

Introduction to PTC Windchill Customer Experience Management 11.0

Overview

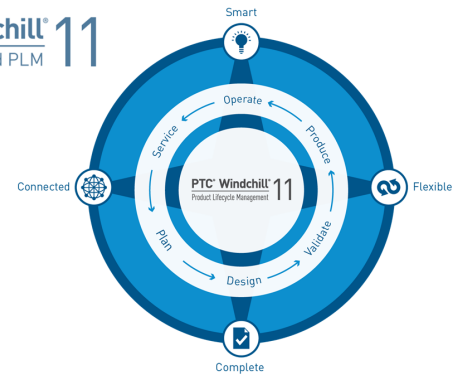
Course Code	TRN-4763-T
Course Length	16 Hours

PTC® Windchill® 11
 Smart Connected PLM

In this process-based course, you will learn about the Windchill Customer Experience Management solution for the uniform capture, codification, and processing of all customer feedback, including complaints. The course begins with introductory materials about Windchill and Windchill Customer Experience Management and then focuses on the Windchill Customer Experience Management process. You will review the primary process for a Customer Experience object by taking on multiple roles to create and evaluate the Customer Experience object, create general and product activities, complete the assigned activities and complete the Customer Experience object summary and review.

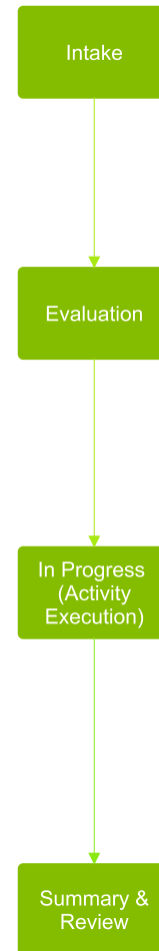
At the end of each module, you will complete a set of review questions to reinforce critical topics from that module. At the end of the course, you will complete a course assessment in PTC University Proficiency intended to evaluate your understanding of the course as a whole.

This course has been developed using Windchill 11.0 F000.



Course Objectives

- Understand the basics of Windchill and Windchill Customer Experience Management.
- Locate and view data in Windchill Customer Experience Management.
- Understand the Customer Experience Management process in Windchill Customer Experience Management.
- Create a new Customer Experience object.
- Evaluate a Customer Experience object.
- Assign general and product activities to a Customer Experience object.
- Complete all general and product activities.
- Complete summary and review details for a Customer Experience object.
- Understand important Customer Experience Management Work Management topics.



Prerequisites

- Basic browser and Web navigation skills
- Basic understanding of product management processes and deliverables

Audience

- This course is intended for any Windchill Customer Experience Management user requiring guidance for using Windchill Customer Experience Management. People in related roles will also benefit from taking this course.
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Agenda

Day 1

Module	1	Introduction to Windchill Customer Experience Management
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Module	2	Locating Information
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Module	3	Viewing Information
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Module	4	Customer Experience Management Process Overview
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Module	5	Customer Experience Intake
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Day 2

Module	6	Customer Experience Evaluation
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Module	7	Customer Experience In Progress (Activity Execution)
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Module	8	Customer Experience Summary and Review
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Module	9	Windchill Customer Experience Management Work Management
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Course Content

Module 1. Introduction to Windchill Customer Experience Management

- i. PTC Global Quality Solution
- ii. Windchill Customer Experience Management
- iii. Windchill Customer Experience Management Out-of-the-Box Workflow
- iv. Windchill Customer Experience Management Environment
- v. Data Management Objects
- vi. Storage Locations
- vii. Logging On to Windchill
- viii. Understanding the Windchill User Interface
- ix. Using the Home Page
- x. Using Quick Links
- xi. Using the Navigator
- xii. Using the Breadcrumb Trail
- xiii. Quality Contexts
- xiv. The Customer Experience Table
- xv. Customer Experiences
- xvi. Process Controls
- xvii. Accessing Help

