

Introduction to PTC Windchill PDMLink 11.0 for the Implementation Team

Overview

Course Code TRN-4752-T

Course Length 16 Hours

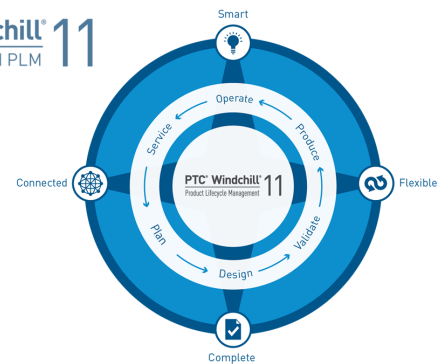
In this course, you will learn how to complete basic Windchill PDMLink functions. You will learn how to access and navigate the Windchill PDMLink environment, use Windchill PDMLink's visualization tools, manage CAD and product information, and manage product information changes. Other topics include how to use Windchill PDMLink's communication and collaboration tools, and access user support functions and information.

This course is designed to provide broad and basic coverage of Windchill PDMLink functionality to members of the Implementation Team. After completing the course, you will have a comprehensive understanding of Windchill PDMLink capabilities, which will enable you to contribute to the successful implementation of Windchill PDMLink to meet your company's Product Lifecycle Management goals.

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.

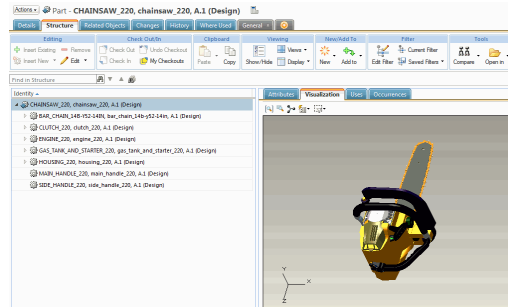
This course has been developed using Windchill 11.0 F000 / Creo Parametric 3.0 M070.

PTC® Windchill® 11
Smart Connected PLM



Course Objectives

- Understand the Windchill PDMLink environment and terminology
- Locate and view product information
- View information using Creo View Lite
- Understand the principles of CAD data management
- Initiate new designs and share design information
- Modify and manage design information
- Understand the principles of product structure management
- Create and manage product structures
- Create and manage documents
- Understand the Windchill PDMLink change process
- Initiate and implement product change
- Use Windchill PDMLink tools to manage your work



Prerequisites

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

Audience

- This course is intended for members of the Implementation Team who require a broad understanding of Windchill PDMLink functionality to successfully implement the system.

Agenda

Day 1

Module	1	Introduction to the Windchill Environment
Module	2	Locating Information
Module	3	Viewing Information
Module	4	Creating and Managing Documents
Module	5	Viewing Information using Creo View Lite
Module	6	Windchill MCAD Data Management Process Overview
Module	7	Manage Design Data
Module	8	Manage Design Development
Module	9	Windchill eBOM Creation Process Overview
Module	10	Create eBOM

Day 2

Module	11	Edit BOM
Module	12	Manage eBOM
Module	13	Generate and Compare BOM Reports
Module	14	Share and Export eBOM
Module	15	Change Management Process Overview
Module	16	Identify Need
Module	17	Investigate Need
Module	18	Change Planning
Module	19	Change Implementation
Module	20	Managing Your Work

Course Content

Module 1. Introduction to the Windchill Environment

- i. Windchill PDMLink
- ii. Introduction to the Windchill Environment
- iii. Data Management Objects
- iv. Change Management Objects
- v. Storage Locations
- vi. Iteration and Revision Controls
- vii. Process Controls
- viii. Access Controls
- ix. Collaboration Features
- x. Logging On to Windchill
- xi. Understanding the Windchill User Interface
- xii. Using the Home Page
- xiii. Using Quick Links
- xiv. Using the Navigator
- xv. Using the Breadcrumb Trail
- xvi. Navigating Products and Libraries
- xvii. Navigating Changes
- xviii. Accessing Help

Knowledge Check Questions

Module 2. Locating Information

- i. Locating Information
- ii. Using Simple Search
- iii. Using Advanced Search
- iv. Using Advanced Search - Type Section
- v. Using Advanced Search - Context Section
- vi. Using Advanced Search - Criteria Section
- vii. Using Advanced Search - Nested Queries
- viii. Using Advanced Search - Related Object Search
- ix. Advanced Search Report Template
- x. Search Results Table
- xi. Faceted Search Results
- xii. Saving Searches
- xiii. Managing Searches
- xiv. Browsing for Objects
- xv. Using Mini Information Pages

