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| **Implementation and Configuration Guide - <PracticeName> BP** |  |
|  | bg_image |
| <Customer Name>  <Customer Details / Info> |
| <Prepared By>  <email> |
| RVP_logo_black | PTC_LogoCMYKBlue_noTag |

Document Properties

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Overview

This deliverable describes application configuration of the system to enable capabilities that address functional business requirements and desired features. The application software delivered as part of <client name> solution provides configurable features and functions for representing <client name’s> business. This document describes the configurable design of system applications defined during Business Configuration Design.

Implementation Considerations

This section discusses factors pertaining to the deployment and implementation for this practice.

# Topic 1

## Sub-Heading

# Topic 2

## Sub-Heading

# Topic 2

## Sub-Heading

Windchill Business Configuration Settings

Note:

For each of the following sections, the data inside the tables is presented as an example to aid the consultant with understanding how to use this template. The information presented in each table should be replaced with actual customer data.

# Site Level Settings

Note:

In most situations there should be few site level settings for a single organization configuration. It is also the case that a multiple organization configuration will not have many site level settings either, because multiple organizations usually do not result in common settings at the site level.

Site level settings are configurations that affect the entire system and serve as the defaults for all containers (Organization, Products and Libraries) in the system.

## Site Level Soft Types and Attributes

The following soft type(s) will be configured to allow different characteristics (attributes), unique lifecycles or workflows, and access control policy from the parent part or document:

Table 1

|  |  |  |  |
| --- | --- | --- | --- |
| **Display Name** | **Soft Type Parent** | **Attributes** | **Description** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Site Level Lifecycle and Workflows

The following lifecycles and workflows will be created to meet the needs for <client name’s> business objects (for example, parts, CAD documents, and documents):

Table 2

|  |  |  |
| --- | --- | --- |
| **Lifecycle Name** | **Workflow Name** | **Description** |
|  |  |  |
|  |  |  |

## Site Level Team Templates

The following team templates will be created to align roles with Windchill workflows:

Table 3

|  |  |  |  |
| --- | --- | --- | --- |
| **Team Template Name** | **Team Roles** | **Participants** | **Description** |
|  |  |  |  |

## Site Level Shared Teams

The Shared Teams will be created in order to use a common set of users and roles across multiple Product or Library containers:

Table 4

|  |  |  |  |
| --- | --- | --- | --- |
| **Shared Team Name** |  | **Participants** | **Description** |
|  |  |  |  |

## Site Level User Groups or Organizations

Principal organizations are used to collect users into groups for establishing access control policies and display profiles that apply to all of the users in that group or organization. The following are the organizations and groups that are needed for this solution:

Table 5

|  |  |
| --- | --- |
| **Group/Organization Name** | **Description** |
|  |  |

## Site Profiles

Profiles are used to control the display of various actions (in dropdowns and icons) and/or attributes shown for a given organization/group of users. Listed below are the profile changes from the default settings for users:

Table 6

|  |  |  |  |
| --- | --- | --- | --- |
| **Profile Name** | **Groups/Orgs Affected** | **Actions/Attributes Affected** | **Description** |
|  |  |  |  |

## Site Level Preferences

Preferences control various aspects of behavior, features, and user interface for a given container. The following are the preferences set for this solution:

Table 7

|  |  |  |
| --- | --- | --- |
| **Preference Name** | **Preference** | **Description** |
|  |  |  |

## Site Level Object Initialization Rules

The objects initialization rules (OIRs) listed below establish the default values associated to the specified object:

Table 8

|  |  |  |
| --- | --- | --- |
| **Rule Name** | **Object** | **Description** |
|  |  |  |
|  |  |  |

# Organization Level Settings

Note

It is generally preferable to maintain site level settings that reflect the default Windchill installation settings. The organization level is then used to establish settings intended across the system. Using organizations in this simple manner is usually is beneficial when upgrading the system application to a new release.

