

# **Windchill PDMLink 10.2**

## **Curriculum Guide**

## Live Classroom Curriculum Guide

- Update to Windchill PDMLink 10.2 from Windchill PDMLink 9.0/9.1 for the End User
- Introduction to Windchill PDMLink 10.2 for Light Users
- Introduction to Windchill PDMLink 10.2 for Heavy Users
- Introduction to Windchill PDMLink 10.2 for the Implementation Team
- Creo Parametric Data Management with Windchill PDMLink 10.2
- Managing Design Variations with Windchill 10.2
- Update to Windchill PDMLink 10.2 from Windchill PDMLink 9.0/9.1 for the Administrator
- Business Administration of Windchill PDMLink 10.2
- Workflow Administration of Windchill 10.2
- System Administration of Windchill 10.2
- Introduction to Windchill MPMLink 10.2
- Administration of Windchill PartsLink Classification and Reuse 10.2
- Introduction to Windchill Corrective and Preventive Action (CAPA) 10.2
- Introduction to Windchill Customer Experience Management 10.2

# Update to Windchill PDMLink 10.2 from Windchill PDMLink 9.0/9.1 for the End User

## Overview

Course Code

TRN-4250-T

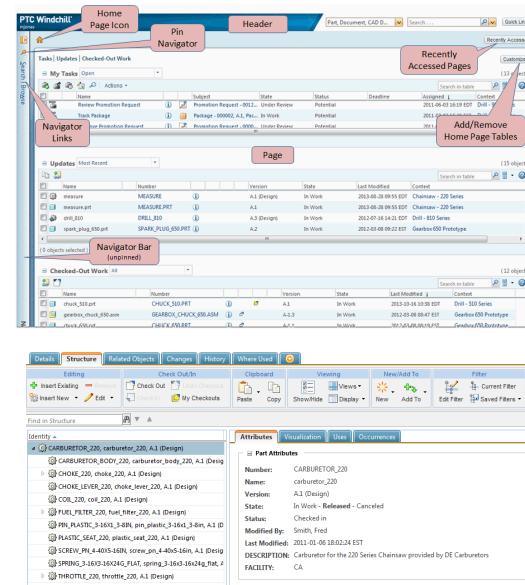
Course Length

1 Day

This course is designed for users who need to update their Windchill knowledge and skills from Windchill PDMLink 9.0 or 9.1 to work in a Windchill PDMLink 10.2 environment. After completing the course, you will be able to identify and use new Windchill PDMLink features and perform common tasks and activities available in Windchill PDMLink 9.0 or 9.1 using the new Windchill PDMLink 10.2 interface.

In this course, you will learn about the feature and interface updates to Windchill PDMLink 10.2 from Windchill PDMLink 9.0 and 9.1. You will also learn about general Windchill usability enhancements, new ways to work with Windchill business objects, and specific enhancements for managing documents. Finally, you will learn about changes regarding how you participate in processes, creating and delivering work packages, and updates to configuration management.

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

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- Describe the updates to the Windchill user interface including the home page, quick links, and Windchill navigator
- Configure your Windchill environment by customizing your home page, context pages, object information pages, and table columns and views
- Locate information by searching or browsing for Windchill objects and navigating through context page options
- Work with objects by using context actions and enhanced management tools such as multi-object edit, the Windchill clipboard, and event manager
- Manage Windchill documents directly from Microsoft Windows Explorer or Microsoft Office using the latest version of desktop integration
- Use the new create and update interfaces available for working with documents
- Describe enhancements when collaborating with others in the Windchill environment
- Review and manage processes and process history
- Manage and reassign workflow tasks, life cycles, and teams
- Create and manage work packages
- Describe enhancements to Windchill change management, including new wizard-based change management forms and being able to use the Windchill collector to quickly find and include related objects in complex dependency operations
- Use the new work items table to manage work being done on changes
- Create and manage variances, including waivers and deviations
- Describe enhancements to the Windchill product structure management, including BOM notes, effectivity processing, structure filtering, structure compare, and configurations and instances
- Explore and use the new Product Structure Browser interface

## Prerequisites

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- Working knowledge of Windchill PDMLink 9.0 or Windchill PDMLink 9.1

## Audience

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- This course is designed for users who need to update their Windchill knowledge and skills from Windchill PDMLink 9.0 or 9.1 to work in the Windchill PDMLink 10.2 environment

## Agenda

### Day 1

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Module	1	Windchill Usability Enhancements
Module	2	Working with Objects
Module	3	Document Management Enhancements
Module	4	Collaborating with Others
Module	5	Change Management Enhancements
Module	6	Product Structure Management Enhancements
Module	7	Creo Parametric Data Management Enhancements

# Introduction to Windchill PDMLink 10.2 for Light Users

## Overview

Course Code

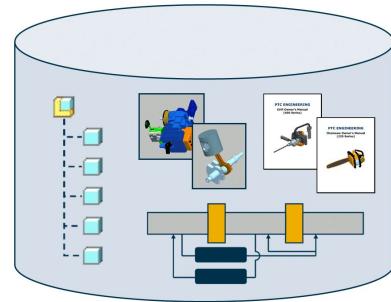
TRN-4260-T

Course Length

1 Day

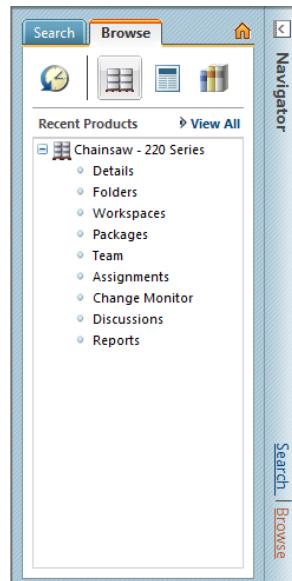
In this course, you will learn how to complete basic functions to navigate and view information within Windchill PDMLink. You will also learn how to access and navigate the Windchill PDMLink environment, view product information, use Windchill PDMLink's visualization tools, manage assigned tasks, and perform basic work management functions. In addition, you will learn how to use product information to make important business decisions. After completing the course, you will be able to complete basic Windchill PDMLink tasks and activities, as well as have a better understanding of how to use the Windchill PDMLink system.

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 Windchill PDMLink environment and terminology
- Locate product information
- View product information
- Understand visualization concepts and terminology
- Use Creo View Lite to view product information
- Use Windchill PDMLink tools to manage your work
- Participate in Windchill PDMLink processes



## **Prerequisites**

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- Basic browser and Web navigation skills

## **Audience**

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- This course is intended for users who need to access the Windchill PDMLink system to view information, perform system tasks, or use product information when making business decisions. People in related roles will also benefit from taking this course.

## Agenda

### Day 1

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Module	1	Introduction to the Windchill Environment
Module	2	Locating Information
Module	3	Viewing Information
Module	4	Introduction to Visualization
Module	5	Using Creo Elements View/Lite to View and Annotate Information
Module	6	Managing Your Work
Module	7	Participating in Processes

# Introduction to Windchill PDMLink 10.2 for Heavy Users

## Overview

Course Code

TRN-4261-T

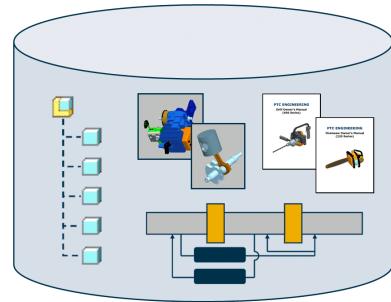
Course Length

2 Days

In this course, you will learn how to complete the day-to-day functions that enable you to create and manage product information with Windchill PDMLink. You will learn how to access and navigate the Windchill PDMLink environment, use Windchill PDMLink's visualization tools, manage product structures, and manage product information changes. Other topics include how to use Windchill PDMLink's communication and collaboration tools, and access user support functions and information.

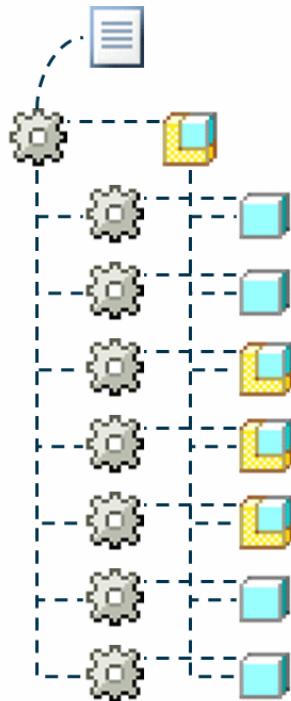
This course is designed for users who need to access the Windchill PDMLink system to view, create, and manage product information. For users who require CAD data management training, this course should be followed with the appropriate CAD data management course for the user's design tool. After completing the course, you will be able to complete Windchill PDMLink data management tasks and activities, as well as have a better understanding of how to use the Windchill PDMLink system.

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 Windchill PDMLink environment and terminology
- Locate and view product information
- View information using Creo View Lite
- Understand the principles of product structure management
- Create and manage product structures
- Create and manage documents
- Understand the Windchill PDMLink change process
- Initiate and implement product change
- Use Windchill PDMLink tools to manage your work



## Prerequisites

- Basic browser and Web navigation skills
- Basic understanding of product management processes and deliverables

## Audience

- This course is intended for users who need to access the Windchill PDMLink system to view, create, and manage product information.

## Agenda

### Day 1

Module	1	Introduction to the Environment
Module	2	Locating and Viewing Information
Module	3	Viewing Information using Creo View Lite
Module	4	Introduction to Product Structure Management
Module	5	Creating Product Structures
Module	6	Managing Product Structures

### Day 2

Module	7	Managing Structure Filters
Module	8	Managing Parts in Product Structure Explorer
Module	9	Creating and Managing Documents
Module	10	Introduction to the Change Process
Module	11	Initiating and Implementing Change
Module	12	Managing Your Work

# Introduction to Windchill PDMLink 10.2 for the Implementation Team

## Overview

Course Code

TRN-4262-T

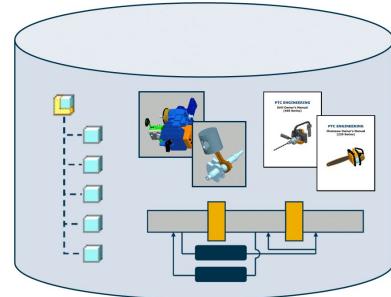
Course Length

2 Days

In this course, you will learn how to complete basic Windchill PDMLink functions. You will learn how to access and navigate the Windchill PDMLink environment, use Windchill PDMLink's visualization tools, manage CAD and product information, and manage product information changes. Other topics include how to use Windchill PDMLink's communication and collaboration tools, and access user support functions and information.

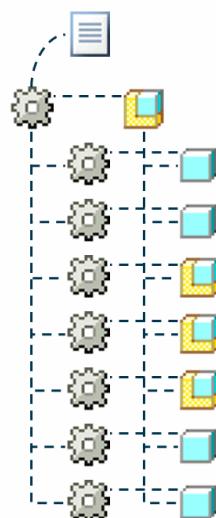
This course is designed to provide broad and basic coverage of Windchill PDMLink functionality to members of the Implementation Team. After completing the course, you will have a comprehensive understanding of Windchill PDMLink capabilities, which will enable you to contribute to the successful implementation of Windchill PDMLink to meet your company's Product Lifecycle Management goals.

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 Windchill PDMLink environment and terminology
- Locate and view product information
- View information using Creo View Lite
- Understand the principles of CAD data management
- Initiate new designs and share design information
- Modify and manage design information
- Understand the principles of product structure management
- Create and manage product structures
- Create and manage documents
- Understand the Windchill PDMLink change process
- Initiate and implement product change
- Use Windchill PDMLink tools to manage your work



## Prerequisites

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- Basic browser and Web navigation skills
- Basic understanding of product management processes and deliverables

## Audience

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- This course is intended for members of the Implementation Team who require a broad understanding of Windchill PDMLink functionality to successfully implement the system.

## Agenda

### Day 1

Module	1	Introduction to the Environment
Module	2	Locating and Viewing Information
Module	3	Viewing Information using Creo View Lite
Module	4	Getting Started with CAD Data Management
Module	5	Initiating New Designs and Sharing Design Data
Module	6	Modifying and Managing Design Information
Module	7	Introduction to Product Structure Management

### Day 2

Module	8	Creating and Managing Product Structures
Module	9	Creating and Managing Documents
Module	10	Introduction to the Change Process
Module	11	Initiating and Implementing Change
Module	12	Managing Your Work

# Creo Parametric Data Management with Windchill PDMLink

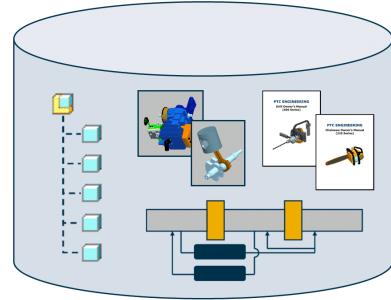
## 10.2

### Overview

Course Code	TRN-4300-T
Course Length	1 Day

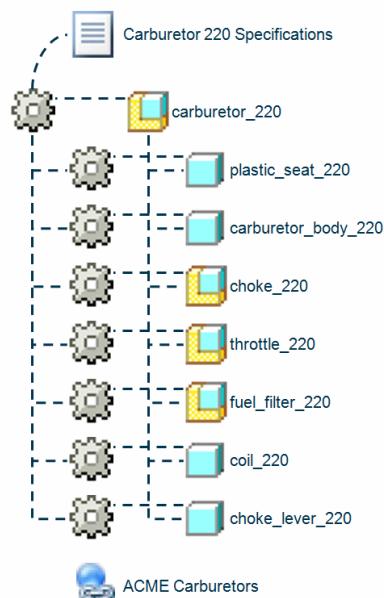
In this course, you will learn key capabilities and features of Windchill PDMLink CAD Data Management and how to use Windchill PDMLink to manage Creo Parametric design information. Specifically, you will focus on the day-to-day data management tasks required by the Creo Parametric user community, including how to use the CAD data structure to associate and build the product structure. You will also learn how to use Windchill to perform basic PDM functions on Creo Parametric CAD Documents and their associated Windchill parts. After completing this course, you will be prepared to complete basic Windchill PDMLink CAD data management tasks and activities. You will also have a better understanding of Windchill CAD data management processes.

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

- Locate design information
- View design information
- Create new designs and share design information
- Modify and manage existing design information
- Understand Windchill parts and their association to CAD documents
- Understand file relationships and dependencies
- Manage family tables
- Use workspace frames



## **Prerequisites**

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- A basic working knowledge of Creo Parametric 2.0
- Completion of any one of the following courses:
  - Introduction to Windchill PDMLink 10.2 for Light Users
  - Introduction to Windchill PDMLink 10.2 for Heavy Users
  - Introduction to Windchill PDMLink 10.2 for the Implementation Team

## **Audience**

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- This course is intended for end users and System Administrators. People in related roles will also benefit from taking this course.

## Agenda

### Day 1

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Module	1	Getting Started with Creo Parametric Data Management
Module	2	Initiating New Designs and Sharing Design Data
Module	3	Modifying and Managing Design Data
Module	4	Understanding File Relationships and Dependencies
Module	5	Managing Family Tables
Module	6	Managing CAD Data

# Managing Design Variations with Windchill 10.2

## Overview

Course Code

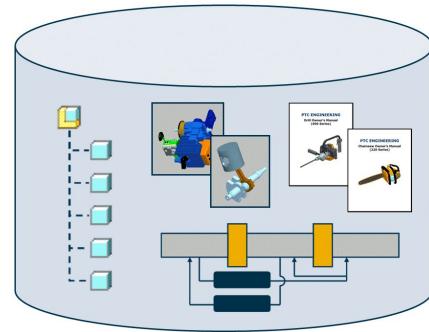
TRN-4307-T

Course Length

1 Day

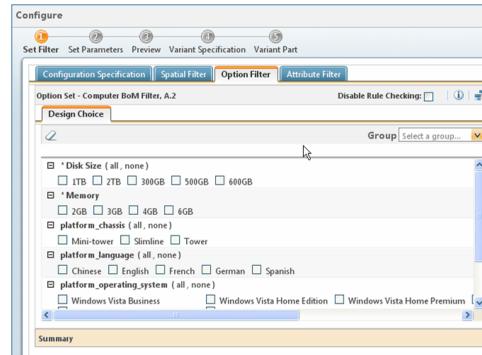
In this course, you will explore the capabilities, concepts, and processes for creating product options and variants. You will examine the environment and learn how to configure and organize your product structures to support your design variation requirements. Finally, you will learn how to view and filter product configurations based on choices and rules.

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 Windchill design variation capabilities
- Create and manage options and choices definitions
- Use option sets to organize product families
- Set up configurable product structures
- Filter a configurable product structure
- Create and manage variants



## Prerequisites

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- Completion of one of the following courses:
  - Introduction to Windchill PDMLink 10.2 for Heavy Users
  - Introduction to Windchill PDMLink 10.2 for the Implementation Team

## Audience

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- This course is intended for users that are familiar with Windchill product structures who will be developing the required options and variants.

