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PTC Creo® Tips and Tricks

PTC Creo 2.0 introduced more than 100 enhancements that make it more intuitive and easy to use, and have been shown to double end-user design productivity. The new PTC Creo ribbon user interface simplifies common tasks and streamlines workflows by making it faster and easier to find functions and by reducing the number of clicks required to accomplish tasks. New Freestyle design features make it easy to create freeform shapes and surfaces. Users can now easily transfer 2D sketches to the 3D environment. Many core design enhancements make it faster to create 3D models. And many other new capabilities further enhance the design process.

As a result of these changes, you're likely to find much that's unfamiliar in the new version of the product, whether you're a rookie or a long-time user with vast experience using PTC Pro/ENGINEER and PTC Creo 1.0 products. Moreover, PTC Creo solutions offer many ways to perform any given task. While some of these methods are obvious, others may not be as apparent.

The following are tips and tricks that most users are unaware of. By having an arsenal of several ways to perform common tasks, you'll be able to select the method that works best for you.
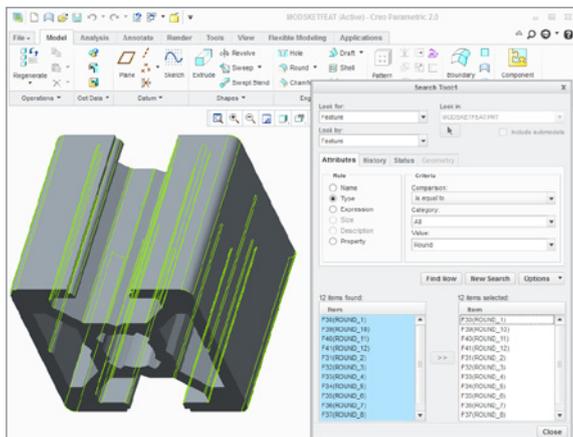

Figure 1: The Search Tool dialog box.

Tip 1 – Taking advantage of the search capability

Users often wish to find and manipulate all instances of a particular feature or part in their design. For example, to perform finite element analysis (FEA) to determine whether a part will hold up adequately under its intended use or is over- or under-engineered, you may want to remove all rounded edges. Alternatively, you may wish to remove all instances of a particular item from your design, whether that's all the screws in a large assembly or perhaps all holes in a part. Visually finding all instances of a part or feature can be difficult in a large assembly, and it can be easy to miss some instances.

The "Search" capability makes it simple to find each and every instance of any object.

To use the Search capability, press Ctrl F. The Search Tool dialog box will pop up. Make your selections from this dialog box. For example, if you want the program to find "Rounds" you can specify that the system find any Feature of the Type Round, as shown in Figure 1.

PTC Creo will display all instances of a Round in the "Items Found" section of the dialog box. To perform an action on these items, Press Ctrl A to move the items to the Items Selected box. You can now eliminate all rounds to simplify your model for your FEA by suppressing the Round feature.

Using the "Search" capability, you can rest assured that you've found all instances, without having to spend the time to visually inspect your entire model.

Tip 2 – Creating custom filters with the MyFilter option

PTC Creo provides a number of default filters that you can employ to select specific geometry when creating your models. To take advantage of these filters, most users go to the scroll down bar on the lower right hand corner of the screen, make a selection, such as Geometry, and then cycle through all the available default filters (e.g., Annotation, Quilt, Datum, Geometry), repeatedly tapping on the mouse button to pick the right ones.

However, sometimes you may want to use only a limited number of filters. If, for example, you are engaged in surface modeling, you may wish to limit your selections to an edge or a vertex, but not a surface. Having to cycle through a dozen or more defaults each time you wish to make a selection is tedious and time consuming.

PTC Creo 2.0's MyFilter option allows you to customize the selection filter so you can select only specified items, such as edges and vertices but not surfaces.

To set your custom MyFilter option, go to the File tab and select Options. In the dialog box that pops up, add any of the filters in the menu on the left to the MyFilter box on the right, as shown in Figure 2.
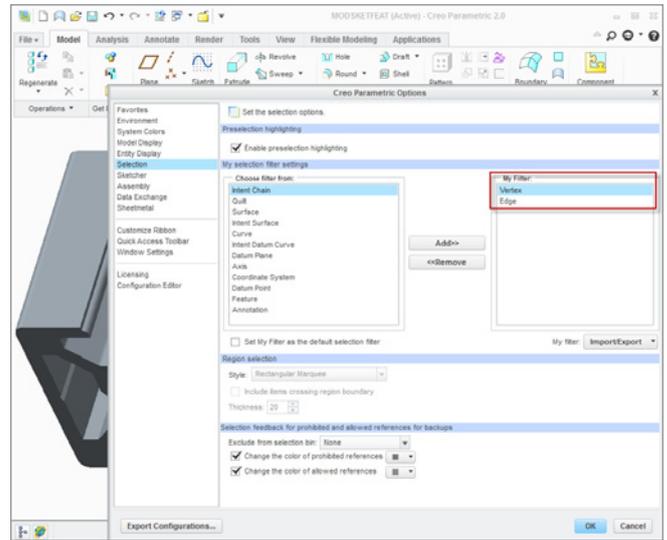
Figure 2: You can use the Options dialog box to create a custom filter.

