. You can also add your own comments to a call. When comments are added, the technical support engineer assigned to your call is automatically notified.

Opening Calls by Telephone or Fax

To contact PTC Technical Support by telephone, see the list of phone numbers in the Worldwide Contact Information section at the back of this guide.

Opening Calls by E-Mail

Send e-mail to cs_ptc@ptc.com, with `copen_format` as the subject. PTC Technical Support will e-mail you a template and detailed information about how to open calls by e-mail. See the Technical Support page of the PTC Web site at www.ptc.com/cs/doc/copen.htm for the proper format for opening calls by e-mail. This page includes a template to download. In response to your message, your call will be routed according to your geographic location.

Processing Your Technical Support Calls

When you call PTC Technical Support at a number at the end of this guide, your call is routed to the appropriate automated call distribution (ACD) phone queue. Each queue corresponds to a specific PTC product or functionality. For details on call routing for Technical Support, see the diagrams under Telephone System Menu Maps Worldwide at www.ptc.com/cs/doc/cont_sup.htm.

If a technical support engineer is available, the system immediately routes your call to that engineer. If an engineer is not available within two to three minutes, the system gives you the following options:

- Continue to wait for the next available engineer
- Leave a voice mail message
- Speak directly with an operator

If you leave a message either on voice mail or with an operator, a technical support engineer will return your call within two business hours.

The Technical Support phone system is designed to provide you with flexible options and to let you speak directly with a technical support engineer as quickly as possible.

Resolving Your Question

A PTC technical support engineer will work with you to resolve your question to your satisfaction. Have the results of the pre-call checklist ready so that the engineer can provide you with efficient service. See

Preparing for Your Call to Technical Support in this chapter for more information about the pre-call checklist. Be prepared to try to replicate the issue.

When Technical Support resolves your question, and you agree to the resolution, the status of the call is changed to “Resolved.” You can use a resolved call number for reference purposes. If you want to reopen a call that has been resolved, you can do so via the Web (by adding a comment) or by calling Technical Support.

Note: If you have a new technical issue to report, do not refer to a resolved call number. Instead, follow the steps for contacting Technical Support to open a new call. See *Opening and Tracking a Call to Technical Support* earlier in this chapter.

If the technical support engineer determines that more specific data is necessary to resolve your question, follow the appropriate procedure listed in *Sending the Data* in the next chapter. When Technical Support receives the additional information, they will contact you to confirm its receipt.

PTC Technical Support also provides you with the options of tracking software performance reports for issues reported by your company.

Software Performance Reports (SPR)

The technical support engineer analyzes your information and data. If the engineer detects a software issue, he or she submits an SPR. Technical Support uses SPRs to submit software issues to the PTC Software Development department for resolution. Each SPR has a unique number, for example, SPR123456, that you can use to identify the issue.

When an SPR is submitted, Technical Support assigns a severity to the SPR and notifies you of the SPR number issued for your call. Severities for SPRs are as follows:

- **Enterprise Down**—A production enterprise system is down
- **Top Priority**—Highly critical software issue that is causing a work stoppage
- **High**—Critical software issue that affects immediate work
- **Medium**—Software issue that does not affect immediate work
- **Low**—Software issue that does not affect work

You can track the status of SPRs filed by your company using the SPR Tracker Web application located in the Technical Support section of the PTC Web site. You can view SPRs filed by your company to PTC

Technical Support with this application. The SPR Tracker enables you to search, track, and sort your SPRs.

You can track an SPR on the PTC Web site in English, French, German, Italian, or Japanese.

When an SPR is resolved, the technical support engineer will notify you and send you a software correction or will refer you to the PTC Web site for downloadable fixes.

Escalation of Issues

PTC Technical Support provides customers with multiple mechanisms for escalating technical issues. The increased priority of a call or an escalation of a call reflects the urgency of a particular issue. Technical Support uses this following information to understand the impact of a particular issue for each customer:

- **Change call priority**—Alerts the technical support engineer to the change in priority
- **Escalate this call**—Involves the technical support engineer's manager

The priority of a call is set initially when you open the call via the Call Logger. As your business needs change, you can modify the priority or escalate the call using Call Tracker or using the phone:

- **Call Tracker**—Use your PTC Account with Customer Support for interactive technical support using Web tools.
 - Click **Change call priority** and update the Priority. The support engineer assigned to your call is notified.
 - Click **Escalate this call**. The technical support engineer's manager is notified.
- **Technical Support toll-free phone numbers**—Inform the technical support engineer of the new priority or escalation. Your call will be updated appropriately.

Understanding Call Priority

The priority of a call represents the importance or urgency of resolving the issue. A priority is assigned upon call initiation. This value can be updated at any point to reflect a change in the urgency of a resolution. The following outlines the definition of each priority and highlights the steps taken by the Technical Support engineer:

Enterprise Down—A production enterprise system is down.

- Technical Support management is notified when call is initiated or priority is increased.
- Technical Support works continuously with customer until resolution is reached or alternate technique is found.
- Development resources are contacted to assist with the troubleshooting process and, if necessary, provide a software update
- Evaluation is completed to determine if 24-hour support is required. Support is in English only.
- Formal management review is completed every 24 hours.
- If necessary, a Software Performance Report is filed to report a software defect.

Extremely Critical—A work stoppage that does not affect the entire enterprise has occurred.

- Issue is prioritized appropriately with the Technical Support contact.
- Technical Support works with customer to reach a resolution or alternate technique to eliminate the work stoppage as quickly as possible.
- Status updates are provided to customer on a regular basis.
- If necessary, a Software Performance Report is filed to report a software defect.

Critical—Work is severely impacted and a solution must be found quickly.

- Technical Support works with customer to reach a resolution or alternate technique as quickly as possible.
- Status updates are provided to customer on a regular basis.
- If necessary, a Software Performance Report is filed to report a software defect.

Urgent—Work is impacted but not significantly.

- Technical Support works with customer to reach a resolution or alternate technique.
- Technical Support works with customer to set appropriate status update timeframes.

- If necessary, a Software Performance Report is filed to report a software defect.

Not Critical—Work is slightly impacted but can easily be worked around.

- Technical Support works with customer to reach a resolution or alternate technique.
- If necessary, a Software Performance Report is filed to report a software defect.

Process for the Enterprise Down Priority Level

Use the Enterprise Down (E-Down) priority level with care so that valid situations get the necessary resources. The Enterprise Down call priority is reserved for PTC maintenance-paying Enterprise customers with PTC software in a production environment. When all production work has stopped and cannot reasonably continue, the situation qualifies as a business emergency. E-Down categories for this priority level follow:

- A majority of end users cannot access PTC server software.
- The Enterprise Server remains unresponsive or exits repeatedly causing unacceptable or indefinite delays.
- Suppliers cannot access PTC software for sustained periods
- End user activities result in a productivity drop of 80% or greater
- Server performance for the Enterprise results in a productivity drop of 80 percent or greater

Protocol in Business Emergencies

In a business emergency, PTC encourages you to immediately call the Support Line and speak with a Technical Support representative. Request Enterprise Down (E-Down) attention. PTC Technical Support will work 24x7 until they can start a working system or as long as they continue making useful progress.

During this emergency period, you must provide a contact, either on site or by pager, to assist with data gathering, testing, and applying fixes. This technical contact must speak English and must be knowledgeable with PTC software and the production environment to help resolve system issues.

Information Required for the Enterprise Down Priority Level

Whether you speak immediately with a Technical Support representative or use Call Tracker, you are asked the following questions for Enterprise Down (E-Down) priority level:

- What is the business justification? Choose one of the E-Down categories from the list of above.
- How many total users are on this production system?
- How many of those users are impacted by this problem?
- What actions have been taken to bring the system back online? Include any new or changed contact information since the opening of the call.
- How long has the system been down?

Calling Technical Support immediately is the preferred approach to an E-Down condition. You can use Call Tracker to set the E-Down priority level *after* you open the call via the Call Logger but not while you initially log the call.

Escalate a Call to Technical Support Management

A call can be escalated to a Technical Support Manager if necessary. A manager will become directly involved in ensuring that the appropriate resources are working towards issue resolution. This may include the escalation of a Software Performance Report. A call can be escalated by phone or Web through one of the following methods:

- Web-based Call Tracker—The direct manager of the support engineer assigned to your call is notified automatically when the call is escalated in Call Tracker. You cannot set the escalation status while opening the call via Call Logger. However, you can update the status in Call Tracker by clicking Escalate this call. For any subsequent escalation request, you must contact Technical Support by one of the remaining escalation methods.
- Technical Support Feedback Line toll-free numbers
- Technical Support Feedback form at www.ptc.com/support/feedback/ts.htm
- Technical Support toll-free numbers

In each case, reference your Technical Support call number and you will be directed to the appropriate Technical Support Manager.

If calling the Feedback or Technical Support toll-free phone numbers, use the following procedure:

1. Upon entering the automated phone tree, select 0 (zero) to speak to a Technical Support Administrator.
2. Inform the Technical Support Administrator that you want to escalate a technical issue and provide the associated Technical Support call number. The Technical Support Administrator will transfer you to the appropriate manager.
3. If the manager is unavailable, the administrator will seek out a Technical Support Manager to address your escalation.

Understanding Escalation Levels

A call can be escalated to Technical Support Management if necessary. See the previous section for details on how to escalate a call. You are encouraged to escalate your issue to ensure the proper level of attention and resources. There are three levels of escalation within Technical Support.

Escalation Level 1 (M1)

- The call is escalated to the Technical Support Engineer's direct supervisor.
- The Technical Support Manager will ensure that proper resources are applied to the call. By escalating a call, you are indicating that the call requires Technical Support management attention. A Technical Support Manager will ensure that you are contacted about the escalation.

Escalation Level 2 (M2)

- If you are not satisfied with the response for an issue, escalate your call a second time. The call is escalated to a second level of Technical Support management.
- The Technical Support manager will work with the Technical Support Engineer and engineer's supervisor to ensure that proper resources are applied to call.
- If necessary, a Software Performance Report will be escalated.

Escalation Level 3 (M3)

- If the issue requires higher management involvement, escalate the call again to a third level of Technical Support management.
- The Technical Support Manager will work with direct reports to ensure proper resources are applied.

- If necessary, a Software Performance Report will be further escalated.

Enhancements for Products

An enhancement is an idea or suggestion that PTC can evaluate for possible inclusion in future product releases. PTC appreciates your suggestions for software enhancements.

You may submit an enhancement to PTC or track the progress of a previously submitted enhancement using Web-based tools that are similar to, but different from, those used to contact PTC Technical Support.

Enhancements are automatically routed to the appropriate Product Management personnel for evaluation and consideration. PTC Technical Support does not handle or track enhancement requests.

In general, each new enhancement request is initially evaluated within approximately two or three weeks. As a result of this initial evaluation, an enhancement request may be categorized as:

- **Implemented**—This enhancement was implemented in release (number) of product (name).
- **Need More Info**—PTC needs the following additional information to consider this enhancement:
- **No Plans**—PTC does not plan to implement this enhancement at this time
- **Being Considered**—PTC will consider this enhancement for inclusion in future software releases.
- **Planned**—PTC is currently planning to include this enhancement in the next software release.

Note: Plans often change for a variety of reasons. Thus, although PTC may plan to include a specific enhancement in a specific software release, this is not a commitment to implement this enhancement in any release of any product. Only enhancements with the category of “Implemented” are considered commitments by PTC.

After the initial evaluation of an enhancement request has been completed, all enhancements in the “Being Considered” category are evaluated for inclusion in each subsequent software release. However, since PTC generally provides software releases approximately once per year, the implementation of a specific enhancement can require an extended period of time.

If you want to emphasize the importance of a specific enhancement request, you should contact your sales representative.

Submitting an Enhancement Request on the PTC Web Site

You can use the PTC Web site to submit enhancement requests 24 hours a day, 7 days a week, by using the PTC Enhancement Request Logger located in the Technical Support section of the PTC Web site. This application provides easy-to-follow instructions and immediately returns an enhancement tracking number upon submission of all information. You can submit enhancements only in English at this time.

Tracking Enhancement Requests on the PTC Web Site

You can also use the PTC Web site to track the progress of your enhancement request by using the PTC Enhancement Request Logger located in the Technical Support section of the PTC Web site. You can view enhancement requests placed by your company through this application. The PTC Enhancement Request Logger provides searching, tracking, and sorting capabilities. You can also add your own comments or any requested information to an enhancement request. When comments are added, the appropriate Product Manager is automatically notified.

6

Sending Additional Data to Technical Support

Sometimes the technical support engineer requests additional data that can help PTC Technical Support replicate and solve your issue. This chapter describes the procedures to gather this data and send it to PTC Technical Support in the most efficient and effective way.

Topic	Page
Gathering the Required Data.....	6-2
Sending Multiple Files.....	6-11
Securing Data for Transfer.....	6-12
Sending the Data.....	6-14

Gathering the Required Data

The following sections explain how to gather the data you need to send to PTC Technical Support to successfully resolve your issues. Read the section or sections that refer to the software involved in your question. The sections are arranged alphabetically for your convenience.

Arbortext

Application files of various types help Technical Support reproduce and resolve a problem with Arbortext products.

- **Arbortext Editor, Arbortext Styler, Arbortext Architect (Text Editor), and Arbortext PE Interactive (formerly E3 Interactive)**—To save your application files, open the source document, and then select **Tools > Save Application**. Zip the files.