Knowledge Check Questions

Module 2. Locating Information

- i. Locating Information
- ii. Using Simple Search
- iii. Using Advanced Search
- iv. Saving Searches
- v. Managing Searches
- vi. Browsing for Foldered Objects
- vii. Browsing for Customer Experience Objects

Knowledge Check Questions

Module 3. Viewing Information

- i. Using Windchill Tables
 - ii. Working with Table Columns
 - iii. Managing Windchill Table Views
 - iv. New View Set Name
 - v. New View Choose Object Types
 - vi. New View Set Filters
 - vii. New View Set Column Display
 - viii. New View Set Sorting
 - ix. Understanding Information Pages
 - x. Customizing Information Pages
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- xi. Customer Experience Object Capabilities
- xii. Activities
- xiii. Customer Experience Activities
- xiv. Customer Experience Product Activities
- xv. Customer Experience Product Investigation Activities
- xvi. Regulatory Decision Activities
- xvii. Examining Windchill Parts

Knowledge Check Questions

Module 4. Customer Experience Management Process Overview

- i. Customer Experience Management Process Overview
- ii. Customer Experience Objects
- iii. Roles in the Customer Experience Management Process

Knowledge Check Questions

Module 5. Customer Experience Intake

- i. Customer Experience Management Intake Process Overview
- ii. Creating a New Customer Experience
- iii. New Customer Experience - Set Attributes
- iv. New Customer Experience - Set Attachments
- v. New Customer Experience - Select Associations

Knowledge Check Questions

Module 6. Customer Experience Evaluation

- i. Customer Experience Management Evaluation Process Overview
- ii. Evaluating a Customer Experience
- iii. Entering Evaluation Details
- iv. Evaluation
- v. Customer Experience Activities
- vi. Product Activities

Knowledge Check Questions

Module 7. Customer Experience In Progress (Activity Execution)

- i. Customer Experience Management In Progress (Activity Execution) Process Overview
 - ii. Activity Execution – Customer Experience Product Investigation Activity Process Overview
 - iii. Returned Product Processing
 - iv. Entering Returned Product Processing Details
 - v. Product Investigation
 - vi. Product Investigation – Enter Product Investigation Details
 - vii. Activity Execution – Customer Experience Activity Process Overview
 - viii. Completing Customer Experience Activity
 - ix. Activity Response – Enter Response Details
 - x. Completing Activity Review
 - xi. Entering Activity Review Details
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- xii. Activity Execution – Reporting Activity Process Overview
- xiii. eMDR Decision
- xiv. Entering eMDR Decision Details
- xv. eMDR Creation
- xvi. Entering eMDR Report Creation Details
- xvii. Edit eMDR – Set Attributes
- xviii. Editing eMDR Codes
- xix. Setting eMDR Attachments
- xx. Editing eMDR Product Details
- xxi. eMDR Approval
- xxii. eMDR Submission Process
- xxiii. Other Reporting Submission Process

Knowledge Check Questions

Module 8. Customer Experience Summary and Review

- i. Customer Experience Summary and Review Process Overview
- ii. Reviewing Customer Experience Objects

Knowledge Check Questions

Module 9. Windchill Customer Experience Management Work Management

- i. Managing Your Windchill Notebook
 - ii. Using Your Windchill Clipboard
 - iii. Introduction to Communication Mechanisms
 - iv. Managing Subscriptions
 - v. Creating Subscriptions
 - vi. E-mailing Team Members
 - vii. E-mailing a Page URL
 - viii. Holding Discussions
 - ix. Holding Meetings
 - x. Scheduling Meetings
 - xi. Managing Your Calendar
 - xii. Preference Management
 - xiii. Setting Attachment Preferences
 - xiv. Setting Search Preferences
 - xv. Setting Table Preferences
 - xvi. Deleting Objects
 - xvii. The Save As Feature
 - xviii. The Rename Feature
 - xix. The Revise Feature
 - xx. The Set State Feature
 - xxi. Managing Folders
 - xxii. Event Management
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xxiii. Software Downloads
Knowledge Check Questions



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