Now when you wish to use any of your MyFilter options, go to the scroll bar on the lower right hand corner of your screen. Now that you've selected MyFilter items, the MyFilter option will appear and is available for selection, as shown in Figure 3.

Figure 3: Once defined, custom filters appear in the scroll down bar on the lower right hand corner of the screen.

By using the MyFilter option to present only the filtering option you're interested in, you can save time and improve your productivity.

Tip 3 – Defining Configuration Favorites

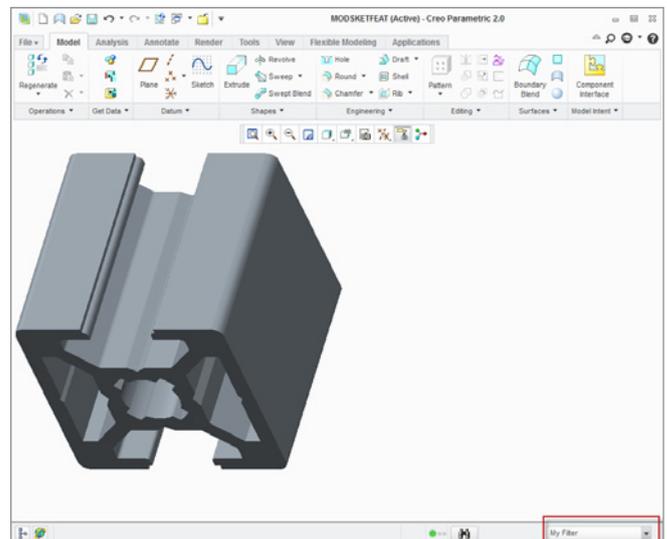When beginners first start using PTC Creo, they typically use the configuration settings that their system administrator has standardized on. However, as you become more advanced, you may want to configure your options to address your specific requirements.

One way to make configuration changes in PTC Creo is use the Configuration Editor to change the values for various options in the Config.pro file. However, having to go the Configuration Editor and look through all the choices to find the option you want to change can be time consuming and tedious.

For options you wish to change frequently, PTC Creo gives you another choice. You can set up a list of easily accessible Configuration Favorites.

To create your list of Favorites, go to the File menu, select Option, and then select Configuration. In the Configuration Editor that pops up, select the desired option and right click on that option to add it to your list of "Favorites," as shown in Figure 4.

Figure 4: Use this screen to define your list of configuration favorites.

When you want to use a Favorite, simply go to the File menu, select Option, and you'll see your list of Favorites. Simply check or uncheck the item you wish to enable or disable. For example, say you frequently use the feature, "sketcher_start_in_2d." When you enter the Sketcher, PTC Creo will orient your part with the sketch plane facing you. But there may also be times when you want to sketch in 3D. With the Favorites option, you can simply click on the Options menu, select Favorites, and change the configuration option using the check box, as shown in Figure 5.

Figure 5: Instantly change a configuration setting by using the Favorites menu.

Using Favorites can dramatically improve your productivity. People typically use a small set of capabilities to do their job and don't use the rest. Favorites let you more easily access only those configurations you need to do your job.

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Conclusion

Some of these tips are not easily found in the basic handbook, so they are not widely known. They are representative of the types of hidden tips and tricks that interacting with instructors during PTC University training sessions will bring to light.

PTC University's training and tools help individuals and organizations use PTC software more effectively. Whether you're looking for specific training courses, ways to improve the proficiency of experienced users, or a personalized corporate learning program that meets your training schedule and budget require-ments, PTC University can help you optimize your business through traditional classroom training, online courses, as well as leadership training and consulting.

PTC University enables you to make the most of your software investment through:

- **PTC Product Knowledge – First Hand.**
  PTC University has direct access to the PTC prod-uct development and consulting organizations to ensure that your courses include the most up-to-date product information plus best practices derived from thousands of customer deployments.

- **Global Expert Network.**
  All PTC University training classes are delivered by experienced instructors or certified training partners. Our global network ensures that PTC University training is delivered with consistent quality no matter where you are located.

- **Flexible Delivery Options.**
  PTC University offers any instructor-led class in the delivery format of your choice – on-site, virtual, or in a traditional classroom. On top, all PTC Creo classes are available as eLearning libraries, too.

To learn more about how our training can help your organization, please contact us today. Our Training Advisors will be happy to help you select the right training option for you. Please also take a look at the PTC University website.

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