

Pro/INTRALINK 10.2

Curriculum Guide



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Live Classroom Curriculum Guide

- Introduction to Pro/INTRALINK 10.2
- Business Administration of Pro/INTRALINK 10.2
- System Administration of Windchill 10.2



Introduction to Pro/INTRALINK 10.2

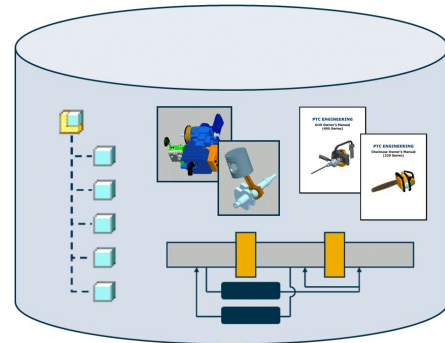
Overview

Course Code TRN-4271-T

Course Length 2 Days

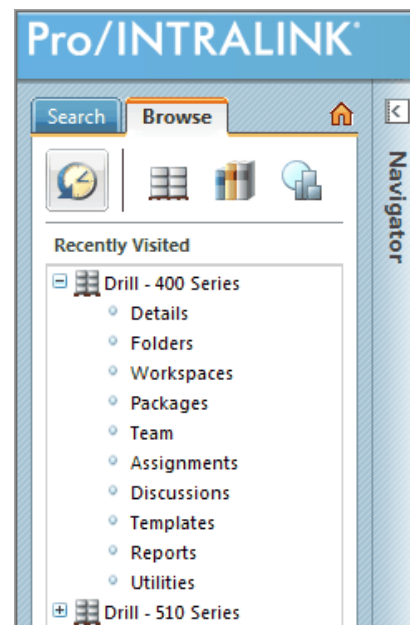
In this course, you will learn how to complete basic functions to navigate and view information within Pro/INTRALINK. You will discover how to access and navigate the Pro/INTRALINK environment, view product information, use Pro/INTRALINK's visualization tools, manage assigned tasks, and perform basic work management functions. Additionally, you will be taught the key capabilities and features of Pro/INTRALINK CAD Data Management and how to use Pro/INTRALINK to manage Creo design information. Specifically, you will focus on the day-to-day data management tasks required by the Creo user community. You will also learn how to use Pro/INTRALINK to perform basic PDM functions on Creo CAD Documents.

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 Pro/FICIENCY intended to evaluate your understanding of the course as a whole.



Course Objectives

- Understand the Pro/INTRALINK environment and terminology
- Locate design information
- View design information
- Understand visualization concepts and terminology
- Use Creo View Lite to view product information
- Use Pro/INTRALINK tools to manage your work
- Participate in Pro/INTRALINK processes
- Understand Pro/INTRALINK architecture
- Understand workspaces and how workspaces are used



- Create new designs and share design information
- Modify and manage existing design information
- Understand file relationships and dependencies
- Manage family tables
- Use workspace frames

Prerequisites

- Basic browser and Web navigation skills
- Working knowledge of Creo

Audience

- This course is intended for users who need to access the Pro/INTRALINK system to view information; check in, check out, or view Creo CAD data; perform system tasks; or use product information when making business decisions
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Agenda

Day 1

Module	1	Introduction to the Windchill Environment
Module	2	Locating Information
Module	3	Viewing Information
Module	4	Introduction to Visualization
Module	5	Creating and Managing Documents
Module	6	Getting Started with Creo Parametric Data Management

Day 2

Module	7	Initiating New Designs and Sharing Design Data
Module	8	Modifying and Managing Design Data
Module	9	Understanding File Relationships and Dependencies
Module	10	Managing Family Tables
Module	11	Managing CAD Data
Module	12	Managing Your Work
Module	13	Participating in Processes

Course Content

Module 1. Introduction to the Windchill Environment

- i. Pro/INTRALINK
- ii. Windchill Environment
- iii. Data Management Objects
- iv. Storage Locations
- v. Iteration and Revision Controls
- vi. Process Controls
- vii. Access Controls
- viii. Collaboration Features
- ix. Logging On to Windchill
- x. Understanding the Windchill User Interface
- xi. Using the Home Page
- xii. Using Quick Links
- xiii. Using the Navigator
- xiv. Using the Breadcrumb Trail
- xv. Navigating Products and Libraries
- xvi. 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
- vii. Using Mini Information Pages

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
 - xi. Viewing Structure
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- xii. Understanding Object Capabilities
- xiii. Document Capabilities
- xiv. CAD Document Capabilities

Knowledge Check Questions

Module 4. Introduction to Visualization

- i. Identifying Visualization Concepts
- ii. Identifying Visualized Intellectual Property Types
- iii. Generating Creo View Viewables
- iv. Identifying Readable Visualization Object Types
- v. Understanding Creo View's Basic Capabilities
- vi. Understanding the Creo View User Interface
- vii. Viewing Area User Interface
- viii. Understanding the Ribbon
- ix. The Creo View File Menu User Interface
- x. Quick Access Toolbar User Interface
- xi. Primary Panel User Interface
- xii. Understanding the Upper Data Panel
- xiii. Understanding the Lower Data Panel
- xiv. Starting Creo View from Windchill
- xv. Loading Viewables
- xvi. Opening Non-Model Files with Creo View
- xvii. Viewing Drawings
- xviii. Viewing Images
- xix. Marking Up Creo View Viewables
- xx. Adding Annotation Objects
- xxi. Notes and Reference Note Annotations
- xxii. Leader Line Annotations
- xxiii. Shape Annotations
- xxiv. Freehand Annotations
- xxv. GTOL Annotations
- xxvi. Stamp Annotations
- xxvii. Measuring Lengths
- xxviii. Measuring Distances
- xxix. Measuring Angles
- xxx. Measuring Diameter or Radius
- xxxi. Measuring Area
- xxxii. Taking a Measurement Summary

Knowledge Check Questions

Module 5. Creating and Managing Documents

- i. Document Capabilities
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- ii. Creating Documents and Links
- iii. New Document: Set Attributes – Type
- iv. New Document: Set Attributes – Template
- v. New Document: Set Attributes (Primary Content)
- vi. New Document: Set Attributes (Attributes)
- vii. New Document: Set Attachments
- viii. New Multiple Documents
- ix. Overview of Modifying Documents
- x. Modifying Documents — Check Out
- xi. Modifying Documents — Edit
- xii. Modifying Documents — Check In
- xiii. Modifying Documents — Undo Checkout
- xiv. Modifying Documents — Replace Content
- xv. Modifying Documents — Revise
- xvi. Understanding Document Relationships
- xvii. Establishing Document References Relationships