When using release 4.3.1 and later, enter the `appsave` command in the command window. When using release 4.3 and earlier, enter the `bugsave` command.

The files saved include the document instance, style sheet, document type, custom programming files, and environment information. For a nonstandard customization, ensure that all required files are in the `appsave` folder.

For details on using the `appsave` command, go to the **Help-Topics** menu, click the **Search** tab, and type `appsave` in the text box.

- **Arbortext Publishing Engine, Arbortext Contributor, Arbortext Dynamic Link Manager**—Technical Support will work with you to obtain application files on the Arbortext Publishing Engine server.
- **Arbortext Advanced Print Publisher (formerly 3B2)**—Prepare a scaled-down, *.3d file that exhibits the problem. Zip the file with all its referenced graphics.

CADDS, Optegra, and DIMENSION III

Collect the CADDS, Optegra, or DIMENSION III database files as directed by the technical support engineer handling your call.

DIVISION ProductView

For DIVISION ProductView, have the following information ready to help solve your problem:

- `agent.ini` file from each folder under `<Graphics Server loadpoint>/ObjectAdapters`.
- Events folder contents in `<Graphics Server loadpoint>`.
- `worker.log` file found on the CADWorker machine in the worker directory as referenced in the `<Graphics Server loadpoint>/ObjectAdapters/cad/agent.ini` file. The correct location for the `worker.log` file is shown in the `host` and `exe` entries in the `agent.ini` file.
- Repeatable steps required to duplicate the problem.

You can attach the files to an e-mail and send them using the procedure described in Sending the Data in this chapter.

Electronic Design Entry (EDE)

Gather all required data for Electronic Design Entry, including subfigures and rules files, into a single directory. Use the command `schfollow` to locate the subfigures used.

FlexPLM

For FlexPLM issues, have the following information ready to help solve your problem:

- `custom.lcs.properties` file in `<Windchill loadpoint>/codebase`
- `lcs.db.properties` file in `<Windchill loadpoint>/db`
- `MethodServer.log` file in `<Windchill loadpoint>/logs`
- `LCS*.log` files in `<Windchill loadpoint>/logs` (there are several LCS log files such as `LCSQuery.log` and `LCSDB.log`)
- `localhost_LCSW_log.<DATE>.txt` file in `<Tomcat loadpoint>/logs`

If an error page opens in FlexPLM, click the link Create Support Package. This link creates a ZIP file with the log files and property files listed above along with information about the error.

Info*Engine

Have the following information ready for assistance with Info*Engine products:

- Info*Engine task, template, and JSP files—Include the actual template file, not a just link to the template file.
- Server log file—Default location:
`<Info*Engine loadpoint>\log\server.log`

- Adapter log file (adapter.log) —Include if running the adapter in a standalone configuration.
- Info*Engine properties file—Default location:
<Info*Engine loadpoint>\ie.properites
- Enterprise access client and method source code (EBAI adapter only).

InterComm

Application files of various types help Technical Support reproduce and resolve a problem with Intercom products.

InterComm EDACompare

For assistance with InterComm EDACompare, have the following information ready:

- For issues with Windchill integration, please refer to the Windchill sections of this document.
- For issues with the standalone configuration or if you are sure that it is not a Windchill issue, have the following information available:
 - Native design file or files
 - Configuration Set used for the comparison (If no configuration set was used, create one that mirrors the comparison that you performed.)
 - Report file
 - Configuration (.properties) file and its location
 - JAVA (JRE) version
 - Browser and version
 - Log4j log file

InterComm EDAConduit

For assistance with InterComm EDAConduit, have the following information available:

- Native design file
- Configuration settings for the specific conduit
- Log4j log file

- Resulting .eda file or resulting IFF file (if using an IFF converter)

If the issue is with the display of data in InterComm Expert, also include the required data specified below for InterComm Expert.

InterComm Expert

For assistance with InterComm Expert, have the following information available:

- For Data Display issues:
 - Native design file
 - Resulting .eda file (if applicable)
 - An annotation/bookmark file indicating the issue
- For InterComm Expert operation issues:
 - Registry settings for InterComm Expert
 - Environment variables
 - License settings
 - ICMcontrolfile.txt

Mathcad

Follow these steps to prepare Mathcad information for technical assistance:

1. Save your Mathcad worksheet (.xmcd).
2. Include your version of Mathcad, and the steps to reproduce your problem.
3. Compress the worksheet to avoid corruption during transfer. Use the call number for the ZIP file name (example: C123456.zip).

Pro/ENGINEER

Follow these steps to save the latest copy of your Pro/ENGINEER database objects and create a trail file that captures your issue.

1. Create a new directory where you will save a copy of your Pro/ENGINEER objects. Give the directory a name that corresponds to your Technical Support call number, for example, C1234567.
2. Retrieve the Pro/ENGINEER part, assembly, or drawing with which you have an issue.

3. Click **File > Backup** and enter the name of the new directory you created in step 1. This creates a copy of the Pro/ENGINEER object or objects that Technical Support will use to answer your question. Always back up the highest level that the issue affects. For example, if the issue affects drawings, back up the drawing. This will automatically back up the model, part, or assembly as well.
4. Exit Pro/ENGINEER.
5. Change directory to the directory created in step 1.
6. If you want to save the trail file to a user-defined directory, use the `config.pro` option `trail_dir`.
7. Restart Pro/ENGINEER.
8. Create a new trail file by choosing the minimum number of menu options needed to recreate the issue.
9. Copy the most recent trail file that was just created (the `trail.txt` file with the greatest numerical suffix) to `C#####.txt` in the directory created in step 1. (C##### is your Technical Support call number, for example, C1234567.)
10. Exit Pro/ENGINEER when you are finished.
11. To verify that the trail file contains your issue, run it as follows:
 - a. Start Pro/ENGINEER.
 - b. Click **Utilities > Play Trail/Training File**.
 - c. Enter the name of the trail file, for example, `C#####.txt`.

When you have finished preparing your data, see *Sending the Data* in this chapter.

Pro/INTRALINK

Follow these steps to create TAR or ZIP files of vault locations for Pro/INTRALINK files associated with your issue.

1. Log on to the Pro/INTRALINK data server as the user who installed the data server (usually user `oracle` on UNIX platforms or `administrator` on Windows platforms).
2. Create a data directory in which to store data for this issue. Usually the directory is named using the associated call number.

3. Ensure that all users are currently logged out of Pro/INTRALINK, but keep the data server running.
4. Create a dump file of the data server by running the script `ilink_export` as follows:

For UNIX:

```
<data server loadpoint>/intraLink/export/ilink_export
```

When prompted for the name of the dump file, include the path to the data directory created in step 2 so that the dump file will be created in the data directory.

For Windows:

```
<data server loadpoint>\intraLink\export\ilink_export  
manager\<full_path_to_dir\dumpname.dmp>
```

5. Create a TAR or ZIP file of each Vault location and place those files in the data directory created in step 2.

When you have finished, see *Sending the Data* in this chapter.

Pro/ENGINEER Simulation (formerly Mechanica)

Follow these steps to prepare files for Pro/ENGINEER Structural and Thermal Simulation, which includes Mechanica, before sending them to PTC for consideration:

1. Create a new directory where you will save a copy of all necessary files associated with your question or issue.
2. Copy the following files and directories into this new directory, using all circumstances that apply:
 - If the problem occurs while you are working in integrated mode with Pro/ENGINEER, copy the Pro/ENGINEER part or assembly files, as well as the Simulation files, where applicable.
 - If the problem occurs during the model definition phase in independent mode and the original part or assembly is not associated with a Pro/ENGINEER model, copy only the Simulation database file.
 - If the problem occurs while you are running an analysis or design study, copy the entire subdirectory created for the analysis or design study, as well as the files identified in the two previous bulleted sections.

Following the previous steps automatically creates a trail file. When you have finished, see *Sending the Data* in this chapter.

Pro/ENGINEER Routed Systems Designer

To prepare a Routed Systems Designer file for PTC, use one of the following procedures to create a design or a package file:

To send the complete design as an `.rsd` file:

1. Create a new directory where you will save a copy of all necessary files associated with your question or issue.
2. Click **File > Open Design** to open the design.
3. Click **File > Pack Design** to create a design file.
4. Set the **Pack Directory** folder. The `.rsd` file of the design will be created in this folder.
5. Using Windows Explorer, create a folder with the call number (example C123456), and place this `.rsd` file into that folder.
6. Zip the entire folder to reduce the file size and avoid corruption during transfer.

To send the package file of the catalog or particular design sheets as a `.pkg` file:

1. Create a new directory where you will save a copy of all necessary files associated with your question or issue.
2. Click **File > Open Design** to open the design.
3. Click **File > Export > Package**. Using the Arrow button, move required items to the right side **Export Package Contents** box.
4. Click **Browse** and set the directory into which to export the package file.
5. Enter the name for the package file.
6. Click **OK**, and then click **Export**.
7. Using Windows Explorer, create a folder with the call number (example C123456), and place this `.pkg` file into that folder.
8. Zip the entire folder to reduce the file size and avoid corruption during transfer.

Windchill Import and Export

For issues regarding bulk loading, workflow import/export, lifecycle import/export, or sourcing import/export with Windchill, have the following information ready to help solve your problem:

- csvmapfile.txt file in <Windchill loadpoint>/loadfiles
- Any other .csv file related to the issue

The files must be packed in a TAR or ZIP file before they can be attached to an e-mail and sent using the procedure described in the section Sending the Data in this chapter.

Windchill Information Modeler

For Windchill Information Modeler issues, create an archive of the following files to help solve your problem:

- **Object model files**—Include the .mdl file and the corresponding .cat files. The object model files are normally found under the <Windchill loadpoint>/src directory.
- **Java source files**—Include source files created by the System Generator and any supporting Java source files you may have created (GUI and so forth.). These files are also normally found under the <Windchill loadpoint>/src directory.
- **SQL files**—Include any .sql files created by the system generator for your object model. These files are typically found in the <Windchill loadpoint>/db/sql directory.

To create this archive, use one of the following methods:

- **On Windows**—Create a ZIP file containing the files listed in the previous section. Be sure to include folder information relative to the top level of your Windchill load point.

Note: The path within the ZIP file should not include the name of the Windchill installation directory. For example, files in the src directory should contain the path src/, not Windchill/src/.

- **On UNIX**—Create a TAR archive containing the files listed previously.

Note: The files in the TAR archive must be specified without the name of the Windchill installation directory.

Windchill Installation and Configuration

For Windchill installation and configuration issues, have the following information ready to help solve your problem.

- wt.properties file in <Windchill loadpoint>/codebase
- db.properties file in <Windchill loadpoint>/db
- MethodServer.log file in <Windchill loadpoint>/logs
- Environment variable listing—Generate a text file containing the current environment variable settings using the command for the appropriate platform:
 - Windows (in a Command Prompt window):

```
set > environment.txt
```
 - UNIX (in a shell window):

```
env > environment.txt
```
- Output from the Java console—Open the plug-in console window.
- Repeat the steps required to duplicate the problem.

You can attach the files to an e-mail and send them using the procedure described in Sending the Data in this chapter.

Windchill Visualization

For Windchill Visualization issues, have the following information ready to help solve your problem:

- wvs.properties file in <Windchill loadpoint>/codebase
- wt.properties file in <Windchill loadpoint>/codebase
- agent.ini file in <Windchill loadpoint>/codebase
- cadagent folder contents in <Windchill loadpoint>/logs
- worker.log file found on the CADWorker machine in the worker directory as referenced in the agent.ini file. As listed in the agent.ini file, reference the host and .exe entries to find the correct location for the worker.log file.
- Repeatable steps required to duplicate the problem.

You can attach the files to an e-mail and send them using the procedure described in Sending the Data in this chapter.

Sending Multiple Files

After you complete the appropriate steps listed in the section Gathering the Required Data, follow the steps listed here to send multiple files to Technical Support.

On a UNIX Platform

Complete the steps outlined in the following table to send multiple files on a UNIX platform to Technical Support.

Step	Action	Method
1	Gather all required data into a single directory (called <code>data_dir</code> in the next two steps).	Follow the procedures outlined in Gathering the Required Data in this chapter.
2	Create a text file (here called README) in the directory that contains your call number and all pertinent information.	<code>vi <data_dir/README></code>
3	Use the TAR command to create a single file.	<code>tar cvf tar_file <data_dir></code>
4	Compress the TAR file.	<code>Compress tar_file</code>
5	Encode the compressed file, using your call number as the output file name.	<code>Encode tar_file.Z tar_file.Z</code> > C##### (one command, one line)
6	Send the file to PTC.	Send by e-mail, FTP, or tape, using the appropriate technique. See Sending the Data in this chapter.

On a Windows Platform

Complete the steps outlined in the following table to send multiple files on a Windows platform to Technical Support.

Step	Action	Method
1	Copy required data to a single directory.	<code>copy <files> data_dir</code> or use the File Manager
2	In the directory you made in step 1, create a file named README	<code>notepad data_dir/README</code>

Step	Action	Method
	that has the call number and all pertinent information.	
3	Use the PKZIP command or WinZip to create a single file.	PKZIP zip_file ptc_dir WinZip
4	Send the file to PTC.	Send by e-mail, FTP, floppy disk, Zip disk, CD, or tape in a format available both at the your site and at PTC, using the appropriate technique. See Sending the Data in this chapter.

