

windchill[®] 13

Quick Start Guide

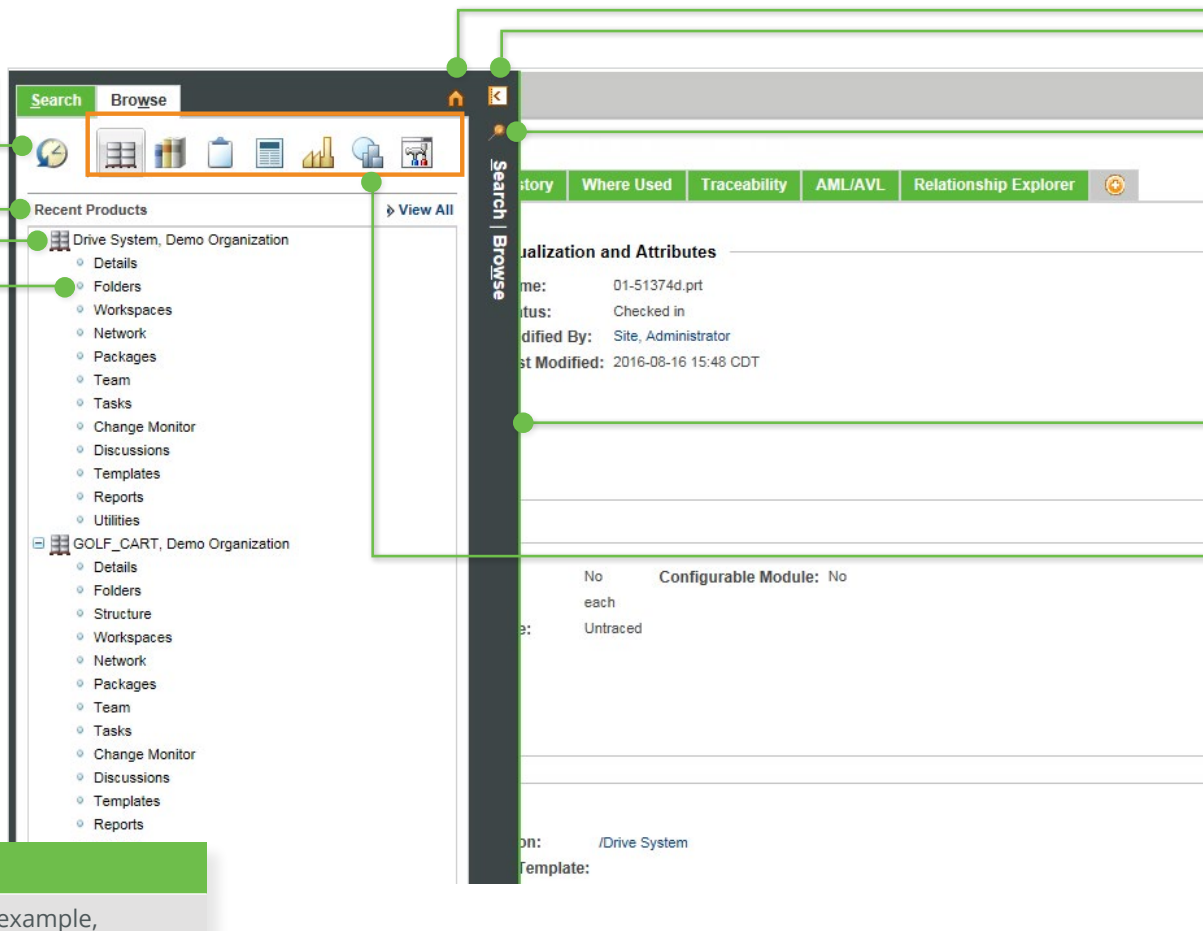
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Recently visited context

All contexts of a selected type

Expand context to access pages specific to that context.



Takes you to your Home page.

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
- Libraries
- Projects
- Changes
- Organizations
- Sites

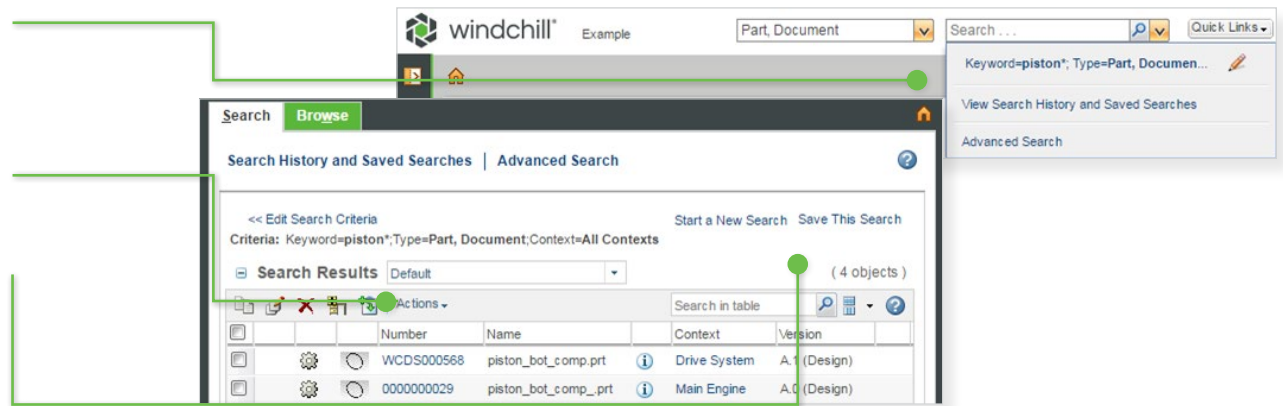
Did You Know?

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](#).

Global search applies a keyword search across all contexts. You can select which object types to include, or select a recent search.

Objects matching your search appear in the **Search Results** table. You can use the **Actions** menu to perform actions on multiple objects at once.

Click **Save This Search** to add the search to your **Saved Searches** list.



