

Altium Workspace Admin Training

OEM: Altium • Code: ALTIUM_WORKSPACE_ADMIN_TRAINING

COURSE DESCRIPTION

This is a purpose-built training program for IT administrators, engineering managers, and technical leads responsible for deploying and maintaining an Altium Workspace. In a single intensive day, you'll move from workspace creation to full operational readiness — guided by expert instructors through every core admin function. Configure a production-ready Altium Workspace with the right folder structures, naming schemes, and lifecycle definitions from the start. Master user and group management with role-based access controls tailored to your organization's structure. Build governance into your workspace through lifecycle management, revision naming, and data cleanup processes. Set up project review workflows and checklists that enforce design quality without slowing your team down.

AUDIENCE PROFILE

- IT administrators and platform owners responsible for Altium Workspace setup
- Engineering managers and team leads overseeing PCB design infrastructure
- CAD/EDA administrators migrating from legacy PDM systems to the Altium Platform
- Technical leads deploying the Altium Platform within a new or growing organization

PREREQUISITES

- A stable internet connection
- An invitation to the Altium Training Workspace
- An active Altium account (see optional Module A for account creation)
- This training requires an Altium Designer Agile, Professional, or Enterprise license with Altium Platform access. A license can be provided for the duration of the training.

COURSE OBJECTIVES

By the end of this course, participants will be able to:

- This section doesn't contain any content.

COURSE OUTLINE

Module 1: Altium Training Workspace Access

- Locating and Accepting Workspace Invitations: Ensure all participants have access before training begins.
- Verifying Account Credentials: Confirm login, account status, and platform connectivity.
- Navigating the Training Workspace: Familiarize yourself with the Altium Platform environment ahead of the core modules.

Module 2: Introduction: Altium Workspace Admin Management

- Admin Portal Overview: Understand the structure and scope of the Altium Platform admin interface.
- Administrator Roles and Responsibilities: Define what it means to manage a workspace at the organizational level.
- Key Administrative Areas: Users, libraries, lifecycles, naming schemes, and platform hierarchy.

Module 3: Workspace Creation and Activation

- License Prerequisites and Workspace Creation: Understand what's needed before activating a workspace.
- Step-by-Step Activation Process: Walk through the full workspace setup from scratch.
- Initial Configuration and Verification: Confirm your workspace is live and ready for team use.

Module 4: Setting Up Folder Structures

- Folder Hierarchy in Altium Platform: Understand how to organize projects, libraries, and design assets.
- Naming Conventions and Best Practices: Apply consistent naming strategies that scale with your team.
- Organizing for Discoverability and Collaboration: Structure your workspace so team members can find and access what they need.

Module 5: Setting Up Users, Groups & Workspace Members

- User and Group Management: Add individual users, create groups, and assign workspace membership.
- Role-Based Access Control: Configure permissions so every team member has the right level of visibility and editing rights.
- Permission Structure Best Practices: Build an access framework that's secure, scalable, and easy to maintain.

Module 6: Library Admin Settings

- Parts Provider Configuration: Set up supplier sources, currencies, and Octopart-powered component search.
- Component Settings: Define default paths for symbols, footprints, simulation models, and harness components.
- Dictionaries and Part Request Settings: Create custom parameter dictionaries and enable librarian-to-engineer part request workflows.

Module 7: Defining the Item Naming Scheme

- Item Naming Scheme Fundamentals: Understand how naming schemes bring consistency to design asset identification.
- Configuring Templates and Variable Tokens: Set up naming patterns for PCBs, schematics, BOMs, and more.

- Enforcing Naming Standards Across the Organization: Apply schemes that keep your workspace structured as it grows.

Module 8: Defining the Revision Naming Scheme

- Revisions and Design Traceability: Understand how revision naming tracks design iterations from concept to release.
- Alphanumeric and Numeric Naming Patterns: Configure revision schemes that align with your organization's standards.
- Linking Revisions to Lifecycle States: Integrate revision naming with lifecycle management for full audit readiness.

Module 9: Defining Lifecycles

- Lifecycle Management Fundamentals: Learn how lifecycle definitions govern design data progression.
- Creating Lifecycle States and Transition Rules: Define stages such as Design, Review, Released, and Obsolete — with controlled transitions.
- Assigning Lifecycles to Item Types: Apply the right lifecycle definitions to the right design assets across your workspace.

Module 10: Data Cleanup

- Understanding Soft Deletion: Learn how deleted files move to the Trash folder and how administrators manage them.
- Administrator vs. User Trash Permissions: Understand the difference between what administrators and regular users can see and restore.
- Hands-On Restoration Exercise: Practice copying, deleting, and restoring components using the Workspace Browser Interface.

Module 11: Project Processes and Checklists

- Project Process Overview: Understand how Altium Platform supports structured review and approval workflows.
- Configuring Review Workflows and Checklists: Build processes that enforce quality standards and assign accountability.
- Monitoring Process Status and Audit Trails: Track workflow progress and maintain records of design reviews.

Module 12: Altium Account Creation (Optional)

- Account Registration and Verification: Walk through creating a new Altium account from scratch.
- License Association: Connect your account to the appropriate Altium license.
- Preparing for Platform Access: Ensure your account is fully configured and ready for training.