Integrity 10
Curriculum Guide
Live Classroom Curriculum Guide

- Integrity 10 Workflows and Documents Administration Training
- Integrity 10 SCM Administration Training
- Integrity 10 SCM Basic User Training
- Integrity 10 SCM Advanced User Training
- Integrity 10 Requirements Administrator Training
- Integrity 10 Test Management User Training
- Integrity 10 Test Management Administration Training
- Requirements Engineering with Integrity 10.1
- Workflows and Documents with Integrity 10.1
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- SCCM with Integrity 10.4 for Basic Users
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- General Administration of Integrity 10.4
- Requirements Engineering with Integrity 10.4
- Workflows and Documents with Integrity 10.4
- Test Management with Integrity 10.4
Integrity 10 Workflows and Documents Administration Training

Overview

Course Code: TRN-3450-T
Course Length: 2 Days

This course takes an in-depth look at Integrity 10 Workflows and Documents and shows how to create types, define workflow, and administer objects such as users, groups, projects, fields and states.

Integrity documents and the document model are also explained, as well as an introduction to the form designer, reports, charts, dashboards and event triggers.

General Integrity Server configuration, service packs and licensing is also covered providing knowledge on creating an enforceable workflow with full audit trails and security.

Course Objectives

- Licensing – How Integrity Server licensing works.
- Federated Server – The concepts behind the Integrity Federated Server technology.
- Properties Files – Configuring server properties files to suit your needs.
- Unified Administration – Managing the Integrity Server and Workflows and Documents through the Integrity Administration Client.
- Service Packs – The Integrity Server service pack process.
- Security – Security realms and schemes that can be implemented.
- Access Control Lists (ACLs) – Controlling user and group access.
- Workflow – Setting up Workflows and Documents to follow a company process.
- Form Design – Creating custom layouts for viewing, editing and printing Integrity items.
- Event Triggers – Creating customized Workflow and Document actions.
- Reports, Charts and Dashboards – Displaying Integrity item information for users.
- Notifications – Setting up email notifications for users.
- Portfolios – Creating custom fields such as Query Backed Relationships and Item Backed Pick lists
- Time Tracking – Configuring Time Tracking capabilities.
- Documents – Setting up and managing documents in Integrity.

Prerequisites

- None

Audience

This course is for sites that will use Integrity Workflows and Documents. It covers Workflow and Document administration concepts, operations and processes. It is meant for users who will need to perform or know how to perform these tasks:

- Configuring the Integrity Server
• Setting up security and permissions
• Customizing the Integrity installation
Integrity 10 SCM Administration Training

Overview

Course Code  TRN-3452-T
Course Length  1 Day

Building on the basic knowledge of Integrity 10 SCM, this course takes an in-depth look at Integrity 10 SCM administration in order to understand how to configure Integrity Server policies and event triggers that govern the way Integrity Configuration Management behaves. General Integrity Server configuration, service packs and licensing is also covered providing knowledge on enabling and managing source code control with full traceability and security.

Course Objectives

- Licensing – How Integrity Server licensing works.
- Properties Files – Configuring server properties files to suit your needs.
- Unified Administration – Managing the Integrity Server and Configuration Management through the Integrity Administration Client.
- Service Packs – The Integrity Server service pack process.
- Security – Security realms and schemes that can be implemented.
- Access Control Lists (ACLs) – Controlling user and group access to Configuration Management features.
- Policies – Setting Configuration Management user policies (for locking, change packages, etc.)
- Change Package Review Process - Setting up the Configuration Management change package approval process.
- Locking Policy – Choosing a Configuration Management file locking policy type.
- Event Triggers - Creating customized Configuration Management actions.
- Keywords – Creating and enabling custom placeholders.
- Federated Server – The concepts behind the Integrity Federated Server technology.

Prerequisites

- Integrity 10 SCM Basic User Training

Audience

This course is for sites that will use Integrity Configuration Management. It covers Configuration Management administration concepts, operations and processes. It is meant for users who will need to perform or know how to perform these tasks:

- Configuring the Integrity Server
- Setting up security and permissions
- Customizing the Configuration Management installation
Integrity 10 SCM Basic User Training

Overview

Course Code  TRN-3453-T
Course Length  1 Day

This course provides an overview of Integrity Configuration Management 10 such that the Users will understand how to accomplish basic version control and configuration management. Users will learn how to work with projects, sandboxes, members and change packages and branching, revision numbering and parallel development will be introduced.

