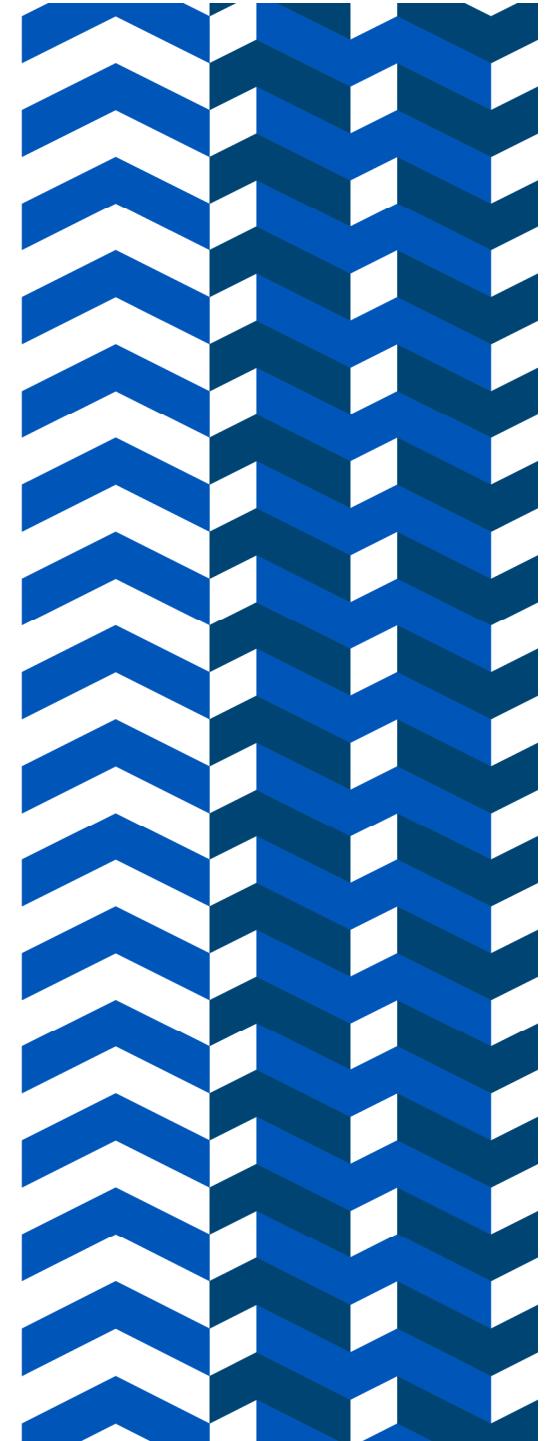


Introduction to Windchill PDMLink 10.0 for Light Users

By: Martin St-Laurent
Date: 01-April-2013
Updated: 14-Dec-2015



Course Objectives



2

- Understand the Windchill PDMLink environment and terminology
- Locate product information
- View product information
- Understand visualization concepts and terminology
- Use Creo Elements/View Lite to view product information
- Use Windchill PDMLink tools to manage your work
- Participate in Windchill PDMLink processes

Agenda



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- Module 1. Introduction to the Windchill Environment
- Module 2. Locating Information
- Module 3. Viewing Information
- Module 4. Introduction to visualization
- Module 5. Managing Your Work
- Module 6. Troubleshoot
- Module 7. Icon Glossary & reference Document Link



Introduction



Introduction

PLM Definition



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Product Data Management (PDM)

serves as a central knowledge repository for product history, and promotes integration and data exchange among all business users who interact with products.

In a single environment

Product Lifecycle Management (PLM)

is the process of managing the entire lifecycle of a product from its conception, through design and manufacture, to service and disposal. PLM integrates people, data, processes and business systems and provides a product information backbone for companies and their extended enterprise.

In a single environment.

Introduction

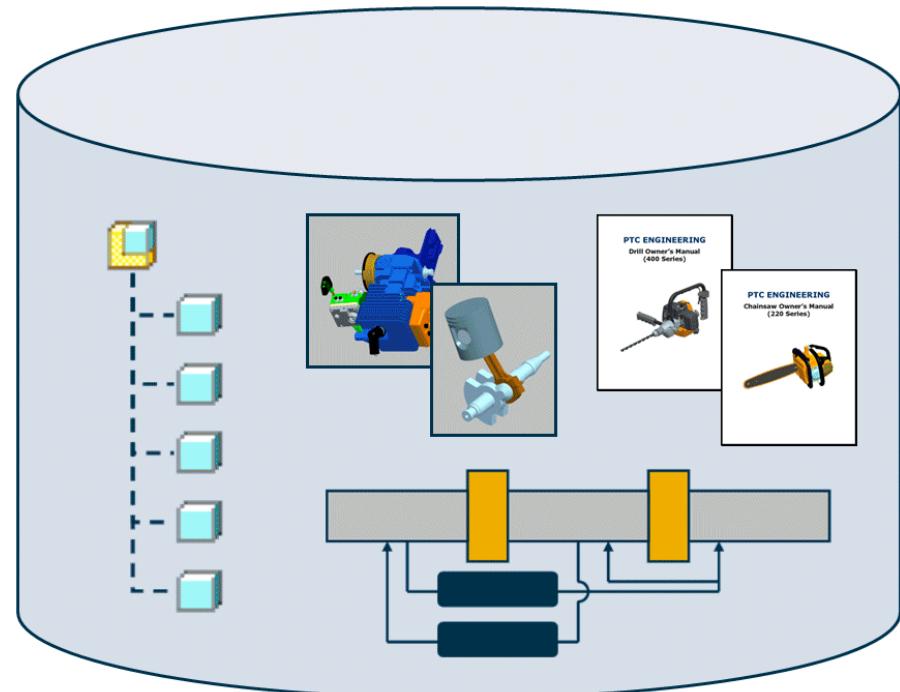
Windchill Environment



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Windchill is a collaborative data management environment.

- Store information.
- Manages information in storage locations.
- Manages information evolution.
- Controls access to information.
- Provides collaboration tools.



Introduction

PLM Data management Objects



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CAD Documents



Documents



Specification and other Word/Excel Document

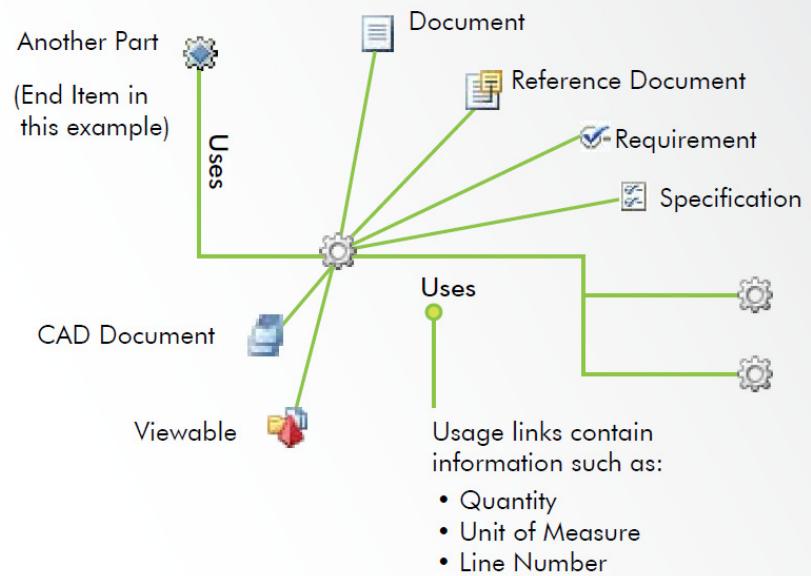
Legacy CAD Documents: (PDF of Old AutoCAD Drawing)



Parts and End Items

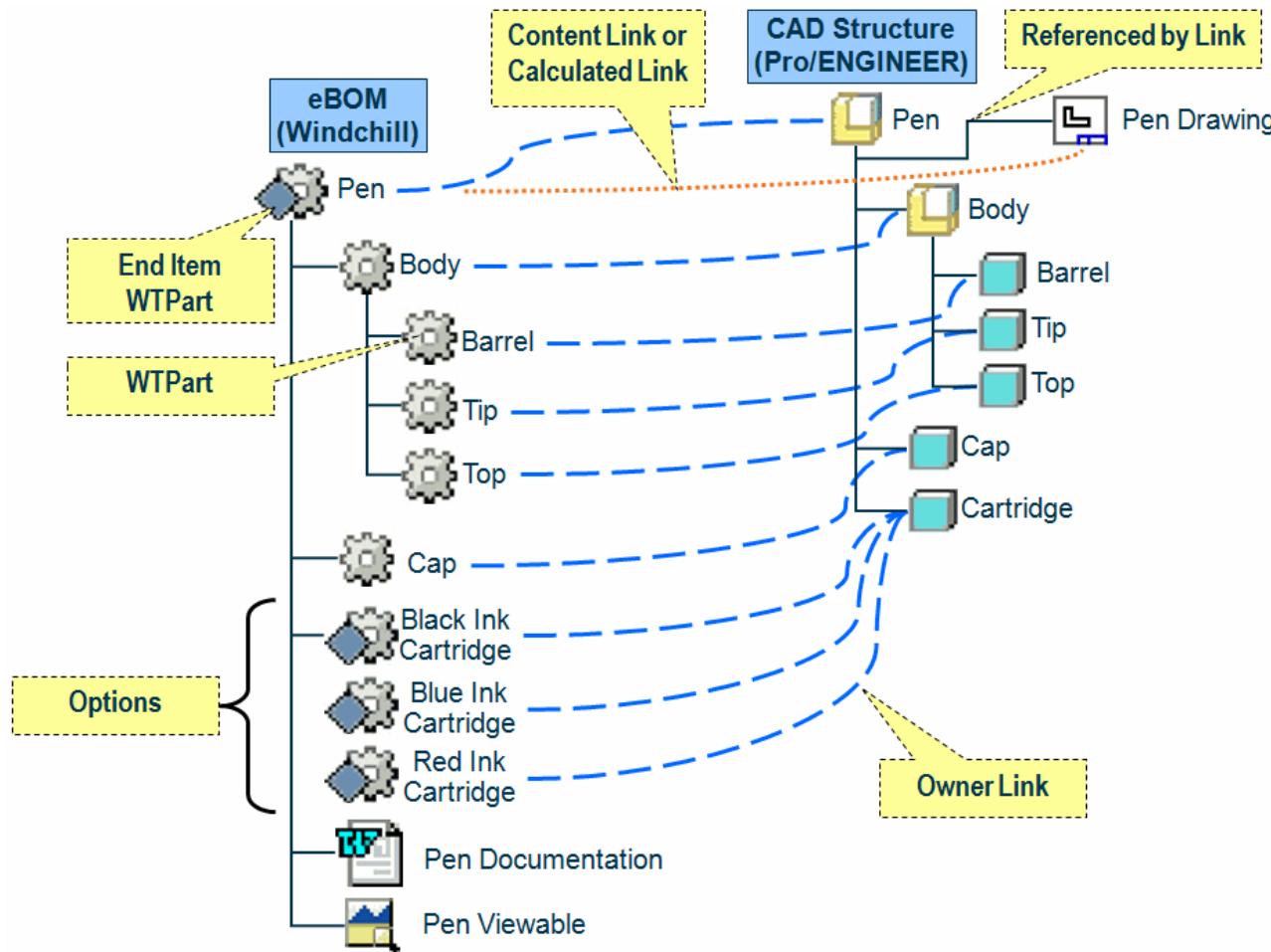


Part Relationship Diagram



Introduction

Windchill Parts

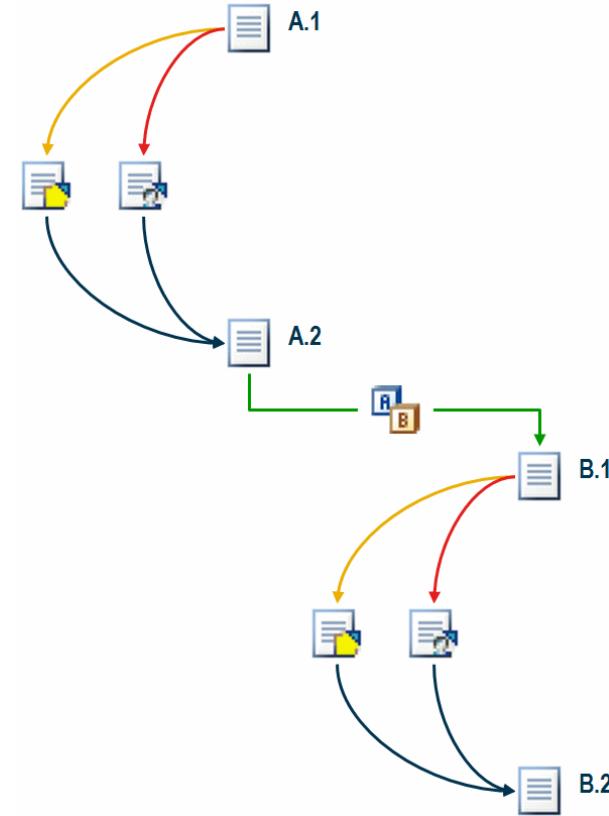
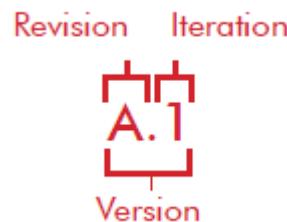


Introduction

Version, Revision and Iteration

When you save an object in Windchill for the first time, you create the first version of it.