Knowledge Check Questions

Module 3. Viewing Information

- i. Using Windchill Tables
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- 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

Knowledge Check Questions

Module 4. Creating and Managing Documents

- i. Document Capabilities
- ii. Creating Documents and Links
- iii. New Document: Set Attributes - Type
- iv. New Document: Set Attributes - Template
- v. New Document: Set Attributes (Primary Content)
- vi. New Document: Set Attributes (Attributes)
- vii. New Document: Set Attachments
- viii. Modifying Documents - Check Out
- ix. Modifying Documents - Edit
- x. Modifying Documents - Check In
- xi. Modifying Documents - Undo Checkout
- xii. Modifying Documents - Replace Content
- xiii. Associating Documents with Windchill Parts

Knowledge Check Questions

Module 5. Viewing Information using Creo View Lite

- i. Understanding the Creo View User Interface
 - ii. Viewing Area User Interface
 - iii. Understanding the Ribbon
 - iv. The Creo View File Menu User Interface
 - v. Quick Access Toolbar User Interface
 - vi. Primary Panel User Interface
 - vii. Understanding the Upper Data Panel
 - viii. Understanding the Lower Data Panel
 - ix. Starting Creo View from Windchill
 - x. Loading Viewables
 - xi. Views Group
 - xii. Orienting the Model
 - xiii. Rendering Options
 - xiv. Viewing Drawings
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- xv. Working with Pages and Sheets

Knowledge Check Questions

Module 6. Windchill MCAD Data Management Process Overview

- i. CAD Data Management Process Overview
- ii. Introduction to CAD Documents
- iii. Introduction to Windchill Parts
- iv. Windchill Integration
- v. Windchill Integration CAD Menus
- vi. Windchill Integration – Model Tree
- vii. Windchill Integration – Folder Browser
- viii. Windchill Integration – Search
- ix. Windchill Integration – Embedded Browser
- x. Windchill Integration – Event Management
- xi. Registering a Windchill Server
- xii. Configuring the Creo Parametric Browser
- xiii. Introduction to the Workspace
- xiv. Workspace Layout
- xv. Understanding the Workspace Architecture

Knowledge Check Questions

Module 7. Manage Design Data

- i. Manage Design Data Process Overview
 - ii. Activate Workspace
 - iii. Creating a Workspace
 - iv. Setting the General Workspace Preferences
 - v. Changing the Workspace Table View
 - vi. Customizing Workspace Table Views
 - vii. Creating CAD Models
 - viii. Importing CAD Data to Workspace
 - ix. Set Parameter Values
 - x. Setting the CAD Document Storage Location
 - xi. WTPart CAD Document Links
 - xii. WTPart CAD Document Links Example
 - xiii. Understanding Calculated and Content Links
 - xiv. Associating WTParts with CAD Documents
 - xv. Automatically Associating WTParts in the Workspace
 - xvi. Typical CAD Data Management Conflicts
 - xvii. Incomplete Objects
 - xviii. Resolving Incomplete Objects From the Information Page
 - xix. Resolving Incomplete Objects During Check In
 - xx. Understanding Check In
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- xxi. Understanding the Check In Options

Knowledge Check Questions

Module 8. Manage Design Development

- i. Manage Design Development Process Overview
- ii. Locating Design Information with Creo Parametric
- iii. Searching for Design Information
- iv. Browsing for Design Information
- v. Preview Information
- vi. Add to Workspace
- vii. Checking Out CAD Documents
- viii. Make Necessary Changes
- ix. Modification Process – Check Out a CAD Document
- x. Modification Process – Modify a CAD Document
- xi. Modification Process – Check In a CAD Document
- xii. Using Workspace Save As to Create New Designs
- xiii. Check for Updates
- xiv. Updating and Synchronizing Workspace Objects
- xv. Updating CAD Documents in the Workspace
- xvi. Data Organization - Manage Conflicts - Check In

Knowledge Check Questions

Module 9. Windchill eBOM Creation Process Overview

- i. eBOM Creation Process Overview
- ii. Product Structures and BOMs
- iii. End Item Parts in Product Structures
- iv. CAD Documents in Product Structures
- v. Documents in Product Structures
- vi. Creating Product Structures using a CAD-centric Approach
- vii. Creating Product Structures using a Part-centric Approach
- viii. The Product Structure Browser
- ix. The PSB Command Ribbon
- x. The Part Structure Panes
- xi. PSB Occurrences Tab
- xii. Finding Components in the Product Structure
- xiii. PSB Layout Options
- xiv. Product Structure Related Objects
- xv. PSB Visualization Tab
- xvi. Show Hide Related Information
- xvii. PSB Uses Tab

