



Windchill® User Guide for SMEs

Computer Programs and Documentation

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UL File#	Products listed with UL
MH1941	All Gilbarco pumps and dispensers that bear the UL listing mark.
MH8467	Transac System 1000 and PAM 1000
E105106	Dell DHM Minitower
E165027	G-SITE and Passport Systems

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Executive Order #	Product
G-70-52-AM	Balance Vapor Recovery
G-70-150-AE	VaporVac

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Gilbarco pumps and dispensers are evaluated by NCWM under the National Type Evaluation Program (NTEP). NCWM has issued the following CoC:

CoC#	Product	Model #	CoC#	Product	Model #
02-019	Encore	Nxx	02-036	Legacy	Jxxx
02-020	Eclipse	Exx	02-037	G-SITE Printer (Epson)	PA0307
02-025	Meter - C Series	PA024NC10		G-SITE Distribution Box	PA0306
	Meter - C Series	PA024TC10		G-SITE Keyboard	PA0304
02-029	CRIND	—		G-SITE Mini Tower	PA0301
	TS-1000 Console	—		G-SITE Monitor	PA0303
	TS-1000 Controller	PA0241		G-SITE Printer (Citizen)	PA0308
02-030	Distribution Box	PA0242	02-038	C+ Meter	T19976
	Meter - EC Series	PA024EC10	02-039	Passport	PA0324
	VaporVac Kits	CV	02-040	Ecometer	T20453
			05-001	Titan	KXXY Series

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Ecometer™	Horizon™	SmartCRIND™	ValueLine™
ECR™	Insite360™	SMART Meter™	
EMC™	MultiLine™	SmartPad™	
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1 – Introduction

Purpose

This manual provides step-by-step instructions of the tasks that the Subject Matter Expert (SME) needs to complete in Windchill® before a document is released on GOLDSM.

Intended Audience

This document is meant for internal use by Gilbarco® associates.

Pre-Requisite

The SME needs to get a Windchill account set up before raising a TechComm Change Request (TCR).

Note: To set up a Windchill account, contact the Gilbarco Windchill Team at windchill@gilbarco.com.

Abbreviations and Acronyms

Term	Description
SME	Subject Matter Expert
TCN	TechComm Change Notice
TCR	TechComm Change Request

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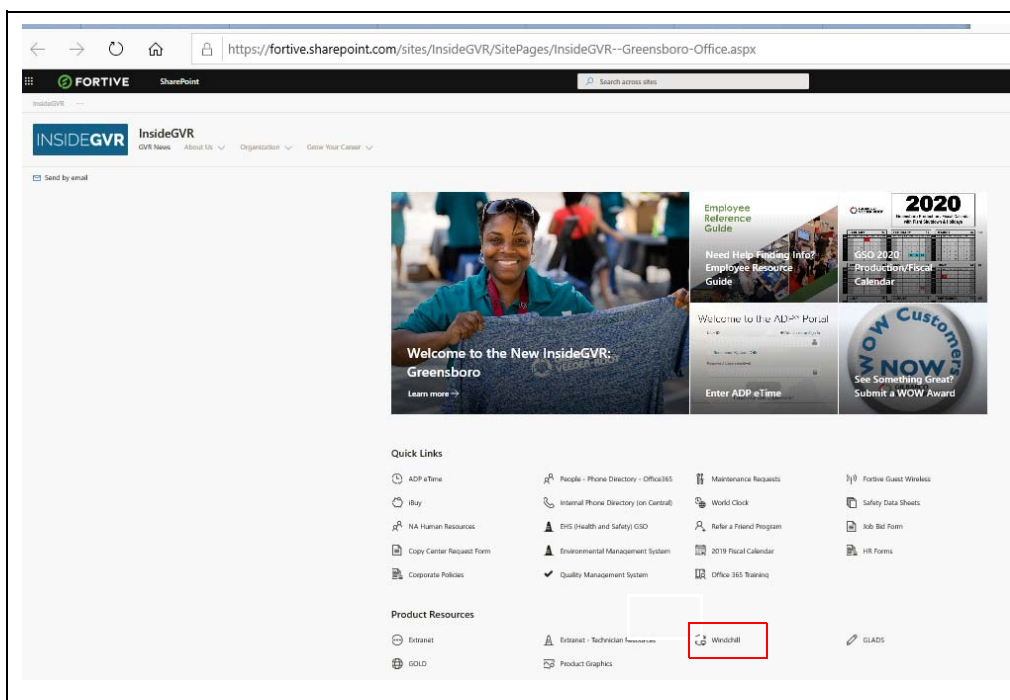
2 – Creating a TCR

Note: A TCR is a Change Request that the Requestor needs to raise on Windchill for creating a new document or modifying an existing document.

To create a new TCR, proceed as follows

- 1 Open the Gilbarco Intranet (<http://central.gilbarco.com/>) and select **Windchill** from the Product Resources section.

Figure 2-1: Gilbarco Intranet




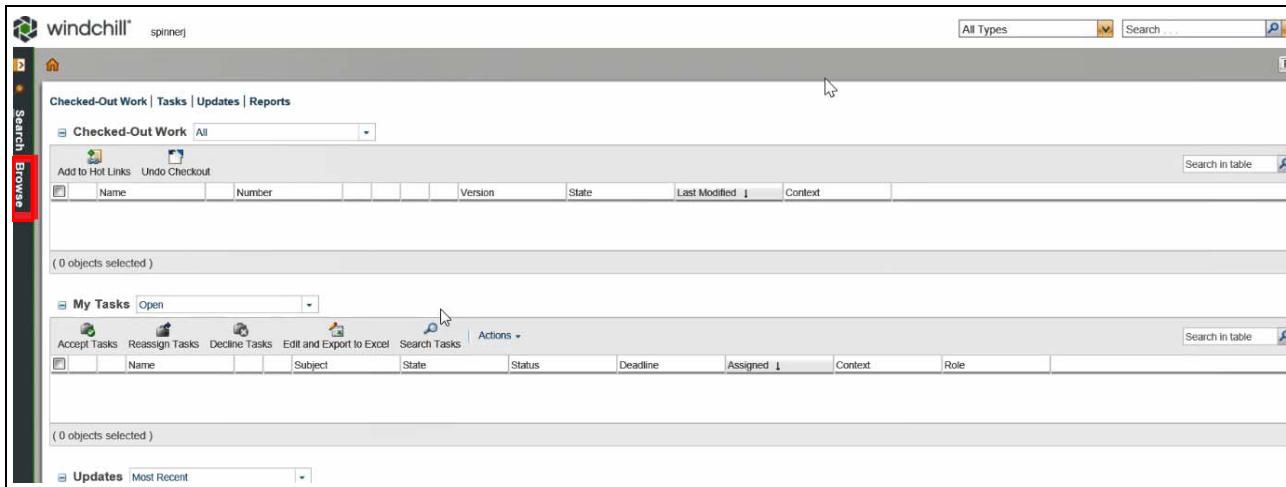
- 2 Log into your Windchill account using your User name and Password and click the Home  icon to view the Windchill homepage.

Figure 2-2: User Name and Password Screen

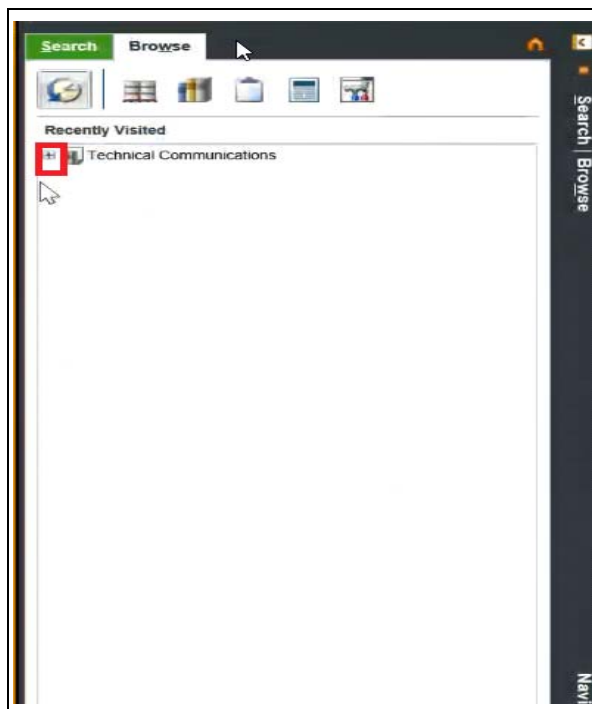
- 3 Select **Browse** from the homepage.

