

Introduction to PTC Windchill Service Information Manager 11.0

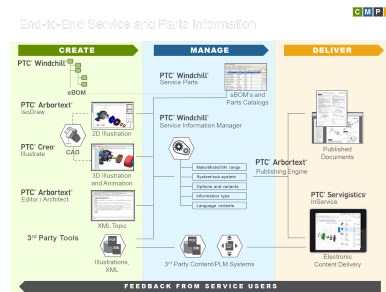
Overview

Course Code	TRN-4570-T
Course Length	8 Hours

In this course, you will learn how to complete basic functions to navigate and view information within Windchill Service Information Manager. You will also learn how to access and navigate the Windchill Service Information Manager environment, view product information, manage assigned tasks, and perform basic work management functions. After completing this course, you will be able to complete basic Windchill Service Information Manager tasks and activities, as well as have a better understanding of how to use the Windchill Service Information Manager system.

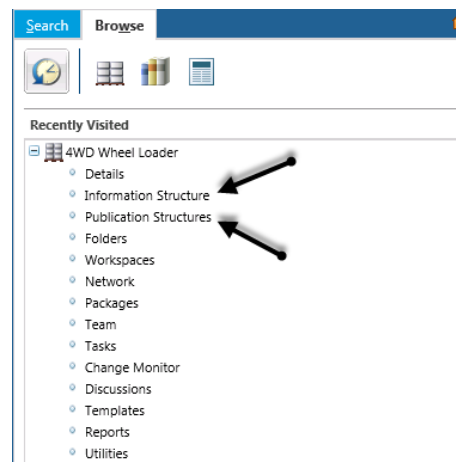
At the end of each module, you will complete a set of review questions to reinforce critical topics from that module. At the end of the course, you will complete a course assessment in PTC University Proficiency intended to evaluate your understanding of the course as a whole.

This course has been developed using Windchill 11.0 F000.



Course Objectives

- Understand the Windchill Service Information Manager environment and terminology
- Locate product information
- View product information
- Use Windchill Service Information Manager tools to manage your work
- Participate in Windchill Service Information Manager processes



Prerequisites

- Basic browser and Web navigation skills

Audience

- This course is intended for those who need to access the Windchill Service Information Manager system to view information, perform system tasks, or use product information when making business decisions. People in related roles will also benefit from taking this course.
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Agenda

Day 1

Module	1	Introduction to the Windchill Environment
Module	2	Locating Information
Module	3	Viewing Information
Module	4	Creating Documents and Links
Module	5	Modifying and Managing Documents
Module	6	Managing Your Work
Module	7	Communication and Collaboration
Module	8	Participating in Processes
Module	9	Performing Common Tasks

Course Content

Module 1. Introduction to the Windchill Environment

- i. Introduction to the Windchill Environment
- ii. Introduction to Windchill Service Information Manager
- iii. Introduction to Windchill Objects
- iv. Storage Locations
- v. Iteration and Revision Controls
- vi. Process Controls
- vii. Access Controls
- viii. Collaboration Features
- ix. Logging On to Windchill
- x. Understanding the Windchill User Interface
- xi. Using the Home Page
- xii. Using Quick Links
- xiii. Using the Navigator
- xiv. Using the Breadcrumb Trail
- xv. Navigating Products and Libraries
- xvi. Accessing the Information and Publication Structure Editors
- xvii. 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
 - ii. Working with Table Columns
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- 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
- xi. Viewing Structure
- xii. Understanding Object Capabilities
- xiii. Information Structures
- xiv. Information Groups
- xv. Content Holders
- xvi. Publication Structures
- xvii. Publication Sections
- xviii. Table of Contents
- xix. Indices
- xx. Content Holders
- xxi. Document Capabilities

Knowledge Check Questions

Module 4. Creating Documents and Links

- 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. New Multiple Documents
- ix. Creating Links
- x. Document Preferences
- xi. Attachment Preferences

Knowledge Check Questions

Module 5. Modifying and Managing Documents

- i. Overview of Modifying Documents
 - ii. Modifying Documents - Check Out
 - iii. Modifying Documents - Edit
 - iv. Modifying Documents - Check In
 - v. Modifying Documents - Undo Checkout
 - vi. Modifying Documents - Replace Content
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- vii. Modifying Documents - Revise
- viii. Adding Documents to Baselines

Knowledge Check Questions

Module 6. Managing Your Work

- i. Managing Your Work
- ii. Managing Tasks
- iii. Managing Recently Modified Objects
- iv. Managing Checked-Out Objects
- v. Managing the Notebook
- vi. Managing Subscriptions
- vii. Creating Subscriptions
- viii. Generating Reports

Knowledge Check Questions

Module 7. Communication and Collaboration

- i. Introduction to Communication Mechanisms
- ii. E-mailing Team Members
- iii. E-mailing a Page
- iv. Holding Discussions

Knowledge Check Questions

Module 8. Participating in Processes

- i. Promotion Requests
- ii. Viewing Promotion Requests
- iii. Creating Promotion Requests
- iv. Participating in Processes
- v. Completing Tasks
- vi. Completing Promotion Tasks
- vii. Viewing Processes
- viii. Reassigning Workflow Tasks
- ix. Managing Your Calendar

Knowledge Check Questions

Module 9. Performing Common Tasks

- i. Preference Manager
 - ii. Editing Multiple Objects
 - iii. Moving Objects
 - iv. Deleting Objects
 - v. The Save As Feature
 - vi. The Rename Feature
 - vii. The Set State Feature
 - viii. Using the Windchill Clipboard
 - ix. Managing Folders
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- x. Event Manager
- xi. Software Downloads

Knowledge Check Questions



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