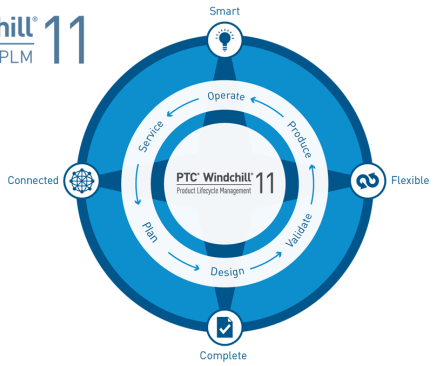
ptc university

Introduction to PTC Windchill PDMLink 11.1 for Light Users

Overview

Course Code	TRN-5210-T
Course Length	8 Hours



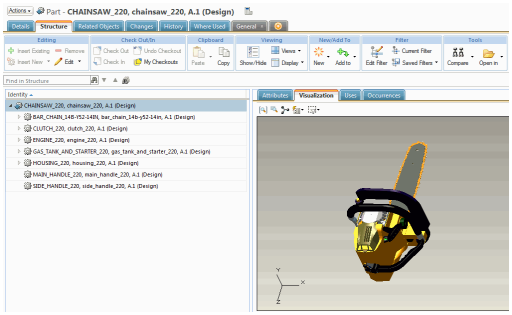
In this course, you will learn how to complete basic functions to navigate and view information within Windchill PDMLink. You will also learn how to access and navigate the Windchill PDMLink environment, view product information, use Windchill PDMLink's visualization tools, manage assigned tasks, and perform basic work management functions. In addition, you will learn how to use product information to make important business decisions. After completing the course, you will be able to complete basic Windchill PDMLink tasks and activities, as well as have a better understanding of how to use the Windchill PDMLink 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 Pro/FICIENCY intended to evaluate your understanding of the course as a whole.

This course has been developed using Windchill 11.1 F000 / Creo Parametric 4.0 M030.

Course Objectives

- Understand the Windchill PDMLink environment and terminology
- Locate product information
- View product information
- Understand visualization concepts and terminology
- Use Creo View Lite to view product information
- Use Windchill PDMLink tools to manage your work
- Participate in Windchill PDMLink processes



Prerequisites

- Basic browser and Web navigation skills

Audience

- This course is intended for users who need to access the Windchill PDMLink 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.

Agenda

Day 1

Module	1	Introduction to the Windchill Environment
Module	2	Locating Information
Module	3	Viewing Information
Module	4	Introduction to Visualization
Module	5	Using Creo View Lite to View and Annotate Information
Module	6	Managing Your Work
Module	7	Participating in Processes

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

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
xi. Viewing Structure
xii. Understanding Object Capabilities
xiii. Document Capabilities
xiv. CAD Document Capabilities
xv. Part and End Item Capabilities
xvi. Examining Dynamic Documents
xvii. Problem Report Capabilities
xviii. Change Request Capabilities
xix. Change Notice Capabilities

Knowledge Check Questions

Module 4. Introduction to Visualization

i. Identifying Visualization Concepts
ii. Identifying Visualized Intellectual Property Types
iii. Identifying Components in PTC's Visualization System
iv. Generating Creo View Viewables
v. Identifying Readable Visualization Object Types
vi. Understanding Creo View's Basic Capabilities
vii. Understanding the Creo View User Interface
viii. Viewing Area User Interface
ix. Understanding the Ribbon
x. The Creo View File Menu User Interface
xi. Quick Access Toolbar User Interface
xii. Primary Panel User Interface
xiii. Understanding the Upper Data Panel
xiv. Understanding the Lower Data Panel
xv. Starting Creo View as a Standalone Client
xvi. Starting Creo View from Windchill
xvii. Loading Viewables

Knowledge Check Questions

Module 5. Using Creo View Lite to View and Annotate Information

i. Opening Non-Model Files with Creo View

ii. Viewing Drawings
iii. Viewing Images
iv. Orienting Drawings and Images
v. Working with Pages and Sheets
vi. Marking Up Creo View Viewables
vii. Adding Annotation Objects
viii. Note Annotations
ix. Leader Line Annotations
x. Shape Annotations
xi. Freehand Annotations
xii. GTOL Annotations
xiii. Stamp Annotations
xiv. Measuring Lengths
xv. Measuring Distances
xvi. Measuring Angles
xvii. Measuring Diameter or Radius
xviii. Measuring Area
xix. Measuring Mass Properties
xx. Taking a Measurement Summary
xxi. Taking an Envelope Measurement
xxii. Creating Annotation Sets
xxiii. Saving Annotation Sets to a PDM System
xxiv. Retrieving Annotation Sets from a PDM System

Knowledge Check Questions

Module 6. Managing Your Work

i. Managing Your Work
ii. Managing Tasks
iii. Managing the Notebook
iv. Introduction to Communication Mechanisms
v. Managing Subscriptions
vi. Creating Subscriptions
vii. Holding Discussions
viii. E-mailing Team Members
ix. E-mailing a Page
x. Preference Manager
xi. Setting Attachment Preferences
xii. Setting Search Preferences
xiii. Setting Display Preferences
xiv. Setting Table Preferences
xv. Setting Visualization Preferences
xvi. Using the Windchill Clipboard

xvii. Software Downloads

Knowledge Check Questions

Module 7. Participating in Processes

i. Participating in Processes
ii. Completing Tasks
iii. Completing Promotion Tasks
iv. Viewing Processes
v. Reassigning Workflow Tasks
vi. Managing Your Calendar

Knowledge Check Questions