Figure 2-3: Selecting Browse



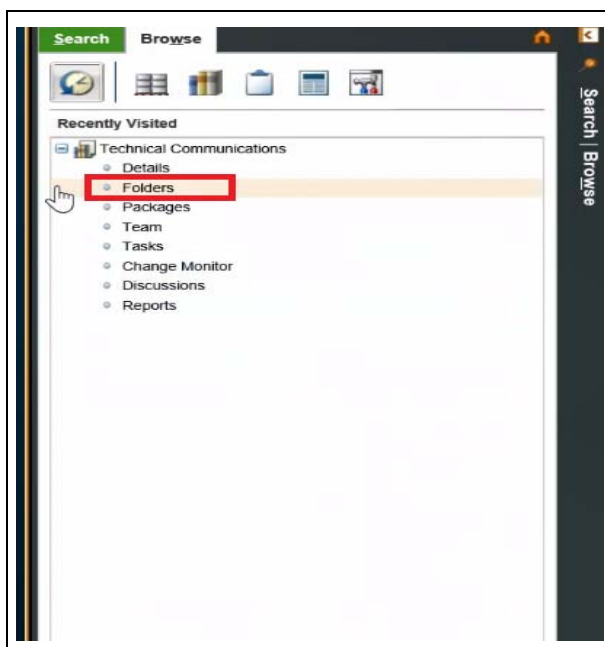
- 4 From the Browse folder, select the (+) sign to expand the Technical Communications category.

Figure 2-4: Expanding Technical Communication Category



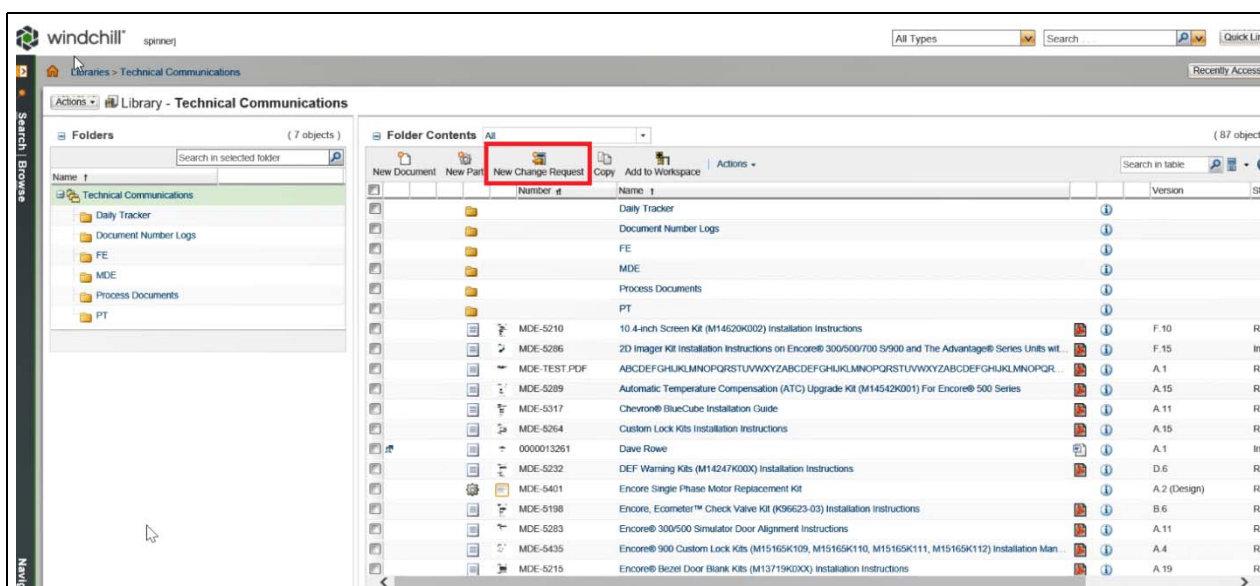
- From the expanded Technical Communications category, select **Folders**.

Figure 2-5: Selecting the Folders Category



- The Technical Communications folders open. Click **New Change Request**.

Figure 2-6: Selecting New Change Request



- 7 The New Change Request page opens. Select **TechComm Change Request** from the **Type** drop down and fill out the Attributes.

Figure 2-7: Selecting TechComm Category

The screenshot shows the 'New Change Request' form. At the top, there's a progress bar with steps: Set Attributes, Select Affected End Items, Select Affected Objects, Set Attachments, and Select Associations. The 'Library' is set to 'Technical Communications' and the '* Type' is 'TechComm Change Request'. The 'Attributes' section contains several fields: 'Number' (Generated), '* Name' (text input), '* TechComm Category' (dropdown menu, highlighted with a red box), '* First Draft Date' (calendar icon and 'yyyy-mm-dd' format), '* GOLD Release Date' (calendar icon and 'yyyy-mm-dd' format), '* Description' (text area), 'Location' (Generated), '* Engineering Project' (dropdown), '* Engineering Department' (dropdown), '* Product Line' (dropdown), '* Project Manager' (text input), and '* PDWare Project' (text input). To the right of these dropdowns are three 'If Other, please specify:' text input fields. A note at the bottom left states '* Indicates required fields.'

- **Name:** Official name of the document and MDE/PT/FE number if it is an existing document.
 - **TechComm Category:** Category for the change request.
 - **First Draft Date:** Date when a draft is needed in preparation for field trials or QA.
 - **GOLD Release Date:** Date when document is needed for product release.
 - **Description:** Description of change/needs for the request.
 - **Engineering Project:** Select the Project name from the drop-down list.
 - **Engineering Department:** Select the Engineering department from the drop-down list.
 - **Product Line:** Select the Product from the drop-down list.
 - **Project Manager:** Project manager
 - **PDWare Project:** Identify the project/module to which the time should be applied.
- Note: Failure to provide a response for every field may result in your request being returned to you for completion.*

- 8 After filling out the “Set Attributes” section, click **Next**.

- 9 The “Select Affected End Items” screen opens. If applicable, add Affected End Items by typing the document number of the item in the “Add by Number” box and then select **Next**.

Figure 2-8: Select Affected End Items

New Change Request

1 Set Attributes 2 **Select Affected End Items** 3 Select Affected Objects 4 Set Attachments 5 Select Associations

Affected End Items (0 objects)

Copy Paste Paste Selection Remove Add Affected End Items Search in table

Number	Name	Context	Comments
<div> <div>+</div> <div>Add by Number</div> </div> <div> <div>+</div> <div>Add by Name</div> </div>			

(0 objects selected)

Back **Next** Finish Cancel

- 10 The “Select Affected Objects” screen opens. An *Affected Object* refers to an existing MDE or “object” for which you are requesting a change. If applicable, add Affected Objects by typing the document number of the item in the “Add by Number” box, press Enter and select the object to add it to the TCR. Click **Next**.

Figure 2-9: Select Affected Objects

New Change Request

1 Set Attributes 2 Select Affected End Items 3 **Select Affected Objects** 4 Set Attachments 5 Select Associations

Affected Objects All (0 objects)

Copy Paste Paste Selection Remove Add Affected Objects Collect Objects Actions Search in table

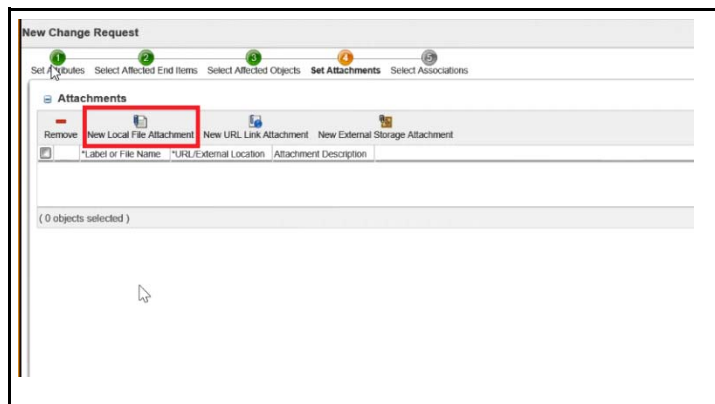
Number	Version	Name	State	Associated Annotations	Comments
<div> <div>+</div> <div>Add by Number</div> </div> <div> <div>+</div> <div>Add by Name</div> </div>					

(0 objects selected)

Back **Next** Finish Cancel

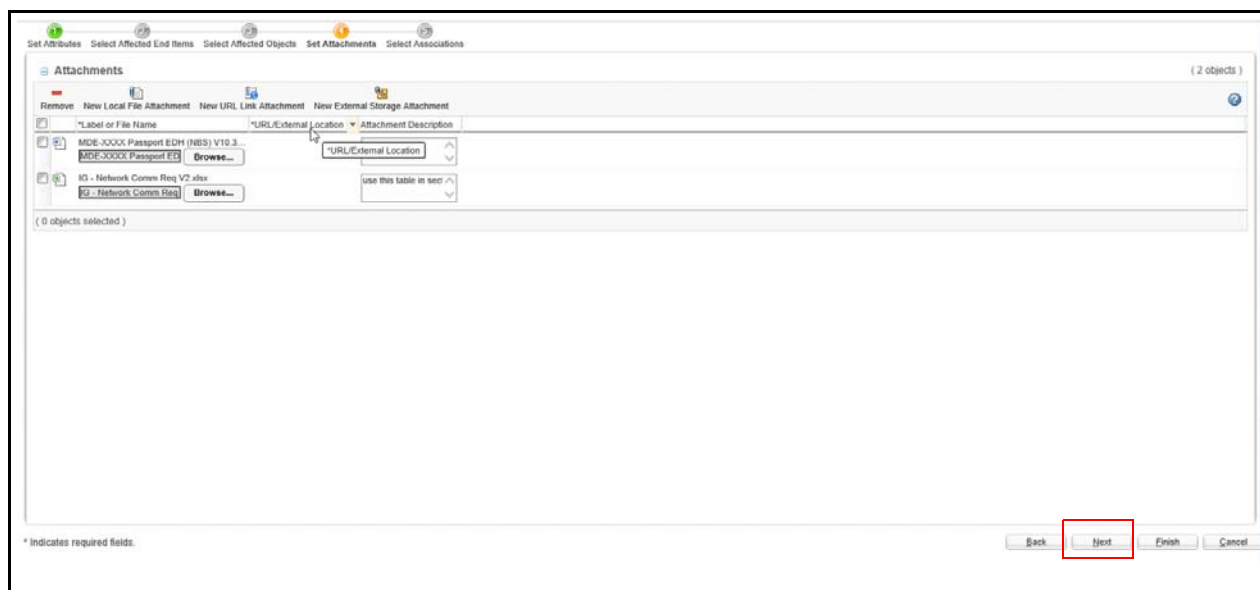
- 11 The “Attachments” screen opens. Select **New Local File Attachment**. Select the source material that shows the content of the changes from your personal computer to be added to the request.

