

Business Administration of Windchill PDMLink 10.0

Overview

Course Code TRN-3160-T

Course Length 3 Days

After completing this course, you will be well prepared to set up and manage a basic Windchill PDMLink implementation at your company.

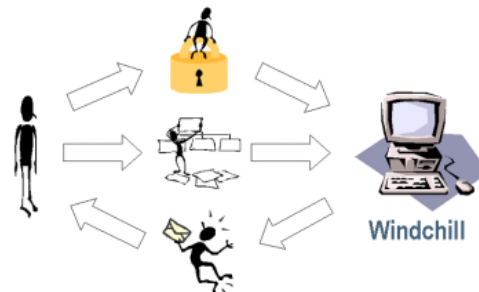
In this course, you will learn how to perform basic Windchill PDMLink administration tasks. You will learn how to plan and create user accounts and groups, and how to plan and create information management storage strategies. Other topics will include life cycles, workflows, teams, and configuring domain policies. These skills enable a business administrator to configure Windchill PDMLink to meet business needs.

At the end of each module, you will complete a skills assessment. The questions are used to help reinforce your understanding of the module topics and form the basis for review of any topics, if necessary.



Course Objectives

- Understand the processes involved in defining your business environment
- Identify the use of a Windchill Organization
- Create an organization
- Create and manage user accounts and groups
- Identify best practices for managing organizations, 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
 - Identify the pre-configured Windchill change management functions
 - Access business metrics from Change Monitor reports
 - Use ModelCHECK validation during Check In
 - Administer administrator-saved searches
 - Administer user profiles
 - Administer Windchill views
 - Administer calendar functions
 - Administer organization preferences
 - Identify the report manager functions
 - Identify visualization publishing controls
 - Identify purge manager functions
 - Audit system events
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Prerequisites

- Any one of the following courses:
 - TRN-3145 Introduction to Windchill PDMLink 10.0 for Light Users
 - TRN-3146 Introduction to Windchill PDMLink 10.0 for Heavy Users
 - TRN-3147 Introduction to Windchill PDMLink 10.0 for the Implementation Team

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 Windchill PDMLink 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 Domain Policies and Access Control

Day 3

Module	8	Managing Teams
Module	9	Managing Organization Templates
Module	10	Implementing Promotion and Change Processes
Module	11	Administrative Support Tools

Course Content

Module 1. Introduction to Windchill Business Administration

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

Knowledge Check Questions

Module 2. Managing Participants

- i. Identifying Windchill Users
 - ii. Windchill Contexts
 - iii. Users and Groups
 - iv. User Accounts
 - v. Groups
 - vi. User and Group Structure
 - vii. Best Practices for Organizations, Users, and Groups
 - viii. Administrative Navigation
 - ix. Creating a Windchill Organization
 - x. Creating Users and Groups
 - xi. Creating User Accounts
 - xii. Testing User Accounts
 - xiii. Troubleshooting User Accounts
 - xiv. Creating Groups
 - xv. Group Membership
 - xvi. Managing Existing Participants
 - xvii. Moving Users Between Organizations
 - xviii. Updating User Account Information
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- 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. 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. Windchill Object Typing Capability
 - iii. Creating Global Attributes
 - iv. Extending and Subtyping Objects
 - v. The Type and Attribute Manager – Types
 - vi. The Type and Attribute Manager – Enumerations
 - vii. Adding Attributes to Types
 - viii. New Attribute Wizard – Page 1
 - ix. New Attribute Wizard – Page 2
 - x. New Attribute Wizard – Page 3
 - xi. Managing Attribute Constraints
 - xii. Managing Attribute Visibility
 - xiii. Creating Subtypes
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- xiv. Localizing Types and Attributes
- xv. Adding Attributes to EPM Documents
- xvi. Windchill Link Typing Capability
- xvii. Identifying Link Behavior
- xviii. The Relationship Constraint Manager
- xix. Creating a Relationship Constraint
- xx. Measurement System Administration
- xxi. 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. Common Windchill Life Cycle Managed Objects
 - vii. Defining Object Life Cycle Resolution
 - viii. Creating a Life Cycle
 - ix. Specifying Life Cycle Properties
 - x. Adding Life Cycle States
 - xi. Defining States
 - xii. Identifying Life Cycle State Names
 - xiii. Identifying a Version Series
 - xiv. State-Based Versioning Example
 - xv. Understanding Transitions
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- xvi. Defining Transitions
- xvii. Understanding Life Cycle Transition Types
- xxviii. Understanding Life Cycle Transition Types
- xix. Understanding Life Cycle Transition Types
- xx. Understanding Life Cycle Transition Types
- xxi. Understanding Life Cycle Transition Types
- xxii. Transition Examples
- xxiii. Defining Role Participation
- xxiv. Defining Access Permissions using Life Cycles
- xxv. Selecting Workflow Templates
- xxvi. Life Cycle and Workflow Template Relationships
- xxvii. Life Cycle and Workflow Template Relationships
- xxviii. Specifying Promotion Criteria
- xxix. Life Cycle Best Practices
- xxx. Life Cycle Best Practices
- xxxi. Defining Workflow Templates
- xxxii. Defining Workflow Templates
- xxxiii. Defining Workflow Template Properties
- xxxiv. Understanding Assigned Activities
- xxxv. Defining Assigned Activities
- xxxvi. Understanding Connectors and Terminals
- xxxvii. Using Links
- xxxviii. Setting Link Properties
- xxxix. Simplifying Complex Processes
 - xl. Using Robots to Automate Tasks
 - xli. Creating a Workflow Template

Knowledge Check Questions

Module 7. Managing Domain Policies and Access Control

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

Knowledge Check Questions

Module 8. 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 Principal 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
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- 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

Knowledge Check Questions

Module 9. Managing Organization Templates

- i. Windchill Templates
- ii. Context Templates
- iii. Template Access
- iv. Creating Document Templates
- v. Creating CAD Document Templates
- vi. Creating a Context Template
- vii. Out-of-the-Box Product and Library Templates
- viii. Organization Templates
- ix. 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
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- 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. Change Activity/Change Notice Task Life Cycle
- xiv. Change Activity/Change Notice Task Workflow
- xv. Process and Life Cycle Relationships
- xvi. Identifying Change Management Team Templates
- xvii. Assigning Participants to Change Management Roles
- xviii. Configuring Change Management Preferences, Policies, and Rules
- xix. Configuring Change Management Preferences and Administration
- xx. Managing Promotion Preferences
- xxi. Understanding the Promote Action in a Basic Life Cycle
- xxii. The Promotion Request Approval Process
- xxiii. The Promotion Request Review Process
- xxiv. Managing Promotion Preference Processes
- xxv. Creating a New Promotion Process Preference
- xxvi. Changing a Promotion Preference
- xxvii. Accessing Business Metrics
- xxviii. Additional Change Management Reports

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
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- xv. Purge Manager
 - xvi. Purge Manager Queries
 - xvii. Security Auditing and Usage Reporting
 - xviii. Usage Reporting
 - xix. Security Audit Reporting
- Knowledge Check Questions*