In Windchill, all objects are assigned a revision and iteration. Together, the revision and iteration define the object's version. For example, if A.1 is the version, A is the revision and 1 is the iteration



Introduction

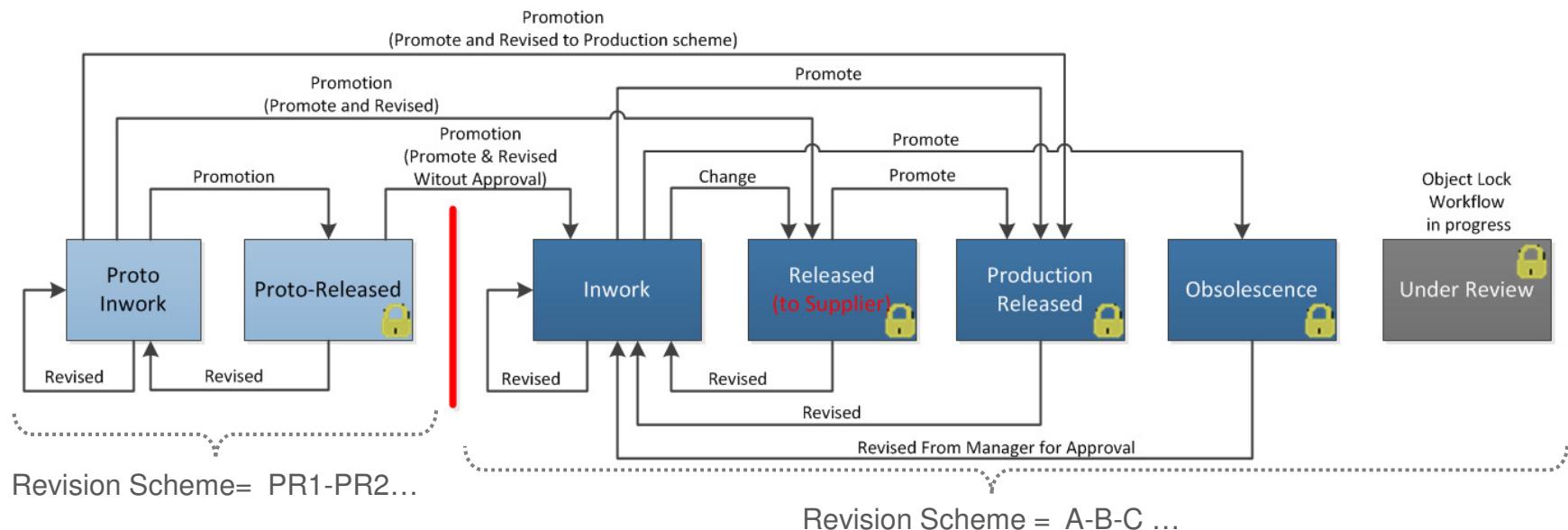
Process Controls & Lifecycle

Automated Process Component Promotion

- Life Cycles
 - Transitions
- Workflows
- Teams

Ex. :

Engineering Drawings Promotion life cycle



Module 1

Module 1. Introduction to the Windchill Environment

Module 2. Locating Information

Module 3. Viewing Information

Module 4. Introduction to visualization

Module 5. Managing Your Work

Module 6. Troubleshoot

Module 7. Icon Glossary & reference Document Link

Module 1. Introduction to the Windchill Environment

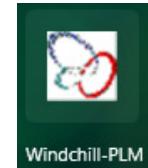
Logging on Windchill



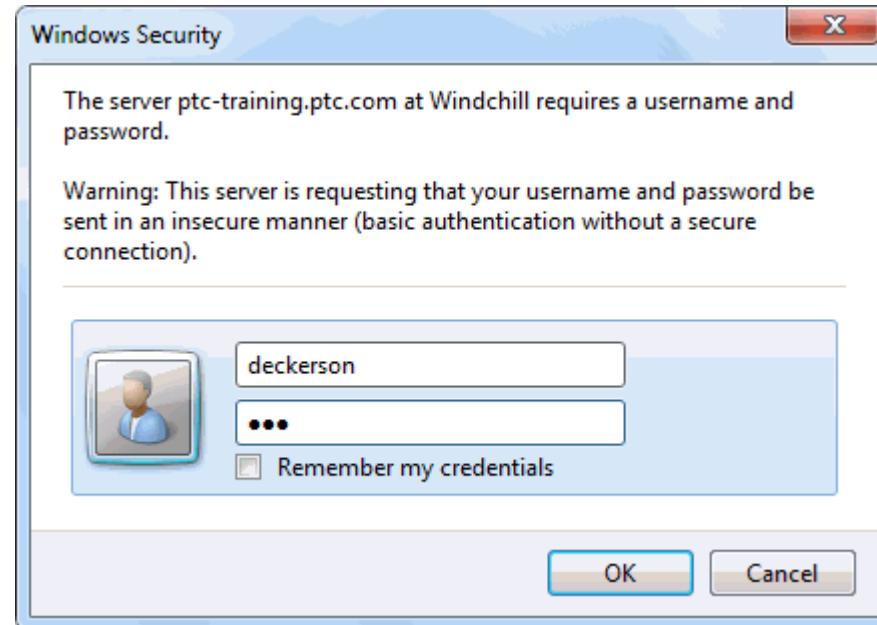
12

Log On process

- Open Windchill PLM on CITRIX Portal
- Type URL : <http://plm-ts.csl.local/Windchill>
- Log On
 - User Name / Password



or on any browser



Caution:

- If you use a local Browser you need to have the Viewer Client install locally

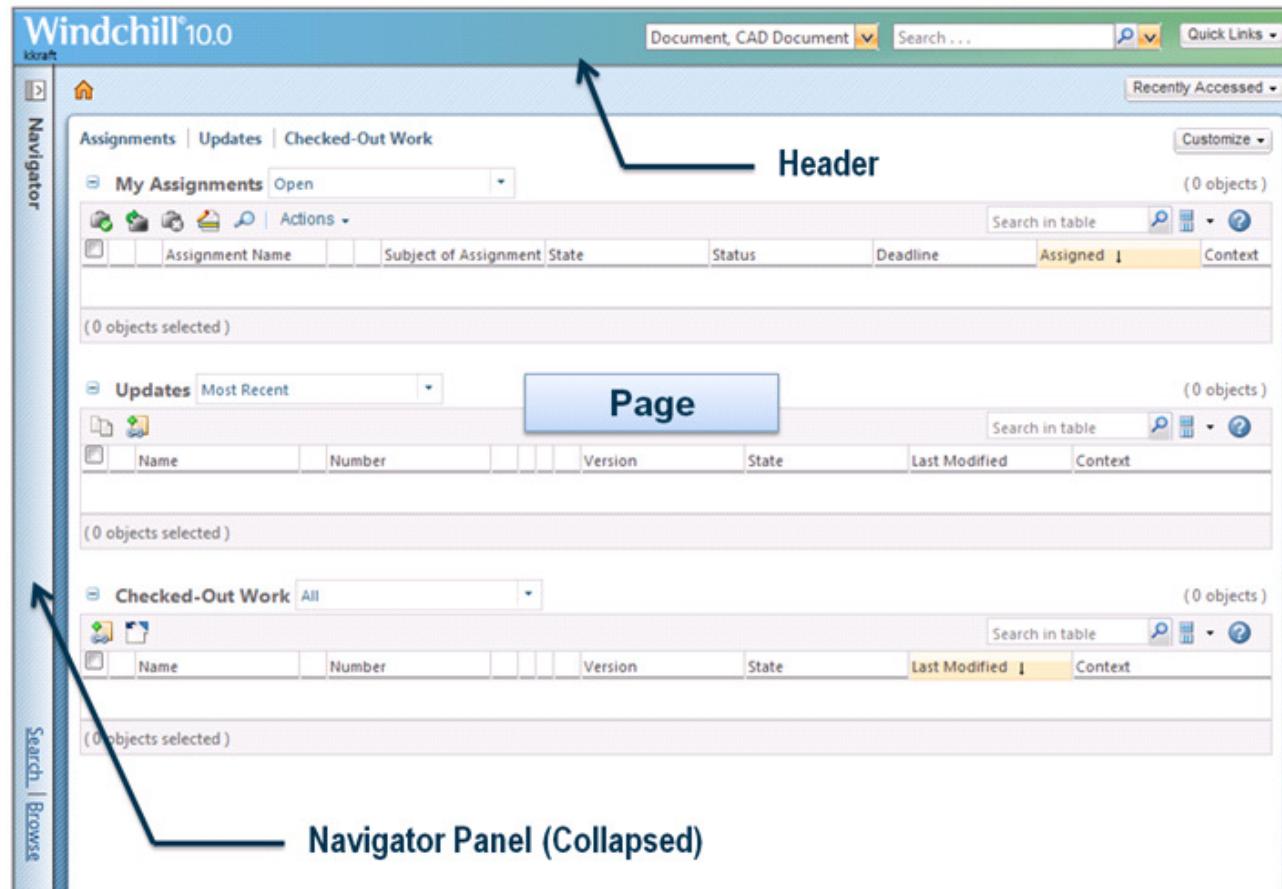
Module 1. Introduction to the Windchill Environment

User Interface



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The Windchill user interface is composed of three sections.



Module 1. Introduction to the Windchill Environment

Home Page

- The Home page provides information that is specific to you.
The Home page can be customize to your need using the Customize menu



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The screenshot shows the Windchill Home Page interface. It features three main sections:

- My Assignments**: Shows a table with columns for Assignment Name, Subject of Assignment, State, Status, and Deadline. A dropdown menu indicates "Open".
- Updates**: Shows a table with columns for Name, Number, Version, State, and Last Modified. A dropdown menu indicates "Most Recent".
- Checked-Out Work**: Shows a table with columns for Name, Number, Version, State, and Last Modified. A dropdown menu indicates "All".

Below each section, a message states "(0 objects selected)".

To the right of the sections, a "Customize" menu is open, listing various Windchill components with checkboxes:

- Assignments (checked)
- Updates (checked)
- Checked-Out Work (checked)
- Packages
- Workspaces
- Meetings
- Notebook
- Subscriptions
- Reports

Module 1. Introduction to the Windchill Environment

Header – Simple Search

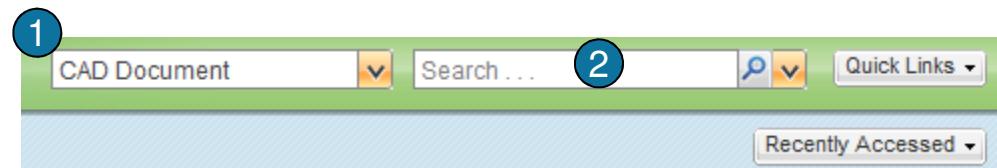
- Simple search capability is controlled by two factors:



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Scope

1. Object Types
 - Document
 - CAD Document
 - WT Parts
2. Key Word Criteria



System Configuration

1. Standard search
2. Index search (google Style!!)

Tip:

- Use the * as a wildcard to increase the search result!!
- Use the menu RECENTLY ACCESS to quickly find the document you recently viewed

Module 1. Introduction to the Windchill Environment

Header – Quick Links menu – Help Menu

- Windchill has many sources of help



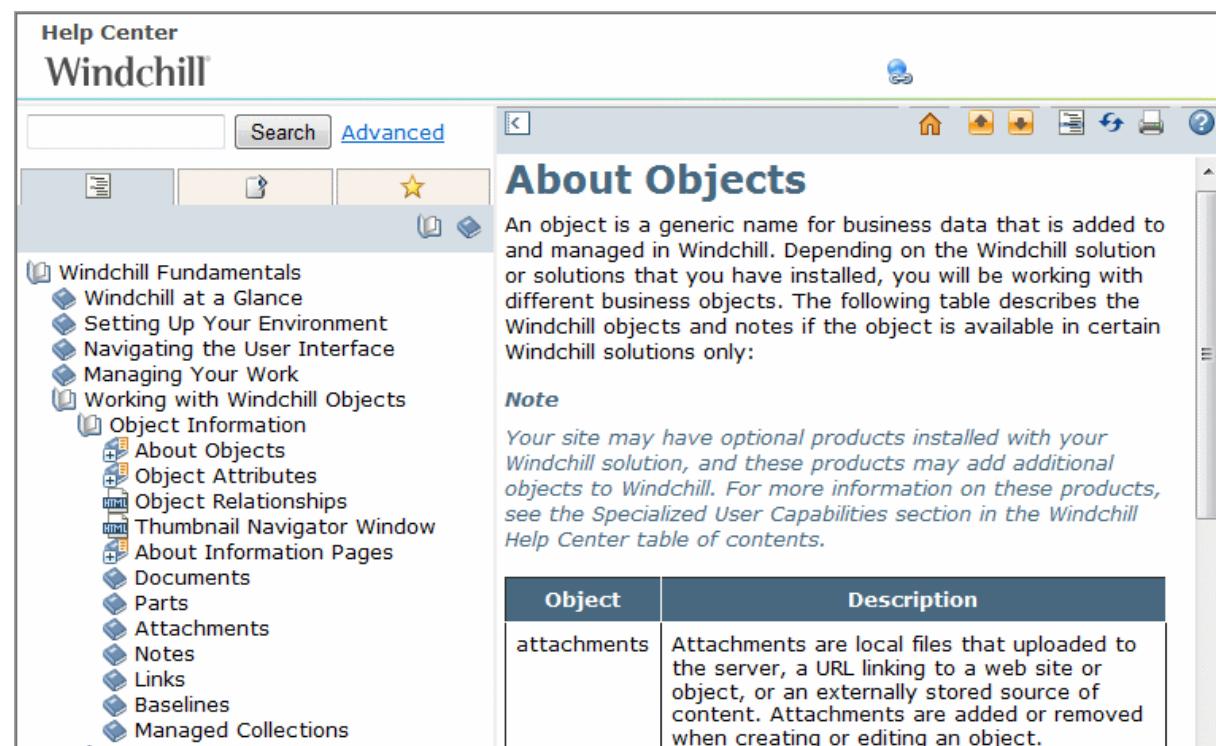
16



A screenshot of the Windchill Quick Links menu. It is a vertical list of links:

- Windchill Help Center
- About Windchill
- Windchill Support Center Website
- Contact Windchill Publications
- Welcome to Windchill 10.0
- Quick Start Guide
- What's New in Windchill

Quick Links Menu



A screenshot of the Windchill Help Center. The title bar says "Help Center" and "Windchill". The left sidebar shows a navigation tree:

- Windchill Fundamentals
 - Windchill at a Glance
 - Setting Up Your Environment
 - Navigating the User Interface
 - Managing Your Work
 - Working with Windchill Objects
- Object Information
 - About Objects
 - Object Attributes
 - Object Relationships
 - Thumbnail Navigator Window
 - About Information Pages
 - Documents
 - Parts
 - Attachments
 - Notes
 - Links
 - Baselines
 - Managed Collections

The main content area is titled "About Objects". It contains the following text:

An object is a generic name for business data that is added to and managed in Windchill. Depending on the Windchill solution or solutions that you have installed, you will be working with different business objects. The following table describes the Windchill objects and notes if the object is available in certain Windchill solutions only:

Note

Your site may have optional products installed with your Windchill solution, and these products may add additional objects to Windchill. For more information on these products, see the Specialized User Capabilities section in the Windchill Help Center table of contents.

Object	Description
attachments	Attachments are local files that uploaded to the server, a URL linking to a web site or object, or an externally stored source of content. Attachments are added or removed when creating or editing an object.

