

## WORKFLOW ADMINISTRATION OF WINDCHILL



### DETAILS

#### SOFTWARE

- Windchill Base, Advanced or Premium, or equivalent new license packages; and
- Windchill Creo Data Management & Visualization or Windchill Multi-MCAD Data Management & Visualization

#### DURATION

- 2 Days

#### DELIVERY METHOD

- Virtual Instructor-Led: Public or Private
- In-Person Instructor-Led: Public or Private

#### ADDITIONAL

- Learning guide provided
- Certificate of Completion provided

#### CONTACT

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#### COURSE OVERVIEW

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.

#### PREREQUISITES

None required.

#### COURSE TOPICS:

Using Workflow Tools  
Defining Manual Tasks  
Controlling Process Flow  
Simplifying Complex Templates  
Automating Tasks  
Using Workflow Templates

#### DETAILS

##### Module 1. Using Workflow Tools

- Workflow Use in the Windchill Product Lines
- Identifying Process Management Objects
- Workflow Management Tools
- Workflow Administrators
- Accessing Workflow Template Administration
- Using the Workflow Template Administrator
- Displaying Workflow Templates
- Creating Workflow Templates
- Validating and Checking In Workflow Templates
- Modifying Workflow Templates
- Exporting and Importing Workflow Templates
- Workflow Creation Best Practices
- Understanding Workflow Processes
- Initiating a Process from a Workflow Template
- Workflow Process States
- Searching for Workflow Processes
- Browsing to Workflow Processes
- Viewing Process Information
- Managing Workflow Processes with the Process Manager
- Managing Workflow Processes with the Workflow Process Administrator
- Determining the Status of a Process Node
- Administratively Manipulating Processes
- Manipulating Process Nodes
- Testing Workflow Templates

##### Module 2. Defining Manual Tasks

- Defining Workflow Template Properties
- Understanding Assigned Activities
- Defining Assigned Activities
- Defining General Properties
- Defining Activity Properties
- Defining Instructions
- Defining Participants
- Best Practices for Defining Participants
- Defining Deadlines
- Defining Global Workflow Variables
- Defining Assigned Activity Variables
- Creating Assigned Activity and Global Variables
- Granting Additional Access
- Understanding Variable Scope
- 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**

- i. 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. Simplifying 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
  
- 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