Course Objectives

- ViewSets – Understanding Integrity ViewSets
- Overview – Basic Configuration Management terms and concepts.
- Sandboxes – Creating a personal workspace.
- Checking Out/Checking In – Editing files using Configuration Management.
- Deferred Actions – Reviewing ways to handle non-immediate actions.
- Locking – Preventing other team members from overwriting changes.
- Delta Symbols – Resolving file differences with the server project.
- Parallel Development – Working with other team members on the same file(s).
- Branching – Development off of the mainline.
- Managing Change Packages – Keeping track of related code changes.
- Locate – Locating Members and Subprojects by name

Prerequisites

- None

Audience

This course is for sites that will use Integrity Configuration Management. It covers basic Configuration Management concepts, operations and processes. It is meant for anyone who will need to perform or know how to perform these tasks:

- Editing code
- Keeping track of code changes
- Developing in a team environment
Integrity 10 SCM Advanced User Training

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This course provides an in-depth look at Integrity Configuration Management 10 such that Users will understand how to accomplish advanced version control and configuration management. Users will learn how to work with development paths, variant and build sandboxes, pending revisions, and subprojects. Checkpointing, labels and advanced change package operations are also covered.

Course Objectives

- Checkpointing & Labels – Preserving a specific project configuration.
- Freezing and Thawing – Controlling project file revisions.
- Updating – Updating project file revisions.
- Development Paths & Variant Sandboxes – Project development off of the mainline.
- Change Packages – Advanced change package operations.
- Managing Change Package Review – Accepting and rejecting code changes.
- Build Sandboxes – Creating read only workspaces.
- Retargeting Sandboxes – Pointing and existing sandbox to a new set of working files
- Sandbox Snapshots – Preserving a specific workspace configuration.
- Shared Sandboxes – Sharing a workspace between multiple users.
- Projects and Subprojects – Creating and configuring software/application projects.

Prerequisites

- Integrity 10 SCM Basic User Training

Audience

This course is for sites that will use Integrity Configuration Management. It is meant for users who will need to perform or know how to perform these tasks:

- Creating software/application projects
- Building or testing code
- Development off of the mainline (experimental or maintenance development)
- Using advanced change package operations
Integrity 10 Requirements Administrator Training

Overview

Course Code TRN-3456-T
Course Length 2 Days

This course provides an in-depth look at the administration tasks involved in configuring and implementing the features provided by Integrity for Requirements Management 10.

This session will build on the core knowledge of Integrity 10 and focus on specific requirements management features so an Administrator may build traceability between requirements, test cases, defects and the related development activities.

Course Objectives

- Installation and configuration of the ALM solution template
- Solution framework and Integrity types
- Properties (solution definitions)
- Project creation and management
- The Integrity document model
- Documents and content
- Change management
- Baselining
- Trace relationships (understanding object dependencies)
- Branching
- Metrics
- Charts, reports and dashboards
- Solution template customization
- Troubleshooting
- Best practices

Prerequisites

- Integrity 10 Workflows and Documents User Training
- Integrity 10 Workflows and Documents Administration Training
- Integrity 10 Requirements User Training

Audience

Integrity Application Administrators
Integrity 10 Test Management User Training

Overview

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This course takes an in-depth look at the capabilities surrounding the concepts of test planning, test authoring, test documents, reuse, change management, versions, traceability, test execution, and defect management provided by Integrity for Test Management.

This session will build on the core knowledge of Integrity 10 Workflows and Documents User and focus on specific test management features which provide traceability through every stage of the software development process and ensure complete test coverage.

Course Objectives

- Project Management
  - Viewing and editing projects
- Test Planning
  - Creating and using test plans and test objectives
- Test Development
  - Authoring test suites and test cases
  - Creating test steps
  - Using test parameters
  - Working with test documents
  - Integrations
- Test Change Management
  - Change Order authorization and notification
  - Suspect relationships
- Test Traceability
  - Creating and viewing traces
  - Impact analysis
- Test Reuse and Branching
  - Functionality supporting reuse of tests
  - Trace propagation

Prerequisites

- Integrity 10 Workflows and Documents User Training is advised but not mandatory

Audience

Test Developers, Test Engineers, Managers
Anyone interacting with the Test Management portion of the ALM template.
Integrity 10 Test Management Administration Training

Overview

Course Code: TRN-3462-T
Course Length: 2 Days

This course provides an in-depth look at the administration tasks involved in configuring and implementing the features provided by Integrity for Test Management 10.

