Overview

In this course, you will gain an understanding of basic Windchill PDMLink administration tasks. You will learn how to create user accounts and groups, and plan and create information management storage strategies. Other topics will include life cycles, workflows, teams, and configuring domain policies. These skills enable a business administrator to configure Windchill PDMLink to meet business needs. After completing this course, you will be well prepared to set up and manage a basic Windchill PDMLink implementation at your company.

At the end of each module, you will complete a set of review questions to reinforce critical topics from that module. At the end of the course, you will complete a course assessment in Pro/FICIENCY intended to evaluate your understanding of the course as a whole.

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 product and library creators
- Create and manage product and library contexts
- Distinguish Windchill object names and their corresponding object type class names
- Create Global Attributes
- Add attributes to a Windchill Type
- Create a Windchill Type
- 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 product and library context templates
• Create, manage, and edit promotion preferences
• Identify the promotion review and approval processes
• Identify the pre-configured Windchill change management functions
• Access business metrics from Change Monitor reports
• 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

- Any one of the following courses:
  - TRN-3805 Introduction to Windchill PDMLink 10.1 for Light Users
  - TRN-3806 Introduction to Windchill PDMLink 10.1 for Heavy Users
  - TRN-3807 Introduction to Windchill PDMLink 10.1 for the Implementation Team

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 PDMLink administration responsibilities will also benefit from taking this course.
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