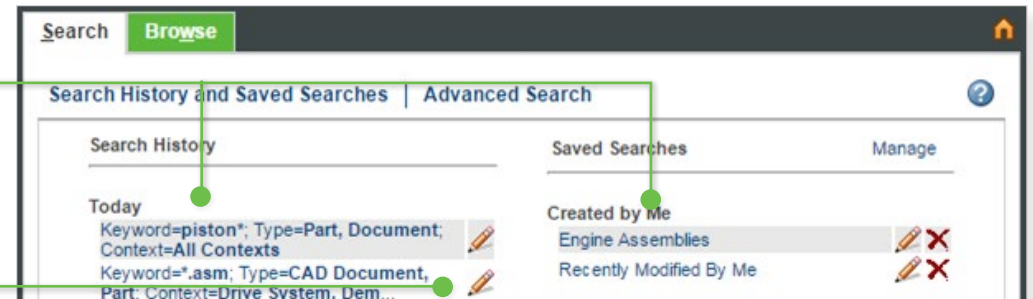
Did You Know?

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

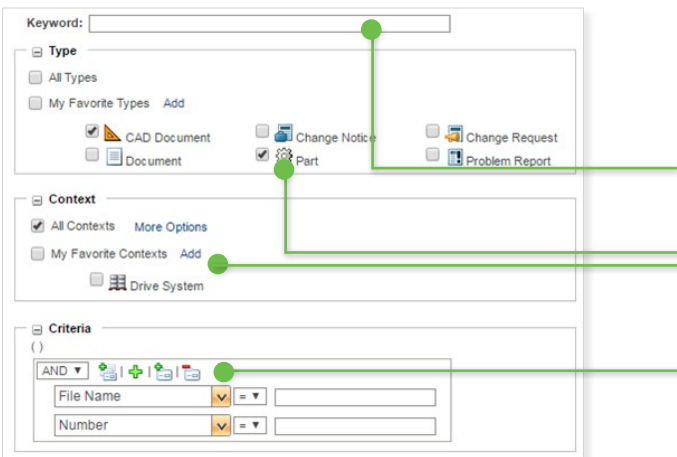
Search History and Saved Searches

Perform a recent or saved search.

Modify a recent or saved search before executing it.



Advanced Search



Keywords are applied towards all attributes and document content (if indexing is enabled). You can use wildcards to extend your search.

Filter your search by one or more object types, contexts, or context folders.

Select specific attribute criteria. The criteria that is available depends on the object types selected. If no value is provided, the criteria is ignored.

Did You Know?

You can click **Actions > Export List to File > Export Importable Spreadsheet** 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.

Your Information: The Home Page and Tables

Takes you to your **home page**.

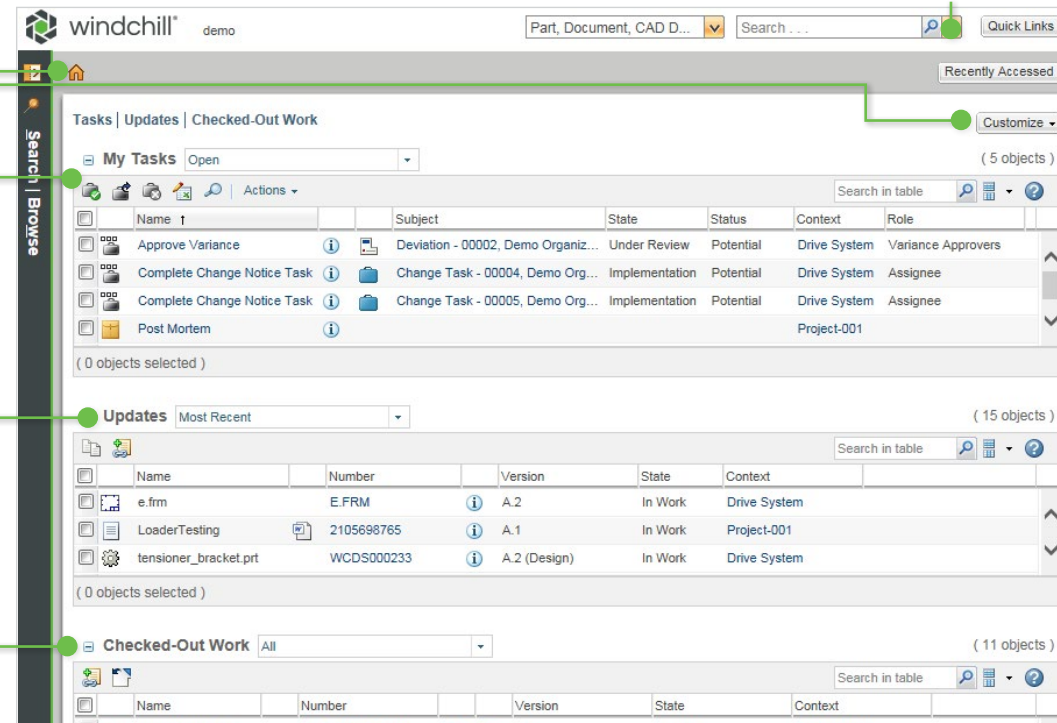
Customize which tables appear on your **home page**.

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

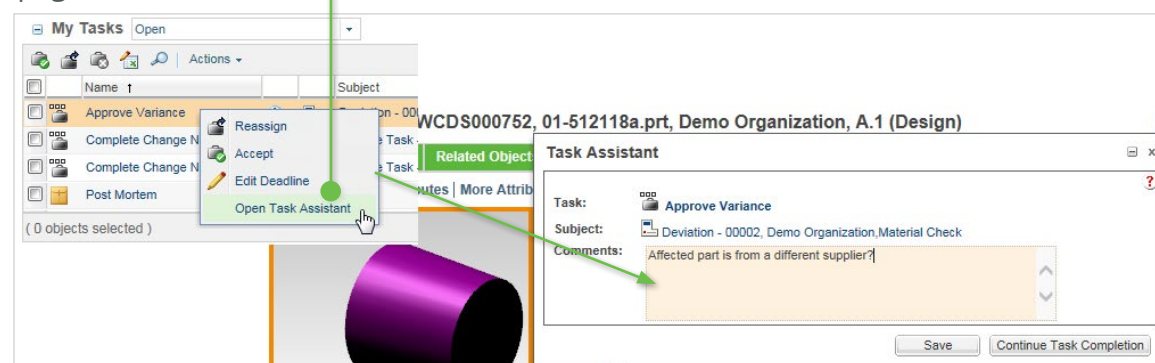
Objects you recently created or modified.

