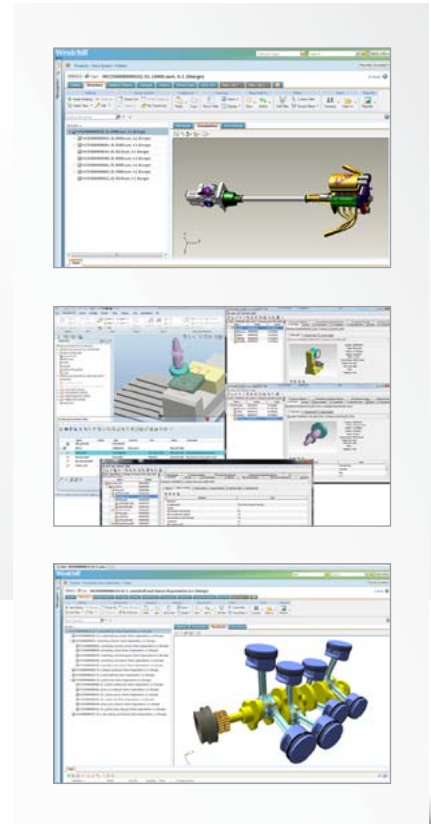


Windchill® Users Quick Start Guide



MAXIMIZE YOUR USER EXPERIENCE



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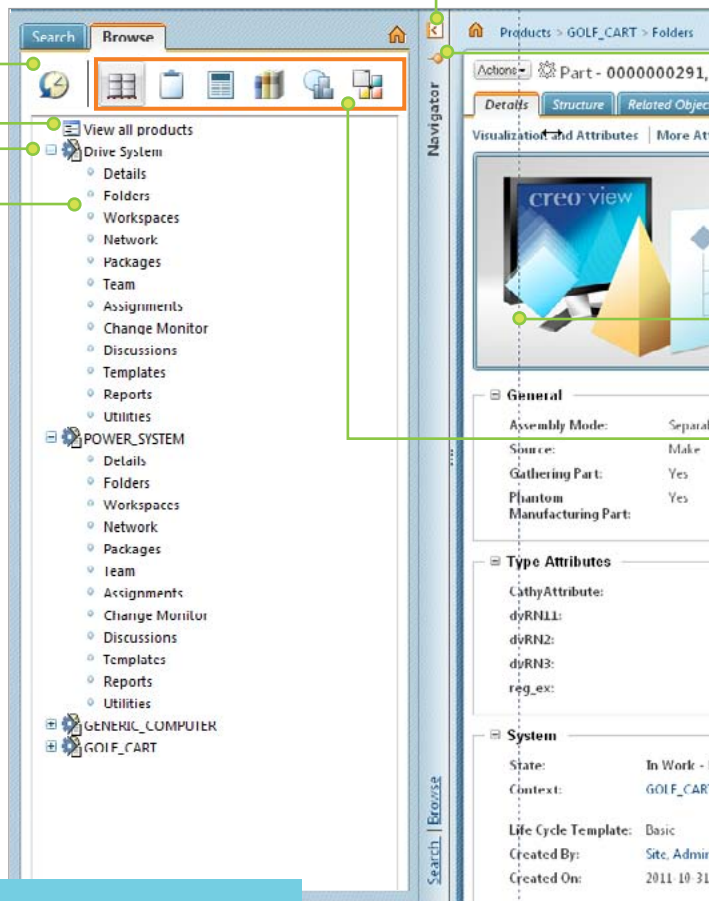
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Browsing in the Navigator

Recently visited context.

All contexts of a selected type.

Expand context to access pages specific to that context.



Open and close the Navigator.

Display the Navigator alongside the rest of the page by pinning it in place.

Resize the Navigator as needed.

Context type icons.

- Products
- Projects
- Changes
- Libraries
- Organizations
- Sites

Did You Know?

If you open any page within a context (for example, the information page of an object), it is added to the Navigator's Recently Visited list. To find contexts not already in your Recently Visited list, either select the icon for that context type and then hit "View all," or use [Search](#).

Searching in Windchill

Select one or more object types (Part and Document are chosen here) and enter your search or select a recent search (such as **Changes created by me** or **Keyword-gasket; Type=Part**).

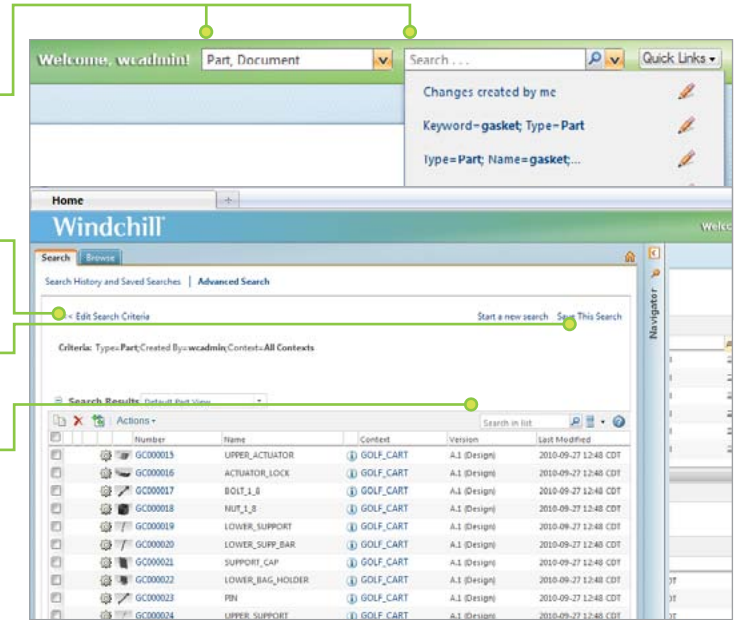
Easily access search results from inside the Navigator by clicking **Edit Search Criteria**. Your search results are retained even after the Navigator is closed.

Click **Save This Search** to add the search to your **Saved Search** list and to the keyword Search dropdown, where it remains until replaced by more recent searches.

Objects matching your search appear in the Search Results [table](#).

Did You Know?

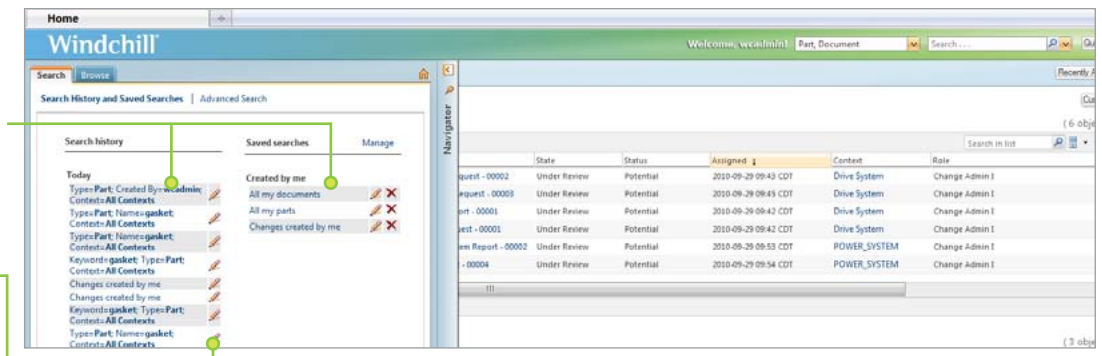
Your search results are retained even when the Navigator is closed.