Windchill Help Center



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Demo / Exercices

Module 2

Module 1. Introduction to the Windchill Environment

Module 2. Locating Information

Module 3. Viewing Information

Module 4. Introduction to visualization

Module 5. Managing Your Work

Module 6. Troubleshoot

Module 7. Icon Glossary & reference Document Link



Module 2. Locating Information

Locating Objects

- There are two methods to locate information within Windchill:



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Search

- Search History
- Saved Searches
- Advanced Search



Browse

- Product
- Library



View information

- Attributes
- Content
- Relationships

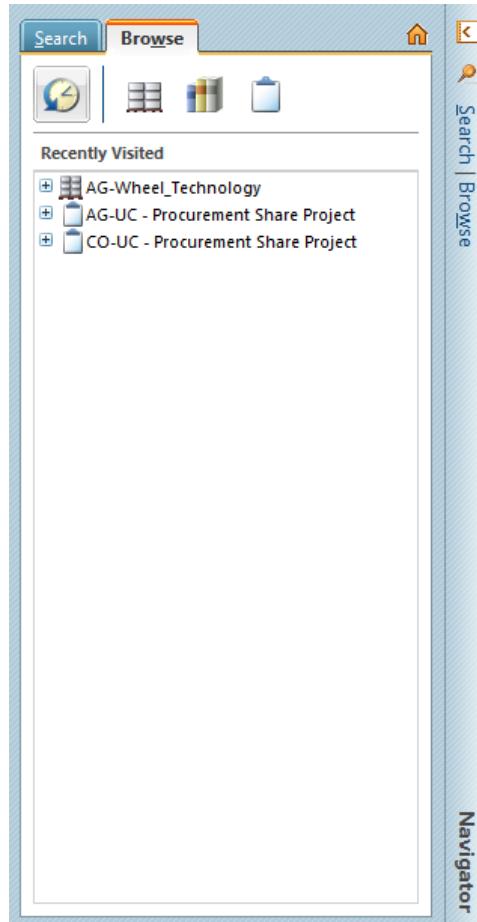
Module 1. Introduction to the Windchill Environment

Navigation Panel

- The Navigator enables you to search or browse for information in Windchill.



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Search Tab

- Search History
- Saved Searches
- Advanced Search

Browse Tab

- Products
- Libraries
- Project

Module 2. Locating Information

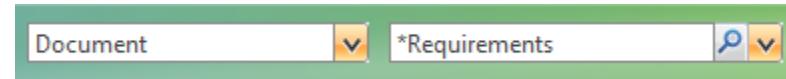
Search

- There are two methods to start a search:

1

Simple Search:

= **KEYWORD Search:** which allow you to search within any fields of an object within the data base. This search is not precise and it is normal that sometimes the result is not consistent depending of the evolution of an object.



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2

Navigator Search Tab:

The screenshot shows the 'Search' tab of the Navigator interface. On the left, there's a 'Search History' section with a list of recent searches, each with edit and delete icons. One entry is highlighted: 'Type=Document; State=Released; Context=All Contexts'. To its right is a 'Saved Searches' section with a 'Manage' link and a list of saved searches, including 'Released Documents'. At the top right of this panel is an 'Advanced Search' link. A red arrow points from this link to the detailed search interface shown in the next screenshot.

Search history:

To execute a search again, click an entry in the Search History or Saved Search list.

Advanced Search :

To Determine a detail search with more criteria.

The screenshot shows the 'Advanced Search' interface. It has fields for 'Keyword' (containing 'Requirements'), 'Type' (with checkboxes for 'All Types' and 'My Favorite Types' including 'CAD Document', 'Document', and 'Part'), and 'Context' (with checkboxes for 'All Contexts' and 'My Favorite Contexts'). A 'Save This Search' button is in the top right corner. A red arrow points from the 'Advanced Search' link in the Navigator interface above to this detailed search screen.

Save Searches:

- You can save any search you frequently use.
- « Manage » enables you to delete, show, hide, export, or import searches list!!

Module 2. Locating Information

Search Result

- Whatever the way you use to start a search, the result search will be display within the a table in the search tab:



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Search Criteria:

- Search criteria can be edit at any time to get a more accurate result.
- The search criteria are always display at the top left of the screen.

A screenshot of a software application interface titled 'Search Results'. At the top, there are tabs for 'Search' and 'Browse', and links for 'Search History and Saved Searches' and 'Advanced Search'. Below the tabs, a search bar contains the criteria: 'Criteria: Keyword=engine;Type>All Types;Context>All Contexts'. To the right of the search bar are buttons for 'Start a New Search' and 'Save This Search'. The main area is a table titled 'Search Results' with a dropdown menu set to 'Default'. The table has columns for Number, Name, Version, State, Context, and Last Modified. There are 25 objects listed. A red arrow points from the first bullet point in the 'Search Criteria:' section to the 'Edit Search Criteria' link in the top left of the screenshot. Another red arrow points from the second bullet point to the search criteria text in the screenshot.

Number	Name	Version	State	Context	Last Modified
RV05004-00	ENGINEERING OFFICIAL REQUIREMENT	P00.3 (Design)	Prototype In Work	PS-ATV	2012-12-20 0:00:00
RV06004-00.ASM	ENGINEERING OFFICIAL REQUIREMENT	C.2	Production Released	PS-ATV	2013-01-31 12:00:00
RV05003-00	ENGINEERING OFFICIAL REQUIREMENT	P00.1 (Design)	Prototype In Work	PS-ATV	2012-11-09 0:00:00
00261	ENGINEERING OFFICIAL REQUIREMENT, RV...	i	Approved	PS-ATV	2012-10-25 12:00:00
RV01504-00.ASM	ENGINEERING OFFICIAL REQUIREMENT	PR1.1	Prototype In Work	PS-ATV	2013-04-02 12:00:00
RV01304-00	ENGINEERING OFFICIAL REQUIREMENT	PR1.2 (Design)	Prototype In Work	PS-ATV	2013-05-10 0:00:00
RV00903-00.ASM	ENGINEERING OFFICIAL REQUIREMENT	PR2.2	Prototype In Work	PS-ATV	2013-05-10 0:00:00
RV01404-00	ENGINEERING OFFICIAL REQUIREMENT	PR1.2 (Design)	Prototype In Work	PS-ATV	2013-05-10 0:00:00
RV01503-00.ASM	ENGINEERING OFFICIAL REQUIREMENT	PR1.2	Prototype In Work	PS-ATV	2013-05-10 0:00:00
RV00603-00	ENGINEERING OFFICIAL REQUIREMENT	B.2 (Design)	Production Released	PS-ATV	2013-01-31 12:00:00
RV00904-00.ASM	ENGINEERING OFFICIAL REQUIREMENT	PR1.2	Prototype In Work	PS-ATV	2013-05-10 0:00:00
RV01203-00	ENGINEERING OFFICIAL REQUIREMENT	B.2 (Design)	Production Released	PS-ATV	2013-01-31 12:00:00
RV01304-00.ASM	ENGINEERING OFFICIAL REQUIREMENT	PR1.2	Prototype In Work	PS-ATV	2013-05-10 0:00:00
RV01204-00	ENGINEERING OFFICIAL REQUIREMENT	B.1 (Design)	Production Released	PS-ATV	2013-01-31 12:00:00
RV01303-00.ASM	ENGINEERING OFFICIAL REQUIREMENT	PR1.2	Prototype In Work	PS-ATV	2013-05-10 0:00:00
	Engineering System Product	i		Camoplast-TS	2012-10-23 12:00:00
RV01403-00	ENGINEERING OFFICIAL REQUIREMENT	PR1.2 (Design)	Prototype In Work	PS-ATV	2013-05-10 0:00:00

Tip:

- Use the filter search to quickly locate document within table result.

Module 2. Locating Information

Using the thumbnail Navigator

- The Thumbnail Navigator assists locating information while conducting searches and while browsing.:.

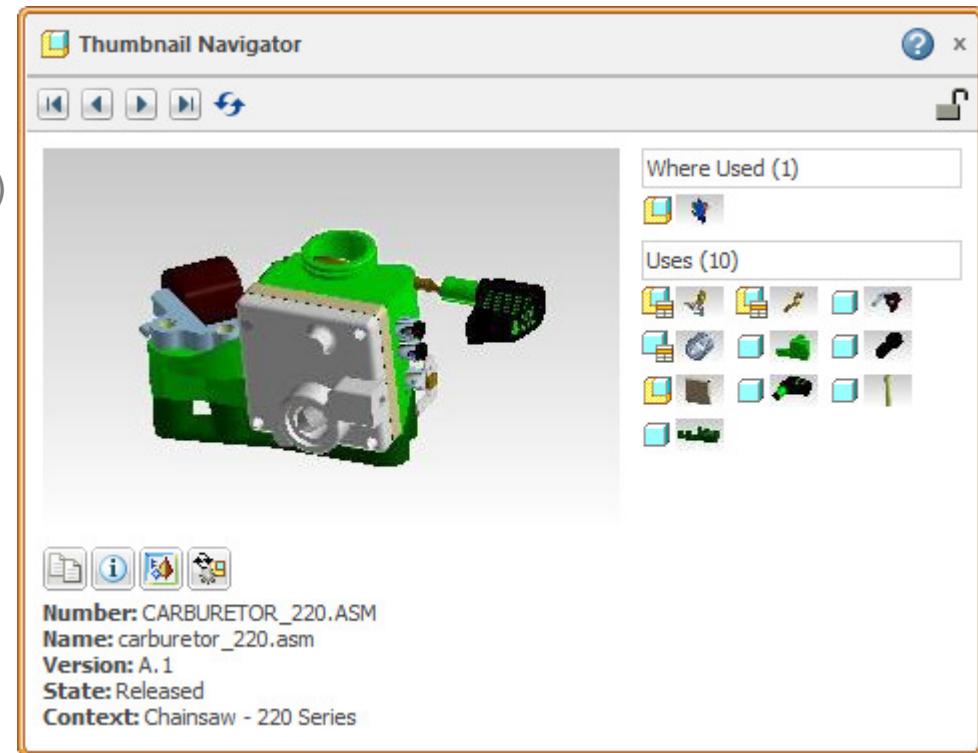


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Provides FAST basic information:

- Basic Attributes (Number,State,...)
- Where Used
- Uses component

Action Icons for more details:



Module 2. Locating Information

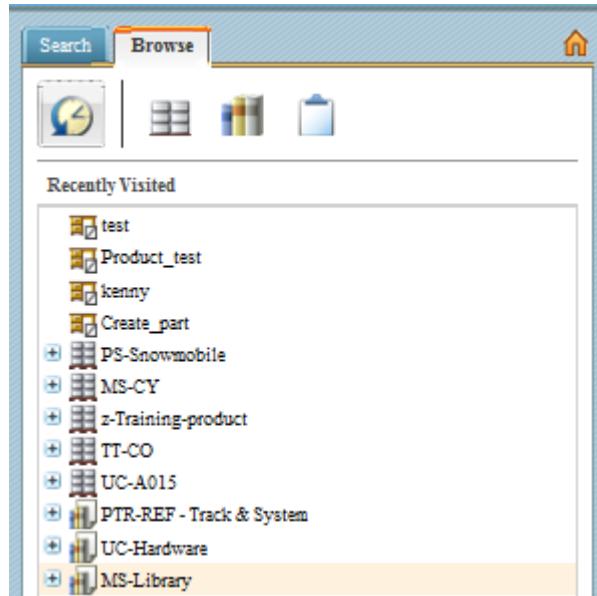
Browsing

Browse for CONTEXT:

- Product Folders  In the Product, you'll find all document related to Product development
- Library Folders  In the Library, you'll find Template
- Project Folders  In the Project, you'll find any document share from Engineering Product

Default views:

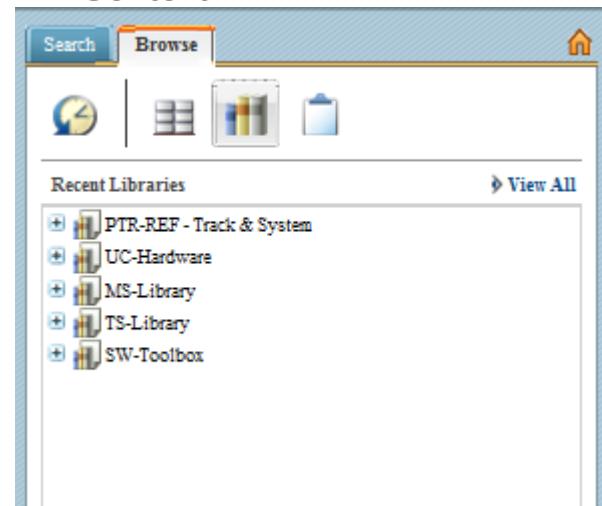
- You can see all recently visited Context:



VS

Library selected views:

- You can see all recently visited Context:



**A “CONTEXT” represent a library or a Product container within Windchill

Module 2. Locating Information

Browsing

Windchill tables have a consistent layout and use common functions.