Objects you currently have checked out.

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



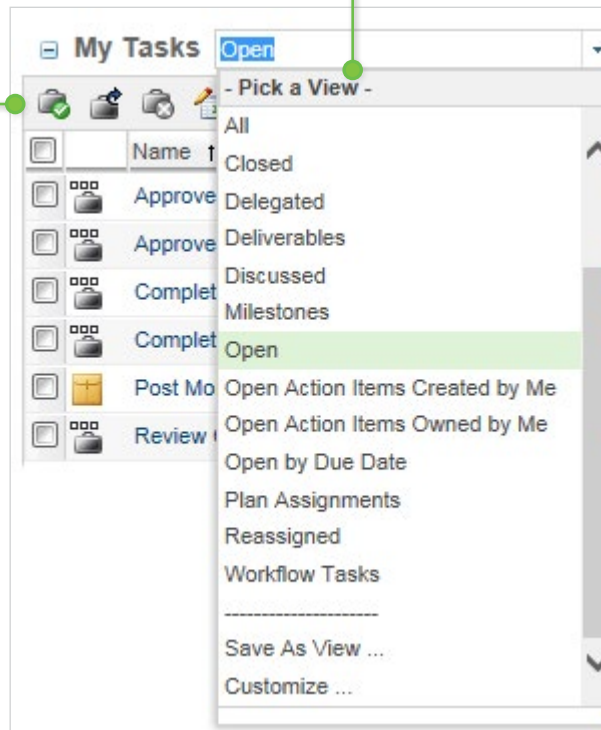
Use the **Task Assistant** to enter comments for the the task while navigating to different pages in Windchill.



Your Information: The Home Page and Tables

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.

Choose or save your view.



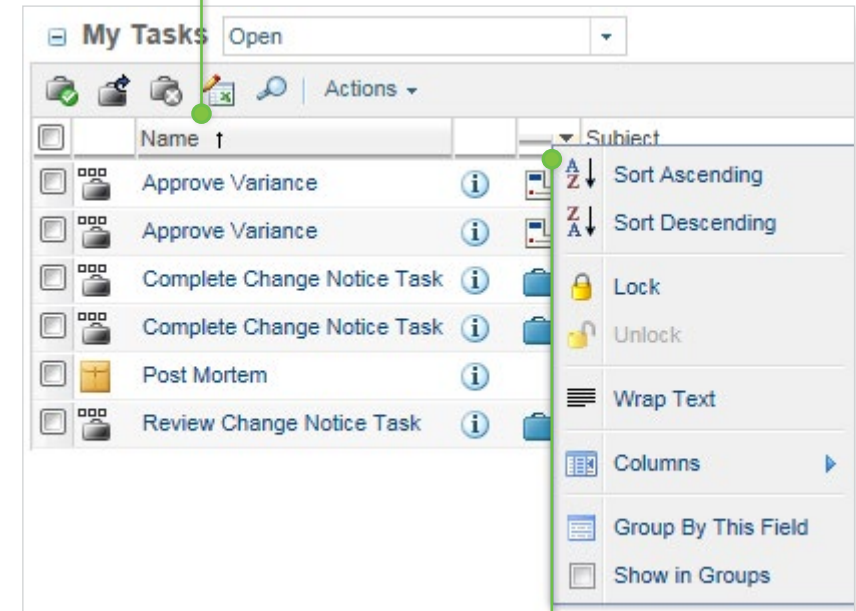
Did You Know?

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.

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



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.

Information Pages

Actions you can perform on the object.

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

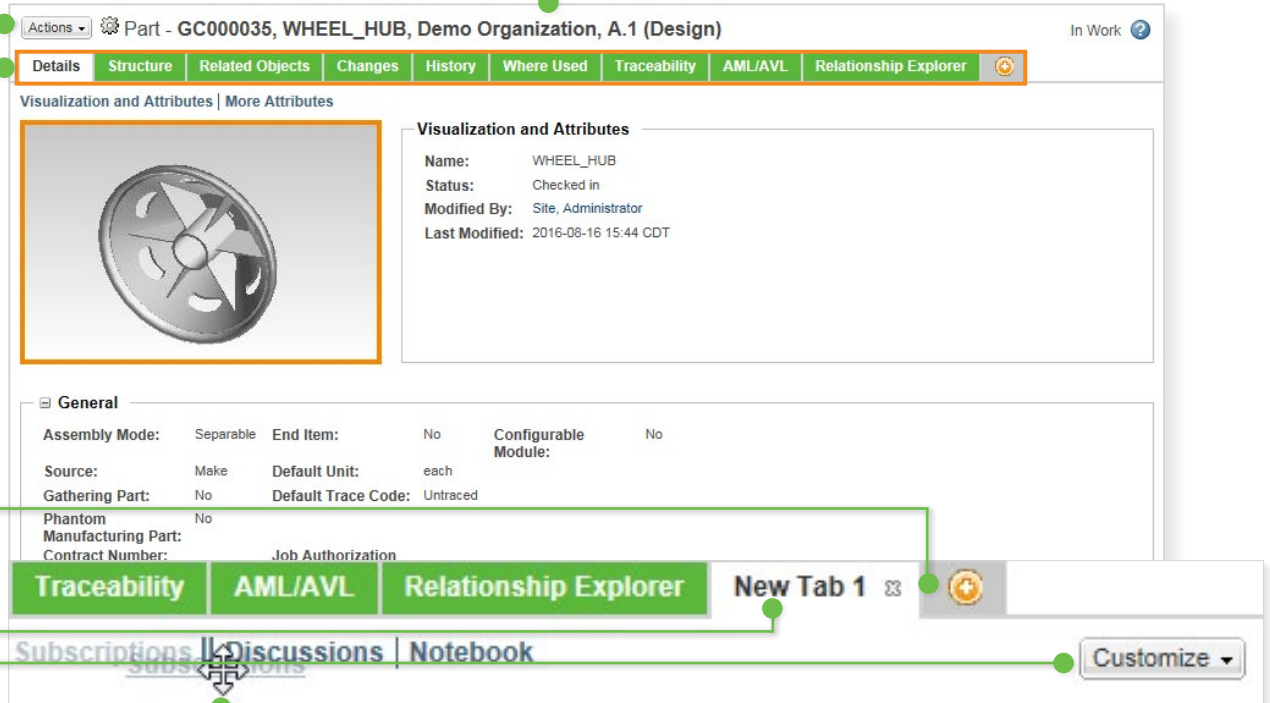
The part's identifying information such as its number, name, and version.