This session will build on the core knowledge of Integrity 10 Workflows and Documents Administration focusing on configuration of specific test management features so an Administrator may build traceability between requirements, test cases, defects and the related development activities.

Course Objectives

- Installation and configuration of the ALM solution template
- Solution framework and Integrity types
- Properties (solution definitions)
- Test parameters
- Test verdicts
- Project creation and management
- The Integrity document model
- Test documents and content
- Change management
- Baselining
- Trace relationships (understanding object dependencies)
- Branching
- Metrics
- Charts, reports and dashboards
- Automated testing
- Solution template customization
- Troubleshooting
- Best practices

Prerequisites

- Integrity 10 Workflows and Documents User Training is advised but not mandatory
- Integrity 10 Workflows and Documents Administration Training
- Integrity 10 Test Management User Training
Audience

Integrity Application Administrators
# Requirements Engineering with Integrity 10.1

## Overview

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In this course, you will be introduced to the capabilities and concepts of documents, reuse, persistence, change management, versions, and baselines required for requirements authoring. After completing this course, you will be able to move beyond the basics of requirements authoring to manage your requirements throughout an application or product lifecycle. Concepts integral to requirements management including traceability, change management, requirements monitoring, and reuse are covered.

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

- Author and manage requirements within Integrity
- Create requirement document baselines and view historical documents
- Import and export requirements between Microsoft Word and Integrity
- Publish Integrity requirements to PTC Windchill
- Manage requirements within an application or product lifecycle
- Conduct impact analysis from a trace view
- Manage change throughout an application or product lifecycle
- Develop valuable metrics to monitor requirements
- Reuse requirements in different product families or variants
Prerequisites

- Workflows and Documents with Integrity 10, or equivalent

Audience

- This course is intended for requirements engineers, requirements analysts, product managers, project managers, directors of engineering, and product management. People in related roles will also benefit from taking this course.
# Agenda

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Course Content

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   i. Understanding Document Domains
   ii. Understanding Requirements Engineering
   iii. Understanding Integrity Requirements Engineering
   iv. Reviewing Requirements Engineering Architecture Components
   v. Understanding Integrity Documents

Knowledge Check Questions

Module 2. Documents and the Document View
   i. Understanding Document Types
   ii. Understanding Document Structure
   iii. Understanding Document Workflow
   iv. Importing ViewSets
   v. Using the Document Finder
   vi. Viewing Documents
   vii. Configuring Columns
   viii. Reviewing ID Columns
   ix. Understanding Document Item Fields
   x. Understanding Document Authorization and Permissions
   xi. Configuring General Document View Options
   xii. Configuring Other Document View Options
   xiii. Reviewing Document and Content Menus
   xiv. Reviewing the Section Column
   xv. Reviewing the Row Header
   xvi. Reviewing Virtual Rows
   xvii. Reviewing Subdocument Indicators

Knowledge Check Questions

Module 3. Requirements Authoring and Monitoring
   i. Creating a Document
   ii. Using Document Column Contexts
   iii. Categorizing Content
   iv. Adding Content
   v. Saving and Reverting in the Document View
   vi. Using Cut, Copy, and Paste
   vii. Modifying Content
   viii. Working with Subdocuments
   ix. Using Document Templates
   x. Baselining Documents
   xi. Viewing Documents and Items Historically
   xii. Creating Comparison Reports
xiii. Understanding Change Requests
xiv. Reviewing an Integrity Project Item
xv. Understanding Preconfigured Reports, Charts, and Dashboards

Knowledge Check Questions

Module 4. Integrations
  i. Editing in Microsoft Word
  ii. Exporting in Word
  iii. Importing in Word
  iv. Re-importing Content
  v. Understanding the Windchill Integration
  vi. Understanding Integrity to Windchill Publish
  vii. Understanding Integrity Document Publish

Knowledge Check Questions

Module 5. Project Initiation
  i. Creating an Integrity Project
  ii. Creating a Project Backing Item

Knowledge Check Questions

Module 6. Advanced Requirements Authoring and Monitoring
  i. Editing Significant Edit Fields
  ii. Comparing History, Significant Edits, and Baselines
  iii. Revisioning Items