## Agenda

### Day 1

Module	1	Introduction to Windchill Options and Variants
Module	2	Working With Enterprise-wide Definitions
Module	3	Using Option Sets to Establish Product Families
Module	4	Developing Configurable Product Structures
Module	5	Assigning Choices to Parts
Module	6	Configurable Product Structure Filtering
Module	7	Advanced Selection Logic for Configurable Modules
Module	8	Creating and Managing Variants

## Update to Windchill PDMLink 10.2 from Windchill PDMLink 9.0/9.1 for the Administrator

### Overview

Course Code

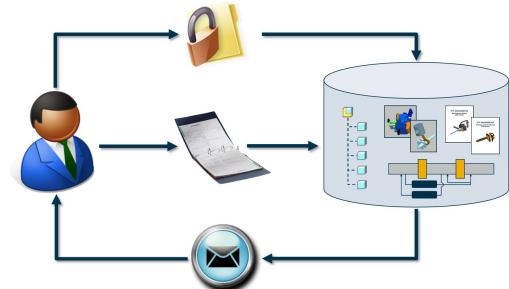
TRN-4320-T

Course Length

1 Day

In this course, you will review two main components: business administration enhancements and system administration enhancements. The business administration topics will include how to create new Windchill object types and add new attributes to objects more effectively, how to create and manage Windchill layouts as an alternative to Windchill customization, how to manage user profiles, how to administer Windchill workflows, and finally will review other miscellaneous business related enhancements. The system administration topics will highlight and cover enhancements related to the Windchill architecture, file vaulting and replication, system performance, and log and error reporting. This course is designed for administrators who need to update their Windchill knowledge and skills from Windchill PDMLink 9.0 or 9.1 to work in a Windchill PDMLink 10.2 environment.

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 Windchill 10.2 interface enhancements
- Understand the new Attribute and Type Management interface
- Create and add attributes to a Windchill type
- Create Windchill types
- Create and manage display layouts
- Modify layouts to make information editable
- Identify and use the new workflow process administration interface
- Use filters to search for workflow processes
- Analyze workflow process components



- Create and manage user profiles
- Assign users to profiles
- Identify the new charting feature
- Add charts to reports
- Explore Windchill architecture enhancements
- Identify new external file storage options and strategies
- Explore a distributed data replication architecture
- Monitor file vaults using new utilities
- Automatically set Windchill cache sizes using Windchill Configuration Assistant
- Identify queue performance enhancements
- Identify workflow queue pooling enhancements
- Identify new error reporting enhancements
- Analyze log files using the Log File Viewer
- Use System Configuration Collector to send error logs to PTC

## **Prerequisites**

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- Experience with the Windchill 9.0 or 9.1 business and system administration
- Familiarity with the Windows command prompt and the ability to execute basic scripts

## **Audience**

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- This course is intended for System Administrators and Application Developers. People in related roles will also benefit from taking this course.

## Agenda

### Day 1

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Module	1	Introduction to the Windchill 10.2 Environment
Module	2	Managing Objects, Object Types, and Object Attributes
Module	3	Managing Workflow Processes and Windchill Profiles
Module	4	Miscellaneous Business Administration Enhancements
Module	5	Managing Windchill Services
Module	6	File Vaulting and Replication Overview
Module	7	Performance Enhancements
Module	8	Log and Error Reporting Enhancements

# Business Administration of Windchill PDMLink 10.2

## Overview

Course Code	TRN-4330-T
Course Length	3 Days

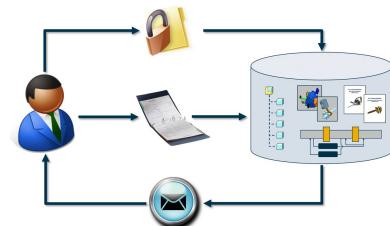
In this course, you will gain an understanding of basic Windchill PDMLink administration tasks. You will learn how to create user accounts and groups and how to effectively plan and create information management storage strategies. Other topics will include life cycles, workflows, teams, and configuring domain policies. These skills enable you 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 preconfigured 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

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- Any one of the following courses:
  - Introduction to Windchill PDMLink 10.2 for Light Users
  - Introduction to Windchill PDMLink 10.2 for Heavy Users
  - Introduction to Windchill PDMLink 10.2 for the Implementation Team

## Audience

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- 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.

## 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

# Workflow Administration of Windchill 10.2

## Overview

Course Code

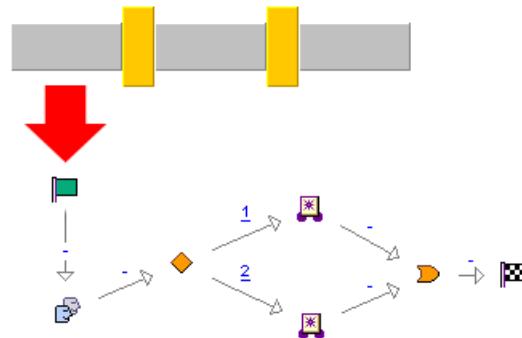
TRN-4339-T

Course Length

2 Days

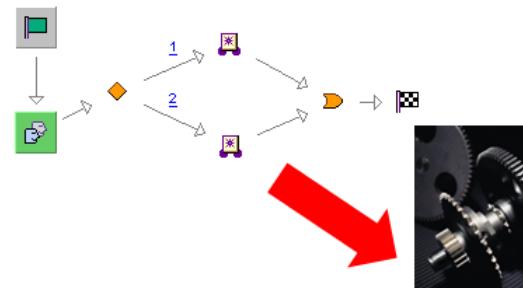
In this course, you will learn about Windchill workflow features and how to design, configure, and test workflow processes. After completing this course, you will be able to plan and configure workflow automation features to support your company's business processes.

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

- Describe the business objects that control and define the Windchill business process definition
- Identify the tools used to manage workflow templates
- Display, create, and modify workflow templates
- Determine the purpose and function of a pre-written workflow process
- Initiate, track, and manage workflow processes
- Define and configure assigned activities
- Use connectors in workflow templates
- Use links in workflow templates
- Group workflow nodes into block processes
- Create references to other workflow templates using proxy processes
- Send notifications from a workflow process
- Check an object in or out automatically in a workflow process
- Move a Windchill object through its life cycle using workflow processes
- Create a time delay in a workflow process
- Launch an external application from a workflow process
- Execute a Java expression within a workflow process
- Synchronize a workflow process with a system event



- Communicate with another server using a URL from a workflow process
- Configure basic and advanced life cycles
- Specify the workflows to be used in advanced life cycles
- Configure a promotion request
- Modify a workflow for use with promotion requests
- Use routing to reassign a life cycle in a project or program
- Create a life cycle and workflow for use with project routing

## Prerequisites

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- Business Administration of Windchill PDMLink 10.2

## Audience

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- This course is intended for Windchill business administrators and application developers. People in related roles will also benefit from taking this course.

## Agenda

### Day 1

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Module 1 Using Workflow Tools

Module 2 Defining Manual Tasks

### Day 2

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Module 3 Controlling Process Flow

Module 4 Simplifying Complex Templates

Module 5 Automating Tasks

Module 6 Using Workflow Templates

# System Administration of Windchill 10.2

## Overview

Course Code

TRN-4340-T

Course Length

3 Days

In this course, you will gain an understanding of how to perform routine Windchill system administration tasks, including how to manage Windchill services and optimize Windchill components for performance. You will focus on daily, weekly, and monthly system maintenance tasks required by the Windchill system administrators. You will also learn how to install and configure Windchill system components and how to implement file vaulting and content replication. Other topics that will be reviewed include managing an Oracle database, troubleshooting background queues, controlling system backup procedures, and setting up the client environment.

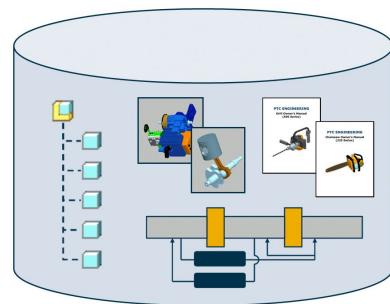
At the end of each module, you will complete a set of review questions to reinforce critical topics from that module. At the end of the course, you will complete a course assessment in Pro/FICIENCY intended to evaluate your understanding of the course as a whole.

Note: Due to the subject matter of this class, simulated software is used for Windchill installation to provide an accurate, effective, and efficient training experience that could not otherwise be duplicated in a standard classroom environment.



## Course Objectives

- Understand Windchill architecture
- Install and configure Windchill solutions
- Start and stop Windchill components
- Manage Windchill configuration properties
- Implement file vaulting and content replication
- Tune Windchill components for performance
- Tune Windchill workflows for performance
- Manage background queues
- Manage Oracle database
- Manage system backups
- Manage Windchill system logs and alerts
- Monitor daily, weekly, and monthly administration tasks
- Configure browser and JAVA settings for clients



## Prerequisites

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- Familiarity with the Windchill PDMLink 10.1 or Windchill ProjectLink 10.1 user interface
- Familiarity with the Windows command prompt and the ability to form and execute basic SQL statements

## Audience

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- This course is intended for System Administrators and Application Developers. People in related roles will also benefit from taking this course.

## Agenda

### Day 1

Module	1	Introduction to the Windchill System Environment
Module	2	Installing Windchill Components
Module	3	Managing Windchill Services
Module	4	Managing Windchill Properties
Module	5	File Vaulting and Replication Overview
Module	6	Implementing File Vaults
Module	7	Implementing Content Replication

### Day 2

Module	8	Tuning Windchill Server
Module	9	Managing Background Queues
Module	10	Tuning Workflow Processes
Module	11	Oracle Database Management
Module	12	Windchill Backup and Recovery

### Day 3

Module	13	Managing Log Files and Alerts
Module	14	System Monitoring — Daily Tasks
Module	15	System Monitoring — Weekly Tasks
Module	16	System Monitoring — Monthly Tasks
Module	17	Setting up the Client Environment

# Introduction to Windchill MPMLink 10.2

## Overview

Course Code

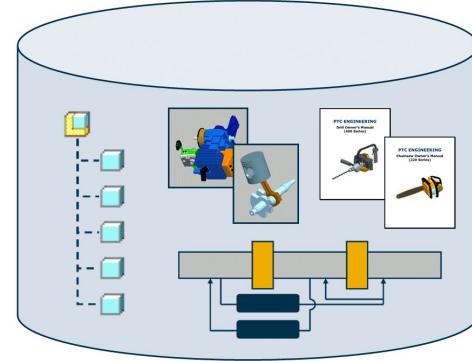
TRN-4264-T

Course Length

2 Days

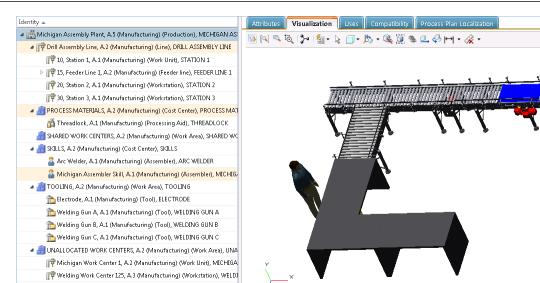
In this course, you will learn how to complete basic Windchill MPMLink functions. You will learn about MPMLink in the context of Manufacturing Process Management (MPM). You will also learn how to access and navigate the MPMLink environment, manage information, use MPMLink's visualization tools, and manage manufacturing changes attributed to product development. Other topics include how to use MPMLink to transform eBOMs to one or more mBOMs, and how to create process plans that consume the mBOM.

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

- Navigate the MPMLink environment
- Examine MPMLink utilities
- Transform an eBOM into an mBOM
- Create a process plan and associate it to the mBOM
- Create operations and allocate parts to them from the mBOM
- Allocate resources to the operations
- Use manufacturing standards in the operations
- Create illustrations and annotations for the operations
- View the production work instructions
- Create a time and cost roll-up
- Release process plans
- Change management overview



## Prerequisites

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- Introduction to Windchill PDMLink 10.2 for Heavy Users

## Audience

---

- This course is intended for manufacturing engineers and manufacturing personnel that develop the mBOM or process plans including NC programmers, tooling designers, quality engineers, and production personnel. People in related roles will also benefit from taking this course.

## Agenda

### Day 1

Module	1	Introduction to MPM and Windchill MPMLink
Module	2	Introduction to the Windchill MPMLink Environment
Module	3	MPMLink BOM Translation Tools and Concepts
Module	4	Transforming eBOM to mBOM
Module	5	Introduction to Manufacturing Resources and Manufacturing Standards

### Day 2

Module	6	Creating the Process Plan
Module	7	Allocating Objects to a Process Plan
Module	8	Refining the Process Plan
Module	9	Finalizing the Process Plan
Module	10	MPMLink Change Management

# Administration of Windchill PartsLink Classification and Reuse 10.2

## Overview

Course Code

TRN-4338EV

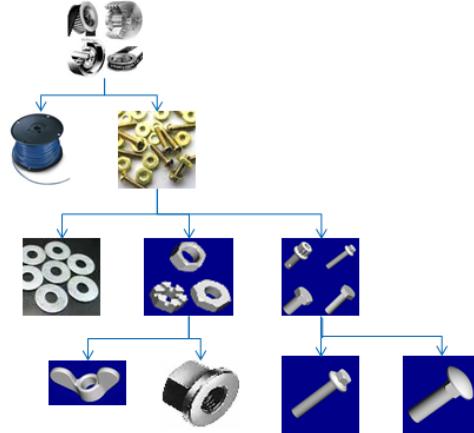
Course Length

8 hours

In this course, you will learn to use and administer Windchill PartsLink Classification and Reuse. You will begin by identifying classification search and the business uses it can serve. Then, you will use PartsLink to search for, browse to, create, and classify parts.

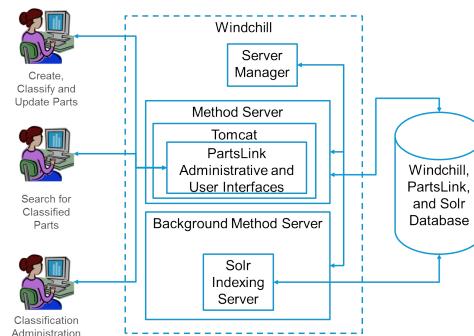
Later in the course, you will configure the Windchill PartsLink environment to set up a classification tree and classification binding attributes. Then, you will administer Windchill PartsLink by editing existing classification structures and creating new classification structures. Finally, you will learn to import a catalog of parts into Windchill using the import from spreadsheet functionality.

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

- Identify the need for parts classification
- Identify the parts of the Windchill user interface that are added with the optional PartsLink module
- Describe classification-based search capabilities
- Browse to classified parts
- Search for classified parts
- Refine search criteria
- Search for similar parts
- Create classified parts
- Classify existing parts
- Describe the Windchill PartsLink architecture
- Identify Windchill PartsLink objects and their purpose
- Identify the relationships between different PartsLink objects
- Identify the tools used to manage the PartsLink classification structure



- Identify best practices for designing a classification structure
- Use the Windchill Manage Classifications page to create and update classification structures
- Import a parts catalog to Windchill using an Excel spreadsheet

## Prerequisites

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- Business Administration of Windchill PDMLink 10.2

## Audience

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- This course is intended for classification administrators, business administrators, system administrators, and project team leaders. Implementation team members, including user adoption team members, and those with general Windchill PartsLink administration responsibilities will also benefit from taking this course.

## Agenda

### Day 1

---

Module	1	Introduction to Windchill PartsLink Classification and Reuse
Module	2	Classifying Parts
Module	3	Introduction to PartsLink Administration
Module	4	Creating and Maintaining a Windchill PartsLink Classification Structure

# Introduction to Windchill Corrective and Preventive Action (CAPA) 10.2

## Overview

Course Code

TRN-4285-T

Course Length

2 Days

In this process-based course, you will learn about the Windchill CAPA solution for corrective and preventive action. The course begins with introductory materials about Windchill and Windchill CAPA and then focuses on the Windchill CAPA process. You will review the primary process for a CAPA Request by taking on multiple roles to create and review the CAPA Request, perform root cause investigation, construct CAPA plans and complete CAPA plan approval, implement actions for the CAPA Request, and confirm and verify the adequate completion of tasks for the CAPA Request.

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 basics of Windchill and Windchill CAPA
- Locate and view data in Windchill CAPA
- Understand the CAPA process in Windchill CAPA
- Create a new CAPA Request
- Review a CAPA Request
- Perform CAPA root cause investigation
- Create CAPA plans
- Create CAPA Plan Approval Packages
- Complete CAPA Plan Approval
- Implement action plans for CAPA
- Confirm and verify the CAPA
- Understand important CAPA Work Management topics

## Prerequisites

---

- None

## Audience

---

- This course is intended for any Windchill CAPA user requiring guidance for using Windchill CAPA. People in related roles will also benefit from taking this course.

