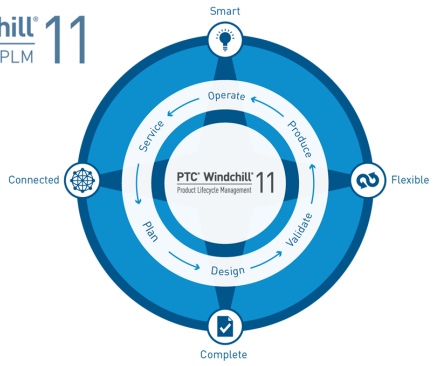
ptc university

Introduction to PTC Windchill PDMLink 11.0 for the Implementation Team

Overview

Course Code	TRN-4752-T
Course Length	16 Hours



In this course, you will learn how to complete basic Windchill PDMLink functions. You will learn how to access and navigate the Windchill PDMLink environment, use Windchill PDMLink's visualization tools, manage CAD and product information, 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.

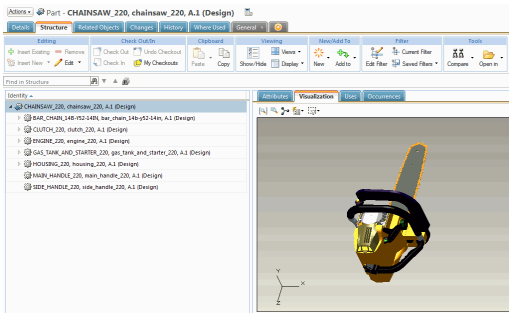
This course is designed to provide broad and basic coverage of Windchill PDMLink functionality to members of the Implementation Team. After completing the course, you will have a comprehensive understanding of Windchill PDMLink capabilities, which will enable you to contribute to the successful implementation of Windchill PDMLink to meet your company's Product Lifecycle Management goals.

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 / Creo Parametric 3.0 M070.

Course Objectives

- Understand the Windchill PDMLink environment and terminology
- Locate and view product information
- View information using Creo View Lite
- Understand the principles of CAD data management
- Initiate new designs and share design information
- Modify and manage design information
- 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 intended for members of the Implementation Team who require a broad understanding of Windchill PDMLink functionality to successfully implement the system.

Agenda

Day 1

Module	1	Introduction to the Windchill Environment
Module	2	Locating Information
Module	3	Viewing Information
Module	4	Creating and Managing Documents
Module	5	Viewing Information using Creo View Lite
Module	6	Windchill MCAD Data Management Process Overview
Module	7	Manage Design Data
Module	8	Manage Design Development
Module	9	Windchill eBOM Creation Process Overview
Module	10	Create eBOM

Day 2

Module	11	Edit BOM
Module	12	Manage eBOM
Module	13	Generate and Compare BOM Reports
Module	14	Share and Export eBOM
Module	15	Change Management Process Overview
Module	16	Identify Need
Module	17	Investigate Need
Module	18	Change Planning
Module	19	Change Implementation
Module	20	Managing Your Work

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

Knowledge Check Questions

Module 4. 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. Modifying Documents - Check Out
ix. Modifying Documents - Edit
x. Modifying Documents - Check In
xi. Modifying Documents - Undo Checkout
xii. Modifying Documents - Replace Content
xiii. Associating Documents with Windchill Parts

Knowledge Check Questions

Module 5. Viewing Information using Creo View Lite

i. Understanding the Creo View User Interface
ii. Viewing Area User Interface
iii. Understanding the Ribbon
iv. The Creo View File Menu User Interface
v. Quick Access Toolbar User Interface
vi. Primary Panel User Interface
vii. Understanding the Upper Data Panel
viii. Understanding the Lower Data Panel
ix. Starting Creo View from Windchill
x. Loading Viewables
xi. Views Group
xii. Orienting the Model
xiii. Rendering Options
xiv. Viewing Drawings

xv. Working with Pages and Sheets

Knowledge Check Questions

Module 6. Windchill MCAD Data Management Process Overview

i. CAD Data Management Process Overview
ii. Introduction to CAD Documents
iii. Introduction to Windchill Parts
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. Understanding the Workspace Architecture

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. Creating CAD Models
viii. Importing CAD Data to Workspace
ix. Set Parameter Values
x. Setting the CAD Document Storage Location
xi. WTPart CAD Document Links
xii. WTPart CAD Document Links Example
xiii. Understanding Calculated and Content Links
xiv. Associating WTParts with CAD Documents
xv. Automatically Associating WTParts in the Workspace
xvi. Typical CAD Data Management Conflicts
xvii. Incomplete Objects
xviii. Resolving Incomplete Objects From the Information Page
xix. Resolving Incomplete Objects During Check In
xx. Understanding Check In

xxi. Understanding the Check In Options

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. Add to Workspace
vii. Checking Out CAD Documents
viii. Make Necessary Changes
ix. Modification Process – Check Out a CAD Document
x. Modification Process – Modify a CAD Document
xi. Modification Process – Check In a CAD Document
xii. Using Workspace Save As to Create New Designs
xiii. Check for Updates
xiv. Updating and Synchronizing Workspace Objects
xv. Updating CAD Documents in the Workspace
xvi. Data Organization - Manage Conflicts - Check In