Knowledge Check Questions

Module 7. Change Management
  i. Using the Change Request to Authorize Changes
  ii. Understanding the Allow Edits Property
  iii. Understanding Hierarchical Editability

Knowledge Check Questions

Module 8. Traceability
  i. Understanding the Importance of Traceability
  ii. Reviewing Impact Analysis
  iii. Understanding Traces
  iv. Understanding Trace Relationships
  v. Creating a Trace
  vi. Viewing Traces
  vii. Viewing Trace Status
  viii. Identifying Suspect Relationships
  ix. Reviewing Change Notification

Knowledge Check Questions
Module 9. Tracing to Source
   i. Understanding Source Traces
   ii. Using the Source Trace Viewer

Knowledge Check Questions

Module 10. Requirements Publishing and Reuse
   i. Understanding Reuse
   ii. Using Reference Mode
   iii. Using Paste Special Reference Mode Option
   iv. Branching
   v. Using Branch Document and Reference Mode
   vi. Using Trace Propagation
   vii. Using Trace Propagation — Suspect Relationships

Knowledge Check Questions


Workflows and Documents with Integrity 10.1

Overview

Course Code: TRN-4101-T
Course Length: 1 Day

In this course, you will learn about how Integrity 10 Workflows and Documents enable you to use Integrity to perform change management. You will learn the basics of how to work with Integrity items, queries, and workflows to control and streamline the development lifecycle. You will review Integrity reports, charts, dashboards, and E-mail notifications, which can provide real-time data, metrics, and drill-down capabilities.

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

- Provide an overview of basic workflow and document concepts
- Import a ViewSet
- Create and edit process items
- Work with Integrity items in the document view
- Resolve conflict messages when handling items simultaneously edited by multiple users
- Configure queries and column sets
- Filter and view project data based on specific categories
- Find items based on a search phrase
- Create custom buttons to output data to commonly used external applications
- Set up E-mail notifications
- Relate items to one another
- Display workflow and document item information in a report format
- Graphically render workflow and document information in a chart format
Prerequisites

• None

Audience

• This course is intended for Integrity users who submit, edit, and view items as well as those who create reports and charts. People in related roles will also benefit from taking this course.
## Agenda

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Module 1. Navigating Integrity
  i. Navigating the Web Interface
  ii. Navigating the Client GUI Interface
  iii. Setting Client Preferences

Knowledge Check Questions

Module 2. Locate and View
  i. Importing ViewSets
  ii. Activating the Integrity Project Filter
  iii. Configuring Columns
  iv. Using Embedded Item View
  v. Configuring View Options
  vi. Customizing a ViewSet
  vii. Creating Custom Actions
  viii. Setting Up E-mail Notifications

Knowledge Check Questions

Module 3. Change Management
  i. Understanding Lifecycle Management Capabilities
  ii. Understanding Workflow

Knowledge Check Questions

Module 4. Items
  i. Understanding Items and Item Types
  ii. Creating an Item
  iii. Detecting Duplicate Items
  iv. Understanding Fields
  v. Working with Rich Content
  vi. Adding Attachments
  vii. Editing an Item
  viii. Understanding Edit View Options
  ix. Reviewing Tabs
  x. Viewing Item History
  xi. Resolving Item Edit Conflicts
  xii. Understanding Relationships
  xiii. Creating Relationships
  xiv. Configuring Relationship View Settings
  xv. Using Field Filtering
  xvi. Linking an Item to the Source Code Project
  xvii. Using SCM Project Metrics

Knowledge Check Questions
Module 5. Queries
   i. Understanding Queries
   ii. Managing Queries
   iii. Running Queries
   iv. Applying a Query Filter
   v. Modifying a Quick Query
   vi. Using the Query Builder
   vii. Creating a Named Query
   viii. Modifying a Named Query
   ix. Using Text Search
   x. Reviewing Favorites
   xi. Exporting Query Results to Microsoft Excel

Knowledge Check Questions

Module 6. Reports
   i. Understanding Reports
   ii. Managing Reports
   iii. Running Reports
   iv. Creating Reports
   v. Editing Reports

Knowledge Check Questions

Module 7. Charts
   i. Understanding Chart Types
   ii. Managing Charts
   iii. Running Charts
   iv. Creating Charts
   v. Editing Charts

Knowledge Check Questions

Module 8. Dashboards
   i. Understanding Dashboards
   ii. Managing Dashboards
   iii. Running Dashboards
   iv. Creating Dashboards
   v. Editing Dashboards

Knowledge Check Questions
Test Management with Integrity 10.3

Overview

Course Code: TRN-4102-0
Course Length: 1 Day

In this course, you will learn how Test Management for Integrity 10.3 enables you to use Integrity to plan, develop, manage, and monitor your testing activities. You will learn how to create plans, tests, and objectives as well as execute tests, record results, and conduct test coverage analysis. Defect discovery, verification, and resolution will also be covered.