Securing Data for Transfer

The handling of Non-Disclosure Agreements (NDA) and International Traffic in Arms Regulations (ITAR) and using PGP encryption with your data is described in this section.

Handling NDA Data

Sometimes you may have confidential or proprietary data necessary to investigate and resolve a technical problem. To send such proprietary data to PTC, follow these steps:

1. Tell the technical support engineer that you will be providing proprietary data that should be covered by a Non-Disclosure Agreement (NDA).

The technical support engineer will send you a Confidential Information Transmittal Record (CITR) form to fill out. If no NDA is in effect, you will receive a standard NDA to execute and send to PTC prior to sending the CITR and the data.

2. Use the CITR form to list the specific data files that are covered by the NDA. This is required.

PTC will also sign the completed form, as a commitment to safeguard your data according to the requirements of the NDA.

3. Transfer the NDA data to PTC using one of the methods described in the Sending the Data section. Agree upon the transfer method with the assigned technical support engineer and in accordance with your company's data transfer policies

When the issue is resolved, PTC deletes the NDA data from any systems where it was stored and destroys or returns any media (such as CDs or tapes) containing the data at your option. (Backup tapes for systems archival or maintenance purposes may be maintained).

Handling ITAR Data

Many companies in defense-related businesses must follow the U.S. International Traffic in Arms Regulations (ITAR). If you need to send data to PTC that is covered by ITAR, follow these steps:

1. Inform the technical support engineer that you will be providing ITAR data.

PTC will then ensure that the technical support engineer assigned to handle your data (and anyone else at PTC who will handle your data) is a U.S. citizen or permanent resident. PTC will assign your call to another engineer, if necessary, to satisfy this requirement. PTC will also ensure that your data will not be exported outside the United States.

The assigned technical support engineer will then send you an Export Controlled Data Transmittal (ECDT) form to fill out.

2. Use this form to list the specific data files that are covered by ITAR. This step is required.

PTC will also sign the completed form, as a commitment to safeguard your data according to the ITAR requirements.

3. Transfer the ITAR data to PTC using one of the methods described in the Sending the Data section. Agree upon the transfer method with the assigned technical support engineer and in accordance with your company's data transfer policies.

When the issue is resolved, PTC deletes the ITAR data from any systems where it was stored and destroys or returns any media (such as CDs or tapes) containing the data at your option. (System backup tapes used for systems archival or maintenance purposes may be maintained).

24-Hour Support Process for ITAR Data-Specific Issues

For calls logged after U.S. business hours or for any other 24-hour support issues including Enterprise Down, Technical Support cannot guarantee that personnel eligible to handle ITAR data will be available. Technical Support will make a best effort to continue 24-hour support by troubleshooting the issue without using the ITAR data.

Encrypting Data Using PGP

PTC provides a secure way to transfer data to Technical Support. PGP has been chosen as the encryption tool due to its high level of security and support for a wide variety of platforms. Follow these steps to set up PGP and use it for secure data transfers.

Install PGP

Obtain and install a copy of PGP version 2.6 or later. For more information on obtaining PGP, visit www.pgp.com. All of the examples that follow are for running PGP 2.6.2 on a UNIX platform.

Add the PTC Technical Support Public Key to Your Keyring

For compatibility with different versions of PGP, PTC Technical Support created two public keys which were created on Jan 31, 2001 and have no expiration date. Use the key that works best with the version of PGP installed at your site.

- 2048 bit RSA: www.ptc.com/cs/doc/pgp2048RSA.txt
- 2048 bit DH/DSS: www.ptc.com/cs/doc/pgp2048DH/DSS.txt

To add the key, click on the appropriate link and save the key to a temporary text file named `ptckey.ptc`. Then run the following command to add the key to the public keyring: `pgp -ja ptckey.txt`.

Encrypt the Data

Before encryption, the data must be assembled into a single file. The data file must end in `.pgp` or `.asc` for proper decryption. PGP, by default, will compress the file while encrypting. "PTC Technical Support" in the command line tells PGP who is the recipient. For more information on using PGP, consult the PGP user manuals.

To create an encrypted file, type one of the following commands.

- `pgp -e C1234567.tar "PTC Technical Support"`
This will create a binary file called `C1234567.tar.pgp`.
- `pgp -eat C1234567.tar "PTC Technical Support"`
This will create an ascii file called `C1234567.tar.asc`.

Sending the Data

If you are sending multiple files, remember to create a single directory and send that one directory. See Sending Multiple Files in this chapter

for more information. The previous section explains the handling of NDA and ITAR data. You can send the data on disk or tape media or you can send the data using the PTC File Transfer Protocol (FTP) server or the PTC Secure FTP server.

Sending the Data on Disk or Tape Media

To send data on disk or tape media, use the following procedure:

1. Complete the steps in Gathering the Required Data and copy the requested information to the media. If tape media is used, ensure that the tape format is available both at your site and at PTC.
2. Obtain a PTC call-tracking number for your issue (see Opening and Tracking a Call to Technical Support in the previous chapter). Write the call-tracking number on the media label.
3. Mail the media to the support center in your region. Ask the technical support engineer you are working with for the address of the appropriate support center. If there is no assigned technical support engineer, find the support center address at www.ptc.com/appserver/wcms/offices/search.jsp.

Note: Media (disks, CDs, and tapes) will not be returned. Keep a copy of the data for your own reference.

Sending the Data Using the PTC File Transfer Protocol (FTP) Server

The PTC FTP server includes a Technical Support area, which you can use to transfer files. (Information on using the secure server follows later in this chapter.) This area is configured with write-only privileges. Connect to the PTC FTP server using an FTP client program in one of the following ways:

- From the FTP site
- From the graphical user interface
- From your Web browser

Requirements for Data You Send to the PTC FTP Site

Whenever you use FTP to send data to the PTC Technical Support area, make sure that your data meets the following requirements:

- The file name must be an open, valid Technical Support call number. For example, the file name must be in the form C#####.*, where C##### is an open Technical Support call number and the asterisk (*) indicates any file extension, such as .tar, .Z, or .zip.

- Data must be in a single-file format. If you want to send multiple files, you must incorporate them into single-file format. See [Sending Multiple Files](#) in this chapter for more information.

Connecting to the PTC FTP Server

The PTC FTP server is located at <ftp://ftp.ptc.com>. (To use a secure FTP server, follow the information later in this chapter.) Instructions for using the FTP server follow.

From Command Line

If you are accessing the PTC FTP server from a command-line program:

1. Type `ftp ftp.ptc.com` at a command-line prompt.
2. When the username is requested, type `cs`.
3. When the password is requested, type `cs`.
4. Change directories to reach the directory where your file is stored. Enter `cd <directory_name>`.
5. Make sure you are sending the information using binary as the transfer type. At the FTP prompt, type `binary`.
6. Use the `put` command to upload the file at the FTP prompt. For example, to upload `C1234567.Z`, type `put C1234567.Z`.
7. Exit from FTP by typing `bye`.

From FTP Client with Graphical User Interface

If you are using an FTP client program with a graphical user interface, connect to <ftp://ftp.ptc.com> with a user name of `cs` and a password of `cs`. Make sure that this program will transfer the file using binary as the transfer type before sending the file.

From Web Browser

If you are accessing the PTC FTP server from your Web browser, use the following address: <ftp://cs:cs@ftp.ptc.com>. After the page finishes loading, you are ready to upload your file or file.

- Netscape 4.x and later:
 - Select **File > Upload File**.
 - Select your file and select **Open**.
- Microsoft Internet Explorer 4.x and later:
 - Drag the files from Windows Explorer into Internet Explorer.

Note: Internet Explorer does not display the FTP server banner messages.

Sending Data Using the PTC Secure FTP Server

The PTC secure FTP server is located at <ftp://secureftp.ptc.com>. You can connect to the server via a secure FTP client, such as Core FTP Lite (www.coreftp.com) See the previous section Requirements for Data You Send to the PTC FTP Site before you proceed.

Setting Up the a Secure FTP Client

Make sure to select the following options in the software for your secure FTP client:

- AUTH SSL
- SSL Listings
- SSL Transfer
- OpenSSL

Connecting to the PTC Secure FTP Server

The PTC secure FTP server is located at <ftp://secureftp.ptc.com>. The general process for using an FTP secure server follow:

1. Start your secure FTP client software.
2. Provide the following information:
 - **Address**—`ftp://secureftp.ptc.com`
 - **Login**—`cs`
 - **Password**—`cs`
 - **Port**—`21`
3. Upload the file. An example file name is `C1234567.tar.gz`.

Sending Data by E-Mail

To send your data related to an existing open PTC call to Technical Support via e-mail, complete the following steps:

Note: If you do not have a call number, you can obtain one by contacting PTC Technical Support. See Preparing for Your Call to Technical Support in the previous chapter for more information on preparing for your call to Technical Support.

1. Compose your e-mail message. Include the following information:

- Description of your issue
 - Priority level
 - Person at your site whom PTC should contact to request more information or to communicate a resolution
 - List the files you are including in the e-mail and document the steps you followed to prepare data for sending.
2. If you are sending multiple files or PTC database objects such as parts, drawings, design studies, and so forth, gather the required data and create a single file by using the procedure outlined in the section Gathering the Required Data in this chapter. Include the file in the message as an attachment.
 3. Send the e-mail to cs_ptc@ptc.com and specify your call number as the subject of the e-mail message with the single data file attached.

When the data is received, the technical support engineer assigned to your call is notified automatically.

Whenever you send data to PTC by e-mail, make sure you satisfy the following requirements:

- PTC Technical Support can accept e-mail only if the call number is currently open in the Technical Support call database. The call number must be in the form C#####, for example, C1234567.
- The size of the e-mail file you send must not exceed 4 MB. If it exceeds 4 MB, PTC will return it to you.

Be aware that some route-through Internet modes might place additional limitations on the amount of data you can pass through them.

Sending Data Using Call Logger and Call Tracker

Complete the following steps to use Call Logger and Call Tracker to upload a file for Technical Support to review.

1. Enter a description for the issue related to the file you want to upload. (255 characters maximum)
2. Click **Launch File Upload Tool** or **Begin Upload** to select the file. Limit the file size to a maximum of 10 MB.

Note: When the data is received, the technical support engineer assigned to your call is notified automatically.

7

Windchill Solutions Technical Support Guidelines

PTC Technical Support provides guidelines for customizing and implementing Windchill Solutions. This chapter describes the requirements your Windchill Solution customization must meet to be supported.

Topic	Page
Overview	7-2
Supported Configurations.....	7-4
Support for Windchill Solutions in Virtual Environments	7-4
Supported Windchill Solution Releases.....	7-5
Supported and Nonsupported Usage of the API	7-8
Support of Third-Party Products.....	7-9
Support for PTC PLM On Demand	7-15
Windchill Maintenance and Patches	7-16
FlexPLM Patches	7-17

Overview

Windchill Solutions offers a highly collaborative, fully customized environment in which to get your product to market faster and more efficiently. Because customization is a key element of Windchill Solutions, you need guidelines on how to design and implement your customization more effectively.

Another important aspect of Windchill Solutions is their interoperability with several third-party products. PTC Technical Support supports the use of these products to a limited extent when providing support for Windchill Solutions.

License Agreement and Legal Obligations

PTC contractual support obligations, if any, are solely as set forth in the applicable license agreement between PTC and its customer.

PTC Technical Support provides only discretionary support for customized implementations of Windchill Solutions. Although the guidelines in this chapter set forth current practices, nothing in these guidelines shall be construed or deemed to impose any contractual or other legal obligation on PTC.

Customization

You can customize your deployment of a Windchill Solution to best suit your needs. You can create an infinite number of customizations for Windchill Solutions, but Technical Support cannot support each unique customization. By following the guidelines in this chapter, you can help ensure that PTC Technical Support can support your customization.

Using the Customization Toolkit

Windchill Solutions are shipped with a large customization toolkit. This toolkit consists of a Java Application Programming Interface (API) and associated tools, which include the following items:

- Java source files
- JavaDoc documentation
- Rational Rose object models

Not all customizations, even if technically possible using these resources, can be supported. Other Windchill Solutions offer lighter customization capabilities. Many of the customization guidelines described in this chapter also apply to lightweight customization.

Requirements for Customization

Individuals or groups customizing Windchill Solutions receive support only if they follow the guidelines described in this chapter. In particular, customizations employing the following practices are not supported, and Technical Support reserves the right to deny assistance under the following circumstances:

- Use of unsupported APIs
- Use of modified out-of-the-box classes or new classes that result from decompiling code
- Renaming of classes
- Modification of classes
- Recompile of classes

Support of End Users

Support for production systems is given only to the designated contacts who are listed in the support contract with PTC (See the PTC Customer Agreement for License Products.). These contacts must technically understand the customization thoroughly enough to work with Technical Support to ensure successful and timely resolution of customization issues.

PTC will not provide support to end users for any system in production. Therefore, end users of Windchill Solutions must contact their local Windchill Solution Administrator. The Windchill Solution Administrator can then contact Technical Support for assistance in resolving any issues related to the core Windchill Solution software.