## Organization Level Soft Types and Attributes

The following soft type(s) will be configured to allow different characteristics (attributes), unique lifecycles or workflows, and access control policy from the parent part or document:

Table 9

|  |  |  |  |
| --- | --- | --- | --- |
| **Display Name** | **Soft Type Parent** | **Attributes** | **Description** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Organization Level Lifecycle and Workflows

The following lifecycles and workflows will be created to meet the needs for <client name’s> business objects (for example, parts, CAD documents, and documents):

Table 10

|  |  |  |
| --- | --- | --- |
| **Lifecycle Name** | **Workflow Name** | **Description** |
|  |  |  |

## Organization Level Team Templates

The following team templates will be created to align roles with Windchill workflows:

Table 11

|  |  |  |  |
| --- | --- | --- | --- |
| **Team Template Name** | **Team Roles** | **Participants** | **Description** |
|  |  |  |  |

## Organization Level Shared Teams

The Shared Teams will be created in order to use a common set of users and roles across multiple Product or Library containers:

Table 12

|  |  |  |  |
| --- | --- | --- | --- |
| **Shared Team Name** | **Team Roles** | **Participants** | **Description** |
|  |  |  |  |

## Organization Level User Groups

Principal organizations are used to collect users into groups for establishing access control policies and display profiles that apply to all of the users in that group or organization. The following are the organizations and groups that are needed for this solution:

Table 13

|  |  |  |
| --- | --- | --- |
| **Group Name** | **Users** | **Description** |
|  |  |  |

## Organization Profiles

Profiles are used to control the display of various actions (in dropdowns and icons) and/or attributes shown for a given organization/group of users. Listed below are the profile changes from the default settings for users:

Table 14

|  |  |  |  |
| --- | --- | --- | --- |
| **Profile Name** | **Groups/Orgs Affected** | **Actions/Attributes Affected** | **Description** |
|  |  |  |  |

## Organization Level Preferences

Preferences control various aspects of behavior, features, and user interface for a given container. The following are the preferences set for this solution:

Table 15

|  |  |  |
| --- | --- | --- |
| **Preference Name** | **Preference** | **Description** |
|  |  |  |

## Organization Level Object Initialization Rules

The objects initialization rules (OIRs) listed below establish the default values associated to the specified object:

Table 16

|  |  |  |
| --- | --- | --- |
| **Rule Name** | **Object** | **Description** |
|  |  |  |

Windchill PDMLink Business Configuration Settings

# Product and Library Level Settings

Business requirements for <client name> products and libraries are represented in this section. Products and libraries can be configured in the system directly or they may be created through the use of templates.

The following sections describe the business configurations created for each product and library container or product and library template.

## <Named> Product Template

Note

This section should be copied for each product or library template and each product or library to be configured.

This product template is used to create <Named> products.

### Product Roles/Groups

Product roles are used to populate team roles for a given team instance of a team template. These roles also act as groups that can be assigned specific access control rules. The following are the product roles for the <Named> template:

Table 17

|  |  |  |
| --- | --- | --- |
| **Role/Group** | **Description** | **Shared Team Role?** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### Access Control Rules

The access control rules for the roles defined in Section 3.1.1 are as follows:

Table 18

|  |  |
| --- | --- |
| **Role/Group** | **Access Control Logic** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

Note

Access control policy is described in the above table. The detailed access control rules (ACLs) can be captured using the Business Capture Worksheet job aid. The Business Capture Worksheet job aid allows for the generation of ACL logic in xml form that can be imported into the Policy Administrator.

### Default Folder Structure

The following is the default folder structure of this product/library template so that information can be segregated for ease of navigation and organization:

Table 19

|  |  |  |
| --- | --- | --- |
| **Level 1** | **Level 2** | **Description** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### Local Object Initialization Rules

The following object initialization rules will be created to set lifecycles and folder locations for objects that differ from the default settings at the organization or site level:

Table 20

|  |  |  |
| --- | --- | --- |
| **Rule Name** | **Object** | **Description** |
|  |  |  |
|  |  |  |

# Project Level Settings

Business requirements for <client name> projects are represented in this section. Projects can be configured in the system directly or they may be created through the use of templates.

The following sections describe the business configurations created for each Project template.

## <Named> Project Template

Note

This section should be copied for each project template and each project to be configured.

This project template is used to create <Named> projects.

