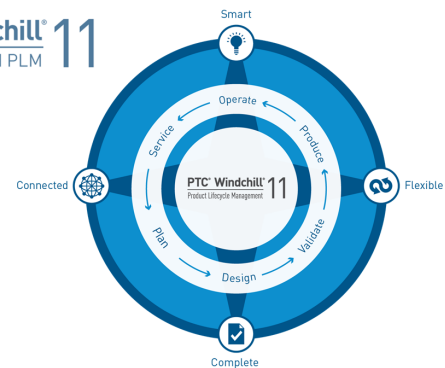


The PTC Windchill PDMLink 11.1 MCAD Data Management Process for PTC Creo Parametric

Overview

Course Code	TRN-5230-T
Course Length	8 Hours

PTC Windchill 11
Smart Connected PLM



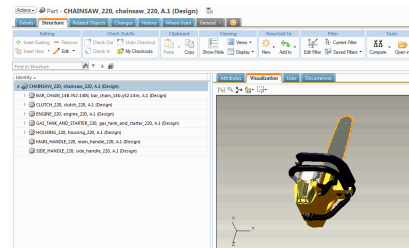
In this Process-based course, you will learn about the Windchill PDMLink Creo Parametric data management solution. You will review how to register the Windchill server with Creo and learn about the Creo Windchill access points. Additionally, you will be taught about the processes of Managing Design Data and Managing Design Development.

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 and Creo Parametric 4.0 M030.

Course Objectives

- Understand the purpose of CAD documents
- Understand the purpose of Windchill parts
- Register the Windchill server with Creo
- Understand the Manage Design Data process
- Understand the Manage Design Development process
- Locate design information
- View design information
- Create new designs and share design information
- Modify and manage existing design information
- Understand Windchill parts and their association to CAD documents
- Understand file relationships and dependencies
- Use workspace frames
- Manage family tables



Prerequisites

Audience

- This course is intended for any user who creates and/or modifies data using Creo Parametric. People in related roles will also benefit from taking this course.
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Agenda

Day 1

Module	1	Windchill MCAD Data Management Process Overview
Module	2	Manage Design Data
Module	3	Manage Design Development
Module	4	Manage CAD Data
Module	5	Working With CAD Data
Module	6	Manage Family Tables

Course Content

Module 1. Windchill MCAD Data Management Process Overview

- i. CAD Data Management Process Overview
- ii. CAD and Windchill Connectivity
- iii. Introduction to CAD Documents
- iv. Introduction to Windchill Parts
- v. Windchill Integration
- vi. Windchill Integration CAD Menus
- vii. Windchill Integration - Model Tree
- viii. Windchill Integration - Folder Browser
- ix. Windchill Integration - Search
- x. Windchill Integration - Embedded Browser
- xi. Windchill Integration - Event Management
- xii. Saved Filters in Add to Workspace
- xiii. Registering a Windchill Server
- xiv. Configuring the Creo Parametric Browser
- xv. Introduction to the Workspace
- xvi. Workspace Layout
- xvii. Changing the Active Workspace
- xviii. Working with Workspaces
- xix. Working in Large Workspaces
- xx. Deleting Workspaces
- xxi. Sharing Creo Parametric Designs
- xxii. Viewing CAD Document Information
- xxiii. Viewing CAD Document Content
- xxiv. Understanding the Workspace Architecture
- xxv. Understanding the Save, Upload, and Check In Actions
- xxvi. Understanding Web Browser Access to the Workspace
- xxvii. Understanding Workspace Objects
- xxviii. Managing Dependencies and Links
- xxix. Creo Parametric Asynchronous Mode

