The PTC Windchill PDMLink 11.0 Document Management Process

Overview

Course Code WBT-4733-0
Course Length 1.5 Hours

In this process course, you will learn about the Authoring Document Process and basic skills necessary to perform typical document management tasks using Windchill PDMLink 11.0. Additionally, you will gain document management skills such as creating and modifying documents. You will also learn how to manage Windchill documents routing through a Promotion Request.

This course constitutes a review of the Standard Document Management functionality process. 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

- Understand the Document Management Process
- Identify the capabilities of a standard document
- Create documents
- Create documents from templates
- Modify documents
- Revise documents
- Create document relationships
- Set document preferences
- Connect to an active Windchill server using Desktop Integration
- Add to a baseline
- Create a promotion request
- Release the document using two different methods
- Create a promotion request
Prerequisites

- Locate and View Information with Windchill PDMLink 11.0

Audience

- This course is intended for any user who manages documents within Windchill PDMLink and manages documentation in Microsoft Office, who needs to understand the process. People in related roles will also benefit from taking this course.
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