

Update to PTC Windchill PDMLink 11.1 from PTC Windchill PDMLink 10.1 for the User and Administrator

Overview

Course Code TRN-5255-T

Course Length 8 Hours

In this course, you will learn to identify the new Windchill features available in Windchill 11.1. This course is designed for users and administrators who need to update their Windchill knowledge and skills from Windchill 10.1 to work in a Windchill 11.1 environment.

You will complete PTC University Proficiency skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.

This course has been developed using Windchill 11.1 F000.

PTC® Windchill® 11

Smart Connected PLM



SMART



CONNECTED



COMPLETE



FLEXIBLE

Course Objectives

- Identify the Usability updates.
- Identify the Product Structure Management updates.
- Identify the Change Management updates.
- Identify the Document Management updates.
- Identify the CAD Data Management updates.
- Identify the Work Management updates.
- Identify the Product Family Management User enhancements.
- Explore the Augmented Reality experience from Windchill.
- Identify Type and Attribute Management user interface enhancements.
- Identify Preference Management enhancement.
- Create and manage reusable attributes.
- Create and manage local attributes.
- Add new database columns for local attributes.
- Identify alias and calculated attribute enhancements.
- Create graphical attributes.
- Identify change management flexibility.
- Create and manage change association rules.



- Identify change association type enhancement.
 - Create and manage change object templates.
 - Create native task templates.
 - Identify workflow template administration enhancements.
 - Identify workflow enhancements.
 - Identify life cycle template administration enhancement.
 - Identify new and modified system preferences.
 - Identify access control and auditing enhancements.
 - Explore the new Team Template Administration utility.
 - Identify reporting enhancements.
 - Explore the new charting feature.
 - Identify role base naming and numbering policy.
 - Monitor file vaults.
 - Review error reporting enhancements.
 - Review enhanced cache management using Windchill Configuration Assistant.
 - Identify new browser support.
 - Identify new platform support.
 - Explorer the Indexing Administration utility.
 - Identify Performance Advisor for PTC Windchill.
 - Explore windchill object uniqueness level.
 - Create and manage windchill licensing.
 - Explore the Licenses Management utility.
 - Retrieve license online and import license from a file.
 - Explore new license profiles and there hierarchy.
 - Explore user license and standard profile interaction.
 - Add users to the license group.
 - Explore license management for test and development systems.
 - Explore new product family management administration.
 - Explore licensing and installation for product family.
 - Identify new product family roles and objects.
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Prerequisites

- Experience with the Windchill 10.1, 10.2, or 11.0 business and system administration.

Audience

- This course is intended for business and system administrators. People in related roles will also benefit from taking this course.
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Agenda

Day 1

Module	1	End User Enhancements
Module	2	Managing Object Attributes
Module	3	Change Management Enhancements
Module	4	Miscellaneous Business Administration Enhancements
Module	5	Miscellaneous System Administration Enhancements
Module	6	Windchill License Management
Module	7	Product Family Management Administration

Course Content

Module 1. End User Enhancements

- i. Using Advanced Search - Criteria Section
 - ii. Using Advanced Search - Nested Queries
 - iii. Using Advanced Search - Related Object Search
 - iv. Advanced Search Report Template
 - v. Search Results Table Enhancements
 - vi. Faceted Search Results
 - vii. No Java Applet for Electronic Signature, Life Cycle, and Workflow Template
 - viii. Rich Text Editor in Change Management
 - ix. Language Configuration for Windchill User Interface
 - x. No Java Applet for Document Content Upload or Download
 - xi. Desktop Integration Enhancements
 - xii. The Product Structure Explorer Status
 - xiii. PSB Visualization Tab Usability
 - xiv. PSB Related Information
 - xv. PSB Show and Hide Actions
 - xvi. New PSB Actions
 - xvii. Superseding Parts
 - xviii. Change Management Business Rules
 - xix. Change Notice Templates
 - xx. Flexible Change Associations
 - xxi. New Problem Report - Select Associations
 - xxii. New Change Request - Select Associations
 - xxiii. New Change Notice - Select Associations
 - xxiv. Creating Variances - Select Associations
 - xxv. Superseding an Affected Object
 - xxvi. Change Management Annotation Table
 - xxvii. New Change Task - Impact Association
 - xxviii. Optional Review for Multiple Participants
 - xxix. Change Management - Change in Association Mode
 - xxx. Advanced Logic Feature for Configurable Parts in Part Structure Browser
 - xxxi. Configuring the Creo Parametric Browser
 - xxxii. Optimizing Workspace Performance
 - xxxiii. Selecting WTPart Soft Type From Workspace
 - xxxiv. Saving and Uploading Workspace CAD Data
 - xxxv. Understanding PTC Creo Design Exploration Extension (DEX)
 - xxxvi. Understanding PTC Creo Unite
 - xxxvii. Set New Name Utility
 - xxxviii. New Promotion Request After Check In
 - xxxix. Multiple Owner Links
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- xl. Revise Action Supports Calculated Links
- xli. Specifying the Windchill Part Build Upon CAD Document Check In
- xlii. Bulk Build Utility
- xliii. Saved Filters in Add to Workspace for End User
- xliv. Move Preference
- xlv. Renaming Multiple Parts
- xlvi. Promotion Request Need By Date
- xlvii. Understanding Product Family Management
- xlviii. Enable Product Family Definition for the Configurable Platform
- xlix. Understanding Product Family Matrix Editor
 - I. Using Augmented Reality Experience from Windchill
 - li. Workflow to Publish Augmented Reality Experience
 - lii. Security Labels Change History Table

