

Update to Windchill PDMLink 10.0 from Windchill PDMLink 9.0/9.1

Overview

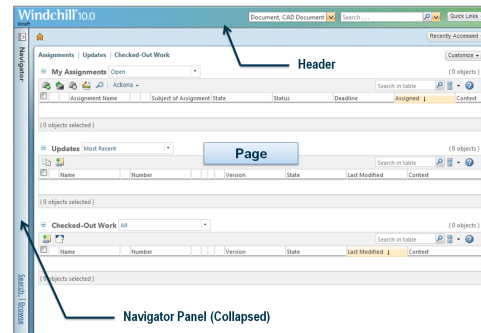
Course Code TRN-3141-T

Course Length 1 Day

This course is designed for users who need to update their Windchill knowledge and skills from Windchill PDMLink 9.0 or 9.1 to work in a Windchill PDMLink 10.0 environment. After completing the course, you will be able to identify and use new Windchill PDMLink features and perform common tasks and activities available in Windchill PDMLink 9.0 or 9.1 using the new Windchill PDMLink 10.0 interface.

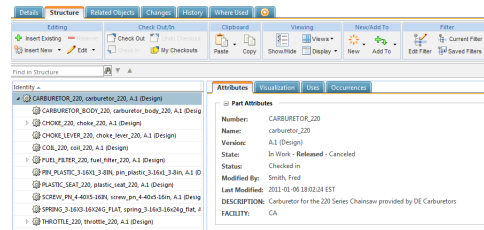
In this course, you will learn about the feature and interface updates to Windchill PDMLink 10.0 from Windchill PDMLink 9.0 and 9.1. You will also learn about general Windchill usability enhancements, new ways to work with Windchill business objects, and specific enhancements for managing documents. Finally, you will learn about changes in how you participate in processes, creating and delivering work packages, and updates to change and configuration management.

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

- Describe the updates to the Windchill user interface including the home page, quick links, and Windchill navigator
- Configure your Windchill environment by customizing your home page, context pages, object information pages, and table columns and views
- Locate information by searching or browsing for Windchill objects and navigating through context page options
- Work with objects by using context actions and enhanced management tools such as multi-object edit, the Windchill clipboard, and event manager
- Manage Windchill documents directly from Microsoft Windows Explorer or Microsoft Office using the latest version of desktop integration
- Use the new create and update interfaces available for working with documents
- Describe enhancements to collaborating with others in the Windchill environment
- Review and manage processes and process history
- Manage and reassign workflow tasks, life cycles, and teams
- Create and manage work packages
- Describe enhancements to Windchill change management including new wizard-based change management forms and being able to use the Windchill collector to quickly find and include related objects in complex dependency operations
- Use the new work items table to manage work being done on changes
- Create and manage variances, including waivers and deviations
- Describe enhancements to the Windchill product structure management, including BOM notes, effectivity processing, and structure filtering and compare
- Explore and use the new Product Structure Browser interface



Prerequisites

- Working knowledge of Windchill PDMLink 9.0 or Windchill PDMLink 9.1

Audience

- This course is designed for users who need to update their Windchill knowledge and skills from Windchill PDMLink 9.0 or 9.1 to work in the Windchill PDMLink 10.0 environment

Agenda

Day 1

Module	1	Windchill Usability Enhancements
Module	2	Working with Objects
Module	3	Document Management Enhancements
Module	4	Collaborating with Others
Module	5	Change Management Enhancements
Module	6	Product Structure Management Enhancements

Course Content

Module 1. Windchill Usability Enhancements

- i. Understanding the New Windchill User Interface
- ii. Using the Home Page
- iii. Using Quick Links
- iv. Accessing Help
- v. Using the Navigator
- vi. Navigating Products and Libraries
- vii. Navigating Changes
- viii. Locating Information
- ix. Using Simple Search
- x. Using Advanced Search
- xi. Managing Searches
- xii. Browsing
- xiii. Using Windchill Tables
- xiv. Using Windchill Tables: Right-Click Actions
- xv. Working with Table Columns
- xvi. Managing Windchill Table Views
- xvii. New View: Set Name
- xviii. New View: Choose Object Types
- xix. New View: Set Filters
- xx. New View: Set Column Display
- xxi. New View: Set Sorting
- xxii. Using the Thumbnail Navigator