Create a new tab.


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

Add new information tables to your new tab.

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

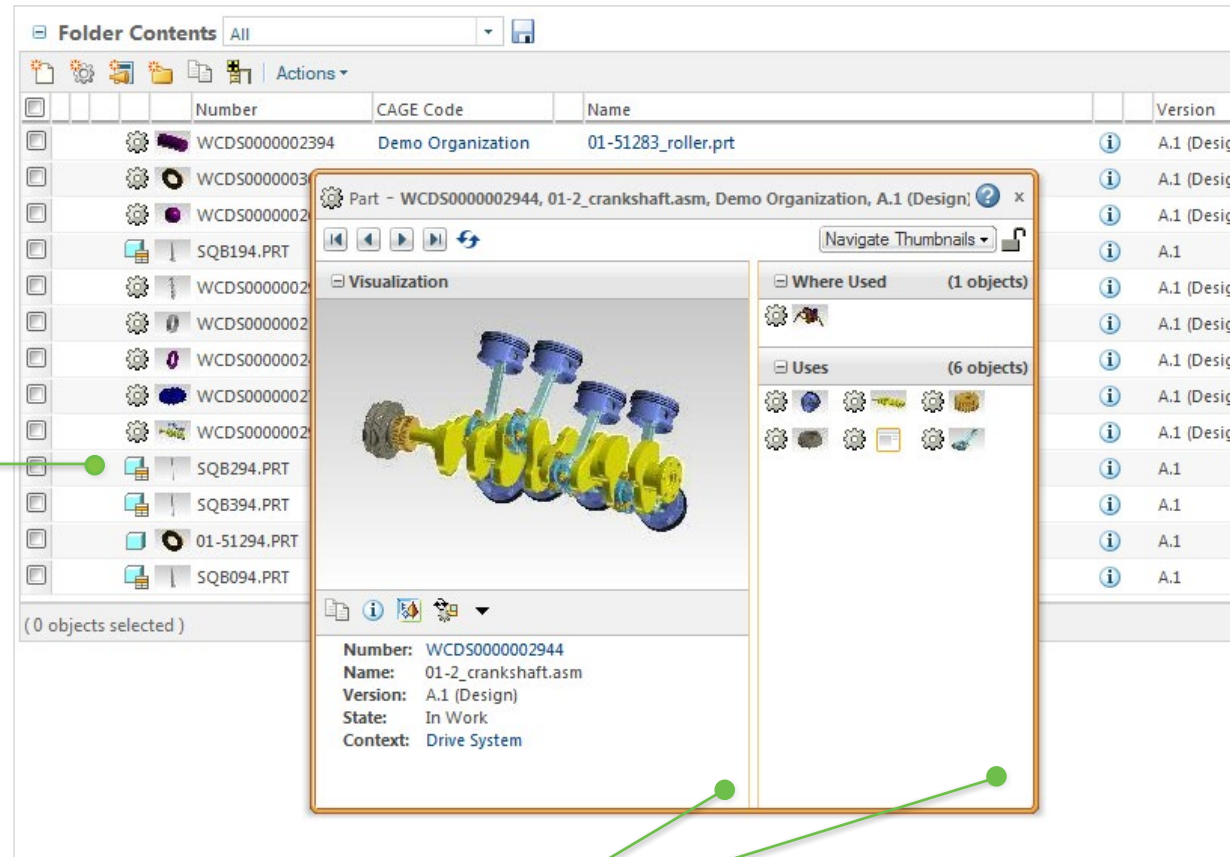


Did You Know?

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.

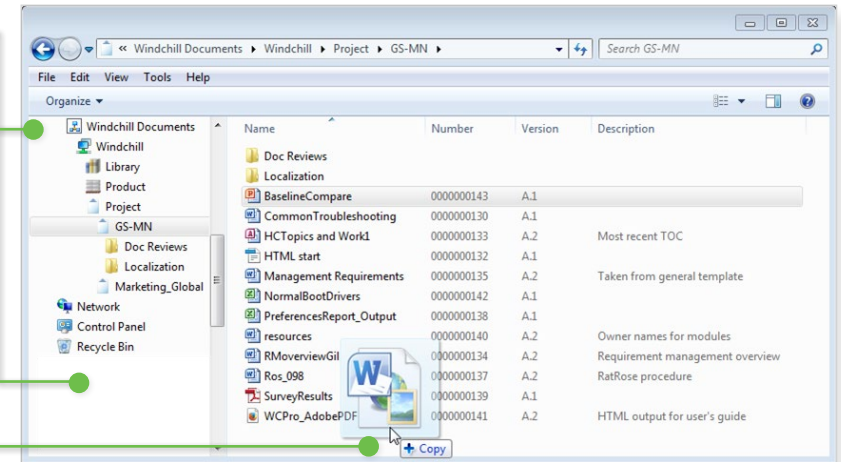


Resize either the window or the panes to see as much or as little as needed.