Knowledge Check Questions

Module 2. Managing Object Attributes

- i. Preferences Management Enhancement
 - ii. The Type and Attribute Management Enhancements
 - iii. Types of Attributes
 - iv. Creating Reusable Attributes
 - v. Global Enumerations
 - vi. Creating Subtypes
 - vii. Localizing Types and Attributes
 - viii. Cascading Attributes
 - ix. Enumerations and Cascading Attribute Rules
 - x. Creating a New Cascading Attribute Rule
 - xi. Editing a Cascading Attribute Rule
 - xii. Editing a Cascading Attribute Rule Condition
 - xiii. Running the Attribute Set Report
 - xiv. Adding Columns to Types
 - xv. Running the AddColumns Utility
 - xvi. AddColumns Report and Addressing Warnings
 - xvii. Local and Global Attribute Comparison
 - xviii. Alias and Calculated Attribute Display Enhancements
 - xix. Graphical Attributes
 - xx. Creating a Traffic Light Graphical Attribute
 - xxi. Creating a Percent Complete Graphical Attribute
 - xxii. Creating a Progress Bar Graphical Attribute
 - xxiii. Error Conditions
 - xxiv. Measurement System Administration
 - xxv. Quantity of Measure Administration
 - xxvi. Relationship Constraints Tab
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*Knowledge Check Questions***Module 3. Change Management Enhancements**

- i. Change Management Process Flexibility
- ii. Change Association Rules
- iii. Creating New Change Association Rules
- iv. Enabling and Disabling Change Association Rules
- v. Modes of Operation
- vi. Understanding the Association Types
- vii. Understanding Impact Change Association
- viii. Change Object Templates
- ix. Creating a Change Notice Template
- x. Creating a Change Task Template
- xi. Native Task Form Templates
- xii. Creating Native Task Form Templates

*Knowledge Check Questions***Module 4. Miscellaneous Business Administration Enhancements**

- i. Enabling Set Revision While Creating a New Object
 - ii. Configuring the Windchill Home Page
 - iii. The Charting Feature
 - iv. Creating a Chart
 - v. Saving Charts
 - vi. The Save As New User Feature
 - vii. Exporting and Importing Table Views
 - viii. Performing Set State on Multiple Items
 - ix. Agreement Security Label Filtering Enhancement
 - x. Life Cycle Template Administration Enhancement
 - xi. Workflow Template Administration Enhancement
 - xii. Workflow Process Manager
 - xiii. Complete Task Transition in Workflows
 - xiv. Download Permission Requirement
 - xv. Change Association Preferences
 - xvi. Search Preferences and Properties
 - xvii. Replacement of Java Applet Upload and Download Functionality
 - xviii. The Edit Access Control Feature
 - xix. Editing Access Control with Security Labels Enabled
 - xx. Managing Profiles
 - xxi. Auditing Administration Enhancements
 - xxii. Creating Team Templates
 - xxiii. Managing Report Templates
 - xxiv. Authoring Reports
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- xxv. Query Builder
- xxvi. Role-Based Naming and Numbering Policy
- xxvii. Admin Access to a User's Windchill Workspace
- xxviii. Saved Filters in Add to Workspace

Knowledge Check Questions

Module 5. Miscellaneous System Administration Enhancements

- i. Monitor File Vaults
- ii. Automated Cleanup of Replica Vaults
- iii. Configuring Windchill File Vaults to Use Amazon S3 Storage
- iv. System Error Reporting
- v. Using the Persisted Log Events Page
- vi. The Log Event Details Page
- vii. The Log File Viewer Page
- viii. Administration Actions After Receiving Error Reports
- ix. Additional Caches Set Through the Windchill Configuration Assistant
- x. Form Based Authentication
- xi. Database Support
- xii. Java Support
- xiii. Platform Support
- xiv. Web Server and Servlet Engine Support
- xv. Setting Uniqueness Level for Windchill Objects

Knowledge Check Questions

Module 6. Windchill License Management

- i. Windchill Licensing
- ii. Managing License
- iii. License Validation
- iv. License Types
- v. License Management Utility
- vi. Viewing License Information
- vii. License Notification
- viii. Retrieving License Online
- ix. Importing License from a File
- x. Managing User Licenses
- xi. License Profiles
- xii. License Profile Hierarchy
- xiii. License and Standard Profile Interaction
- xiv. License Groups
- xv. License Usage Report
- xvi. Managing Licenses for Test and Development Systems

Knowledge Check Questions

Module 7. Product Family Management Administration

- i. Product Family Management Licensing and Installation
- ii. Product Family Management Roles and Objects

Knowledge Check Questions