

Business Administration of PTC Windchill

Overview

Course Length

24 Hours

In this course, you will gain an understanding of basic Windchill business administration tasks. You will learn how to create user accounts and groups and how to effectively plan and create information management storage strategies. Other topics will include life cycles, workflows, teams, and configuring domain policies. You will learn how to effectively administer the PTC Navigate business environment. These skills enable you to configure Windchill PDM to meet business needs. After completing this course, you will be well prepared to set up and manage a basic Windchill 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 PTC University Proficiency intended to evaluate your understanding of the course as a whole.

This course has been developed using Windchill.



SMART



CONNECTED



COMPLETE



FLEXIBLE

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 local, global, calculated, and alias attributes.
- Create a Windchill subtypes.



- Configure attribute layouts.
 - 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.
 - Understand change management flexibility.
 - Create change association rules.
 - Identify change objects, life cycles, workflows, and team templates.
 - 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.
 - Identify various PTC Navigate apps.
 - Navigate the PTC Navigate environment.
 - Use apps to search for information.
 - Configure app settings.
 - Configure common preferences for part-related apps.
 - Configure apps to display additional and custom attributes.
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Prerequisites

- Any one of the following courses: Introduction to Windchill PDM for non-CAD Users, Introduction to Windchill PDM for CAD Users, Introduction to Windchill PDM 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 administration responsibilities, will also benefit from taking this course.
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Agenda

Day 1

Module	1	Introduction to Windchill Business Administration
Module	2	Managing Participants
Module	3	Managing Contexts
Module	4	Managing Objects, Object Types, and Object Attributes

Day 2

Module	5	Managing Object Type Behavior
Module	6	Automating Processes Using Life Cycles and Workflows
Module	7	Managing Teams
Module	8	Managing Domain Policies and Access Control

Day 3

Module	9	Managing Organization Templates
Module	10	Implementing Promotion and Change Processes
Module	11	Administrative Support Tools
Module	12	Managing PTC Navigate Apps