Desktop Integration for Documents

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.

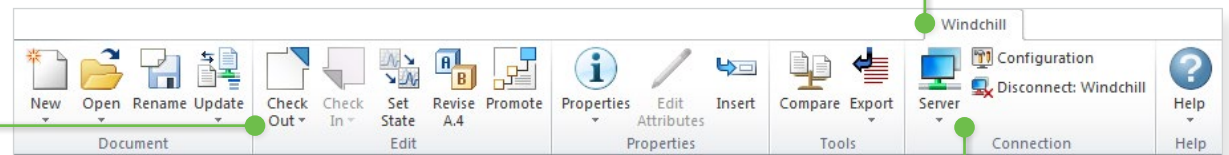
Drag-and-drop documents here to add them to Windchill.



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.



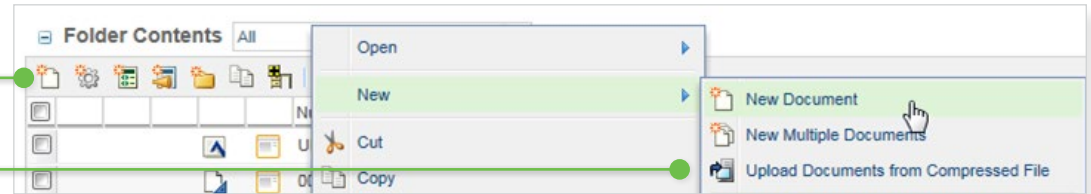
Did You Know?

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.

Document Management in Windchill

Create a new document by clicking the **New Document** icon or selecting **Actions>New>New Document**.

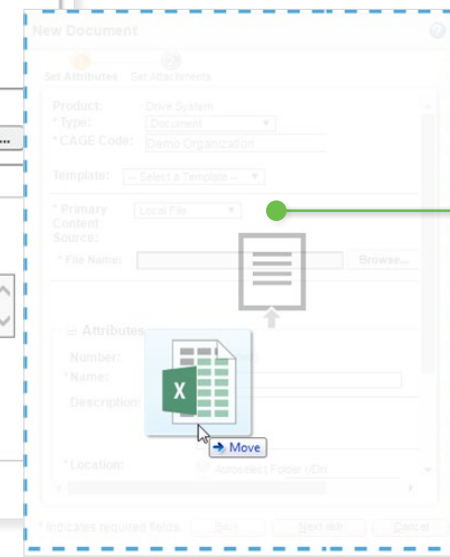
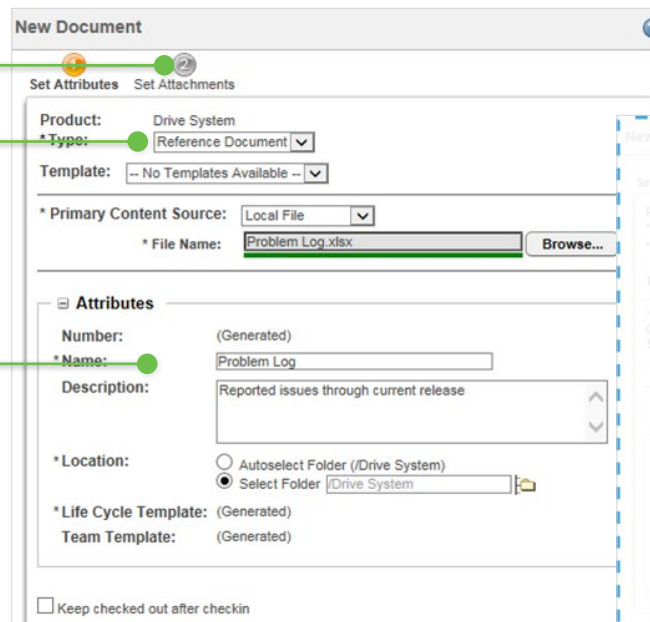
Select **New Multiple Documents** to create multiple documents at once. Select **Upload Documents from Compressed File** to upload documents in a ZIP file.



Optionally, upload attachments such as images or links.

Select the document type.

Identifying information, such as name and description. Your site can add custom attributes for different document types.



You can upload documents by dragging and dropping them over the **New Document** or **New Multiple Documents** windows.

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.

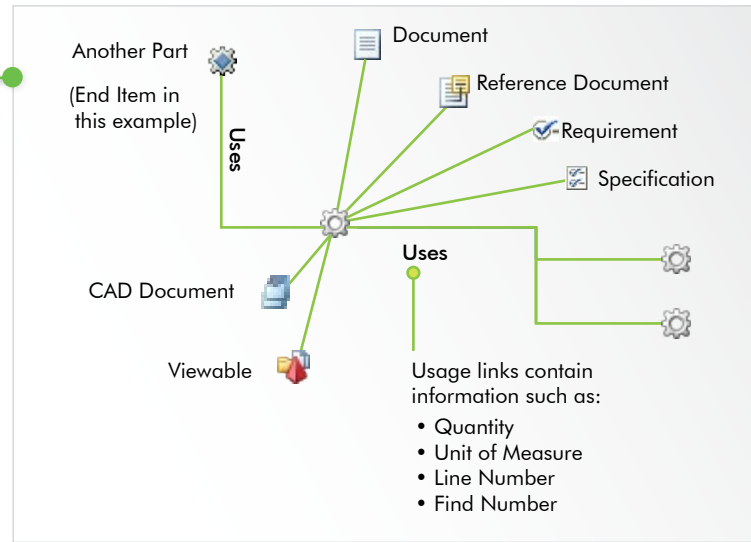
Did You Know?

If you are using Google Chrome or Mozilla Firefox, you can create documents by dragging and dropping the files directly over the Folder Contents table.

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



Part Relationship Diagram



▲ Example of information that can be related to a part.