Each designated contact is responsible for dealing with end-user issues, as well as with software errors. If you suspect that an issue or software error is related not to the customization but to the Windchill Solution product itself, you can contact Technical Support. Whenever contacting Technical Support, you must be able to clearly demonstrate why the issue is related only to your Windchill Solution, and not to the customization. You must be able to demonstrate the issue using an out-of-the-box Windchill Solution installation whenever possible. If this is not feasible, Technical Support may deploy your customization within PTC to confirm that the issue is Windchill Solution related. If it is, Technical Support takes the appropriate action, such as providing assistance in finding a workaround, filing a software performance report (SPR), and so forth.

Error Tracking

PTC Technical Support can track those software errors found in the core Windchill Solution software. If you choose to customize a Windchill Solution independently, then you are responsible for the maintenance support of that customization. However, Technical Support is available if assistance is required on a specific customization topic, or if an error is identified in the core product and must be submitted to PTC Research and Development.

Supported Configurations

The Windchill Solution product suite interacts with many operating systems and third-party products. PTC Quality Assurance tests and validates a given release of a Windchill Solution on many combinations of supported hardware and software platforms. A list of supported configurations is available in the release notes and under Interoperability Matrices and Compatibility Matrices on the PTC Web site at www.ptc.com/appserver/support/product/windchill.jsp. If you run a Windchill Solution on a supported configuration, you ensure that Technical Support has the same access to the supported hardware and software environments that you do. Technical Support uses the hardware and software environments to analyze and reproduce your issue. Any errors found on such a configuration are reported to Development through a software performance report (SPR) for correction in a maintenance release or major release of Windchill.

Technical Support is only provided for configurations listed in the installation guides, Read This Firsts, and the matrices found on the PTC Web site. Therefore, to ensure satisfactory support of deployed systems, refer to these product matrices before implementing your Windchill Solution or upgrading any of its components. Please contact Technical Support with any questions about supported configurations.

Recommendations to optimize configurations for Windchill server performance, including property files and configuration of backup and recovery strategies, are available from PTC Global Services and are not part of PTC Maintenance Services. Technical Support is only provided for configurations officially supported by PTC.

Support for Windchill Solutions in Virtual Environments

PTC does not explicitly test or certify the use of Windchill inside virtual environments such as VMWare, Xen, Microsoft Virtual PC, or any of the embedded UNIX virtualization technologies. You can use such

environments for Windchill deployments, but the guest operating system must be supported by Windchill. In these cases, PTC will provide technical support for Windchill in a virtual environment, but it cannot provide support or consultation on the configuration of the virtual environment or on issues that are believed to be caused by the virtual environment. PTC uses the following guidelines to determine whether an issue involving a virtual environment is supported:

- For issues directly related to Windchill products, PTC Technical Support will provide support. If PTC suspects that the virtual environment is the likely reason for the issue, you will be asked to contact the vendor of your virtualization product for assistance.
- For issues directly related to the virtual machine such as configuration and set up of the virtual environment, image size, performance, device emulation, or network emulation, PTC cannot provide technical support. You will be asked to contact the vendor of your virtualization product for assistance.

Supported Windchill Solution Releases

PTC Development supports a given release of a Windchill Solution for a limited period of time. After the support period has lapsed, any errors reported against the release are corrected only in a later release. Updated information for new releases is available from Technical Support at www.ptc.com/cs/doc/pds_calendar.pdf.

Multiple Windchill Instances

In most cases, you can run two concurrent instances of the same Windchill Solution on the same server. PTC can support Windchill Solution functionality in such an environment under the conditions described in this section.

The installation, configuration, or troubleshooting of the actual setup of a multi-Windchill instance server is the responsibility of the customer. PTC does not test and document all possible third-party product configurations running simultaneously on same server with multiple Windchill instances. It is the responsibility of each third-party vendor to determine whether it is possible or supportable to run multiple instances of their application on the same server.

PTC Technical Support assists with Windchill Solution issues (such as administration, workflow, and so on) unrelated to this multiple Windchill, single-server configuration as long as each Windchill instance is configured with its own Web server and its own servlet engine. In such cases, PTC Technical Support may require one of the Windchill Solution instances (along with its Web server and servlet engine) be shut down to isolate the problem to only one Windchill

Solution instance. If shutting down one of the Windchill Solution instances (along with its related Web server and servlet engine) eliminates the problem, then PTC Technical Support will not proceed in troubleshooting the issue. In such a case, it may be a third-party product configuration that is at fault, and PTC would be unable to identify all potential causes to such problems. You must isolate the problem to the specific third-party product and work with that vendor to find a solution.

Note:

- Runtime performance issues in a production, test, or development environment related to this configuration are not supported.
- Some third-party vendors may not support the configuration of multiple instances of their software on a single server. In such cases, PTC cannot provide any support for a system configured in this fashion.

Support of Dataloader Tools

Some Windchill Solutions provide a default dataloader for use with the demo, which is included on the Windchill Solution CD. Technical Support is provided for this tool.

As a Windchill Solution Administrator, you have dataloading needs for which you modify this default dataloader, or in some cases, create your own. As with any other customization, support is provided only for Windchill Solution APIs.

- Support is not provided for the following dataloader problems:
- Dataloader code problems unrelated to Windchill Solution APIs
- Dataloaders that do not use Windchill Solution APIs

Support of Windchill Customization

You should have significant experience with Java programming before working with Windchill Customization or developing workflow tasks in Java. Customization support is limited to the use of supported APIs that have been documented in the *Windchill Customizer's Guide*. Whether to make an unsupported API supported is at the discretion of PTC.

Support for Java Programming

Technical Support engineers will not develop code for customers, nor will they assist them in debugging or troubleshooting pure Java code.

Information Modeler

You can use Information Modeler (IM) to customize Windchill Solutions for the following tasks:

- Modeling business objects and services
- Implementing business objects and services
- Designing user interfaces

Create business objects to represent domain entities for a specific customer or application. Use services to add or change server-side business logic within the system. Both types of customization are located on the business layer (middle tier) of Windchill Solutions. Therefore, you must model your customization within Rational Rose. Technical Support provides basic assistance for these tasks.

Programming Styles

Adhere to the guidelines that are given in the *Windchill Customizer's Guide* and *Windchill Application Developer's Guide* when customizing Windchill Solutions. The customization framework and design patterns described in these documents ensure supportability and compatibility with future releases of Windchill Solutions. However, Technical Support reserves the right to deny support in cases where rules of reasonable development are violated.

Customer Source Code Examples

In some cases, you will have to submit code to Technical Support. Rather than sending the whole customization, send in an example that demonstrates the specific Information Modeler issue. Technical Support will not troubleshoot or debug large code examples (hundreds of lines).

Creation of Custom Reports

It is possible to create custom reports and SQL queries to extract information regarding objects in the Windchill system. Technical Support can provide general guidance on creating or formatting a specific report, but the actual report creation is the responsibility of the report author. Some knowledge of the Windchill data model and SQL is required to create many reports and queries. Technical Support will provide limited guidance on these topics. SPRs regarding the reporting framework are fully supported by Technical Support. Contact technical support if you believe the error you are receiving is due to an issue with the reporting framework itself. PTC may ask that you reproduce the error or incorrect results using a simple report that demonstrates the problem.

Supported and Nonsupported Usage of the API

The requirements mentioned in the previous sections are subject to the judgment of Technical Support and the urgency of the issue. In addition, you must adhere strictly to the requirements that follow to receive support for Information Modeler.

Decompiling Source Code

You can reverse-engineer Java class files into source code using tools that are widely available. Decompiling source code is legally prohibited. PTC will not support class files created by making changes to decompiled source code and replacing existing class files

Supported Languages

You must use one or more of the following languages to ensure that Technical Support can support your customization:

- Java
- HTML (including Windchill HTML templates) or JSP
- XML
- JavaScript (see JavaScript in this chapter for more information)

In many cases, other languages may be used to implement a specific function in the customization. Although using this technology is valid, Technical Support limits its support to the usage of the delivered Windchill development materials. It is your responsibility to enable Technical Support to reproduce your issue without having to install, or have specialized knowledge of, these technologies. Some examples of nonsupported customizations include:

- Using Java's JNI to integrate C code
- Launching a Perl interpreter
- Using active server pages to interact with Windchill

Modification of Existing Windchill Classes

You can modify existing Windchill classes if the corresponding source code is provided with the Windchill Customization installation. In most cases modifications only apply to resource bundles. In the case of large source files available to customers, as an Information Modeler (IM) developer, you should take care that only small, reasonable changes are made. You must fully understand the logic of the source code before

manipulating it. If you make changes that are inconsistent with the original code, support is provided only on a limited basis. Also, you should indicate any changes clearly in the source file using comments.

For example, you might want to add or delete menus for the `WTExplorerFrame` class. This action can be done easily and is a valid customization. However, if the underlying logic of the Document Explorer client has been changed completely, such as through the rewriting of large portions of the source code, Technical Support may be unable to provide support.

Windchill Classes

Although technically every class file in the Windchill codebase can be used in customization source code, usage of Windchill classes is subject to restrictions. Using a class includes accessing any field or method of that class, or creating instances of the class.

To use a class, the class must be described in the JavaDoc. The JavaDoc of every class contains a Supported API field. This entry must be set to `true` in order for the class to be supported for use within customizations. If a field or method of a class is used, the entry Supported API for this field or method must not be set to `false`. If there is no Supported API entry field or method, but the class itself is a supported API, then the field or method is considered as supported also.

Windchill Class Extensions

Extending a class is a special case of using a class. In addition, to make supported class extensions, the parent class must be indicated as extendable in the JavaDoc by the field `Extendable: true`. All requirements described in Using Windchill Classes apply to extending classes.

JavaScript

You can use JavaScript to provide better usability for HTML user interfaces. Technical Support does not address complex queries. However, it does investigate conflicts between JavaScript and Windchill if an error due to Windchill is suspected.

Support of Third-Party Products

Installing and administering a Windchill Solution involves interacting with several third-party products, such as the RetrievalWare or InStream search engine, Oracle database, Rational Rose, Web servers, and Web browsers. PTC Technical Support provides varying levels of assistance for issues related to third-party products.

Installation

Issues related to the installation of third-party products supplied by PTC are supported by PTC Technical Support. Issues related to the installation of third-party products not supplied by PTC, such as mail servers, LDAP servers, or database servers are not supported by PTC. These third-party products must operate properly before any issues concerning this product are reported to Technical Support. Please see the section Supported and Nonsupported Third-Party Issues in this chapter for issues involving specific third-party products.

Configuration

For third-party products supplied by PTC, Technical Support provides assistance with issues configuring the third-party product to operate with Windchill. In the event a configuration change to the third-party product is required, Technical Support can supply specific instructions regarding the required configuration changes. Technical Support is not available when using these products for applications other than Windchill, and such uses may be prohibited by the license agreement.

For third-party products not supplied by PTC, Technical Support provides assistance configuring the Windchill software to interact with the third-party product. Technical Support may require a configuration change to a third-party product. It is the customer's responsibility to implement these changes, and Technical Support cannot provide the instructions. For example, Technical Support may recommend a change to the configuration of an LDAP server to enable Windchill to authenticate users against this server. This change would be the customer's responsibility.

To the extent that the configurations of supported third-party platforms and applications are transparent to Windchill's operation, they are supported for use by PTC. However, PTC cannot provide guidance on advanced or atypical configurations of third-party components other than those configurations that are currently documented in Windchill's software guides. If some aspect of the advanced or atypical configuration proves not to be transparent to Windchill's operation, you may be asked to seek support from the third-party application vendor. Such configurations include but are not limited to:

- Database clustering
- DNS resolution techniques
- Firewalls

- Hardware clustering
- Load balancers
- Proxy servers
- Reverse proxy servers
- Simultaneous use of the HTTP and HTTPS protocols
- Single sign-on servers

Software Errors

Report errors in third-party products related to a Windchill Solution to Technical Support. A Software Performance Report (SPR) is opened to report the issue to Windchill Development and Product Management. For issues with the products bundled with a Windchill Solution, the error is reported to the corresponding third-party company. At that point, PTC decides how to address the issue. The result can range from a third-party fix, a correction in Windchill Solution software to accommodate the error, or a substitute product.

Supported and Nonsupported Third-Party Issues

The next tables provide a brief overview of third-party products and issues supported by Technical Support. This list includes a sampling (for the purpose of example) of supported and nonsupported tasks. Direct manipulation of Windchill data in Oracle or LDAP is not supported. Manipulate data through Windchill APIs to ensure support.

Aphelion

Issues Supported	Issues Not Supported
Installing Aphelion and configuring Info*Engine to access Aphelion	Using the Aphelion database with other applications
Aphelion backup and restore process	Configuring Aphelion replication
Creating and managing users and groups using the Windchill interface	Creating and managing users and groups with other methods that Windchill interfaces

Cognos ReportNet

Issues Supported	Issues Not Supported
Installing Cognos and enabling access to Windchill	Querying data sources other than Windchill using Cognos
Executing created reports	Customizing ReportNet software

Database Servers

Issues Supported	Issues Not Supported
Creating the database schema for a Windchill Solution	Creating a database
Making changes to a database necessary for a Windchill Solution, such as creating a tablespace	Tuning general database performance based on observing a running system
Recommending specific database settings to improve Windchill Solution performance, such as which tables or attributes are good candidates for indexes Note: For more specific database performance recommendations contact the PTC Global Services Organization	Repairing corruption of the Oracle instance, such as defective Oracle blocks
	General database administration

IDE (Integrated Development Environment)

Issues Supported	Issues Not Supported
Using a Windchill JavaBean	Creating user interfaces using non-Windchill GUI components, such as AWT and Swing
Including the Windchill codebase in input/output path	Assisting in the debugging of code

Search and Indexing Servers

Issues Supported	Issues Not Supported
Creating Windchill Solution collections or libraries for Windchill Solution servers	Adding and maintaining collections or libraries for objects outside of a Windchill Solution
Bulk loading indexes	Customizing the index to use additional features or accessing the index vendor tools or other applications
Applying indexing rules to domains	

Web Browsers

Issues Supported	Issues Not Supported
Providing basic setup assistance for interaction with a Windchill Solution, such as enabling Java or JavaScript	Using general browser settings
Enabling bootstrapping for faster loading of Java classes	Applying vendor recommended patches

Web Servers

Issues Supported	Issues Not Supported
Creating necessary aliases for a Windchill Solution	Configuring or compiling non-Windchill webserver modules (that is, mod_perl)
Applying access controls for	Configuring additional web infrastructure such as proxy servers and

Support Contracts with Third-Party Vendors

Support contracts vary with each third-party vendor. When planning your customization, set up support contracts as necessary.

