Introduction to PTC Pro/INTRALINK 11.0

Overview

Course Code: TRN-4757-T
Course Length: 16 Hours

In this course, you will learn how to complete basic functions to navigate and view information within Pro/INTRALINK. You will discover how to access and navigate the Pro/INTRALINK environment, view product information, use Pro/INTRALINK's visualization tools, manage assigned tasks, and perform basic work management functions. Additionally, you will be taught the key capabilities and features of Pro/INTRALINK CAD Data Management and how to use Pro/INTRALINK 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 Pro/INTRALINK 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 11.0 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

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

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

Audience

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

## Day 1

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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
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
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. 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. Overview of 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
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
   vi. Changing the Workspace Table View
   vii. Customizing Workspace Table Views
   viii. Naming a New Creo Parametric Model
   ix. Naming and Numbering Design Documents
   x. Naming and Numbering Policy Example
   xi. Creating CAD Models
   xii. Using CAD Templates in New Designs
   xiii. Initiating New Designs Using New CAD Document
   xiv. Importing CAD Data to Workspace
   xv. Exporting CAD Data From Workspace
   xvi. Parameter to Attribute Mapping
   xvii. Set Parameter Values
   xviii. Setting the CAD Document Storage Location
   xix. Typical CAD Data Management Conflicts
   xx. Regeneration Failures
   xxi. Incomplete Objects
   xxii. Sample Creo Parametric Dependencies
   xxiii. Resolving Incomplete Objects From the Information Page
   xxiv. Resolving Incomplete Objects During Check In
   xxv. Understanding Check In
   xxvi. Understanding the Check In Options
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. Make Necessary Changes

xvii. Understanding Download and Check Out

xviii. Understanding Check Out Status and Options

xix. Modification Process – Check Out a CAD Document

xx. Modification Process – Modify a CAD Document

xxi. Modification Process – Check In a CAD Document

xxii. Using Workspace Save As to Create New Designs

xxiii. Check for Updates

xxiv. Updating and Synchronizing Workspace Objects

xxv. Updating CAD Documents in the Workspace

xxvi. Synchronizing Objects in the Workspace

xxvii. Data Organization - Manage Conflicts - Check In

xxviii. Comparing Design Data Versions

xxix. Initiating the Release Process

xxx. Creating a Promotion Request

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  
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
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