Figure 2-10: Selecting Local File Attachment



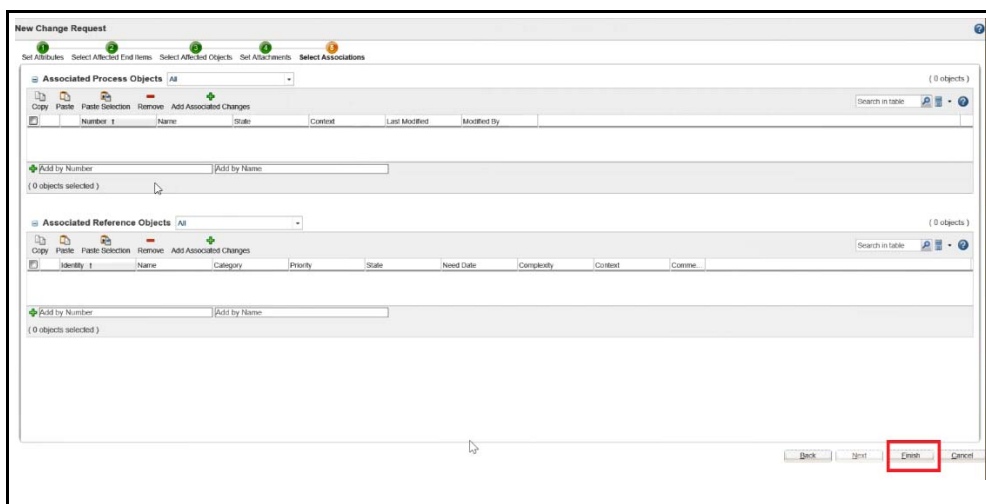
- 12 Once the source material has been added, the attachments will display in the attachments field. Click **Next** to proceed.

Figure 2-11: Adding Attachments



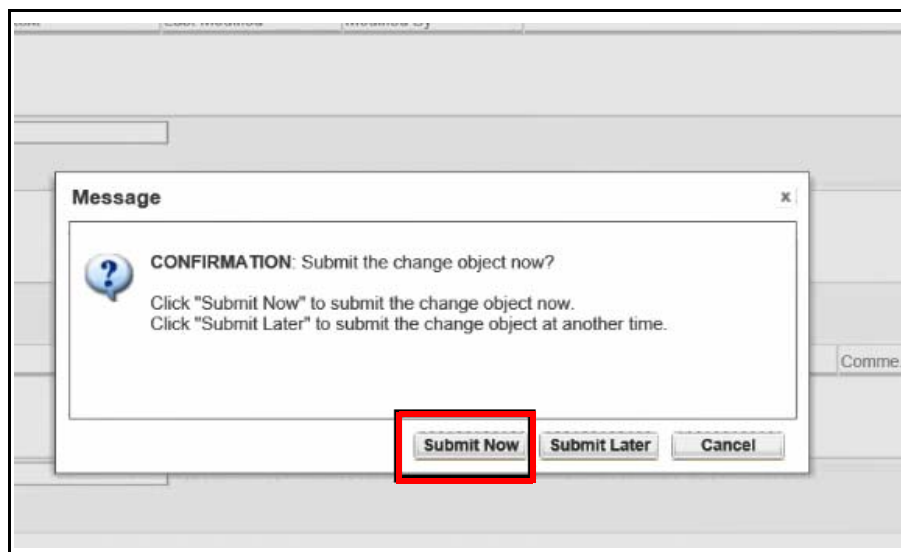
- 13 The “Select Associations” tab opens. Associated Process Objects could include another document or Change Notice that is connected to the request, for example, to be released in coordination of the same product and release schedule. Add the Associated Process Objects, if applicable, and then click **Finish**.

Figure 2-12: Adding Associated Process Objects



- 14 A confirmation message opens. Click **Submit Now**.

Figure 2-13: Submitting TCR



A confirmation message is displayed on the top banner showing the successfully created Change Request - TCRXXXXX.

- 15 Immediately after the request is submitted, the “Set SME Reviewers” task follows. In this step, identify the people who will review and approve the changes to the document in Windchill. Navigate back to the homepage, and select **Set SME Reviewers > Set Up Participants > Add Participants**.

Figure 2-14: Setting Up SMEs - 1

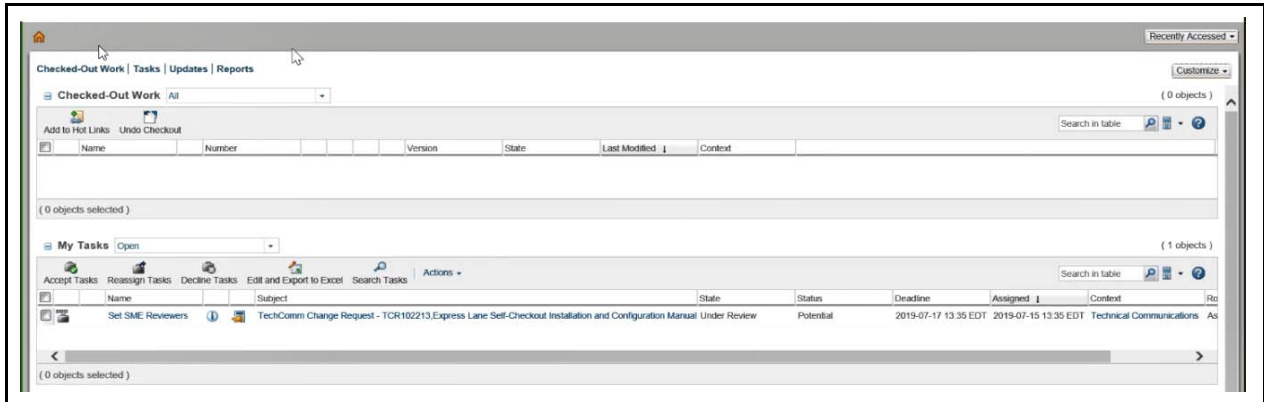


Figure 2-15: Setting Up SME - 2

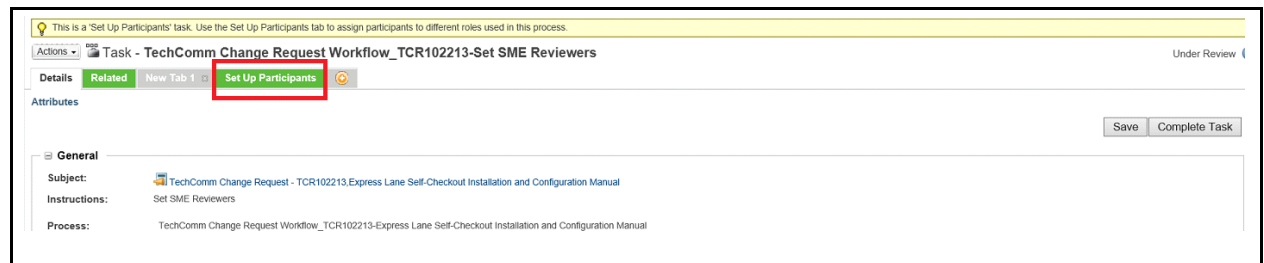
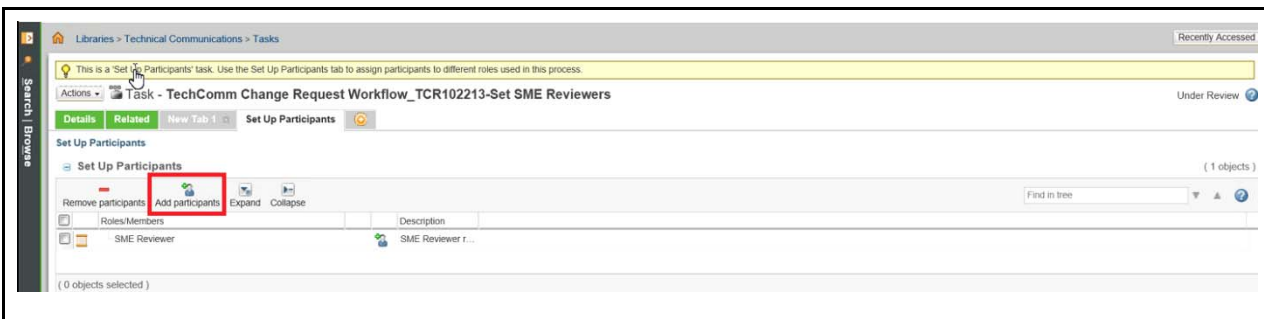


Figure 2-16: Setting Up SME - 3



- 16 The “Find Participant” screen opens. Enter the reviewer’s email address into the Email field, and then select **Search**.