- **Apache and Tomcat**—The Apache Web server and Tomcat servlet engine ship with the Windchill Solutions. These third-party products are a free and out-of-the-box Web server and servlet engine solution. To ensure the quality of these solutions, PTC tests each Windchill release with the supported versions of these products. As a further level of support for Apache, PTC strives to release updated, recompiled Apache binaries to address significant security patches reported by the Apache user community.

As PTC is not the licensor of these products, the responsibility of PTC Technical Support is limited to the interaction between Windchill and the versions of these products shipped with Windchill. If you want to customize and recompile Apache or available modules yourself and need assistance, you would get support from the Apache user community, not PTC Technical Support.

- **Convera RetrievalWare, Rational Rose, FAST InStream, Aphelion, and Cognos ReportNet**—PTC is the official licensor of these products for use with Windchill. Therefore, you must contact PTC for support issues when using these products with Windchill. PTC Technical Support is responsible for issues involving these products and for contacting the vendors' technical support organization when necessary. For Cognos ReportNet, only customers who have purchased Windchill Business Report Author capability can receive support for authoring new reports within Cognos ReportNet.
- **Info*Engine**—You must establish a support contract with vendors of legacy databases that are accessed using Info*Engine.
- **Oracle for Windchill Foundation and PDM, Windchill ProjectLink, Windchill PDMLink, and FlexPLM**—You must establish a support contract with Oracle to receive support including updates and patches necessary for using Oracle with Windchill. The Oracle database is one of the main components of a Windchill Solution and is critical for maintaining the integrity of data. PTC Technical Support is unable to provide assistance with Oracle issues unrelated to the Oracle database's interaction with Windchill, including backup and recovery of the database.

- **Oracle for Pro/INTRALINK**—For customers who purchased Oracle bundled with Pro/INTRALINK, PTC is the vendor for the Oracle Database Server. Contact PTC for support issues related to the Oracle database. If you purchased Oracle separately from Pro/INTRALINK, you must establish a support contract with Oracle to receive support including updates and patches necessary for using Oracle with Windchill. The Oracle database is one of the main components of a Windchill Solution and is critical for maintaining the integrity of data. PTC technical support is unable to provide assistance with Oracle issues unrelated to the Oracle database's interaction with Windchill, including backup and recovery of the database.
- **SQL Server**—You must establish a support contract with Microsoft to receive support, including updates and patches necessary for using SQL Server with Windchill. The SQL Server database is one of the main components of a Windchill Solution and is critical for maintaining the integrity of data. PTC technical support is unable to provide assistance with SQL Server issues unrelated to the SQL Server database's interaction with Windchill, including backup and recovery of the database.
- **ProductView**—You can configure ProductView to visualize the geometry and product structure of CAD models from many vendors. These models can be accessed from the file system directly or from other PDM systems available on the market. You should establish a support contract with the vendors of those CAD or PDM systems, such as CATIA and I-DEAS.
- **Windchill MCAD and ECAD Integrations**—You can configure Windchill to integrate with third-party CAD systems from many vendors. You should establish a support contracts with the vendors of those third-party CAD systems, such as CATIA and I-DEAS.

Support for PTC PLM On Demand

If you want the benefits of Product Lifecycle Management (PLM), [PTC PLM On Demand](#) is a subscription service for Windchill PDMLink and Windchill ProjectLink that offers electronic access to Technical Support. Each customer site has one Super User who can contact PTC Technical Support during business hours. All other users go through their designated Super User for support.

Using PLM On Demand as a Super User

To access PLM support, the Super User uses the H = type SCN. This SCN has the following format: #H#####, for example, 5H1234567.

The interface points the Super User to Call Logger and all other users to the designated Super User.

All communication with PTC Technical Support is done electronically for this service. In each case, Technical Support immediately issues a unique support request number in the format C#####, for example, C1234567. Use this number to track the status of your issue.

You can access the PTC On Demand Super User Support area in following ways:

- On your browser, select **Support > PTC PLM On Demand** and click **Super User Support**.
- On the PTC Web site, select **Customer Resources > PTC PLM On Demand** and click **Access Super User Portal**.

The Super User can also use Call Logger via the **Super User Support Portal** of the PTC Web site. File your request for a product of Windchill PDMLink (**Home, Products, Change, and Library** tabs) or Windchill ProjectLink (**Project** tab) with **PLM On Demand** as the module.

Call Logger provides easy-to-follow instructions and returns a service request number immediately upon submission of all information. You will receive an electronic response back in four business hours or fewer.

Following Up a Logged Call for PLM On Demand

To follow up a logged call, send the e-mail to cs_ptc@ptc.com and specify your call number, for example, C1234567, as the subject of the e-mail. To track the status of a call or contact a technical support engineer, add a comment using Call Tracker on the PTC Web site.

For further information on tracking your requests for support, their resolution, priorities, and the escalation of issues, read the previous applicable sections.

Windchill Maintenance and Patches

The application of code corrections is part of the normal maintenance of your Windchill system. PTC provides maintenance for Windchill products and applicable third-party applications via the following release vehicles:

- Maintenance releases
- Temporary patches

Regular maintenance releases provide code corrections for critical issues. They contain fixes for SPRs (Software Performance Reports) that have been reported to PTC. You can order these updates in CD-ROM, or you can download them from www.ptc.com/support/index.htm, the PTC Support Web site.

Temporary patches are emergency, single-issue code corrections for specific customers. Any code delivered in temporary patches is automatically added to the next available maintenance release. After the code has been incorporated into a maintenance release, the temporary patch should not be installed. Technical support for the temporary patch ceases when the maintenance release containing the permanent fix is released.

FlexPLM Patches

Code corrections for critical software issues are provided in FlexPLM maintenance releases in the same manner as for Windchill Solutions

- Temporary patches are delivered via a “rolling” temporary patch. This type of patch contains more than one SPR correction and is built against specific FlexPLM maintenance releases. As new temporary patches are requested, the SPRs are added to the rolling patch cumulatively. As with Windchill temporary patches, FlexPLM rolling temporary patches are for emergency code corrections.
- Sizing patches extend the size of an OOTB FlexTyped object. In cases where the number of object attributes needs to be increased, you can request a FlexPLM sizing patch from PTC Technical Support. The Technical Support Engineer will provide a requirements document to be filled out. A patch based on these requirements will then be created and distributed.

8

Arbortext Products Technical Support Guidelines

PTC Technical Support provides guidelines for customizing and implementing Arbortext products. This chapter describes the requirements your Arbortext customization must meet to be supported.

Topic	Page
Overview	8-2
Assistance Using Arbortext Products	8-3

Overview

Support services for your Arbortext products and customized applications are as important as their features and functions. PTC offers a broad spectrum of quality services for Arbortext customers, including the following:

- Custom Application Development and Support
- Training Services
- Support for Arbortext Integrations with Partner Products
- Technical Support

Custom Application Development and Support

Custom applications enhance products to satisfy specialized requirements. An in-house developer, PTC Consulting Services, or a third-party developer can create them for you. If you need consulting services to assist with development or support of a custom application, contact your PTC Sales Representative.

See Chapter 2, Customer Care Center, for more information about consulting and PTC Global Services.

Training Services

PTC Training Services offers a comprehensive curriculum and solid instruction in XML, SGML, and Arbortext products. You can opt for standard or customized courses at a PTC facility or at your site.

PTC instructors are experienced and skilled Arbortext product users with thorough knowledge of XML and SGML concepts. They facilitate structured, hands-on interactions and the exchange of techniques and technical information.

See the PTC web site at www.ptc.com/services/training for training classes, schedules, and other options. In addition, see Chapter 2, Customer Care Center, for more information about Training Services.

Support for Arbortext Integrations with Partner Products

Arbortext products integrate with a number of PTC partner products, such as content management systems. If you encounter a problem relating to both an Arbortext product and a partner product, Technical Support will work with you and our partner to resolve the problem. If the problem lies solely with the partner software, you will be asked to contact the partner directly for further support.

If PTC Global Services developed the interface, contact them directly for support. If PTC did not develop the interface, then contact the responsible individuals.

Technical Support

PTC Technical Support answers questions about Arbortext products and their related documentation. You are eligible for technical support and automatic product updates if you have a current maintenance agreement. Technical Support does not provide training or consulting services.

Assistance Using Arbortext Products

Technical Support for Arbortext products includes the following types of assistance:

- Product updates
- Help with installation
- How to use a product feature
- Analysis of error messages
- Identification and isolation of the source of a product problem
- Technical information, workarounds, and patches
- Submission of product problems

Exceptions and Limitations

Technical Support is only for PTC Arbortext products unless specified otherwise in your license agreement. An overview of exceptions and limitations follows:

- Support for your operating system or third-party software—Only Arbortext products are supported, unless the product is specifically included in your license agreement.
- Unsupported platforms—Subject to the terms of your license agreement, you may use Arbortext products on undocumented platforms and versions. However, PTC does not provide support under those circumstances.
- Citrix (EXTEND)—PTC does not explicitly test or certify the use of Arbortext products in the Citrix environment. Customers may use these environments for their Arbortext deployments. In these cases, PTC will provide technical support for Arbortext products in that environment but cannot provide support or consultation on the

configuration of that environment or on issues that are believed to be caused by the Citrix environment. PTC uses the following guidelines to determine whether an issue involving a Citrix environment is supported:

- For issues directly related to Arbortext products, PTC Technical Support will provide support. If PTC suspects that the Citrix environment is the likely reason for the issue, you will be asked to contact your Citrix support representative for assistance.
 - For issues directly related to Citrix such as configuration and setup of the Citrix environment, PTC cannot provide technical support. You will be asked to contact your Citrix support representative for assistance.
- Virtual environments—PTC does not explicitly test or certify the use of Arbortext inside virtual environments such as VMWare, Xen, Microsoft Virtual PC, or any of the embedded UNIX virtualization technologies. Customers may use such environments for their Arbortext deployments, but the guest operating system must be supported by Arbortext and the Arbortext software must be correctly licensed. In these cases, PTC will provide technical support for Arbortext in a virtualized environment but cannot provide support or consultation on the configuration of the virtual environment or on issues that are believed to be caused by the virtual environment. PTC uses the following guidelines to determine whether an issue involving a virtual environment is supported:
 - For issues directly related to Arbortext products, PTC Technical Support will provide support. If PTC suspects that the virtualization environment is the likely reason for the issue, you will be asked to contact the vendor of your virtualization product for assistance.
 - For issues directly related to the virtual machine such as configuration and set up of the virtual environment, image size, performance, device emulation, or network emulation, PTC cannot provide technical support. Contact the vendor of your virtualization product for assistance.
- Customized applications—Technical Support answers simple questions and provides limited assistance. They cannot answer questions such as “What’s the best way to design my application?” or “My custom application doesn’t work. Can you help me locate the source of the problem?” For help in these areas, contact your PTC Sales Representative to get assistance from our consulting group.

- **Training**—Technical Support answers how-to questions. However, PTC recommends product training from Training Services or Consulting Service for in-depth instruction.

Techniques and workarounds—Solutions created by Technical Support are supported unless you are told explicitly to the contrary. PTC cannot guarantee that a workaround will not cause or solve other problems. A workaround that resolves a problem other than the one for which it was specifically developed is not supported.

Guidelines and Limitations for Support for Arbortext Advanced Print Publisher

Arbortext Advanced Print Publisher (AAPP and formerly known as 3B2) offers a wide set of tools, features, and a proprietary template language. With these methods to enhance functionality, you can create a highly adapted environment for specific needs. The guidelines and limitation for support follow.

Guidelines for AAPP Support

To provide for efficient processing of your AAPP support question, follow these guidelines:

- **Isolate the issue you have in a simple document**—Use the sample `demo.3d` file as a guide to provide a file with only the designated problem. Provide a detailed description of what you expect to happen and of the actual results. Including a PDF file will help isolate the problem.

Your sample file must be reproducible in the out-of-the-box version of Arbortext Advanced Print Publisher. Technical Support cannot replicate customized environments.

- **Minimize customizations**—If you cannot reproduce the problem in the sample `demo.3d` file, strip as much customization out of your template as possible.
- **Strip down the sample document**—Eliminate as much as possible from the sample `demo.3d` file. For example, remove unnecessary styles, pages, and content. Provide the sample files as a single AAPP document file where possible. Save the linked libraries or other linked objects within your file to avoid any problems with location path resolution.

