

## The Windchill 11.0 Service and Parts Information Process

### Overview

Course Code TRN-4575-T

Course Length 40 Hours



In this course, you will learn the Service and Parts Information solution's best practices. You will also learn each best practice's sub-step, and become familiar with the various software application germane to the solution. 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 Service Information Manager 11.0.

### Course Objectives

- Understand create, manage, and deliver solution components
- Define the major storyboard solution steps
- Define the Service Specific Product Breakdown best practice
- Define the Author Illustrations best practice
- Define the Author Content best practice
- Define the Publication Structures best practice
- Define the Translate Service Information best practice
- Define the Release and Deliver best practice
- Create the product hierarchy
- Manage information structures
- Assign applicability
- Identify service content requirements
- Understand the review and approve process
- Understand the release updates to delivery or translation process
- Navigate an existing parts list
- Create a new parts list
- Search for and add an sBOM
- Understand parts list item attributes
- Understand the Items tab
- Add parts list metadata
- Add parts list item applicability
- Update equivalent parts

- Reconcile part structures
  - Create part illustrations
  - View Engineering and Service Bills of Materials difference using Creo View
  - Understand the process used to author content
  - Define and use different types of information elements
  - Identify the different information element objects
  - Assign existing item choices
  - Add content to groups
  - Use related applications to add information structure content
  - Define Publication Structure business objects
  - Describe how information and business objects are managed in Publication Structures
  - Access the Publication Structure Editor
  - Navigate and recognize user interface components of the Publication Structure Editor
  - Create a new Publication Structure from the Create New Publication Structure window
  - Create a new Publication Structure from an existing Publication Structure, or from the hierarchy of an existing Publication Structure
  - Add content to a Publication Structure
  - Modify the hierarchy of a Publication Structure
  - Replace Publication Structure content with a local copy and save a Publication Structure object as a new object
  - Work with and edit Publication Structure attributes
  - Rearrange and remove Publication Structure objects from a Publication Structure
  - Assign Item Choices to Publication Structures objects
  - Generate a Publication Structure translation document and publish a representation
  - Understand attributes and applicability rules
  - Create options and choices
  - Create and use include, exclude, and enable rules
  - Add option pool choices to option sets
  - Apply applicability rules at various levels
  - Understand the best practice four sub-steps
  - Understand translation management configuration
  - Investigate releasing content to enable the translation process
  - Explore content object collection
  - Generate a translation package
  - Understand the review process
  - Understand the InService overall process
  - Execute tasks using the Task Manager
  - Explore various InService configuration files
  - Add collections to InService
  - Perform Transform and Load tasks
  - Enable notifications
  - Identify various bundle files
  - Monitor and schedule tasks
  - Troubleshoot InService
  - Understand navigating, searching, and filtering service information using InService
  - Identify parts information
  - View all types of available service information
  - Understand InService shopping carts
-

## Prerequisites

---

- Introduction to Windchill Service Information Manager 11.0

## Audience

---

- This course is intended for those who need to understand the best practices involved with creating, managing, and delivering service information. People in related roles will also benefit from taking this course.
-

## Agenda

### Day 1

---

Module	1	The PTC Service & Parts Information Solution
Module	2	Defining the Service-Specific Product Breakdown
Module	3	Authoring Illustrations Best Practice
Module	4	Defining the Authoring Content Best Practice
Module	5	Defining Publication Structures Best Practice
Module	6	Understanding Component-Based Translation Management
Module	7	Reviewing the Release and Deliver Best Practice
Module	8	Defining the Service-Specific Product Breakdown

### Day 2

---

Module	9	Getting Started with the Information Structure Editor
Module	10	Creating New Information Structures
Module	11	Working with Groups
Module	12	Managing Options, Choices, and Rules
Module	13	Identify Service Content Requirements, Review, Approve, and Release Best Practice Steps
Module	14	Creating New Parts Lists
Module	15	Navigating a Parts List

### Day 3

---

Module	16	Defining the Authoring Content Best Practice
Module	17	Working with Content Objects
Module	18	Getting Started with the Publication Structure Editor
Module	19	Creating and Adding Content to Publication Structures
Module	20	Reusing, Modifying, and Publishing Publication Structures