Figure 2-17: Finding Participants

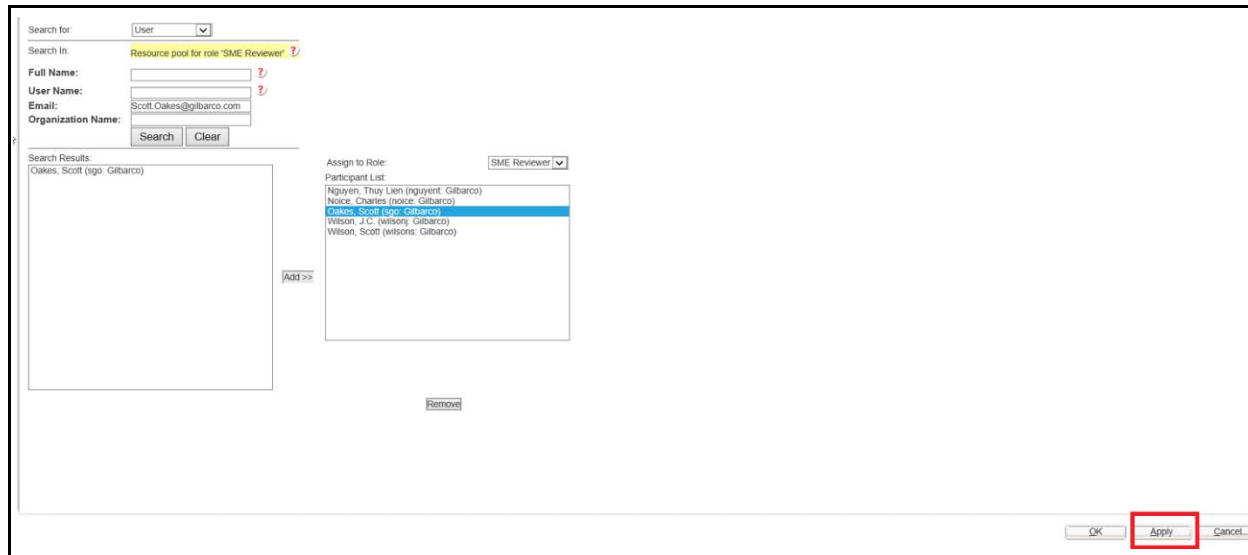
- 17 The selected reviewer’s name will display in the search results. Select **Add**, and repeat steps 14 on page 2-7 to 15 on page 2-8 until all the desired reviewers have been added.

Figure 2-18: Adding Reviewer Name

Note: If a reviewer’s email address is not found in the search, contact TechComm to get a Windchill account made for the reviewer. Windchill does not automatically add Requestors as reviewers. During this step, add yourself as a reviewer if you need to review the document as well.

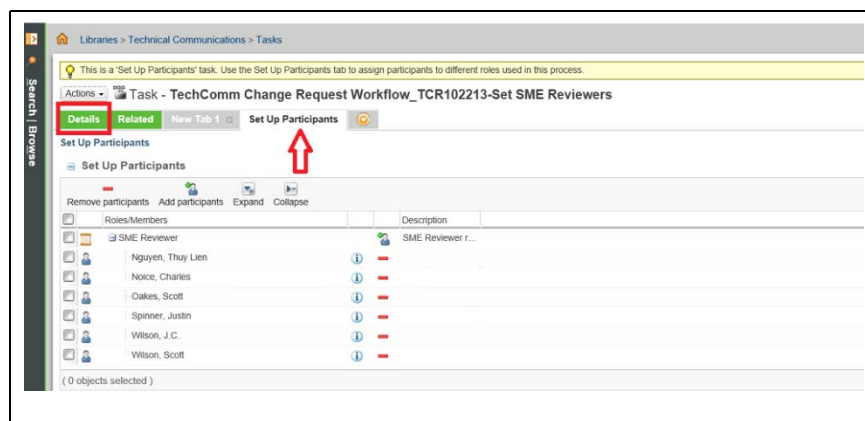
18 After all the desired reviewers have been added, click **Apply**.

Figure 2-19: Applying Settings



19 The task screen opens. Select **Details**.

Figure 2-20: Details Tab



- 20** Fill out the **Task Comments** and **Password** sections, and then select **Complete Task**. The TCR is directed to the Tech Comm team to review and implement.
Note: The Task Comments field is mandatory.

Figure 2-21: Completing Task

The screenshot displays the 'Set Up Participants' task completion interface. The breadcrumb trail at the top reads 'Libraries > Technical Communications > Tasks'. A yellow banner at the top states: 'This is a "Set Up Participants" task. Use the Set Up Participants tab to assign participants to different roles used in this process.' Below this, the task title is 'Task - TechComm Change Request Workflow_TCR102213-Set SME Reviewers' with a status of 'Under Review'. The 'Attributes' section includes a 'General' tab with the following details: Subject: TechComm Change Request - TCR102213, Express Lane Self-Checkout Installation and Configuration Manual; Instructions: Set SME Reviewers; Process: TechComm Change Request Workflow_TCR102213-Express Lane Self-Checkout Installation and Configuration Manual; Process Initiator: Spinner, Justin; Process Initiated On: 2019-07-15 13:35 EDT; Assignee: Spinner, Justin; Role: Assignee; Priority: Highest; Deadline: 2019-07-17 13:35 EDT; Status: Potential. The 'Inputs' section contains a 'Task Comments' text area with the value 'SME Reviewer set' and an 'Effectivity Date' of '2019-08-30 00:00 EDT'. Below these is a 'Password' field with a red arrow pointing to it and a note: 'Additional verification is required to complete this task.' At the bottom right, there are 'Save' and 'Complete Task' buttons, with the 'Complete Task' button highlighted by a red box.

Raising a TCR is now complete.

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3 – Windchill Tasks

SME Review Task

After the document is approved by the CA2, the task is forwarded to the SME for review. The SME will receive an e-mail notification for the same.

The SME can log into their Windchill account and will find a new task, “SME Review Task”, that needs to be completed.

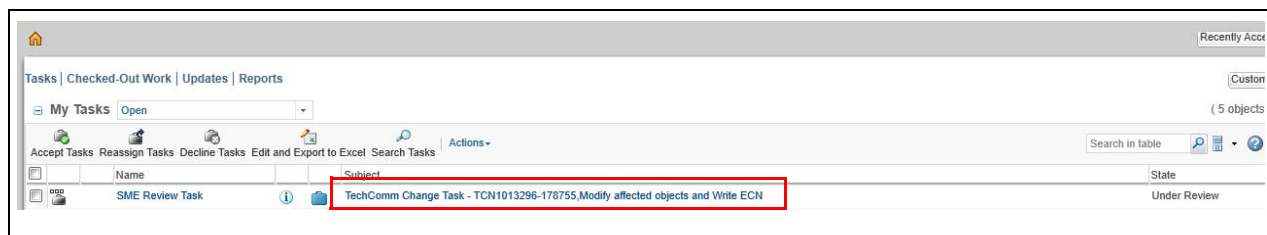
Figure 3-1: Viewing My Tasks



To complete the SME Review Task, proceed as follows:

- 1 Click the Subject link of the SME Review Task.

Figure 3-2: Clicking the Subject Link



The TechComm Change Task page opens.

Figure 3-3: TechComm Change Task Page

The screenshot shows the 'TechComm Change Task - TCN1016657-216137' page. The left sidebar has a 'Search | Browse' button. The main content area has tabs for 'Details', 'Process', and 'Implementation'. Below these are sections for 'Attributes', 'Process', 'System', and 'Attachments'. The 'Attributes' section shows: Name: MDE-5376F SmartCRIND™ Troubleshooting Guide, Change Notice: TechComm Change Notice - TCN1016657, Description: Costco has requested a change to the MDE. The 'Process' section shows: Assignee: Bennett, Britni, Need Date: 2020-10-09, Reviewer: Creech, Paula. The 'System' section shows: Team: TechComm Change Activity Team, Name: , Created By: Bennett, Britni, Modified By: Singh, Sukriti, Created On: 2020-09-10 13:18 EDT, Last Modified: 2020-09-14 00:53 EDT. The 'Attachments' section shows '(2 objects)'.

- 2 Scroll down to the bottom of the page and click the **Document Number** in the Resulting Objects section.