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

- Define Test Management terminology
- Author and manage tests within Integrity
- Create a project to monitor testing progress
- Create a test plan and a series of test objectives
- Update test objectives with test plans
- Create, copy, and replace test steps
- Determine test step editability
- Create and execute test sessions
- Use the test result editor
- Resolve parameters
- Link defects to failed test cases
- Verify defect resolution
Prerequisites

• Workflows and Documents with Integrity 10.1

Audience

• This course is intended for Integrity users who author, manage, or execute tests. People in related roles will also benefit from taking this course.
# Agenda

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Course Content

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   i. Understanding Test Management
   ii. Understanding Integrity Test Management
   iii. Understanding Integrity Test Management Artifacts
   iv. Understanding the Integrity Test Management Process
   v. Understanding Parameters

Knowledge Check Questions

Module 2. Project Initiation
   i. Creating an Integrity Project for Test Management
   ii. Creating a Project Backing Item

Knowledge Check Questions

Module 3. Test Planning
   i. Understanding the Test Planning Process
   ii. Creating a Test Plan
   iii. Defining Test Objectives

Knowledge Check Questions

Module 4. Test Authoring
   i. Understanding Test Development
   ii. Creating a Test Suite
   iii. Creating Test Cases
   iv. Adding Test Steps
   v. Determining Test Step Editability
   vi. Sharing Test Steps
   vii. Updating Test Objectives
   viii. Creating Parameters
   ix. Using Test Groups

Knowledge Check Questions

Module 5. Traceability in Test Management
   i. Understanding the Importance of Traceability
   ii. Reviewing Impact Analysis in Test Management
   iii. Understanding Traces in Test Management
   iv. Understanding Trace Relationships in Test Management
   v. Understanding the Allow Traces Property
   vi. Creating a Trace in Test Management
   vii. Viewing Traces in Test Management
   viii. Viewing Trace Status in Test Management
   ix. Identifying Suspect Relationships in Test Management
   x. Reviewing Change Notification
Knowledge Check Questions

Module 6. Test Monitoring
   i. Conducting Test Coverage Analysis
   ii. Reviewing Test Metrics
   iii. Viewing Test Results

Knowledge Check Questions

Module 7. Test Execution Planning
   i. Understanding Test Execution Planning
   ii. Creating a Test Session
   iii. Adding Tests to a Test Session
   iv. Setting the Tests As Of Date

Knowledge Check Questions

Module 8. Test Execution
   i. Understanding Test Execution
   ii. Setting the Session Type
   iii. Using the Test Result Editor
   iv. Resolving Parameters in the Test Result Editor

Knowledge Check Questions

Module 9. Defect Management
   i. Understanding Defect Management
   ii. Discovering Defects
   iii. Resolving Defects
   iv. Verifying Defects
   v. Monitoring Defects

Knowledge Check Questions

Module 10. Test Management Reuse
   i. Understanding Reuse in Test Management
   ii. Using Reference Mode in Test Management
   iii. Using Paste Special Reference Mode Option
   iv. Branching in Test Management
   v. Using Branch Document and Reference Mode in Test Management
   vi. Using Trace Propagation in Test Management
   vii. Using Trace Propagation — Suspect Relationships

Knowledge Check Questions
SCCM with Integrity 10.4 for Basic Users

Overview

Course Code: TRN-4103-T
Course Length: 1 Day

In this course, you will learn about Integrity Software Change and Configuration Management 10.4. You will understand how to accomplish basic version control and configuration management skills. You will learn how to work with sandboxes, members, and change packages. Branching, parallel, and variant development will also be introduced.