Knowledge Check Questions

Module 6. Getting Started with Creo Parametric Data Management

- i. Creo Parametric and Windchill Connectivity
 - ii. Windchill Integration
 - iii. Windchill Integration – Creo Parametric Menus
 - iv. Windchill Integration – Model Tree
 - v. Windchill Integration – Folder Browser
 - vi. Windchill Integration – Search
 - vii. Windchill Integration – Embedded or Separate Browser
 - viii. Windchill Integration – Event Management
 - ix. Registering a Windchill Server
 - x. Introduction to the Workspace
 - xi. Workspace Layout
 - xii. Creating Workspaces
 - xiii. Changing the Active Workspace
 - xiv. Working with Workspaces
 - xv. Deleting Workspaces
 - xvi. Changing Workspace Table Views
 - xvii. Customizing Workspace Table Views
 - xviii. Workspace Preferences – General
 - xix. Workspace Preferences – Document Configuration Specification
 - xx. Locating Design Information with Creo Parametric
 - xxi. Searching for Design Information
 - xxii. Browsing for Design Information
 - xxiii. Viewing CAD Document Information
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- xxiv. Viewing CAD Document Content
- xxv. Exposing PDM Information using Creo Parametric File Open
- xxvi. Exposing PDM Information in the Model Tree
- xxvii. Duplicate Names

Knowledge Check Questions

Module 7. Initiating New Designs and Sharing Design Data

- i. Sharing Creo Parametric Designs
- ii. Introducing New Designs to the Workspace
- iii. Using CAD Templates in New Designs
- iv. Initiating New Designs Using New CAD Document
- v. Workspace Save As
- vi. Introducing New Designs to the Commonsense
- vii. Understanding Check In
- viii. Commonsense Save As
- ix. Generating Viewables
- x. Creating Representations
- xi. Monitoring Publish Jobs
- xii. Adding CAD Documents to the Workspace
- xiii. Removing CAD Documents from the Workspace
- xiv. Understanding Workspace Architecture
- xv. Understanding Save, Upload, and Check In
- xvi. Understanding Web Browser Access to the Workspace
- xvii. Naming – Creo Parametric New Object
- xviii. Naming and Numbering Design Documents
- xix. Naming and Numbering Policy Example
- xx. Parameter to Attribute Mapping

Knowledge Check Questions

Module 8. Modifying and Managing Design Data

- i. Understanding Workspace Objects
 - ii. Modifying Creo Parametric Designs
 - iii. Modification Process – Check Out a CAD Document
 - iv. Modification Process – Modify a CAD Document
 - v. Modification Process – Check In a CAD Document
 - vi. Methods of Checking Out CAD Documents
 - vii. Check Out of the Non-Latest Iteration
 - viii. Understanding Check Out Status and Options
 - ix. Understanding Download and Check Out
 - x. Understanding Advanced Check In Options
 - xi. Canceling Modifications
 - xii. Workspace Status
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- xiii. Locking CAD Documents in the Workspace
- xiv. Using Library Parts in Assemblies
- xv. Renaming CAD Documents
- xvi. Moving Design Documents
- xvii. Revising Design Documents
- xviii. Revising from the Non-Latest Version
- xix. Revise and Check Out Action
- xx. Modifying CAD Document Attributes
- xxi. Creo Parametric Asynchronous Mode

Knowledge Check Questions

Module 9. Understanding File Relationships and Dependencies

- i. Managing Dependencies and Links
- ii. Sample Creo Parametric Dependencies
- iii. CAD Document Fundamentals for Models
- iv. CAD Document Fundamentals for Drawings
- v. Viewing Dependency Information in Windchill
- vi. Processing Dependencies
- vii. Managing Secondary Content Files with Windchill
- viii. Downloading Non-Latest Configurations
- ix. Using Creo Parametric to Compare PDM Model Versions
- x. Intelligent Hyperlinks within a Drawing Revision Block
- xi. Typical Data Management Problems
- xii. Regeneration Failures
- xiii. Incomplete Objects
- xiv. Resolving Incomplete Objects

Knowledge Check Questions

Module 10. Managing Family Tables

- i. Family Table Overview
- ii. Viewing Family Table Information
- iii. Creating Family Tables
- iv. Managing Family Tables
- v. Generic Modification Matrix
- vi. Individual Instance Modification Matrix
- vii. Modifying Family Tables
- viii. Modify Instance Parameters/Attributes in a Workspace
- ix. Saving Family Table Items as New Items

Knowledge Check Questions

Module 11. Managing CAD Data

- i. Introduction to Workspace Frames
 - ii. Accessing Workspace Frames
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- iii. Workspace Frames Details
- iv. Updating and Synchronizing Workspace Objects
 - v. Updating CAD Documents in the Workspace
 - vi. Synchronizing Objects in the Workspace
- vii. Importing and Exporting CAD Data
- viii. Importing CAD Data
- ix. Exporting CAD Data
 - x. Retrieving Simplified Representations On-the-Fly
 - xi. Using Flexible Components

Knowledge Check Questions

Module 12. Managing Your Work

- i. Managing Your Work
- ii. Managing Tasks
- iii. Managing the Notebook
- iv. Managing Subscriptions
- v. Creating Subscriptions
- vi. Preference Manager
- vii. Setting Attachment Preferences
- viii. Setting Search Preferences
- ix. Setting Display Preferences
- x. Setting Table Preferences
- xi. Setting Visualization Preferences
- xii. Using the Windchill Clipboard
- xiii. Software Downloads
- xiv. Introduction to Communication Mechanisms
- xv. E-mailing Team Members
- xvi. E-mailing a Page
- xvii. Holding Discussions

Knowledge Check Questions

Module 13. Participating in Processes

- i. Participating in Processes
- ii. Completing Tasks
- iii. Completing Promotion Tasks
- iv. Viewing Processes
- v. Reassigning Workflow Tasks
- vi. Managing Your Calendar

Knowledge Check Questions

Business Administration of Pro/INTRALINK 10.2

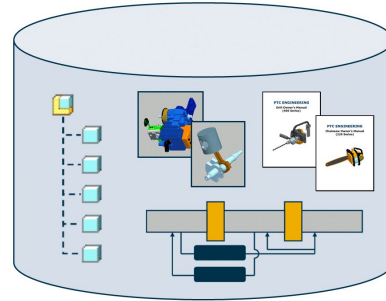
Overview

Course Code TRN-4332-T

Course Length 3 Days

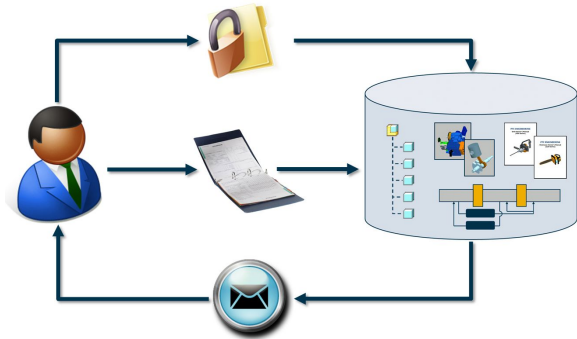
In this course, you will gain an understanding of basic Pro/INTRALINK administration tasks. You will learn how to plan and create user accounts and groups as well as information management storage strategies. Other topics include life cycles, contexts, teams, and configuring domain policies. These skills enable a business administrator to configure Pro/INTRALINK to meet business needs. After completing this course, you will be well prepared to set up and manage a basic Pro/INTRALINK implementation at your company.

