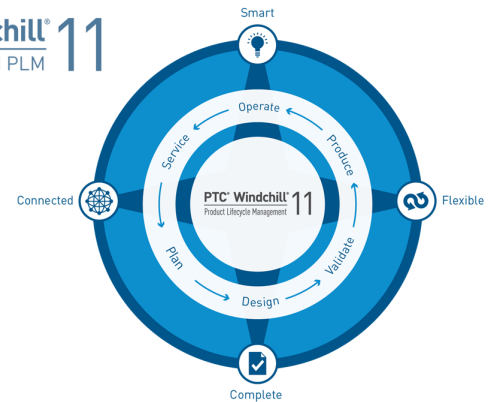


# Managing PTC Creo Parametric Data with PTC Windchill PDMLink 11.0

## Overview

Course Code	TRN-4770-T
Course Length	8 Hours

PTC® Windchill® 11  
Smart Connected PLM



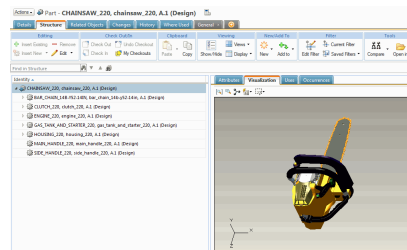
In this Process-based course, you will learn about the Windchill PDMLink Creo Parametric data management solution. After completing this course, you will be prepared to complete basic Windchill PDMLink CAD data management tasks and activities. You will also have gained a better understanding of Windchill CAD data management processes. In this course, you will learn key capabilities and features of Windchill PDMLink CAD Data Management and how to use Windchill to manage Creo Parametric design information. Specifically, you will focus on the day-to-day data management tasks required by the Creo Parametric user community, including how to use the CAD data structure to associate and build the product structure. You will also be taught how to use Windchill to perform basic PDM functions on Creo Parametric CAD Documents and their associated Windchill parts.

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 11.0 F000 / Creo Parametric 3.0 M070.

## 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.
-

## 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. Introduction to CAD Documents
- iii. Introduction to Windchill Parts
- iv. Creo Parametric and Windchill Connectivity
- v. Windchill Integration
- vi. Windchill Integration – Creo Parametric 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. Registering a Windchill Server
- xiii. Configuring the Creo Parametric Browser
- xiv. Introduction to the Workspace
- xv. Workspace Layout
- xvi. Changing the Active Workspace
- xvii. Working with Workspaces
- xviii. Working in Large Workspaces
- xix. Deleting Workspaces
- xx. Sharing Creo Parametric Designs
- xxi. Viewing CAD Document Information
- xxii. Viewing CAD Document Content
- xxiii. Understanding the Workspace Architecture
- xxiv. Understanding the Save, Upload, and Check In Actions
- xxv. Understanding Web Browser Access to the Workspace
- xxvi. Understanding Workspace Objects
- xxvii. Managing Dependencies and Links

#### *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. Setting the Document Configuration Specification Workspace Preference
  - vi. Setting the Part Configuration Specification Workspace Preferences
  - vii. Changing the Workspace Table View
  - viii. Customizing Workspace Table Views
  - ix. Naming a New Creo Parametric Model
-

- x. Naming and Numbering Design Documents
- xi. Naming and Numbering Policy Example
- 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
- xvii. Parameter to Attribute Mapping
- xviii. Set Parameter Values
- xix. Setting the CAD Document Storage Location
- xx. WTPart CAD Document Links
- xxi. WTPart CAD Document Links Example
- xxii. Understanding Calculated and Content Links
- xxiii. Associating WTParts with CAD Documents
- xxiv. Automatically Associating WTParts in the Workspace
- xxv. Manually Creating WTParts
- xxvi. Typical CAD Data Management Conflicts
- xxvii. Regeneration Failures
- xxviii. Incomplete Objects
- xxix. Sample Creo Parametric Dependencies
- xxx. Resolving Incomplete Objects From the Information Page
- xxxi. Resolving Incomplete Objects During Check In
- xxxii. Understanding Check In
- xxxiii. Understanding the Check In Options
- xxxiv. Creating New Designs in the Commonsplace
- xxxv. Generating Viewables
- xxxvi. Creating Representations
- xxxvii. 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
-

- 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
- xviii. 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. Understanding PTC Creo Unite
-

- vii. Understanding PTC Creo Design Exploration Extension (DEX)
- viii. Introduction to Workspace Frames
  - ix. Accessing Workspace Frames
  - x. Workspace Frames Details
  - xi. Retrieving Simplified Representations On-the-Fly
  - xii. Using External Simplified Representations
- xiii. Using Flexible Components
- xiv. Managing Secondary Content Files with Windchill
- xv. Using Creo Parametric to Compare PDM Model Versions
- xvi. Hyperlinks within a Drawing
- xvii. Understanding Control Characteristics
- xviii. Defining Control Characteristics

*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*

---