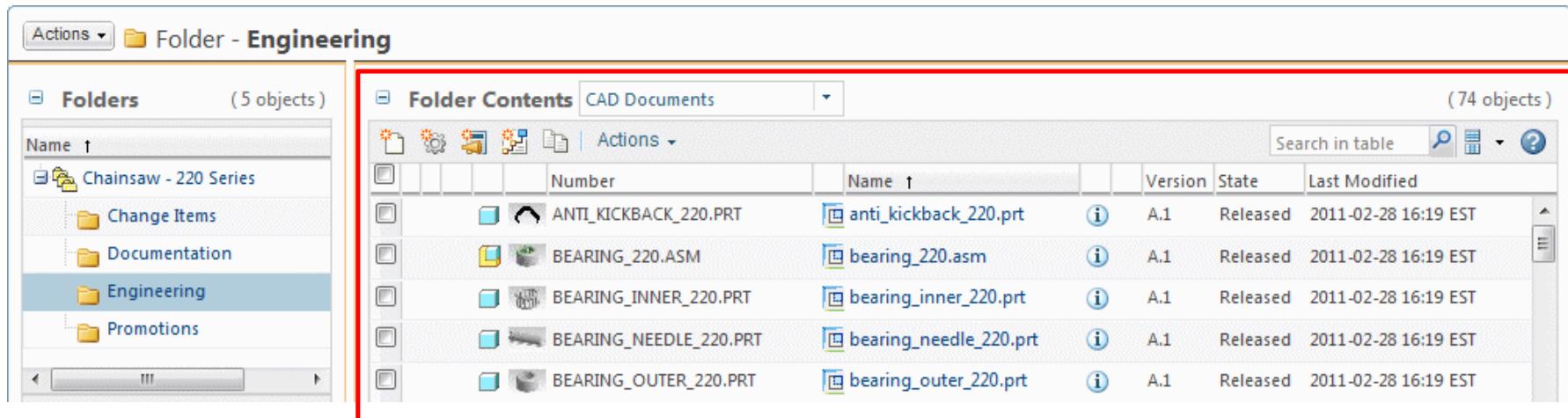
25

Viewing Information:

- View drop-down menu
- Table display options
- Column configuration options
- Change table height
- Find in table utility

Performing Actions

- Tools bars
- Drop-down menus



A screenshot of the Windchill interface showing the 'Folder - Engineering' view. On the left, there's a tree view of folders: 'Chainsaw - 220 Series', 'Change Items', 'Documentation', 'Engineering' (which is selected and highlighted in blue), and 'Promotions'. On the right, a table titled 'Folder Contents CAD Documents' displays 74 objects. The table has columns for Number, Name, Version, State, and Last Modified. The first five rows of data are as follows:

Number	Name	Version	State	Last Modified
ANTI_KICKBACK_220.PRT	anti_kickback_220.prt	A.1	Released	2011-02-28 16:19 EST
BEARING_220.ASM	bearing_220.asm	A.1	Released	2011-02-28 16:19 EST
BEARING_INNER_220.PRT	bearing_inner_220.prt	A.1	Released	2011-02-28 16:19 EST
BEARING_NEEDLE_220.PRT	bearing_needle_220.prt	A.1	Released	2011-02-28 16:19 EST

Module 2. Locating Information

Browsing

Browse for objects and folders like you do in Windows explorer:



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Modify table views:

- Create your views
- Sort columns
- Filter the folder contents table

The screenshot shows a software interface for managing CAD files. On the left, there's a tree view of 'Folders' containing 5 objects: 'Chainsaw - 220 Series', 'Change Items', 'Documentation', 'Engineering' (which is selected), and 'Promotions'. A red arrow points from the 'Engineering' folder in the tree view to the 'Folder Contents' table on the right. The table view is titled 'Folder Contents' and shows 'CAD Documents' with 74 objects. The table has columns for 'Number', 'Name ↑', 'Version', 'State', and 'Last Modified'. The data in the table is as follows:

Number	Name ↑	Version	State	Last Modified
ANTI_KICKBACK_220.PRT	anti_kickback_220.prt	A.1	Released	2011-02-28 16:19 EST
BEARING_220.ASM	bearing_220.asm	A.1	Released	2011-02-28 16:19 EST
BEARING_INNER_220.PRT	bearing_inner_220.prt	A.1	Released	2011-02-28 16:19 EST
BEARING_NEEDLE_220.PRT	bearing_needle_220.prt	A.1	Released	2011-02-28 16:19 EST
BEARING_OUTER_220.PRT	bearing_outer_220.prt	A.1	Released	2011-02-28 16:19 EST

Module 3

- Module 1. Introduction to the Windchill Environment
- Module 2. Locating Information
- Module 3. Viewing Information**
- Module 4. Introduction to visualization
- Module 5. Managing Your Work
- Module 6. Troubleshoot
- Module 7. Icon Glossary & reference Document Link

Module 3. Viewing Information

Access Information Pages



■ To access any detail information of a specific component,

The screenshot shows a software interface for managing CAD documents. On the left, there's a tree view of folders under 'Chainsaw - 220 Series': 'Change Items', 'Documentation', 'Engineering' (which is selected), and 'Promotions'. The main area is titled 'Folder Contents' and shows a list of 74 CAD documents. The columns are 'Number', 'Name', 'Version', 'State', and 'Last Modified'. The 'Name' column lists files like 'ANTI_KICKBACK_220.PRT', 'BEARING_220.ASM', etc. The 'Version' column shows 'A.1' for all. The 'State' column shows 'Released' for all. The 'Last Modified' column shows '2011-02-28 16:19 EST' for all. An 'i' icon is present in the 'Version' column next to the last document, 'CARBURETOR_BODY_220.PRT'. A red arrow points from this 'i' icon down to the explanatory text below. At the bottom left, it says '(0 objects selected)'.

Use the  to access document information page!

Module 3. Viewing Information

Understanding Information page

- Within the information page you'll find detail information related to Attributes/Visualization/Structure/ Object relation and History :



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The screenshot shows a CAD software interface for a drawing named '2c-0006.drw'. The top navigation bar includes 'Actions', a file icon, 'Drawing - 2c-0006.drw, A.5', and a save icon. Below the bar are tabs for 'Details', 'Content', 'Related Objects', 'Changes', and 'History'. A status indicator 'In Work' with a question mark is also present. The main content area is titled 'Visualization and Attributes' with a sub-section 'More Attributes'. On the left, there is a thumbnail preview of the drawing showing a circular part with dimensions like 87.21 mm and 4.15 mm. The right side displays detailed attribute information:

Visualization and Attributes	
File Name:	2c-0006.drw
Number:	2C-0006.DRW
Name:	2c-0006.drw
Status:	Checked in
Modified By:	Carpentier, Marcel
Last Modified:	2007-02-23 14:39 EST

General

Version:	A.5	Generic:	No	Context:	UC-A008 - Hercules
Authoring Application:	Creo	Instance:	No	Created By:	Nadeau, Francois
Type:	CAD Document	Missing Dependents:	No	Created On:	2006-12-11 14:21 EST
Document Category:	Drawing	Incomplete Object:	No	Location:	UC-A008 - Hercules
Document Subcategory:		Description:		State:	Prototype In Work - Prototype Released - In Work - Production Released - Obsolescence - Under Review
		Checkin Comments:		Life Cycle Template:	Camoplast-TS Product Development Life Cycle

Track System

DESIGNATION_1:	MANUFACTURER:	DESCRIPTION:
DESIGNATION_2:	MANUFACTURER_NUMBER:	DESCRIPTION_1:
MODELED_BY:	DESIGNATION_STD:	
DRAWN_BY:	MATERIAL:	
APPROVED_BY:	FINISH:	
CHECKED_BY:	REF_NUMBER:	

Module 3. Viewing Information

Customize Information page

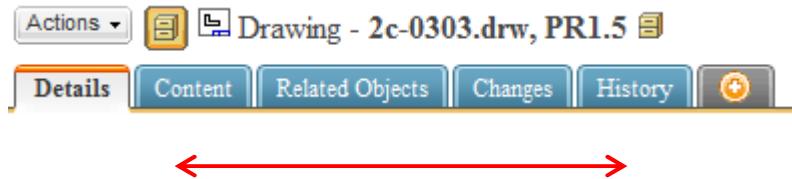
- Customization can be applied per object type
- The level of customization depends on the type of tab



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Default Tabs:

- Move



Custom tabs:

- New Tab
- Move
- Rename
- Close
- Reorder table display



Tip:

- Tabs customization are Object type sensitive, so you can customize according to each objects.

Module 3. Viewing Information

Understanding CAD documents capabilities

- Understanding object capabilities enables you to better use an object's information.

Details:

- Filename
- Names
- Number
- Objects Attributes (description...)

Content:

- Design File (Primary content)
- Visualization content (PVS)
- Attachments (PDF-STEP-DXF)

Related Objects:

- CAD Documents
- Parts
- Reference objects

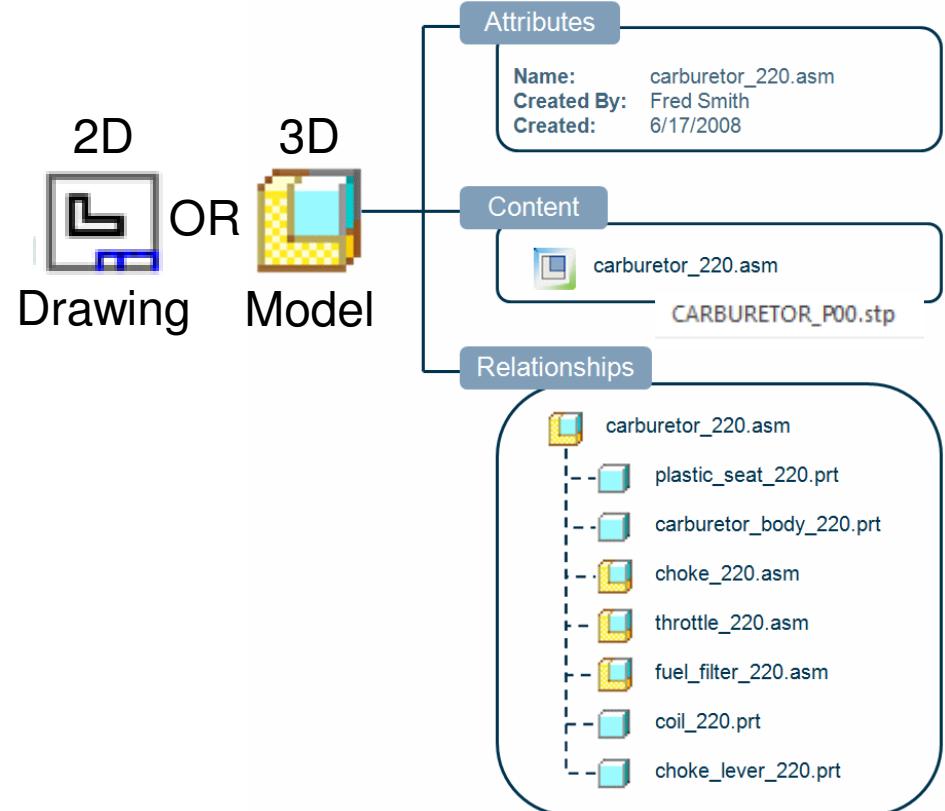
History:

- Object Version history



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Example: CAD Document Capabilities



Module 3. Viewing Information

Derived CAD documents



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- Derived CAD Documents (PDF-DXF-STEP) are classified in that *Attachments* table from the *Content tab*:

Object can be download from that location if needed

Screenshot of a CAD software interface showing the Content tab. The Attachments section is highlighted with a red box.

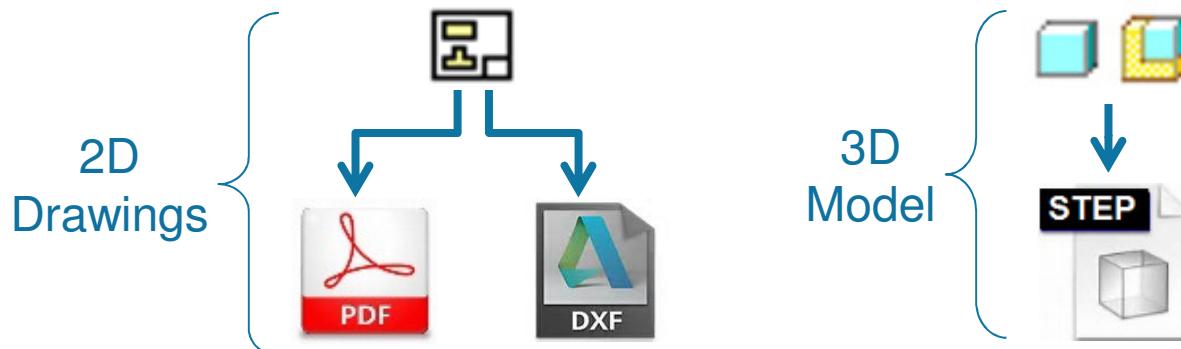
Primary Content

File Name	Actions	Category	File Size	Last Modified	Modifier
2c-1697_raw.drw	Open	Creo UGC	2248.35 KB	2015-09-01 16:21 EDT	Jean-Pierre Beaulieu (jea1bea: Camoplast-TS)

Attachments

File Name	Actions	Status	Download Automatically	Category	File Size	Last Modified	Modifier
2C-1697_RAW_F.dxf	Download	Current	No		823.11 KB	2015-09-02 08:38 EDT	WC Administrator (Administrator: Site)
2C-1697_RAW_F.pdf	Download	Current	No		184.88 KB	2015-09-02 08:38 EDT	WC Administrator (Administrator: Site)

CAUTION:
Refer to Troubleshooting section of this document if the table Attachments is empty.



Camso 2015



ROAD
FREE
COMPANY

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Demo Exercises

Module 4

- Module 1. Introduction to the Windchill Environment
- Module 2. Locating Information
- Module 3. Viewing Information
- Module 4. Introduction to visualization**
- Module 5. Managing Your Work
- Module 6. Troubleshoot
- Module 7. Icon Glossary & reference Document Link



Module 4. Introduction to visualization

Visualization Concepts

- The Windchill Visualization Services (WVS) enables you to view what is stored in the product data management servers by using Creo View.