Knowledge Check Questions

Module 2. Working with Objects

- i. Understanding Information Pages
- ii. Understanding Information Pages: Common Tabs
- iii. Viewing Structure
- iv. Understanding Information Pages: History Tab
- v. Viewing Timeline History
- vi. Using the Timeline Filter
- vii. Configuring Timeline Options
- viii. Customizing Information Pages
- ix. Editing Multiple Objects
- x. Checking Out Previous Iterations of Objects
- xi. Moving Objects
- xii. Using the Windchill Clipboard
- xiii. Event Manager

Knowledge Check Questions

Module 3. Document Management Enhancements

- i. New Document: Set Attributes (Type and Template)
- ii. New Document: Set Attributes (Primary Content)
- iii. New Document: Set Attributes (Attributes)
- iv. New Document: Set Attachments
- v. New Multiple Documents
- vi. Document Preferences
- vii. Attachment Preferences
- viii. Modifying Documents: Replace Content
- ix. Comparing Document Information
- x. Desktop Integration
- xi. Installing Desktop Integration
- xii. Configuring Desktop Integration
- xiii. Using Desktop Integration: Working in Windows Explorer
- xiv. Using Desktop Integration: File Actions
- xv. Using Desktop Integration: Document Actions
- xvi. Using Desktop Integration: Attribute Actions and Help
- xvii. Closing a Windchill Document in a Microsoft Office Application
- xviii. Simplified Edit Document Using Windchill Desktop Integration
- xix. Using Desktop Integration: Outlook Documents and Meetings

*Knowledge Check Questions***Module 4. Collaborating with Others**

- i. Generating Reports
 - ii. Enhancements to Participating in Processes
 - iii. Workflow Task Information Page
 - iv. Task Assistant
 - v. Reviewing Process History
 - vi. Reassigning Workflow Tasks
 - vii. Reassigning Life Cycles
 - viii. Resetting Teams
 - ix. Viewing Processes
 - x. Managing Processes
 - xi. Windchill Packages Definition
 - xii. Package Roles
 - xiii. Packages Table
 - xiv. Viewing a Package
 - xv. Creating New Packages
 - xvi. Creating New Objects in a Package
 - xvii. Routing a Package
 - xviii. Adding Content to Packages
 - xix. Editing a Package
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- xx. Locking a Package
- xxi. Delivering a Package
- xxii. Receiving a Package
- xxiii. Revising a Package
- xxiv. Deleting a Package
- xxv. Compare Package Versions
- xxvi. Exporting a Package

Knowledge Check Questions

Module 5. Change Management Enhancements

- i. Change Management Usability Improvements
- ii. Mass Change
- iii. Wizard-Based Change Management Forms
- iv. Propagating Change Information
- v. Collecting Affected Objects
- vi. Editing Change Tasks: Set Attributes
- vii. Editing Change Tasks: Select Affected/Resulting Objects
- viii. Change Task Sequencing
- ix. Setting the Disposition of the Affected Objects
- x. Windchill Variance: The Diagram
- xi. Windchill Variance: Types
- xii. Creating Variances: Set Attributes
- xiii. Creating Variances: Define Impact
- xiv. Creating Variances: Select Affected End Items
- xv. Creating Variances: Select Affected Objects
- xvi. Creating Variances: Effectivity
- xvii. Creating Variances: Set Attachments
- xviii. Incorporating Variances
- xix. Monitoring Change: Reports

Knowledge Check Questions

Module 6. Product Structure Management Enhancements

- i. The Product Structure Browser
 - ii. The Part Structure Command Ribbon
 - iii. The Part Structure Panes
 - iv. Product Structure Browser — Layout Options
 - v. Finding Components in the Product Structure
 - vi. Product Structure Browser — Visualization Tab
 - vii. Product Structure Browser — Uses Tab
 - viii. Product Structure Browser — Occurrences Tab
 - ix. Show/Hide Related Information
 - x. Exploring Product Structures
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- xi. Building Product Structures
- xii. Converting Windchill Parts into End Items
- xiii. Enhancements to Managing Product Structures
- xiv. Bill of Materials Notes
- xv. Creating Bill of Materials Notes
- xvi. Creating BOM Notes from Templates
- xvii. Adding a Reference Designator
- xviii. Importing BOM Data from Spreadsheets
- xix. Exporting Bill of Materials
- xx. Filtering Structures
- xxi. Setting the Latest Filter
- xxii. Setting the Baseline Filter
- xxiii. Setting the Effectivity Filter
- xxiv. Setting the Promotion Request Filter
- xxv. Setting the Attribute Filter
- xxvi. Setting the Spatial Filter
- xxvii. Saving and Managing Filters
- xxviii. Comparing Product Structures
- xxix. Analyzing Structure Comparison

Knowledge Check Questions
