In this course, you will learn the basic skills necessary to perform typical document management tasks using Windchill ProjectLink 11.0. Additionally, you will also learn document management skills such as creating and modifying documents. It also covers Desktop Integration to manage Microsoft Office documents in the Windchill environment as well as the basic operations to search, upload, check in, and check out Windchill documents using Desktop Integration from Microsoft Word, Excel, and PowerPoint. You will also learn how to manage Windchill documents from Windows Explorer.

This course constitutes a comprehensive review of the Standard Document Management functionality. In addition, the content is built to support topic-based course configurations. You will complete PTC University Proficiency skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.

This course has been developed using Windchill 11.0 F000.

Course Objectives

- Identify the capabilities of a standard document
- Set document preferences
- Create documents
- Create documents from templates
- Modify documents
- Create document relationships
- Install and configure Desktop Integration for Microsoft Office (Word, Excel, and PowerPoint) and Windows Explorer
- Connect to an active Windchill server using Desktop Integration
- Manage Windchill documents using Windows Explorer
Work with Windchill Context Views in Windows Explorer
• Compare Windchill document Content using Windows Explorer
• Manage Windchill documents in Microsoft Office using Desktop Integration
• Manage Windchill document attributes using Desktop
• Manage Windchill documents in Microsoft Outlook using Desktop Integration

Prerequisites

• Locate and View Information with Windchill ProjectLink 11.0

Audience

• This course is intended for any user who manages documents within Windchill ProjectLink and generates documentation in Microsoft Office, and who needs to manage the documentation in a Windchill PDMLink environment. People in related roles will also benefit from taking this course.
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