

Business Administration of PTC Windchill PDM Essentials 11.1

Overview

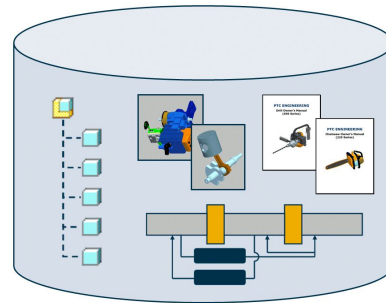
Course Code TRN-5261-T

Course Length 24 Hours

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

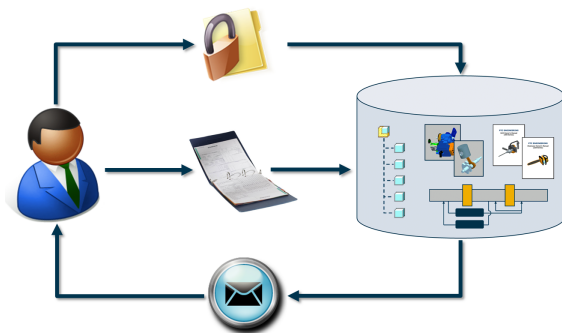
At the end of each module, you will complete a set of review questions to reinforce critical topics from that module. At the end of the course, you will complete a course assessment in PTC University Proficiency intended to evaluate your understanding of the course as a whole.

This course has been developed using Windchill 11.1 F000.



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 local, global, calculated, and alias attributes
- Create Windchill subtypes
- Configure attribute layouts



- 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 Windchill PDM Essentials 11.1

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 PDM Essentials 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. PTC Windchill PLM Solutions
- ii. The Windchill Server
- iii. The Windchill Client
- iv. The Windchill Database
- v. Optional Servers
- vi. Understanding Windchill Terminology
- vii. Understanding Primary Business Objects
- viii. Understanding Policies, Processes, and Participants
- ix. Role of the Business Administrator
- x. Common Windchill Objects
- xi. Configuring Object Types and Attributes
- xii. Managing Participants
- xiii. Identifying a Data Storage Strategy
- xiv. Identifying Business Processes
- xv. Managing Windchill Policies

Knowledge Check Questions

Module 2. Managing Participants

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

- xxii. Results of Deleting a Group
- xxiii. Business Process Implications of Deleting Groups

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. Assigning Context Creators
- ix. Creating Products
- x. Creating Libraries
- xi. Using Folders
- xii. The Move Action
- xiii. 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. Local and Global Attributes
 - v. Calculated and Alias Attributes
 - vi. Windchill Object Typing Capability
 - vii. The Type and Attribute Manager
 - viii. Creating Reusable Attributes
 - ix. Global Enumerations
 - x. Extending and Subtyping Objects
 - xi. Constraining Attributes
 - xii. Types of Constraints
 - xiii. Constraining Strings to a Set of Values
 - xiv. Adding Attributes to Types
 - xv. New Attribute Wizard - Page 1
 - xvi. New Attribute Wizard - Page 2
 - xvii. New Attribute Wizard - Page 3
 - xviii. Managing Attribute Constraints
 - xix. Managing Attribute Visibility
 - xx. Adding Columns to Types
 - xxi. Running the AddColumns Utility
-

- xxii. AddColumns Report and Addressing Warnings
- xxiii. Local and Global Attribute Comparison
- xxiv. Using Formulas in Calculated Attributes
- xxv. Alias Attribute Mapping
- xxvi. Managing Type Layouts
- xxvii. Inheriting Type Layouts
- xxviii. Creating Shared Tabs
- xxix. Creating Subtypes
- xxx. Localizing Types and Attributes
- xxxi. Graphical Attributes
- xxxii. Creating a Traffic Light Graphical Attribute
- xxxiii. Creating a Percent Complete Graphical Attribute
- xxxiv. Creating a Progress Bar Graphical Attribute
- xxxv. Error Conditions
- xxxvi. Measurement System Administration
- xxxvii. 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-Based and State-Based Versioning
- xiii. File-Based and State-Based Versioning (cont.)

Knowledge Check Questions

Module 6. Automating Processes Using Life Cycles and Workflows

- i. Assess Your Business Processes
 - ii. Identifying Process Management Objects
 - iii. Understanding Windchill Life Cycles
 - iv. Understanding Windchill Life Cycle Types
 - v. Defining Object Life Cycle Resolution
 - vi. Creating a Life Cycle
 - vii. Specifying Life Cycle Properties
-

- viii. Adding Life Cycle States
- ix. Identifying a Version Series
- x. State-Based Versioning Example
- xi. Understanding Transitions
- xii. Understanding Life Cycle Transition Types
- xiii. Transition Examples
- xiv. Defining Role Participation
- xv. Defining Access Permissions Using Life Cycles
- xvi. Selecting Workflow Templates
- xvii. Modular Workflow Approach
- xviii. Single Workflow Approach
- xix. Life Cycle Best Practices

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 Resource Bundle Roles
 - vii. Context Team Architecture
 - viii. The Team Members Context Group
 - ix. Context Team Architecture Example
 - x. Adding a New Context Role
 - xi. Adding a User to the Context Role
 - xii. Applying Access Control with Context Teams
 - xiii. Access Control for Application Context Templates
 - xiv. Best Practices for Using Context Teams for Access Control
 - xv. Shared Teams
 - xvi. Shared Teams Show Team Uses Query
 - xvii. Using a Shared Team
 - xviii. Role Resolution with Teams
 - xix. Understanding Role Resolution and Context Teams
 - xx. Understanding Role Resolution and Team Instances
 - xxi. Team Instance Definition
 - xxii. Team Instance Definition (cont.)
 - xxiii. Team Role Resolution Best Practices
 - xxiv. Guests Context Role
 - xxv. Members Context Role
 - xxvi. Application Context Manager Role
 - xxvii. Promotion Approvers and Reviewers Context Roles
-