Knowledge Check Questions

Module 10. Create eBOM

- i. Create eBOM Process Overview
- ii. Create the eBOM Using CAD Auto Associate
- iii. Understanding Auto Associate for Creating Product Structures
- iv. The Auto Associate Action
- v. Create the eBOM Using the PSB
- vi. Building Product Structures
- vii. Create the eBOM Using Import From Spreadsheet
- viii. Create the eBOM Using Save As

Knowledge Check Questions

Module 11. Edit BOM

- i. Edit eBOM Process Overview
- ii. Use the CAD Tool to Edit the eBOM
- iii. Use the PSB to Edit the eBOM
- iv. Use a Spreadsheet to Edit the eBOM

Knowledge Check Questions

Module 12. Manage eBOM

- i. Manage eBOM Process Overview
- ii. Characteristics of Managed Baselines
- iii. Adding Objects to Baselines
- iv. Manage Life Cycle
- v. Usages and Occurrences
- vi. Assigning a Reference Designator
- vii. Editing Usage Attributes
- viii. WTPart and CAD Document Associations
- ix. Editing WTPart and CAD Document Associations
- x. Associating WTParts with Documents
- xi. Managing Structure Filters
- xii. Setting the Latest Filter
- xiii. Setting the Baseline Filter
- xiv. Setting the Effectivity Filter
- xv. Setting the Promotion Request Filter
- xvi. Setting the Attribute Filter
- xvii. Setting the Spatial Filter
- xviii. Bill of Materials Notes
- xix. Creating Bill of Materials Notes
- xx. Creating Bill of Materials Notes from Templates

Knowledge Check Questions

Module 13. Generate and Compare BOM Reports

- i. Generate and Compare BOM Reports Overview
 - ii. Generating BOM Reports
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*Knowledge Check Questions***Module 14. Share and Export eBOM**

- i. Share and Export eBOM Overview
- ii. Export Using Import–Export
- iii. Export Using PSB
- iv. Export Using Package
- v. Share BOM to Project
- vi. Export from Visualization

*Knowledge Check Questions***Module 15. Change Management Process Overview**

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

*Knowledge Check Questions***Module 16. Identify Need**

- i. Identify Need Process Overview
- ii. Creating Problem Reports
- iii. New Problem Report: Set Attributes
- iv. New Problem Report: Select Affected End Items
- v. New Problem Report: Select Affected Objects
- vi. New Problem Report: Set Attachments
- vii. New Problem Report: Select Associations
- viii. Analyzing Problem Reports - Task Details

*Knowledge Check Questions***Module 17. Investigate Need**

- i. Investigate Need Process Overview
- ii. Creating Change Requests
- iii. New Change Request - Set Attributes
- iv. New Change Request - Select Affected End Items
- v. New Change Request - Select Affected Objects
- vi. New Change Request - Set Attachments
- vii. New Change Request - Select Associations
- viii. Impact Analysis
- ix. Effectivity Planning
- x. Analyzing Change Requests - Task Details
- xi. Investigate Need Full Track Process Overview
- xii. Schedule CRB Review - Task Details

*Knowledge Check Questions***Module 18. Change Planning**

- i. Change Planning Process Overview
- ii. Creating Change Notices
- iii. New Change Notice - Set Attributes
- iv. New Change Notice - Define Implementation Plan
- v. New Change Task - Set Attributes
- vi. New Change Task - Select Affected/Resulting Objects
- vii. Setting Effectivity
- viii. Setting the Disposition of the Affected Objects
- ix. Superseding an Affected Object
- x. New Change Notice - Set Attachments
- xi. New Change Notice - Select Associations
- xii. Change Planning Full Track Process Overview
- xiii. Change Implementation Board Review

Knowledge Check Questions

Module 19. Change Implementation

- i. Change Implementation Process Overview
- ii. Implementing Change
- iii. Reviewing Implementation Results
- iv. Review and Audit Change - Process Overview
- v. Auditing Change Notice
- vi. Reviewing Business Rule Conflicts
- vii. Executing Ad Hoc Modifications
- viii. Completing the Change Process

Knowledge Check Questions

Module 20. Managing Your Work

- i. Managing Your Work
- ii. Participating in Processes
- iii. Completing Tasks
- iv. Viewing Processes
- v. Promotion Requests
- vi. Viewing Promotion Requests
- vii. Completing Promotion Tasks
- viii. Introduction to Communication Mechanisms
- ix. Managing Subscriptions
- x. Holding Discussions
- xi. Preference Manager
- xii. Using the Windchill Clipboard
- xiii. Managing Folders
- xiv. Software Downloads

Knowledge Check Questions