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 Basic Configuration Management terms and concepts
• Creating a personal workspace using Sandboxes
• Check out, edit files and check back in files
• Identify different types of locks
• Identify Delta Symbols
• Resolve file differences
• Work within parallel development environment
• Create branched versions of members
• Keeping track of related code changes by using Change Packages
• Locate Members and Subprojects by name
Prerequisites

• None

Audience

• This course is intended for Integrity users who develop code within a controlled configuration management environment. People in related roles will also benefit from taking this course.
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Course Content

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   i. Understanding Version Control
   ii. Understanding Configuration Management
   iii. Understanding Integrity Software Change and Configuration Management
   iv. Understanding Working Files
   v. Understanding the Integrity Development Cycle
   vi. Understanding Change Packages
   vii. Reviewing the Developer 10 ViewSet

Knowledge Check Questions

Module 2. Working with Software Change and Configuration Management Sandboxes
   i. Understanding Sandboxes
   ii. Creating a Sandbox
   iii. Understanding Members
   iv. Understanding Member Revisions
   v. Viewing Member History
   vi. Understanding Member History Contents
   vii. Identifying Non-Members
   viii. Reviewing Revision Metadata
   ix. Understanding Change Package Member Operations
   x. Integrating Change Packages with Integrity Items
   xi. Revising Members
   xii. Identifying Types of Locks
   xiii. Submitting a Change Package
   xiv. Dropping a Sandbox
   xv. Importing a Sandbox

Knowledge Check Questions

Module 3. Working with Members
   i. Adding Members
   ii. Viewing the Graphical Member History
   iii. Differencing Member Revisions
   iv. Using the Annotated Revision View
   v. Locating Members and Subprojects
   vi. Moving Members
   vii. Renaming Members
   viii. Reverting Members
   ix. Identifying Deltas
   x. Using Refresh (F5)
   xi. Using Resynchronize (F6)

Knowledge Check Questions
Module 4. Working with Change Packages
   i. Searching for Change Packages
   ii. Filtering Change Packages
   iii. Understanding Change Package Entry Categories
   iv. Working with Change Package Reviews
   v. Resynchronizing by Change Package

Knowledge Check Questions

Module 5. Parallel Development
   i. Understanding Member Branching
   ii. Understanding Revision Numbering
   iii. Performing Parallel Development by Merging with Member Revision
   iv. Performing Parallel Development by Branching and Merging

Knowledge Check Questions

Module 6. Variant Development
   i. Diverging Development
   ii. Creating Development Paths
   iii. Understanding Variant Projects
   iv. Creating Variant Sandboxes
   v. Creating a Build Sandbox
   vi. Retargeting a Sandbox

Knowledge Check Questions

Module 7. IDEs
   i. Reviewing SCCM Supported Integrated Development Environments (IDEs)
   ii. Understanding the Eclipse Integration
   iii. Reviewing the Integrity Eclipse Interface
   iv. Creating a Sandbox within Eclipse
   v. Checking In and Out within Eclipse
   vi. Checkpointing within Eclipse

Knowledge Check Questions
SCCM with Integrity 10.4 for Advanced Users

Overview

Course Code: TRN-4104-T
Course Length: 1 Day

In this course, you will take an in depth look at Integrity Software Change and Configuration Management 10.4 such that you will understand how to accomplish advanced version control and configuration management. You will continue to work with development paths and sandboxes with a key focus on projects, subprojects, and advanced change package operations. SCCM Branching Strategies are also covered.

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 Advanced Configuration Management terms and concepts
- Create and Configure Projects and Subprojects
- Perform Checkpoints with Labels
- Identify differences between Project versions
- Resynchronize Change Packages
- Resolve Conflicting Changes
- Manage the Change Package Review process
- Merge Development Path Changes
- Create and enable Shared Subprojects
Prerequisites

• SCCM with Integrity 10.4 for Basic Users

Audience

• This course is intended for Advanced Integrity users who develop code within a controlled configuration management environment. People in related roles will also benefit from taking this course.
# Agenda

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<td>Module</td>
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<td>Software Change and Configuration Management (SCCM) Branching Strategies</td>
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   i. Understanding Deferred Operations
   ii. Deferring Member Operations
   iii. Submitting Deferred Member Operations
   iv. Understanding Pending Change Package Revisions
   v. Following the Change Package Review Process
   vi. Understanding Change Package Review Workflow States
   vii. Understanding Change Package Review Notifications

