## WindChill Driving Instructions

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I started a series of emails to James Osborn because I kept finding the instructions to Windchill were more like operating manuals for cars. What I really wanted were driving instructions. So this is what I have accumulated so far.

Yeah the system does offer some flexibility in how things are handled in CAD. For non-CAD documents, it is much more like Model Manager - there is only two places your data can be, in session (possibly modified) or saved to the DB. Once saved to the DB, it is there for everyone to see the changes you have made. That is how office docs are treated in Windchill.

Windchill CAD uses Workspaces which results in four places your data can be, in session (possibly modified), Saved to the workspace (stored on your local disk), Uploaded (in the private side DB, NOT exposed for all to see), or finally Checked in (in the DB common space for all to see). How you use this setup is dependent on what your goals are for any given change you are making. Here are some suggestions:

1. If your goal is to collaborate with others who need to see your changes as early as possible, then check in often. There is an option to "keep checked out" which will put the data in common space, but continue your checkout so you can make further changes, in other words keep it reserved.

2. Maybe you wish to expose such changes to others on a day or longer cycle. Use Upload to save the data to the DB. This is safer because it protects you from your computer crashing or your local workspace becoming corrupted. When you view your workspace, you are actually seeing a blend of locally stored info and the private side DB contents. The status icons tell you which is which. When you decide your modifications have gelled sufficiently, then Check in to expose it to everyone else.

3. You are making a lot of changes and you are working remotely or on a slow network. In this case, you might just use Save all day long which only stores your modifications to the workspace local cache on your hard drive. This is not the safest, but it is the highest performance way to record your changes as you go along. At the end of the day either Upload or Check in according to your needs which will move the changes to the DB and protect you from local computer or SW crashes. You can get this started before you walk out the door so it doesn't bog you down.

4. Finally maybe you are just playing around and have no intention of saving at all. You can add data to a workspace, load it into your SW session, and start modifying it. It should prompt you that it is read only (assuming you never checked it out) and offer the choice to check out or simply Continue in which case you can modify anyway. If you change your mind and attempt one of the other actions, as long as no one else has it checked out, you should be able to check out and save in one operation.

## Question to James asking it I should clear out my workspace every-so -often.

You would think that being a fairly mature product, Windchill workspaces would be robust enough to last forever, kind of like a Unix operating system which can run for months without rebooting. But the sad fact is they are not perfect and PTC themselves recommend to clean them out often. A better way to do this, as opposed to removing things from them is to delete them altogether. This is faster in as much as you don't need to carry out multiple steps. Deleting a workspace will require that all objects are either checked in, undo-checkout, or discarded (for new objects). Undo checkout will discard any changes that are Saved in the local workspace, or Uploaded to the private side workspace; in other words, roll it back to the current state in the common space. If you have created new objects that you have saved to your workspace, but never uploaded or checked in, then you have to either check it all the way in or discard it altogether before you can remove the workspace.

I would say that it isn't necessary to clear out or delete workspaces on a weekly basis. But if you find yourself with more than a thousand or two objects in a workspace, you are probably using the same one for multiple assemblies or projects which rightly ought to have their own workspace. You can have as many as you like and they perform faster and more reliably the fewer the items that are in them. And if you are done working on a project or large assembly for some period of time, take the opportunity to just purge your workspace. If and when you get back to it, make a new one and check out what you need. Some users (I won't name names) have two to five thousand items in their workspaces and don't delete and recreate them for years at a time. They have dozens of workspaces with all kinds of stuff they are not working on for years at a time. Why? Laziness! It is easier to keep work that you are working on periodically over years compartmentalized in Workspaces. But that is what the folder structure is for in the common space too. Use some kind of naming convention that helps you recognize the top level assembly in any given folder. Then it is easy to create a new workspace with everything checked out by using the top level assembly in that folder. You can also just start with any component in a folder and use the thumbnail browser to navigate the Used By structure up the tree to find the top level.

It never hurts to check all your stuff in, purge your workspace, and create a new one. But it does take extra time, so use your best judgment on frequency.

— James