Search History and Saved Searches

Perform a saved or past search.

Modify a saved or past search before executing it.



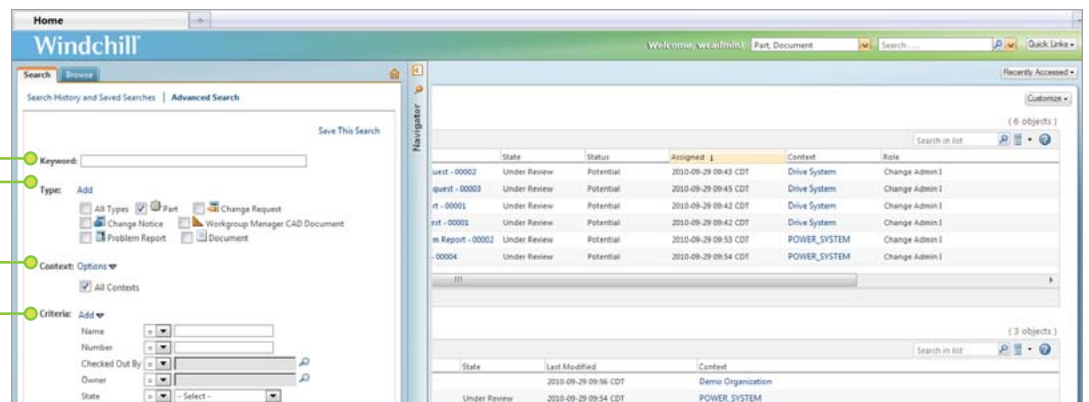
Advanced Search

Enter a Keyword to find matching criteria anywhere (for example, in a document's content or attributes).

Object **Type** or types. Click **Add** if your type doesn't appear.

Limit your search to one or more contexts.

Select specific attribute criteria if a keyword isn't enough. Then search for **All** or **Any** of your entered criteria.



Your Information: The Home Page and Tables

Home

Commonly used functions, such as user preferences, appear from **Quick Links**.

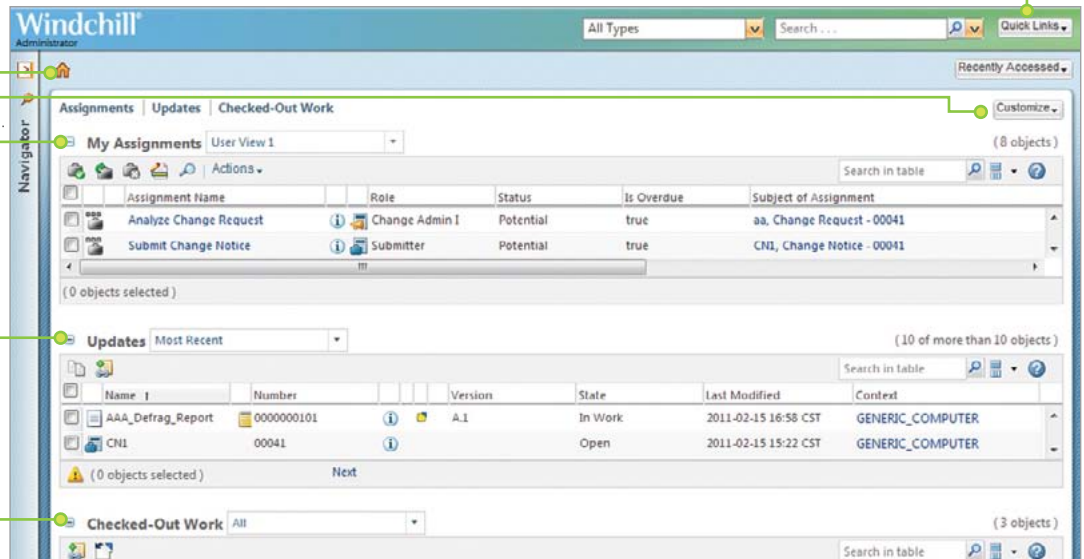
Takes you to your Home page.

Customize which tables appear on your Home page.

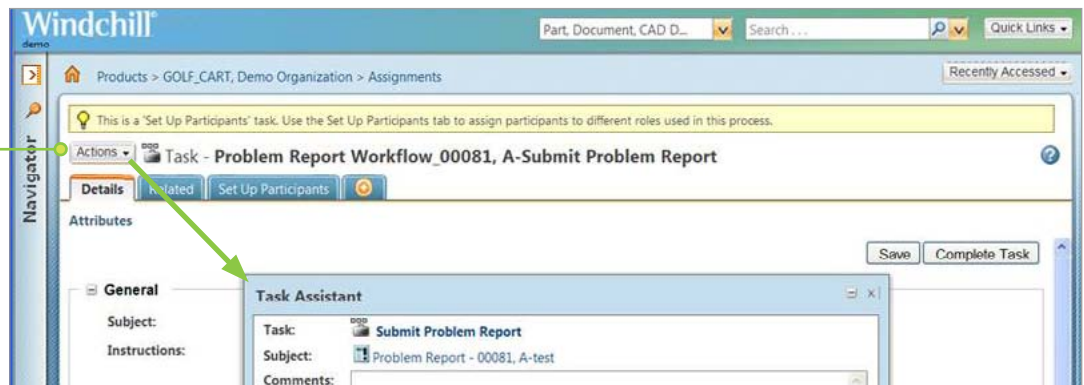
Work items you are responsible for, either as an owner, assignee, or resource.

Objects you recently created or modified.

Objects you currently have checked out.



Click **Launch Task Assistant** to retain task comments without returning to the task form.



Did You Know?

You can click **Actions>Export List to File>Export List to XLSX** to export your search results to a Microsoft® Excel® file. If you deploy the new Windchill Print Services module, you can click **Actions>Batch Print** to send the objects you select to a Windchill server-configured printer.

Tables can be modified using a column's drop-down menu and saved for later reuse.

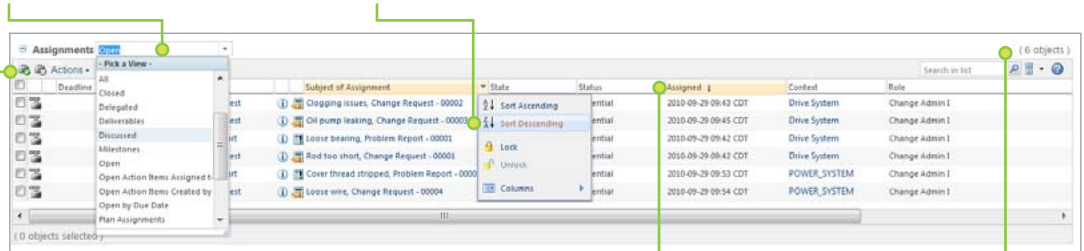
To perform an action on an object in a table, simply right-click over that row.

To open a link in a new window or tab, right-click and hold the CTRL button.

Tables

Choose or save your view.

Further customize your table's view by clicking on the small arrow that appears when you roll over a column header to **Sort, Lock, and hide columns**.



Perform specific actions on objects in your tables by clicking these icons, or by choosing from the **Actions** menu, or by right-clicking on any row.

