



# Workflow Administration of Windchill

# Training Course Description

3 day course

## **Summary**

In this course, you will learn about Windchill workflow features and how to design, configure, and test workflow processes. After completing this course, you will be able to plan and configure workflow automation features to support your company's business processes.

This course is intended for Windchill business administrators and application developers.

Software: Windchill Base, Advanced or Premium

# **Course Topics:**

# Day 1

Module 1 Using Workflow Tools Module 2 Defining Manual Tasks

### Day 2

Module 3 Controlling Process Flow

Module 4 Simplifying Complex Templates

Module 5 Automating Tasks

Module 6 Using Workflow Templates

# **Details**

## **Module 1. Using Workflow Tools**

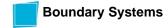
- i. Workflow Use in the Windchill Product Lines
- ii. Identifying Process Management Objects
- iii. Workflow Management Tools
- iv. Workflow Administrators
- v. Accessing Workflow Template Administration
- vi. Using the Workflow Template Administrator
- vii. Displaying Workflow Templates
- viii. Creating Workflow Templates
- ix. Validating and Checking In Workflow Templates
- x. Modifying Workflow Templates

- xi. Exporting and Importing Workflow Templates
- xii. Workflow Creation Best Practices
- xiii. Understanding Workflow Processes
- xiv. Initiating a Process from a Workflow Template
- xv. Workflow Process States
- xvi. Searching for Workflow Processes
- xvii. Browsing to Workflow Processes
- xviii. Viewing Process Information
- xix. Managing Workflow Processes with the Process

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xx. Managing Workflow Processes with the Workflow Process Administrator

xxi. Determining the Status of a Process Node

xxii. Administratively Manipulating Processes

xxiii. Manipulating Process Nodes

xxiv. Testing Workflow Templates

#### **Module 2. Defining Manual Tasks**

i. Defining Workflow Template Properties

ii. Understanding Assigned Activities

iii. Defining Assigned Activities

iv. Defining General Properties

v. Defining Activity Properties

vi. Defining Instructions

vii. Defining Participants

viii. Best Practices for Defining Participants

ix. Defining Deadlines

x. Defining Global Workflow Variables

xi. Defining Assigned Activity Variables

xii. Creating Assigned Activity and Global Variables

xiii. Granting Additional Access

xiv. Understanding Variable Scope

xv. Defining Routing

xvi. Defining Automatic Routing

xvii. Defining Transition Conditions

xviii. Defining Execution Options

xix. Defining Role Setup

xx. Defining Resource Pool

### **Module 3. Controlling Process Flow**

 Creating Complex Processes with Connectors and Links

ii. Understanding Connectors and Terminals

iii. Using Start, Ground, and End Connectors

iv. Using And Connectors

v. Using Or Connectors

vi. Using Links

vii. Setting Link Properties

viii. Using Loop Links

ix. Using Conditional Connectors

x. Using Threshold Connectors

# **Module 4. Simpliying Complex Templates**

i. Simplifying Complex Processes

ii. Using Block Processes

iii. Converting Nodes to a Block Process

iv. Block Process Properties

v. Using Proxy Processes

vi. Proxy Process Properties: General

vii. Proxy Process Properties: Deadline/Variable Mapping

#### Module 5. Automating Tasks

i. Using Robots to Automate Tasks

ii. Using Method Robots

iii. Using Method Robots to Mature Objects

iv. Using Method Robots: Set State

v. Using Method Robots: Submit

vi. Using Method Robots: Promote/Demote/Deny/Drop

vii. Using Notification Robots

viii. Notification Robot Properties: General/Recipients

ix. Notification Robot Properties: Message/Attachments

x. Notification Message

xi. Checkpoint Robot

xii. Using Method Robots: Check Out/Check In

xiii. Using Timer Robots

xiv. Using Application Robots

xv. Using Synchronization Robots

xvi. Synchronization Robot Properties

xvii. Object Event Synchronization

xviii. Class Event Synchronization

xix. Expression Synchronization

xx. Using Expression Robots

xxi. Expression Robot Properties

xxii. Using the URL Robot

xxiii. URL Robot Error Handling Properties

### Module 6. Using Workflow Templates

i. Understanding Windchill Life Cycles

ii. Understanding Windchill Life Cycle Types

iii. Using Workflows in Windchill

iv. Life Cycle Association Rules

v. Defining Object Life Cycle Resolution

vi. Specifying Life Cycle Properties

vii. Adding Life Cycle States

viii. Defining States

ix. Understanding Transitions

x. Defining Transitions

xi. Understanding Life Cycle Transition Types

xii. Understanding Life Cycle Transition Types (cont.)

xiii. Understanding Life Cycle Transition Types (cont.)

xiv. Transition Examples

xv. Defining Role Participation

xvi. Defining Access Permissions Using Life Cycles

xvii. Selecting Workflow Templates

xviii. Modular Workflow Approach

xix. Single Workflow Approach

xx. Life Cycle Best Practices

xxi. Managing Promotion Preferences

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xxii. Understanding the Promote Action in a Basic Life Cycle

xxiii. The Promotion Request Approval Process

xxiv. The Promotion Request Review Process

xxv. Managing Promotion Preference Processes

xxvi. Creating a New Promotion Process Preference

xxvii. Changing a Promotion Preference

xxviii. Creating Workflow Templates for Promotion Requests

xxix. Routing Objects in Projects and Programs

xxx. Creating a Workflow Template for Routing

xxxi. Creating a Life Cycle Template for Routing

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