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 Pro/FICIENCY intended to evaluate your understanding of the course as a whole.



Course Objectives

- Understand the processes involved in defining your business environment
- Identify the use of a Windchill Organization
- Create and manage user accounts and groups
- Identify best practices for managing groups and user accounts
- Identify contexts and their relationships
- Assign product and library creators
- Create and manage product and library contexts
- Identify Windchill object names and their corresponding object type class names
- Create Global Attributes
- Add attributes to a Windchill Type
- Create a Windchill Type
- Identify and set object initialization rules
- Implement custom versioning sequences
- Create and define life cycle and workflow templates
- Associate life cycle and workflow templates
- Understand the Windchill domain policy architecture
- Define access control policies



- Identify individual access control permissions
- Administer and troubleshoot access control lists
- Define notification policies
- Define indexing policies
- Use Context Teams to apply access control
- Use Context Teams and team templates to conduct workflow role resolution
- Create and manage document templates within product, library, and organization contexts
- Identify how to create CAD document templates
- Create product and library context templates
- Create, manage, and edit promotion preferences
- Identify the promotion review and approval processes
- Use ModelCHECK validation during Check In
- Administer administrator-saved searches
- Administer user profiles
- Administer calendar functions
- Administer organization preferences
- Identify the report manager functions
- Identify visualization publishing controls
- Identify purge manager functions
- Audit system events

Prerequisites

- Introduction to Pro/INTRALINK 10.2

Audience

- This course is intended for business administrators, system administrators, and project team leaders. Implementation team members, including user adoption team members and those with general Pro/INTRALINK administration responsibilities, will also benefit from taking this course.

Agenda

Day 1

Module	1	Introduction to Windchill Business Administration
Module	2	Managing Participants
Module	3	Managing Contexts
Module	4	Managing Objects, Object Types, and Object Attributes

Day 2

Module	5	Managing Object Type Behavior
Module	6	Automating Processes Using Life Cycles and Workflows
Module	7	Managing Teams
Module	8	Managing Domain Policies and Access Control

Day 3

Module	9	Managing Organization Templates
Module	10	Implementing Promotion and Change Processes
Module	11	Administrative Support Tools
Module	12	Creo Parametric Data Administration

Course Content

Module 1. Introduction to Windchill Business Administration

- i. Windchill PDMLink
- ii. Arbortext Content Manager Solution
- iii. Windchill ProjectLink Solution
- iv. Pro/INTRALINK Solution
- v. Windchill Architecture — Server
- vi. Windchill Architecture — Client
- vii. Windchill Architecture — Database
- viii. Windchill Architecture — Optional Servers
- ix. Understanding Windchill Terminology
- x. Understanding Primary Business Objects
- xi. Understanding Policies, Processes, and Participants
- xii. Role of the Business Administrator
- xiii. Planning a Windchill Implementation
- xiv. Identifying the Data to be Managed
- xv. Common Windchill Objects
- xvi. Managing Participants
- xvii. Identifying a Data Storage Strategy
- xviii. Identifying Business Processes
- xix. Identifying How Users Interact with Data
- xx. Identifying a Notification Strategy

Knowledge Check Questions

Module 2. Managing Participants

- i. Participant Architecture
 - ii. Identifying Windchill Users
 - iii. Users and Groups
 - iv. User Accounts
 - v. Groups
 - vi. User and Group Structure
 - vii. Best Practices for Organizations, Users, and Groups
 - viii. Introduction to Windchill Contexts
 - ix. Administrative Navigation
 - x. Creating a Windchill Organization Context
 - xi. Creating Users and Groups
 - xii. Creating User Accounts
 - xiii. Troubleshooting User Accounts
 - xiv. Creating Groups
 - xv. Group Membership
 - xvi. Managing Existing Participants
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- xvii. Moving Users Between Organizations
- xviii. Updating User Account Information
- xix. Deleting a User Account — Steps
 - xx. Identify the Results of Deleting a User
- xxi. Business Process Implications of Deleting Users
- xxii. Workspace Implications of Deleting Users
- xxiii. Running Process Implications of Deleting Users
- xxiv. Deleting a User Account
- xxv. Deleting Groups
- xxvi. Results of Deleting a Group
- xxvii. Business Process Implications of Deleting Groups
- xxviii. Deleting an Organization

Knowledge Check Questions

Module 3. Managing Contexts

- i. Understanding Contexts
- ii. Relationships Between Contexts
- iii. Identifying Locations for Storing Data
- iv. Windchill Product Characteristics
- v. Results of Creating a Product
- vi. Windchill Library Characteristics
- vii. Results of Creating a Library
- viii. Windchill Project Characteristics
- ix. Windchill Program Characteristics
- x. Results of Creating a Project or Program
- xi. Assigning Context Creators
- xii. Creating Products
- xiii. Creating Libraries
- xiv. Creating Projects and Programs
- xv. Using Folders
- xvi. The Move Action
- xvii. Moving an Object

Knowledge Check Questions

Module 4. Managing Objects, Object Types, and Object Attributes

- i. Windchill Objects Review
 - ii. Types of Attributes
 - iii. Modeled Attributes
 - iv. Standard and Global Attributes
 - v. Calculated and Alias Attributes
 - vi. Windchill Object Typing Capability
 - vii. Creating Global Attributes
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- viii. Extending and Subtyping Objects
- ix. Constraining Attributes
- x. Types of Constraints
- xi. Constraining Strings to a Set of Values
- xii. Conditional Constraints
- xiii. The Type and Attribute Manager – Types
- xiv. The Type and Attribute Manager – Enumerations
- xv. Adding Attributes to Types
- xvi. New Attribute Wizard – Page 1
- xvii. New Attribute Wizard – Page 2
- xviii. New Attribute Wizard – Page 3
- xix. Managing Attribute Constraints
- xx. Managing Attribute Visibility
- xxi. Creating Subtypes
- xxii. Managing Type Layouts
- xxiii. Inheriting Type Layouts
- xxiv. Creating Shared Tabs
- xxv. Localizing Types and Attributes
- xxvi. Windchill Link Typing Capability
- xxvii. Identifying Link Behavior
- xxviii. The Relationship Constraint Manager
- xxix. Creating a Relationship Constraint
- xxx. Measurement System Administration
- xxxi. Quantity of Measure Administration

Knowledge Check Questions

Module 5. Managing Object Type Behavior

- i. Object Initialization Rules
- ii. Object Initialization Rule Management
- iii. Object Types Managed by Object Initialization Rules
- iv. Object Initialization Rule Example
- v. Life Cycle Association Rules
- vi. Team Template Association Rules
- vii. Object Numbering Scheme Rules
- viii. Custom Numbering Scheme Rules
- ix. Folder Path Rules
- x. Versioning Scheme Rules
- xi. Types of Harvard Versioning Schemes
- xii. File and State-Based Versioning
- xiii. File and State-Based Versioning (cont.)

