Business Administration for Windchill ProjectLink 10.0

Overview

Course Code  WBT-3161
Course Length  24 Hours

After completing this course, you will be well prepared to set up and manage a basic Windchill ProjectLink implementation at your company.

In this course, you will learn how to perform basic Windchill ProjectLink administration tasks. You will learn how to plan and create user accounts and groups, and how to plan and create information management storage strategies. Other topics will include life cycles, workflows, teams, and configuring domain policies. These skills are important because they enable a business administrator to configure Windchill ProjectLink to meet business needs.

At the end of each module, you will complete a skills assessment. The questions are used to help reinforce your understanding of the module topics and form the basis for review of any topics, if necessary.

Course Objectives

- Understand the processes involved in defining your business environment
- Identify the use of a Windchill Organization
- Create an organization
- Create and manage user accounts and groups
- Identify best practices for managing organizations, groups, and user accounts
- Identify contexts and their relationships
- Assign project and program creators
- Create and manage project and program contexts
- Identify Windchill object names and their corresponding object type class names
• Create Global Attributes
• Add attributes to a Windchill Type
• Create Windchill Types
• Identify and set object initialization rules
• Implement custom versioning sequences
• Create and define life cycle and workflow templates
• Associate life cycle and workflow templates
• Understand the Windchill domain policy architecture
• Define access control policies
• Identify individual access control permissions
• Administer and troubleshoot access control lists
• Define notification policies
• Define indexing policies
• Use Context Teams to apply access control
• Use Context Teams and team templates to conduct workflow role resolution
• Create and manage document templates within product, library, and organization contexts
• Identify how to create CAD document templates
• Create project and program context templates
• Create, manage, and edit promotion preferences
• Identify the promotion review and approval processes
• Use ModelCHECK validation during Check In
• Administer administrator-saved searches
• Administer user profiles
• Administer Windchill views
• Administer calendar functions
• Administer organization preferences
• Identify the report manager functions
• Identify visualization publishing controls
• Identify purge manager functions
• Audit system events
Prerequisites

- TRN-3148 Introduction to Windchill ProjectLink 10.0

Audience

- This course is intended for business administrators, system administrators, and project team leaders. Implementation team members, including user adoption team members, and those with general Windchill administration responsibilities will also benefit from taking this course.
<table>
<thead>
<tr>
<th>Module</th>
<th>1</th>
<th>Introduction to Windchill Business Administration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Module</td>
<td>2</td>
<td>Managing Participants</td>
</tr>
<tr>
<td>Module</td>
<td>3</td>
<td>Managing Contexts</td>
</tr>
<tr>
<td>Module</td>
<td>4</td>
<td>Managing Objects, Object Types, and Object Attributes</td>
</tr>
<tr>
<td>Module</td>
<td>5</td>
<td>Managing Object Type Behavior</td>
</tr>
<tr>
<td>Module</td>
<td>6</td>
<td>Automating Processes Using Life Cycles and Workflows</td>
</tr>
<tr>
<td>Module</td>
<td>7</td>
<td>Managing Domain Policies and Access Control</td>
</tr>
<tr>
<td>Module</td>
<td>8</td>
<td>Managing Teams</td>
</tr>
<tr>
<td>Module</td>
<td>9</td>
<td>Managing Organization Templates</td>
</tr>
<tr>
<td>Module</td>
<td>10</td>
<td>Administrative Support Tools</td>
</tr>
</tbody>
</table>