### Day 4

---

Module	21	Managing Options, Choices, and Rules
Module	22	Identify Service Content Requirements, Review, Approve, Publish, and Release Best Practice Steps
Module	23	Understanding Component-Based Translation Management

---

## Day 5

---

Module 24 InService Publishing and Loading Configuration

Module 25 Reviewing the Release and Deliver Best Practice

---

## Course Content

### Module 1. The PTC Service & Parts Information Solution

- i. The PTC Technical & Service Parts Information Solution
- ii. Task Utilization
- iii. Traditional Prepublished Content Compared to Delivery Applications
- iv. Examining the Solution Storyboard
- v. Reviewing the Technical Information and Service Parts Information Solutions
- vi. Understanding Document-centric Compared with Product-centric Organization
- vii. Understanding Bills of Materials and Product Structure
- viii. Reviewing BOM Transformation
- ix. Understanding Applicability
- x. Configuring Specific Publications
- xi. Reviewing Illustrated Parts Catalogs
- xii. Understanding an Illustrated Parts Diagram

#### *Knowledge Check Questions*

### Module 2. Defining the Service-Specific Product Breakdown

- i. Defining the Service-Specific Product Breakdown
  - ii. Understanding the Context-Based Technical and Service Parts Information Management Best Practice
  - iii. Understanding Product Hierarchy
  - iv. Investigating Product Hierarchy Concept Mapping
  - v. Visualizing the Product Family
  - vi. Visualizing the Type Product Hierarchy
  - vii. Visualizing the Model Product Hierarchy
  - viii. Creating the Product Hierarchy
  - ix. Defining an Information Structure
  - x. Defining Information Structure Business Objects
  - xi. Accessing the Information Structure Editor
  - xii. Understanding Information Structure Business Objects
  - xiii. Creating and Populating an Information Structure
  - xiv. Adding Graphics and Representations to Information Structure Nodes
  - xv. Nesting Information Structures
  - xvi. Saving an Information Structure as a New Structure
  - xvii. Creating a New Master Structure
  - xviii. Using Multiple Information Structures
  - xix. Viewing the Information Structure InService
  - xx. Managing Information Structures
  - xxi. Recommending Information Structure Best Practices
  - xxii. Defining Applicability
  - xxiii. Understanding Basic Expressions
-

- xxiv. Understanding Applicability Types
- xxv. Using Basic Expressions
- xxvi. Understanding Service Effectivity
- xxvii. Using the Manage Applicability Dialog Box
- xxviii. Associating BOM-Driven Serviceable Part Management
- xxix. Understanding the Service Parts Module
- xxx. Understanding Bills of Materials and Product Structure
- xxxi. Reviewing BOM Transformation
- xxxii. Understanding Part Chains and Part Relationships
- xxxiii. Understanding an Illustrated Parts Diagram
- xxxiv. Exploring Business Objects and Terminology
- xxxv. Viewing the Parts List Editor
- xxxvi. Generating Parts List from the sBOM

*Knowledge Check Questions*

**Module 3. Authoring Illustrations Best Practice**

- i. Defining Authoring Illustrations
- ii. Creating Illustrations from CAD Geometry Associated with Parts in Windchill
- iii. Creating Illustration from CAD Geometry Not Stored in Windchill - Parts List in Windchill
- iv. Creating Illustration from CAD Geometry Stored in Windchill - Not Associated with Parts Information
- v. Working with 2-D Illustrations
- vi. Investigating Best Practice Sub-steps for CAD-Based 2-D and 3-D Technical Illustrations
- vii. Opening a Parts List in the Parts List Editor
- viii. Creating an Illustration from a Parts List
- ix. Finalizing the Illustration Manually
- x. Checking the Illustration into Windchill
- xi. Understanding Revisions and Updates

*Knowledge Check Questions*

**Module 4. Defining the Authoring Content Best Practice**

- i. Defining Authoring Content
- ii. Defining an Information Element
- iii. Creating Information Elements
- iv. Creating New Information Elements
- v. Authoring Content Best Practice Steps

*Knowledge Check Questions*

**Module 5. Defining Publication Structures Best Practice**

- i. Defining Publication Structures
  - ii. Investigating a Publication Structure
  - iii. Using Information Structure Components in a Publication Structure
  - iv. Publication Structure Business Objects
  - v. Understanding Publication Structure Capabilities
-