Knowledge Check Questions

Module 6. Automating Processes Using Life Cycles and Workflows

- i. Identifying Business Processes
- ii. Assess Your Business Processes
- iii. Identifying Process Management Objects
- iv. Understanding Windchill Life Cycles
- v. Understanding Windchill Life Cycle Types
- vi. Defining Object Life Cycle Resolution
- vii. Creating a Life Cycle
- viii. Specifying Life Cycle Properties
- ix. Adding Life Cycle States
- x. Defining States
- xi. Identifying Life Cycle State Names
- xii. Identifying a Version Series
- xiii. State-Based Versioning Example
- xiv. Understanding Transitions
- xv. Defining Transitions
- xvi. Understanding Life Cycle Transition Types
- xvii. Understanding Life Cycle Transition Types
- xviii. Understanding Life Cycle Transition Types
- xix. Understanding Life Cycle Transition Types
- xx. Understanding Life Cycle Transition Types
- xxi. Transition Examples
- xxii. Defining Role Participation
- xxiii. Defining Access Permissions using Life Cycles
- xxiv. Selecting Workflow Templates
- xxv. Life Cycle and Workflow Template Relationships
- xxvi. Life Cycle and Workflow Template Relationships
- xxvii. Life Cycle Best Practices
- xxviii. Defining Workflow Templates
- xxix. Defining Workflow Templates
- xxx. Defining Workflow Template Properties
- xxxi. Understanding Assigned Activities
- xxxii. Defining Assigned Activities
- xxxiii. Understanding Connectors and Terminals
- xxxiv. Using Links
- xxxv. Setting Link Properties
- xxxvi. Simplifying Complex Processes
- xxxvii. Using Robots to Automate Tasks
- xxxviii. Creating a Workflow Template

Knowledge Check Questions

Module 7. Managing Teams

- i. Team Management
 - ii. Terminology – Context Team
 - iii. Terminology – Shared Team
 - iv. Terminology – Team Template
 - v. Terminology – Team Instance
 - vi. Terminology – Context and Participant Groups
 - vii. Terminology – Context and Resource Bundle Roles
 - viii. Context Teams
 - ix. Context Team Architecture
 - x. Context Team Architecture (cont.)
 - xi. Context Team Architecture Example
 - xii. Context Team Architecture Example (cont.)
 - xiii. Context Team Architecture Example (cont.)
 - xiv. Context Team Architecture Example (cont.)
 - xv. Applying Access Control with Context Teams
 - xvi. Access Control for Application Context Templates
 - xvii. Best Practices for Using Context Teams for Access Control
 - xviii. Shared Teams
 - xix. Shared Teams Show Team Uses Query
 - xx. Using a Shared Team
 - xxi. Role Resolution with Teams
 - xxii. Understanding Role Resolution and Team Templates
 - xxiii. Understanding Role Resolution and Context Teams
 - xxiv. Understanding Role Resolution and Team Instances
 - xxv. Team Instance Definition
 - xxvi. Team Instance Definition (cont.)
 - xxvii. Defining Object Team Template Resolution
 - xxviii. Creating Team Templates
 - xxix. Proper Team Role Resolution
 - xxx. Team Role Resolution Best Practices
 - xxxi. Product and Library Template Context Team Roles
 - xxxii. Project and Program Template Context Team Roles
 - xxxiii. Guests Context Role
 - xxxiv. Members Context Role
 - xxxv. Application Context Manager Role
 - xxxvi. Change Administrator and Change Review Board Context Roles
 - xxxvii. Promotion Approvers and Reviewers Context Roles
 - xxxviii. Organization Roles
 - xxxix. Application Context Roles
 - xl. Custom Resource Bundle Roles
 - xli. Team Management Best Practices
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*Knowledge Check Questions***Module 8. Managing Domain Policies and Access Control**

- i. Windchill Context Architecture
- ii. Cabinets
- iii. Administrative Domains
- iv. Defining Windchill Domain Architecture
- v. Defining Windchill User Domain Architecture
- vi. Defining Windchill System Domain Architecture
- vii. Defining Windchill Special Site Domain Architecture
- viii. Defining Windchill Data Domain Architecture
- ix. Defining Windchill Private Domain Architecture
- x. Defining Windchill Folder Domain Architecture
- xi. Domain Architecture in the Policy Administrator
- xii. Security Labeled Objects
- xiii. Understanding Access Control
- xiv. Planning Access Control Strategies
- xv. Defining Access Control Permissions
- xvi. Permissions Needed for Move Operations
- xvii. Permissions Needed for Set Life Cycle State Operations
- xviii. Permissions Needed for Change Identify Operations
- xix. Permissions Needed for View/Download Content Operations
- xx. Permissions Needed for Modify Content Operations
- xxi. Defining Access Control Policy Rules
- xxii. Access Control Permission Considerations
- xxiii. Access Control Permission Considerations (cont.)
- xxiv. Domain Access Control Permission Rules
- xxv. Best Practices for Applying Access Control Rules
- xxvi. Ad-Hoc Access Control
- xxvii. Checking Access Control Permissions
- xxviii. Troubleshooting Access Control Issues
- xxix. Defining a Notification Policy
- xxx. Implementing a Notification Policy
- xxxi. Troubleshooting Context-Based Notifications
- xxxii. Defining an Indexing Policy
- xxxiii. Implementing an Indexing Policy

*Knowledge Check Questions***Module 9. Managing Organization Templates**

- i. Windchill Templates
 - ii. Context Templates
 - iii. Template Access
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- iv. Creating Document Templates
- v. Creating CAD Document Templates
- vi. Creating a Context Template
- vii. Out-of-the-Box Project and Program Templates
- viii. Out-of-the-Box Product and Library Templates
- ix. Organization Templates
- x. Actions for Context Templates