Knowledge Check Questions

Module 9. Windchill eBOM Creation Process Overview

i. eBOM Creation Process Overview
ii. Product Structures and BOMs
iii. End Item Parts in Product Structures
iv. CAD Documents in Product Structures
v. Documents in Product Structures
vi. Creating Product Structures using a CAD-centric Approach
vii. Creating Product Structures using a Part-centric Approach
viii. The Product Structure Browser
ix. The PSB Command Ribbon
x. The Part Structure Panes
xi. PSB Occurrences Tab
xii. Finding Components in the Product Structure
xiii. PSB Layout Options
xiv. Product Structure Related Objects
xv. PSB Visualization Tab
xvi. Show Hide Related Information
xvii. PSB Uses Tab

Knowledge Check Questions

Module 10. Create eBOM

i. Create eBOM Process Overview
ii. Create the eBOM Using CAD Auto Associate
iii. Understanding Auto Associate for Creating Product Structures
iv. The Auto Associate Action
v. Create the eBOM Using the PSB
vi. Building Product Structures
vii. Create the eBOM Using Import From Spreadsheet
viii. Create the eBOM Using Save As

Knowledge Check Questions

Module 11. Edit BOM

i. Edit eBOM Process Overview
ii. Use the CAD Tool to Edit the eBOM
iii. Use the PSB to Edit the eBOM
iv. Use a Spreadsheet to Edit the eBOM

Knowledge Check Questions

Module 12. Manage eBOM

i. Manage eBOM Process Overview
ii. Characteristics of Managed Baselines
iii. Adding Objects to Baselines
iv. Manage Life Cycle
v. Usages and Occurrences
vi. Assigning a Reference Designator
vii. Editing Usage Attributes
viii. WTPart and CAD Document Associations
ix. Editing WTPart and CAD Document Associations
x. Associating WTParts with Documents
xi. Managing Structure Filters
xii. Setting the Latest Filter
xiii. Setting the Baseline Filter
xiv. Setting the Effectivity Filter
xv. Setting the Promotion Request Filter
xvi. Setting the Attribute Filter
xvii. Setting the Spatial Filter
xviii. Bill of Materials Notes
xix. Creating Bill of Materials Notes
xx. Creating Bill of Materials Notes from Templates

Knowledge Check Questions

Module 13. Generate and Compare BOM Reports

i. Generate and Compare BOM Reports Overview
ii. Generating BOM Reports

Knowledge Check Questions

Module 14. Share and Export eBOM

i. Share and Export eBOM Overview
ii. Export Using Import–Export
iii. Export Using PSB
iv. Export Using Package
v. Share BOM to Project
vi. Export from Visualization

Knowledge Check Questions

Module 15. Change Management Process Overview

i. Change Management Process Overview
ii. Change Objects
iii. Roles in the Change Process

Knowledge Check Questions

Module 16. Identify Need

i. Identify Need Process Overview
ii. Creating Problem Reports
iii. New Problem Report: Set Attributes
iv. New Problem Report: Select Affected End Items
v. New Problem Report: Select Affected Objects
vi. New Problem Report: Set Attachments
vii. New Problem Report: Select Associations
viii. Analyzing Problem Reports - Task Details

Knowledge Check Questions

Module 17. Investigate Need

i. Investigate Need Process Overview
ii. Creating Change Requests
iii. New Change Request - Set Attributes
iv. New Change Request - Select Affected End Items
v. New Change Request - Select Affected Objects
vi. New Change Request - Set Attachments
vii. New Change Request - Select Associations
viii. Impact Analysis
ix. Effectivity Planning
x. Analyzing Change Requests - Task Details
xi. Investigate Need Full Track Process Overview
xii. Schedule CRB Review - Task Details

Knowledge Check Questions

Module 18. Change Planning

i. Change Planning Process Overview
ii. Creating Change Notices
iii. New Change Notice - Set Attributes
iv. New Change Notice - Define Implementation Plan
v. New Change Task - Set Attributes
vi. New Change Task - Select Affected/Resulting Objects
vii. Setting Effectivity
viii. Setting the Disposition of the Affected Objects
ix. Superseding an Affected Object
x. New Change Notice - Set Attachments
xi. New Change Notice - Select Associations
xii. Change Planning Full Track Process Overview
xiii. Change Implementation Board Review

Knowledge Check Questions

Module 19. Change Implementation

i. Change Implementation Process Overview
ii. Implementing Change
iii. Reviewing Implementation Results
iv. Review and Audit Change - Process Overview
v. Auditing Change Notice
vi. Reviewing Business Rule Conflicts
vii. Executing Ad Hoc Modifications
viii. Completing the Change Process

Knowledge Check Questions

Module 20. Managing Your Work

i. Managing Your Work
ii. Participating in Processes
iii. Completing Tasks
iv. Viewing Processes
v. Promotion Requests
vi. Viewing Promotion Requests
vii. Completing Promotion Tasks
viii. Introduction to Communication Mechanisms
ix. Managing Subscriptions
x. Holding Discussions
xi. Preference Manager
xii. Using the Windchill Clipboard
xiii. Managing Folders
xiv. Software Downloads

Knowledge Check Questions