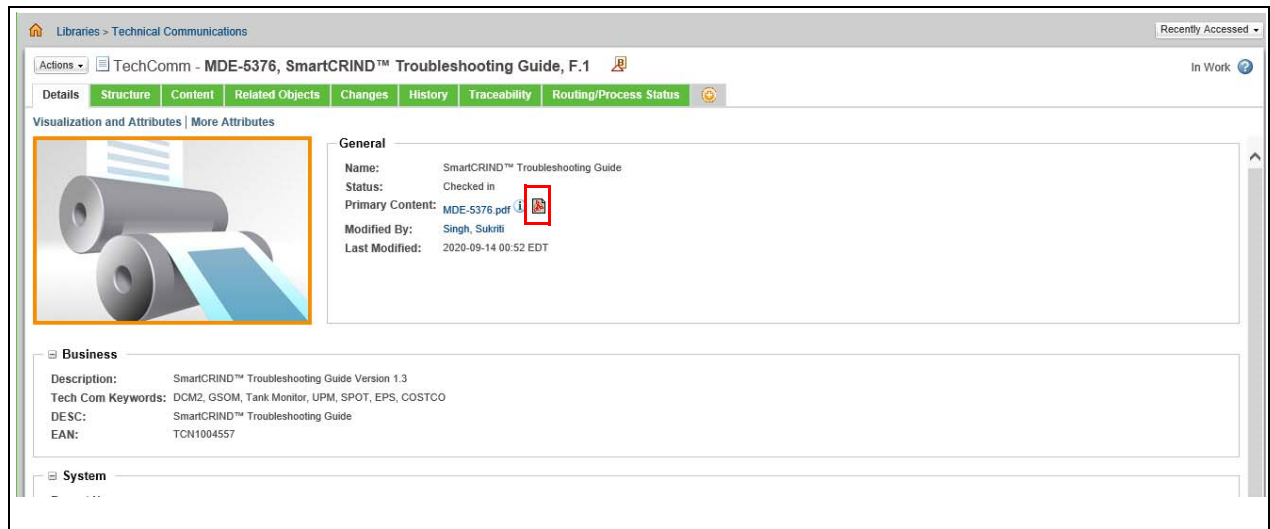
Figure 3-4: Selecting Document Number

The screenshot shows the 'Affected Objects' and 'Resulting Objects' sections. The 'Affected Objects' section has a table with 1 object: MDE-5376, E.7, SmartCRIND™ Troubleshooting Guide. The 'Resulting Objects' section has a table with 1 object: MDE-5376, F.1, TCN1004557, SmartCRIND™ Trou... SmartCRIND™ Trou... In Work. The 'MDE-5376' document number in the 'Resulting Objects' table is highlighted with a red box.

Copy	Mass Change	Set Effectivity	View Effectivity	Edit	Actions	Number	Version	EAN	DESC	Name	State	Comments
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MDE-5376	F.1	TCN1004557	SmartCRIND™ Trou...	SmartCRIND™ Trou...	In Work	

- 3 The following page is displayed. Click the PDF icon to download the file.

Figure 3-5: Downloading PDF



- 4 After downloading the PDF, review the document against the input provided.
- 5 After reviewing the document, the SME has two options:
- Approve – The document does not need any change and can be released (see [“Approving the Document”](#) on [page 3-5](#)).
 - Rework – The SME has some feedback and the document needs rework ([“Sending Task for Rework”](#) [page 3-6](#)).

Reassigning a Task to Another Person

To reassign a task to another person, proceed as follows:

- 1 Select the task and click **Reassign Tasks**.

Figure 3-6: Reassigning Tasks



- 2 Select the name from the **Reassign To** drop-down list and click **OK**.

Figure 3-7: Reassigning the Task

Reassign Tasks - Internet Explorer

Reassign Tasks

*Reassign to: Singh, Sukriti (sukriti.singh.Gilbarco)

Reason for reassignment:

* Indicates required fields.

OK Cancel

The task will be successfully reassigned.

Approving the Document

To approve the document, proceed as follows:

- 1 Navigate to the Windchill Homepage by clicking the Home icon.
- 2 From the Windchill Home page, click the information button.

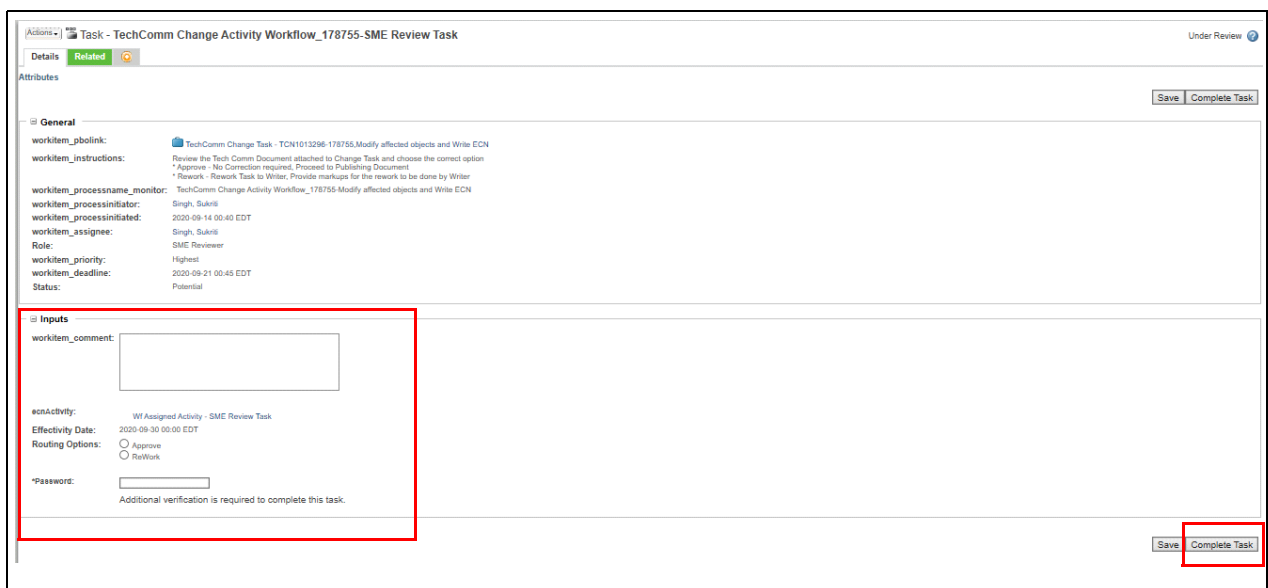
Figure 3-8: Clicking Information Button



The TechComm Change Activity Workflow page opens.

- 3 In the workitem_comment text box, enter your comment, then click the **Approve** radio button. Enter your Windchill password, and then click **Complete Task**.

Figure 3-9: Approving a Task



The document is approved from the SME.

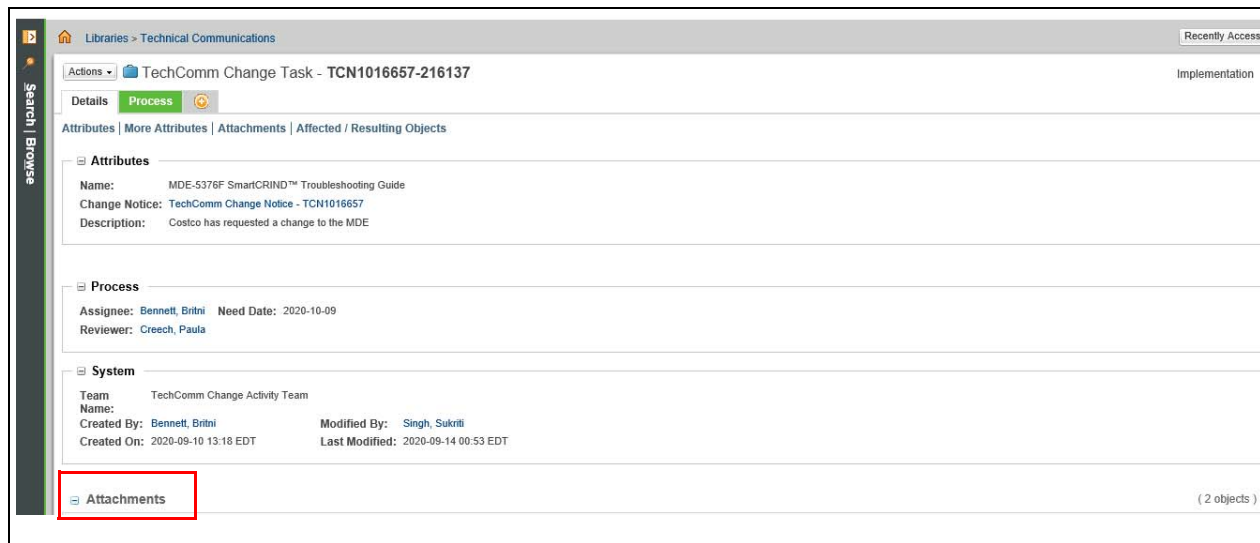
Sending Task for Rework

If the document needs further modifications, send the task back as rework.