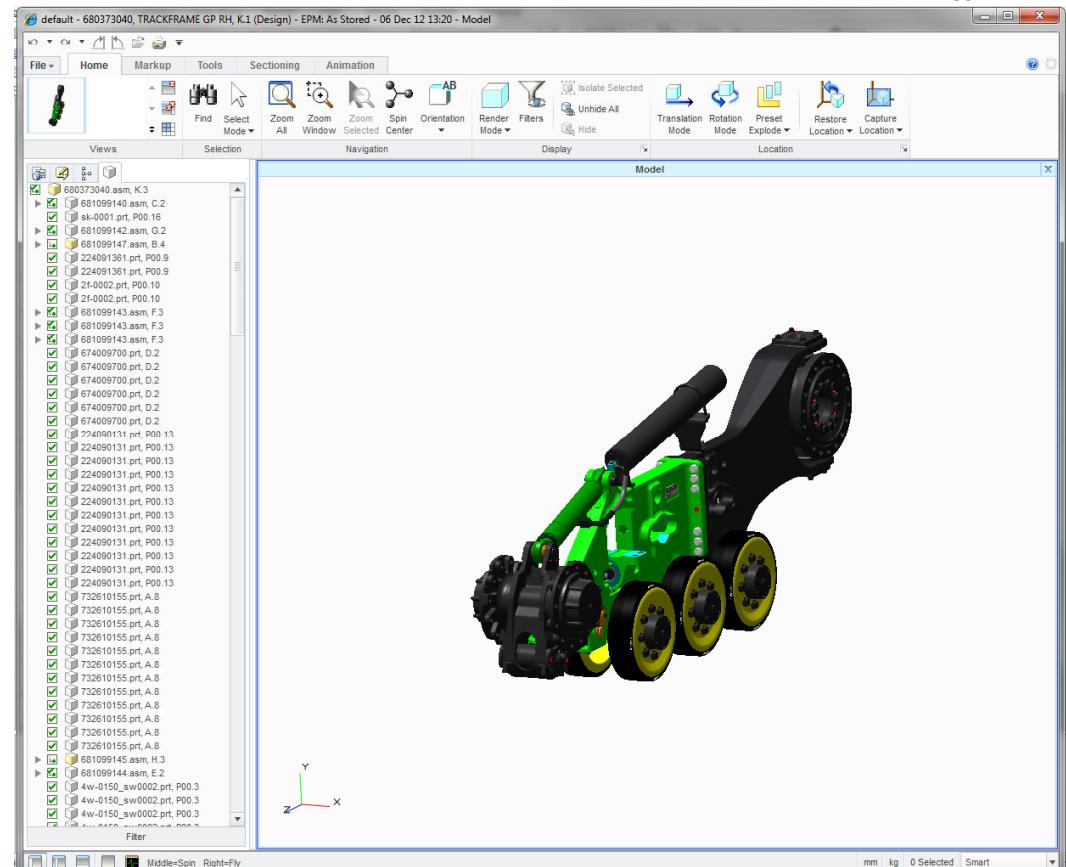
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Before most CAD data can be visualized in Creo View, it must be converted into a neutral file format (.pvs). We call that process:

PUBLICATION

We call the output of the “Publication” a:

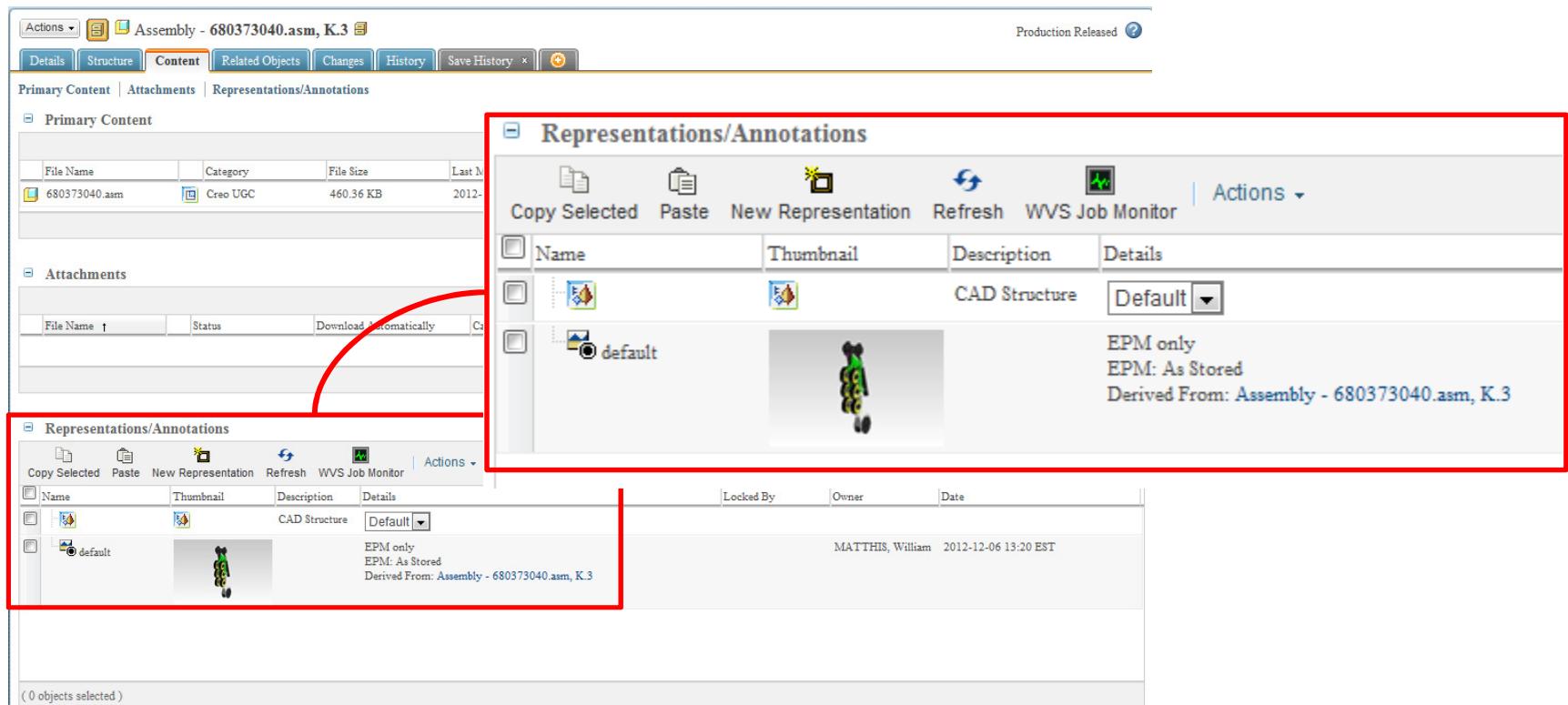
REPRESENTATION



Module 4. Introduction to visualization & Creo View

Identifying visualization

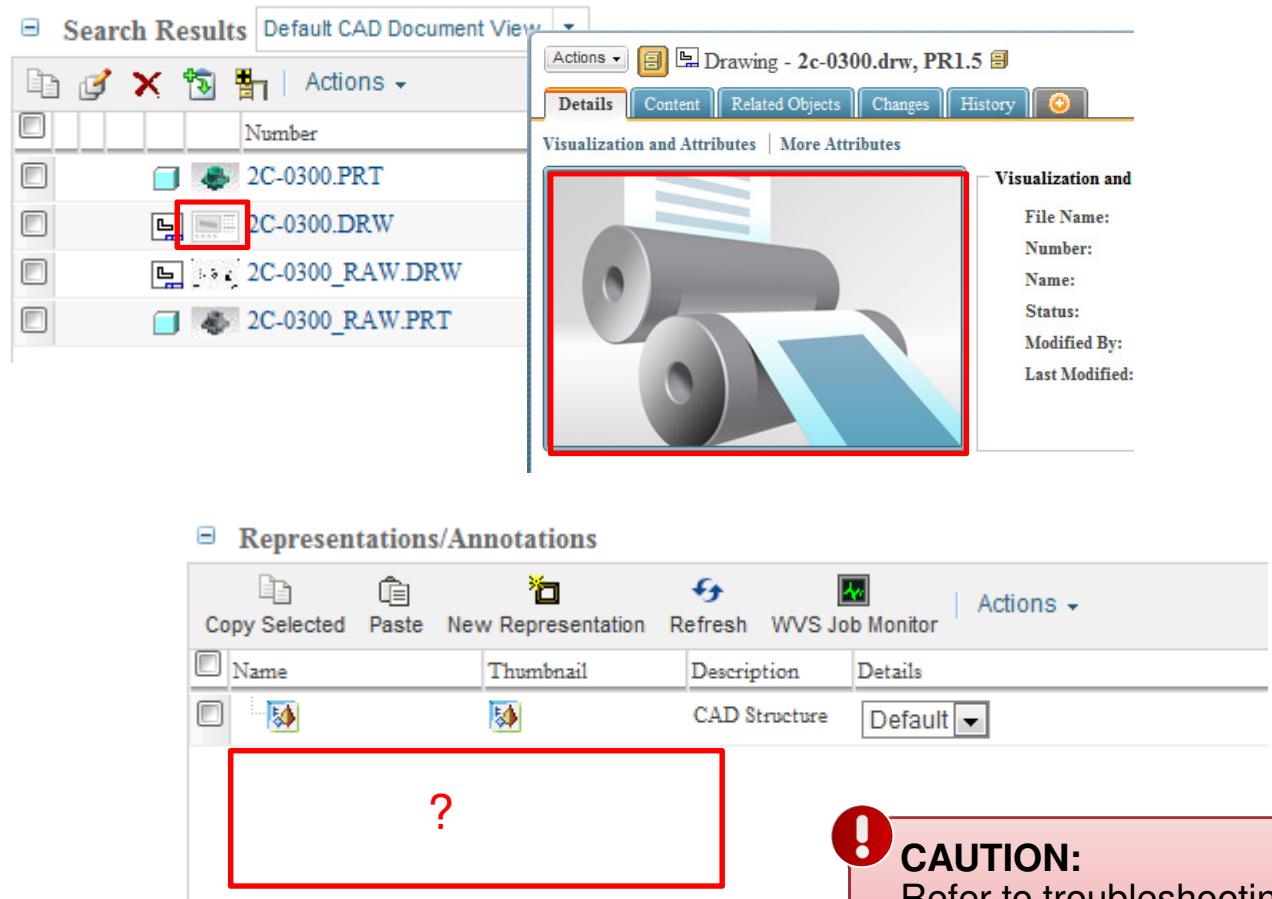
- The representation is located at the “CONTENT” tab in the “Representations/Annotations” Table in the information page of any CAD document object



Module 4. Introduction to visualization

Identifying an object without visualization

- Sometimes some objects have no representation already created!!



The screenshot shows a CAD software interface with two main sections:

- Search Results:** A list of files under "Number".
 - 2C-0300.PRT
 - 2C-0300.DRW (highlighted with a red box)
 - 2C-0300_RAW.DRW
 - 2C-0300_RAW.PRT
- Representations/Annotations:** A table showing representations for the selected file.

Name	Thumbnail	Description	Details
?	(empty)	CAD Structure	Default

A large red box highlights the question mark icon in the first column.



CAUTION:

Refer to troubleshooting section of this document if the REPRESENTATION is missing.

Module 4. Introduction to visualization

Starting Creo View from Windchill

Creo View launches automatically when you specify a valid object to view from Windchill.

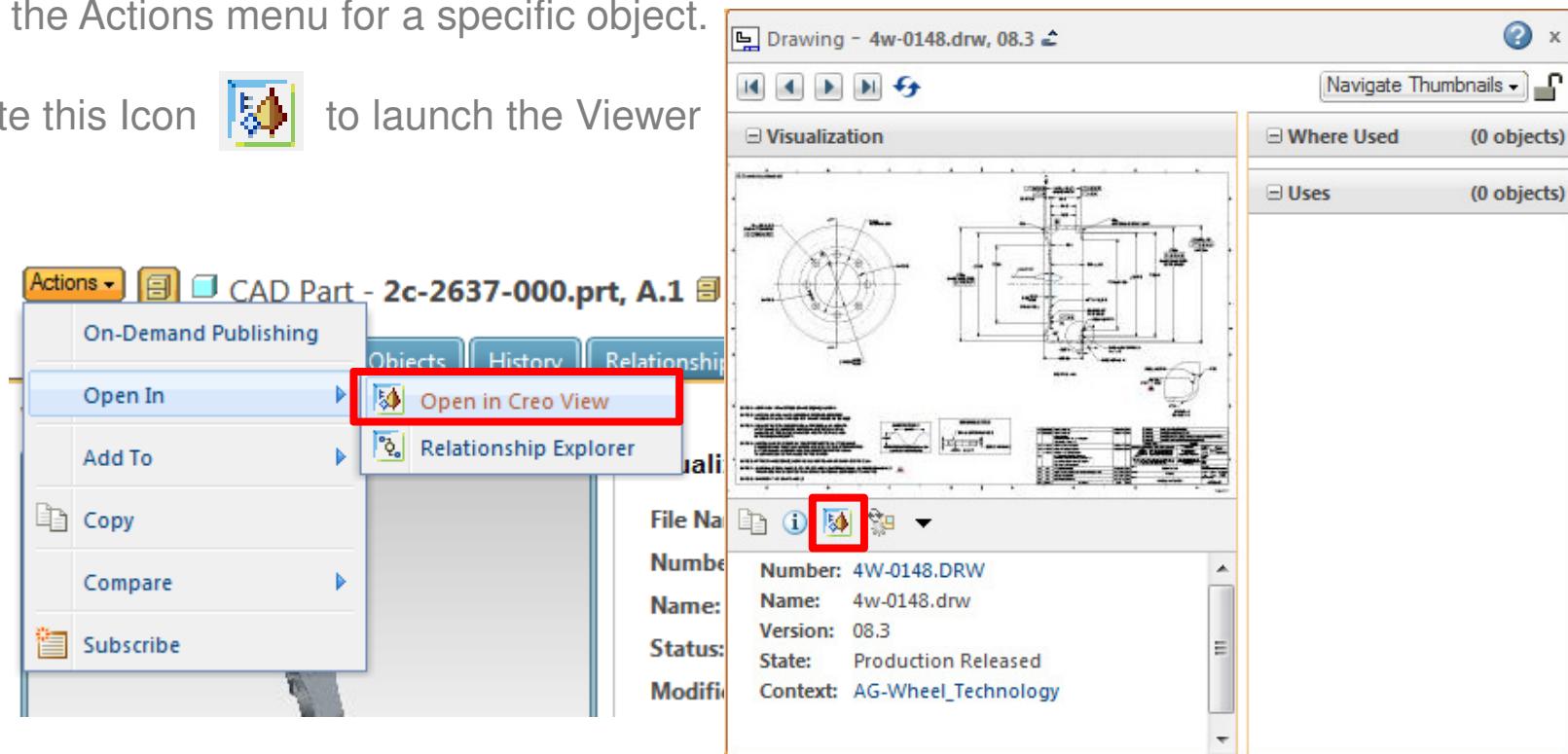


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Launch from numerous UI location, including:

- Thumbnails on the Information page.
- Thumbnail Navigator
- In the Actions menu for a specific object.

