

# Introduction to PTC Windchill PDMLink 11.0 for Heavy Users

## Overview

Course Code TRN-4751-T

Course Length 16 Hours

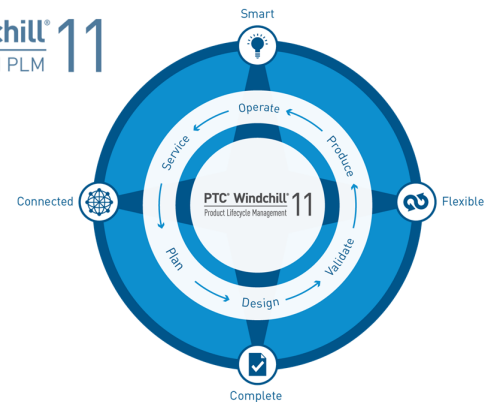
In this course, you will learn how to complete the day-to-day functions that enable you to create and manage product information with Windchill PDMLink. You will learn how to access and navigate the Windchill PDMLink environment, use Windchill PDMLink's visualization tools, manage product structures,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

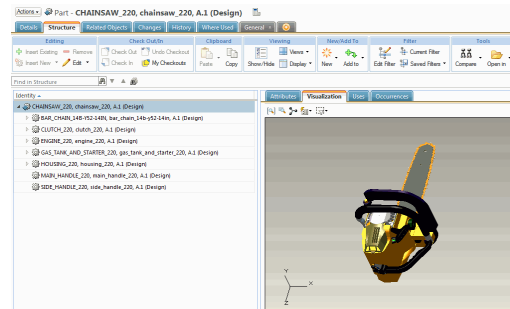
This course has been developed using Windchill 11.0 F000 / Creo Parametric 3.0 M070.

PTC® Windchill® 11  
Smart Connected PLM



## Course Objectives

- Understand the Windchill PDMLink environment and terminology
- Locate 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 intended 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 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 eBOM Creation Process Overview
Module	7	Create eBOM
Module	8	Edit BOM
Module	9	Manage eBOM

### Day 2

---

Module	10	Generate and Compare BOM Reports
Module	11	Share and Export eBOM
Module	12	Change Management Process Overview
Module	13	Identify Need
Module	14	Investigate Need
Module	15	Change Planning
Module	16	Change Implementation
Module	17	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

### 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
-

- 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

#### **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

#### **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

### **Module 6. Windchill eBOM Creation Process Overview**

- i. eBOM Creation Process Overview
- ii. Product Structures and BOMs
- iii. End Item WTParts 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

### **Module 7. 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

### **Module 8. 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

### **Module 9. 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

#### **Module 10. Generate and Compare BOM Reports**

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

#### **Module 11. 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

#### **Module 12. Change Management Process Overview**

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

#### **Module 13. 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

#### **Module 14. 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

#### **Module 15. 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

#### **Module 16. 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

**Module 17. 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
-