To send the task back for rework, proceed as follows:

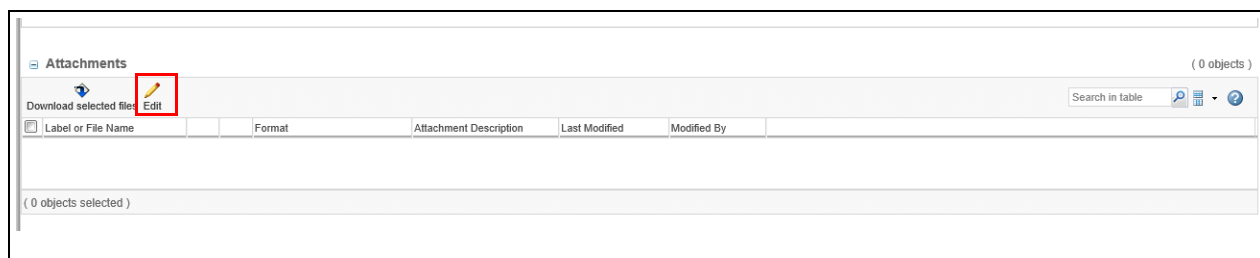
- 1 Navigate to the TechComm Change Task page and go the “Attachments” section.

Figure 3-10: Attachments Section



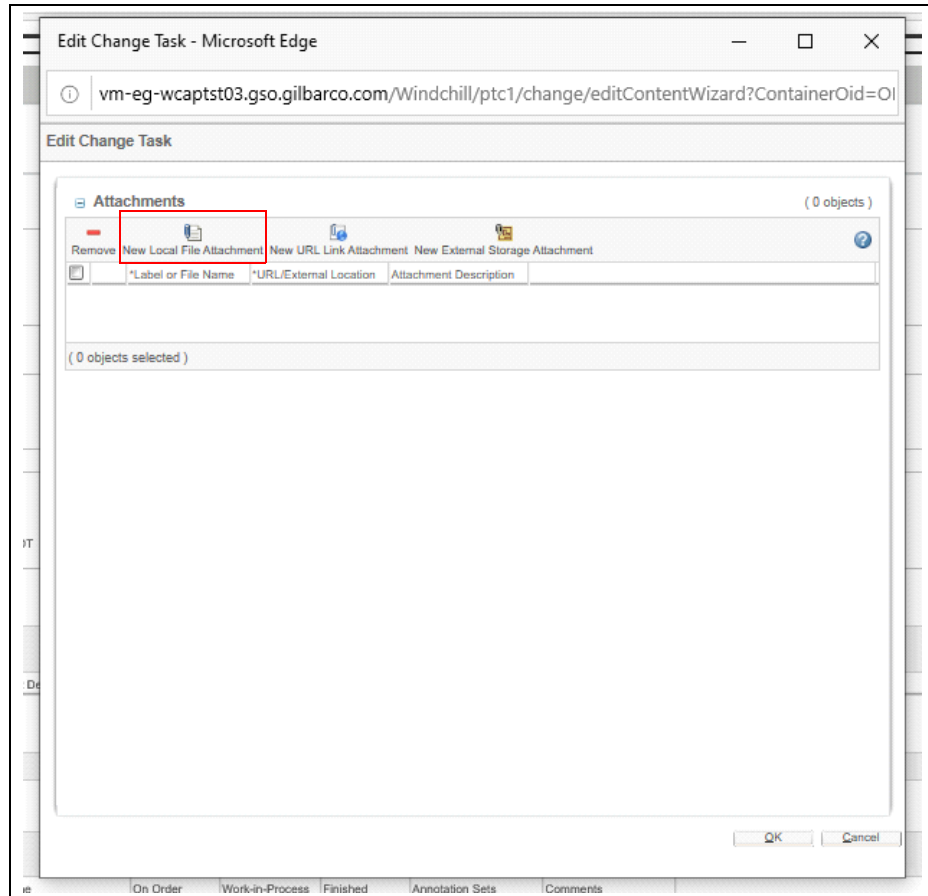
- 2 Click the **Edit** button.

Figure 3-11: Clicking Edit



- 3 A dialog box to your feedback opens. Click the **New Local File Attachment** button and browse to the location on your local machine and add the attachment/attachments (PDF, Word, JPEG, PNG, and Excel).

Figure 3-12: Uploading Attachment



- 4 After the attachment is uploaded, click **OK**.
- 5 Navigate to the Windchill Homepage by clicking the Home icon.
- 6 From the Windchill Home page, click the information button.

Figure 3-13: Clicking Information Button



The TechComm Change Activity Workflow page opens.

- 7 In the workitem_comment text box, enter your comment, then click the **ReWork** radio button. Enter your Windchill password, and then click **Complete Task**.

Figure 3-14: Sending Rework Task

The screenshot shows the Windchill interface for a task titled "TechComm Change Activity Workflow_178755-SME Review Task". The task is currently "Under Review". The "Inputs" section is highlighted with a red box and contains the following fields:

- workitem_comment:** A text area for entering a comment.
- ecActivity:** A dropdown menu showing "WT Assigned Activity - SME Review Task".
- Effectivity Date:** A date field showing "2020-09-30 00:00 EDT".
- Routing Options:** Radio buttons for "Approve" and "ReWork", with "ReWork" selected.
- Password:** A text field for entering a password, with a note: "Additional verification is required to complete this task."

At the bottom right of the form, the "Complete Task" button is highlighted with a red box.

The document is sent back for rework from the SME.

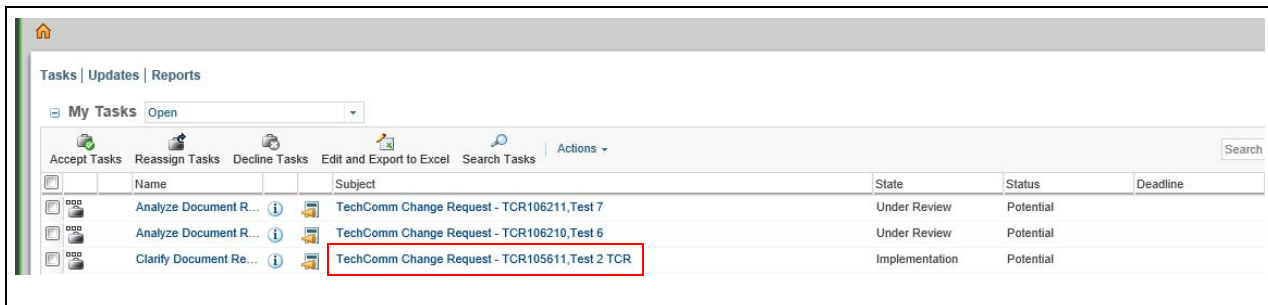
Clarify Document Request

After a TCR is raised by the SME, the CA1 analyses the request. If the SME has not provided enough explanation for the new change request, CA1 can send the task back to the SME for clarification.

To clarify the document request, proceed as follows:

- 1 From your Windchill Homepage, click the Subject link of the Clarify Document Request status.

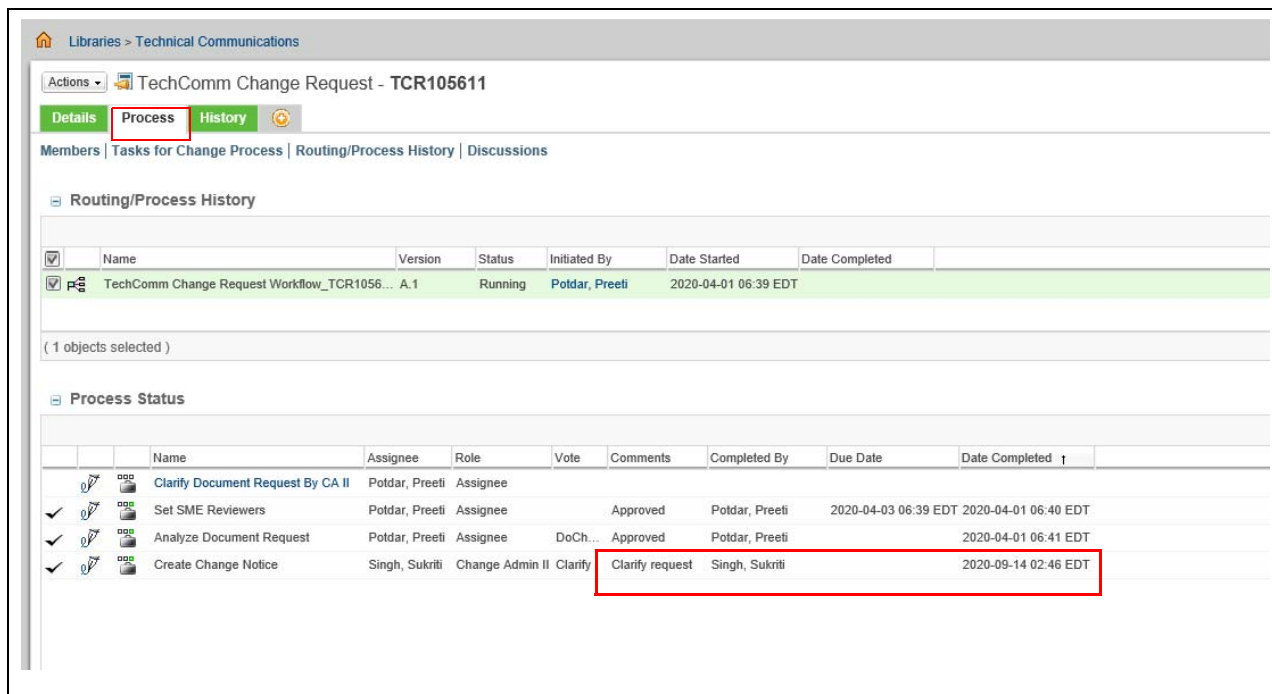
Figure 3-15: Clicking Clarify Document Request



The TechComm Change Request page opens.