Locate this Icon  to launch the Viewer

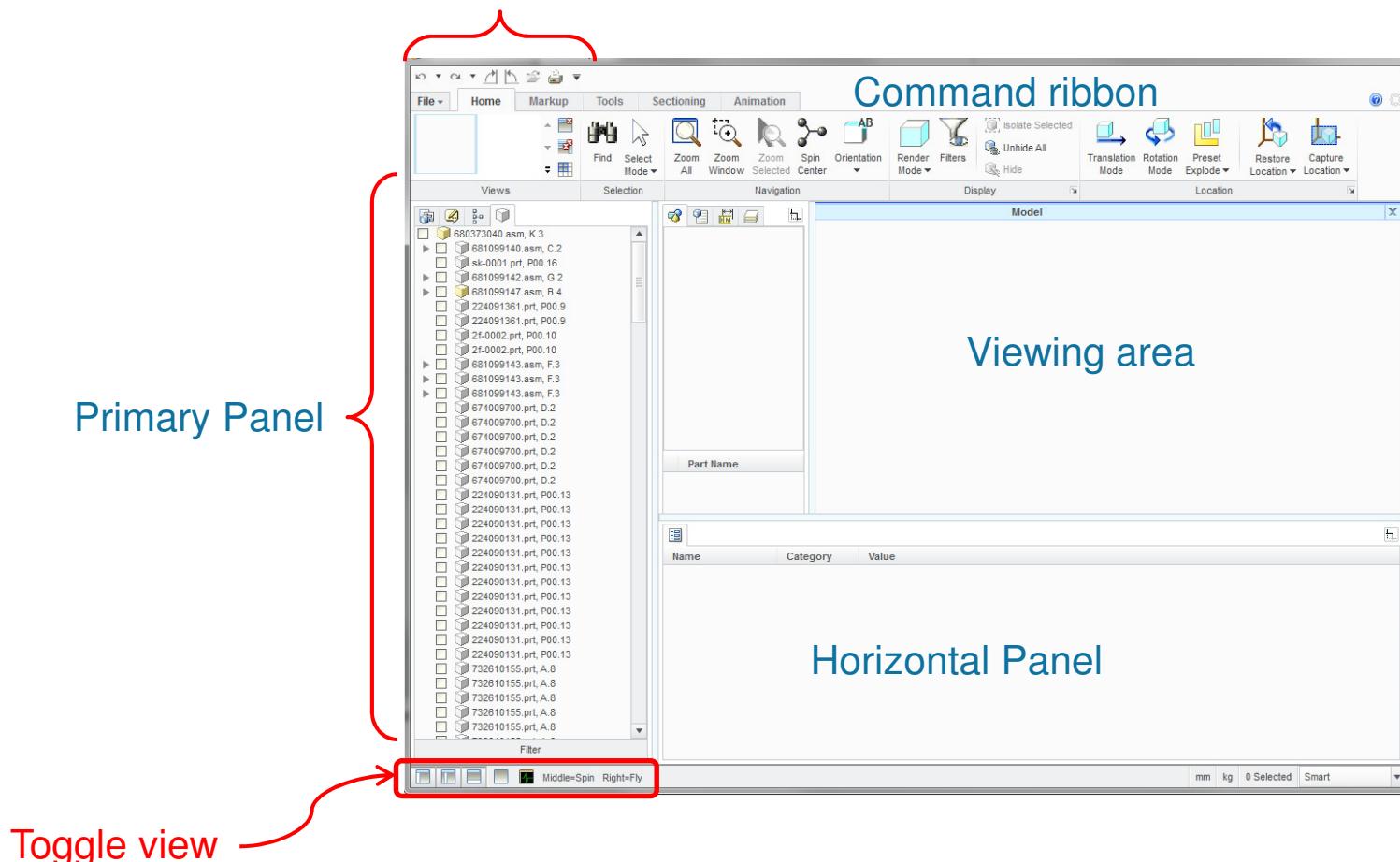


Module 4. Introduction to visualization

Creo View User Interface

- The User Interface includes the following areas:

Quick Access Toolbar



Module 4. Introduction to visualization

Primary Panel UI

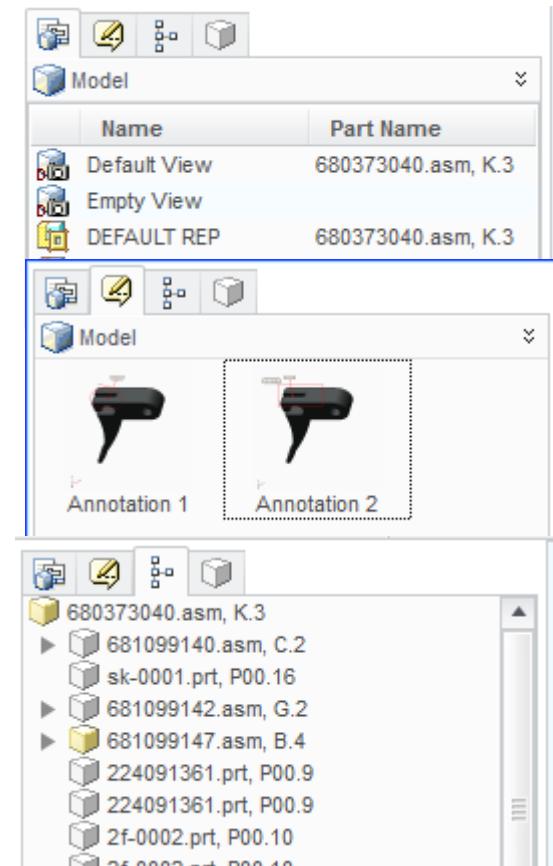
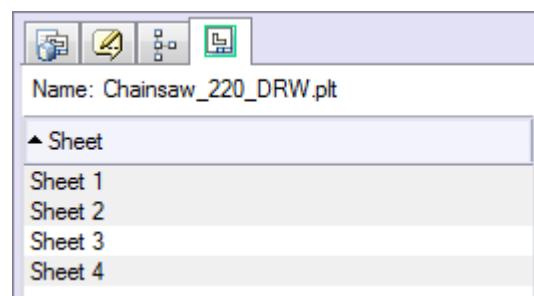
- The Primary Panel is the main method through which to open viewable objects in Creo View..



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The Primary panel contains the following tabs:

- The viewable tab
- Annotations Sets tab
- Structure tab
- View tab
 - * One view tab for each corresponding view windows



Module 4. Introduction to visualization

Horizontal Panel UI

- The Horizontal Panel displays the attribute information for selected parts.



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Attributes tab:

- Displays attribute information from the native CAD data about the selected components.
- You can filter the attribute information according to categories or matching

681099142.asm, G.2		
Name	Category	Value
PROI_COMPONENT_NAME	PROE Component Param...	ProE_Comp_26
DATE	PROE Parameters	2007/03/24
DESIGNATION_1	PROE Parameters	CENTER REACTION ARM GP
DRAWN_BY	PROE Parameters	FRANCOIS NADEAU
PTC_WM_REVISION	PROE Parameters	G
PTC_WM_ITERATION	PROE Parameters	2
FINISH	PROE Parameters	NONE
PTC_WM_VERSION	PROE Parameters	G.2
REF_NUMBER	PROE Parameters	RE272355
MANUFACTURER	PROE Parameters	CAMO

Module 4. Introduction to visualization

Loading Viewable

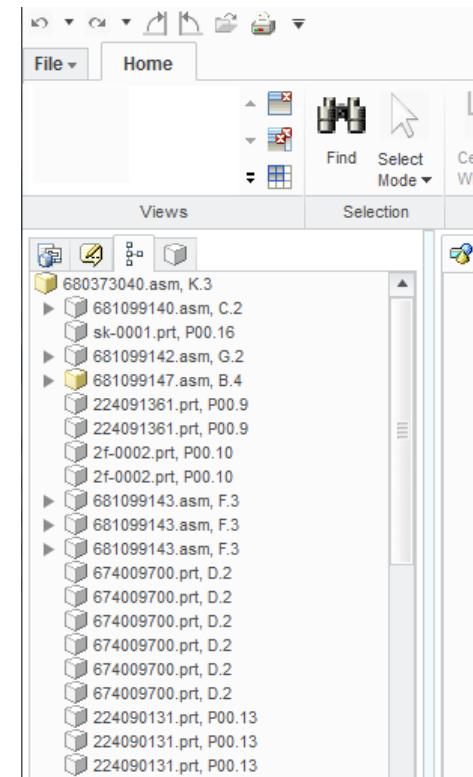
- Within the View tab of an assembly, select the empty check box next to the component whose viewable you wish to load .

For 3D model:

- Single Models are loaded automatically;
- You can easily unselect and unload component;
- You can load any Creo Simplified representation.

For 2D Drawings, document, image:

- The viewable is automatically loaded.



Tip:

- Default load behaviors can be change within the “preference manager”.

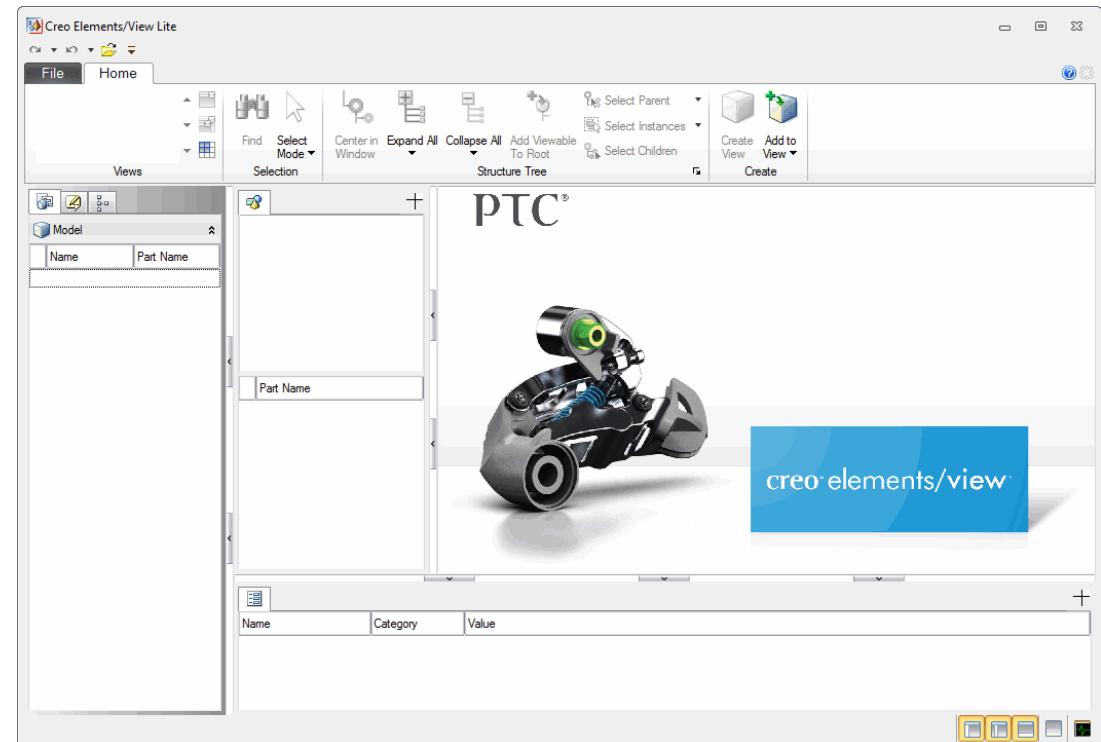
Module 4. Introduction to visualization

Starting Creo View as a stand alone client

- If you have visualization files on your local hard drive, you can open them into Creo View using Windows Explorer as you would do with any other file.

- You can open any local object type able to be viewed.
(ProE Native, Image, PDF, ect.)

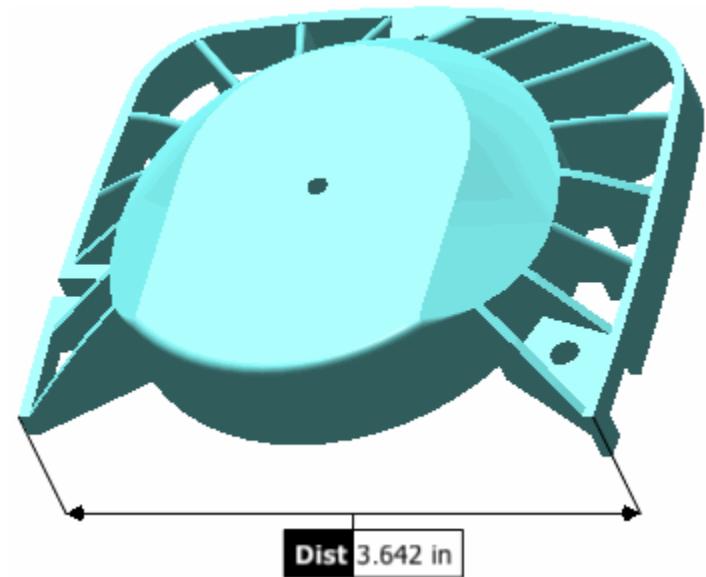
- Double-clicking a local PVS, PVZ, OL, ED, or EDZ file launches Creo View as a standalone client.



Module 4. Using Creo View to View and Annotate Information

Measuring Distances

- The Distance function enables you to measure the distance between two references in a drawing or model.
- The From and To collectors enable you to specify references.
- By default, the system measures the absolute distance between specified references.
- The system provides the minimum distance between two references that are of varying distance.
- Project distances separately along the X, Y, or Z axes.



Module 4. Using Creo View to View and Annotate Information

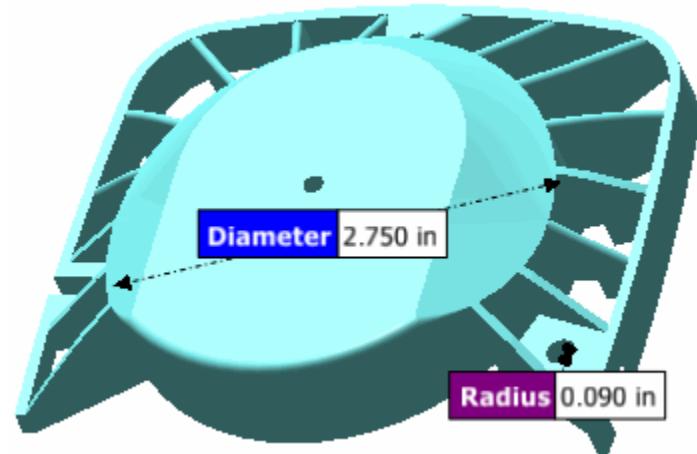
Measuring Diameter or Radius

- The Diameter or Radius function enables you to measure diameter or radius of curves or surfaces.



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- You can specify a reference whose diameter is measured.
- You can toggle the dimension between a diameter and radius.
- If you select a curve with varying radii, the system provides the diameter or radius at the selected arc location.



Module 4. Using Creo View to View and Annotate Information

Measurement Summary

- The Summary function calculates the appropriate summary elements for any component or feature selected in a model or drawing.



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The Summary measurement information displayed is context-specific to the type of reference(s) selected.

- Length for line and edge references.
- Volume for part and assembly references.
- Area for surface references.

Selected references display in the Measurement Summary dialog box.

- You can remove individual references.

