

Introduction to Windchill PDMLink 10.1 for Heavy Users

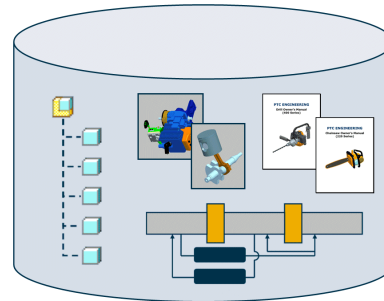
Overview

Course Code	TRN-3806-T
Course Length	2 Days

In this course, you will learn how to complete the day-to-day functions that enable you to create and manage product information with Windchill PDMLink. You will learn how to access and navigate the Windchill PDMLink environment, use Windchill PDMLink's visualization tools, manage product structures, and manage product information changes. Other topics include how to use Windchill PDMLink's communication and collaboration tools, and access user support functions and information.

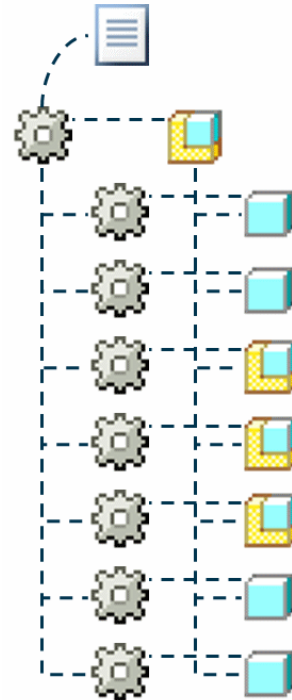
This course is designed for users who need to access the Windchill PDMLink system to view, create, and manage product information. For users who require CAD data management training, this course should be followed with the appropriate CAD data management course for the user's design tool. After completing the course, you will be able to complete Windchill PDMLink data management 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 skills assessment. The questions are used to help reinforce your understanding of the module topics and form the basis for review of any topics, if necessary.



Course Objectives

- Understand the Windchill PDMLink environment and terminology
- Locate and view product information
- View information using Creo View Lite
- Understand the principles of product structure management
- Create and manage product structures
- Create and manage documents
- Understand the Windchill PDMLink change process
- Initiate and implement product change
- Use Windchill PDMLink tools to manage your work



Prerequisites

- Basic browser and Web navigation skills
- Basic understanding of product management processes and deliverables

Audience

- This course is designed for users who need to access the Windchill PDMLink system to view, create, and manage product information.

Agenda

Day 1

Module	1	Introduction to the Environment
Module	2	Locating and Viewing Information
Module	3	Viewing Information using Creo Elements/View Lite
Module	4	Introduction to Product Structure Management
Module	5	Creating Product Structures
Module	6	Managing Product Structures

Day 2

Module	7	Managing Structure Filters
Module	8	Managing Parts in Product Structure Explorer
Module	9	Creating and Managing Documents
Module	10	Introduction to the Change Process
Module	11	Initiating and Implementing Change
Module	12	Managing Your Work

Course Content

Module 1. Introduction to the Environment

- i. Windchill PDMLink
- ii. 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 User Interface
- xii. Using the Home Page
- xiii. Using Quick Links
- xiv. Using the Navigator
- xv. Navigating Products and Libraries
- xvi. Navigating Changes

Knowledge Check Questions

Module 2. Locating and Viewing Information

- i. Locating Information
- ii. Using Simple Search
- iii. Using Advanced Search
- iv. Managing Searches
- v. Browsing
- vi. Using Windchill Tables
- vii. Working with Table Columns
- viii. Managing Windchill Table Views
- ix. Understanding Information Pages
- x. Viewing Structure
- xi. Understanding Object Capabilities
- xii. Document Capabilities
- xiii. CAD Document Capabilities
- xiv. Part and End Item Capabilities
- xv. Relationship Explorer