Part's identification information

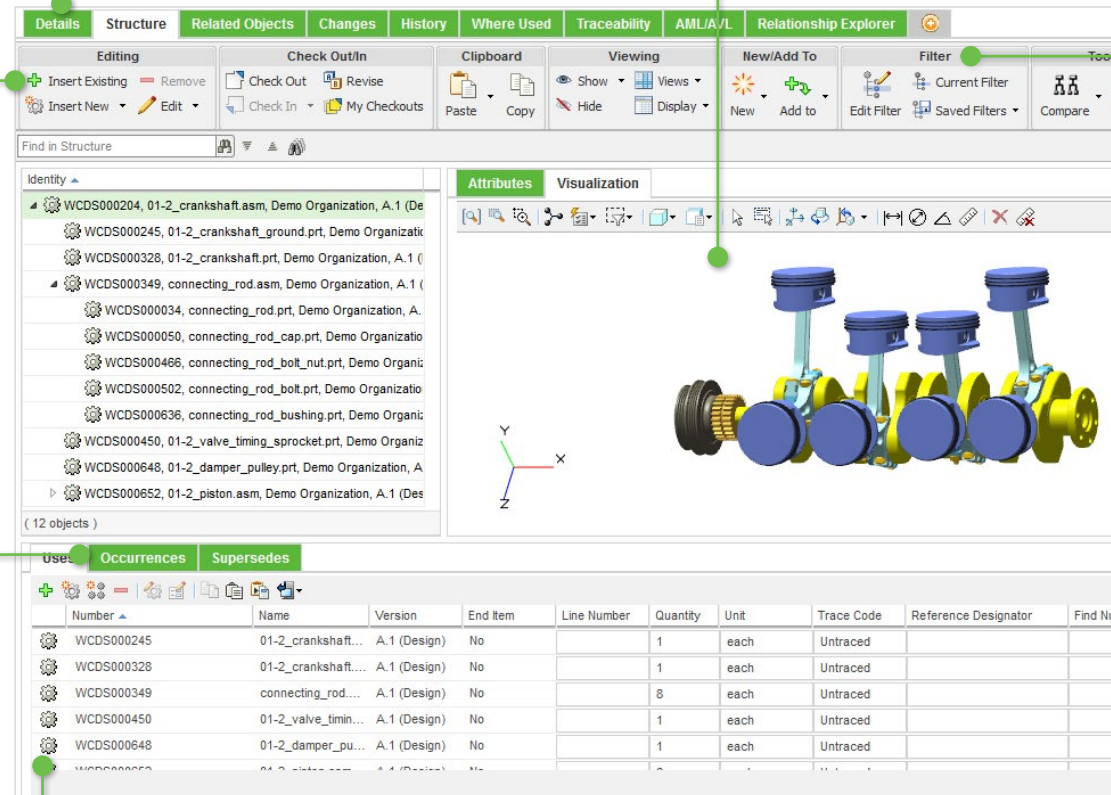
Visualization and Attributes	
Name:	WHEEL_HUB
Status:	Checked in
Modified By:	Site, Administrator
Last Modified:	2016-08-16 15:44 CDT

Visual representation of the part.
Click to launch Creo View.

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.

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



In the Occurrences tab, directly access, view, and edit information.

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

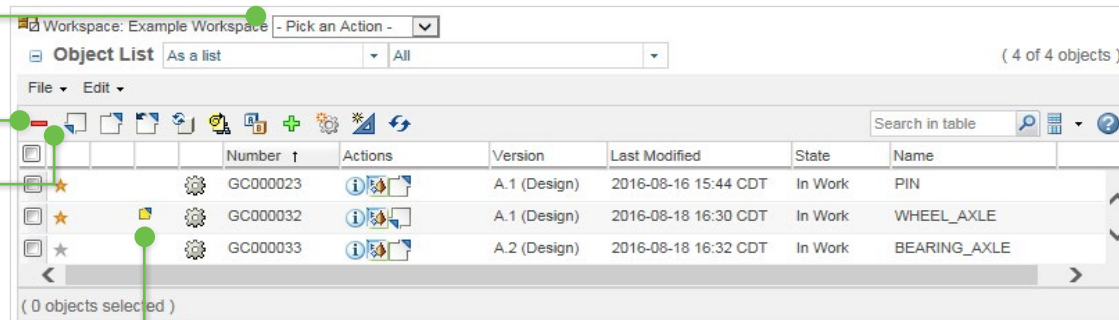
In the Uses tab, enter a partial part number or name and the system will auto-suggest matching parts that you can select to add.

Use configuration specifications, attributes, and spatial criteria to display the desired product structure configuration.

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

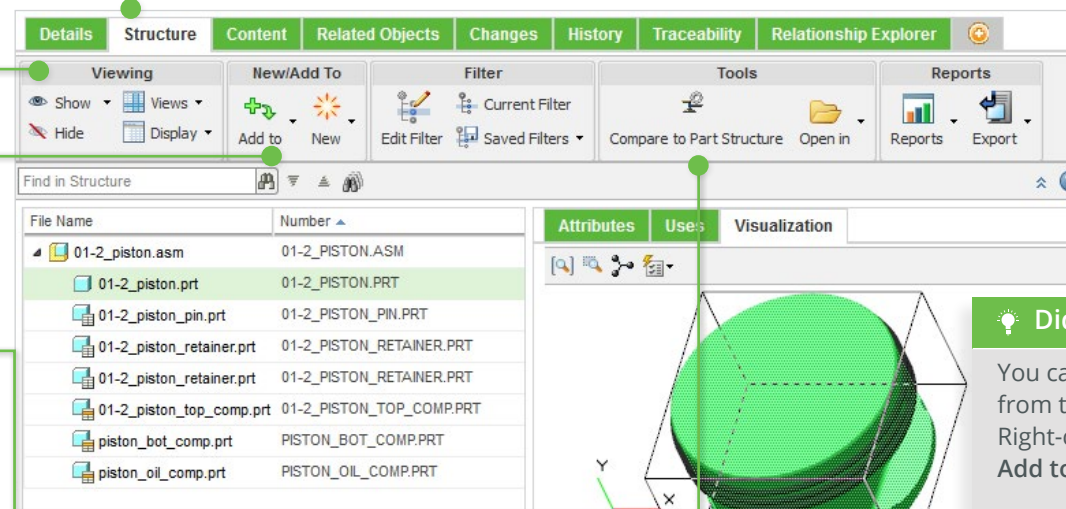
- Shared to a project
- Shared from PDM
- Checked out from PDM
- Locked
- Checked out by you
- Checked out by you in another workspace
- New
- Checked out by another user
- Checked out to a project
- Another iteration is checked out by you
- Another iteration is checked out by another user
- Modified 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 or 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 from the folder browser or search results. Right-click the object and select **Add to Workspace**

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.