Limitations for AAPP Support

Limitations for Arbortext Advanced Print Publisher support are described below. For technical assistance with customized environments, templates, programming code, OCX/ActiveX

applications, and AAPP Enterprise applications, please contact PTC Global Services.

- **Customized environments and templates**—Customization of the AAPP environment and your templates is not directly supported. However, PTC can help with the usage of specific functions and features within AAPP that contribute to the creation of your customization or template.
- **Programming languages**—Support for Perl and XSLT/XPath coding is limited to advice. For example, code development or assistance in debugging or troubleshooting such code is not provided.

If you suspect an issue with the AAPP integration with these languages, file a Technical Support call. Provide a clear and concise description of the expected behavior and the actual behavior.

- **OCX/ActiveX applications**—AAPP is provided with an OCX/ActiveX build that can be integrated into other applications. The API for this application is described in the `api.txt` file in the `install` folder. Technical Support will answer questions related to the API but does not support custom applications written around it.
- **AAPP Enterprise**—AAPP Enterprise is a scalable resource management application that is used to manage the production of composition job queues. Technical support covers the Scheduler and Monitor applications and the Agents (AAPP composition resources). Also covered is the setup and configuration of this application. However, the use of custom socket listeners is not supported. As with the Desktop and Server applications, templates are supported as described in the first paragraph.

Data Needed to Reproduce the Issue

Before logging a call, gather the data to reproduce the issue. Specific suggestion for information to include follows. See Chapter 1, Sending Additional Data to Technical Support, for information on sending files.

- The module, or area, of your issue, such as Fonts.
- Exact text of any error message and the error number.
- Simple example of the conditions for triggering the error message. For large sample documents and complex applications, try to duplicate the problem with a smaller document, a distributed document type, or without your application files.

- The exact steps required to reproduce the problem. After documenting the steps, try them again. Make sure the steps are reproducible before sending them to Technical Support.
- Explanatory notes regarding the problem. For example, can you reproduce the problem or does it happen intermittently? Does the problem happen to all users or a select few? Does it happen on all workstations or only selected workstations? Does it happen with only one document or many?

9

Technical Support Web Site

The PTC Web site is a powerful tool for accessing information about PTC and its products, as well as for interacting with Technical Support and the Customer Care Center. This chapter provides information on using the PTC Web site.

Topic	Page
Inside the PTC Technical Support Web Site	9-2
24-Hour Access to Calls, SPRs, and TANs	9-4
Connecting to the PTC Technical Support Web Site	9-5
Creating a PTC Online Account.....	9-5

Inside the PTC Technical Support Web Site

PTC Technical Support maintains an extensive database of practical tips and techniques from years of customer contact. Through the Web site at www.ptc.com/support/index.htm, you can read numerous documents, updated weekly, that contain the latest technical information. You can use the PTC Web site 24 hours a day, 7 days a week, to take advantage of many benefits, such as the following:

- PTC software design techniques
- Effective use of PTC products through step-by-step design methods
- Product knowledge enhancement
- Productivity-boosting solutions to common design challenges
- In-depth answers to Frequently Asked Questions (FAQs)
- Call opening and tracking
- SPR tracking
- Technical Application Notes (TANs)

The Technical Support Web site contains a Knowledge Base, Web tools for customers, and user documentation. The next three tables list the resources and describe how the information can help you.

Knowledge Base

Type of Information	Purpose
Suggested Techniques	Provides step-by-step instructions, including color graphics, on how to use PTC software to complete common tasks.
Frequently Asked Questions (FAQs)	Provides answers to many of the most commonly asked questions from the PTC Technical Support database.
Technical Application Notes (TANs)	Provides information on the functionality of PTC software solutions and timely information on alternative techniques and solutions to common software issues.

Type of Information	Purpose
Technical Point of Interest (TPIs)	Provides technical tips that are not necessarily associated with a particular release of a PTC software product.
Hardware Configuration Notes	Provides the most up-to-date hardware configuration requirements for all PTC-supported platforms, including workstation models, operating systems, graphics configurations, and required operating system patches, as well as access to hardware vendor FAQs and Web sites.

Web Tools

Tool	Purpose
Call Logger	Provides easy-to-follow instructions for opening customer support calls on the Web. Returns a call number upon submission of the call information.
Call Tracker	Allows you to view your calls online and Provides online searching, tracking, and sorting capabilities for your calls and to add comments to your call. It automatically notifies the technical support engineer assigned to the call when comments are added.
SPR Tracker	Enables you to track the status of your Software Performance Reports (SPRs) online.
Update Advisor	Provides information to help to determine the value in updating to a release or datecode
Knowledge Base Monitor	Allows you to subscribe to multiple product and module combinations. When the application detects a match between a TAN or TPI and your predefined criteria, PTC will send you notification by e-mail with a link to the new or

Tool	Purpose
	modified technical document. You can redefine your subscription criteria at anytime.
Software Update Request	Allows you to request shipment or download of a software update for any PTC software product.

Reference Documentation

Document	Purpose
Installation Guide	Provides detailed instructions on how to install any specific PTC software package.
Release Notes or What's New	Provides information on a particular release of a particular product.
Read This First	Provides a summary of the important information about installation, platform requirements, operational issues, and other topics that you should read before installing and running the release.
Quick Reference Cards	Provides graphical quick-reference diagrams that summarize the user interface of the product.

24-Hour Access to Calls, SPRs, and TANs

You can track your calls and SPRs 24 hours a day on the PTC Web site using Call Tracker and SPR Tracker. With these applications, you can view the Calls and SPRs filed by your company to PTC Technical Support. These tools provide searching, tracking, and sorting capabilities. The Call Tracker also allows you to add comments, upload files, and escalate calls. When comments are added, the technical support engineer or license management representative assigned to your call is notified automatically.

You can search for Technical Application Notes (TANs) using the Update Advisor. TANs are documents, written by technical support engineers that describe software functionality, alternative techniques,

and common software issues. The TANs also tell you in which release of the software issues were discovered and in which releases they are resolved.

Connecting to the PTC Technical Support Web Site

Use the following procedure to connect to the PTC Technical Support Web site:

1. Using your Web browser, go to www.ptc.com.
2. Click **Technical Support** and log in to the **Technical Support** section. If you do not have an account to log on to, you can request one at the PTC Web site or by calling PTC Technical Support at the number for your local office listed at the back of this guide.

Mathcad: Information for Mathcad single-users is available at www.ptc.com/support/mathcad.htm.

Creating a PTC Online Account

To use the Technical Support areas of the PTC Web site, you must register for a PTC online account. With an online account, you can access the numerous tools at on the **Customer Support** page at www.ptc.com/support/index.htm. Use the tools for licensing, technical support, and software updates, and other uses as described throughout this guide. To create a PTC online account, use one of the following methods:

- **Existing users**—Use your PTC login.
- **New users**—Create a login using your Service Contract Number (SCN). This account will not be linked to your PTC web account. Go to www.ptc.com/appserver/common/account/basic.jsp.

Sign up for a PTC Customer Online Account. After you submit the form, you will receive a call number. Your online account will be considered unverified and you will have limited access to certain functions on the PTC Web site. You must verify your account by following the instructions that will be sent to you via e-mail.

10

Index

A

- Abortext Advanced Print Publisher (AAPP)
 - guidelines for support, 8-5
 - limitations for support, 8-6
- account for PTC Web site, 9-6
- Apache
 - support contract for, 7-15
- Aphelion
 - support contract for, 7-16
- Aphelion issues and Windchill, 7-13
- API
 - support for, 7-8
 - usage of, 7-8
 - decompiling source code, 7-8
 - supported languages, 7-9
- application development for Arbortext, 8-2
- Arbortext
 - support for virtual environments, 8-4
- Arbortext products
 - and the Citrix (EXTEND) environment, 8-4
 - and virtual environments, 8-4
 - assistance using, 8-3
 - custom application development and support, 8-2
 - determining release and version number, 5-4
 - gathering required information for PTC Technical Support, 8-7

- overview, 8-2
- support limitations and exceptions, 8-3
- technical support, 8-2
- training services, 8-2

Assessment Services, 2-8

C

- CADDS
 - determining release and version number, 5-4
 - gathering required information for PTC Technical Support, 6-3
- Call Logger
 - about, 5-17
 - using to upload a file to Technical Support, 6-21
- Call Logger tool
 - about, 5-8
- Call Tracker
 - accessing calls, SPRs, and TANs with, 9-6
 - checking an enhancement request, 5-18
 - on PTC Web site, 3-10
 - Technical Support calls, 5-9
 - using to upload a file to Technical Support, 6-21
- calling
 - License Management
 - escalating your issue, 3-11
 - following up your call, 3-10

- preparing for your call, 3-9
- resolving your call, 3-10
- PTC Technical Support
 - for an Enterprise Down priority, 5-13
 - opening a call, 5-8
 - preparing for your call, 5-7
 - tracking a call, 5-8
 - understanding call priority, 5-12
- Cognos ReportNet
 - support contract for, 7-16
- Cognos ReportNet issues and Windchill, 7-13
- command-line program, connecting to the PTC File Transfer Protocol (FTP) server from, 6-18
- configuration of third-party products in Windchill, 7-11
- configurations for Windchill, 7-4
- Consulting Services, 2-7
- Contracts, 2-6
- Convera RetrievalWare
 - support contract for, 7-16
- Corporate Learning Programs, 2-7
- Credit and Collections, 2-6
- custom reports
 - creation of, 7-8
 - technical support for, 7-8
- Customer Care Center
 - Contracts, 2-6
 - Credit and Collections, 2-6
 - departments, 1-2
 - Distribution, 2-6
 - Maintenance Support, 2-2
 - Order Management, 2-5
 - overview, 2-1
 - PTC Global Services, 2-6
- Customer Detailed License Report, 3-4
- Customer Service
 - Customer Care Center, 1-2
 - departments, 1-2
 - identifying group to contact, 1-2
 - License Management, 3-2
 - placing a software order, 3-3
- customization of Windchill
 - about, 7-2
 - customer source code examples, 7-8

- requirements for, 7-3
- support for, 7-3
- using programming styles, 7-7
- using the customization toolkit, 7-2

D

- data
 - sending by e-mail, 6-20
 - sending on disk or tape media, 6-16
 - sending using Call Logger, 6-21
 - sending using Call Tracker, 6-21
 - sending using the PTC File Transfer Protocol (FTP) server, 6-17
 - sending using the PTC secure FTP server, 6-19
- database products and Winchill issues, 7-13
- dataloader tools, support for, 7-6
- decompiling source code, 7-8
- determining release and version of a product
 - Arbortext products, 5-4
 - CADDS, 5-4
 - DIVISION ProductView, 5-4
 - Electronic Design Entry (EDE), 5-4
 - FlexPLM, 5-4
 - InterComm products, 5-5
 - Mathcad, 5-5
 - Optegra EPD.Connect, 5-5
 - Optegra Vault (UNIX), 5-5
 - Optegra Vault (Windows), 5-5
 - Pro/ENGINEER, 5-5
 - Pro/INTRALINK, 5-6
 - Routed Systems Designer, 5-6
 - Simulation, 5-6
 - Windchill DynamicDesignLink, 5-6
 - Windchill PartsLink, 5-7
 - Windchill PDMLink, 5-6
 - Windchill ProductView, 5-7
 - Windchill ProjectLink, 5-6
 - Windchill Visualization, 5-7
- DIMENSION III
 - gathering required data for PTC Technical Support, 6-3
- Distribution, 2-6
- DIVISION ProductView

- determining release and version number, 5-4
- gathering required data for PTC Technical Support, 6-3

documentation. *See* reference documentation

E

Electronic Design Entry (EDE)

- determining release and version number, 5-4
- gathering required data for PTC Technical Support, 6-3

emergency system problems

- information required, 5-14
- protocol in reporting, 5-14

encrypted files

- creating, 6-16

encrypting data for transfer

- commands for, 6-16
- using PGP, 6-15

enhancement requests

- checking progress, 5-18

enhancements for products, 5-16

- submitting an enhancement request, 5-16
- tracking enhancement requests, 5-16

error tracking in customized Windchill Solutions, 7-4

escalating

- license management issues, 3-11
- technical issues (SPRs), 5-11

Europe, License Management phone support, 3-8

F

Far East, License Management phone support, 3-8

FAST InStream

- support contract for, 7-16

Feedback Line, 4-4

FlexPLM

- determining release and version number, 5-4
- gathering required data for PTC Technical Support, 6-3

FTP client with graphic user interface

connecting to the PTC File Transfer Protocol (FTP) server from, 6-18

FTP secure server. *See* PTC secure FTP server

FTP server. *See* PTC File Transfer Protocol (FTP) server

G

gathering required data

- for Windchill Visualization, 6-11

Global Services

- PTC Global Services. *See*

I

IDE (Integrated Development Environment), 7-14

- issues with, 7-14
- Windchill support for, 7-14

Implementation Services, 2-7

Info*Engine products

- gathering required data for PTC Technical Support, 6-4
- support contract for legacy databases, 7-16

Information Modeler

- Windchill, 7-7

installation and configuration issues in Windchill

- PTC Technical Support, 6-11

Windchill

- PTC Technical Support, 6-11
- installation guides, 9-5
- installation of third-party products in Windchill, 7-11

Integrated Development Environment. *See* IDE

InterComm products

- determining release and version number, 5-4
- gathering required data for PTC Technical Support, 6-4, 6-5

