

Introduction to PTC Windchill ProjectLink 11.0

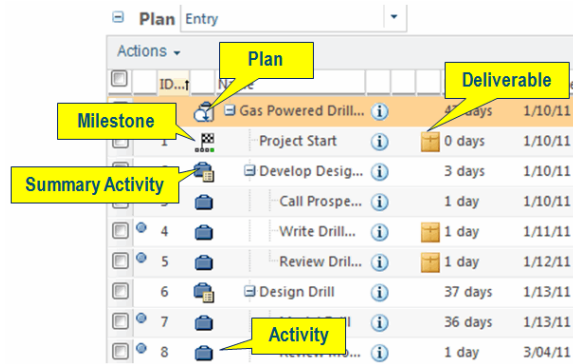
Overview

Course Code	TRN-4756-T
Course Length	8 Hours

In this course, you will learn how to participate in and manage projects using Windchill ProjectLink 11.0. Emphasis will be placed on learning how to access and navigate the Windchill ProjectLink interface, including navigating and using your personal environment, the project environment, and project storage. You will also learn how to manage document information, the project plan, and assigned tasks. You will gain an understanding of creating and managing projects, which includes planning activities and milestones, assigning the project team, and setting up the folder storage structure. Finally, you will learn how to communicate with other team members using the collaboration tools of Windchill ProjectLink.

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.



Course Objectives

- Access Windchill Help
- Browse and search for Windchill objects
- View the attributes, content, and relationships of Windchill objects
- Identify the project manager's role
- Plan projects, project resources, and project storage
- Identify the differences between projects and programs
- Create projects in Windchill, including the plan objects required to support them
- Design an action item
- Create and manage project storage and access controls



- Modify and create documents
- View Windchill objects in Creo View
- Manage your Windchill notebook
- Create and manage subscriptions
- Complete Windchill assignments
- Reassign assignments to other team members
- Update the project status
- Monitor the project timeline
- Use Microsoft Project in conjunction with Windchill
- Discuss objects in forums
- Manage and schedule meetings

Prerequisites

- None

Audience

- This course is intended for project participants and project managers using the ProjectLink application. 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	Introduction to Project Management
Module	3	Locating and Viewing Information
Module	4	Creating Documents and Links
Module	5	Implementing Projects
Module	6	Introduction to Visualization
Module	7	Modifying and Managing Documents
Module	8	Managing Projects
Module	9	Managing Your Work

Course Content

Module 1. Introduction to the Windchill Environment

- i. Windchill ProjectLink
- ii. Introduction to the Windchill Environment
- iii. Data Management Objects
- iv. Project 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 Projects and Programs
- xvii. Accessing Help

Module 2. Introduction to Project Management

- i. Project Management - Overview
- ii. Project Manager's Responsibilities
- iii. Project Plan Objects
- iv. Planning Projects
- v. Project Components
- vi. Project Plan Views - Plan View
- vii. Project Plan Views - Timeline View
- viii. Project Plan Views - Gantt Explorer
- ix. Planning Project Storage
- x. Planning Project Resources
- xi. Programs - Making Programs Visible
- xii. Programs and Projects - Differences in Design Intent
- xiii. Programs and Projects - Differences in Functionality

Module 3. Locating and Viewing Information

- i. Locating Information
 - ii. Using Simple Search
 - iii. Using Advanced Search
 - iv. Using Advanced Search - Type Section
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- 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. Browsing for Objects
- xiii. Using Mini Information Pages
- xiv. Using Windchill Tables
- xv. Working with Table Columns
- xvi. Understanding Information Pages
- xvii. Viewing Structure
- xviii. Understanding Object Capabilities
- xix. Document Capabilities
- xx. CAD Document Capabilities
- xxi. Part and End Item Capabilities
- xxii. Relationship Explorer

Module 4. Creating Documents and Links

- i. Creating Documents and Links
- ii. New Document: Set Attributes - Type
- iii. New Document: Set Attributes - Template
- iv. New Document: Set Attributes (Primary Content)
- v. No Java Applet for Document Content Upload or Download
- vi. New Document: Set Attributes (Attributes)
- vii. New Document: Set Attachments
- viii. New Multiple Documents
- ix. Creating Links

Module 5. Implementing Projects

- i. Creating a Project
 - ii. Selecting a Project Team
 - iii. Configuring a Project
 - iv. Managing the Project Team
 - v. Managing Resources
 - vi. Starting Projects
 - vii. Project Activities and Summary Activities
 - viii. Creating an Activity - General Attributes
 - ix. Creating an Activity - Schedule Attributes
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- x. Creating an Activity - Advanced Attributes
- xi. Scheduling Attributes
- xii. Creating Multiple Activities
- xiii. Creating a Summary Activity
- xiv. Project Milestone
- xv. Creating a Milestone
- xvi. Project Deliverables
- xvii. Creating a Project Deliverable
- xviii. Action Items
- xix. Resolving an Action Item
- xx. Creating Action Items
- xxi. Classic and Enhanced Projects

Module 6. Introduction to Visualization

- i. Identifying Readable Visualization Object Types
- ii. Understanding Creo View's Basic Capabilities
- iii. Understanding the Creo View User Interface
- iv. Viewing Area User Interface
- v. Understanding the Ribbon
- vi. The Creo View File Menu User Interface
- vii. Quick Access Toolbar User Interface
- viii. Primary Panel User Interface
- ix. Understanding the Upper Data Panel
- x. Understanding the Lower Data Panel
- xi. Starting Creo View from Windchill
- xii. Loading Viewables
- xiii. Opening Non-Model Files with Creo View
- xiv. Viewing Drawings
- xv. Viewing Images
- xvi. Orienting Drawings and Images
- xvii. Working with Pages and Sheets

Module 7. Modifying and Managing Documents

- i. Overview of Modifying Documents
 - ii. Modifying Documents - Check Out
 - iii. Modifying Documents - Edit
 - iv. Modifying Documents - Check In
 - v. Modifying Documents - Undo Checkout
 - vi. Modifying Documents - Replace Content
 - vii. Associating Documents with Windchill Parts
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Module 8. Managing Projects

- i. Managing Projects
- ii. Project Status
- iii. Project State
- iv. Editing Plan Objects from Windchill Tables
- v. Edit Plan Object Wizard
- vi. Track Work Wizard
- vii. Adding Objects to the Timeline
- viii. Exporting Projects
- ix. Microsoft Project Plug-In
- x. Managing Projects using MS Project
- xi. Importing, Exporting, and Syncing Plans with Microsoft Project

Module 9. 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
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