View the specific differences between the two structures by clicking the arrows.

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

Differences between the two structures appear with a red font.

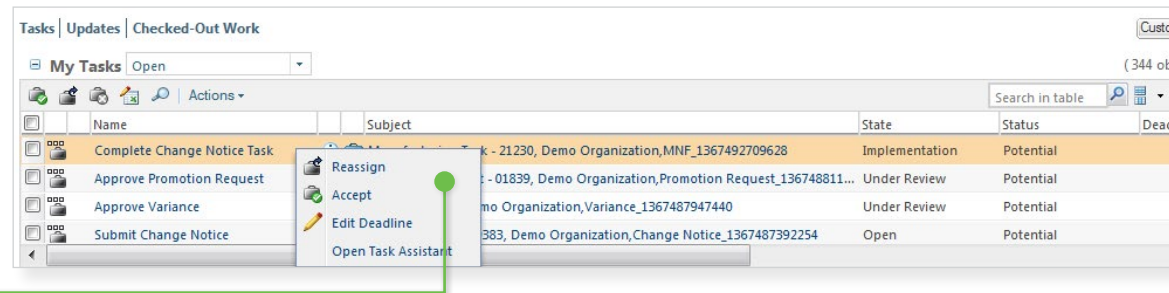
Lower-pane tabs provide additional attribute, usage and related-object information.

The screenshot displays the Windchill Structure Compare tool interface. The top navigation bar includes tabs for Details, Structure, Content, Related Objects, Changes, History, Traceability, and Relationship Explorer. Below this is a toolbar with sections for Viewing, New/Add To, Filter, Tools, and Reports. The main workspace is divided into two panes for side-by-side comparison. The left pane shows a table of file names and numbers, with a 'Build multi-level Part structure' icon highlighted. The right pane shows a 3D visualization of a part. The bottom pane displays detailed comparison data for two structures, with differences highlighted in red. Lower-pane tabs for 'Attributes', 'Uses', 'Related Parts', and 'Choices' are visible at the bottom.

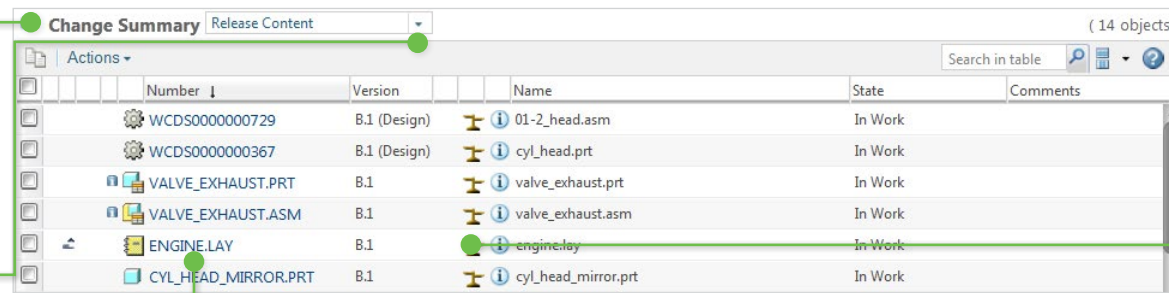
File Name	Number
01-2_piston.asm	01-2_PISTON.ASM
01-2_piston.prt	01-2_PISTON.PRT
01-2_piston_pin.prt	01-2_PISTON_PIN.PRT
01-2_piston_retainer.prt	01-2_PISTON_RETAINER.PRT
01-2_piston_retainer.prt	01-2_PISTON_RETAINER.PRT

Number	Name	Version	Identity	Qual...	Unit	Build Status
01-2_PISTON.ASM	01-2_piston.asm	A.1	WCD5000652, 01-2_piston.asm, Demo Organization, A.4 (Des			
01-2_PISTON.PRT	01-2_piston.prt	A.1	WCD5000397, 01-2_piston.prt, Demo Organization, A.1 (D	1	each	Completed
01-2_PISTON_PIN.PRT	01-2_piston_pin.prt	A.1	WCD5000045, 01-2_piston_pin.prt, Demo Organization, A.	1	each	Completed
01-2_PISTON_RETAINER.PRT	01-2_piston_retainer.prt	A.1	WCD5000486, 01-2_piston_retainer.prt, Demo Organizatio	1	each	Completed
01-2_PISTON_RETAINER.PRT	01-2_piston_retainer.prt	A.1	WCD5000486, 01-2_piston_retainer.prt, Demo Organizatio	1	each	Completed
01-2_PISTON_TOP_COMP.PRT	01-2_piston_top_comp.prt	A.1	WCD5000383, 01-2_piston_top_comp.prt, Demo Organiza	1	each	Completed

Assess your change tasks directly from the **My Tasks** 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.