Knowledge Check Questions

Module 3. Viewing Information using Creo Elements/View Lite

- i. Identifying Visualization Concepts
 - ii. Identifying Visualized Intellectual Property Types
 - iii. Identifying Components in PTC's Visualization System
 - iv. Identifying Readable Visualization Object Types
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- 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 as a Standalone Client
- xv. Starting Creo View from Windchill
- xvi. Loading Viewables
- xvii. Visualizing and Interrogating a Creo View Model
- xviii. Views Group
- xix. Orienting the Model
- xx. Changing the Display of the Model
- xxi. Rendering Options
- xxii. Filtering Display and Other Items
- xxiii. Hiding and Unhiding Components
- xxiv. Opening Non-Model Files with Creo View
- xxv. Viewing Drawings
- xxvi. Viewing Images
- xxvii. Orienting Drawings and Images
- xxviii. Marking Up Creo View Viewables
- xxix. Adding Annotation Objects
- xxx. Notes and Reference Note Annotations
- xxxi. Leader Line Annotations
- xxxii. Shape Annotations
- xxxiii. Freehand Annotations
- xxxiv. GTOL Annotations
- xxxv. Stamp Annotations

Knowledge Check Questions

Module 4. Introduction to Product Structure Management

- i. Defining Configuration Management
 - ii. End Items and Parts in Product Structures
 - iii. CAD Documents in Product Structures
 - iv. Documents in Product Structures
 - v. Creating Product Structures using CAD-centric Approach
 - vi. Creating Product Structures using Part-centric Approach
 - vii. Part Master and Version
 - viii. End Item Master and Version
 - ix. Part Information Page
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- x. The Product Structure Browser
- xi. The Part Structure Command Ribbon
- xii. The Part Structure Panes
- xiii. Product Structure Browser — Layout Options
- xiv. Finding Components in the Product Structure
- xv. Product Structure Browser — Visualization Tab
- xvi. Product Structure Browser — Uses Tab
- xvii. Product Structure Browser — Occurrences Tab
- xviii. Show/Hide Related Information
- xix. Product Structure Related Objects
- xx. Exploring Product Structures

Knowledge Check Questions

Module 5. Creating Product Structures

- i. Creating Parts and End Items
- ii. Creating Multiple Parts
- iii. Building Product Structures
- iv. Associating Windchill Parts with Documents
- v. Converting Windchill Parts into End Items

Knowledge Check Questions

Module 6. Managing Product Structures

- i. Characteristics of Managed Baselines
- ii. Adding Parts to Baselines
- iii. Creating New View Versions
- iv. Bill of Materials Notes
- v. Creating Bill of Materials Notes
- vi. Creating BOM Notes from Templates
- vii. Replacement Parts
- viii. Adding a Reference Designator
- ix. Multi-valued Attribute Support
- x. Object Effectivity
- xi. Setting Date Effectivity
- xii. Product Structure Reports
- xiii. Exporting Bill of Materials
- xiv. Exporting the Product Structure to a File

Knowledge Check Questions

Module 7. Managing Structure Filters

- i. Setting the Latest Filter
 - ii. Setting the Baseline Filter
 - iii. Setting the Attribute Filter
 - iv. Setting the Spatial Filter
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- v. Saving and Managing Filters
- vi. Comparing Product Structures
- vii. Analyzing Structure Comparison
- viii. Comparing Part Information

Knowledge Check Questions

Module 8. Managing Parts in Product Structure Explorer

- i. The Product Structure Explorer (PSE)
- ii. Product Structure Explorer Menus
- iii. About Product Structure Explorer Modes
- iv. Product Structure Explorer Draft Mode
- v. Product Structure Explorer Edit Mode
- vi. Creating Parts and End Items in Product Structure Explorer
- vii. Editing Product Structure Filters
- viii. Annotating Product Structure
- ix. Organizing Queries in Product Structure Explorer

Knowledge Check Questions

Module 9. Creating and Managing Documents

- i. Document Capabilities
- ii. Creating Documents and Links
- iii. New Document: Set Attributes (Type and Template)
- iv. New Document: Set Attributes (Primary Content)
- v. New Document: Set Attributes (Attributes)
- vi. New Document: Set Attachments
- vii. New Multiple Documents
- viii. Overview of Modifying Documents
- ix. Modifying Documents: Check Out
- x. Modifying Documents: Edit
- xi. Modifying Documents: Check In
- xii. Modifying Documents: Undo Checkout
- xiii. Modifying Documents: Replace Content
- xiv. Modifying Documents: Revise
- xv. Understanding Document Relationships
- xvi. Establishing Document References Relationships
- xvii. Associating Documents with Windchill Parts