- vi. Creating a New Publication Structure
- vii. Populating Publication Structures
- viii. Populating Publication Structures from the Information Structure
- ix. Generating the Publication Structure from an Information Structure
- x. Generating a Publication Structure Representation
- xi. Recommending Publication Structure Best Practices
- xii. Examining Publication Structures in InService
- xiii. Examining Document-Centric Service Information Management

*Knowledge Check Questions*

**Module 6. Understanding Component-Based Translation Management**

- i. Defining Component-Based Translation Management
- ii. Understanding Component-Based Translation Management
- iii. Setting Content to a Released State
- iv. Setting the State
- v. Collecting Objects and Dependents
- vi. Generating the Translation Package
- vii. Examining the Package Contents
- viii. Importing the Completed Translations
- ix. Examining the Translation Content Tab
- x. Reviewing Translated Content
- xi. Editing Translated Information Elements
- xii. Re-importing the Translation Package

*Knowledge Check Questions*

**Module 7. Reviewing the Release and Deliver Best Practice**

- i. Defining Service Content Delivery
- ii. Reviewing the Release and Deliver Best Practice Steps
- iii. Navigating, Filtering, and Searching Using InService
- iv. Viewing Related Part Information
- v. Viewing Related Service Information
- vi. Ordering Parts Using InService

*Knowledge Check Questions*

**Module 8. Defining the Service-Specific Product Breakdown**

- i. Defining the Service-Specific Product Breakdown
  - ii. Understanding the Context-Based Technical and Service Parts Information Management Best Practice
  - iii. Creating the Product Hierarchy
  - iv. Creating Product Hierarchy Base Objects
  - v. Creating Product Hierarchy Reusable Attributes
  - vi. Representing Information Structure Attributes in Windchill Service Information Manager
  - vii. Creating Family, Type, and Model Folders
-



- viii. Adding Navigation Graphics

*Knowledge Check Questions*

**Module 9. Getting Started with the Information Structure Editor**

- i. Managing Information Structures
- ii. Understanding the Information Structure View
- iii. Defining Information Structure Business Objects
- iv. Managing Information in the Information Structure
- v. Service Information Manager Preferences
- vi. Viewing the Default Information Structure
- vii. Accessing the Information Structure Editor
- viii. Navigating the Information Structure Editor

*Knowledge Check Questions*

**Module 10. Creating New Information Structures**

- i. Creating New Information Structures
- ii. Creating a New Information Structure
- iii. Saving an Information Structure as a New Structure
- iv. Creating a New Master Structure
- v. Setting as Primary Information Structure

*Knowledge Check Questions*

**Module 11. Working with Groups**

- i. Inserting Groups
- ii. Understanding Groups
- iii. Understanding Nested Groups
- iv. Adding Content to Information Structures
- v. Adding Groups
- vi. Searching for Groups
- vii. Using Find in Structure
- viii. Reusing Item Choices on Groups
- ix. Viewing Information Structure Content Holder Item Choices
- x. Managing Applicability
- xi. Editing Group Content
- xii. Removing Group Content
- xiii. Revising Group Content
- xiv. Adding Graphical Representations to Information Groups
- xv. Nesting and Reusing Information Structures

*Knowledge Check Questions*

**Module 12. Managing Options, Choices, and Rules**

- i. Assigning Applicability
  - ii. Understanding Applicability Rules
  - iii. Understanding Attributes
-

- iv. Using Options and Choices
- v. Using Include and Exclude Rules
- vi. Understanding Enable Rules
- vii. Understanding Applicability Rules Inheritance
- viii. Understanding Option Set Attributes
- ix. Creating an Option Set
- x. Creating an Option Set Copy

*Knowledge Check Questions*

**Module 13. Identify Service Content Requirements, Review, Approve, and Release Best Practice**

**Steps**

- i. Identifying Service Content Requirements
- ii. Inserting an Existing Textual Information Element
- iii. Creating a New Textual Information Element from a Template
- iv. Creating New Information Elements
- v. Inserting an Existing Parts List Information Element
- vi. Creating a New Parts List Information Element from an sBOM
- vii. Inserting an Existing PDF Information Element
- viii. Reviewing and Approving
- ix. Releasing to Delivery or Translation