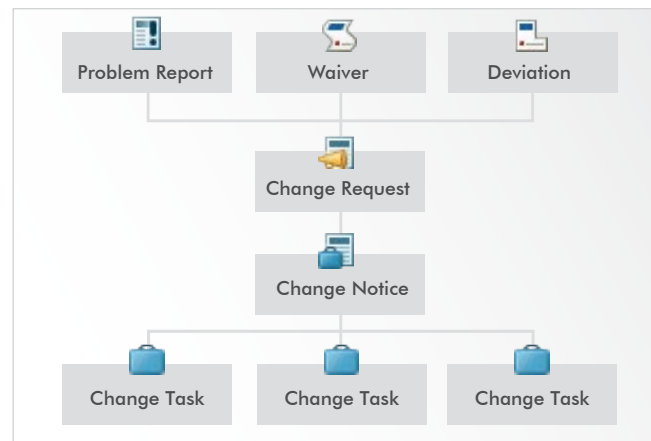


Additional default table views include views for **Affected Parts** and **Change Intent**. Additionally, you may customize your view to meet your organization's business needs.

Easily compare information.

Display parts, CAD documents, documents, and other items on the change.

Change workflow

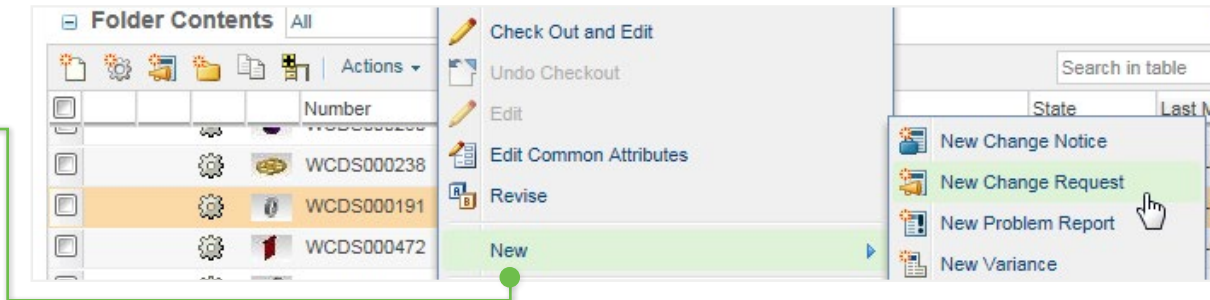


Change terminology in Windchill

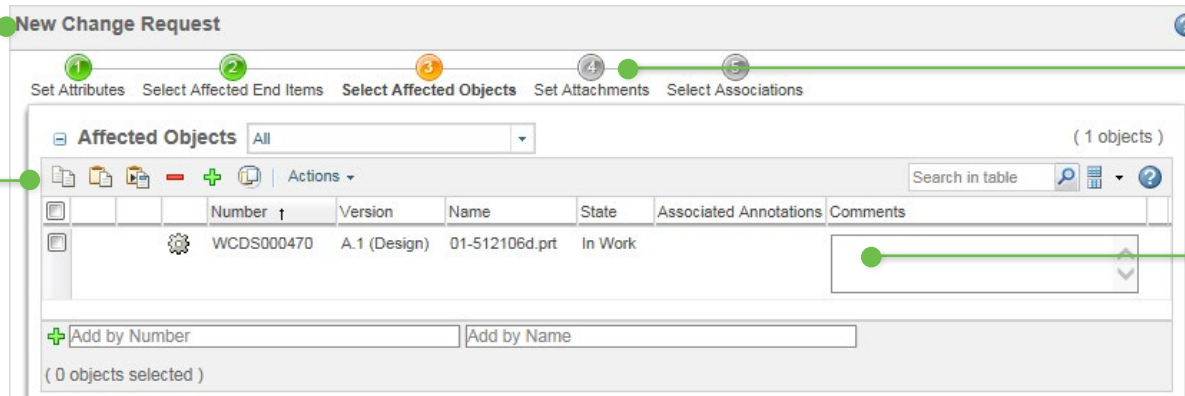
Item	Description	Required
Problem Report	Define an issue or opportunity	Optional
Deviation	Acceptance of planned departure from configuration before part is built	Optional
Waiver	Acceptance of non-conformance after part has been built	Optional
Change Request	Define business and technical justification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

Change Management: Create New Change Request

Start a new change request by right-clicking on the affected object and selecting **New>New Change Request**.



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

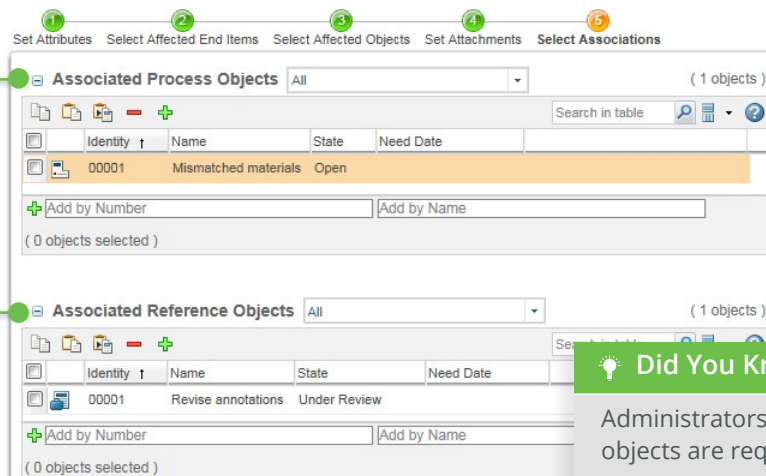


Objects that are impacted or referenced by the change. Add additional affected objects with the clipboard or **Add**, or use the collector to find related items.

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

Comments for affected objects, such as why this item was added.

Related change objects that are part of the same change process.



Change objects that are not part of the same process, but can be used as references.

Did You Know?

Administrators can create rules that determine what objects are required when associating other changes.

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. Top-down design (TDD) allows 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.

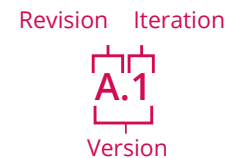
Roles: A role determines the access privileges that users have and what they are allowed to do within contexts. Manager, reviewer, observer, or approver are all examples of roles.

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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