Click a column header to sort the table by that column.

Display all objects loaded in the table that match your search.

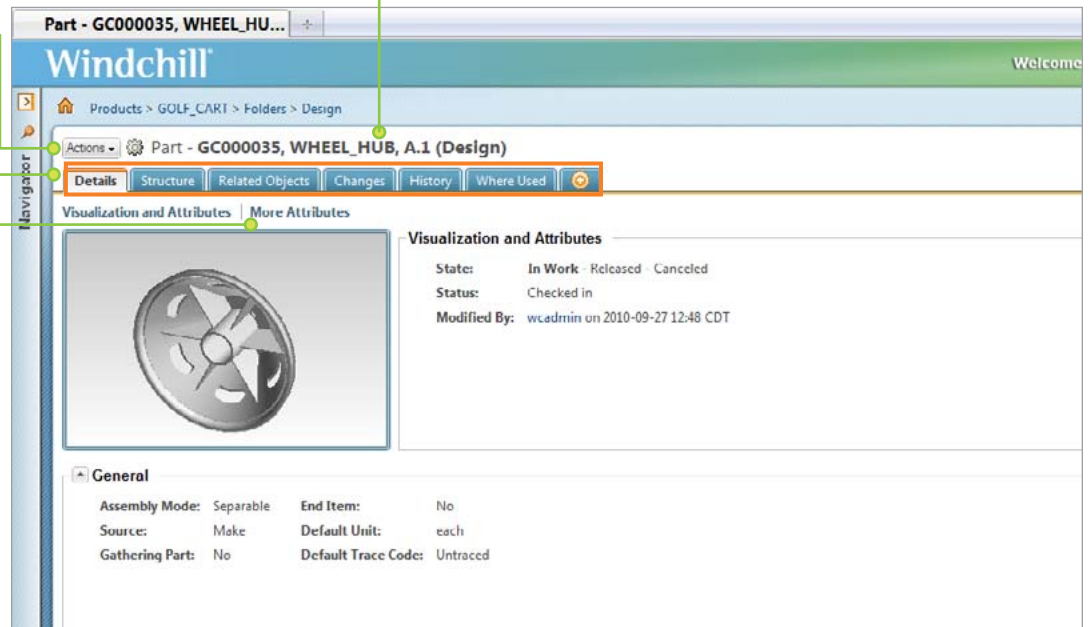
Information Pages

The document's identifying information such as its number, name and version.

Actions you can perform on the object.

Object attributes and information tables for the object are arranged in tabs.

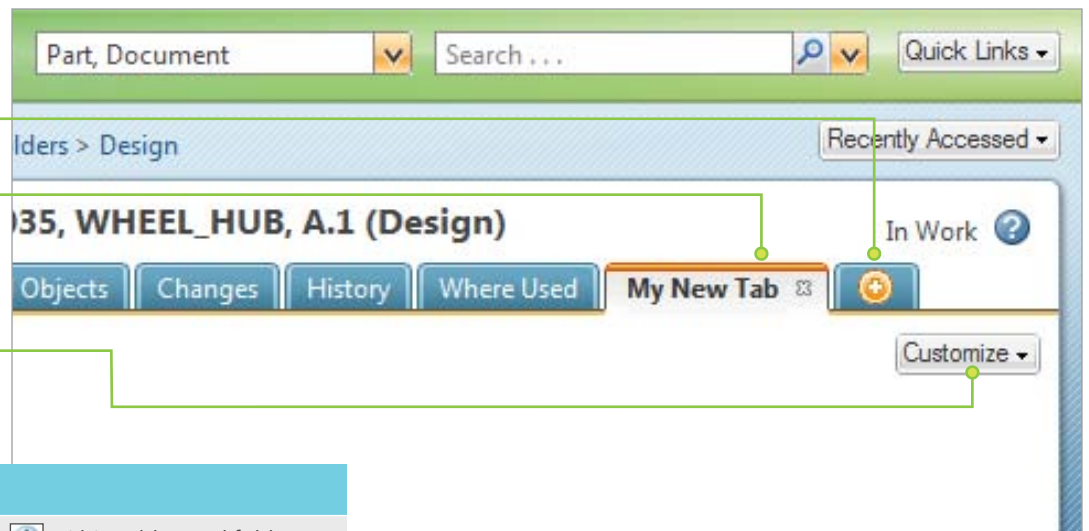
Drag-and-drop the page anchors on the top of the pane to reorder the information tables.



Create a new tab.

Right-click to rename or remove a tab you have created.

Add new information tables to your new tab.

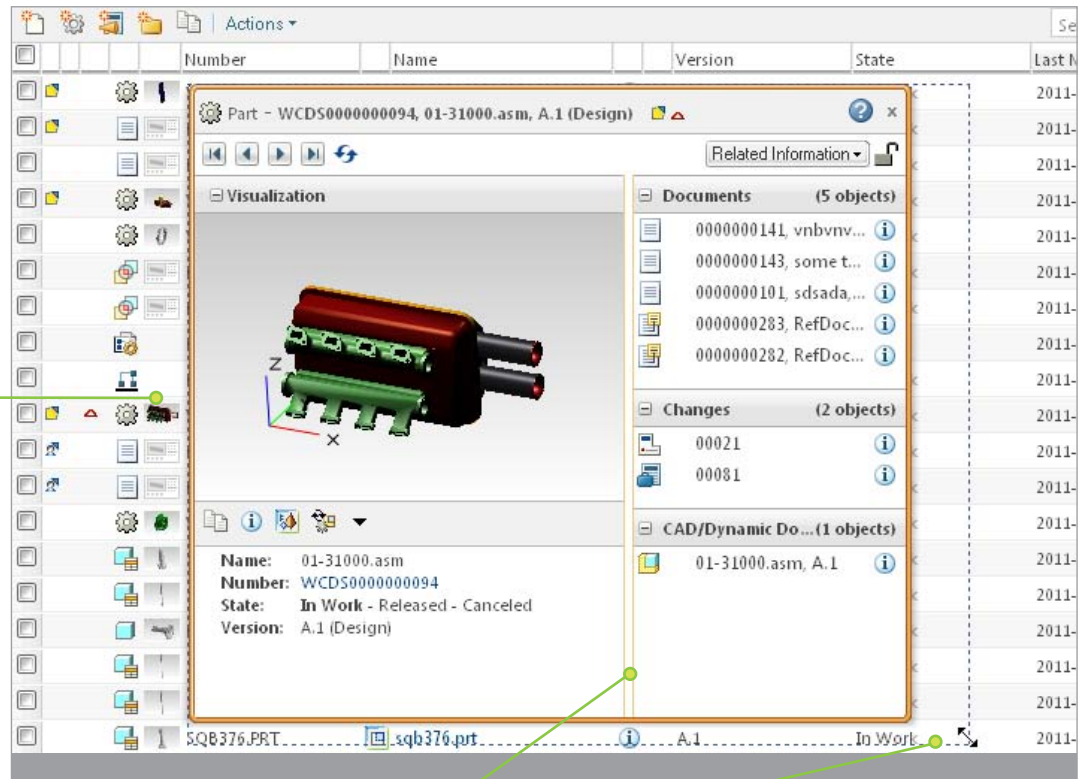


Did You Know?

