

# Introduction to PTC Windchill PDM Essentials 11.1 for Creo Parametric Users

## Overview

Course Code TRN-5214-T

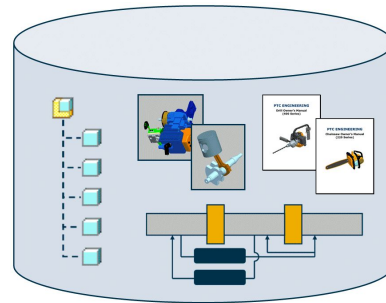
Course Length 16 Hours

In this course, you will learn how to access and view information within Windchill PDM Essentials. You will also discover how to navigate the PDM Essentials environment, view product information, use PDM Essentials' visualization tools, manage assigned tasks, and perform basic work management functions. Additionally, you will be taught key capabilities and features of PDM Essentials CAD Data Management and how to use PDM Essentials to manage Creo design information. Specifically, you will focus on the day-to-day data management tasks required by the Creo user community. You will also learn how to use PDM Essentials to perform basic PDM functions on Creo CAD documents.

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 11.1 F000.

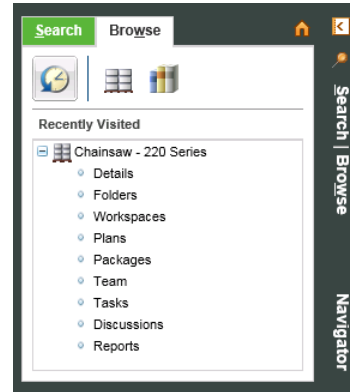
Since there is no specific course material for this, in this course, ProI/Creo profiled content is used to support training for PDME. It is decided to use single Virtual Machine environment to cover all of the Windchill training, therefore you might see WTParts in various products while performing the exercises.



## Course Objectives

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- Understand the PDM Essentials environment and terminology
- Locate design information
- View design information
- Understand visualization concepts and terminology
- Use Creo View to view product information
- Use PDM Essentials tools to manage your work
- Participate in PDM Essentials processes
- Understand PDM Essentials architecture
- Understand workspaces and how workspaces are used
- Create new designs and share design information
- Modify and manage existing design information
- Understand file relationships and dependencies
- Manage family tables
- Use workspace frames



## Prerequisites

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- Basic browser and Web navigation skills
- Working knowledge of Creo Parametric

## Audience

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- This course is intended for users who need to access the PDM Essentials system to view information; check in, check out, or view Creo CAD data; perform system tasks; or use product information when making business decisions
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## Agenda

### Day 1

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Module	1	Introduction to the Windchill Environment
Module	2	Locating Information
Module	3	Viewing Information
Module	4	Introduction to Visualization
Module	5	Creating and Managing Documents
Module	6	Windchill MCAD Data Management Process Overview

### Day 2

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Module	7	Manage Design Data
Module	8	Manage Design Development
Module	9	Manage CAD Data
Module	10	Working With CAD Data
Module	11	Manage Family Tables
Module	12	Managing Your Work
Module	13	Participating in Processes

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## Course Content

### Module 1. Introduction to the Windchill Environment

- i. Pro/INTRALINK
- ii. Introduction to the Windchill Environment
- iii. Data Management 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 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
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- 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

#### *Knowledge Check Questions*

### **Module 4. Introduction to Visualization**

- i. Identifying Visualization Concepts
  - ii. Identifying Visualized Intellectual Property Types
  - iii. Generating Creo View Viewables
  - iv. Identifying Readable Visualization Object Types
  - v. Understanding Creo View's Basic Capabilities
  - vi. Understanding the Creo View User Interface
  - vii. Viewing Area User Interface
  - viii. Understanding the Ribbon
  - ix. The Creo View File Menu User Interface
  - x. Quick Access Toolbar User Interface
  - xi. Primary Panel User Interface
  - xii. Understanding the Upper Data Panel
  - xiii. Understanding the Lower Data Panel
  - xiv. Starting Creo View from Windchill
  - xv. Loading Viewables
  - xvi. Opening Non-Model Files with Creo View
  - xvii. Viewing Drawings
  - xviii. Viewing Images
  - xix. Marking Up Creo View Viewables
  - xx. Adding Annotation Objects
  - xxi. Notes and Reference Note Annotations
  - xxii. Leader Line Annotations
  - xxiii. Shape Annotations
  - xxiv. Freehand Annotations
  - xxv. GTOL Annotations
  - xxvi. Stamp Annotations
  - xxvii. Measuring Lengths
  - xxviii. Measuring Distances
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- xxix. Measuring Angles
- xxx. Measuring Diameter or Radius
- xxxi. Measuring Area
- xxxii. Measuring Mass Properties
- xxxiii. Taking a Measurement Summary
- xxxiv. Taking an Envelope Measurement