- xxviii. Organization Roles
- xxix. Application Context Roles
- xxx. Custom Resource Bundle Roles
- xxxi. Team Management Best Practices

Knowledge Check Questions

Module 8. Managing Domain Policies and Access Control

- i. Planning Access Control Strategies
 - ii. Windchill Context Architecture
 - iii. Cabinets
 - iv. Administrative Domains
 - v. Defining Windchill Domain Architecture
 - vi. Defining Windchill User Domain Architecture
 - vii. Defining Windchill System Domain Architecture
 - viii. Defining Windchill Special Site Domain Architecture
 - ix. Defining Windchill Data Domain Architecture
 - x. Defining Windchill Private Domain Architecture
 - xi. Defining Windchill Folder Domain Architecture
 - xii. Domain Architecture in the Policy Administrator
 - xiii. Domain Access Control Rule - Components
 - xiv. Defining Access Control Permissions
 - xv. Explicitly Granting Access
 - xvi. Explicitly Denying Access
 - xvii. User Permissions
 - xviii. Inverse Deny
 - xix. Access at the Root Type - Example 1
 - xx. Access at the Root Type - Example 2
 - xxi. Using the Absolute Deny Permission
 - xxii. How Access Control Lists Work
 - xxiii. Permissions Needed for Move Operations
 - xxiv. Permissions Needed for Set Life Cycle State Operations
 - xxv. Permissions Needed for Change Identify Operations
 - xxvi. Permissions Needed for View/Download Content Operations
 - xxvii. Permissions Needed for Modify Content Operations
 - xxviii. Creating Folder Domains
 - xxix. Ad Hoc Access Control
 - xxx. Editing Access Control Permissions
 - xxxi. Troubleshooting Access Control Issues
 - xxxii. Security Labeled Objects
 - xxxiii. Defining a Notification Policy
 - xxxiv. Implementing a Notification Policy
 - xxxv. Troubleshooting Context-Based Notifications
-

- xxxvi. Defining an Indexing Policy
- xxxvii. Implementing an Indexing Policy

Knowledge Check Questions

Module 9. Managing Organization Templates

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

Knowledge Check Questions

Module 10. Implementing Promotion and Change Processes

- i. Managing Promotion Preferences
- ii. Understanding the Promote Action in a Basic Life Cycle
- iii. The Promotion Request Approval Process
- iv. The Promotion Request Review Process
- v. Managing Promotion Preference Processes
- vi. Creating a New Promotion Process Preference
- vii. Changing a Promotion Preference

Knowledge Check Questions

Module 11. Administrative Support Tools

- i. Using ModelCHECK Validation During Check In
- ii. Administrator-Saved Searches
- iii. Calendar Management
- iv. Preference Management
- v. Managing Report Templates
- vi. Authoring Reports
- vii. Query Builder
- viii. Visualization Publishing Tools
- ix. Purge Management
- x. Purge Management Queries
- xi. Security Auditing and Usage Reporting
- xii. Usage Reporting
- xiii. Security Audit Reporting

Knowledge Check Questions

Module 12. Creo Parametric Data Administration

- i. Creo Parametric Installation
 - ii. Creo Parametric Installation Folders
 - iii. Understanding the Workspace Architecture
-

- iv. Multiple Creo Parametric Configurations
- v. Editing a Creo Parametric Startup File
- 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 Browser
 - xii. Configuring the Creo Parametric Browser
 - xiii. Registering a Windchill Server
 - xiv. Admin Access to a User's Windchill Workspace
 - xv. Saved Filters in Add to Workspace
 - xvi. Windchill Preference Management
 - xvii. Operation Preferences
 - xviii. Workspace Preferences
 - xix. Workgroup Manager Client Preferences
 - xx. Other Windchill CAD Related Preferences
 - xxi. Type and Attribute Management
 - xxii. Specifying the EPM Document Subtype
 - xxiii. Mapping Creo Parametric Parameters to Windchill Attributes
 - xxiv. Parameter to Attribute Mapping
 - xxv. Versioned Versus Non-Versioned Attributes
 - xxvi. Object Initialization Rules
 - xxvii. CAD Document Naming and Numbering
 - xxviii. Naming and Numbering Design Documents
 - xxix. CAD Document Naming and Numbering Policies
 - xxx. Autonumbering Policy
 - xxxi. Role-Based Naming and Numbering Policy
 - xxxii. Custom Policy
 - xxxiii. Parameter-Driven Policy
 - xxxiv. Name-Driven Policy
 - xxxv. Client Preferences For Naming and Numbering
 - xxxvi. Renaming Design Documents
 - xxxvii. Using ModelCHECK to Authorize Check In
 - xxxviii. Configuring Printing in Creo Parametric
 - xxxix. Creo Parametric Configuration Checklist
 - xl. Creo Parametric Configuration Checklist (cont.)
 - xli. Creo Parametric Configuration Checklist (cont.)
 - xlii. Creo Parametric Configuration Checklist (cont.)

Knowledge Check Questions



Visible Edge

1-888-VIS-EDGE (847-3343)

sales@visible-edge.com

www.visible-edge.com