Click the **View Information** icon  within tables and folders to view an object's information page.

Information Pages

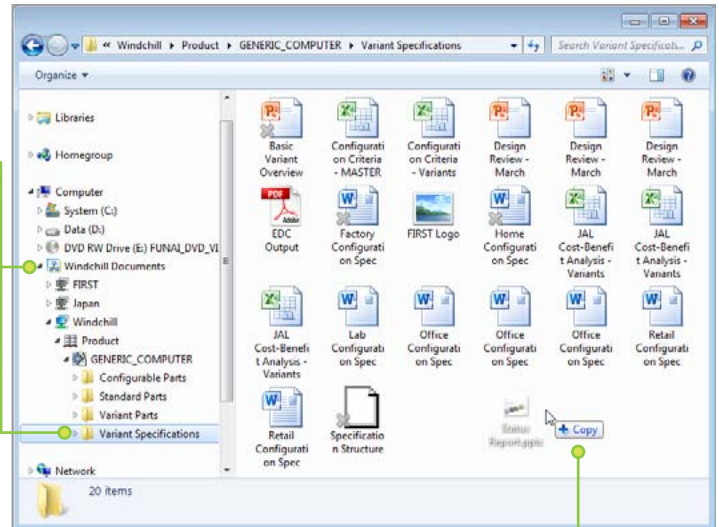
Hover over an object's thumbnail to navigate, see additional relationship information and take action on the object.



Resize either the window or the panes to see as much or as little as needed.

Windchill Documents: Integration with Windows Explorer

Find and manage your documents in Windchill directly from Windows Explorer's **Windchill Documents** node. From here, you can navigate directly through a secure connection to folders in your system.

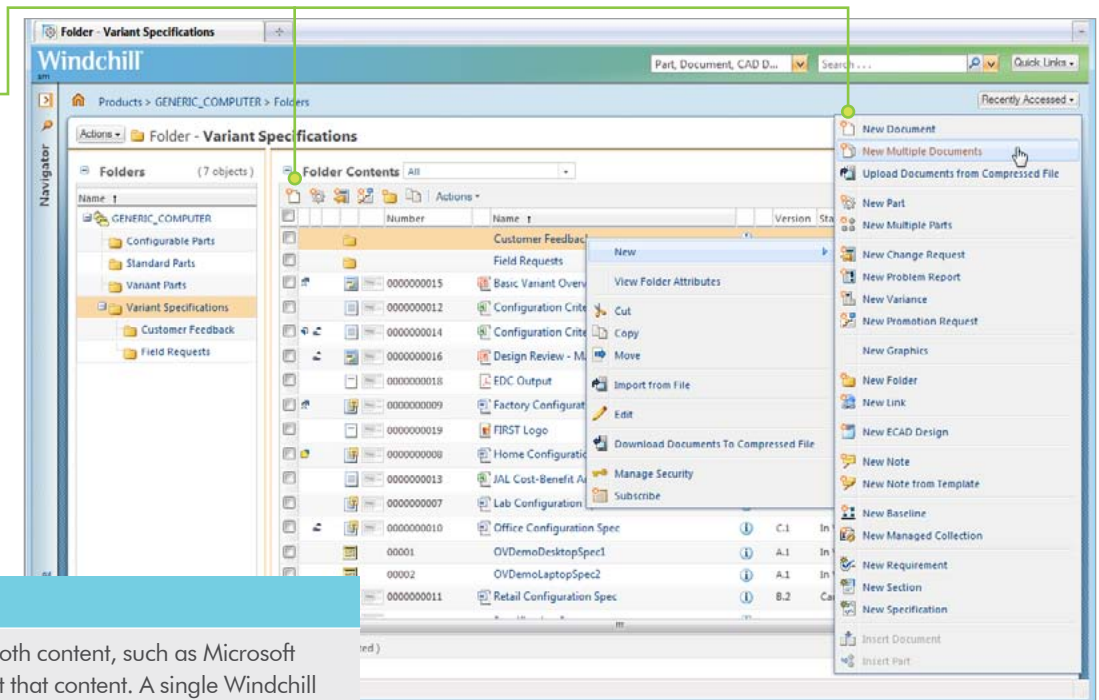


Drag-and-drop documents here to add them to Windchill.

Did You Know?

To see Windchill documents in Windows Explorer and in Microsoft Office applications, download and install Windchill Desktop Integration, available from [Quick Links > Software Downloads](#), and connect to the Windchill server.

Create a new document either by clicking the **New Document** icon or choosing New Document from an actions menu.



Did You Know?

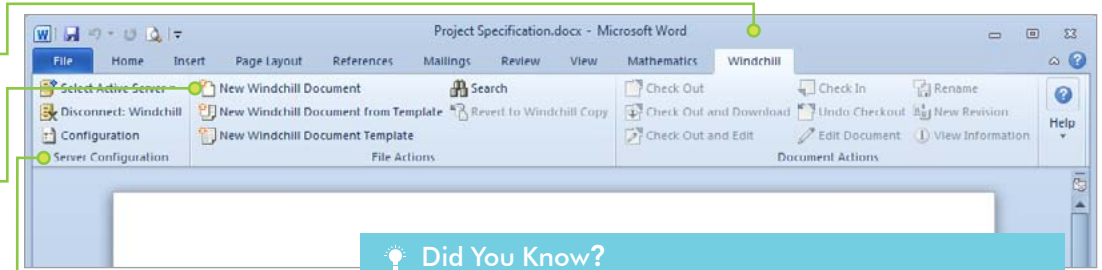
Windchill documents contain both content, such as Microsoft Office files, and metadata about that content. A single Windchill document can contain related attachments as well as the **primary content**.

Windchill Documents: Integration with Microsoft Office

Perform a variety of Windchill actions from within Microsoft Office.

Check in or add a document directly from Microsoft Office applications.

Manage Windchill Server connections.