## Agenda

### Day 1

Module	1	Introduction to Windchill CAPA
Module	2	Locating Information
Module	3	Viewing Information
Module	4	CAPA Process Overview
Module	5	Request and Review CAPA

### Day 2

Module	6	Investigate Root Cause of CAPA
Module	7	Plan CAPA
Module	8	Implement CAPA
Module	9	Confirm and Verify CAPA
Module	10	Windchill CAPA Work Management

# Introduction to Windchill Customer Experience Management

## 10.2

### Overview

Course Code

TRN-4286-T

Course Length

2 Days

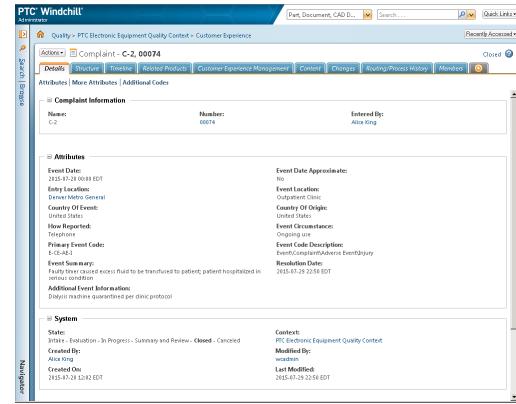
In this process-based course, you will learn about the Windchill Customer Experience Management solution for the uniform capture, codification, and processing of all customer feedback, including complaints. The course begins with introductory materials about Windchill and Windchill Customer Experience Management and then focuses on the Windchill Customer Experience Management process. You will review the primary process for a Customer Experience object by taking on multiple roles to create and evaluate the Customer Experience object, create general and product activities, complete the assigned activities and complete the Customer Experience object summary and review.

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.



## Course Objectives

- Understand the basics of Windchill and Windchill Customer Experience Management.
- Locate and view data in Windchill Customer Experience Management.
- Understand the Customer Experience Management process in Windchill Customer Experience Management.
- Create a new Customer Experience object.
- Evaluate a Customer Experience object.
- Assign general and product activities to a Customer Experience object.
- Complete all general and product activities.
- Complete summary and review details for a Customer Experience object.
- Understand important Customer Experience Management Work Management topics.



## Prerequisites

- None

## Audience

- This course is intended for any Windchill Customer Experience Management user requiring guidance for using Windchill Customer Experience Management. People in related roles will also benefit from taking this course.

## Agenda

### Day 1

Module	1	Introduction to Windchill Customer Experience Management
Module	2	Locating Information
Module	3	Viewing Information
Module	4	Customer Experience Management Process Overview
Module	5	Customer Experience Intake

### Day 2

Module	6	Customer Experience Evaluation
Module	7	Customer Experience In Progress (Activity Execution)
Module	8	Customer Experience Summary and Review
Module	9	Windchill Customer Experience Management Work Management

## **Web Based Curriculum Guide**

- Update to Windchill PDMLink 10.2 from Windchill PDMLink 9.0/9.1 for the End User
- Introduction to Windchill PDMLink 10.2 for Light Users
- Introduction to Windchill PDMLink 10.2 for Heavy Users
- Introduction to Windchill PDMLink 10.2 for the Implementation Team
- Creo Parametric Data Management with Windchill PDMLink 10.2
- Managing Design Variations with Windchill 10.2
- Update to Windchill PDMLink 10.2 from Windchill PDMLink 9.0/9.1 for the Administrator
- Business Administration of Windchill PDMLink 10.2
- System Administration of Windchill 10.2
- Locate and View Information with Windchill PDMLink 10.2
- Visualization with Creo View MCAD Lite 3.0 for Windchill PDMLink 10.2
- MCAD Data Management of Creo Parametric Designs with Windchill PDMLink 10.2
- Product Structure Management with Windchill PDMLink 10.2
- Design Variation Management with Windchill PDMLink 10.2

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- Standard Document Management with Windchill PDMLink 10.2
- Arbortext Document Management with Windchill PDMLink 10.2
- Change Management with Windchill PDMLink 10.2
- Work Management with Windchill PDMLink 10.2
- Update to Windchill PDMLink 10.2 from Windchill PDMLink 10.1 for the End User
- Creo Elements/Direct Data Management with Windchill PDMLink 10.2
- Update to Windchill PDMLink 10.2 from Windchill PDMLink 10.0 for the Administrator
- Update to Windchill PDMLink 10.2 from Windchill PDMLink 10.1 for the Administrator
- Creo Parametric Data Administration in Windchill 10.2
- Arbortext Data Administration in Windchill 10.2
- Introduction to Windchill PartsLink Classification and Reuse 10.2
- Administration of Windchill PartsLink Classification and Reuse 10.2
- ECAD Data Administration in Windchill PDMLink 10.2
- Introduction to Windchill PDMLink 10.2 for ECAD Users
- ECAD Data Management with Windchill PDMLink 10.2

- Desktop Integration with Windchill PDMLink 10.2
- AutoCAD Data Management with Windchill PDMLink 10.2
- SolidWorks Data Management with Windchill PDMLink 10.2
- Autodesk Inventor Data Management with Windchill PDMLink 10.2
- CATIA Data Management with Windchill PDMLink 10.2
- The Windchill PDMLink 10.2 Change Management Process
- NX Data Management with Windchill PDMLink 10.2
- Introduction to Windchill MPMLink 10.2
- Windchill PDMLink 10.2 and Windchill ProjectLink 10.2 Interoperability
- The Windchill PDMLink 10.2 MCAD Data Management Process for Creo Parametric
- Introduction to Windchill Corrective and Preventive Action (CAPA) 10.2
- Introduction to Windchill Customer Experience Management 10.2

# Update to Windchill PDMLink 10.2 from Windchill PDMLink 9.0/9.1 for the End User

## Overview

Course Code

WBT-4250-0

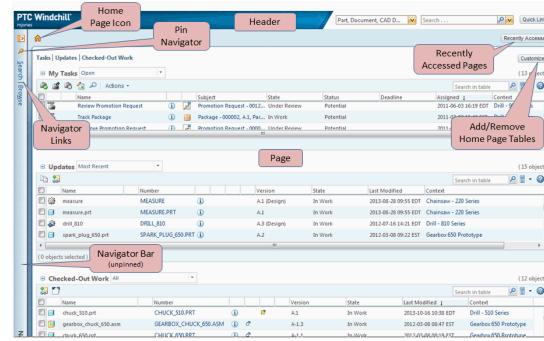
Course Length

8 Hours

This course is designed for users who need to update their Windchill knowledge and skills from Windchill PDMLink 9.0 or 9.1 to work in a Windchill PDMLink 10.2 environment. After completing the course, you will be able to identify and use new Windchill PDMLink features and perform common tasks and activities available in Windchill PDMLink 9.0 or 9.1 using the new Windchill PDMLink 10.2 interface.

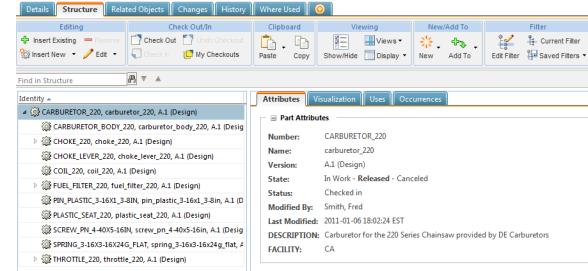
In this course, you will learn about the feature and interface updates to Windchill PDMLink 10.2 from Windchill PDMLink 9.0 and 9.1. You will also learn about general Windchill usability enhancements, new ways to work with Windchill business objects, and specific enhancements for managing documents. Finally, you will learn about changes regarding how you participate in processes, creating and delivering work packages, and updates to configuration management.

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

- Describe the updates to the Windchill user interface including the home page, quick links, and Windchill navigator
- Configure your Windchill environment by customizing your home page, context pages, object information pages, and table columns and views
- Locate information by searching or browsing for Windchill objects and navigating through context page options
- Work with objects by using context actions and enhanced management tools such as multi-object edit, the Windchill clipboard, and event manager
- Manage Windchill documents directly from Microsoft Windows Explorer or Microsoft Office using the latest version of desktop integration
- Use the new create and update interfaces available for working with documents
- Describe enhancements when collaborating with others in the Windchill environment
- Review and manage processes and process history
- Manage and reassign workflow tasks, life cycles, and teams
- Create and manage work packages
- Describe enhancements to Windchill change management, including new wizard-based change management forms and being able to use the Windchill collector to quickly find and include related objects in complex dependency operations
- Use the new work items table to manage work being done on changes
- Create and manage variances, including waivers and deviations
- Describe enhancements to the Windchill product structure management, including BOM notes, effectivity processing, structure filtering, structure compare, and configurations and instances
- Explore and use the new Product Structure Browser interface



## Prerequisites

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- Working knowledge of Windchill PDMLink 9.0 or Windchill PDMLink 9.1

## Audience

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- This course is designed for users who need to update their Windchill knowledge and skills from Windchill PDMLink 9.0 or 9.1 to work in the Windchill PDMLink 10.2 environment

## Table of Contents

Module	1	Windchill Usability Enhancements
Module	2	Working with Objects
Module	3	Document Management Enhancements
Module	4	Collaborating with Others
Module	5	Change Management Enhancements
Module	6	Product Structure Management Enhancements
Module	7	Creo Parametric Data Management Enhancements
Module	8	Appendix – Update to Windchill PDMLink 10.2 from Windchill PDMLink 9.0-9.1 for the End User

# Introduction to Windchill PDMLink 10.2 for Light Users

## Overview

Course Code

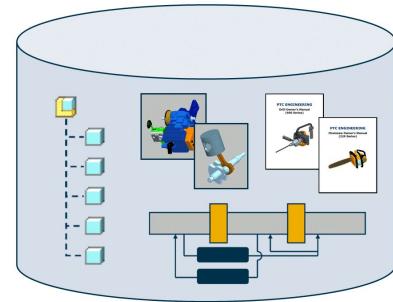
WBT-4260-0

Course Length

8 Hours

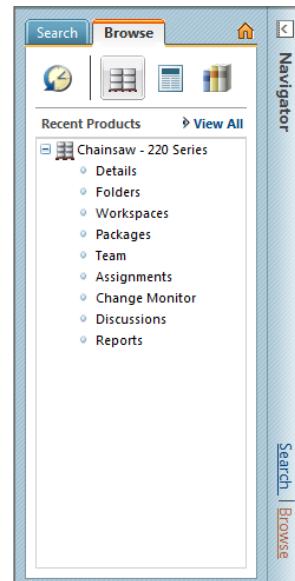
In this course, you will learn how to complete basic functions to navigate and view information within Windchill PDMLink. You will also learn how to access and navigate the Windchill PDMLink environment, view product information, use Windchill PDMLink's visualization tools, manage assigned tasks, and perform basic work management functions. In addition, you will learn how to use product information to make important business decisions. After completing the course, you will be able to complete basic Windchill PDMLink tasks and activities, as well as have a better understanding of how to use the Windchill PDMLink system.

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 Windchill PDMLink environment and terminology
- Locate product information
- View product information
- Understand visualization concepts and terminology
- Use Creo View Lite to view product information
- Use Windchill PDMLink tools to manage your work
- Participate in Windchill PDMLink processes



## Prerequisites

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- Basic browser and Web navigation skills

## Audience

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- This course is intended for users who need to access the Windchill PDMLink system to view information, perform system tasks, or use product information when making business decisions. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Introduction to the Windchill Environment
Module	2	Locating Information
Module	3	Viewing Information
Module	4	Introduction to Visualization
Module	5	Using Creo View Lite to View and Annotate Information
Module	6	Managing Your Work
Module	7	Participating in Processes

# Introduction to Windchill PDMLink 10.2 for Heavy Users

## Overview

Course Code

WBT-4261-0

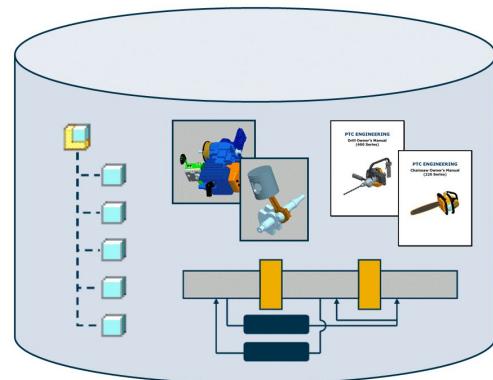
Course Length

16 Hours

In this course, you will learn how to complete the day-to-day functions that enable you to create and manage product information with Windchill PDMLink. You will learn how to access and navigate the Windchill PDMLink environment, use Windchill PDMLink's visualization tools, manage product structures, and manage product information changes. Other topics include how to use Windchill PDMLink's communication and collaboration tools, and access user support functions and information.

This course is designed for users who need to access the Windchill PDMLink system to view, create, and manage product information. For users who require CAD data management training, this course should be followed with the appropriate CAD data management course for the user's design tool. After completing the course, you will be able to complete Windchill PDMLink data management tasks and activities, as well as have a better understanding of how to use the Windchill PDMLink system.

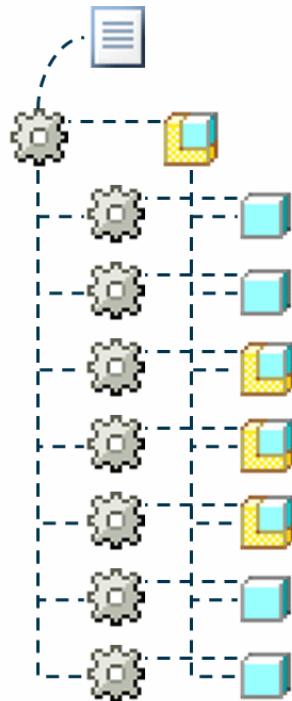
At the end of each module, you will complete a set of review questions to reinforce critical topics from that module. At the end of the course, you will complete a course assessment in Pro/FICIENCY intended to evaluate your understanding of the course as a whole.



## Course Objectives

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- Understand the Windchill PDMLink environment and terminology
- Locate and view product information
- View information using Creo View Lite
- Understand the principles of product structure management
- Create and manage product structures
- Create and manage documents
- Understand the Windchill PDMLink change process
- Initiate and implement product change
- Use Windchill PDMLink tools to manage your work



## Prerequisites

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- Basic browser and Web navigation skills
- Basic understanding of product management processes and deliverables

## Audience

---

- This course is intended for users who need to access the Windchill PDMLink system to view, create, and manage product information.

## Table of Contents

Module	1	Introduction to the Windchill Environment
Module	2	Locating and Viewing Information
Module	3	Viewing Information using Creo View Lite
Module	4	Introduction to Product Structure Management
Module	5	Creating Product Structures
Module	6	Managing Product Structures
Module	7	Managing Structure Filters
Module	8	Managing Parts in Product Structure Explorer
Module	9	Creating and Managing Documents
Module	10	Introduction to the Change Process
Module	11	Initiating and Implementing Change
Module	12	Managing Your Work

# Introduction to Windchill PDMLink 10.2 for the Implementation Team

## Overview

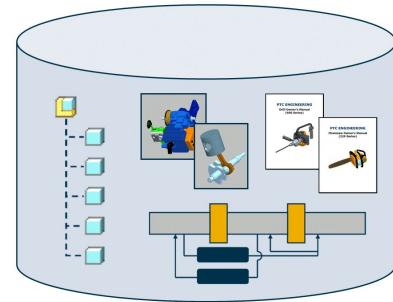
Course Code WBT-4262-0

Course Length 16 Hours

In this course, you will learn how to complete basic Windchill PDMLink functions. You will learn how to access and navigate the Windchill PDMLink environment, use Windchill PDMLink's visualization tools, manage CAD and product information, and manage product information changes. Other topics include how to use Windchill PDMLink's communication and collaboration tools, and access user support functions and information.

This course is designed to provide broad and basic coverage of Windchill PDMLink functionality to members of the Implementation Team. After completing the course, you will have a comprehensive understanding of Windchill PDMLink capabilities, which will enable you to contribute to the successful implementation of Windchill PDMLink to meet your company's Product Lifecycle Management goals.

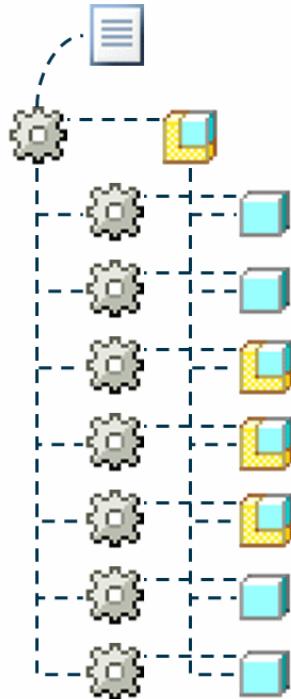
At the end of each module, you will complete a set of review questions to reinforce critical topics from that module. At the end of the course, you will complete a course assessment in Pro/FICIENCY intended to evaluate your understanding of the course as a whole.



## Course Objectives

---

- Understand the Windchill PDMLink environment and terminology
- Locate and view product information
- View information using Creo View Lite
- Understand the principles of CAD data management
- Initiate new designs and share design information
- Modify and manage design information
- Understand the principles of product structure management
- Create and manage product structures
- Create and manage documents
- Understand the Windchill PDMLink change process
- Initiate and implement product change
- Use Windchill PDMLink tools to manage your work



## Prerequisites

---

- Basic browser and Web navigation skills
- Basic understanding of product management processes and deliverables

## Audience

---

- This course is intended for members of the Implementation Team who require a broad understanding of Windchill PDMLink functionality to successfully implement the system.