Knowledge Check Questions

Module 10. Implementing Promotion and Change Processes

- i. Setting Up a Change Management Process
 - ii. Windchill Change Management
 - iii. Windchill Change Management Components
 - iv. Windchill Change Objects
 - v. Identifying Change Management Life Cycles
 - vi. Identifying Change Management Workflow Templates
 - vii. Problem Report Life Cycle
 - viii. Problem Report Workflow
 - ix. Change Request Life Cycle
 - x. Change Request Workflow
 - xi. Change Notice Life Cycle
 - xii. Change Notice Workflow
 - xiii. Business Rules
 - xiv. Implementing Business Rules – Change Notice Conditionals
 - xv. Implementing Business Rules – Change Notice Code
 - xvi. Implementing Business Rules – Change Notice Activity
 - xvii. Business Rule Sets
 - xviii. Business Rules and Links
 - xix. Creating and Editing Business Rules
 - xx. Change Activity/Change Notice Task Life Cycle
 - xxi. Change Activity/Change Notice Task Workflow
 - xxii. Process and Life Cycle Relationships
 - xxiii. Identifying Change Management Team Templates
 - xxiv. Assigning Participants to Change Management Roles
 - xxv. Configuring Change Management Preferences, Policies, and Rules
 - xxvi. Configuring Change Management Preferences and Administration
 - xxvii. Managing Promotion Preferences
 - xxviii. Understanding the Promote Action in a Basic Life Cycle
 - xxix. The Promotion Request Approval Process
 - xxx. The Promotion Request Review Process
 - xxxi. Managing Promotion Preference Processes
 - xxxii. Creating a New Promotion Process Preference
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xxxiii. Changing a Promotion Preference

Knowledge Check Questions

Module 11. Administrative Support Tools

- i. Using ModelCHECK Validation During Check In
- ii. Administrator-Saved Searches
- iii. User Profiles
- iv. Windchill Views
- v. Configuring Custom Views
- vi. Calendar Management
- vii. Preference Management
- viii. Report Management
- ix. Report Manager Queries
- x. Visualization Publishing Tools
- xi. Visualization Configuration Administrator
- xii. Publish and Thumbnail Control
- xiii. WVS Job Monitor
- xiv. WVS Job Scheduler Administrator
- xv. Purge Manager
- xvi. Purge Manager Queries
- xvii. Security Auditing and Usage Reporting
- xviii. Usage Reporting
- xix. Security Audit Reporting

Knowledge Check Questions

Module 12. Creo Parametric Data Administration

- i. Creo Parametric Installation
 - ii. Creo Parametric Installation Folders
 - iii. Understanding Windchill Architecture
 - iv. Multiple Creo Parametric Configurations (Windows Only)
 - v. Editing a Creo Parametric Startup File (Windows Only)
 - vi. Creo Parametric Client Configuration Elements
 - vii. Creo Parametric Client Configuration Environment Variables
 - viii. Creo Parametric Client Configuration Files
 - ix. Creo Parametric Connection to Windchill Configuration Options
 - x. Creo Parametric Retrieval Configuration Options
 - xi. Windchill Integration – Embedded or Separate Browser
 - xii. Registering a Windchill Server
 - xiii. Windchill Preference Management
 - xiv. Workgroup Manager Client Preferences
 - xv. Operation Preferences
 - xvi. Workspace Preferences
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- xvii. Other Windchill CAD Related Preferences
- xviii. Type and Attribute Management
- xix. Specifying the EPM Document Subtype
 - xx. Mapping Creo Parametric Parameters to Windchill Attributes
- xxi. Parameter to Attribute Mapping
- xxii. Versioned Versus Non-Versioned Attributes
- xxiii. Object Initialization Rules
- xxiv. CAD Document Naming and Numbering
 - xxv. Naming and Numbering Design Documents
- xxvi. CAD Document Naming and Numbering Policies
- xxvii. Autonumbering Policy
- xxviii. Custom Policy
 - xxix. Parameter-Driven Policy
 - xxx. Name-Driven Policy
- xxxi. Client Preferences For Naming and Numbering
- xxxii. Renaming Design Documents
- xxxiii. Using ModelCHECK to Authorize Check In
- xxxiv. Configuring Printing in Creo Parametric
 - xxxv. Creo Parametric Configuration Checklist
 - xxxvi. Creo Parametric Configuration Checklist (cont.)
 - xxxvii. Creo Parametric Configuration Checklist (cont.)
 - xxxviii. Creo Parametric Configuration Checklist (cont.)

Knowledge Check Questions

System Administration of Windchill 10.2

Overview

Course Code	TRN-4340-T
Course Length	3 Days

In this course, you will gain an understanding of how to perform routine Windchill system administration tasks, including how to manage Windchill services and optimize Windchill components for performance. You will focus on daily, weekly, and monthly system maintenance tasks required by the Windchill system administrators. You will also learn how to install and configure Windchill system components and how to implement file vaulting and content replication. Other topics that will be reviewed include managing an Oracle database, troubleshooting background queues, controlling system backup procedures, and setting up the client environment.

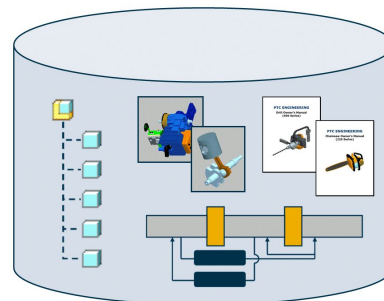
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Note: Due to the subject matter of this class, simulated software is used for Windchill installation to provide an accurate, effective, and efficient training experience that could not otherwise be duplicated in a standard classroom environment.



Course Objectives

- Understand Windchill architecture
- Install and configure Windchill solutions
- Start and stop Windchill components
- Manage Windchill configuration properties
- Implement file vaulting and content replication
- Tune Windchill components for performance
- Tune Windchill workflows for performance
- Manage background queues
- Manage Oracle database
- Manage system backups
- Manage Windchill system logs and alerts
- Monitor daily, weekly, and monthly administration tasks
- Configure browser and JAVA settings for clients



Prerequisites

- Familiarity with the Windchill PDMLink 10.1 or Windchill ProjectLink 10.1 user interface
- Familiarity with the Windows command prompt and the ability to form and execute basic SQL statements

Audience

- This course is intended for System Administrators and Application Developers. People in related roles will also benefit from taking this course.
-

Agenda

Day 1

Module	1	Introduction to the Windchill System Environment
Module	2	Installing Windchill Components
Module	3	Managing Windchill Services
Module	4	Managing Windchill Properties
Module	5	File Vaulting and Replication Overview
Module	6	Implementing File Vaults
Module	7	Implementing Content Replication

Day 2

Module	8	Tuning Windchill Server
Module	9	Managing Background Queues
Module	10	Tuning Workflow Processes
Module	11	Oracle Database Management
Module	12	Windchill Backup and Recovery

Day 3

Module	13	Managing Log Files and Alerts
Module	14	System Monitoring — Daily Tasks
Module	15	System Monitoring — Weekly Tasks
Module	16	System Monitoring — Monthly Tasks
Module	17	Setting up the Client Environment