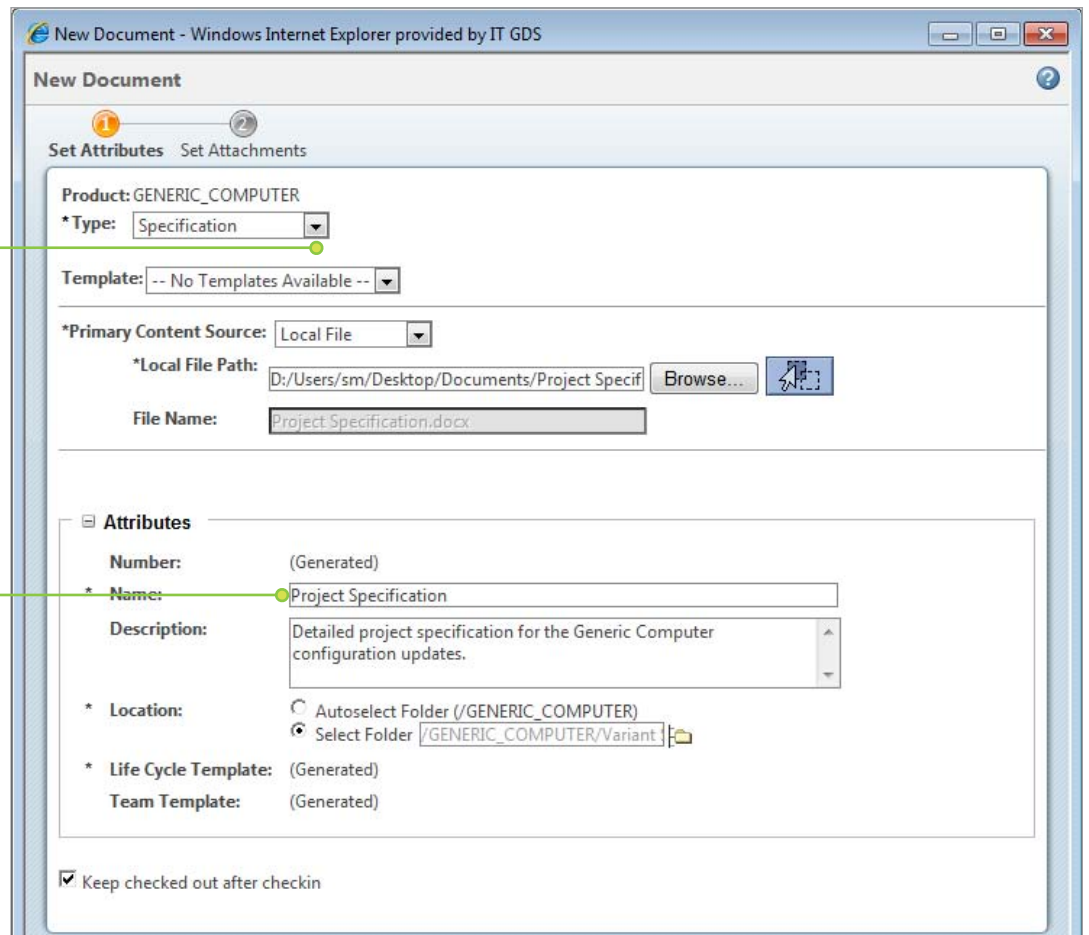


Did You Know?

If you install Windchill Desktop Integration, you can open and save new Windchill documents directly from the Office application's Open and Save As menu.

Select the type of document.

Identifying information, such as the document's name and description.

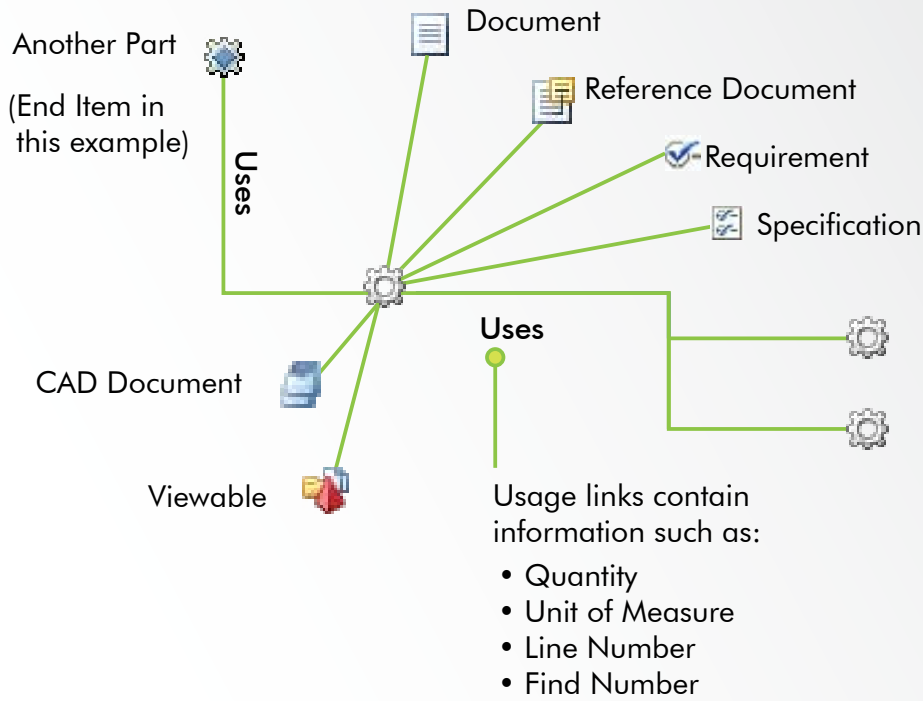


Confirmation windows with embedded links inform you of server actions, and automatically disappear.



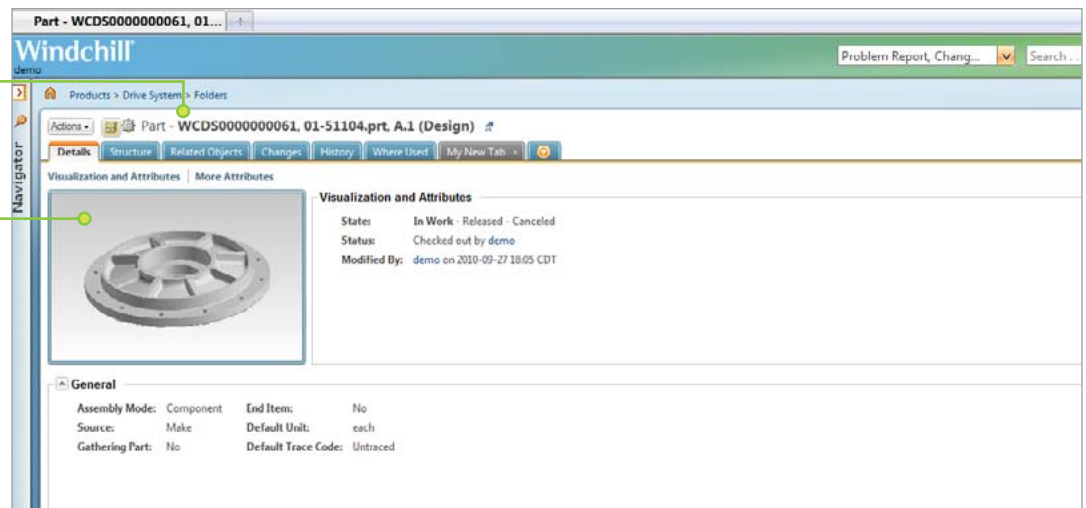
Windchill Parts

Part Relationship Diagram



Part's identification information.

Visual representation of the part.