## Table of Contents

Module	1	Introduction to the Windchill Environment
Module	2	Locating and Viewing Information
Module	3	Viewing Information using Creo View Lite
Module	4	Getting Started with CAD Data Management
Module	5	Initiating New Designs and Sharing Design Data
Module	6	Modifying and Managing Design Information
Module	7	Introduction to Product Structure Management
Module	8	Creating and Managing Product Structures
Module	9	Creating and Managing Documents
Module	10	Introduction to the Change Process
Module	11	Initiating and Implementing Change
Module	12	Managing Your Work

# Creo Parametric Data Management with Windchill PDMLink

## 10.2

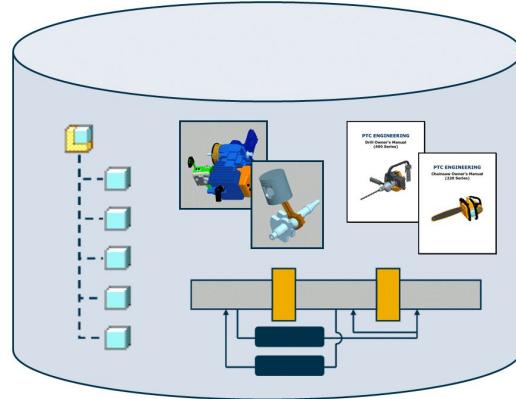
### Overview

Course Code WBT-4300-0

Course Length 8 Hours

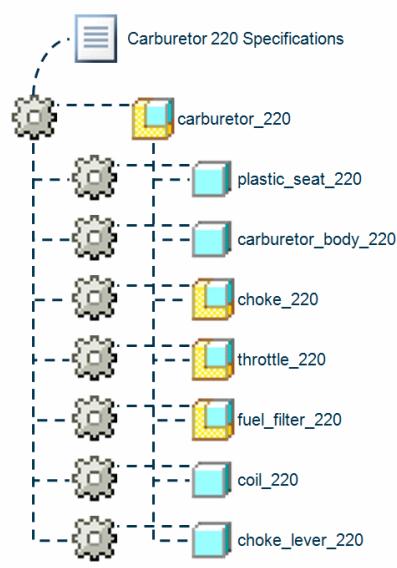
In this course, you will learn key capabilities and features of Windchill PDMLink CAD Data Management and how to use Windchill PDMLink to manage Creo Parametric design information. Specifically, you will focus on the day-to-day data management tasks required by the Creo Parametric user community, including how to use the CAD data structure to associate and build the product structure. You will also learn how to use Windchill to perform basic PDM functions on Creo Parametric CAD Documents and their associated Windchill parts. After completing this course, you will be prepared to complete basic Windchill PDMLink CAD data management tasks and activities. You will also have a better understanding of Windchill CAD data management processes.

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

- Locate design information
- View design information
- Create new designs and share design information
- Modify and manage existing design information
- Understand Windchill parts and their association to CAD documents
- Understand file relationships and dependencies
- Manage family tables
- Use workspace frames



## Prerequisites

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- A basic working knowledge of Creo Parametric 2.0
- Completion of any one of the following courses:
  - Introduction to Windchill PDMLink 10.2 for Light Users
  - Introduction to Windchill PDMLink 10.2 for Heavy Users
  - Introduction to Windchill PDMLink 10.2 for the Implementation Team

## Audience

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- This course is intended for end users and System Administrators. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Getting Started with Creo Parametric Data Management
Module	2	Initiating New Designs and Sharing Design Data
Module	3	Modifying and Managing Design Data
Module	4	Understanding File Relationships and Dependencies
Module	5	Managing Family Tables
Module	6	Managing CAD Data

# Managing Design Variations with Windchill 10.2

## Overview

Course Code

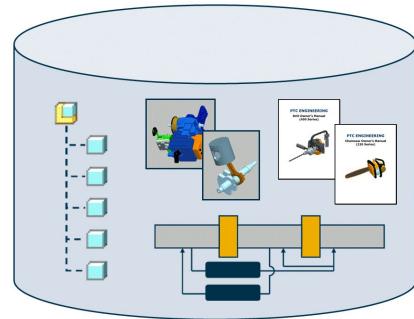
WBT-4307-0

Course Length

8 Hours

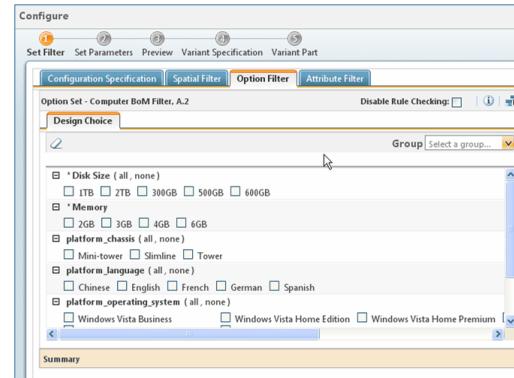
In this course, you will explore the capabilities, concepts, and processes for creating product options and variants. You will examine the environment and learn how to configure and organize your product structures to support your design variation requirements. Finally, you will learn how to view and filter product configurations based on choices and rules.

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 Windchill design variation capabilities
- Create and manage options and choices definitions
- Use option sets to organize product families
- Set up configurable product structures
- Filter a configurable product structure
- Create and manage variants



## Prerequisites

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- Completion of one of the following courses:
  - Introduction to Windchill PDMLink 10.2 for Heavy Users
  - Introduction to Windchill PDMLink 10.2 for the Implementation Team

## Audience

---

- This course is intended for users that are familiar with Windchill product structures who will be developing the required options and variants.

## Table of Contents

Module	1	Introduction to Windchill Options and Variants
Module	2	Working With Enterprise-wide Definitions
Module	3	Using Option Sets to Establish Product Families
Module	4	Developing Configurable Product Structures
Module	5	Assigning Choices to Parts
Module	6	Configurable Product Structure Filtering
Module	7	Advanced Selection Logic for Configurable Modules
Module	8	Creating and Managing Variants

## Update to Windchill PDMLink 10.2 from Windchill PDMLink 9.0/9.1 for the Administrator

### Overview

Course Code

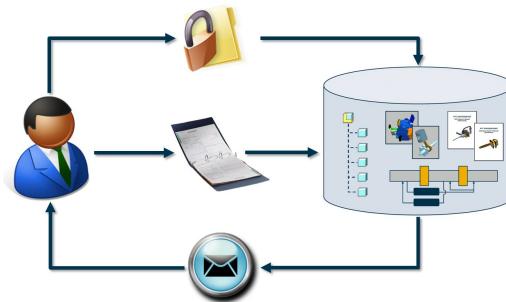
WBT-4320-0

Course Length

8 Hours

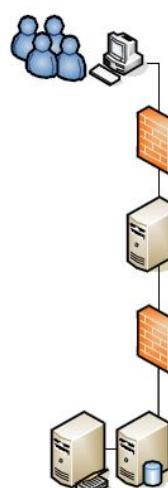
In this course, you will review two main components: business administration enhancements and system administration enhancements. The business administration topics will include how to create new Windchill object types and add new attributes to objects more effectively, how to create and manage Windchill layouts as an alternative to Windchill customization, how to manage user profiles, how to administer Windchill workflows, and finally will review other miscellaneous business related enhancements. The system administration topics will highlight and cover enhancements related to the Windchill architecture, file vaulting and replication, system performance, and log and error reporting. This course is designed for administrators who need to update their Windchill knowledge and skills from Windchill PDMLink 9.0 or 9.1 to work in a Windchill PDMLink 10.2 environment.

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 Windchill 10.2 interface enhancements
- Understand the new Attribute and Type Management interface
- Create and add attributes to a Windchill type
- Create Windchill types
- Create and manage display layouts
- Modify layouts to make information editable
- Identify and use the new workflow process administration interface
- Use filters to search for workflow processes
- Analyze workflow process components



- Create and manage user profiles
- Assign users to profiles
- Identify the new charting feature
- Add charts to reports
- Explore Windchill architecture enhancements
- Identify new external file storage options and strategies
- Explore a distributed data replication architecture
- Monitor file vaults using new utilities
- Automatically set Windchill cache sizes using Windchill Configuration Assistant
- Identify queue performance enhancements
- Identify workflow queue pooling enhancements
- Identify new error reporting enhancements
- Analyze log files using the Log File Viewer
- Use System Configuration Collector to send error logs to PTC

---

## Prerequisites

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- Experience with the Windchill 9.0 or 9.1 business and system administration
- Familiarity with the Windows command prompt and the ability to execute basic scripts

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## Audience

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- This course is intended for System Administrators and Application Developers. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Introduction to the Windchill 10.2 Environment
Module	2	Managing Objects, Object Types, and Object Attributes
Module	3	Managing Workflow Processes and Windchill Profiles
Module	4	Miscellaneous Business Administration Enhancements
Module	5	Managing Windchill Services
Module	6	File Vaulting and Replication Overview
Module	7	Performance Enhancements
Module	8	Log and Error Reporting Enhancements

# Business Administration of Windchill PDMLink 10.2

## Overview

Course Code

WBT-4330-0

Course Length

24 Hours

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 how to effectively plan and create information management storage strategies. Other topics will include life cycles, workflows, teams, and configuring domain policies. These skills enable you 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 preconfigured 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

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- Any one of the following courses:
  - Introduction to Windchill PDMLink 10.2 for Light Users
  - Introduction to Windchill PDMLink 10.2 for Heavy Users
  - Introduction to Windchill PDMLink 10.2 for the Implementation Team

## Audience

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- 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.

## Table of Contents

Module	1	Introduction to Windchill Business Administration
Module	2	Managing Participants
Module	3	Managing Contexts
Module	4	Managing Objects, Object Types, and Object Attributes
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
Module	9	Managing Organization Templates
Module	10	Implementing Promotion and Change Processes
Module	11	Administrative Support Tools

# System Administration of Windchill 10.2

## Overview

Course Code

WBT-4340-0

Course Length

24 Hours

In this course, you will gain an understanding of how to perform routine Windchill system administration tasks, including how to manage Windchill services and optimize Windchill components for performance. You will focus on daily, weekly, and monthly system maintenance tasks required by the Windchill system administrators. You will also learn how to install and configure Windchill system components and how to implement file vaulting and content replication. Other topics that will be reviewed include managing an Oracle database, troubleshooting background queues, controlling system backup procedures, and setting up the client environment.

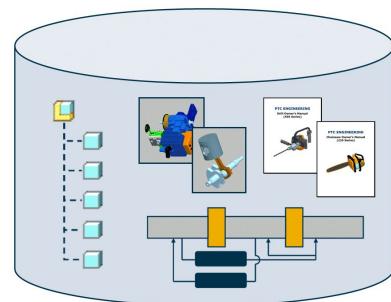
At the end of each module, you will complete a set of review questions to reinforce critical topics from that module. At the end of the course, you will complete a course assessment in Pro/FICIENCY intended to evaluate your understanding of the course as a whole.

Note: Due to the subject matter of this class, simulated software is used for Windchill installation to provide an accurate, effective, and efficient training experience that could not otherwise be duplicated in a standard classroom environment.



## Course Objectives

- Understand Windchill architecture
- Install and configure Windchill solutions
- Start and stop Windchill components
- Manage Windchill configuration properties
- Implement file vaulting and content replication
- Tune Windchill components for performance
- Tune Windchill workflows for performance
- Manage background queues
- Manage Oracle database
- Manage system backups
- Manage Windchill system logs and alerts
- Monitor daily, weekly, and monthly administration tasks
- Configure browser and JAVA settings for clients



## **Prerequisites**

---

- Familiarity with the Windchill PDMLink 10.1 or Windchill ProjectLink 10.1 user interface
- Familiarity with the Windows command prompt and the ability to form and execute basic SQL statements

## **Audience**

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- This course is intended for System Administrators and Application Developers. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Introduction to the Windchill System Environment
Module	2	Installing Windchill Components
Module	3	Managing Windchill Services
Module	4	Managing Windchill Properties
Module	5	File Vaulting and Replication Overview
Module	6	Implementing File Vaults
Module	7	Implementing Content Replication
Module	8	Tuning Windchill Server
Module	9	Managing Background Queues
Module	10	Tuning Workflow Processes
Module	11	Oracle Database Management
Module	12	Windchill Backup and Recovery
Module	13	Managing Log Files and Alerts
Module	14	System Monitoring — Daily Tasks
Module	15	System Monitoring — Weekly Tasks
Module	16	System Monitoring — Monthly Tasks
Module	17	Setting up the Client Environment

# Locate and View Information with Windchill PDMLink 10.2

## Overview

Course Code

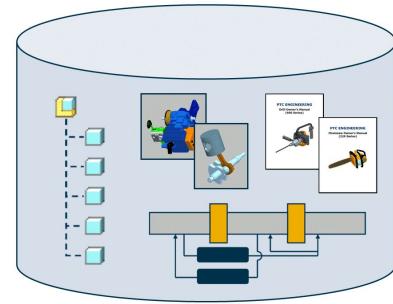
WBT-4201-0

Course Length

2.5 Hours

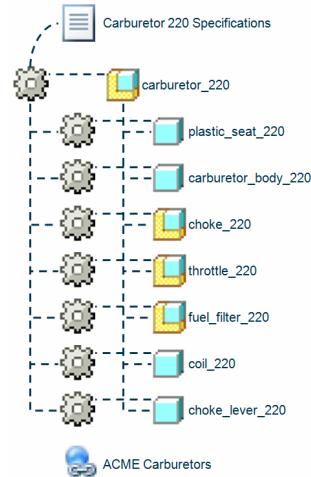
In this course, you will learn basic skills required to access and view information, such as: logging on, accessing help, and locating and viewing product information. This course constitutes a comprehensive review of Windchill PDMLink locate and view functionality. In addition, the content is built to support topic-based course configurations.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



## Course Objectives

- Identify and describe the capabilities of Windchill's primary object types
- Identify Windchill storage locations, iteration and revision controls, process controls, access controls, and collaboration features
- Access Windchill
- Navigate within Windchill
- Access Help
- Execute simple and advanced searches
- Save searches
- Browse contexts
- Use, manage, and create Windchill table views
- View the attributes, content, and relationships of Windchill objects



## **Prerequisites**

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- Basic browser and Web navigation skills
- Basic understanding of product development processes and deliverables

## **Audience**

---

- This course is intended for any user who needs to access product information residing within the Windchill PDMLink system. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Introduction to the Windchill Environment
Module	2	Locating Information
Module	3	Viewing Information

# Visualization with Creo View MCAD Lite 3.0 for Windchill PDMLink 10.2

## Overview

Course Code

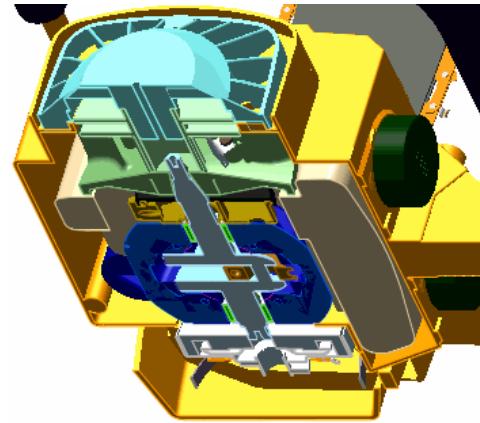
WBT-4202-0

Course Length

3.5 Hours

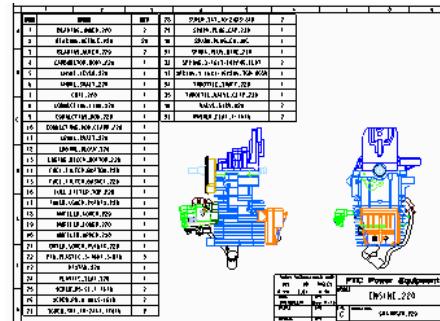
In this course, you will complete a comprehensive review of the Creo View Lite 3.0 functionality. In addition, the content is built to support topic-based course configurations. You will learn about Creo View Lite and its role as a visualization solution for Product Data Management systems. You will also learn how to visualize products and navigate through or query 3-D models, 2-D drawings, images, and documents. Additionally, you will learn how to deconstruct models to view how components fit together. Finally, you will learn how to create markups and save annotation sets to communicate design ideas and problems.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



## Course Objectives

- Introduction to visualization
- Introduction to the Creo View Lite user interface
- Navigating and orienting 3-D models
- Finding and selecting model components
- Changing model appearances
- Working with model annotations
- Exploding model components
- Sectioning models
- Working with components and groups
- Viewing 2-D drawings, images, and documents
- Creating markups and annotation sets
- Taking measurements



## **Prerequisites**

---

- Locate and View Information with Windchill PDMLink 10.2

## **Audience**

---

- This course is intended for any user who needs to view and manipulate product information in Windchill PDMLink. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Introduction to Visualization
Module	2	Getting Around in Creo View
Module	3	Viewing and Interrogating Models
Module	4	Deconstructing a Creo View Model
Module	5	Working with Components
Module	6	Viewing Drawings, Images, and Documents
Module	7	Working with Markups and Annotation Sets
Module	8	Working with Construction Geometry

# MCAD Data Management of Creo Parametric Designs with Windchill PDMLink 10.2

## Overview

Course Code WBT-4203-0

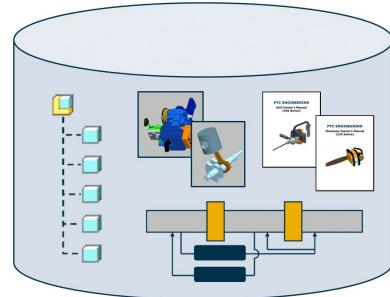
Course Length 4.5 Hours

This course constitutes a comprehensive review of Windchill PDMLink Creo Parametric data management functionality. In addition, the content is built to support topic-based course configurations.