Knowledge Check Questions

Module 2. Manage Design Data

- i. Manage Design Data Process Overview
 - ii. Activate Workspace
 - iii. Creating a Workspace
 - iv. Setting the General Workspace Preferences
 - v. Changing the Workspace Table View
 - vi. Customizing Workspace Table Views
 - vii. Understanding Administrative Configurations
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- viii. CAD Document Naming and Numbering Policies
 - ix. Duplicate Names
 - x. Naming a New Creo Parametric Model
 - xi. Naming and Numbering Design Documents
 - xii. Creating CAD Models
 - xiii. Using CAD Templates in New Designs
 - xiv. Initiating New Designs Using New CAD Document
 - xv. Importing CAD Data to Workspace
 - xvi. Exporting CAD Data From Workspace
 - xvii. Set Parameter Values
- xviii. Setting the CAD Document Storage Location
 - xix. WTPart CAD Document Links
 - xx. WTPart CAD Document Links Example
 - xxi. Understanding Calculated and Content Links
 - xxii. Associating WTParts with CAD Documents
 - xxiii. Automatically Associating WTParts in the Workspace
 - xxiv. Manually Creating WTParts
 - xxv. Typical CAD Data Management Conflicts
 - xxvi. Regeneration Failures
 - xxvii. Incomplete Objects
- xxviii. Sample Creo Parametric Dependencies
 - xxix. Resolving Incomplete Objects from the Information Page
 - xxx. Resolving Incomplete Objects During Check In
 - xxxi. Understanding Check In
 - xxxii. Understanding the Check In Options
- xxxiii. Generating Viewables
- xxxiv. Creating Representations
- xxxv. Monitoring Publish Jobs

Knowledge Check Questions

Module 3. Manage Design Development

- i. Manage Design Development Process Overview
 - ii. Locating Design Information with Creo Parametric
 - iii. Searching for Design Information
 - iv. Browsing for Design Information
 - v. Preview Information
 - vi. Exposing PDM Information Using Creo Parametric File Open
 - vii. Exposing PDM Information in the Model Tree
 - viii. Viewing Dependency Information in Windchill
 - ix. Add to Workspace
 - x. Other Methods of Adding to Workspace
 - xi. Checking Out CAD Documents
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- xii. Dependency Processing
- xiii. Workspace Status
- xiv. Downloading Non-Latest Configurations
- xv. Removing CAD Documents from the Workspace
- xvi. Make Necessary Changes
- xvii. Understanding Download and Check Out
- xxviii. Understanding Check Out Status and Options
- xix. Modification Process - Check Out a CAD Document
- xx. Modification Process - Modify a CAD Document
- xxi. Modification Process - Check In a CAD Document
- xxii. Using Workspace Save As to Create New Designs
- xxiii. Check for Updates
- xxiv. Updating and Synchronizing Workspace Objects
- xxv. Updating CAD Documents in the Workspace
- xxvi. Synchronizing Objects in the Workspace
- xxvii. Data Organization - Manage Conflicts - Check In
- xxviii. Comparing Design Data Versions
- xxix. Initiating the Release Process
- xxx. Creating a Promotion Request
- xxxi. Completing a Change Notice Implementation Task

Knowledge Check Questions

Module 4. Manage CAD Data

- i. Using Library Parts in Assemblies
- ii. Locking CAD Documents in the Workspace
- iii. Modifying CAD Document Attributes
- iv. Canceling Modifications
- v. Renaming CAD Documents
- vi. Renaming WTParts
- vii. Moving Design Documents
- viii. Revising Design Documents
- ix. Revising from the Non-Latest Version
- x. Revise and Check Out Action

Knowledge Check Questions

Module 5. Working With CAD Data

- i. Enterprise Top-Down Design
 - ii. Enterprise Top-Down Design Process
 - iii. Understanding Gathering Parts
 - iv. Using Compare
 - v. Compare Tool Layout
 - vi. Introduction to Workspace Frames
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- vii. Accessing Workspace Frames
- viii. Workspace Frames Details
- ix. Retrieving Simplified Representations On-the-Fly
- x. Using External Simplified Representations
- xi. Using Flexible Components
- xii. Managing Secondary Content Files with Windchill
- xiii. Using Creo Parametric to Compare PDM Model Versions
- xiv. Hyperlinks within a Drawing
- xv. Understanding Control Characteristics
- xvi. Defining Control Characteristics
- xvii. Working with Offline Workspaces
- xviii. Making Workspaces Available Offline
- xix. Restoring Offline Workspaces
- xx. Locking and Unlocking Workspaces
- xxi. Understanding the Workspace Export and Import Process
- xxii. Exporting a Workspace from the Source Windchill Installation
- xxiii. Importing a Workspace into Another Windchill Installation
- xxiv. Exporting a Workspace from Another Windchill Installation
- xxv. Importing a Workspace to the Source Windchill Installation

Knowledge Check Questions

Module 6. Manage 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
