



ACHIEVING CONFIGURATION MANAGEMENT WITH PTC'S WINDCHILL OUT-OF-THE-BOX

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AGENDA

- Introduction
 - Who am I?
 - Who are you?

- What is configuration management?
 - Why use PTC Windchill for it?

- What are the necessary ingredients for configuration management?

- Top implementation mistakes

WHO AM I?

- Kilmer.gene@comcast.net
- Fifteen year veteran of CAD and product data management
- Contractor and consultant
- I've been around the block with managers, designers, engineers, and manufacturers

WHO ARE YOU?

- Employees of companies looking to implement a product data management system
- Employees of companies who have unsatisfactory PTC Windchill implementations

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Decorative geometric shapes in green, blue, yellow, and pink are scattered around the slide, primarily on the left side.

WHAT IS CONFIGURATION MANAGEMENT?

- Configuration management is maintaining a record of the product definition documents of a serialized instance of a product design
 - A serialized instance of the drawing of a widget is a widget itself, engraved with a unique serial number

WHY PTC WINDCHILL?

- It is able to form and maintain traceable links between serialized instances of designs and the product definition documents of those designs called configurations
 - Product definition documents are frequently models and drawings, but often include other engineering documents
 - PTC Windchill is capable of configuration management starting with release nine


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A yellow arrow pointing towards the list of configuration management ingredients.

Product definition documents
Product data management
Change control
Product structures
View versions
Configurations
Serial numbers

CONFIGURATION MANAGEMENT INGREDIENTS

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PRODUCT DEFINITION DOCUMENTS

A large, multi-colored graphic element in the bottom left corner, consisting of several overlapping triangles in shades of blue, yellow, and pink, pointing outwards.

- Requirements documents
- Design documents
- Post-manufacture documents

PRODUCT DATA MANAGEMENT

- Basic document control
- Access control

A decorative graphic on the left side of the slide, consisting of several overlapping, colorful triangles (green, blue, yellow, red) pointing towards the center. The background is a light gray gradient.

CHANGE CONTROL

- Problem reports
- Change requests
- Change notices
- Audits

VIEW VERSIONS

- Design
- Manufacturing
- Documents

Decorative geometric shapes in the background: a green triangle pointing down from the top left, a blue triangle pointing up from the bottom left, a yellow triangle pointing up from the bottom left, and a pink triangle pointing up from the bottom left.

PRODUCT STRUCTURES

- WTParts
- Associated documents
 - Referenced documents
 - Describing documents

CONFIGURATIONS

- Created for all traced components
- Created from most junior view version

Decorative geometric shapes in green, blue, yellow, and pink are scattered on the left side of the slide, pointing towards the center.

SERIAL NUMBERS

- Unique
- Spun off configurations
- Allocated from the bottom up
- Carrying post-manufacture documents

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TOP IMPLEMENTATION MISTAKES

- Subtyping EPMDocuments
- Hidden states
- Rejecting problem reports
- Permissions based upon roles
- Rejecting projects
- Using Set State

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TOP IMPLEMENTATION MISTAKES

- Modifying the out-of-the-box change process
- Rejecting describing documents
- Rejecting view versions
- Rejecting configurations
- Not gaining acceptance
- Using Revise

The image features several colorful geometric shapes, primarily triangles and lines, scattered across the background. A large, multi-colored triangular shape is prominent on the right side, composed of various shades of blue, green, yellow, orange, pink, and purple. Several thin, colored lines (blue, pink, green, orange) radiate from the center of the text area. The text 'LIVE WORX 16' is the central focus, with 'LIVE' in a thin, outlined font and 'WORX 16' in a bold, solid black font. A small 'TM' trademark symbol is positioned to the upper right of the '6'.

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