### Project Roles/Groups

Project roles are used to populate team roles for a given team instance of a team template. These roles also act as groups that can be assigned specific access control rules. The following are the project roles for the <Named> template:

Table 17

|  |  |  |
| --- | --- | --- |
| **Role/Group** | **Description** | **Shared Team Role?** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### Project Roles/Groups

Project roles are used to populate team roles for a given team instance of a team template. These roles also act as groups that can be assigned specific access control rules. The following are the project roles for the <Named> template:

Table 17

|  |  |  |
| --- | --- | --- |
| **Role/Group** | **Description** | **Shared Team Role?** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### Template Users

Project template users can be utilized to populate Team Roles with placeholder users with the format of *placeholder*\_?. The placeholders can then be assigned Deliverables and Activity assignments within the template, and then replaced once the template is used within the project. The following are the project template users for the <Named> template:

Table 17

|  |  |
| --- | --- |
| **Role/Group** | **Description** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

Note

A Project Role may have multiple users. The “\*” above can be replaced with a number when multiple placeholders are required.

Note

Project Templates are generally created by a named user or principal within Windchill. The process of saving the template into the Organization or Site location will save this principal user in the project template as well. Once the template is saved, the template should be modified to remove this user

### Access Control Rules

Access control rules are driven by the Organizational or Site level access controls.

### Default Folder Structure

The following is the default folder structure of this project template so that information can be segregated for ease of navigation and organization:

Table 19

|  |  |  |
| --- | --- | --- |
| **Level 1** | **Level 2** | **Description** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### Default Folder Access Controls

The following is the default folder access controls of this project template so that access to information can be segregated for ease of navigation and organization:

Table 19

|  |  |  |
| --- | --- | --- |
| **Folder** | **User** | **Access Control** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### Local Object Initialization Rules

Object Initialization rules for projects are defined by the rules at either Organizational or Site level.

### Default Reference Links

Links or shares defined in a project allow users to easily access regulations and / or standards stored within Products or Libraries. The following is the default reference links to product or library content for this project:

Table 19

|  |  |  |
| --- | --- | --- |
| **Document Name** | **Context Name / Type** | **Link Name** |
|  |  |  |
|  |  |  |
|  |  |  |

### Default Plan Activities and Timeline

The following is the default activities developed in the Project Plan for this project:

Table 19

|  |  |  |  |
| --- | --- | --- | --- |
| **Activity Name** | **Type** | **Description** | **Included in Timeline** |
|  |  |  | Yes/No |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

### Sequencing and Activity Duration

Project Plan activities can be linked to one another using Predecessor rules, so that before an activity is started the predecessor is complete. Also The following is the default activities developed in the Project Plan for this project:

Table 19

|  |  |  |
| --- | --- | --- |
| **Activity Name** | **Predecessor** | **Activity Duration in Days** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### Sequencing, Activity Duration and Resources

Project Plan activities can be linked to one another using Predecessor rules, so that before an activity is started the predecessor is complete. Also, the following is the default activities developed in the Project Plan for this project:

Table 19

|  |  |  |  |
| --- | --- | --- | --- |
| **Activity Name** | **Predecessor** | **Activity Duration in Days** | **Resources / (Owner)** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Note

Resources and Owners can be allocated from the placeholder users during project template development. During the utilization of the project template, these placeholders can be replaced. During the replacement, the ownership and resource allocations are also updated in the Activities.

### Templates

A Project Template can contain additional templates in addition to templates provided via the Organization or Site. The following are the templates developed in the Project Plan for this project:

Table 19

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Type** | **Description** | **Content / Source Document** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

### Deliverables and Contents

Deliverables can be defined and associated to the Activities defined within the project plan. Deliverables can be associated with placeholder users defined in the project team. Placeholder may or may not have related content. The following are the deliverables developed in the Project Plan for this project:

Table 19

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Name** | **Reference** | **Description** | **Content** | **Owner** | **Activity** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

# Client level Settings

The following sections describe the configurations settings to be done on the client machine.

External References

|  |  |
| --- | --- |
| **Reference** | **Description** |
| <Type file name of the document> | <Type description of document> |