After completing this course, you will be prepared to complete basic Windchill PDMLink CAD data management tasks and activities. You will also have gained a better understanding of Windchill CAD data management processes.

In this course, you will learn key capabilities and features of Windchill PDMLink CAD Data Management and how to use Windchill to manage Creo Parametric design information. Specifically, you will focus on the day-to-day data management tasks required by the Creo Parametric user community, including how to use the CAD data structure to associate and build the product structure. You will also be taught how to use Windchill to perform basic PDM functions on Creo Parametric CAD Documents and their associated Windchill parts.

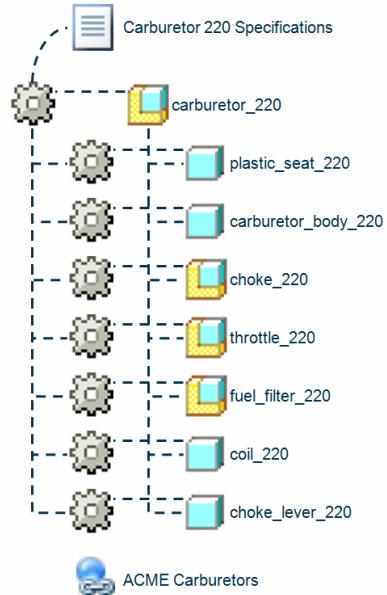
At the end of each module, you will complete a set of review questions to reinforce critical topics from that module. At the end of the course, you will complete a course assessment in Pro/FICIENCY intended to evaluate your understanding of the course as a whole.



## Course Objectives

---

- Locate design information
- View design information
- Create new designs and share design information
- Modify and manage existing design information
- Understand Windchill parts and their association to CAD documents
- Understand file relationships and dependencies
- Manage family tables
- Use workspace frames



## Prerequisites

---

- Locate and View Information with Windchill PDMLink 10.2
- Basic knowledge of Creo Parametric 2.0

## Audience

---

- This course is intended for end users and System Administrators. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Getting Started with Creo Parametric Data Management
Module	2	Initiating New Designs and Sharing Design Data
Module	3	Modifying and Managing Design Data
Module	4	Understanding File Relationships and Dependencies
Module	5	Managing Family Tables
Module	6	Managing CAD Data

# Product Structure Management with Windchill PDMLink 10.2

## Overview

Course Code

WBT-4205-0

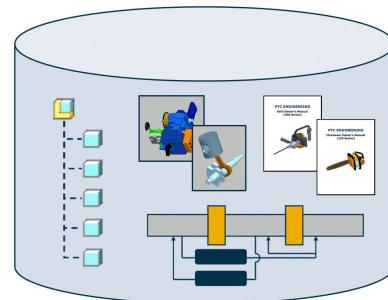
Course Length

3 Hours

This course constitutes a comprehensive review of product structure management functionality. In addition, the content is built to support topic-based course configurations.

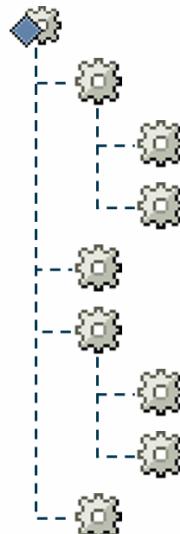
In this course, you will learn some of the concepts and terms that surround products and product structures, as well as how to create product structures using part-centric and CAD-centric approaches. You will explore the Product Structure Explorer interface and learn how to build product structures using Product Structure Explorer. Additionally, you will create baselines and new view versions of product structures, as well as bill of materials (BOM) notes that facilitate manufacturing. Finally, you will be taught about many of the more complex product structure configuration options and how they can be used.

You will complete Pro/FICIENCY skills assessment questions for each module. These questions are used to help reinforce your understanding of the course topics.



## Course Objectives

- Identify the role of parts, end items, and documents in product structures
- Identify various approaches used to create product structures
- Build and edit product structures
- Create product structures using Product Structure Explorer
- Identify various product configurations
- Add bill of materials (BOM) notes to product structures
- Add replacement parts to product structures
- Process part occurrences and add reference designator information
- Set product effectiveness
- Create and manage product configurations and instances



## Prerequisites

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- Locate and View Information with Windchill PDMLink 10.2

## Audience

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- This course is intended for any user that needs to create or manage Windchill parts or product structures.

## Table of Contents

Module	1	Introduction to Product Structure Management
Module	2	Viewing Product Structures
Module	3	Creating Product Structures
Module	4	Managing Product Structures
Module	5	Managing Structure Filters
Module	6	Managing Parts in the Product Structure Explorer
Module	7	Managing Configurations and Instances

# Design Variation Management with Windchill PDMLink 10.2

## Overview

Course Code

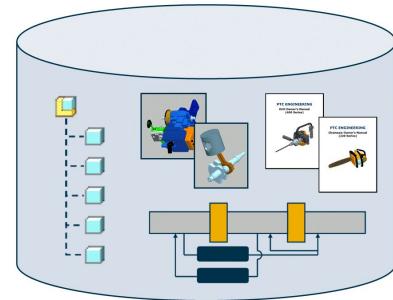
WBT-4206-0

Course Length

3 Hours

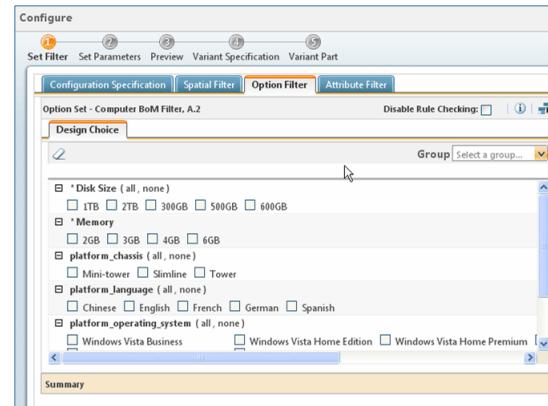
This course constitutes a comprehensive review of options and variants functionality. In addition, the content is built to support topic-based course configurations. You will explore the capabilities, concepts, and processes for creating product options and variants. You will examine the environment and learn how to configure and organize your product structures to support your design variation requirements in Windchill.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



## Course Objectives

- Understand Windchill design variation capabilities
- Create and manage options and choices definitions
- Use option sets to organize product families
- Set up configurable product structures
- Filter a configurable product structure
- Create and manage variants



## Prerequisites

- Completion of one of the following courses:
  - WBT-4261 Introduction to Windchill PDMLink 10.2 for Heavy Users
  - WBT-4262 Introduction to Windchill PDMLink 10.2 for the Implementation Team

## Audience

- This course is intended for users that will be developing the required options and variants, and who already understand Windchill product structures

## Table of Contents

Module	1	Introduction to Windchill Options and Variants
Module	2	Working With Enterprise-wide Definitions
Module	3	Using Option Sets to Establish Product Families
Module	4	Developing Configurable Product Structures
Module	5	Assigning Choices to Parts
Module	6	Configurable Product Structure Filtering
Module	7	Advanced Selection Logic for Configurable Modules
Module	8	Creating and Managing Variants

# Standard Document Management with Windchill PDMLink

## 10.2

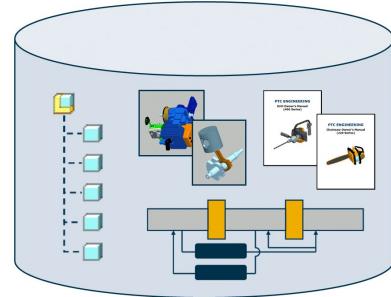
### Overview

Course Code WBT-4207-0

Course Length 1 Hour

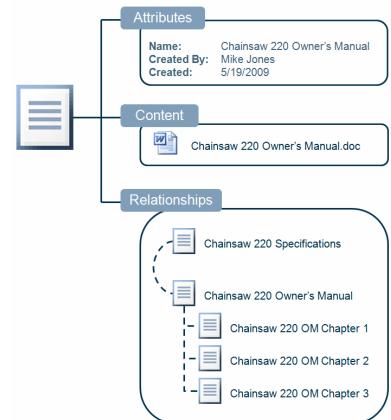
In this course, you will learn the basic skills necessary to perform typical document management tasks using Windchill PDMLink 10.2. You will learn document management skills such as creating and modifying documents. This course constitutes a review of the Standard Document Management functionality. In addition, the content is built to support topic-based course configurations.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



### Course Objectives

- Identify the capabilities of a standard document
- Set document preferences
- Create documents
- Create documents from templates
- Modify documents
- Revise documents
- Create document relationships



## **Prerequisites**

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- Locate and View Information with Windchill PDMLink 10.2

## **Audience**

---

- This course is intended for any user who manages documents within Windchill PDMLink.

## Table of Contents

Module 1 Creating Documents and Links

Module 2 Modifying and Managing Documents

# Arbortext Document Management with Windchill PDMLink

## 10.2

### Overview

Course Code

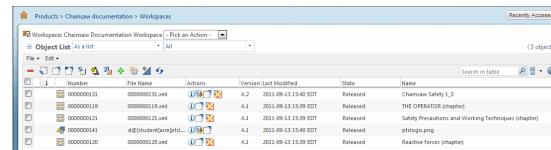
WBT-4209-0

Course Length

1.5 Hours

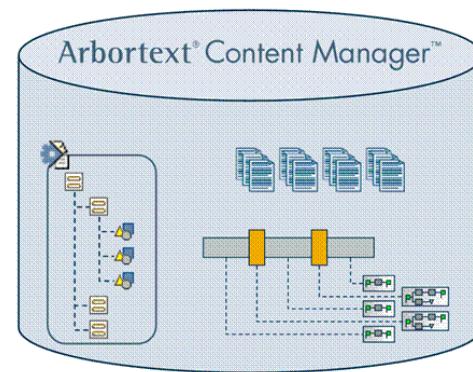
In this course, you will learn the basic skills necessary to use the Arbortext Integration to manage Arbortext Editor documents in the Windchill PDMLink environment. This course covers the basic operations to upload, check in, and check out Arbortext documentation from Windchill PDMLink. These skills are important because they enable a user to apply Windchill PDMLink capabilities toward meeting a company's Content Management goals.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



### Course Objectives

- Log on and connect to Windchill PDMLink
- Understand and use workspaces
- Search and browse for dynamic documents
- Share Arbortext documents
- Use and manage visualization
- Generate and manage published content
- Understand and use burst configuration files
- Create and use managed baselines



### Prerequisites

- Basic browser and Web navigation skills
- Basic understanding of Arbortext Editor functionality
- Basic understanding of Project Management processes and deliverables

### Audience

- This course is intended for end users that generate documentation in Arbortext Editor and need to manage the documentation in a Windchill environment. People in related roles also will benefit from taking this course.

## Table of Contents

Module	1	Getting Started with Arbortext Integration
Module	2	Sharing Arbortext Documents
Module	3	Modifying Arbortext Documents
Module	4	Managing Dynamic Documents

# Change Management with Windchill PDMLink 10.2

## Overview

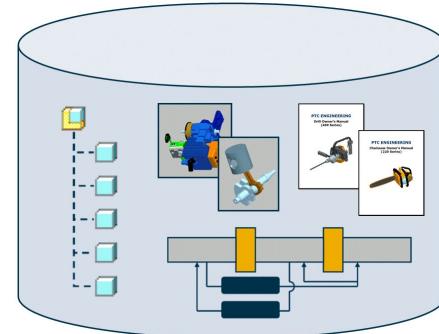
Course Code WBT-4210-0

Course Length 1.5 Hours

This course constitutes a comprehensive review of Windchill PDMLink Change Management functionality. In addition, the content is built to support topic-based course configurations. After completing this course, you will be prepared to complete basic Windchill PDMLink Change Management tasks and activities. You will also have a better understanding of Windchill PDMLink Change Management processes.

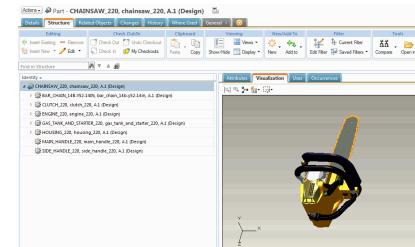
In this course, you will learn about change management capabilities in Windchill PDMLink. You will review the closed-loop change process that is the foundation of Windchill's Change Management discipline and also how to report problems and monitor the progress of changes. Additionally, you will review the entire fast-track change process, taking multiple roles while creating a change request, a change notice, and completing implementation tasks. Finally, you will learn about and create a variance.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



## Course Objectives

- Understand the Change Management process
- Create a problem report
- Create a change request
- Create a change notice and implementation tasks
- Implement changes
- Create a variance
- View the change monitor



## Prerequisites

---

- Locate and View Information with Windchill PDMLink 10.1 or equivalent
- Basic understanding of product development processes and deliverables
- Basic browser and Web navigation skills

## Audience

---

- This course is intended for any user that needs to report problems and interact with product change information in Windchill

## Table of Contents

Module	1	Introduction to the Change Process
Module	2	Creating Change Requests
Module	3	Creating Change Notices
Module	4	Implementing Changes
Module	5	Creating Variances

# Work Management with Windchill PDMLink 10.2

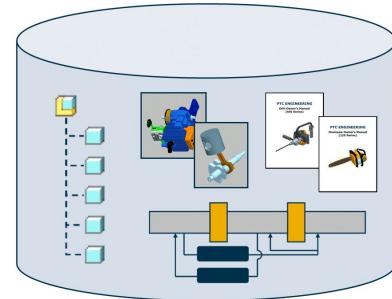
## Overview

Course Code WBT-4211-0

Course Length 2 Hours

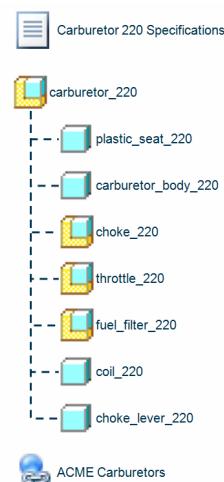
In this course, you will learn how to manage your work. This course constitutes a comprehensive review of common Windchill tasks. In addition, the content is built to support topic-based course configurations. You will explore the Windchill communication and collaboration mechanism including packages. You will also learn how to participate in Windchill processes and how to manage your tasks. Other miscellaneous topics include managing user preferences, and performing common tasks such as Move, Save As, and Rename. After completing the course, you will be prepared to perform common Windchill tasks, as well as have a better understanding of the Windchill system implementation at your company.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



## Course Objectives

- Manage your work environment
- Identify Windchill communication and collaboration tools
- Manage Windchill packages
- Participate in workflow processes
- Manage user preferences
- Perform common Windchill tasks



## Prerequisites

---

- Basic Windchill 10.1 understanding

## Audience

---

- This course is intended for any user who needs to learn about common tasks performed in Windchill.

## Table of Contents

Module	1	Managing Your Work
Module	2	Communication and Collaboration
Module	3	Participating in Processes
Module	4	Performing Common Tasks
Module	5	Managing Windchill Packages

# Update to Windchill PDMLink 10.2 from Windchill PDMLink 10.1 for the End User

## Overview

Course Code

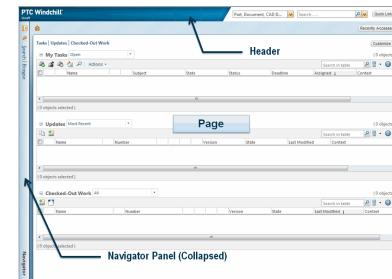
WBT-4251-0

Course Length

1 Hour

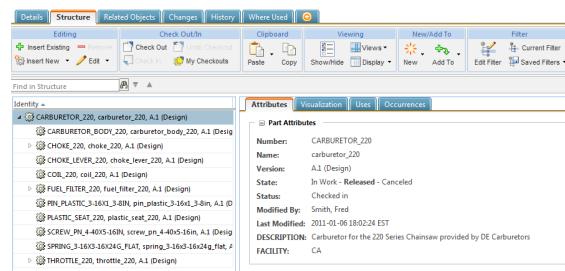
In this course, you will learn to identify the new Windchill features available in Windchill 10.2. This course enables you to update your Windchill knowledge and skills from Windchill PDMLink 10.1 to work in a Windchill PDMLink 10.2 environment.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



## Course Objectives

- Identify the Change Management updates
- Identify the CAD Data Management updates
- Identify the Relationship explorer updates



## Prerequisites

- Working knowledge of Windchill PDMLink 10.1

## Audience

- This course is intended for users who need to update their Windchill knowledge and skills from Windchill PDMLink 10.1 to work in the Windchill PDMLink 10.2 environment.

