Update to Windchill PDMLink 10.0 from Windchill PDMLink 9.0/9.1

Overview
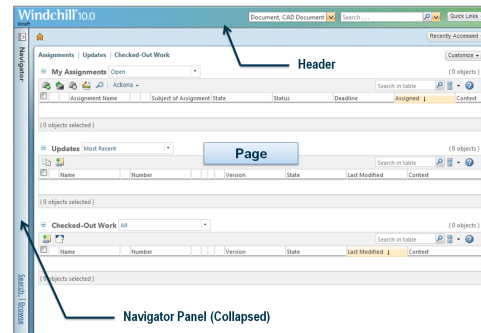
Course Code	TRN-3141-T
Course Length	1 Day

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.
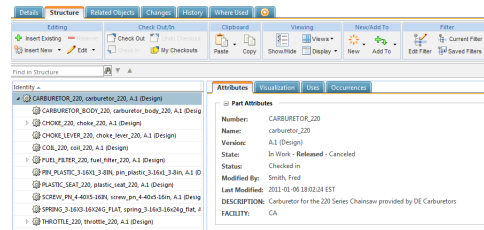
In this course, you will learn about the feature and interface updates to Windchill PDMLink 10.0 from Windchill PDMLink 9.0 and 9.1. You will also learn about general Windchill usability enhancements, new ways to work with Windchill business objects, and specific enhancements for managing documents. 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

Knowledge Check Questions