

Introduction to PTC Windchill PDMLink 11.0 for Light Users

Overview

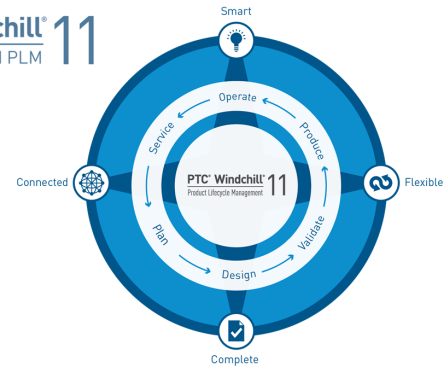
Course Code	TRN-4750-T
Course Length	8 Hours

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.

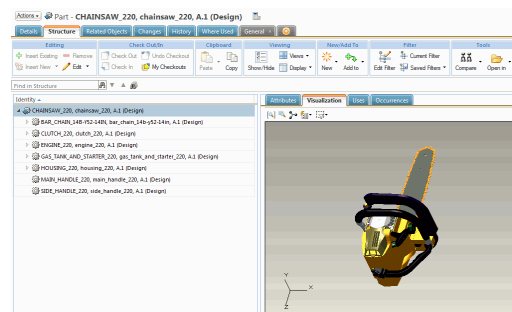
This course has been developed using Windchill 11.0 F000 / Creo Parametric 3.0 M070.

PTC® Windchill® 11
Smart Connected PLM



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.
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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

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

Module 3. Viewing Information

- i. Using Windchill Tables
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- 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

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

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

- i. Opening Non-Model Files with Creo View
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- 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

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
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xvii. Software Downloads

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
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