## Table of Contents

Module 1 Windchill 10.2 Enhancements

# Creo Elements/Direct Data Management with Windchill PDMLink 10.2

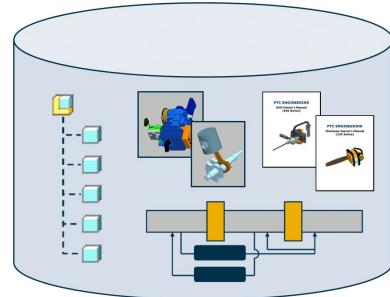
## Overview

Course Code WBT-4301-0

Course Length 3.5 Hours

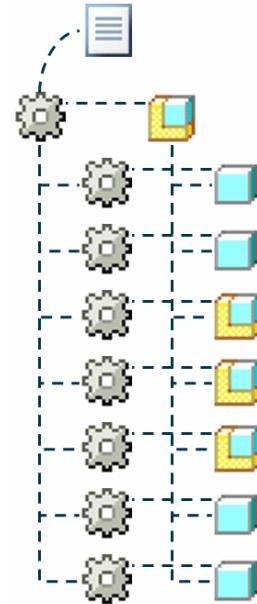
In this course, you will learn key capabilities and features of Windchill PDMLink CAD Data Management and how to use Windchill to manage Creo Elements/Direct Modeling design information. Specifically, you will focus on the day-to-day data management tasks required by the Creo Elements/Direct Modeling user community, including how to use the CAD data structure to associate and build the product structure. You will also learn how to use Windchill to perform basic PDM functions on Creo Elements/Direct Modeling CAD documents and their associated product structure objects. This course constitutes a comprehensive review of Windchill PDMLink Creo Elements/Direct Modeling data management functionality. The content is built to support topic-based course configurations. After completing this course, you will be prepared to perform basic Windchill CAD data management tasks and activities, as well as have a better understanding of Windchill CAD data management processes.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



## Course Objectives

- Locate information
- View information
- Create new designs and share design information
- Modify and manage existing design information
- Understand Windchill parts and their association to CAD documents
- Understand file relationships and dependencies



## Prerequisites

- Locate and View Information with Windchill PDMLink 10.2 or equivalent
- Working knowledge of Creo Elements/Direct Modeling

## Audience

- This course is intended for end users. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Getting Started with CAD Data Management
Module	2	Initiating New Designs and Sharing Design Data
Module	3	Modifying and Managing Design Data

# Update to Windchill PDMLink 10.2 from Windchill PDMLink 10.0 for the Administrator

## Overview

Course Code

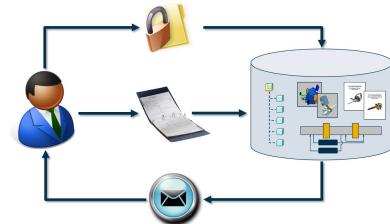
WBT-4321-0

Course Length

3 Hours

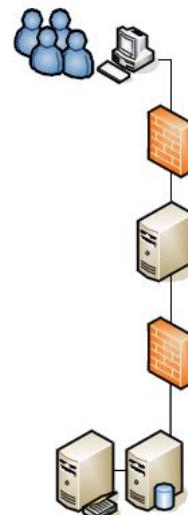
In this course, you will review two main components: business administration enhancements and system administration enhancements. The business administration topics will review miscellaneous business related enhancements. The system administration topics will highlight and cover enhancements related to the file vaulting and replication and system performance. This course is designed for administrators who need to update their Windchill knowledge and skills from Windchill PDMLink 10.0 to work in a Windchill PDMLink 10.2 environment.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



## Course Objectives

- Understand the new Attribute and Type Management interface
- Manage display layouts
- Modify layouts to make information editable
- Use the new charting feature
- Create new users from existing users
- Configure a common home page for users
- Create security labels and agreement enhancements
- Monitor file vaults using new utilities
- Identify the new error reporting features
- Set new Windchill cache sizes using Windchill Configuration Assistant



## Prerequisites

---

- Experience with the Windchill 10.0 business and system administration

## Audience

---

- This course is intended for System Administrators and Application Developers. People in related roles will also benefit from taking this course.

## Table of Contents

Module 1 Business Administration Enhancements

Module 2 System Administration Enhancements

## Update to Windchill PDMLink 10.2 from Windchill PDMLink 10.1 for the Administrator

### Overview

Course Code

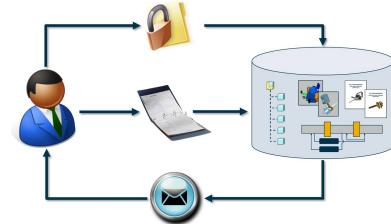
WBT-4322-0

Course Length

1 Hour

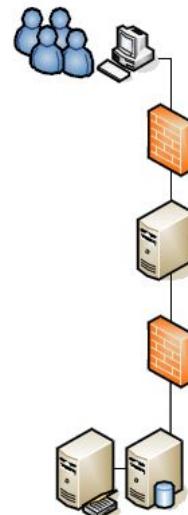
In this course, you will review two main components: business administration enhancements and system administration enhancements. The business administration topics will review miscellaneous business related enhancements. The system administration topics will highlight and cover enhancements related to the file vaulting and replication and system performance. This course is designed for administrators who need to update their Windchill knowledge and skills from Windchill PDMLink 10.1 to work in a Windchill PDMLink 10.2 environment.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



### Course Objectives

- Understand the new Attribute and Type Management interface
- Manage display layouts
- Modify layouts to make information editable
- Create new users from existing users
- Configure a common home page for users
- Create security labels and agreement enhancements
- Monitor file vaults using new utilities
- Set new Windchill cache sizes using Windchill Configuration Assistant



## **Prerequisites**

---

- Experience with the Windchill 10.0 or 10.1 business and system administration

## **Audience**

---

- This course is intended for System Administrators and Application Developers. People in related roles will also benefit from taking this course.

## Table of Contents

Module 1 Business Administration Enhancements

Module 2 System Administration Enhancements

# Creo Parametric Data Administration in Windchill 10.2

## Overview

Course Code

WBT-4335-0

Course Length

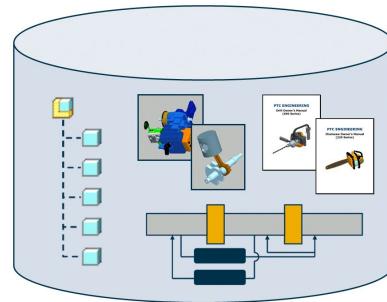
1 Hour

This course constitutes a comprehensive review of configuring Creo Parametric with Windchill. In addition, the content is built to support topic-based course configurations.

After completing this course, you will be prepared to configure Creo Parametric to work in a Windchill environment. You will also have a basic understanding of the Creo Parametric and Windchill architectures.

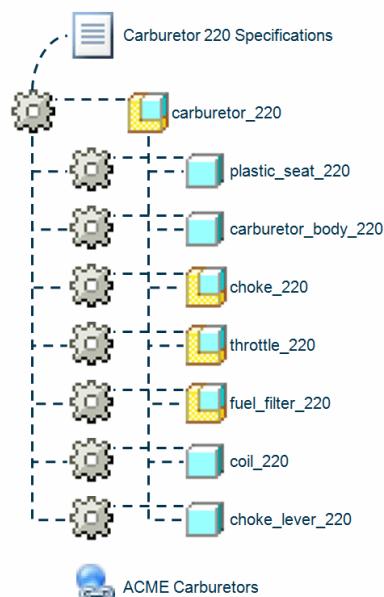
In this course, you will learn key capabilities and features of configuring Creo Parametric to work with Windchill, such as the Windchill architecture that is used to support Creo Parametric. Additionally, you will be taught about Creo Parametric configuration files and options, and the preferences in Windchill that together configure your working environment for the management of your Creo Parametric CAD documents.

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 Windchill workspace architecture
- Use and edit Creo Parametric Startup Files (PSF)
- Use configuration elements to configure Creo Parametric to work with Windchill
- Configure Windchill CAD document management preferences in Windchill
- Map Creo Parametric parameters to Windchill attributes



## **Prerequisites**

---

- Locate and View Information with Windchill 10.2 or equivalent
- Basic understanding of Creo Parametric

## **Audience**

---

- This course is intended for System Administrators and end users.

## Table of Contents

Module 1 Creo Parametric Data Administration

# Arbortext Data Administration in Windchill 10.2

## Overview

Course Code

WBT-4336-0

Course Length

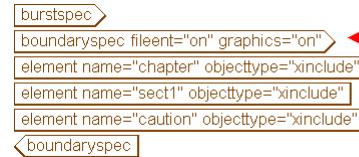
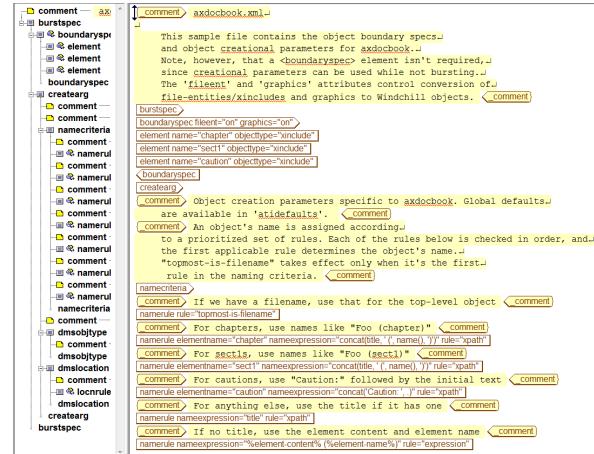
1 Hour

In this course, you will learn how to configure some components of Arbortext Integration to connect Arbortext Editor to Windchill. You will understand the purpose of a process called bursting, and you will learn the system components, architecture, and files used for that process. You will gain knowledge of configuring bursting rules to create and use dynamic document structures within Windchill. Finally, you will learn how to configure Arbortext Publishing Engine for use with Windchill Visualization Services.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.

## Course Objectives

- Define bursting and identify its purpose in Windchill
- Develop a bursting strategy based upon the needs of your organization
- Configure and manage Arbortext Integration to enable the bursting process
- Understand the requirements to achieve a successful bursting configuration
- Create and configure bursting rule configuration files to manage the bursting process
- Configure Arbortext Publishing Engine for use with Windchill Visualization Services



## Prerequisites

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- Introduction to Arbortext Content Manager

## Audience

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- This course is intended for business administrators, system administrators, and project team leaders who need to configure Arbortext Content Manager bursting. Implementation team members, including user adoption team members and those with general Windchill ACM administration responsibilities, will also benefit from taking this course.

## Table of Contents

Module 1 Managing Document Bursting

# Introduction to Windchill PartsLink Classification and Reuse

## 10.2

### Overview

Course Code

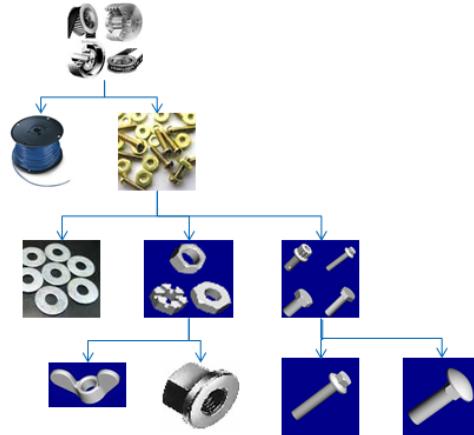
WBT-4265-0

Course Length

2 Hours

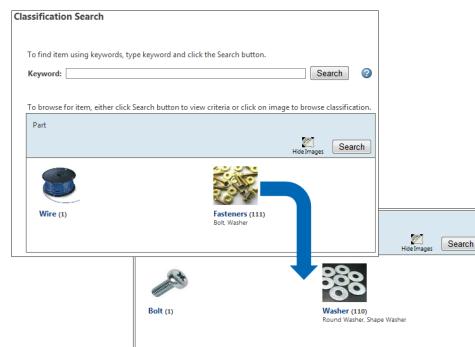
In this course, you will learn to use Windchill PartsLink Classification and Reuse. You will begin by identifying classification search and the business uses it can serve. Then, you will use PartsLink to search for, browse to, create, and classify parts.

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

- Identify the need for parts classification
- Identify the parts of the Windchill user interface that are added with the optional PartsLink module
- Describe classification-based search capabilities
- Browse to classified parts
- Search for classified parts
- Refine search criteria
- Search for similar parts
- Create classified parts
- Classify existing parts



## **Prerequisites**

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- Introduction to Windchill PDMLink 10.2 for Light Users

## **Audience**

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- This course is intended for Windchill users who search for or classify parts. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Introduction to Windchill PartsLink Classification and Reuse
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Module	2	Classifying Parts
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# Administration of Windchill PartsLink Classification and Reuse 10.2

## Overview

Course Code

WBT-4338-0

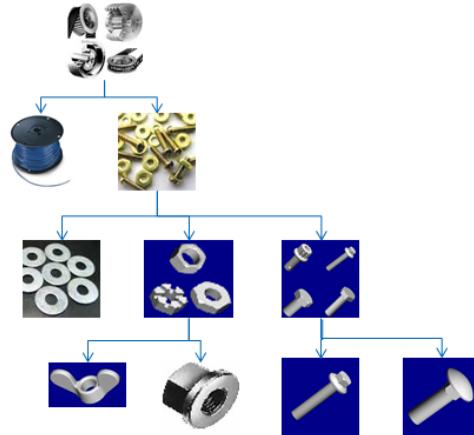
Course Length

8 Hours

In this course, you will learn to use and administer Windchill PartsLink Classification and Reuse. You will begin by identifying classification search and the business uses it can serve. Then, you will use PartsLink to search for, browse to, create, and classify parts.

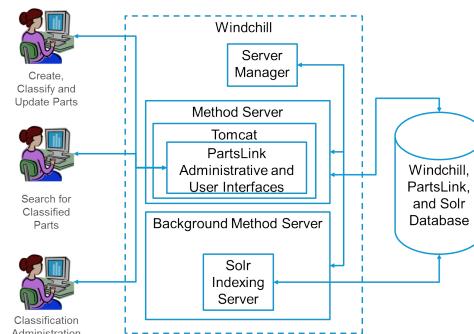
Later in the course, you will configure the Windchill PartsLink environment to set up a classification tree and classification binding attributes. Then, you will administer Windchill PartsLink by editing existing classification structures and creating new classification structures. Finally, you will learn to import a catalog of parts into Windchill using the import from spreadsheet functionality.

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

- Identify the need for parts classification
- Identify the parts of the Windchill user interface that are added with the optional PartsLink module
- Describe classification-based search capabilities
- Browse to classified parts
- Search for classified parts
- Refine search criteria
- Search for similar parts
- Create classified parts
- Classify existing parts
- Describe the Windchill PartsLink architecture
- Identify Windchill PartsLink objects and their purpose
- Identify the relationships between different PartsLink objects
- Identify the tools used to manage the PartsLink classification structure



- Identify best practices for designing a classification structure
- Use the Windchill Manage Classifications page to create and update classification structures
- Import a parts catalog to Windchill using an Excel spreadsheet

## Prerequisites

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- Business Administration of Windchill PDMLink 10.2

## Audience

---

- This course is intended for classification administrators, business administrators, system administrators, and project team leaders. Implementation team members, including user adoption team members, and those with general Windchill PartsLink administration responsibilities will also benefit from taking this course.

## Table of Contents

Module	1	Introduction to Windchill PartsLink Classification and Reuse
Module	2	Classifying Parts
Module	3	Introduction to PartsLink Administration
Module	4	Creating and Maintaining a Windchill PartsLink Classification Structure

# ECAD Data Administration in Windchill PDMLink 10.2

## Overview

Course Code

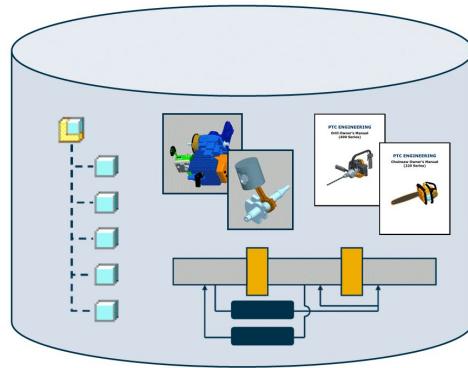
WBT-4337-0

Course Length

1 Hour

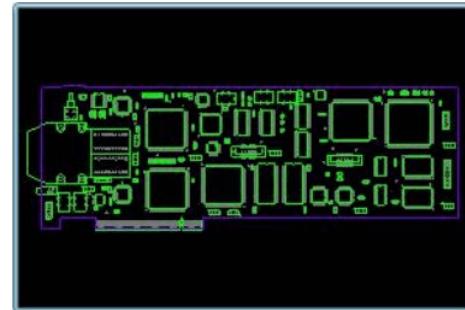
In this course, you will learn how to set up an ECAD environment in Windchill. You will also learn how to install and configure the Windchill Workgroup Manager on client machines. You will understand how to create templates for schematic designs, PCB layouts, and manufacturing data. Finally, you learn how to use the Windchill Workgroup Manager hooks to automate certain processes.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



## Course Objectives

- Identify the ECAD administration process
- Install and configure the Windchill Workgroup Manager
- Create BOM attribute maps
- Create content definitions for derived objects
- Create ECAD templates for schematic designs, PCB layouts, and derived data
- Create and use Windchill Workgroup Manager hooks and hook definitions
- Manage user preferences



## Prerequisites

---

- None

## Audience

---

- This course is intended for Windchill administrators and power users who are setting up the ECAD environment for end users. People in related roles will also benefit from taking this course.

