



# Managing Creo/CAD Data in Windchill

# **Training Course Description**

1 day course

## **Summary**

In this Process-based course, you will learn about the Windchill PDMLink CAD 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 CAD design information. Specifically, you will focus on the day-to-day data management tasks 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 CAD Documents and their associated Windchill parts.

**Software:** Windchill Creo Data Management & Visualization *or* Windchill Multi-MCAD Data Management & Visualization

## **Course Topics:**

### 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

#### **Details**

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. Registering a Windchill Server

xiii. Configuring the Creo Parametric Browser

xiv. Introduction to the Workspace

xv. Workspace Lavout

xvi. Changing the Active Workspace xvii. Working with Workspaces

xviii. Working in Large Workspaces

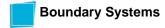
xix. Deleting Workspaces

xx. Sharing Creo Parametric Designs xxi. Viewing CAD Document Information

xxii. Viewing CAD Document Content

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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

#### 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 From Workspace

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 Commonspace

xxxv. Generating Viewables xxxvi. Creating Representations

xxxvii. Monitoring Publish Jobs

#### 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

#### 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

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### 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

#### 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



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