Course Content

Module 1. Introduction to the Windchill System Environment

- i. Client Requirements
- ii. Windchill Architecture — Windchill Server
- iii. Windchill Architecture — Database
- iv. Windchill Architecture – Optional Servers
- v. Role of the System Administrator
- vi. Understanding Windchill Contexts
- vii. Windchill Product Characteristics
- viii. Windchill Library Characteristics
- ix. Using Folders
- x. Data Management Objects
- xi. Iteration and Revision Controls
- xii. Access Controls
- xiii. Process Controls
- xiv. Understanding the Windchill User Interface
- xv. Using the Navigator
- xvi. Navigating Products and Libraries
- xvii. Locating Information
- xviii. Understanding Information Pages
- xix. Accessing Help

Knowledge Check Questions

Module 2. Installing Windchill Components

- i. Windchill Software Matrices
- ii. Supported Virtualization Platforms
- iii. Sizing a Windchill System
- iv. Setting Application Name
- v. Software Downloads
- vi. Windchill Technical Documents
- vii. Windchill Required Components
- viii. Installing Oracle
- ix. Oracle Post Installation Activities
- x. The PTC Solution Installer (PSI)
- xi. Understanding Installation Types
- xii. Selecting the Database Size
- xiii. The Staging Area Options
- xiv. Installing Windchill Solution
- xv. Installing on Multiple Machines
- xvi. Installing Optional Components

Knowledge Check Questions

Module 3. Managing Windchill Services

- i. Identifying Major Windchill Services
- ii. Starting/Stopping Apache Web Server
- iii. Starting/Stopping Windchill Directory Server
- iv. Starting/Stopping Oracle
- v. Starting/Stopping Windchill
- vi. Running Apache as a Windows Service
- vii. Windchill Directory Server Control Panel
- viii. Running Windchill Directory Server as a Service
- ix. Running Windchill as a Windows Service
- x. Automating Windchill Startup
- xi. Automating Windchill Shutdown

*Knowledge Check Questions***Module 4. Managing Windchill Properties**

- i. System Administration Utilities
- ii. The Windchill Command
- iii. The Windchill Shell
- iv. Windchill Configuration Properties Files
- v. The site.xconf File
- vi. The JMX Clients
- vii. Using JConsole to Modify Property Values
- viii. The xconfmanager Utility
- ix. The xconfmanager — Options
- x. The xconfmanager – Example
- xi. The xconfmanager – Validate Changes
- xii. Properties Managed by the Windchill Configuration Assistant
- xiii. Creating a Custom XCONF File

*Knowledge Check Questions***Module 5. File Vaulting and Replication Overview**

- i. File Vaulting
 - ii. File Storage Options
 - iii. Local File Vaulting Architecture
 - iv. Content Replication
 - v. Content Replication Architecture
 - vi. Windchill File Servers
 - vii. Centrally Vaulted Content
 - viii. Remotely and Centrally Vaulted Content
 - ix. File Vaulting Strategies
 - x. Types of File Vaults
 - xi. Checking an Object into a Windchill Main Server
-

- xii. Requesting Objects That Have Not Yet Been Replicated
- xiii. Requesting Objects from File Servers That Are Not Preferred
- xiv. Server to Server Replication
- xv. Content Synchronization and Replication
- xvi. Local Replication for File Servers

Knowledge Check Questions

Module 6. Implementing File Vaults

- i. Planning External File Storage
- ii. Multiple Vaults Configuration
- iii. Vaulting Rules
- iv. Single Vault Configuration
- v. Forcing Contents to a Single Vault — Implications
- vi. Single Vault vs. Multi Vault Configuration
- vii. Vaults with Automatic Folder Creation
- viii. The Central Cache Vault
- ix. Setting Up External Storage
- x. Managing Revaulting
- xi. Maintaining Vaults
- xii. Changing the Location of Files in Vaults
- xiii. The Default System Target Vault

Knowledge Check Questions

Module 7. Implementing Content Replication

- i. Installing the File Server — Requirements
- ii. Enabling Remote File Server Support
- iii. Generating the Security Key
- iv. Using the File Server Management Utility
- v. Registering the File Server
- vi. Configuring Replica Vaults
- vii. Creating Replication Rules
- viii. Creating Replication Schedules
- ix. Replication Performance and Scalability
- x. Replication and Visualization Service
- xi. Setting the Preferred File Server
- xii. User-Initiated Replication

Knowledge Check Questions

Module 8. Tuning Windchill Server

- i. Windchill Server Tuning Objectives
 - ii. Monolithic Windchill Configuration
 - iii. Multi-Tiered Windchill Configuration
 - iv. Server Heap Size
-

- v. Setting Windchill Cache Sizes — wt.properties
- vi. Setting Windchill Cache Sizes — db.properties
- vii. Viewing Windchill Cache Statistics
- viii. Limiting Search Results
- ix. Windchill Configuration Assistant (WCA)
 - x. Affected Files
 - xi. Running the Windchill Configuration Assistant
- xii. Propagating Values from Intermediate Properties Files
- xiii. Rolling Back Configuration Changes
- xiv. Number of Method Servers
- xv. Cleaning Windchill System Cache
- xvi. Why Do Windchill Method Servers Stop Unexpectedly?
- xvii. Using Anti-Virus Software
- xviii. Server Cluster Configuration
 - xix. Server Status
 - xx. WAN Performance Optimizing Options
 - xxi. WAN Acceleration

Knowledge Check Questions

Module 9. Managing Background Queues

- i. Windchill Background Queues
- ii. Queue Manager
- iii. Queue Entry States
- iv. Out-of-the-Box Background Queues
- v. Single Method Server Configuration
- vi. Configuring a Background Method Server
- vii. Configuring Multiple Background Servers
- viii. Distributing Background Queues
- ix. Tuning Background Queues
 - x. Performing Regular Queue Maintenance
 - xi. Deleting a Queue

Knowledge Check Questions

Module 10. Tuning Workflow Processes

- i. Workflow Queues
 - ii. Pool Queues
 - iii. Monitoring Workflow Queue Entries
 - iv. Configuring Queue Pooling
 - v. After Queue Pooling
 - vi. Configuring Dedicated Workflow Queues
 - vii. Tagging Dedicated Workflow Queues
 - viii. After Dedicated Queues
-

*Knowledge Check Questions***Module 11. Oracle Database Management**

- i. Reviewing Instance and Database
- ii. System Global Area (SGA)
- iii. Reviewing Background Processes
- iv. Understanding Oracle Storage Hierarchy
- v. Oracle Enterprise Manager Database Control
- vi. Oracle Initialization Parameters
- vii. Control Files
- viii. Oracle Tablespace
- ix. Oracle Datafiles
- x. Redo Log Files
- xi. Automatic Memory Management (AMM)
- xii. Automatic Shared Memory Management (ASMM)
- xiii. Approximating Initial Memory Sizes
- xiv. Automatic Workload Repository (AWR)
- xv. Automatic Database Diagnostic Monitor (ADDM)

