



# Introduction to PTC Windchill Corrective and Preventive Action (CAPA) 11.0

## Overview

Course Code TRN-4762-T

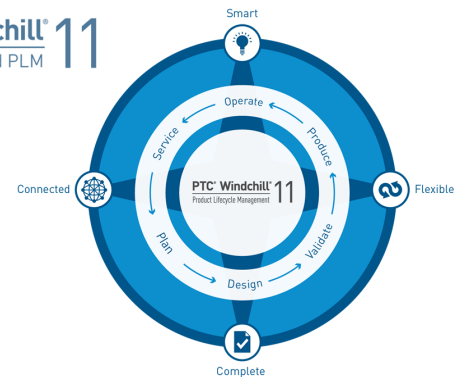
Course Length 16 Hours

**PTC® Windchill® 11**  
Smart Connected PLM

In this course, you will learn how to complete the day-to-day functions that enable you to create and manage product information with Windchill CAPA solution for corrective and preventive action. You will learn how to access and navigate the Windchill CAPA environment, and locate and view information. You will identify the overall CAPA process, learn how to create CAPA requests, perform root cause investigations, and create CAPA plans. Finally, you implement, confirm, and verify CAPA. Other topics include how to use Windchill PDMLink's communication and collaboration tools, and access user support functions and information.

At the end of each module, you will complete a set of review questions to reinforce critical topics from that module. At the end of the course, you will complete a course assessment in PTC University Proficiency intended to evaluate your understanding of the course as a whole.

This course has been developed using Windchill 11.0 F000.



## Course Objectives

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- Understand the basics of Windchill and Windchill CAPA
- Locate and view data in Windchill CAPA
- Understand the CAPA process in Windchill CAPA
- Create a new CAPA Request
- Review a CAPA Request
- Perform CAPA root cause investigation
- Create CAPA plans
- Create CAPA Plan Approval Packages
- Complete CAPA Plan Approval
- Implement action plans for CAPA
- Confirm and verify the CAPA
- Understand important CAPA Work Management topics



## Prerequisites

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- Basic browser and Web navigation skills
- Basic understanding of product management processes and deliverables

## Audience

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- This course is intended for any Windchill CAPA user requiring guidance for using Windchill CAPA. People in related roles will also benefit from taking this course.
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## Agenda

### Day 1

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| Module | 1 | Introduction to Windchill CAPA |
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| Module | 2 | Locating Information |
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| Module | 3 | Viewing Information |
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| Module | 4 | CAPA Process Overview |
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| Module | 5 | Request and Review CAPA |
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### Day 2

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| Module | 6 | Investigate Root Cause of CAPA |
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| Module | 7 | Plan CAPA |
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| Module | 8 | Implement CAPA |
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| Module | 9 | Confirm and Verify CAPA |
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| Module | 10 | Windchill CAPA Work Management |
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## Course Content

### Module 1. Introduction to Windchill CAPA

- i. PTC Global Quality Solution
- ii. Windchill CAPA
- iii. Windchill CAPA Out-of-the-Box Workflow
- iv. Windchill CAPA Environment
- v. Data Management Objects
- vi. Storage Locations
- vii. Logging On to Windchill
- viii. Understanding the Windchill User Interface
- ix. Using the Home Page
- x. Using Quick Links
- xi. Using the Navigator
- xii. Using the Breadcrumb Trail
- xiii. Quality Contexts
- xiv. The CAPA Table
- xv. CAPA Requests
- xvi. Process Controls
- xvii. Accessing Help

#### *Knowledge Check Questions*

### Module 2. Locating Information

- i. Locating Information
- ii. Using Simple Search
- iii. Using Advanced Search
- iv. Saving Searches
- v. Managing Searches
- vi. Browsing for Foldered Objects
- vii. Browsing for CAPA Objects

#### *Knowledge Check Questions*

### Module 3. Viewing Information

- i. Using Windchill Tables
  - ii. Working with Table Columns
  - iii. Managing Windchill Table Views
  - iv. New View Set Name
  - v. New View Choose Object Types
  - vi. New View Set Filters
  - vii. New View Set Column Display
  - viii. New View Set Sorting
  - ix. Understanding Information Pages
  - x. Customizing Information Pages
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- xi. CAPA Request Capabilities
- xii. Examining Windchill Parts
- xiii. Document Capabilities

*Knowledge Check Questions*

#### **Module 4. CAPA Process Overview**

- i. CAPA Process Overview
- ii. CAPA Process Overview (Steps 1–3)
- iii. CAPA Process Overview (Steps 4–5)
- iv. CAPA Requests
- v. Roles in the CAPA Process

*Knowledge Check Questions*

#### **Module 5. Request and Review CAPA**

- i. Request and Review CAPA Process Overview
- ii. Creating CAPA Requests
- iii. New CAPA Request - Set Attributes
- iv. New CAPA Request - Set Attachments
- v. New CAPA Request - Select Associations
- vi. Review CAPA Request - Enter Review Details

*Knowledge Check Questions*

#### **Module 6. Investigate Root Cause of CAPA**

- i. Investigate Root Cause of CAPA Process Overview
- ii. Performing CAPA Root Cause Investigation
- iii. New CAPA Investigation - Set Attributes
- iv. New CAPA Investigation - Risk Assessment
- v. New CAPA Investigation - Conclusion
- vi. New CAPA Investigation - Set Attachments

*Knowledge Check Questions*

#### **Module 7. Plan CAPA**

- i. Plan CAPA Process Overview
- ii. Planning the CAPA (CAPA Action Plan)
- iii. CAPA Planning - Set Attributes
- iv. CAPA Planning - Set Attachments
- v. Creating the Plan Approval Package
- vi. View the CAPA Request
- vii. Identify the Approvers
- viii. CAPA Plan Approval

*Knowledge Check Questions*

#### **Module 8. Implement CAPA**

- i. Implement CAPA Process Overview
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- ii. Implementing CAPA Using Engineering Change
- iii. Implement CAPA Using Action Implementation Process Overview
- iv. Action Implementation
- v. Action Implementation Details

*Knowledge Check Questions*

**Module 9. Confirm and Verify CAPA**

- i. Confirm and Verify CAPA Process Overview
- ii. Verify Effectiveness
- iii. Action Effectiveness Details
- iv. Creating CAPA Effectiveness Approval Package
- v. View the CAPA Request After Implementation
- vi. Identify the Effectiveness Approvers
- vii. CAPA Effectiveness Approval
- viii. Confirm and Verify CAPA without Engineering Change Process Overview
- ix. Confirm Execution
- x. Action Confirmation Details

*Knowledge Check Questions*

**Module 10. Windchill CAPA Work Management**

- i. Managing Your Windchill Notebook
  - ii. Using Your Windchill Clipboard
  - iii. Introduction to Communication Mechanisms
  - iv. Managing Subscriptions
  - v. Creating Subscriptions
  - vi. E-mailing Team Members
  - vii. E-mailing a Page URL
  - viii. Holding Discussions
  - ix. Holding Meetings
  - x. Scheduling Meetings
  - xi. Managing Your Calendar
  - xii. Preference Management
  - xiii. Setting Attachment Preferences
  - xiv. Setting Search Preferences
  - xv. Setting Table Preferences
  - xvi. Deleting Objects
  - xvii. The Save As Feature
  - xviii. The Rename Feature
  - xix. The Revise Feature
  - xx. The Set State Feature
  - xxi. Managing Folders
  - xxii. Event Management
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xxiii. Software Downloads  
*Knowledge Check Questions*



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