A 3D CAD model of a green agricultural implement, specifically a front-end loader bucket. A selection cube highlights a specific volume within the bucket's body. To the right of the model is a screenshot of the 'Measurement Summary' dialog box. The dialog box has a title bar 'Component' and a table with the following data:

Component	
Name	4w-0150_sw0002.prt, P00.3
Area	663427.114 mm ²
Volume	4.467e+006 mm ³
Mass	19.812 kg
Centroid	(-138.906, -357.889, 666.486) mm
Envelope	~(135.975, 427.833, 427.833) mm

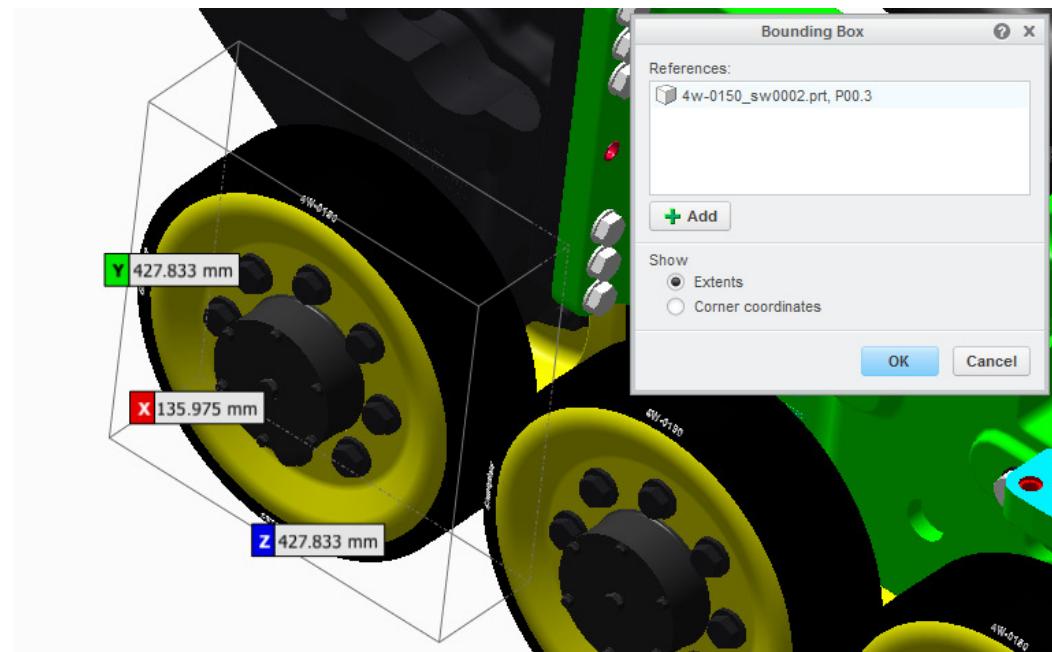
Module 4. Using Creo View to View and Annotate Information

Measuring Component Dimensions

- The Component function enables you to view the X, Y, and Z dimensions of the selected component's bounding box.
- This measurement type is only available on 3-D models.
- Multiple components can be selected.



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Demo / Exercices

Module 5

- Module 1. Introduction to the Windchill Environment
- Module 2. Locating Information
- Module 3. Viewing Information
- Module 4. Introduction to visualization
- Module 5. Managing Your Work**
- Module 6. Troubleshoot
- Module 7. Icon Glossary & reference Document Link

Module 5. Managing Your Work

Managing Assignments

- The Overview page provides tools to manage assignments.



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A screenshot of a software application window titled "My Tasks". The window shows a single task entry in a table format. The columns are labeled "Name", "Subject", "State", and "Status".

Name	Subject	State	Status
Deliverable - Approve Promotion Request	rv-test-01.drw, RV-TEST-01 DRW, PR2 2, 2013-04-28	Under Review	Potential

(0 objects selected)

Module 5. Managing Your Work

Managing the Notebook

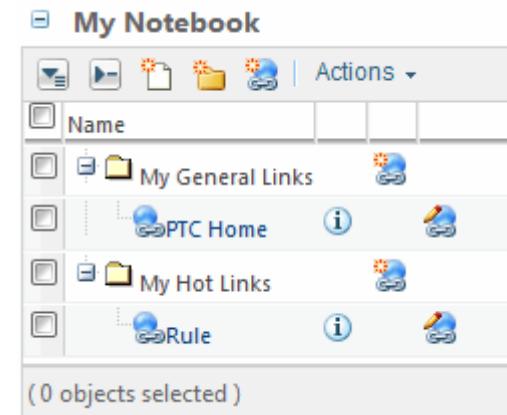
- The Notebook tool in Windchill enables you to store links to Web pages.



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Windchill Notebook:

- Stores links to Web pages.
 - Add to Hot Links
 - Manually create links
- Uploads and stores files.
- Organizes your Notebook with folders.



Module 5. Managing Your Work

Managing Subscriptions

- Windchill notifies object subscribers when an event occurs involving that object.



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Subscriptions:

- Content Objects
 - End Items
 - Parts
 - CAD Documents
 - Documents
- Discussion Objects
 - Discussion Topics
 - Discussion Postings

A screenshot of the Windchill Subscriptions interface. The title bar says "Subscriptions My Subscriptions". Below the title bar is a toolbar with a red X button and a refresh icon. A table follows, with columns: Name, Events, Subject, and Context. There is one row in the table: "trigger_900.prt" under Name, "Check In from Project" under Events, "Drill - 900 Series" under Context. At the bottom of the table, it says "(0 objects selected)".

	Name	Events	Subject	Context
<input type="checkbox"/>	trigger_900.prt	i Check In from Project		Drill - 900 Series

Module 5. Managing Your Work

Preference Manager

- The Preference Manager enables you to view and set preferences.



The Preference Manager enables::

- You to view and set preferences.
- Administrators to view and set preferences for various application contexts.

The image shows two screenshots illustrating the Preference Manager. On the left, a screenshot of a software interface with a sidebar containing links like 'Find in', 'Preferences' (which is highlighted with a red box), 'Profile', and 'Calendar'. A red arrow points from this 'Preferences' link to the right screenshot. The right screenshot shows the 'Preference Manager' interface with a tree view on the left and a table on the right. The table has columns for 'Name', 'Value', and 'Description'. Some visible rows include 'Add to Baseline', 'Attachments', 'Default File Path', 'Document Name', 'File Download Behavior', 'File Download Mechanism', 'File Upload Mechanism', 'Send local file to Recycle Bin', and 'Attribute Handling'.

Name	Value	Description
Add to Baseline		Add to Baseline operation preferences
Attachments		
Default File Path		Specifies a default directory for uploading and
Document Name	Yes	Determines whether or not the Name field shov
File Download Behavior	Always ask wheth...	Determines whether downloaded files are oper
File Download Mechanism	Use basic browser...	Determines how to download files from Wind
File Upload Mechanism	Use Java applet fu...	Determines how to upload files to Windchill.
Send local file to Recycle Bin	No	Determines whether the Send local file to Recy
Attribute Handling		

Module 5. Managing Your Work

E-mailing a Page & Team Members

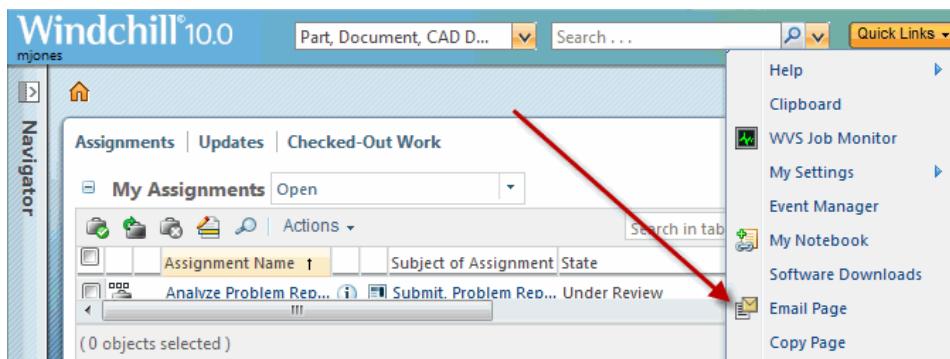


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- You can communicate with your team members by E-mailing them a Windchill page.

When you are in any Information page you need to share!! :

1 GoTo “Quick Links / Email page” :



3 Message Details:

* Subject: Drill - 900 Series

Message: Look at this

Additional text for the message:

2 Selecting Recipients:



Module 5. Managing Your Work

Using the Windchill Clipboard

- The Windchill clipboard enables you to cut, copy, and paste objects and URLs in the Windchill system.

Clipboard enables you to:

- Cut/Paste objects.
- Copy/Paste objects.

But also Print using Creo View!!



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A screenshot of a Windows Internet Explorer window titled "Clipboard - Windows Internet Explorer". The address bar shows the URL: "http://ptc-training.ptc.com/Windchill/ptc1/object/clipboard?unique_page_number=126&AjaxEnabled=compC". The main content area is a "Clipboard" dialog box. At the top of the dialog is a section titled "Object List" with a "(2 objects)" count. Below this is a table with columns: Number, Version, Name, Thumbnail, Description, and Parent. Two items are listed:

Number	Version	Name	Thumbnail	Description	Parent
CARBURETOR_900	A.1 (Design)	carburetor_900			
AUGER_BIT_	A.1 (Design)	auger_bit_			

At the bottom of the dialog are "OK" and "Cancel" buttons. The status bar at the bottom of the browser window shows "Trusted sites | Protected Mode: Off" and a zoom level of "100%".



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Demo /Exercices

Module 6

Module 1. Introduction to the Windchill Environment

Module 2. Locating Information

Module 3. Viewing Information

Module 4. Introduction to visualization

Module 5. Managing Your Work

Module 6. Troubleshoot

Module 7. Icon Glossary & reference Document Link



Module 6. Troubleshooting

Managing Publication & Representation.

- Sometimes some object have no Representation already created!!



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The screenshot shows two windows from a CAD application:

- Representations/Annotations**: A table with columns for Name, Thumbnail, Description, and Details. The first row's thumbnail cell is highlighted with a red box containing a question mark, indicating a missing representation.
- Search Results**: A list of files under "Default CAD Document View".
 - 2C-0300.PRT: Has a thumbnail icon.
 - 2C-0300.DRW: Has a thumbnail icon.
 - 2C-0300_RAW.DRW: Has a thumbnail icon.
 - 2C-0300_RAW.PRT: Has a thumbnail icon.A red box highlights the thumbnail icon for the DRW file.

On the right, a detailed view of the 2C-0300.DRW file is shown, featuring a 3D model of two cylindrical parts and a "Visualization and Attributes" panel with fields for File Name, Number, Name, Status, Modified By, and Last Modified.

Module 6. Troubleshooting

Managing Publication & Representation.



- If a representation did not exist, you can request a creation on demand:

The screenshot shows a CAD application interface with several windows open. At the top, a toolbar titled 'Representations/Annotations' includes icons for Copy Selected, Paste, and New Representation, with the 'New Representation' button highlighted by a red box and arrow. Below the toolbar is a table with columns for Name, Thumbnail, Description, and Details. A red curved arrow points from the 'Content' tab in the 'Thumbnail Navigator' dialog down to the 'New Representation' button. The 'Thumbnail Navigator' dialog itself has a 'Criteria: Keyword' field and a search results list. One item in the list is circled in red. To the right, a detailed view of a drawing file ('Drawing - 2c-0300.drw, PR1.5') is shown, featuring a 3D model of two cylindrical parts and a 'Visualization and Attributes' panel with file details like File Name, Number, Name, Status, Modified By, and Last Modified.

Module 6. Troubleshooting

Managing Publication & Representation.

- You launch the publication and you still don't see any Representation? Validate your job request on the WVS Job Monitor :



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The screenshot shows the WVS Job Monitor interface. On the left, there is a sidebar with various links: Help, Clipboard, WVS Job Monitor (which is highlighted with a red box), My Settings, Event Management, My Notebook, Software Downloads, Email Page, and Copy Page. A red arrow points from the 'WVS Job Monitor' link in the sidebar to the top window. The top window is titled 'WVS Job Monitor - Windows Internet Explorer' and displays a table titled 'Job Summary for Site All'. It lists 71 objects with columns for Position, Q, Job, Job Status, Number, Name, Version, Context, User, and Post. The bottom window is titled 'WVS Job Monitor - Windows Internet Explorer' and displays a table titled 'Job Summary for Site Executing Jobs'. It lists 3 objects with columns for Position, Q, Job, Job Status, Number, Name, Version, Context, User, and Post. Both tables have a 'Turn Auto Refresh On' checkbox and a 'Search in table' button.

- Ready** means that the job is send and ready to be publish by the CAD work server.
- Executing** means That the job is send and ready to be publish by the CAD work server.

** The system can treat a maximum of 3 objects at the time **

Module 6. Troubleshooting

On-Demand Publishing



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The screenshot shows a software interface for managing files. At the top, there's a toolbar with icons for Actions, Drawing - 674010100_raw.drw, B.2, and a dropdown menu. To the right of the drawing name is a status indicator 'Production Released' with a gear icon. Below the toolbar, a navigation bar has tabs: Details, Content (which is selected), Related Objects, History, Relationship Explorer, and a search icon.

The main content area has three sections:

- Primary Content**: Shows one object. The table has columns: File Name, Actions, Category, File Size, Last Modified, and Modifier. The data is:

File Name	Actions	Category	File Size	Last Modified	Modifier
674010100_raw.drw		Creo UGC	545.03 KB	2007-02-22 16:19 EST	WC Administrator (Administrator: Site)
- Attachments**: Shows zero objects. The table has columns: File Name, Actions, Status, Download Automatically, Category, File Size, Last Modified, and Modifier. The table is empty.

A red box highlights the 'Attachments' section, and a large red question mark is placed inside it.

Module 6. Troubleshooting

On-Demand Publishing

1. Check box multiple object

2. Goto to action menu select On-Demand Publishing

The screenshot shows the Windchill interface with the following details:

- Left Panel (Navigator):** Shows a tree view of folders: z-Training-product > Promotion Requests > Training > Design Model & Drawings > Drill Example > Manage Publish Content.
- Middle Panel (Actions):** A table titled "Folder - Manage Publish Content" showing "Folders (8 objects)". One folder, "z-Training-product", is expanded to show its contents: Promotion Requests, Training, Design Model & Drawings, Drill Example, and Manage Publish Content.
- Right Panel (Actions):** A table titled "Folder Contents" showing "All" items. The first item is TRN001-01, tm001-01, TRACKFRAME PIVOT PLA... (Number: TRN001-01, Name: tm001-01).
- Action Bar:** Includes buttons for New Document, New Part, New Folder, Copy, Add to Workspace, and Actions.
- Context Menu (On-Demand Publishing):** A red box highlights the "On-Demand Publishing" option in the context menu, which includes: Open, New, Cut, Copy, Paste, Move, Check out to workspace, Edit Multiple Objects, Revise, Save As, Set State, Delete, and Add to Workspace.

