

Windchill PDMLink 11.x



Applied Windchill Business Administration

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Preface

Introduction

Welcome to Applied Windchill Business Administration! This comprehensive course was developed to teach new Windchill business administrators what they need to know to administer Windchill. This course helps students become effective Windchill business administrators by focusing on the most commonly applied administrative practices and reinforcing PTC recommended practices. This course is designed to augment PTC's Windchill Business Administration training and is not a substitute for PTC's course. PTC offers instructor led and web-based courses for Windchill Business Administration.

The purpose of this training course is to educate and reinforce the importance and recommended practices for Windchill business architecture, principal and business process maintenance, and maintaining a multi-instance business environment. The goals of this course are to:

1. Improve the quality of new and existing Windchill deployments.
2. Increase the efficiency and effectiveness of new Windchill business administrators.
3. Condense the learning curve for Windchill business administration.
4. Ease the administrative burden for Windchill business administrators.

Through a series of brief lectures and intensive hands-on exercises, you'll re-visit several Windchill Business Administration topics in a more application and practice focused approach. You also learn methods of capturing and deploying business configuration across multiple Windchill instances. Students should leave this course with the foundation of knowledge, tools, and documentation needed to understand, manage, and decrease the effort needed to maintain your company's Windchill deployment. Apply this knowledge to take control of your Windchill business environment and save your company time and money.

Prerequisites

Students should:

- Be designated by their company as Windchill business administrators or Windchill business analysts
- Have taken PTC's Windchill Business Administration web-based or instructor-led training
- Have a general understanding of business processes and process flow within your company.

This course is written for individuals with an end user's understanding of Windchill.

Training Agenda

Applied Windchill Business Administration Day One

Welcome and Introduction

Module 1: Introduction, Contexts and Participants

- Welcome
- Terminology
- Administrative Roles
- Planning Organizations
- Organization Management
- ✓ 1 Exercises

Module 2: Licensing, Profiles and Users

- Planning Users and Groups
- PTC Licensing
- Profiles
- Managing Users and Groups
- Organization Administrators
- ✓ 5 Exercises 9 Tasks

Module 3: Contexts and Folders

- Contexts
- Planning Product and Library Contexts
- Context Managers
- Managing Products
- Managing Libraries
- Folders
- Planning Folders
- Folder Management
- ✓ 5 Exercises 8 Tasks

Module 4: Basic Life Cycles

- Life Cycles

- Custom Life Cycle States
- Two Phase Life Cycles
- Life Cycle Transitions
- State Change Diagrams
- ✓ 2 Exercises 2 Tasks

Module 5: Types and Attributes

- Attributes: Local, Global, Calculated, Alias, Graphical, Cascading
- User-Defined Attributes
- Types
- Managing Types
- Attribute Default Value, Constraints and Conditions
- Configurable Links (?)
- CAD Document Soft Typing
- Bulk Soft Type Conversion
- Type Definition Export/Import
- Resource Bundles
- ✓ 4 Exercises 14 Tasks

Day Two

Module 6: Object Initialization Rules

- Object Initialization Rules
- OIR Hierarchy and Summation
- OIR Inheritance
- Composite OIRs
- Numbering Rules
- Revision.Iteration
- Revision Series
- Modifying Revision Series
- Loading OIRs from file
- ✓ 3 Exercises 11 Tasks

Module 7: Team Administration

- Context Teams and Roles
- Shared Teams
- Team Templates
- Team Instances
- Team Role Resolution
- Managing Context and Shared Teams
- ✓ 3 Exercises 8 Tasks

Module 8: Domain Policy

- Domain Policy
- Domain Policy Rules
- Access Permissions
- Access Control Strategies
- Additional Access Control Policies
- Access Control Summation
- Domain Policy Summation Practice
- Permissions for Common Tasks
- Permissions Troubleshooting

- Notification Policies
- Indexing Policies
- Domain Policy Import/Export
- ✓ 2 Exercises 3 Tasks

Module 9: Advanced Life Cycles and Workflows

- Introduction to Workflows
- Out of the box Workflows
- Advanced Life Cycles
- Workflow Management
- ✓ 2 Exercises 9 Tasks

Day Three

Module 10: Templates Administration

- User Templates
- Context Templates
- ✓ 1 Exercises 2 Tasks

Module 11: State Change Processes

- State Change Options
- Understanding the Promotion Request Object
- Understanding the Promotion Request
- Modifying the Promotion Process
- ✓ 0 Exercises

Module 12: Change Management

- Context Team Change Administrators
- Understanding the Change Process
- Modifying the Change Process
- Executing the Change Process
- ✓ 1 Exercise

Module 13: Administrative Tools

- Queue Management
- Auditing
- Report Manager
- Query Management
- Query Development
- ✓ 1 Exercise 2 Tasks