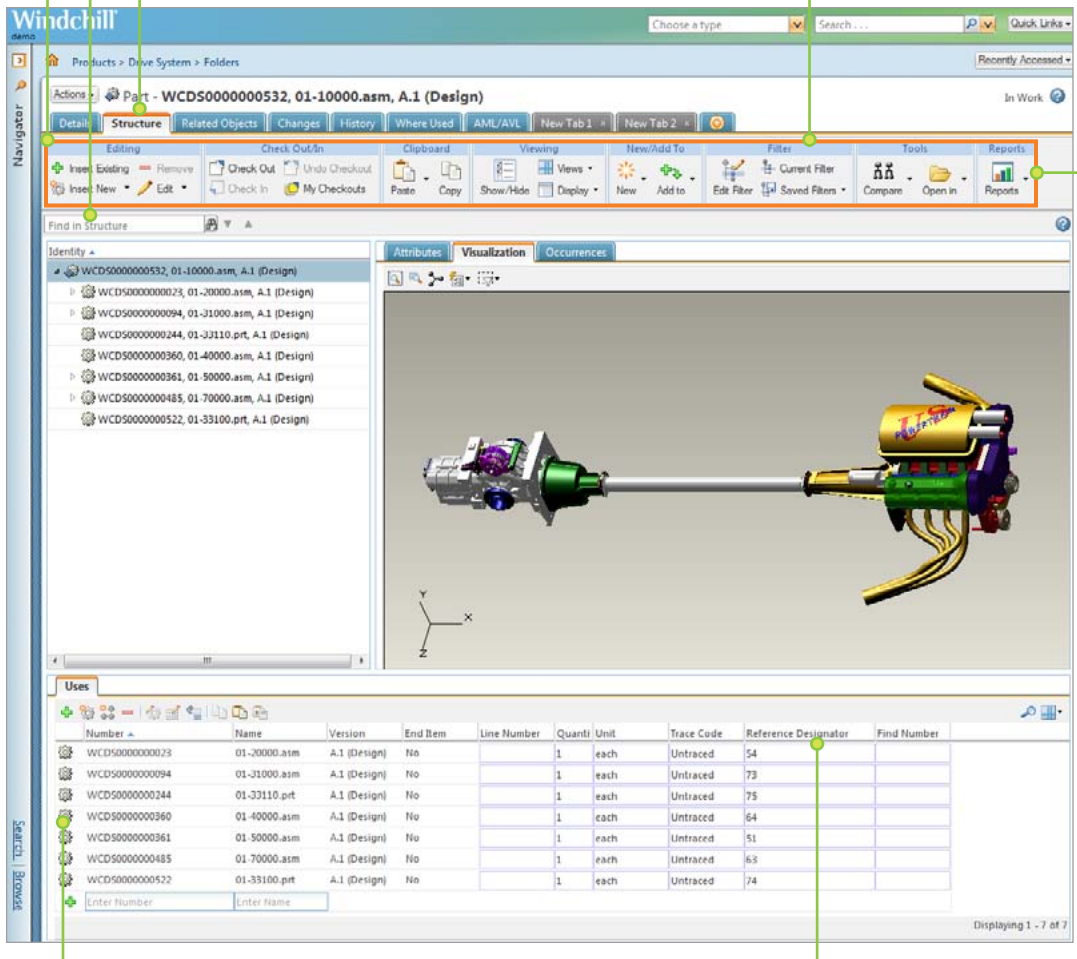
Editing Windchill Part Structures

The actions toolbar contains frequently used viewing, editing, and analysis functions.

Find parts in the product structure. The structure is expanded to reveal matching parts within subassemblies and allows easy navigation from one match to the next.

View and edit the part structure, including related CAD data and documents, and usage information.

Use **Configuration Specification**, **Attributes** and **Spatial Criteria** to display the desired product structure configuration.



Icons within the action ribbon.

- Compare to Part Structure
- Compare to CAD Structure
- Edit Filter
- Current Filter
- Saved Filters
- Expand All Levels
- Show/Hide Occurrences
- My Checkouts
- Edit Usage Attributes
- Edit Common Attributes

In the Uses tab, enter a partial part number or name and the system will auto-suggest matching parts that you can select to add.

Directly access, view, and edit information stored in the Occurrences tab.

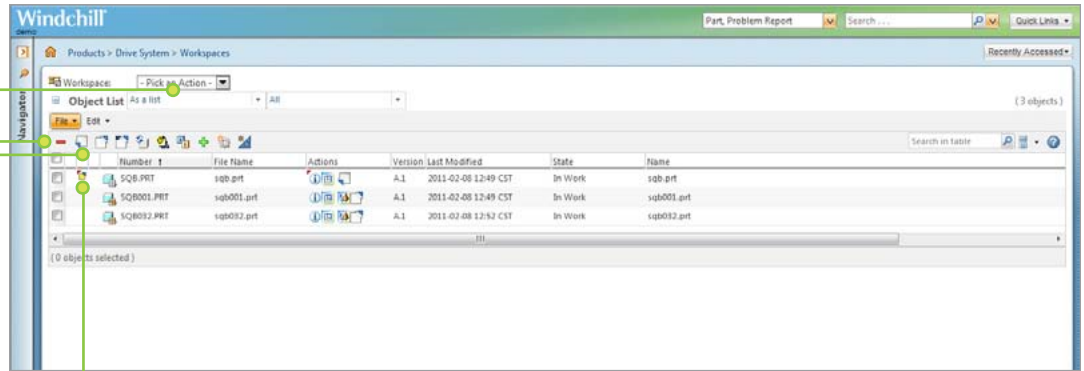
Did You Know?

To change the panel display on the **Structure** tab, right-click anywhere in the **Structure** tab or click **Display** in the actions toolbar.

CAD Data Management: Workspaces and Model Structures

Select and configure custom table views.

Apply workspace actions to single or multiple objects.



Action Icons

- Check In
- Check Out
- Undo Checkout
- Update

Status Glyphs

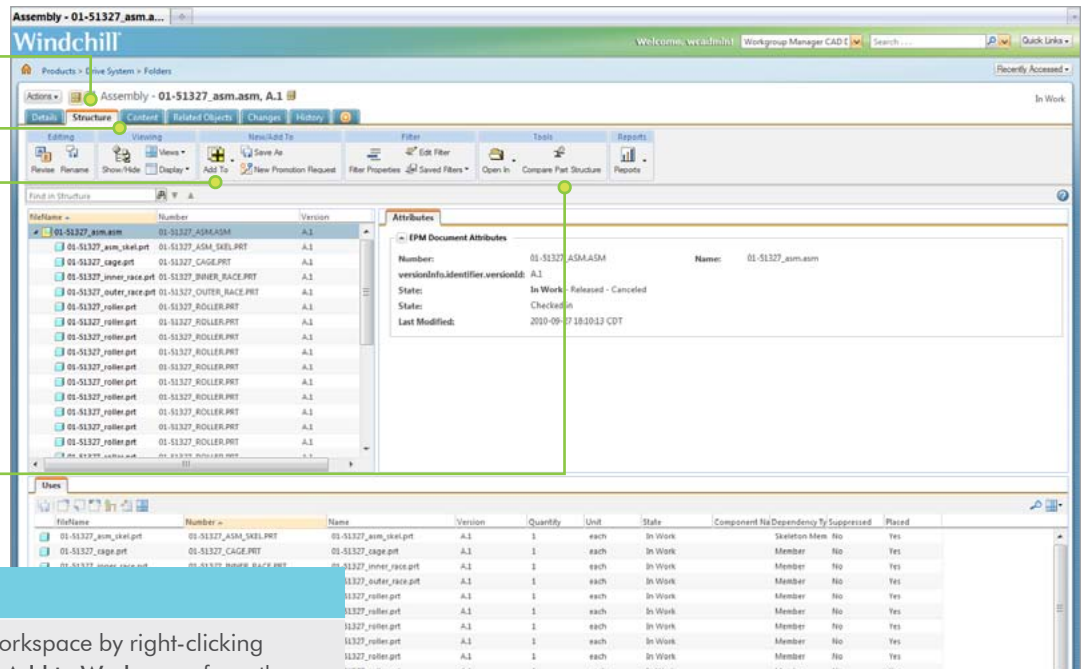
- Shared to a project
- Shared from PDM
- Checked out from PDM
- Locked
- Checked out by you
- Checked out by you in another workspace
- New
- Checked out by another user
- Checked out to a project
- Another Iteration is checked out by you
- Another Iteration is checked out by another user
- Modified in workspace and upload needed
- Modifications uploaded
- Modified and not eligible for upload

View a model's structure.

