

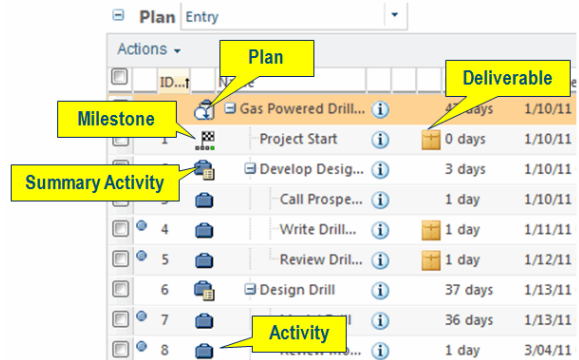
# Introduction to Windchill Projectlink 10.2

## Overview

Course Code	TRN-4270EV
Course Length	1 Day

In this course, you will learn how to participate in and manage projects using Windchill ProjectLink 10.2. 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.



## 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.

## 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. Integrated Windchill PDMLink and Windchill ProjectLink
- ii. Windchill PDMLink
- iii. Windchill ProjectLink
- iv. Pro/INTRALINK
- v. Arbortext Content Manager
- vi. Content Management
- vii. Windchill Environment
- viii. Data Management Objects
- ix. Change Management Objects
- x. Project Management Objects
- xi. Storage Locations
- xii. Iteration and Revision Controls
- xiii. Process Controls
- xiv. Access Controls
- xv. Collaboration Features
- xvi. Logging On to Windchill
- xvii. Understanding the Windchill User Interface
- xviii. Using the Home Page
- xix. Using Quick Links
- xx. Using the Navigator
- xxi. Using the Breadcrumb Trail
- xxii. Navigating Products and Libraries
- xxiii. Navigating Projects and Programs
- xxiv. Navigating Changes
- xxv. Accessing Help

### Module 2. Introduction to Project Management

- i. Project Management – Overview
  - ii. Project Managers 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. Browsing
- v. Using Mini Information Pages
- vi. Using Windchill Tables
- vii. Working with Table Columns
- viii. Understanding Information Pages
- ix. Viewing Structure
- x. Understanding Object Capabilities
- xi. Document Capabilities
- xii. CAD Document Capabilities
- xiii. Part and End Item Capabilities
- xiv. Dynamic Document Capabilities
- xv. Problem Report Capabilities
- xvi. Change Request Capabilities
- xvii. Change Notice Capabilities
- xviii. 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. New Document: Set Attributes (Attributes)
- vi. New Document: Set Attachments
- vii. New Multiple Documents
- viii. 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
- 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. Modifying Documents — Revise
- viii. Associating Documents with Windchill Parts

### **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. Edit in Gantt Explorer
- viii. Adding Objects to the Timeline
- ix. Exporting Projects
- x. Microsoft Project Plug-In
- xi. Managing Projects using MS Project
- xii. 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. Managing Subscriptions
  - v. Creating Subscriptions
  - vi. Preference Manager
  - vii. Setting Attachment Preferences
  - viii. Setting Search Preferences
  - ix. Setting Display Preferences
  - x. Setting Table Preferences
  - xi. Setting Visualization Preferences
  - xii. Using the Windchill Clipboard
  - xiii. Software Downloads
  - xiv. Introduction to Communication Mechanisms
  - xv. E-mailing Team Members
  - xvi. E-mailing a Page
  - xvii. Holding Discussions
-