- 2 Navigate to the **Process** tab. Scroll down to the Process Status section and check the comments column.

Figure 3-16: Navigating to Process Tab



- 3 Provide an appropriate clarification for raising the request by answering the questions raised by the CA1 by navigating to the **TechComm Change Request Workflow** page.

Figure 3-17: Provide Clarification

The screenshot shows the Windchill interface for the 'TechComm Change Request Workflow_TCR105611-Clarify Document Request By CA II' task. The 'Inputs' section is highlighted with a red box, containing the 'workitem_comment' text box (with the placeholder text 'Field trial needed more steps'), the 'Effectivity Date' (2020-04-30 00:00 EDT), and the 'Password' field (with a masked password '*****'). Below the password field, a message states 'Additional verification is required to complete this task.' The 'Complete Task' button is also highlighted with a red box.

Attributes	
workitem_pblink:	TechComm Change Request - TCR105611, Test 2 TCR
workitem_instructions:	Please provide more clarification on the Document Change Request as requested by Change Admin I
workitem_processname_monitor:	TechComm Change Request Workflow_TCR105611-Test 2 TCR
workitem_processinitiator:	Poldar, Preethi
workitem_processinitiated:	2020-04-01 06:39 EDT
workitem_assignee:	Poldar, Preethi
Role:	Assignee
workitem_priority:	Highest
workitem_deadline:	
Status:	Potential

Inputs

workitem_comment: Field trial needed more steps

Effectivity Date: 2020-04-30 00:00 EDT

*Password: *****

Additional verification is required to complete this task.

Save Complete Task

- 4 Enter your clarification in the workitem_comment text box and then enter your password.
- 5 Click the **Complete Task** button.

The Clarify Document Request task is now completed.

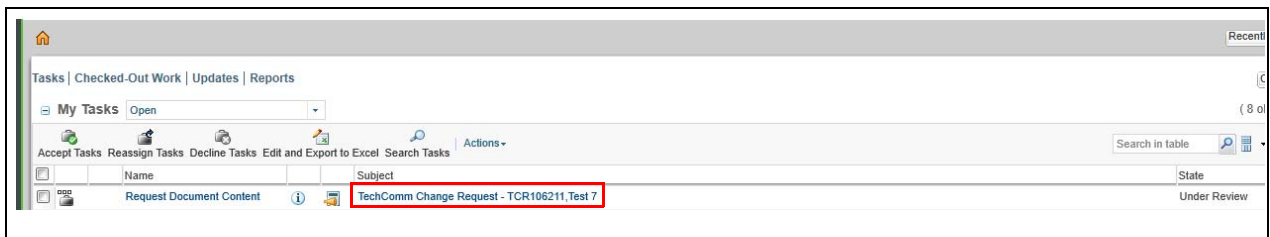
Request Document Content

If the SME has not provided any attachment, the CA1 can request for the same while analyzing the document request.

To complete the Request Document Content task, proceed as follows:

- 1 From your Windchill Homepage, click the Subject link of the Request Document Content status.

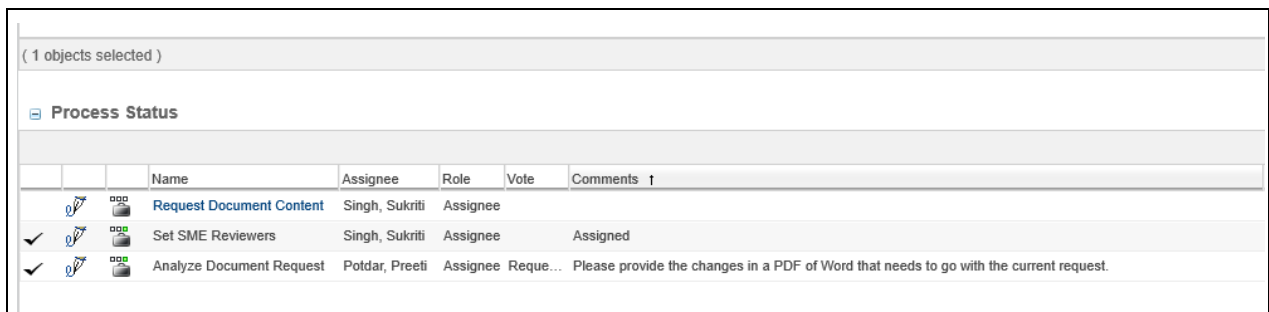
Figure 3-18: Requesting Content



The TechComm Change Request page opens.

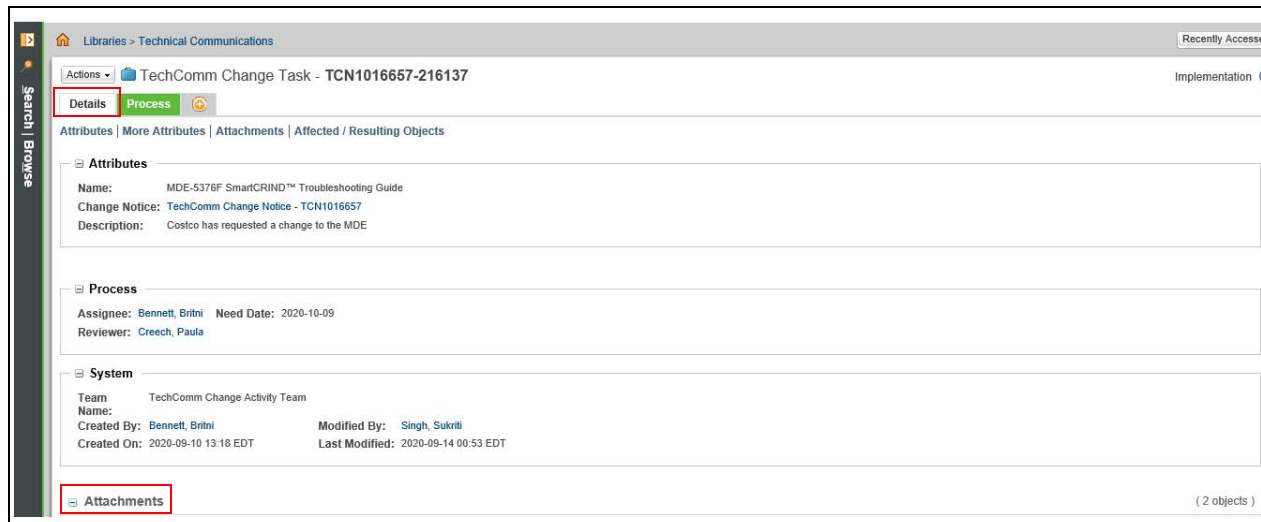
- 2 Navigate to the **Process** tab. Scroll down to the Process Status section and check the comments column.

Figure 3-19: Navigating to Process Status



- Click the **Details** tab and navigate to the TechComm Change Task page and go the “Attachments” section.

Figure 3-20: Navigating to Attachment Section



- Click the **Edit** button.

Figure 3-21: Adding Attachment



- A dialog box to your feedback opens. Click the **New Local File Attachment** button and browse to the location on your local machine and add the attachment(s) that can be in PDF, Word, JPEG, PNG, or Excel format.

- 6 After the attachment is uploaded, click **OK**.
- 7 Navigate to the Windchill Homepage by clicking the Home icon.
- 8 From the Windchill Home page, click the information button.

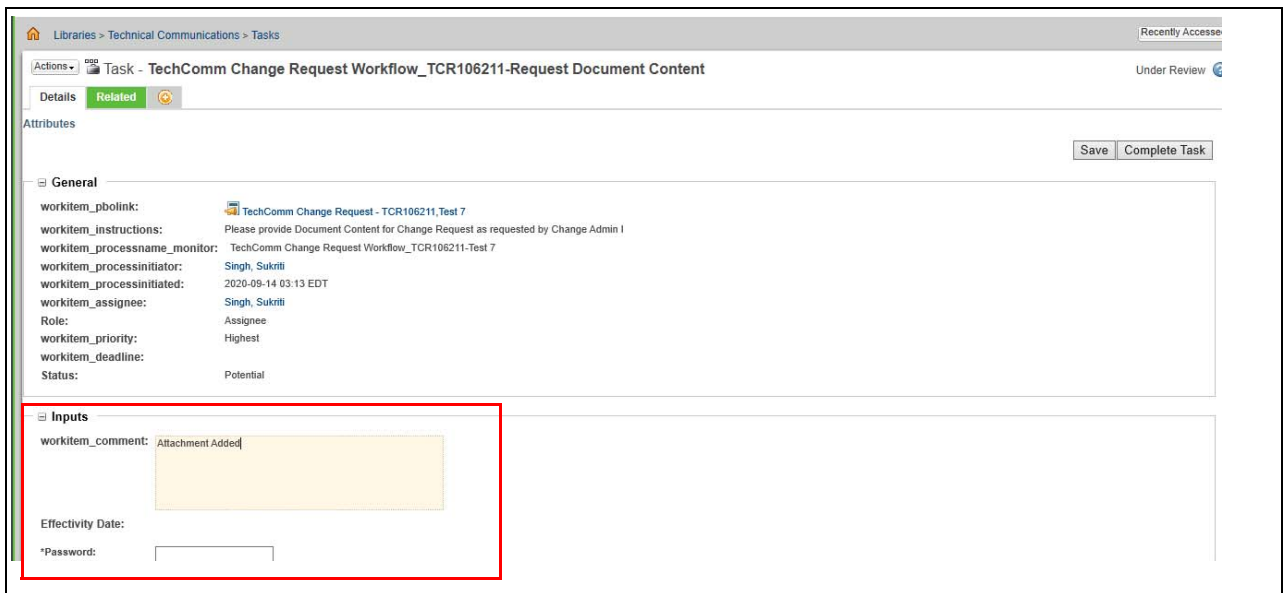
Figure 3-22: Clicking Information Button



The TechComm Change Activity Workflow page opens.