Adjust structure view to show additional attributes and Show/Hide related parts.

Add assembly to workspaces or baselines.

Compare the model and its related part structure.



Did You Know?

You can add an object to your workspace by right-clicking the object and selecting **Add to>Add to Workspace** from the commonspace's Search Results or the Folder Browser.

CAD Data Management: Comparing Structures

From the top screen, click **Compare Part Structure** to launch the Structure Compare tool from either a CAD structure or Part Structure for a side-by-side structure comparison.

Click the **Build multi-level Part structure** icon to propagate (build) structure changes from the left structure to the right structure.

View the specific differences between the two structures by clicking the up and down arrows.

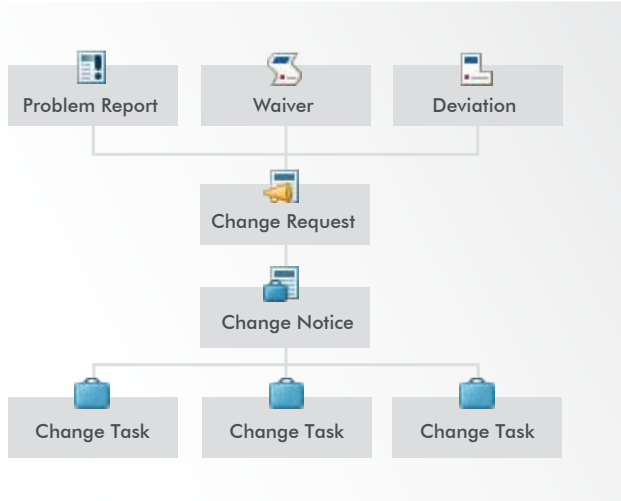
Differences between the two structures appear with a red font.

Lower-pane tabs provide additional attribute, usage and related-object information.

Number	Name	Version	Identity	Quantity	Unit	Build Status
01-512124.PRT	01-512124.prt	A.1	WCDS0000000615, 01-512124.prt, A.1 (Design)	1	each	Completed
01-512124.PRT	01-512124.prt	A.1	WCDS0000000615, 01-512124.prt, A.1 (Design)	1	each	Completed
01-512124.PRT	01-512124.prt	A.1	WCDS0000000615, 01-512124.prt, A.1 (Design)	1	each	Completed
01-512124.PRT	01-512124.prt	A.1	WCDS0000000615, 01-512124.prt, A.1 (Design)	1	each	Completed
01-512141.PRT	01-512141.prt	A.1	WCDS0000000728, 01-512141.prt, A.1 (Design)	1	each	Completed
01-51219.PRT	01-51219.prt	A.1	WCDS0000000271, 01-51219.prt, A.1 (Design)	1	each	Completed
01-51219.PRT	01-51219.prt	A.1	WCDS0000000271, 01-51219.prt, A.1 (Design)	1	each	Completed
01-51219.PRT	01-51219.prt	A.1	WCDS0000000271, 01-51219.prt, A.1 (Design)	1	each	Completed
01-51231.PRT	01-51231.prt	A.1	WCDS0000000104, 01-51231.prt, A.1 (Design)	1	each	Completed
01-512310.ASM	01-512310.asm	A.1	WCDS0000000498, 01-512310.asm, A.2 (Design)	1	each	Completed
01-51296.PRT	01-51296.prt	A.1	WCDS0000000130, 01-51296.prt, A.1 (Design)	1	each	Completed
01-51297.ASM	01-51297.asm	A.1	WCDS0000000434, 01-51297.asm, A.2 (Design)	1	each	Completed
01-51297A.PRT	01-51297a.prt	A.1	WCDS0000000734, 01-51297a.prt, A.1 (Design)	1	each	Completed
01-51297A.PRT	01-51297a.prt	A.1	WCDS0000000734, 01-51297a.prt, A.1 (Design)	1	each	Completed
01-51297A.PRT	01-51297a.prt	A.1	WCDS0000000734, 01-51297a.prt, A.1 (Design)	1	each	Completed
01-51297A.PRT	01-51297a.prt	A.1	WCDS0000000734, 01-51297a.prt, A.1 (Design)	1	each	Completed
01-51297A.PRT	01-51297a.prt	A.1	WCDS0000000734, 01-51297a.prt, A.1 (Design)	1	each	Completed

Windchill Change Management

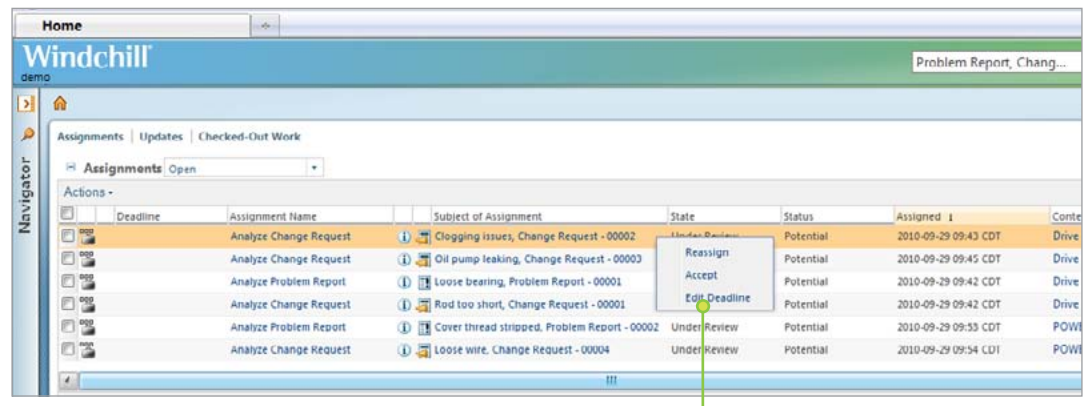
Change workflow



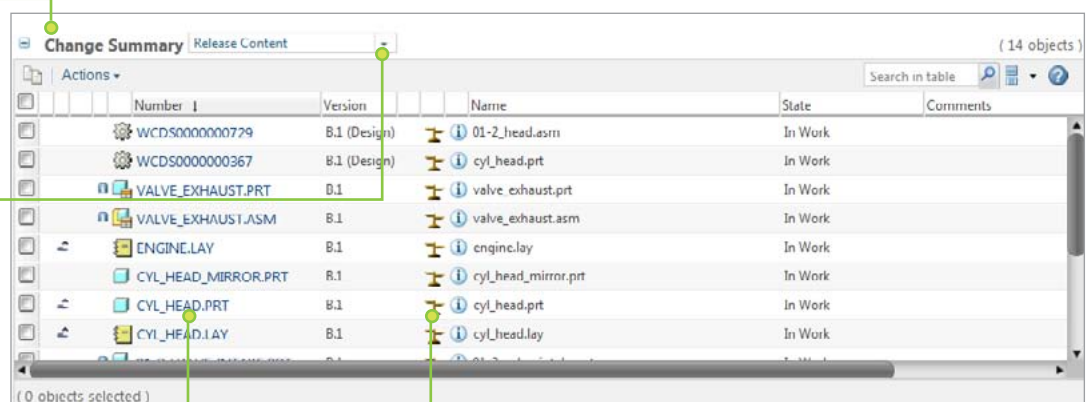
Change terminology in Windchill

Item	Description	Required
Problem Report	Define an issue or opportunity	Optional
Deviation	Acceptance of planned departure from configuration before part is built	Optional
Waiver	Acceptance of non-conformance after part has been built	Optional
Change Request	Define business and technical justification for the change.	Optional (with preference)
Change Notice	Define plan for data to be Released	Yes
Change Task	Assign, track and review data and work against the Change Notice	Yes (at least one)

Assess your change tasks directly from the Assignments table on your **Home** page through the right-click actions menu.