*Knowledge Check Questions*

**Module 5. Creating and Managing Documents**

- i. Capabilities of a Document
- 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. Modifying Documents
- x. Modifying Documents - Check Out
- xi. Modifying Documents - Edit
- xii. Modifying Documents - Check In
- xiii. Modifying Documents - Undo Checkout
- xiv. Modifying Documents - Replace Content
- xv. Modifying Documents - Revise
- xvi. Understanding Document Relationships
- xvii. Establishing Document References Relationships

*Knowledge Check Questions*

**Module 6. Windchill MCAD Data Management Process Overview**

- i. CAD Data Management Process Overview
  - ii. CAD and Windchill Connectivity
  - iii. Introduction to CAD Documents
  - 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
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- xiv. Workspace Layout
- xv. Changing the Active Workspace
- xvi. Working with Workspaces
- xvii. Working in Large Workspaces
- xviii. Deleting Workspaces
- xix. Sharing Creo Parametric Designs
- xx. Viewing CAD Document Information
- xxi. Viewing CAD Document Content
- xxii. Understanding the Workspace Architecture
- xxiii. Understanding the Save, Upload, and Check In Actions
- xxiv. Understanding Web Browser Access to the Workspace
- xxv. Understanding Workspace Objects
- xxvi. Managing Dependencies and Links

#### *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. Naming a New Creo Parametric Model
  - viii. Naming and Numbering Design Documents
  - ix. Creating CAD Models
  - x. Using CAD Templates in New Designs
  - xi. Initiating New Designs Using New CAD Document
  - xii. Importing CAD Data to Workspace
  - xiii. Exporting CAD Data from Workspace
  - xiv. Set Parameter Values
  - xv. Setting the CAD Document Storage Location
  - xvi. Typical CAD Data Management Conflicts
  - xvii. Regeneration Failures
  - xviii. Incomplete Objects
  - xix. Sample Creo Parametric Dependencies
  - xx. Resolving Incomplete Objects from the Information Page
  - xxi. Resolving Incomplete Objects During Check In
  - xxii. Understanding Check In
  - xxiii. Understanding the Check In Options
  - xxiv. Generating Viewables
  - xxv. Creating Representations
  - xxvi. Monitoring Publish Jobs
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*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. Exposing PDM Information Using Creo Parametric File Open
- vii. Exposing PDM Information in the Model Tree
- viii. Viewing Dependency Information in Windchill
- ix. Add to Workspace
- x. Other Methods of Adding to Workspace
- xi. Checking Out CAD Documents
- xii. Dependency Processing
- xiii. Workspace Status
- xiv. Downloading Non-Latest Configurations
- xv. Removing CAD Documents from the Workspace
- xvi. Saved Filters in Add to Workspace
- xvii. Make Necessary Changes
- xviii. Understanding Download and Check Out
- xix. Understanding Check Out Status and Options
- xx. Modification Process - Check Out a CAD Document
- xxi. Modification Process - Modify a CAD Document
- xxii. Modification Process - Check In a CAD Document
- xxiii. Using Workspace Save As to Create New Designs
- xxiv. Check for Updates
- xxv. Updating and Synchronizing Workspace Objects
- xxvi. Updating CAD Documents in the Workspace
- xxvii. Synchronizing Objects in the Workspace
- xxviii. Data Organization - Manage Conflicts - Check In
- xxix. Comparing Design Data Versions
- xxx. Initiating the Release Process
- xxxi. Creating a Promotion Request

*Knowledge Check Questions***Module 9. Manage CAD Data**

- i. Using Library Parts in Assemblies
  - ii. Locking CAD Documents in the Workspace
  - iii. Modifying CAD Document Attributes
  - iv. Canceling Modifications
  - v. Renaming CAD Documents
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- vi. Moving Design Documents
- vii. Revising Design Documents
- viii. Revising from the Non-Latest Version
- ix. Revise and Check Out Action

*Knowledge Check Questions*

**Module 10. Working With CAD Data**

- i. Understanding PTC Creo Design Exploration Extension (DEX)
- ii. Introduction to Workspace Frames
- iii. Accessing Workspace Frames
- iv. Workspace Frames Details
- v. Retrieving Simplified Representations On-the-Fly
- vi. Using External Simplified Representations
- vii. Using Flexible Components
- viii. Managing Secondary Content Files with Windchill
- ix. Using Creo Parametric to Compare PDM Model Versions
- x. Hyperlinks within a Drawing

*Knowledge Check Questions*

**Module 11. Manage Family Tables**

- i. Family Table Overview
- ii. Viewing Family Table Information
- iii. Creating Family Tables
- iv. Managing Family Tables
- v. Generic Modification Matrix
- vi. Individual Instance Modification Matrix
- vii. Modifying Family Tables
- viii. Modify Instance Parameters/Attributes in a Workspace
- ix. Saving Family Table Items As New Items

*Knowledge Check Questions*

**Module 12. 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
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- 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 13. 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*



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