- 9 In the workitem_comment text box, enter your comment, enter your Windchill password, and then click **Complete Task**.

Figure 3-23: Completing Task



The Request Document Content task is now complete.

SME Provide Clarification to CA2

While creating a Change Notice, the CA2 might need more clarification or source material for the request. The CA2 can send a clarification task to the SME.

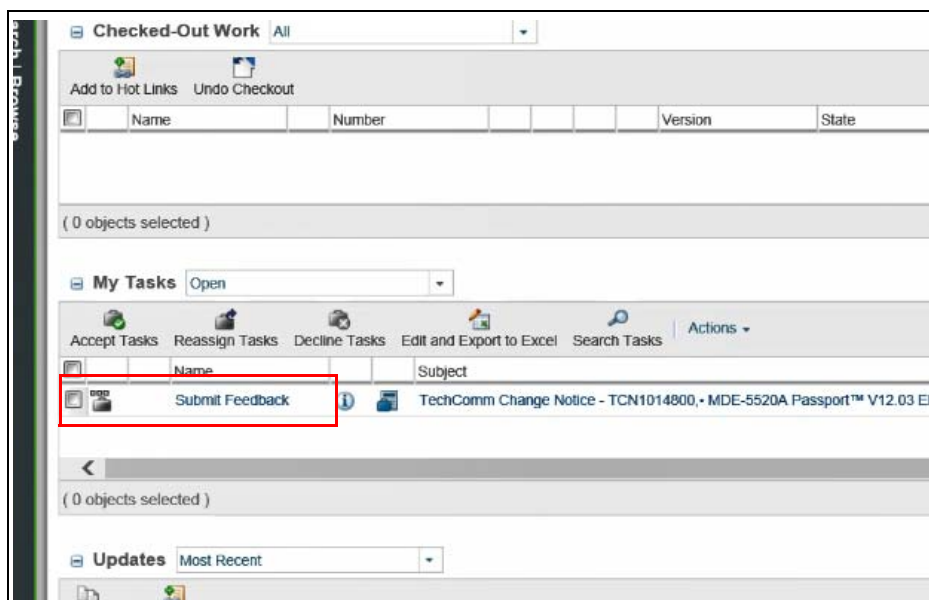
The steps are the same as mentioned in Clarify Document Request section.

Submit Feedback

The Submit Feedback Task is intended to collect feedback on quality and delivery time of the Technical Communications team for this request. The Submit Feedback Task is assigned to the requestor and all reviewers of the document immediately after the document is released.

- 1 Navigate to Windchill and select **Submit Feedback** from the My Tasks section.

Figure 3-24: Selecting Submit Feedback



- 2 When the task opens, respond to the questions in the Inputs section.

Figure 3-25: Responding To Questions

 A screenshot of the 'Submit Feedback' task details page in Windchill. The 'Inputs' section is highlighted with a red rectangle. It contains a 'Task Comments' text area and several survey questions:

- 'Were your comments documented correctly?': Yes (selected)
- 'Was this document delivered on time?': Yes (selected)
- 'Effectivity Date': 2020-03-27 00:00 EDT
- 'Password': (empty field)

 The page also shows task attributes such as Subject, Instructions, Process, Process Initiator, Process Initiated On, Assignee, Role, Priority, Deadline, and Status.

- **Task Comments:** Add any comments related to this specific document and your experience working with TechComm to complete it.
- **Were your comments documented correctly?:** Drop down selection
- **Was this document delivered on time?:** Drop down selection

3 Enter your password in the Password field, and then click **Complete Task**.

Figure 3-26: Completing Task

Finding the Windchill Status of a Document

Follow the instructions below to find the status of any document in Windchill.

- 1 From the Windchill homepage, type the document number into the search bar and select the <magnifying glass icon>.
- 2 Once the search results open, select the document **Number**.
- 3 Select **Changes**.
- 4 Select the TCN located in the 'Resulting from Change Notice' section.
- 5 Select the **Process** tab.
- 6 Select the (+) sign beside the document number in the 'Tasks for Change Process' section.
- 7 Once the tasks have expanded, scroll down the list until you find the participant without a check symbol beside their name. The document is currently with that participant.

How to Find a Document Number

Follow the instructions below to find the document number (MDE, PT, etc.) for any document in Windchill.

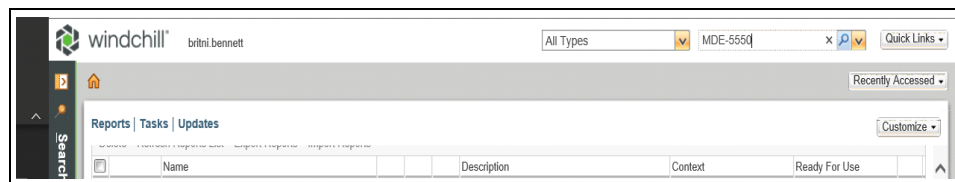
- 1 From the Windchill homepage, select **Browse > Technical Communications > Folders > Document Number Logs**.
- 2 Select the log for the type of document you are searching for (MDE, PT, etc.)
- 3 Search the Excel document in the log you selected for the document.

Finding the Most Recent Copy of a Document in Windchill

Note: This section is for locating the most recent version of a document during the Windchill cycle. The most recent published document is found in GOLD.

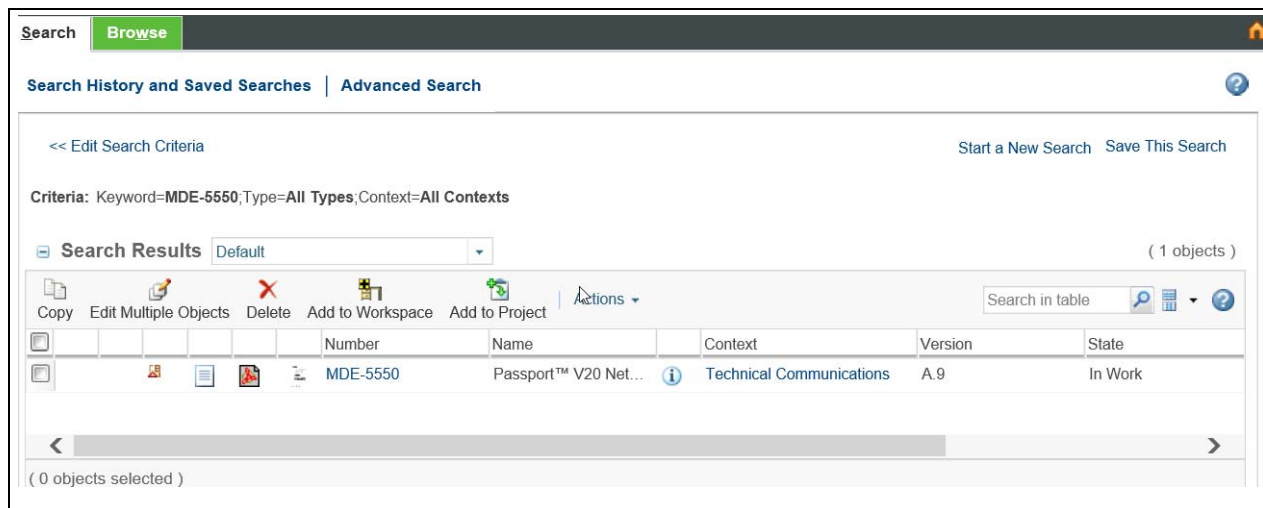
- 1 From the Windchill homepage, enter the document number into the search bar then click the magnifying glass symbol to search. For more information on finding the document number, refer to [“How to Find a Document Number”](#) on [page 3-15](#).

Figure 3-27: Entering Document Number in Search Bar



- 2 Select the PDF symbol associated with document with highest version (A, B, C, etc.).

Figure 3-28: Selecting PDF Symbol



- 3 Download the PDF to your PC.

Note: This document may not include pending comments from SMEs.

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