ISO 9000

- certification, 4-3

issues

- escalation of

 - License Management, 3-11
 - escalation of SPRs, 5-11

- in third-party products in Windchill, 7-12
- troubleshooting, 5-2

ITAR

- 24-hour support process, 6-15
- data transfer, 6-14

J

- Java programming in Windchill, support for, 7-7

- Java technology

 - Windchill support for, 7-13

- Java technology issues and Windchill, 7-13

- JavaScript, 7-10

K

- Knowledge Base

 - about, 9-2

 - frequently asked questions (FAQs) in, 9-2

 - hardware configuration information in, 9-2

 - suggested techniques in, 9-2

 - technical application notes (TANs) in, 9-2

 - technique points of interest (TPIs), 9-2

- Knowledge Base monitor, 9-4

L

- languages supported by Windchill

 - Solutions, 7-9

- license codes

 - accessing, 3-4

 - obtaining, 3-3

 - requesting a Detailed License Report, 3-4

- License Management

 - accessing license information, 3-4

 - calling

 - escalating your issue, 3-11

 - following up your call, 3-10

 - preparing for your call, 3-9

 - resolving your call, 3-10

 - contacting, 3-2

 - Europe phone support, 3-8

 - Far East phone support, 3-8

 - international offices, 3-8

 - license simplification, 3-8

 - modifying license configuration, 3-6

 - North America phone support, 3-8

 - obtaining license codes, 3-3

 - phone support, 3-8

 - placing an order, 3-3

 - privilege levels, 3-7

 - PTC Web tools, 3-2, 3-6

 - reconfiguring software licenses, 3-6

 - requesting a Detailed License Report, 3-4

 - requesting a new license pack, 3-5

 - sales order number (SON), 3-5

 - services provided, 3-2

 - tracking a call, 3-10

 - transferring licenses, 2-6

 - updating current address and hardware information, 3-4

- licenses

 - requesting new license pack, 3-5

 - simplification of, 3-8

 - transferring, 2-6

 - verifying information, 3-4

- LM. *See* License Management

M

- maintenance contracts

 - Maintenance Support program, 2-3

 - purchasing, 2-2

 - upgrading, 2-5

- Maintenance Support

 - contacting your representative, 2-2

 - Web site, 2-5

- Mathcad products

 - determining release and version number, 5-5

 - gathering required data for PTC

 - Technical Support, 6-6

 - single-user pre-call checklist, 5-2

- Mechanica. *See* Simulation

- modification of classes

 - in Windchill, 7-9

- modifying license configurations, 3-6

N

- NDA data transfer, 6-13
- non-disclosure agreements, 6-13
- North America
 - License Management phone support, 3-8
 - PTC Technical Support, 5-9

O

- online PTC account, 9-6
- opening a call
 - PTC Technical Support
 - by e-mail, 5-9
 - by telephone or fax, 5-9
 - on PTC Web site, 5-8, 5-17
 - to License Management
 - preparing for, 3-9
- Optegra
 - determining the release and version number of EPD.Connect, 5-5
 - gathering required data for PTC Technical Support, 6-3
- Optegra Vault (UNIX), determining release and version number, 5-5
- Optegra Vault (Windows), determining release and version number, 5-5
- Oracle database
 - for Pro/INTRALINK, 7-17
 - instance blocks, 7-13
 - issues with, 7-13
 - support contract for, 7-17
 - Windchill support for, 7-13
- Order Management, 2-5

P

- PGP encryption tool
 - about, 6-15
 - assembling the data, 6-16
 - encrypting the data, 6-16
 - installing, 6-15
 - public key from PTC, 6-15
- phone support for License Management, 3-8
- PLM On Demand
 - about, 7-18
 - following up a logged call, 7-18
 - use by the Super User, 7-18

- privilege levels for License Management, 3-7
- Pro/ENGINEER
 - determining release and version number, 5-5
 - gathering required data for PTC Technical Support, 6-6
- Pro/FICENCY Tool, 2-7
- Pro/INTRALINK
 - determining release and version number, 5-6
 - gathering required data for PTC Technical Support, 6-7
 - using the Oracle database, 7-17
- products
 - enhancement for, 5-16
- ProductView
 - support contracts for CAD and PDM systems, 7-17, 7-18
- programming styles, support for, 7-7
- PTC File Transfer Protocol (FTP) server
 - about, 6-17
 - connecting to
 - from a command-line program, 6-18
 - from a Web browser, 6-18
 - from an FTP client with graphics user interface, 6-18
 - requirements for sending data, 6-17
- PTC Global Services
 - about, 2-6
 - Consulting Services, 2-7
 - Implementation Services, 2-6
 - training services, 2-6
- PTC secure FTP server
 - about, 6-19
 - connecting to, 6-19
 - setting up the secure client, 6-19
- PTC Service Contract Number, 5-7
- PTC Technical Support
 - benefits of, 4-2
 - Call Logger, 9-4
 - Call Tracker, 9-4
 - calling
 - opening a call, 5-8
 - preparing for your call, 5-7
 - tracking a call, 5-8
 - contacting

- pre-call checklist, 5-2
- departments, 1-3
- Feedback Line, 4-4
- gathering required data
 - for Arbortext Advanced Print Publisher, 6-2
 - for Arbortext Editor, Arbortext Styler, Arbortext Architect (Text Editor), and Arbortext PE Interactive, 6-2
 - for Arbortext Publishing Engine, Arbortext Contributor, Arbortext Dynamic Link Manager, 6-2
 - for CADDs, 6-3
 - for DIMENSION III, 6-3
 - for DIVISION ProductView, 6-3
 - for Electronic Design Entry (EDE), 6-3
 - for FlexPLM, 6-3
 - for Info*Engine products, 6-4
 - for InterComm products, 6-4, 6-5
 - for Mathcad, 6-6
 - for Optegra, 6-3
 - for Pro/ENGINEER, 6-6
 - for Pro/INTRALINK, 6-7
 - for Routed Systems Designer, 6-8
 - for Simulation, 6-8
 - for Windchill configuration issues, 6-11
 - for Windchill Import/Export, 6-9
 - for Windchill Information Modeler, 6-10
 - for Windchill installation issues, 6-11
- hardware configuration information, 9-2
- ISO 9000 certification of, 4-3
- Knowledge Base monitor, 9-4
- North America, 5-9
- opening a call
 - by e-mail, 5-9
 - by telephone or fax, 5-9
 - on the PTC Web site, 5-8, 5-17
- resolving your question, 5-10
- securing data for transfer, 6-13
- sending data to
 - by e-mail, 6-20
 - multiple files, 6-12
 - on disk or tape media, 6-16
 - using Call Logger, 6-21
 - using Call Tracker, 6-21
 - using the PTC File Transfer Protocol (FTP) server, 6-17
 - using the PTC secure FTP server, 6-19
- sending multiple files to
 - from a UNIX platform, 6-12
 - from a Windows platform, 6-13
- service contract number, 5-7
- software update request, 9-4
- South America, 5-9
- SPR Tracker, 9-4
- SPRs, 5-10
- support contract
 - for Apache, 7-15
 - for Aphelion, 7-16
 - for Cognos ReportNet, 7-16
 - for Convera RetrievalWare, 7-16
 - for FAST InStream, 7-16
 - for Rational Rose, 7-16
 - for Tomcat, 7-15
- support of Windchill Solutions releases, 7-5
- tracking a call on the PTC Web site, 5-9
- tracking enhancement requests on the PTC Web site, 5-18
- understanding call priority, 5-12
- understanding escalation levels, 5-15
- Update Advisor, 9-4
- Web site
 - about, 9-2
 - frequently asked questions (FAQs), 9-2
 - Knowledge Base, 9-2
 - PTC Web tools, 9-4
 - reference documentation, 9-5
 - SPRs on, 9-6
 - suggested techniques, 9-2
 - technical application notes (TANs), 9-2
 - technical points of interest (TPIs), 9-2
- Windchill, 7-7
 - customer source code examples, 7-8
 - for Java programming, 7-7
 - usage of API, 7-8
- Windchill Customization, 7-7
- PTC Technical Support Web site
 - connecting to, 9-6
 - creating an account for, 9-6
- PTC Web site

- PTC Technical Support
 - opening a call, 5-8, 5-17
 - tracking a call, 5-9
 - tracking an enhancement request, 5-18
 - URL, 5-2
 - tracking calls on, 3-10
- PTC Web tools
 - about, 9-4
 - Call Logger, 9-4
 - Call Tracker, 9-4
 - Knowledge Base monitor, 9-4
 - License Management, 3-2, 3-6
 - on PTC Technical Support Web site, 9-2
 - software update request, 9-4
 - SPR Tracker, 9-4
 - Update Advisor, 9-4

Q

- quick reference cards, 9-5

R

- Rational Rose
 - support contract for, 7-16
- Read This Firsts, 9-5
- reconfiguring software licenses, 3-6
- reference documentation
 - about, 9-5
 - installation guides, 9-5
 - quick reference cards, 9-5
 - Read This Firsts, 9-5
 - release notes, 9-5
 - types of, xi
- release notes, 9-5
- reporting software
 - issues with, 7-13
 - Windchill support for, 7-13
- resolving your technical support question, 5-10
- Routed Systems Designer
 - determining release and version number, 5-6, 6-8
 - gathering required data for PTC Technical Support, 6-9

S

- sales order number (SON), 3-3
- search and indexing servers
 - Windchill support for, 7-14
- securing data for transfer
 - 24-hour support process, 6-15
 - about, 6-13
 - ITAR data, 6-14
 - NDA data, 6-13
- sending data
 - to PTC Technical Support, 6-12
 - by e-mail, 6-20
 - from UNIX, 6-12
 - from Windows, 6-13
 - on disk or tape media, 6-16
 - using Call Logger, 6-21
 - using Call Tracker, 6-21
 - using the PTC File Transfer Protocol (FTP) server, 6-17
 - using the PTC secure FTP server, 6-19
 - using the PTC File Transfer Protocol (FTP) server
 - connecting to, 6-17
 - requirements for, 6-17
 - using the PTC secure FTP server
 - setting up the FTP, 6-19
 - using the PTC secure FTPserver
 - connecting to, 6-19
- Simulation
 - determining release and version number, 5-6
 - gathering required data for Technical Support, 6-8
 - software errors in third-party products in Windchill, 7-12
 - software orders
 - obtaining license codes for, 3-3
 - placing, 3-3
 - software performance reports. *See* SPRs
 - Software Performance Reports (SPR)
 - 24-hour access to, 9-6
 - tracking, 9-6
 - software update requests, 9-4
 - SON. *See* sales order number
 - source code, decompiling, 7-8
 - South America

- PTC Technical Support, 5-9
- SPR Tracker
 - about, 5-11
 - accessing calls, SPRs, and TANs with, 9-6
- SPRs
 - escalating, 5-11
 - submitting, 5-10
 - tracking, 5-10
- SQL Server
 - support contracts for use with Windchill, 7-17
- Structural and Thermal Simulation. *See* Simulation
- support
 - for Arbortext in virtual environments, 8-4
 - for customizations of Windchill Solutions, 7-3
 - for Windchill configurations, 7-4
 - for Windchill Customization, 7-7
 - for Windchill solutions in virtual environments, 7-5
 - of Windchill releases, 7-5

T

- technical support
 - for custom reports, 7-8
 - for virtual environments, 7-5, 8-4
 - offered by VARs, 4-2
- Technical Support. *See* PTC Technical Support Web site
 - Knowledge Base, 9-2
- third-party products
 - configuration of in Windchill, 7-11
 - in Windchill
 - Aphelion, 7-13
 - database products, 7-13
 - IDE (Integrated Development Environment), 7-14
 - issues in, 7-12
 - Java technology, 7-13
 - reporting software, 7-13
 - support contracts for, 7-15
 - support for, 7-12
 - Web browsers, 7-15
 - Web servers, 7-15

- in Windchill, 7-11
- JavaScript, 7-10
- search and indexing servers, 7-14
- software errors in Windchill, 7-12
- Tomcat
 - support contract for, 7-15
- tracking calls
 - on the PTC Web site, 3-10
 - to PTC Technical Support, 5-9
- tracking enhancement requests, 5-16
- Training Services, 2-6
- troubleshooting, 5-2

U

- UNIX, sending data from, 6-12
- Update Advisor
 - about, 9-4
 - searching for TANs with, 9-6
- upgrading a maintenance contract, 2-5
- user documentation, 9-2
 - conventions, xii
 - sending comments to PTC, xi

V

- value-added resellers
 - partnerships with PTC, 4-2
 - technical support for, 4-2
- VARs. *See* value-added resellers
- virtual environments
 - support for Arbortext products, 8-4
 - support for Windchill solutions, 7-5
- Visualization. *See* Windchill Visualization

W

- Web browsers
 - connecting to the PTC File Transfer Protocol (FTP) server from, 6-18
 - issues with, 7-15
 - Windchill support for, 7-15
- Web servers
 - issues with, 7-15
 - Windchill support for, 7-15
- Web site