Knowledge Check Questions

Module 2. Working with Software Change and Configuration Management (SCCM) Projects
   i. Understanding Software Change and Configuration Management Projects
   ii. Understanding Project History
   iii. Understanding Subprojects
   iv. Creating Projects
   v. Checkpointing
   vi. Using Configuration Management Project Metrics
   vii. Viewing Project Differences
   viii. Understanding Software Change and Configuration Management Labels
   ix. Working with Projects and Checkpoints
   x. Using Shared Subprojects
   xi. Configuring Subprojects
   xii. Moving Subprojects
   xiii. Dropping and Adding Configuration Management Projects
   xiv. Understanding Shared Members
   xv. Setting a Revision Rule for Members
   xvi. Configuring a Scoped Sandbox

Knowledge Check Questions

Module 3. Software Change and Configuration Management (SCCM) Branching Strategies
   i. Understanding SCCM Branching Patterns
   ii. Release Based Branching
   iii. Project Based Branching
   iv. Alternate Project Based Branching

Knowledge Check Questions

Module 4. Advanced Change Package Operations
   i. Copying Changes
   ii. Using Resynchronize Change Package
   iii. Using Propagation Change Packages
   iv. Resolving Conflicting Changes
v. Merging Change Package Revisions
vi. Using Resynchronize Change Package with Change Package Review
vii. Understanding Net Changes
viii. Understanding Backfill
ix. Merging a Child Development Path

Knowledge Check Questions

Module 5. Traceability

i. Understanding Source Traces
ii. Using the Source Trace Viewer
iii. Linking an Item to the Source Code Project

Knowledge Check Questions
Overview

Working entirely in the Integrity Administration client for the duration of this course, you will learn the basic and advanced features of Integrity Workflows and Documents administration. You will manage users and groups, define projects, states, fields and triggers, and design a customized workflow process. This course provides all the Administrative building blocks required to automate process workflow.

Course Objectives

- Navigate key areas of the Workflows and Documents section of the Integrity Administration client.
- Configure an efficient process for Integrity administration.
- Create administrative objects that support solution definition and management as well as workflow migration.
- Create Advanced Custom Fields designed to handle complex data and relationships.
- Develop a workflow for your Integrity solution.
Prerequisites
• None

Audience
• This course is intended for Integrity administrators who manage Integrity Workflows and Documents processes.
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Module 1. Workflow Basics
   i. Managing Workflows and Documents
   ii. Reviewing Lifecycle Management Administrative Capabilities
   iii. Reviewing the PTC Integrity Administration Client
   iv. Defining Projects and Subprojects
   v. Working with Types
   vi. Configuring a Process

Knowledge Check Questions

Module 2. The Staging Environment
   i. Setting Up a Staging Server
   ii. Migrating Changes to Production

Knowledge Check Questions

Module 3. Managing Users and Groups
   i. Defining Workflows and Documents Permissions
   ii. Managing Users and Groups
   iii. Setting E-mail Notification Rules

Knowledge Check Questions

Module 4. Defining States
   i. Defining States
   ii. Defining State Capabilities

Knowledge Check Questions

Module 5. Working with Fields
   i. Understanding Fields
   ii. Creating Custom Fields
   iii. Defining Rich Content Fields
   iv. Text Search Indexing
   v. Creating Relationship Fields
   vi. Understanding Relationship Cycle Detection
   vii. Defining Attachment Fields
   viii. Determining Field Relevance and Editability

Knowledge Check Questions

Module 6. Defining Projects
   i. Administrating Integrity Projects and Subprojects
   ii. Creating a Project Backing Item
   iii. Defining Project Visibility
   iv. Creating Dynamic Groups

Knowledge Check Questions
Module 7. Designing a Workflow

i. Reviewing a Workflow Example
ii. Creating and Managing Types
iii. Using the Graphical Workflow Mode
iv. Creating Phase Fields
v. Determining Field Visibility
vi. Overriding Fields and States
vii. Creating Constraints
viii. Allowing Change Packages
ix. Selecting Notification Fields
x. Setting Up Time Tracking
xi. Designing Presentation Templates
xii. Defining Type Attributes
xiii. Defining Other Type Options

Knowledge Check Questions

Module 8. Working with Triggers

i. Reviewing Event Triggers
ii. Creating Schedule Based Triggers
iii. Creating Rule-Based Triggers
iv. Creating Event Based Triggers
v. Setting Up Electronic Signatures