*Knowledge Check Questions*

**Module 14. Creating New Parts Lists**

- i. Defining Authoring Illustrations
- ii. Creating Illustrations from CAD Geometry Associated with Parts in Windchill
- iii. Investigating Best Practice Sub-steps for CAD-Based 2-D and 3-D Technical Illustrations
- iv. Opening a Parts List in the Parts List Editor
- v. Navigating the Parts List Editor
- vi. The Add Part Dialog Box
- vii. The Edit Filter Dialog Box
- viii. The Add Illustration Dialog Box
- ix. Adding a New Parts List
- x. Importing and Exporting Parts Lists
- xi. Generating a Parts List from sBOM Parts
- xii. Searching for an sBOM from the Parts List Editor
- xiii. Adding an sBOM from the Parts List Editor
- xiv. Understanding Parts List Item Attributes

*Knowledge Check Questions*

**Module 15. Navigating a Parts List**

- i. Understanding the Items Tab
  - ii. Ordering the Parts List
  - iii. Using the Service Associative Part Structure Browser
-

- iv. Creating an Illustration from a Parts List
- v. Finalizing the Illustration Manually
- vi. Checking the Illustration into Windchill
- vii. Creating Illustrations Using Creo Illustrate
- viii. Understanding Revisions and Updates

*Knowledge Check Questions*

**Module 16. Defining the Authoring Content Best Practice**

- i. Defining Authoring Content
- ii. Defining an Information Element
- iii. Creating Information Elements
- iv. Creating New Information Elements
- v. Authoring Content Best Practice Steps

*Knowledge Check Questions*

**Module 17. Working with Content Objects**

- i. Creating Using Arbortext Editor
- ii. Using Arbortext Styler
- iii. Using XML
- iv. Topic-based Authoring
- v. Understanding DITA
- vi. Understanding the Technical Information Application
- vii. Viewing Information Structure Content Holder Objects
- viii. Viewing Information Structure Content Holder Item Choices
- ix. Managing Applicability
- x. Reviewing the Task
- xi. Updating Information Element Content
- xii. Adding Content to Information Structures
- xiii. Information Structure Product Integrations
- xiv. Revising Group Content
- xv. Comparing Content Objects
- xvi. Opening Content Objects in Related Applications
- xvii. Reviewing the Information Element

*Knowledge Check Questions*

**Module 18. Getting Started with the Publication Structure Editor**

- i. Defining Publication Structures
  - ii. Investigating a Publication Structure
  - iii. Using Information Structure Components in a Publication Structure
  - iv. Publication Structure Business Objects
  - v. Understanding Publication Structure Capabilities
  - vi. Publication Structures
  - vii. Managing Information in Publication Structures
-

- viii. The Publication Structures Table
- ix. Publication Structure Information Page Tabs
- x. Publication Structure Attributes
- xi. Accessing the Publication Structure Editor
- xii. Navigating the Publication Structure Editor

*Knowledge Check Questions*

**Module 19. Creating and Adding Content to Publication Structures**

- i. Creating a Publication Structure
- ii. Creating a New Publication Structure
- iii. Generating a Publication Structure from an Information Structure
- iv. Saving an Existing Publication Structure as a New Publication Structure
- v. Saving an Existing Publication Structure as a New Master Publication Structure
- vi. Adding a Table of Contents to a Publication Structure
- vii. Adding an Index to a Publication Structure
- viii. Adding Content in an Information Structure to a Publication Structure
- ix. Adding Textual Content to a Publication Structure
- x. Adding a Parts List Holder to a Publication Structure
- xi. Adding a New Publication Structure Section to a Publication Structure
- xii. Adding Multiple New Publication Sections to a Publication Structure
- xiii. Adding Existing Publication Sections and Publication Structures to a Publication Structure
- xiv. Replacing Publication Structure Content with a Local Copy
- xv. Saving a Publication Structure Object as a New Object

*Knowledge Check Questions*

**Module 20. Reusing, Modifying, and Publishing Publication Structures**

- i. Identifying Existing Structures for Reuse
- ii. Searching for Content to Include in a Publication Structure
- iii. Using Find in a Publication Structure
- iv. Renaming Publication Structure Objects
- v. Editing Publication Structure Attributes
- vi. Removing Objects from a Publication Structure
- vii. Rearranging Objects in a Publication Structure
- viii. Opening Publication Structure Objects in a Windchill Integrated Editor