Knowledge Check Questions

Module 10. Introduction to the Change Process

- i. Change Management Features: Introduction
 - ii. Change Management Features: How Does Change Management Fit In?
 - iii. Change Management Process Definition
 - iv. Change Objects
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- v. Roles in the Change Process
- vi. Change Notice without a Change Request
- vii. Monitoring Change: Reports
- viii. The Change Process: Overview
- ix. The Change Process: Diagram
- x. The Change Process: Problem Report
- xi. The Change Process: Change Request
- xii. The Change Process: Change Request Tracking
- xiii. The Change Process: Change Notice
- xiv. The Change Process: Change Notice Implementation
- xv. Business Case for the Change
- xvi. Creating Problem Reports
- xvii. Creating Problem Reports: Set Attributes
- xviii. Creating Problem Reports: Select Affected End Items
- xix. Creating Problem Reports: Select Affected Objects
- xx. Creating Problem Reports: Set Attachments

Knowledge Check Questions

Module 11. Initiating and Implementing Change

- i. Analyzing Problem Reports: The Process
 - ii. Analyzing Problem Reports: Task Details
 - iii. Change Requests: Objectives and Benefits
 - iv. Creating Change Requests: The Process
 - v. Creating Change Requests: Set Attributes
 - vi. Creating Change Requests: Select Affected End Items
 - vii. Creating Change Requests: Select Affected Objects
 - viii. Creating Change Requests: Collect Affected Objects
 - ix. Creating Change Requests: Set Attachments
 - x. Creating Change Requests: Associate Changes
 - xi. Analyzing Change Requests: The Process
 - xii. Analyzing Change Requests: Fast Track Versus Full Track
 - xiii. Analyzing Change Requests: Task Details
 - xiv. Benefits of Change Notices
 - xv. Creating Change Notices: The Process
 - xvi. Creating Change Notices: Set Attributes
 - xvii. Creating Change Notices: Define Implementation Plan
 - xviii. Creating Change Notices: Set Attachments
 - xix. Creating Change Notices: Associate Changes
 - xx. Editing Change Tasks: Set Attributes
 - xxi. Editing Change Tasks: Select Affected/Resulting Objects
 - xxii. Viewing Related Tasks
 - xxiii. Change Tasks: Details
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- xxiv. Change Task Sequencing
- xxv. Setting the Disposition of the Affected Objects
- xxvi. Setting Effectivity
- xxvii. Change Notice Plan Approval
- xxviii. Change Notice Process: The Diagram
- xxix. Change Notice Plan Execution
- xxx. Mass Change
- xxxi. Change Notice Audit
- xxxii. Windchill Variance: The Diagram
- xxxiii. Windchill Variance: Types

Knowledge Check Questions

Module 12. Managing Your Work

- i. Managing Your Work
 - ii. Managing Tasks
 - iii. Managing Recently Modified Objects
 - iv. Managing Checked Out Objects
 - v. Managing Subscriptions
 - vi. Creating Subscriptions
 - vii. Introduction to Communication Mechanisms
 - viii. Holding Discussions
 - ix. Generating Reports
 - x. Promotion Requests
 - xi. Viewing Promotion Requests
 - xii. Creating Promotion Requests
 - xiii. Participating in Processes
 - xiv. Completing Tasks
 - xv. Completing Promotion Tasks
 - xvi. Viewing Processes
 - xvii. Reassigning Workflow Tasks
 - xviii. Preference Manager
 - xix. Deleting Objects
 - xx. The Save As Feature
 - xxi. The Rename Feature
 - xxii. Using the Windchill Clipboard
 - xxiii. Managing Folders
 - xxiv. Software Downloads
 - xxv. Windchill Packages Definition
 - xxvi. Package Roles
 - xxvii. Packages Table
 - xxviii. Viewing a Package
 - xxix. Managed Collection
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xxx. Creating Managed Collections
Knowledge Check Questions