## Table of Contents

Module 1 ECAD Data Administration

# Introduction to Windchill PDMLink 10.2 for ECAD Users

## Overview

Course Code

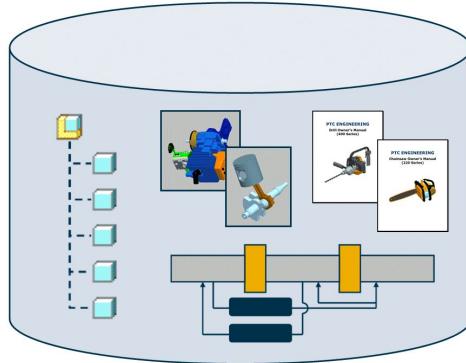
WBT-4263-0

Course Length

8 Hours

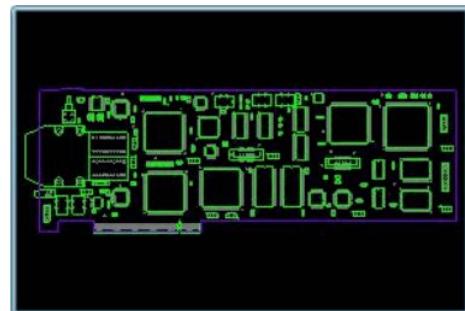
In this course, you will learn how to perform basic Windchill tasks, such as browsing, searching, and viewing information. You will learn how to create and manage ECAD designs, such as the schematic and PCB layouts, using the Windchill Workgroup Manager. You will also gain knowledge with managing standard documents. Finally, you will understand how to perform change management in Windchill.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



## Course Objectives

- Identify Windchill objects and their capabilities
- Use the Windchill user interface
- Search and view ECAD designs in Windchill
- Launch and use Windchill Workgroup Manager
- Create and manage workspaces
- Create new ECAD designs in Windchill from templates
- Check in existing designs into Windchill.
- Modify schematics
- Check in and modify PCB layouts
- Generate design and variant bill of materials from ECAD designs
- Create and manage ECAD derived data, such as IDF, ODB++, and drawings
- Perform common ECAD data management tasks
- Release ECAD design components using a promotion request
- Use Windchill change management
- Create change objects, such as change requests and change notices
- Complete change tasks
- Create and modify standard documents in Windchill



## Prerequisites

---

- None

## Audience

---

- This course is intended for Windchill end users who are viewing, creating, and managing ECAD designs in Windchill. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Introduction to the Windchill Environment
Module	2	Getting Started with ECAD Data Management
Module	3	Managing Schematic Designs
Module	4	Managing PCB Layout Designs
Module	5	Performing Common Data Management Tasks
Module	6	Releasing ECAD Designs
Module	7	Change Management using Windchill
Module	8	Working with Documents using Windchill

# ECAD Data Management with Windchill PDMLink 10.2

## Overview

Course Code

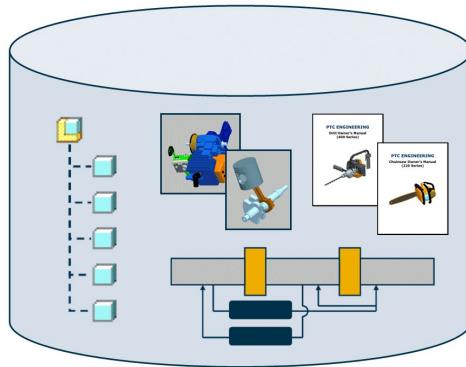
WBT-4204-0

Course Length

4 Hours

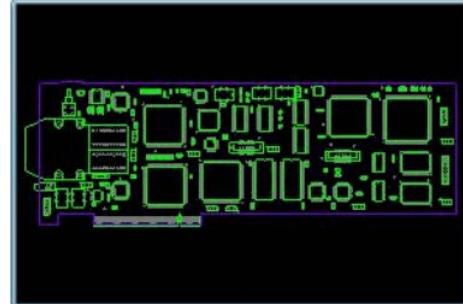
In this course, you will learn how to manage ECAD data, such as the printed circuit board and the schematic in Windchill using the Windchill Workgroup Manager. You will learn how to initiate new ECAD designs in Windchill, modify existing designs, and manage the ECAD design data using the Windchill Workgroup Manager. You will also learn how to extract bill of materials from the ECAD design and build the Windchill product structure.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



## Course Objectives

- Identify ECAD design process and components of ECAD designs
- Manage the Windchill Workgroup Manager user interface
- Manage workspaces
- Create schematics and PCB layouts from templates
- Modify ECAD designs in Windchill
- Manage ECAD derived data
- Generate and manage design and variant bill of materials
- Perform common ECAD data management tasks



## Prerequisites

---

- None

## Audience

---

- This course is intended for Windchill end users who are creating and managing ECAD designs in Windchill. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Getting Started with ECAD Data Management
Module	2	Managing Schematic Designs
Module	3	Managing PCB Layout Designs
Module	4	Performing Common Data Management Tasks

## Desktop Integration with Windchill PDMLink 10.2

## Overview

Course Code	WBT-4208-0
Course Length	1 Hour

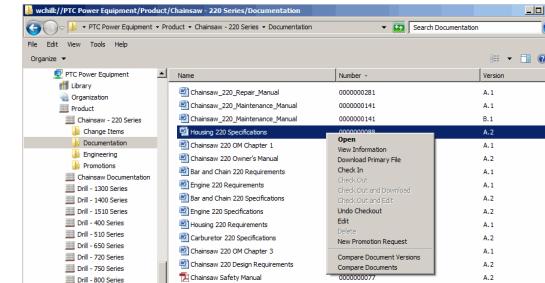


In this course, you will learn the basic skills necessary to use Desktop Integration to manage Microsoft Office documents in the Windchill environment. This course covers the basic operations to search, upload, check in, and check out Windchill documents using Desktop Integration from Microsoft Word, Excel, and PowerPoint. You will also learn how to manage Windchill documents from Windows Explorer.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.

## Course Objectives

- Install and configure Desktop Integration for Microsoft Office 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 (Word, Excel, and PowerPoint)
- Manage Windchill document attributes using Desktop Integration (Word, Excel, and PowerPoint)
- Manage Windchill documents in Microsoft Outlook using Desktop Integration



## **Prerequisites**

---

- None

## **Audience**

---

- This course is intended for end users that generate documentation in Microsoft Office and need to manage the documentation in a Windchill PDMLink environment. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Getting Started with Desktop Integration
Module	2	Managing Windchill Documents in Windows Explorer using Desktop Integration
Module	3	Managing Windchill Documents in Microsoft Office using Desktop Integration
Module	4	Managing Windchill Documents in Microsoft Outlook using Desktop Integration

# AutoCAD Data Management with Windchill PDMLink 10.2

## Overview

Course Code

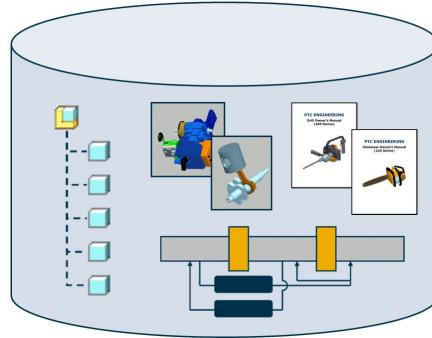
WBT-4305-0

Course Length

3 Hours

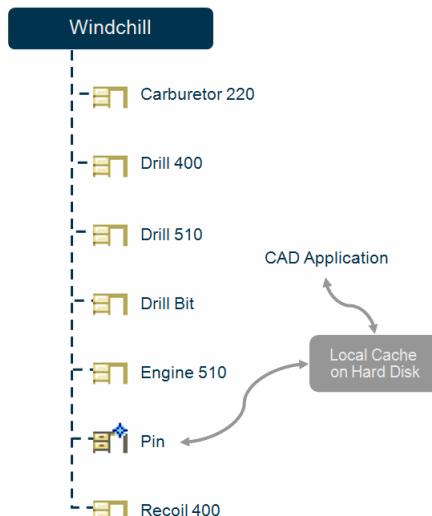
In this course, you will learn key capabilities and features of Windchill PDMLink CAD Data Management and how to use Windchill to manage AutoCAD design information. Specifically, you will focus on the day-to-day data management tasks required by the AutoCAD modeling user community, including how to use the CAD data structure to associate and build the product structure. You will also learn how to use Windchill to perform basic PDM functions on AutoCAD CAD documents and their associated product structure objects. This course constitutes a comprehensive review of Windchill PDMLink AutoCAD data management functionality. After completing this course, you will be prepared to perform basic Windchill CAD data management tasks and activities, as well as have a better understanding of Windchill CAD data management processes.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



## Course Objectives

- Install the Windchill Workgroup Manager
- Register your CAD application with the Workgroup Manager
- Register a Windchill server with your CAD application
- Check in CAD data
- Check out CAD data
- Locate information
- View information
- Create new designs and share design information
- Modify and manage existing design information



- Understand Windchill parts and their association to CAD documents
- Understand the basic Windchill architecture

## Prerequisites

---

- Locate and View Information with Windchill PDMLink 10.2 or equivalent
- Working knowledge of AutoCAD

## Audience

---

- This course is intended for end users. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Getting Started with CAD Data Management
Module	2	Initiating New Designs and Sharing Design Data
Module	3	Modifying and Managing Design Data
Module	4	Managing CAD Data

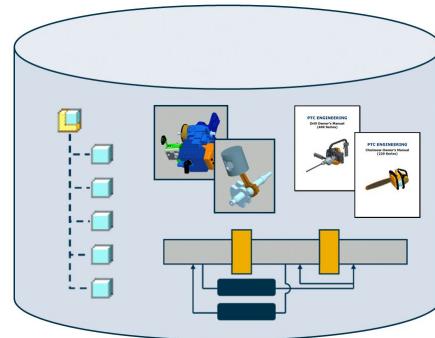
## SolidWorks Data Management with Windchill PDMLink 10.2

## Overview

Course Code	WBT-4304-0
Course Length	3 Hours

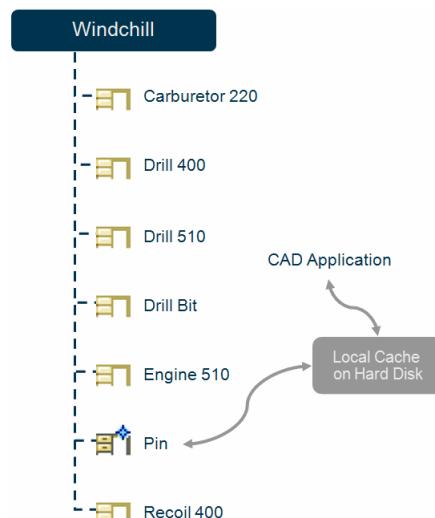
In this course, you will learn key capabilities and features of Windchill PDMLink CAD Data Management and how to use Windchill to manage SolidWorks design information. Specifically, you will focus on the day-to-day data management tasks required by the SolidWorks modeling user community, including how to use the CAD data structure to associate and build the product structure. You will also learn how to use Windchill to perform basic PDM functions on SolidWorks CAD documents and their associated product structure objects. This course constitutes a comprehensive review of Windchill PDMLink SolidWorks data management functionality. After completing this course, you will be prepared to perform basic Windchill CAD data management tasks and activities, as well as have a better understanding of Windchill CAD data management processes.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



## Course Objectives

- Install the Windchill Workgroup Manager
- Register your CAD application with the Workgroup Manager
- Register a Windchill server with your CAD application
- Check in CAD data
- Check out CAD data
- Locate information
- View information
- Create new designs and share design information
- Modify and manage existing design information



- Understand Windchill parts and their association to CAD documents
- Understand the basic Windchill architecture

## Prerequisites

---

- Locate and View Information with Windchill PDMLink 10.2 or equivalent
- Working knowledge of SolidWorks

## Audience

---

- This course is intended for end users. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Getting Started with CAD Data Management
Module	2	Initiating New Designs and Sharing Design Data
Module	3	Modifying and Managing Design Data
Module	4	Managing Family Tables
Module	5	Managing CAD Data

# Autodesk Inventor Data Management with Windchill PDMLink

## 10.2

### Overview

Course Code

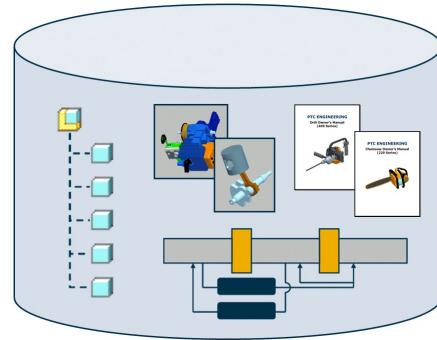
WBT-4306-0

Course Length

3 Hours

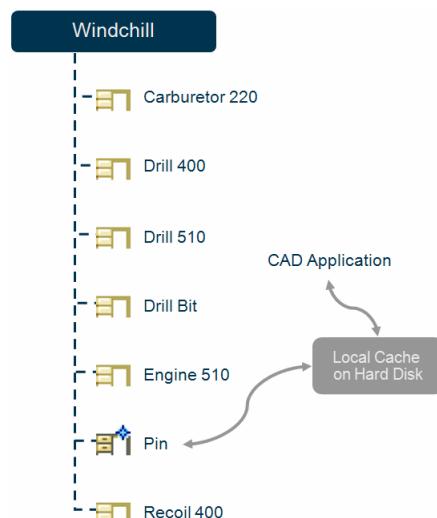
In this course, you will learn key capabilities and features of Windchill PDMLink CAD Data Management and how to use Windchill to manage Autodesk Inventor design information. Specifically, you will focus on the day-to-day data management tasks required by the Inventor modeling user community, including how to use the CAD data structure to associate and build the product structure. You will also learn how to use Windchill to perform basic PDM functions on Autodesk CAD documents and their associated product structure objects. This course constitutes a comprehensive review of Windchill PDMLink Inventor data management functionality. After completing this course, you will be prepared to perform basic Windchill CAD data management tasks and activities, as well as have a better understanding of Windchill CAD data management processes.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



### Course Objectives

- Install the Windchill Workgroup Manager
- Register your CAD application with the Workgroup Manager
- Register a Windchill server with your CAD application
- Check in CAD data
- Check out CAD data
- Locate information
- View information
- Create new designs and share design information
- Modify and manage existing design information



- Understand Windchill parts and their association to CAD documents
- Understand the basic Windchill architecture

## Prerequisites

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- Locate and View Information with Windchill PDMLink 10.2 or equivalent
- Working knowledge of Autodesk Inventor

## Audience

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- This course is intended for end users. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Getting Started with CAD Data Management
Module	2	Initiating New Designs and Sharing Design Data
Module	3	Modifying and Managing Design Data
Module	4	Managing Family Tables
Module	5	Managing CAD Data

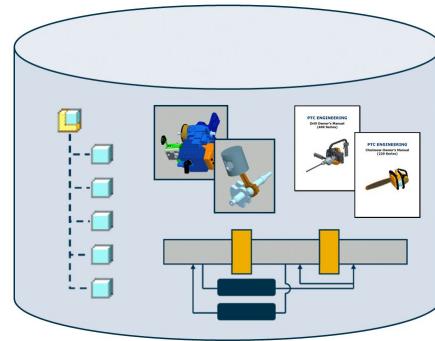
# CATIA Data Management with Windchill PDMLink 10.2