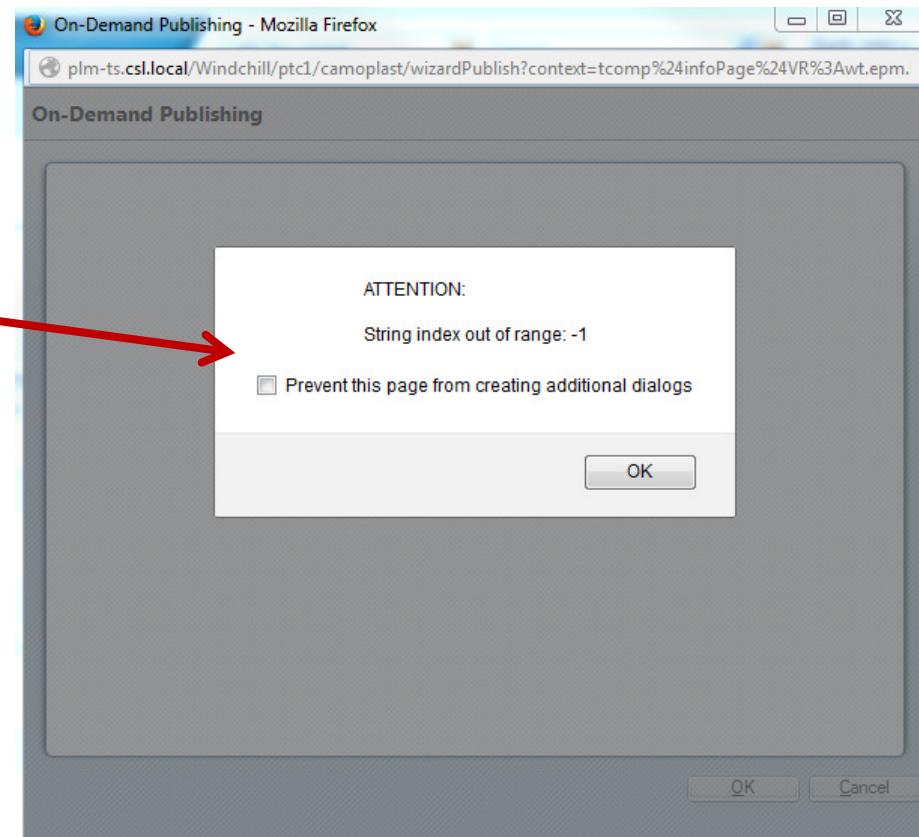
Module 6. Troubleshooting

On-Demand Publishing



CAUTION:

Publish Content can be created from a folder structure or PDM Product/Library only. If you have access to a component from the Project only you will not be able to generate the Derived CAD Document PDF-DXF-STEP



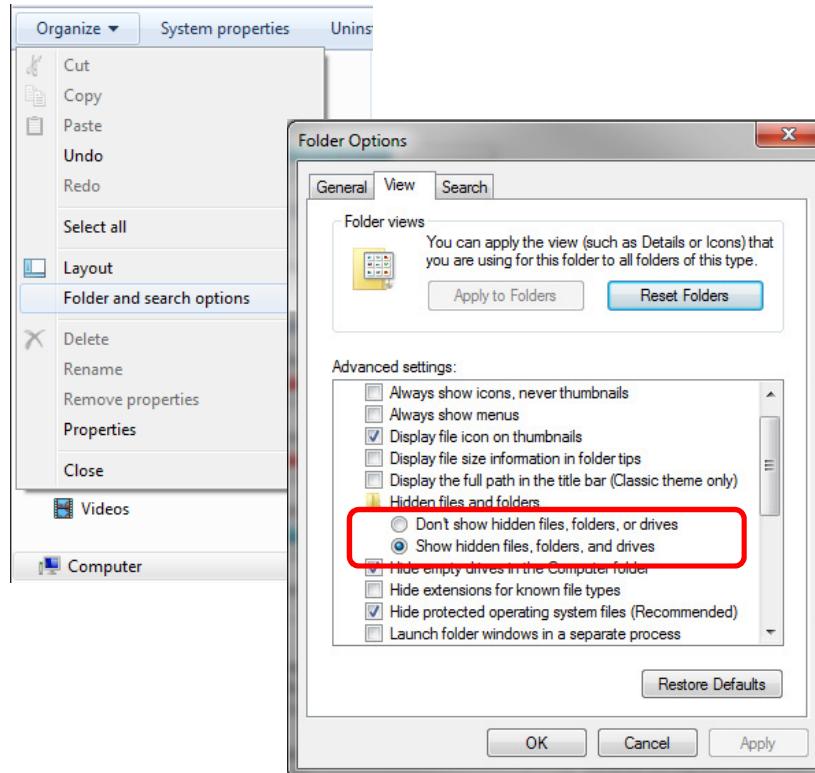
You will receive this message if you are in a location where the functionality is not available

Module 6. Troubleshooting

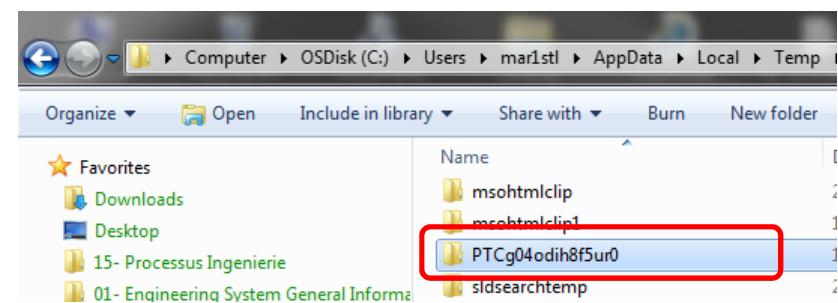
Managing Publication & Representation.

- Creo View did not Start and freeze on black screen:
 - Sometimes the Web browser freeze Creo view process and stay stock on an older session;

- 1 Close all IE web browser and enable to show hidden folder:



- 2 GoTo C:\Users\Username\AppData\Local\Temp
Delete all folder beginning by PTC*...*



Module 6. Troubleshooting

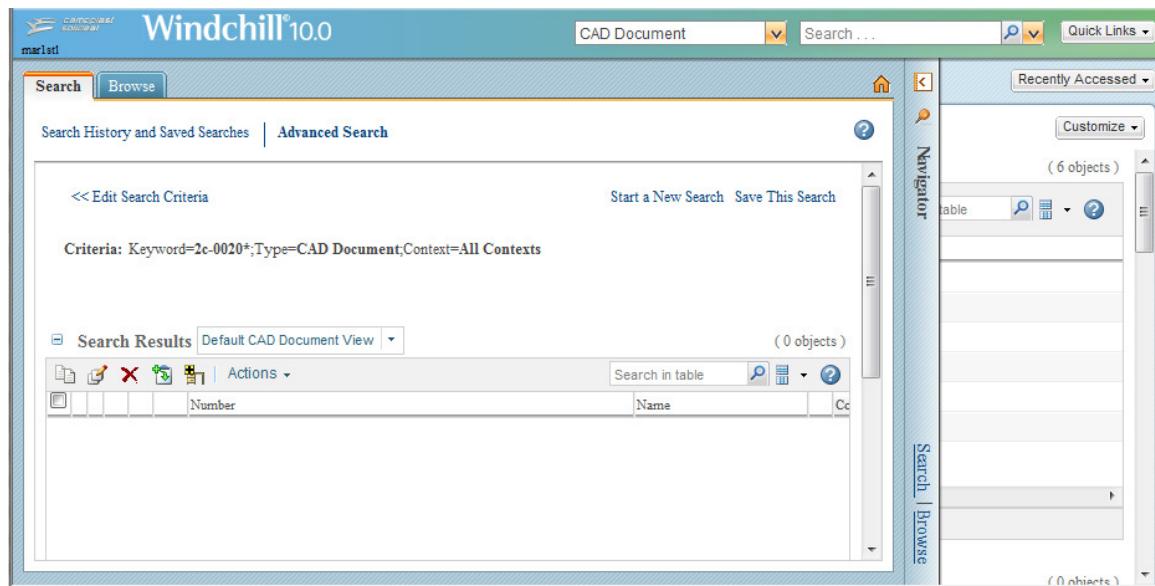
Search Issue

- Cannot find the document using simple search?

The simple search is a GOOGLE style search. This mean that the search use an Indexer system that look in any object characteristic.

So if the object have not been execute by the Indexer system, the search won't find anything.

In those case specified more Search Criteria within the Advance Search tab.



Module 6. Troubleshooting

Search Issue (continue)

- Cannot find the document using simple search?

To be sure to find any object within a specific number, you must use the advance search and use attribute criteria.

- 1 To navigate to the advance search use "Edit Search Criteria":

The screenshot shows two views of the search interface. On the left, under 'Search History and Saved Searches', there is a link 'Advanced Search' which is highlighted with a red box. Below it, the search criteria are listed: 'Criteria: Keyword=2c-0020*;Type=CAD Document;Context>All Contexts'. Under 'Search Results', there is a table with columns 'Number' and 'Name'. A red arrow points from the 'Advanced Search' link to the right-hand 'Advanced Search' dialog box. This dialog box has a blue circle with the number '2' above it. It contains fields for 'Keyword', 'Type' (with 'CAD Document' checked), 'Context' (with 'All Contexts' checked), and 'Criteria' (with 'Name' and 'Number' fields). The text 'Move your search criteria from "Keyword" to "Number" Criteria:' is overlaid in red next to the dialog box.

Tip:

- Attribute search looks for exact criteria!! So use the “*” as a wildcard to increase your search result.

Module 6. Troubleshooting

Search Issue (Continue)

- Search always keep last search criteria. So be aware of which criteria are activate or not! If you are looking for Document and it's not selected, the system won't look for that object type!

Type: Add

All Types EPM Document CAD Document Document

Context Options ▾

All Contexts TT-AR z-test-product UC-System UC-A052
 UC-i002 UC-i035 UC-A053 - FlexHaul UC-i032 - Scorpio
 UC-A027 UC-A015 UC-i001 UC-RU UC-Hardware
 UC-i019 UC-A044 - B14 UC-i043 - BOWIE UC-A040 - Demeter
 UC-A059 - DB AM Planters UC-A062 - Afterburner UC-A051 - Maximus
 UC-A061 - Kingsize UC-A036 - AgKit UC-i014 - Bison
 UC-A025 - HHP UC-A008 - Hercules Engineering System Product
 UC-A064 - Flexhaul Atlas TT-CO

Criteria: Add ▾

Name =

Number = 2c-0020*

Find: With all of these criteria ▾

Module 7

- Module 1. Introduction to the Windchill Environment
- Module 2. Locating Information
- Module 3. Viewing Information
- Module 4. Introduction to visualization
- Module 5. Managing Your Work
- Module 6. Troubleshoot
- Module 7. Icon Glossary & reference Document Link**

Module 7. Icon Glossary

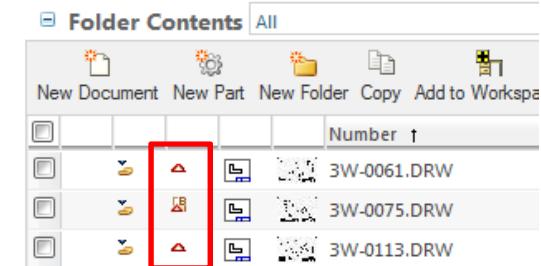
Icon definition



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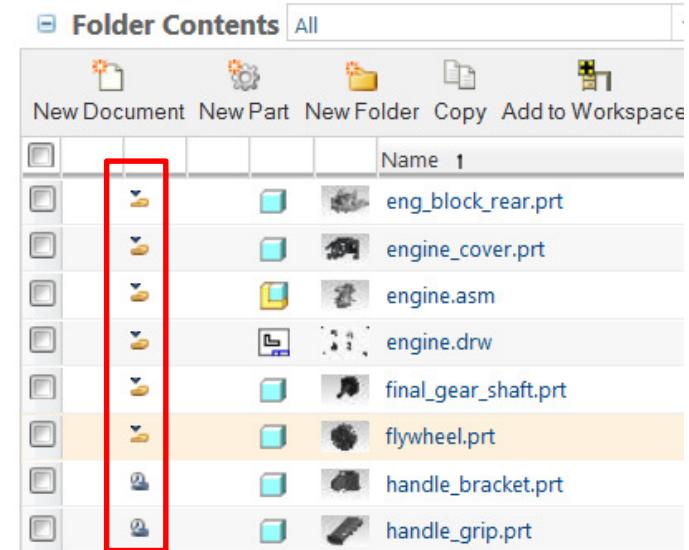
Change Status Icon:

- ⚠ ■ Affected Object, mean that this object is affected by a change a newest version is about to be release to replace this one
- ▣ ■ Resulting Object, mean that this object is a resulting of a change an will soon become the Production part.



Projects Status Icon :

- 📦 ■ Shared from PDM (Product or Library)
- ⌚ ■ Out of sync (mean that a new iteration of the object is available from PDM side)



Camso 2015

Module 7. Training an general information repository

Sharepoint PLM Portal



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Welcome to the PLM portal

Billboard Announcements

Title	Modified
Branding Strategy added to better integrate CAMSO logo into our design	11/24/2015 9:23 AM
New ProjectLink Training document is now available	11/24/2015 9:23 AM

[Add new announcement](#)

Training Video Links

URL
PLM training videos
CAD training videos

[Add new link](#)

Have an idea?

Subject	Created By	Replies	Last Updated
There are no items to show in this view of the "Team Discussion" discussion board. To add a new item, click "New".			

[Add new discussion](#)

Training Documents

Sub-Category	Name	Modified	Modified By	Category
Category : CAD (11)				
Category : PLM (22)				
Category : User Group (1)				
Sub-Category : (1) Other				
Other	PTC Camo User Group – Session 1	4/13/2015 8:49 AM	Martin St-Laurent	User Group

[Add document](#)

Links

Type	Edit	URL	Notes
		PTC Community	PTC Community Website
		PTC Support Portal - Knowledge base	PTC support site

[Add new link](#)

<https://intranet.camso.co/sites/portals/PLM/SitePages/MainPage.aspx?InitialTabId=Ribbon%2ERead&VisibilityContext=WSSTabPersistence>

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THE END

Introduction

Change Management



Problem Report (PR)

- Capture potential problems and enhancements

Change Request(CR)

- Initiates the change process
- Collect the affected objects
- Drive the decision to pursue change

Change Notice (CN)

- Execute the Change
- Manages new objects and new objects versions