*Knowledge Check Questions*

**Module 21. Managing Options, Choices, and Rules**

- i. Assigning Applicability
  - ii. Understanding Applicability Rules
  - iii. Understanding Attributes
  - iv. Using Options and Choices
  - v. Using Include and Exclude Rules
  - vi. Understanding Enable Rules
-

- vii. Understanding Applicability Rules Inheritance
- viii. Understanding Option Set Attributes
- ix. Creating an Option Set
- x. Creating an Option Set Copy
- xi. Defining Applicability for Publication Structure Objects

*Knowledge Check Questions*

**Module 22. Identify Service Content Requirements, Review, Approve, Publish, and Release Best Practice Steps**

- i. Inserting an Existing Textual Information Element
- ii. Creating New Information Elements
- iii. Inserting an Existing Parts List Information Element
- iv. Creating a New Parts List Information Element from an sBOM
- v. Inserting an Existing PDF Information Element
- vi. Reviewing and Approving
- vii. Releasing to Delivery or Translation
- viii. Generating a Translation Document for a Publication Structure
- ix. Generating a Publication Structure Representation

*Knowledge Check Questions*

**Module 23. Understanding Component-Based Translation Management**

- i. Defining Component-Based Translation Management
  - ii. Understanding Component-Based Translation Management
  - iii. Understanding Translation Support Preferences
  - iv. Setting Up Languages
  - v. Creating Translation Library or Product Contexts
  - vi. Setting the Translation Coordinator Roles Preference
  - vii. Creating External Folders
  - viii. Defining Source Languages
  - ix. Defining Supported Languages
  - x. Specifying Language Pairs
  - xi. Defining Translatable Subtypes
  - xii. Creating Attributes
  - xiii. Modifying the Arbortext Editor Burst Rules
  - xiv. Enabling a Windchill Translation Name Attribute
  - xv. Understanding Additional Configuration
  - xvi. Setting Content to a Released State
  - xvii. Setting the State
  - xviii. Collecting Objects and Dependents
  - xix. Generating the Translation Package
  - xx. Examining the Package Contents
  - xxi. Importing the Completed Translations
-

- xxii. Examining the Translation Content Tab
- xxiii. Reviewing Translated Content
- xxiv. Editing Translated Information Elements
- xxv. Re-importing the Translation Package

*Knowledge Check Questions*

**Module 24. InService Publishing and Loading Configuration**

- i. Defining Service Content Delivery
- ii. Reviewing the Release and Deliver Best Practice Steps
- iii. Reviewing for Release
- iv. Releasing to Deliver
- v. Publishing to PDF
- vi. Publishing to InService
- vii. Transforming and Loading for InService
- viii. The InService Process, from Authoring to Delivery
- ix. Discussing Software Requirements
- x. Investigating Split Server Requirements
- xi. Security Certificates
- xii. Introducing the Task Manager
- xiii. Accessing the Task Manager
- xiv. Loading Default Tasks
- xv. Explaining the IMANConfig.xml Configuration File
- xvi. Investigating Bundle Source Configuration
- xvii. Understanding Priority Configuration
- xviii. Adding a Collection
- xix. Adding a PARTS Collection
- xx. Adding a PARTDOCUMENTS Collection
- xxi. Explaining Transform and Load Tasks
- xxii. Understanding Transformation, Automation, and Load Prerequisites
- xxiii. Exploring CSV Loading Tool Configuration and Data Loading
- xxiv. CSV Input Data
- xxv. Understanding the CSV File Format
- xxvi. Understanding CSV Bundle and Data Types Support
- xxvii. Configuring Notifications
- xxviii. Configuring New Mime Types
- xxix. Discussing Bundle Compatibility
- xxx. Understanding Bundle Sentinel Files
- xxxi. Investigating Supported Data Types
- xxxii. Scheduling Tasks
- xxxiii. Monitoring Tasks
- xxxiv. Troubleshooting InService

*Knowledge Check Questions*

---

**Module 25. Reviewing the Release and Deliver Best Practice**

- i. Navigating, Filtering, and Searching Using InService
- ii. Understanding the Get Started Page
- iii. Viewing Related Part Information
- iv. Viewing Related Service Information
- v. Ordering Parts Using InService

*Knowledge Check Questions*



**Visible Edge**

1-888-VIS-EDGE (847-3343)  
sales@visible-edge.com  
www.visible-edge.com