Use the **Change Summary** table to easily see all the data on the **Change Notice** without having to navigate to each **Change Activity** separately.



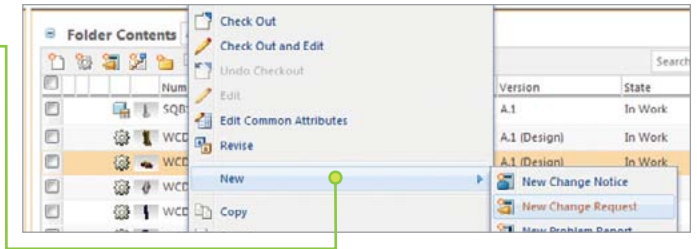
Additional default table views include views for **Affected Parts** and **Change Intent**. Additionally, you may customize your view to meet your organization's business needs.

Display Parts, CAD Documents, Documents and other items on the change.

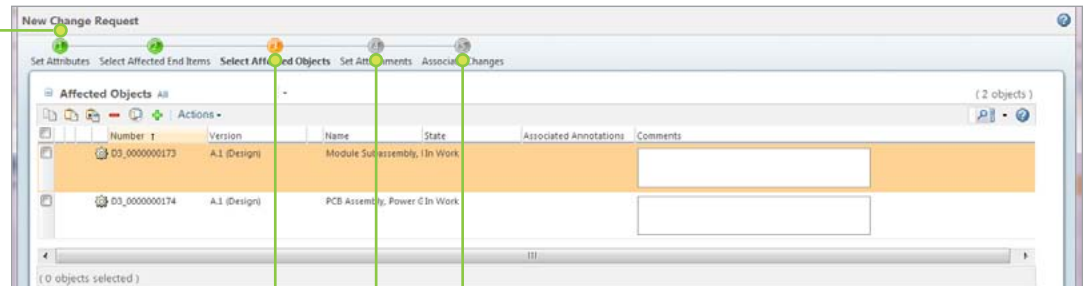
Easily compare information.

Windchill Change Management: Create New Change Request

Start a New Change Request by right-clicking on the affected object and choosing **New>New Change Request** from the actions menu.



Enter the Name, Description, Proposed Solution and other attributes.



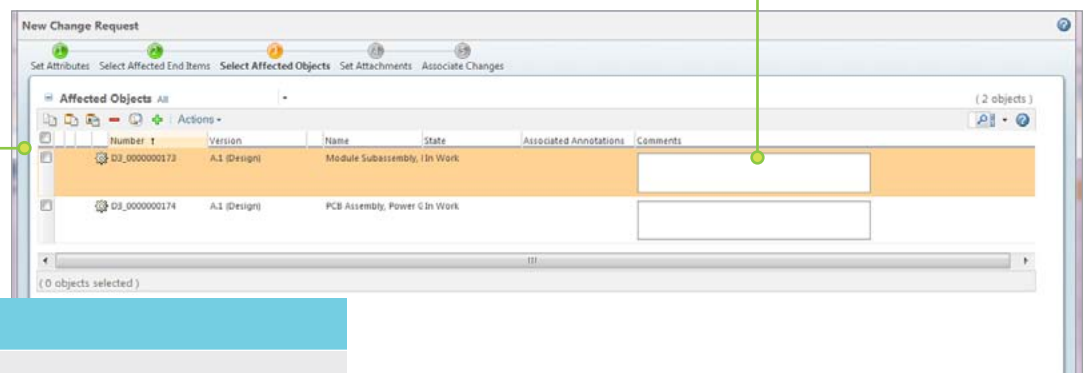
Objects that are either impacted by or referenced by the Change.

Business or technical justifications (e.g., files, links, etc.).

Related Changes, such as Problem Reports, Deviations and Waivers.

Comments for Affected Objects, such as why this item was added (this is separate from Disposition Comments).

Add additional Affected Objects with Paste or Add, or use Collector to find related items.



Did You Know?

All tables in the **Changes** context have create actions, allowing you to quickly start changes without additional navigation.

Glossary

New to Windchill? Here are some important terms and concepts you should know:

Actions: Performing a task against an object or table in Windchill is called an **action**. Actions are available from Icons on a table's toolbar, the Actions menu on information pages and toolbars, and right-click Actions menu on rows in tables.

CAD documents: CAD files (for example, models or drawings) are managed in Windchill as CAD documents. CAD documents and their structures can be associated to Windchill parts. A CAD document is the CAD designer's view of the design, and a Windchill part is the rest of the enterprise's view of the same design. For example, AML/AVL information is only associated with the corresponding Windchill part. This associative relationship enables CAD structures to automatically build part structures. New with Windchill 10.0 is top-down design (TDD), allowing part structures to build CAD structures.

Change Management: Windchill functionality that manages issues and improvements to products and processes via a robust, closed-loop system. Changes can be identified, tracked and viewed across the enterprise. The entire enterprise can then assess how these changes in product data will affect different teams.

Commonspace: A collective term for the data that is not in a user's workspace. The **Folder Browser** is Windchill's equivalent of the commonspace in Pro/INTRALINK®.

Contexts: Contexts can be thought of as separate data vaults. There are three main types of contexts in Windchill:

- **Products:** A product is typically thought of as the physical item manufactured and sold to customers. Windchill expands the concept of a product to include the environment in which users collaborate to develop parts.
- **Libraries:** A library is typically a vault for common parts, models and documents.
- **Projects:** A project is a virtual location into which you invite people to collaborate as a project team. Projects are ad-hoc collaboration spaces, as opposed to Products and Libraries, which allow you more control of product development processes.

Information Pages: An information page is used to access information about, and perform actions on, a particular object.

Objects: An object is a generic name for business data that is added to, and managed in, the Windchill system. For example, a part, a CAD document, and a Windchill document are all Windchill objects.

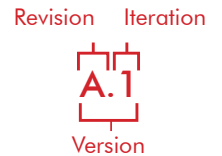
Occurrences: An occurrence in Windchill is a database object that stores information about one named usage of a part within a part structure.

Roles: A role determines the access privileges that users have and what they are allowed to do within contexts. Manager, reviewer, observer, or approver are all examples of roles.

Tables: Information about multiple objects is commonly presented in tables. Because some tables can contain large quantities of data, you can define a **view** to display just the objects and columns that you want to see.

Versions, Revisions, and Iterations:

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



Workspace: A workspace is a private area where you can manage your CAD work and perform CAD data management operations.

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