*Knowledge Check Questions***Module 12. Windchill Backup and Recovery**

- i. Windchill Backup Architecture
 - ii. Windchill Data Repositories
 - iii. Types of Backup
 - iv. Performing a Cold Backup
 - v. Recovering from a Cold Backup
 - vi. Performing a Hot Backup
 - vii. Recovering from a Hot Backup
 - viii. Oracle Backup and Recovery — Enterprise Manager
 - ix. Oracle Archive Log Mode
 - x. Oracle Flash Recovery Area
 - xi. Oracle Suggested Backup Strategy
 - xii. Suspending Background Queues
 - xiii. Read Only Mode for Vaults
 - xiv. Generating Vault Backup Information
 - xv. The WContentVerify Tool
 - xvi. Mirroring the Local Cache Vault
 - xvii. Rebuilding Replica Vaults
 - xviii. Backing up the Windchill Directory Server
 - xix. Backing Up LDAP Data using the Backup Command
 - xx. Restoring Windchill Directory Server
 - xxi. Backing Up LDAP Directory Data using Control Panel
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- xxii. Restoring LDAP Directory Data using Control Panel
- xxiii. Exporting LDAP Data
- xxiv. Importing LDAP Data

Knowledge Check Questions

Module 13. Managing Log Files and Alerts

- i. Windchill Logging Mechanism
- ii. Windchill Log Properties
- iii. Setting Windchill Log Levels
- iv. Populating JMX-Administrators
- v. Viewing Windchill Log Files
- vi. Managing Log Files using JConsole
- vii. System Error Reporting
- viii. Using the Persisted Log Events Page
- ix. The Log File Viewer Page
- x. The Log Event Details Page
- xi. Administration Actions After Receiving Error Reports
- xii. System Configuration Collector
- xiii. Oracle Alerts
- xiv. Oracle Alerts — Setting Up a Mail Server
- xv. Setting Up Direct Oracle Alert Notifications
- xvi. Oracle Alerts — Setting Metric Thresholds
- xvii. Managing Directory Server Logs
- xviii. Managing Web Server Logs

Knowledge Check Questions

Module 14. System Monitoring — Daily Tasks

- i. Daily System Monitoring Tasks — Checklist
 - ii. Perform and Verify Scheduled System Backups
 - iii. The Server Status Page
 - iv. PTC System Monitor
 - v. System Monitoring using JMX Clients
 - vi. Monitoring CPU and Memory Usage by Windchill Processes
 - vii. System Components Availability
 - viii. Monitoring Queues using Queue Manager
 - ix. Monitoring Queues using JMX Clients
 - x. Monitoring Queues using Queue Analyzer
 - xi. Queue and Workflow Health Check Script
 - xii. Monitor File Vaults
 - xiii. Monitoring Vaults using the System Configuration Collector
 - xiv. Review Application Server Logs
 - xv. Review Database Logs
-

- xvi. Check Database Schema Statistics
- xvii. Monitor Network Health
- xviii. Review PTC Technical Support Subscription E-mails

Knowledge Check Questions

Module 15. System Monitoring — Weekly Tasks

- i. Weekly System Monitoring Tasks — Checklist
- ii. Monitor Disk Space Usage
- iii. Identifying BLOBS That Have Not Been Vaulted
- iv. Remove Unreferenced Files from File Vaults
- v. The RemoveUnreferencedFiles Tool
- vi. Automated Cleanup of Replica Vaults
- vii. Generating Unreferenced Files Report
- viii. Defragment Windows Disks
- ix. Check Performance using Monitoring Tools
- x. Perform Database Maintenance

Knowledge Check Questions

Module 16. System Monitoring — Monthly Tasks

- i. Monthly System Monitoring Tasks — Checklist
- ii. Execute Performance Benchmarks
- iii. Windchill File Server Test
- iv. Perform Database Diagnostics
- v. Resolve Disconnected Principals
- vi. Cleaning up Data for Deleted Users
- vii. Evaluate System Settings using Windchill Configuration Assistant
- viii. Generate Throughput and Security Audit Reports
- ix. Perform Workgroup Manager Maintenance Tasks
- x. Review Windchill and Creo Settings
- xi. Purge Obsolete or Unused Data
- xii. Apply Maintenance Patches and Updates
- xiii. Clone Production Server to Test Server
- xiv. Yearly Administrative Tasks

Knowledge Check Questions

Module 17. Setting up the Client Environment

- i. Setting Up Your Browser
 - ii. Browser's ActiveX Settings
 - iii. Pop-Up Blocker Interference
 - iv. Browser Locale Settings
 - v. Memory Allocation for Applets
 - vi. Installing Creo View
 - vii. Installing Desktop Integration
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- viii. Setting Your Preferred File Server Site
- ix. Product Structure Explorer Preferences
- x. Configuring the Windchill Home Page

Knowledge Check Questions

Web Based Curriculum Guide

- Introduction to Pro/INTRALINK 10.2
- Business Administration of Pro/INTRALINK 10.2
- System Administration of Windchill 10.2



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Introduction to Pro/INTRALINK 10.2

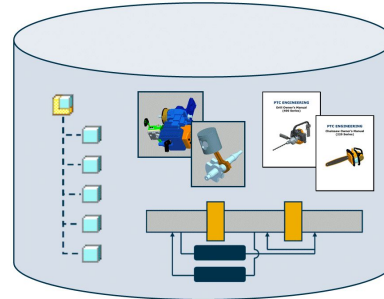
Overview

Course Code WBT-4271-0

Course Length 16 Hours

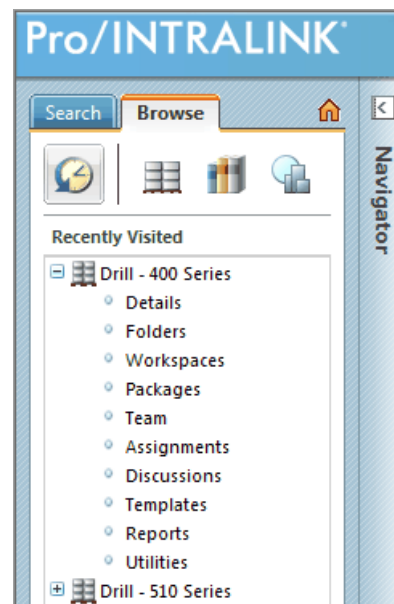
In this course, you will learn how to complete basic functions to navigate and view information within Pro/INTRALINK. You will discover how to access and navigate the Pro/INTRALINK environment, view product information, use Pro/INTRALINK's visualization tools, manage assigned tasks, and perform basic work management functions. Additionally, you will be taught the key capabilities and features of Pro/INTRALINK CAD Data Management and how to use Pro/INTRALINK to manage Creo design information. Specifically, you will focus on the day-to-day data management tasks required by the Creo user community. You will also learn how to use Pro/INTRALINK to perform basic PDM functions on Creo CAD Documents.