## Overview

Course Code WBT-4302-0

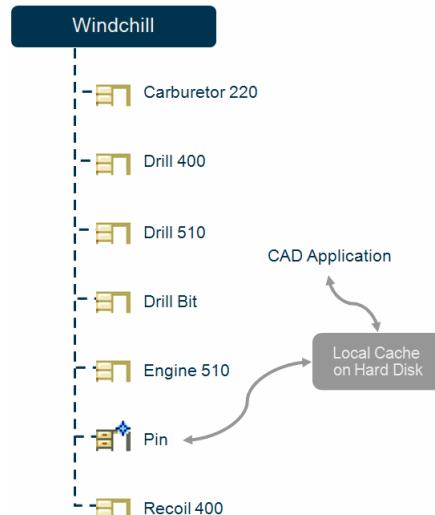
Course Length 3.5 Hours

In this course, you will learn key capabilities and features of Windchill PDMLink CAD Data Management and how to use Windchill to manage CATIA design information. Specifically, you will focus on the day-to-day data management tasks required by the CATIA modeling user community, including how to use the CAD data structure to associate and build the product structure. You will also learn how to use Windchill to perform basic PDM functions on CATIA CAD documents and their associated product structure objects. This course constitutes a comprehensive review of Windchill PDMLink CATIA data management functionality. After completing this course, you will be prepared to perform basic Windchill CAD data management tasks and activities, as well as have a better understanding of Windchill CAD data management processes. You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



## Course Objectives

- Install the Windchill Workgroup Manager
- Register your CAD application with the Workgroup Manager
- Register a Windchill server with your CAD application
- Check in CAD data
- Check out CAD data
- Locate information
- View information
- Create new designs and share design information
- Modify and manage existing design information



- Understand Windchill parts and their association to CAD documents
- Understand the basic Windchill architecture

## Prerequisites

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- Locate and View Information with Windchill PDMLink 10.2 or equivalent
- Working knowledge of CATIA

## Audience

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- This course is intended for end users. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Getting Started with CAD Data Management
Module	2	Initiating New Designs and Sharing Design Data
Module	3	Modifying and Managing Design Data
Module	4	Managing Family Tables
Module	5	Managing CAD Data

# The Windchill PDMLink 10.2 Change Management Process

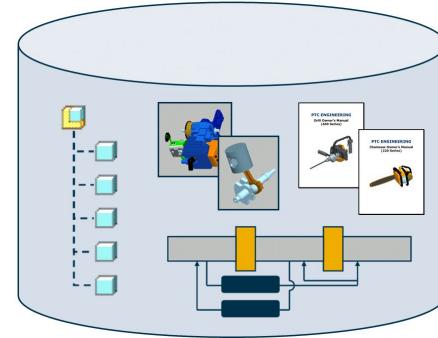
## Overview

Course Code WBT-4230-0

Course Length 1.5 Hours

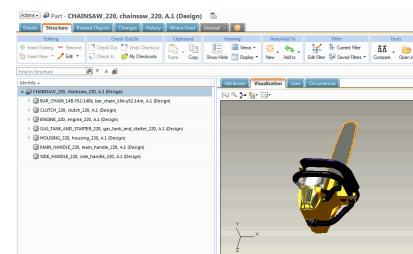
In this Process-based course, you will learn about the Windchill PDMLink change management solution. You will review the closed-loop change process that is the foundation of Windchill's Change Management discipline and also how to report problems and monitor the progress of changes. Additionally, you will review the entire fast-track change process, taking multiple roles while creating a change request, a change notice, and completing implementation tasks.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



## Course Objectives

- Understand the Change Management process
- Create a problem report
- Create a change request
- Create a change notice and implementation tasks
- Implement changes



## Prerequisites

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- Locate and View Information with Windchill PDMLink 10.2 or equivalent
- Basic understanding of product development processes and deliverables
- Basic browser and Web navigation skills

## Audience

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- This course is intended for any user who needs to report problems and interact with product change information in Windchill. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Change Management Process Overview
Module	2	Identify Need
Module	3	Investigate Need
Module	4	Change Planning
Module	5	Change Implementation
Module	6	Review and Audit Change

# NX Data Management with Windchill PDMLink 10.2

## Overview

Course Code

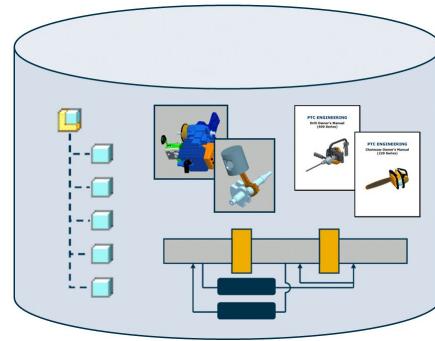
WBT-4303-0

Course Length

3 Hours

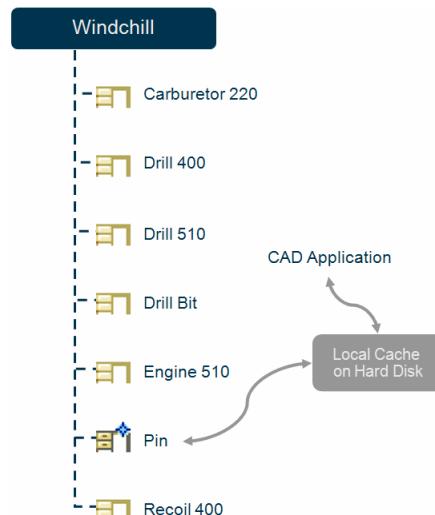
In this course, you will learn key capabilities and features of Windchill PDMLink CAD Data Management and how to use Windchill to manage NX design information. Specifically, you will focus on the day-to-day data management tasks required by the NX modeling user community, including how to use the CAD data structure to associate and build the product structure. You will also learn how to use Windchill to perform basic PDM functions on NX CAD documents and their associated product structure objects. This course constitutes a comprehensive review of Windchill PDMLink NX data management functionality. After completing this course, you will be prepared to perform basic Windchill CAD data management tasks and activities, as well as have a better understanding of Windchill CAD data management processes.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



## Course Objectives

- Install the Windchill Workgroup Manager
- Register your CAD application with the Workgroup Manager
- Register a Windchill server with your CAD application
- Check in CAD data
- Check out CAD data
- Locate information
- View information
- Create new designs and share design information
- Modify and manage existing design information



- Understand Windchill parts and their association to CAD documents
- Understand the basic Windchill architecture

## Prerequisites

---

- Locate and View Information with Windchill PDMLink 10.2 or equivalent
- Working knowledge of NX

## Audience

---

- This course is intended for end users. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Getting Started with CAD Data Management
Module	2	Initiating New Designs and Sharing Design Data
Module	3	Modifying and Managing Design Data
Module	4	Managing Family Tables
Module	5	Managing CAD Data

# Introduction to Windchill MPMLink 10.2

## Overview

Course Code

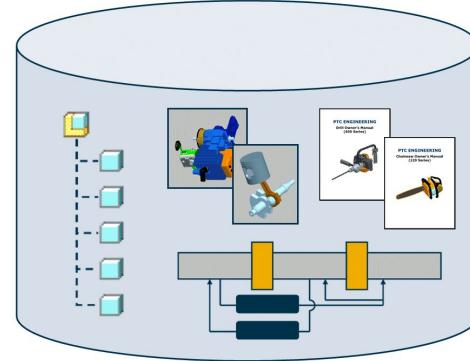
WBT-4264-0

Course Length

16 Hours

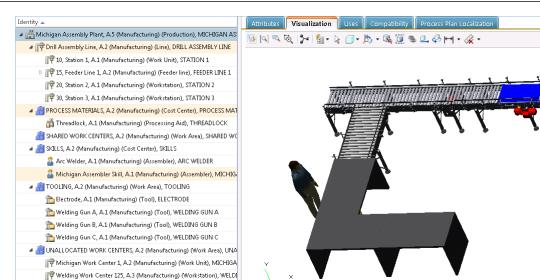
In this course, you will learn how to complete basic Windchill MPMLink functions. You will learn about MPMLink in the context of Manufacturing Process Management (MPM). You will also learn how to access and navigate the MPMLink environment, manage information, use MPMLink's visualization tools, and manage manufacturing changes attributed to product development. Other topics include how to use MPMLink to transform eBOMs to one or more mBOMs, and how to create process plans that consume the mBOM.

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

- Navigate the MPMLink environment
- Examine MPMLink utilities
- Transform an eBOM into an mBOM
- Create a process plan and associate it to the mBOM
- Create operations and allocate parts to them from the mBOM
- Allocate resources to the operations
- Use manufacturing standards in the operations
- Create illustrations and annotations for the operations
- View the production work instructions
- Create a time and cost roll-up
- Release process plans
- Change management overview



## Prerequisites

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- Introduction to Windchill PDMLink 10.2 for Heavy Users

## Audience

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- This course is intended for manufacturing engineers and manufacturing personnel that develop the mBOM or process plans including NC programmers, tooling designers, quality engineers, and production personnel. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Introduction to MPM and Windchill MPMLink
Module	2	Introduction to the Windchill MPMLink Environment
Module	3	MPMLink BOM Translation Tools and Concepts
Module	4	Transforming eBOM to mBOM
Module	5	Introduction to Manufacturing Resources and Manufacturing Standards
Module	6	Creating the Process Plan
Module	7	Allocating Objects to a Process Plan
Module	8	Refining the Process Plan
Module	9	Finalizing the Process Plan
Module	10	MPMLink Change Management

# Windchill PDMLink 10.2 and Windchill ProjectLink 10.2 Interoperability

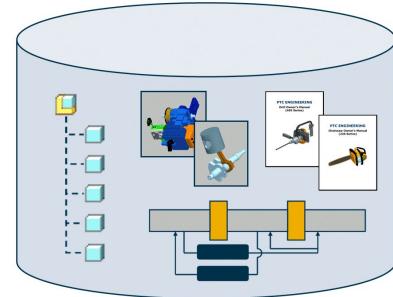
## Overview

Course Code WBT-4308-0

Course Length 1 hour

In this Windchill PDMLink 10.2 and Windchill ProjectLink 10.2 interoperability course, you will explore concepts that will help you understand the advantages of the integrated Windchill PDMLink and Windchill ProjectLink environment. You will explore the environment and learn how to send Windchill PDMLink data to a project, and how to send Windchill ProjectLink data to a Windchill PDMLink context. Also, you will learn how to use context networks to share data and enable searches across application contexts.

At the end of the course, 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

- Understanding the PDMLink and ProjectLink integrated environment
- Navigating within the PDMLink and ProjectLink integrated environment
- Using PDMLink data in projects
- Sharing objects between PDMLink and ProjectLink
- Performing a PDMLink check out from a product to a project
- Using ProjectLink data in PDMLink
- Adding projects to Windchill networks



## **Prerequisites**

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- Working knowledge of Windchill ProjectLink
- Completion of any one of the following courses:
  - Introduction to Windchill PDMLink 10.2 for Light Users
  - Introduction to Windchill PDMLink 10.2 for Heavy Users
  - Introduction to Windchill PDMLink 10.2 for the Implementation Team

## **Audience**

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- The target audience for this course consists of users who will be using an integrated environment and already understand how to use both Windchill PDMLink and Windchill ProjectLink.

## Table of Contents

Module	1	Introduction to the Integrated Environment
Module	2	Using Windchill PDMLink Data in Windchill ProjectLink Projects
Module	3	Using Windchill ProjectLink Data in Windchill PDMLink

# The Windchill PDMLink 10.2 MCAD Data Management Process for Creo Parametric

## Overview

Course Code

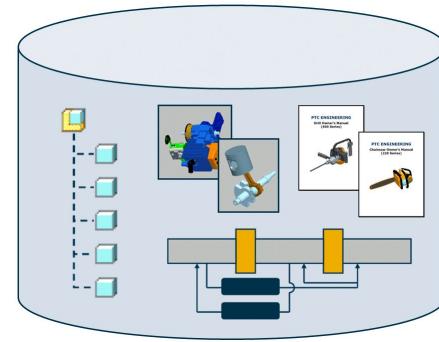
WBT-4231-0

Course Length

3 Hours

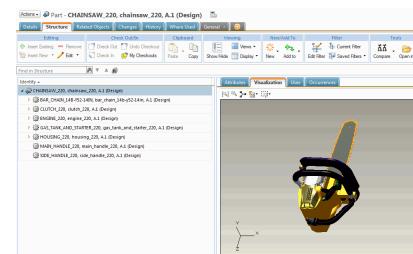
In this Process-based course, you will learn about the Windchill PDMLink Creo Parametric data management solution. You will review how to register the Windchill server with Creo and learn about the Creo Windchill access points. Additionally, you will be taught about the processes of Managing Design Data and Managing Design Development.

You will complete Pro/FICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.



## Course Objectives

- Understand the purpose of CAD documents
- Understand the purpose of Windchill parts
- Register the Windchill server with Creo
- Understand the Manage Design Data process
- Understand the Manage Design Development process



## Prerequisites

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## Audience

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- This course is intended for any user who creates and/or modifies data using Creo Parametric. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Windchill MCAD Data Management Process Overview
Module	2	Manage Design Data
Module	3	Manage Design Development

# Introduction to Windchill Corrective and Preventive Action (CAPA) 10.2

## Overview

Course Code

WBT-4285-0

Course Length

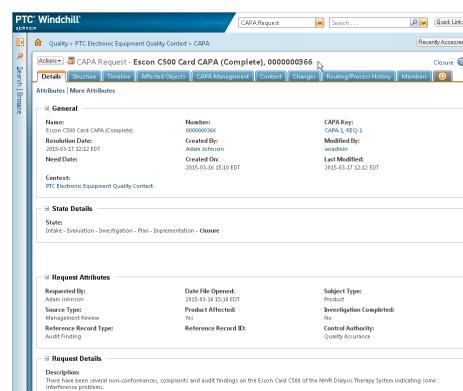
16 Hours

In this process-based course, you will learn about the Windchill CAPA solution for corrective and preventive action. The course begins with introductory materials about Windchill and Windchill CAPA and then focuses on the Windchill CAPA process. You will review the primary process for a CAPA Request by taking on multiple roles to create and review the CAPA Request, perform root cause investigation, construct CAPA plans and complete CAPA plan approval, implement actions for the CAPA Request, and confirm and verify the adequate completion of tasks for the CAPA Request.

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 basics of Windchill and Windchill CAPA
- Locate and view data in Windchill CAPA
- Understand the CAPA process in Windchill CAPA
- Create a new CAPA Request
- Review a CAPA Request
- Perform CAPA root cause investigation
- Create CAPA plans
- Create CAPA Plan Approval Packages
- Complete CAPA Plan Approval
- Implement action plans for CAPA
- Confirm and verify the CAPA
- Understand important CAPA Work Management topics



## Prerequisites

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- None

## Audience

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- This course is intended for any Windchill CAPA user requiring guidance for using Windchill CAPA. People in related roles will also benefit from taking this course.

## Table of Contents

Module	1	Introduction to Windchill CAPA
Module	2	Locating Information
Module	3	Viewing Information
Module	4	CAPA Process Overview
Module	5	Request and Review CAPA
Module	6	Investigate Root Cause of CAPA
Module	7	Plan CAPA
Module	8	Implement CAPA
Module	9	Confirm and Verify CAPA
Module	10	Windchill CAPA Work Management

# Introduction to Windchill Customer Experience Management

## 10.2

### Overview

Course Code

WBT-4286-0

Course Length

16 Hours

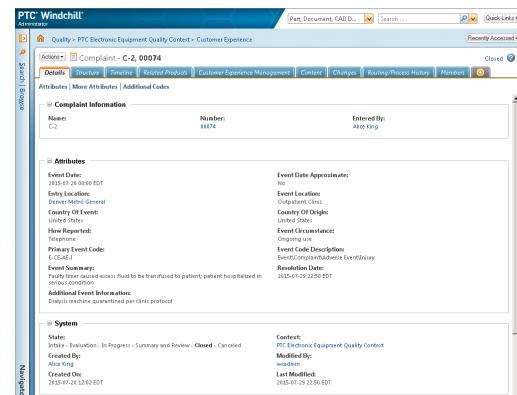
In this process-based course, you will learn about the Windchill Customer Experience Management solution for the uniform capture, codification, and processing of all customer feedback, including complaints. The course begins with introductory materials about Windchill and Windchill Customer Experience Management and then focuses on the Windchill Customer Experience Management process. You will review the primary process for a Customer Experience object by taking on multiple roles to create and evaluate the Customer Experience object, create general and product activities, complete the assigned activities and complete the Customer Experience object summary and review.

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.



### Course Objectives

- Understand the basics of Windchill and Windchill Customer Experience Management.
- Locate and view data in Windchill Customer Experience Management.
- Understand the Customer Experience Management process in Windchill Customer Experience Management.
- Create a new Customer Experience object.
- Evaluate a Customer Experience object.
- Assign general and product activities to a Customer Experience object.
- Complete all general and product activities.
- Complete summary and review details for a Customer Experience object.
- Understand important Customer Experience Management Work Management topics.



## Prerequisites

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- None

## Audience

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- This course is intended for any Windchill Customer Experience Management user requiring guidance for using Windchill Customer Experience Management. People in related roles will also benefit from taking this course.

**Table of Contents**

Module	1	Introduction to Windchill Customer Experience Management
Module	2	Locating Information
Module	3	Viewing Information
Module	4	Customer Experience Management Process Overview
Module	5	Customer Experience Intake
Module	6	Customer Experience Evaluation
Module	7	Customer Experience In Progress (Activity Execution)
Module	8	Customer Experience Summary and Review
Module	9	Windchill Customer Experience Management Work Management