- PTC Technical Support, 9-2
- Windchill
 - Aphelion support, 7-13
 - classes
 - class extensions, 7-10
 - extensions of, 7-10
 - modification of, 7-9
 - use of, 7-10
 - Cognos ReportNet support, 7-13
 - customization
 - requirements for, 7-3
 - support of end users, 7-3
 - using programming styles, 7-7
 - using the customization toolkit, 7-2
 - Customization functionalities, 7-7
 - Info*Engine products, support contract for legacy databases, 7-16
 - Information Modeler, 7-7
 - License Agreement, 7-2
 - ProductView, support contracts with vendors of CAD or PDM systems, 7-17, 7-18
 - PTC Technical Support
 - customer source code examples, 7-8
 - usage of API, 7-8
 - SQL Server, support contracts with vendors, 7-17
 - support for Java programming, 7-7
 - support for Windchill solutions in virtual environments, 7-5
 - supported configurations, 7-4
 - supported releases, 7-5
 - third-party product support contract
 - for Apache, 7-15
 - for Aphelion, 7-16
 - for Cognos ReportNet, 7-16
 - for Convera RetrievalWare, 7-16
 - for FAST InStream, 7-16
 - for Oracle database, 7-16
 - for Oracle for Pro/INTRALINK, 7-17
 - for Rational Rose, 7-16
 - for SQL Server, 7-17
 - for Tomcat, 7-15
 - third-party products
 - Aphelion, 7-13
 - configuration of, 7-11
 - database products, 7-13

- IDE (Integrated Development Environment), 7-14
 - installation, 7-11
 - issues in, 7-12
 - Java technology, 7-13
 - JavaScript, 7-10
 - reporting software, 7-13
 - search and indexing servers, 7-14
 - software errors in, 7-12
 - support contracts for, 7-15
 - support for, 7-12
 - use of, 7-10
 - Web browsers, 7-15
 - Web servers, 7-15
- use of the API
 - decompiling source code, 7-8
 - JavaScript, 7-10
 - supported languages, 7-9
- Web browsers
 - Internet Explorer, 7-15
 - Netscape Communicator, 7-15
- Web servers
 - Apache, 7-15
 - Internet Information Server, 7-15
 - Netscape Enterprise Server, 7-15
- Windchill DynamicDesignLink, determining release and version number, 5-6
- Windchill Import/Export
 - gathering required data for PTC Technical Support, 6-9
- Windchill Information Modeler
 - gathering required data for PTC Technical Support, 6-10
- Windchill PartsLink, determining release and version number, 5-6
- Windchill PDMLink, determining release and version number, 5-6
- Windchill ProductView
 - determining the release number and version, 5-7
- Windchill ProjectLink, determining release and version number, 5-6
- Windchill Solutions
 - customizing, 7-2
 - dataloader tools, 7-6
 - error tracking, 7-4

- maintenance and patches, 7-19
- overview, 7-2
- support of releases, 7-5
- supported languages, 7-9
- third-party vendors, 7-15

Windchill Visualization

- determining the release number and version, 5-7
- gathering required data for PTC Technical Support, 6-11
- Windows, sending data from, 6-13

Worldwide Contact Information

Value-Added Reseller Technical Support

Customers of value-added resellers (VARs) should contact their VAR directly. To identify the VARs in your area, see www.ptc.com/partners/drp/index.htm.

PTC Electronic Support

Electronic services are available 7 days a week, 24 hours a day.

URL: www.ptc.com/support/index.htm

E-Mail: cs_ptc@ptc.com (For opening calls and sending data.)
latinamericasupport@ptc.com (For Portuguese-speaking and Spanish-speaking customers only.)

cs-webaccts@ptc.com (For Web account issues only. Customer Number and Service Contract Number (SCN) required.)

<ftp.ptc.com>

FTP:

PTC Worldwide Technical Support

You can contact PTC for Technical Support, License Management, Maintenance Sales, and Training services by telephone Monday through Friday in local time zones and local languages.

North and South America

United States and Canada

- Technical Support
 - Phone - Toll Free [Telephone Menu Map](#)
800-477-6435
 - Fax
781-707-0328
- License Management
 - Phone - Toll Free
877-ASK-4-PTC
(877-275-4782)
 - Fax
781-707-0331
- Maintenance Sales
 - Phone - Toll Free
877-ASK-4-PTC
 - Fax
781-707-0322
- Order Management
 - Phone - Toll Free
877-ASK-4-PTC
 - Fax
781-707-0326
- Training
 - Phone - Toll Free
877-ASK-4-PTC
 - Fax
781-370-5307

Brazil

- Technical Support
 - Phone - Toll Free [Telephone Menu Map](#)
0800-891-0978
 - Fax
781-707-0328

Europe and Africa

Customer Care Centers cover the following services: Technical Support, License Management, Training, Consulting and Credit.

Austria

- Customer Care Center
 - Phone - Toll Free [Telephone Menu Map](#)
+800-PTC-4-HELP
(00-800-78-24-43-57)
- Maintenance Sales
 - Phone +49 89-32106-0

Belgium

- Customer Care Center
 - Phone - Toll Free [Telephone Menu Map](#)
+800-PTC-4-HELP
(00-800-78-24-43-57)
- Maintenance Sales
 - Phone +49 89-32106-0

Denmark

- Customer Care Center
 - Phone - Toll Free [Telephone Menu Map](#)
+800-PTC-4-HELP
(00-800-78-24-43-57)
- Maintenance Sales
 - Phone +44 1252-817600

Finland

- Customer Care Center
 - Phone - Toll Free [Telephone Menu Map](#)
+800-PTC-4-HELP
(00-800-78-24-43-57)
- Maintenance Sales
 - Phone +44 1252-817600

France

- Customer Care Center
 - Phone - Toll Free [Telephone Menu Map](#)
+800-PTC-4-HELP
(00-800-78-24-43-57)
 - Phone 04-42-970-007
- Maintenance Sales
 - Phone +44 1252-817600

Germany

- Customer Care Center
 - Phone - Toll Free
 - Phone
- Maintenance Sales
 - Phone

[Telephone Menu Map](#)

+800-PTC-4-HELP
(00-800-78-24-43-57)
06-950-070-845

+49 89-32106-0

Ireland

- Customer Care Center
 - Phone - Toll Free
- Maintenance Sales
 - Phone

[Telephone Menu Map](#)

+800-PTC-4-HELP
(00-800-78-24-43-57)

+44 1252-817600

Italy

- Customer Care Center
 - Phone - Toll Free
 - Phone
- Maintenance Sales
 - Phone

[Telephone Menu Map](#)

+800-PTC-4-HELP
(00-800-78-24-43-57)
02-69-682-737

+39 3965-656-68

Israel

- Customer Care Center
 - Phone - Toll Free
- Maintenance Sales
 - Phone

[Telephone Menu Map](#)

+800-PTC-4-HELP
(00-800-78-24-43-57)

+34 91-452-0128

Netherlands

- Customer Care Center
 - Phone - Toll Free
- Maintenance Sales
 - Phone

[Telephone Menu Map](#)

+800-PTC-4-HELP
(00-800-78-24-43-57)

+49 89-32106-0

Norway

- Customer Care Center
 - Phone - Toll Free
- Maintenance Sales
 - Phone

[Telephone Menu Map](#)

+800-PTC-4-HELP
(00-800-78-24-43-57)

+44 1252-817600

Portugal

- Customer Care Center
 - Phone - Toll Free [Telephone Menu Map](#)
+800-PTC-4-HELP
(00-800-78-24-43-57)
- Maintenance Sales
 - Phone +34 91-452-0128

Spain

- Customer Care Center
 - Phone - Toll Free [Telephone Menu Map](#)
+800-PTC-4-HELP
(00-800-78-24-43-57)
 - Phone 912-702-537
- Maintenance Sales
 - Phone +34 91-452-0128

South Africa

- Customer Care Center
 - Phone - Toll Free [Telephone Menu Map](#)
+800-PTC-4-HELP
(00-800-78-24-43-57)
- Maintenance Sales
 - Phone +44 1252-817600

Sweden

- Customer Care Center
 - Phone - Toll Free [Telephone Menu Map](#)
+800-PTC-4-HELP
(00-800-78-24-43-57)
 - Phone 08-58-536-847
- Maintenance Sales
 - Phone +44 1252-817600

Switzerland

- Customer Care Center
 - Phone [Telephone Menu Map](#)
1800-94-55
- Maintenance Sales
 - Phone +49 89-32106-0

United Kingdom (English, French, or Swedish support)

- Customer Care Center
 - Phone - Toll Free [Telephone Menu Map](#)
+800-PTC-4-HELP
(00-800-78-24-43-57)
 - Phone 02-073-650-696
- Maintenance Sales
 - Phone +44 1252-817600

Other European Countries (English support)

- Customer Care Center
 - Phone [Telephone Menu Map](#)
+33 442-97-02-01

Asia and Pacific Rim

Australia

- Technical Support [Telephone Menu Map](#)
 - Phone 1-800-553-565
 - Fax +91 20-6605-3009
- License Management and Maintenance Sales
 - Phone +86 21 61060421
 - Fax +86 21 61060400

China

- Technical Support [Telephone Menu Map](#)
 - Phone 800-810-0699
 - Fax +86 21- 61060744
- License Management and Maintenance Sales
 - Phone +86 21 61060421
 - Fax +86 21 61060400
- Training
 - Beijing
 - Phone +86 10-65908699
 - Fax +86 10-65908698
 - Guangzhou
 - Phone +86 20-87554426
 - Fax +86 20-87554416
 - Shanghai
 - Phone +86 21-58401877
 - Fax +86 21-58402030

Hong Kong

- Technical Support [Telephone Menu Map](#)
 - Phone 800-905330
 - Fax +86 21- 61060744
- License Management and Maintenance Sales
 - Phone +86 21 61060421
 - Fax +86 21 61060400
- Training
 - Phone +852 2802-8982
 - Fax +852 2587-9095

India

- Technical Support [Telephone Menu Map](#)
 - Phone 1 800 233-4599
 - Fax +91 20 6605 3009

- License Management and Maintenance Sales
 - Phone +86 21 61060421
 - Fax +86 21 61060400
- Training
 - Bangalore
 - Phone +91 80-2212-9741
 - Fax +91 80-2212-9747
 - Mumbai
 - Phone +91 22-2839-1596
 - Fax +91 22-2838-7512
 - New Delhi
 - Phone +91 11-4161-2233
 - Fax +91 11-4161-2232

Indonesia

- Technical Support [Telephone Menu Map](#)
 - Phone 001-803-65-7250
 - Fax +91 20 6605 3009
- License Management and Maintenance Sales
 - Phone +86 21 61060421
 - Fax +86 21 61060400

Japan

- Technical Support [Telephone Menu Map](#)
 - Phone 0120-20-9023
 - Fax+81 03-3346-8284
- License Management and Maintenance Sales
 - Phone +81 03-3346-8280
 - Fax +81 03-3346-8262
- Training
 - Phone +81 3-3346-8642
 - Fax +81 3-3346-8643

Malaysia

- Technical Support [Telephone Menu Map](#)
 - Phone - Toll Free 1-800-80-1026
 - Fax +91 20-6605-3009
- License Management and Maintenance Sales
 - Phone +86 21 61060421
 - Fax +86 21 61060400
- Training
 - Phone +60 3-7954-8198
 - Fax +60 3-7954-8197

New Zealand

- Technical Support [Telephone Menu Map](#)
 - Phone 0800-44-4376

- Fax +91 20-6605-3009
- License Management and Maintenance Sales
 - Phone +86 21 61060421
 - Fax +86 21 61060400

Philippines

- Technical Support [Telephone Menu Map](#)
 - Phone 1800-1651-0637
 - Fax +91 20-6605-3009
- License Management and Maintenance Sales
 - Phone +86 21 61060421
 - Fax +86 21 61060400

Singapore

- Technical Support [Telephone Menu Map](#)
 - Phone 1800-830-9901
 - Fax +91 20-6605-3009
- License Management and Maintenance Sales
 - Phone +86 21 61060421
 - Fax +86 21 61060400

South Korea

- Technical Support [Telephone Menu Map](#)
 - Phone 080-3469-001
 - Fax +86 21- 61060744
- License Management and Maintenance Sales
 - Phone +86 21 61060421
 - Fax +86 21 61060400
- Training
 - Phone +82 2-3484-8181
 - Fax +82 2-3484-819

Taiwan

- Technical Support [Telephone Menu Map](#)
 - Phone 0800-013069
 - Fax +86 21- 61060744
- License Management and Maintenance Sales
 - Phone +86 21 61060421
 - Fax +86 21 61060400
- Training
 - Kaohsiung
 - Phone +886 7-566-5266
 - Fax +886 7-566-5907
 - Taichung
 - Phone +886 4-2310-3311
 - Fax +886 4-2310-3334
 - Taipei
 - Phone +886 2-2758-8600
 - Fax +886 2-8788-3575

Thailand

- Technical Support [Telephone Menu Map](#)
 - Phone 001-800-65-6213
 - Fax +91 20-6605-3009
- License Management and Maintenance Sales
 - Phone +86 21 61060421
 - Fax +86 21 61060400

Technical Support Customer Feedback Line

The Technical Support Feedback Line is for general Technical Support concerns. For assistance with technical issues, use the electronic services or the Technical Support phone numbers above. To provide feedback, go to www.ptc.com/support/feedback/ts.htm. To discuss any general, nontechnical issues with a technical Support manager, call the number for your region listed below.

Worldwide Technical Support Customer Feedback Phone Numbers

- North American 1-888-782-3772
- Europe 00 800 PTC 4 HELP option 7
- Japan – Domestic Toll Free +0120 35-6211