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 Pro/FICIENCY intended to evaluate your understanding of the course as a whole.



Course Objectives

- Understand the Pro/INTRALINK environment and terminology
- Locate design information
- View design information
- Understand visualization concepts and terminology
- Use Creo View Lite to view product information
- Use Pro/INTRALINK tools to manage your work
- Participate in Pro/INTRALINK processes
- Understand Pro/INTRALINK architecture
- Understand workspaces and how workspaces are used



- Create new designs and share design information
- Modify and manage existing design information
- Understand file relationships and dependencies
- Manage family tables
- Use workspace frames

Prerequisites

- Basic browser and Web navigation skills
- Working knowledge of Creo

Audience

- This course is intended for users who need to access the Pro/INTRALINK system to view information; check in, check out, or view Creo CAD data; perform system tasks; or use product information when making business decisions

Table of Contents

Module	1	Introduction to the Windchill Environment
Module	2	Locating Information
Module	3	Viewing Information
Module	4	Introduction to Visualization
Module	5	Creating and Managing Documents
Module	6	Getting Started with Creo Parametric Data Management
Module	7	Initiating New Designs and Sharing Design Data
Module	8	Modifying and Managing Design Data
Module	9	Understanding File Relationships and Dependencies
Module	10	Managing Family Tables
Module	11	Managing CAD Data
Module	12	Managing Your Work
Module	13	Participating in Processes

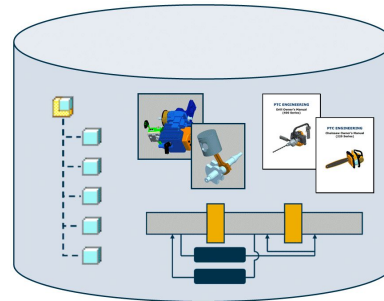
Business Administration of Pro/INTRALINK 10.2

Overview

Course Code	WBT-4332-0
Course Length	24 Hours

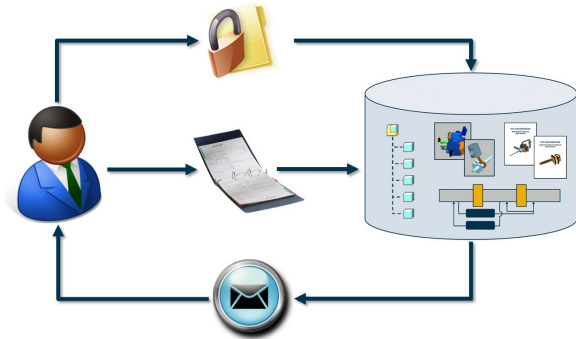
In this course, you will gain an understanding of basic Pro/INTRALINK administration tasks. You will learn how to plan and create user accounts and groups as well as information management storage strategies. Other topics include life cycles, contexts, teams, and configuring domain policies. These skills enable a business administrator to configure Pro/INTRALINK to meet business needs. After completing this course, you will be well prepared to set up and manage a basic Pro/INTRALINK implementation at your company.


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 Pro/FICIENCY intended to evaluate your understanding of the course as a whole.



Course Objectives

- Understand the processes involved in defining your business environment
- Identify the use of a Windchill Organization
- Create and manage user accounts and groups
- Identify best practices for managing groups and user accounts
- Identify contexts and their relationships
- Assign product and library creators
- Create and manage product and library contexts
- Identify Windchill object names and their corresponding object type class names
- Create Global Attributes
- Add attributes to a Windchill Type
- Create a Windchill Type
- Identify and set object initialization rules
- Implement custom versioning sequences
- Create and define life cycle and workflow templates
- Associate life cycle and workflow templates
- Understand the Windchill domain policy architecture
- Define access control policies



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- Identify individual access control permissions
 - Administer and troubleshoot access control lists
 - Define notification policies
 - Define indexing policies
 - Use Context Teams to apply access control
 - Use Context Teams and team templates to conduct workflow role resolution
 - Create and manage document templates within product, library, and organization contexts
 - Identify how to create CAD document templates
 - Create product and library context templates
 - Create, manage, and edit promotion preferences
 - Identify the promotion review and approval processes
 - Use ModelCHECK validation during Check In
 - Administer administrator-saved searches
 - Administer user profiles
 - Administer calendar functions
 - Administer organization preferences
 - Identify the report manager functions
 - Identify visualization publishing controls
 - Identify purge manager functions
 - Audit system events

Prerequisites

- Introduction to Pro/INTRALINK 10.2

Audience

- This course is intended for business administrators, system administrators, and project team leaders. Implementation team members, including user adoption team members and those with general Pro/INTRALINK administration responsibilities, will also benefit from taking this course.
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Table of Contents

Module	1	Introduction to Windchill Business Administration
Module	2	Managing Participants
Module	3	Managing Contexts
Module	4	Managing Objects, Object Types, and Object Attributes
Module	5	Managing Object Type Behavior
Module	6	Automating Processes Using Life Cycles and Workflows
Module	7	Managing Teams
Module	8	Managing Domain Policies and Access Control
Module	9	Managing Organization Templates
Module	10	Implementing Promotion and Change Processes
Module	11	Administrative Support Tools
Module	12	Creo Parametric Data Administration

System Administration of Windchill 10.2

Overview

Course Code WBT-4340-T

Course Length 24 Hours

In this course, you will gain an understanding of how to perform routine Windchill system administration tasks, including how to manage Windchill services and optimize Windchill components for performance. You will focus on daily, weekly, and monthly system maintenance tasks required by the Windchill system administrators. You will also learn how to install and configure Windchill system components and how to implement file vaulting and content replication. Other topics that will be reviewed include managing an Oracle database, troubleshooting background queues, controlling system backup procedures, and setting up the client environment.

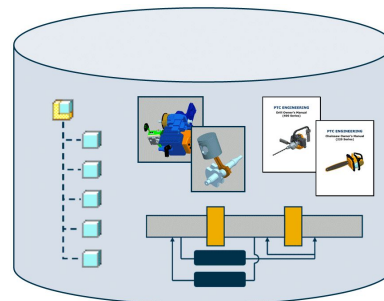
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- Tune Windchill components for performance
- Tune Windchill workflows for performance
- Manage background queues
- Manage Oracle database
- Manage system backups
- Manage Windchill system logs and alerts
- Monitor daily, weekly, and monthly administration tasks
- Configure browser and JAVA settings for clients



Prerequisites

- Familiarity with the Windchill PDMLink 10.1 or Windchill ProjectLink 10.1 user interface
- Familiarity with the Windows command prompt and the ability to form and execute basic SQL statements

Audience

- This course is intended for System Administrators and Application Developers. People in related roles will also benefit from taking this course.
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Module	15	System Monitoring — Weekly Tasks
Module	16	System Monitoring — Monthly Tasks
Module	17	Setting up the Client Environment