Knowledge Check Questions

Module 9. Managing Administrative Objects

i. Defining Admin Provided Objects
ii. Creating Report Recipes

Knowledge Check Questions

Module 10. Working with Advanced Custom Fields

i. Reviewing Advanced Custom Fields
ii. Creating Range Fields
iii. Linking an Item to the Source Code Project
iv. Creating Item Backed Pick Lists (IBPLs)
v. Creating a Field Value Attribute (FVA)
vi. Creating Query Backed Relationships (QBRs)
vii. Understanding Computed Expressions
viii. Computed Expression Function Classes
ix. Creating Computed Fields

Knowledge Check Questions

Module 11. Process Design

i. Planning out a Process
ii. Configuring a Type
iii. Project – Software Change Request
General Administration of Integrity 10.4

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Working entirely in the Integrity Administration client for the duration of this course, you learn the basics of general Integrity administration, from user management and security administration, to configuring properties and monitoring the overall system health of Integrity. This course advises you on licensing requirements and provides an overview of Federated Server Architecture (FSA) to support distributed work environments.

Course Objectives

- Navigate the seven key administration areas of the Integrity Administration client.
- Perform basic Integrity server operations using the Command Line Interface (CLI).
- Manage the licensing setup for your organization.
- Develop general permission strategies and maintain Access Control Lists (ACL).
- Configure Integrity server properties.
- Monitor Integrity’s system health.

Prerequisites

- None

Audience

- This course is intended for Integrity administrators who manage Integrity licensing, server operations, server monitoring, and configuration properties.
## Agenda

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Course Content

Module 1. Integrity Architecture
   i. Reviewing Integrity Architecture
   ii. Reviewing the Integrity Administration Client
   iii. Reviewing Integrity Client Install Options

Knowledge Check Questions

Module 2. Using the Command Line Interface for Basic Server Operations
   i. Using the Command Line Interface
   ii. Performing Server Administration

Knowledge Check Questions

Module 3. Configuring FlexNet License Manager
   i. Using the FlexNet Licensing Process
   ii. Reviewing the FlexNet License Server Manager
   iii. Setting Up Your Integrity Server License
   iv. Reviewing Applicable Integrity Licenses
   v. Reviewing FlexNet License Types
   vi. Using License Pooling
   vii. Using FlexNet License Reporting

Knowledge Check Questions

Module 4. Security Administration
   i. Reviewing Security Realms
   ii. Working with Users and Groups in the MKS Domain
   iii. Working with Security Schemes
   iv. Encrypting Passwords
   v. Managing Access Control Lists
   vi. Reviewing ACL Entry Principals and Permissions
   vii. Reviewing Built-in ACL Entries
   viii. Managing ACL Entry Scope in Configuration Management

Knowledge Check Questions

Module 5. Developing a General Permission Strategy
   i. Working with Permission Settings
   ii. Reviewing Permission Inheritance
   iii. Resolving Permission Conflicts

Knowledge Check Questions

Module 6. Access Control Lists
   i. Reviewing the mks ACL
   ii. Reviewing the Authorization Administration ACL

Knowledge Check Questions
Module 7. ViewSet Management
i. Setting ViewSet Attributes and Permissions
ii. Configuring a ViewSet
iii. Publishing a ViewSet

Knowledge Check Questions

Module 8. Configuration Properties
i. Reviewing Configuration Properties Files
ii. Editing Configuration Properties in the Integrity Administration Client
iii. Configuring Audit Logging

Knowledge Check Questions

Module 9. System Health Monitoring and Performance Tuning
i. Reviewing PTC System Monitoring
ii. Running Server Diagnostics
iii. Installing Service Packs and HotFixes
iv. Collecting Performance Statistics
v. Improving Query Performance
vi. Collecting Support Packages
vii. Creating Server Alert Messages

Knowledge Check Questions

Module 10. Federated Server Architecture
i. Reviewing Federated Server Architecture
ii. Priming the Cache
iii. Using FSA FlexNet Licensing
iv. Reviewing FSA Security

Knowledge Check Questions
Requirements Engineering with Integrity 10.4

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In this course, you will be introduced to the capabilities and concepts of documents, reuse, persistence, change management, versions, and baselines required for requirements authoring. After completing this course, you will be able to move beyond the basics of requirements authoring to manage your requirements throughout an application or product lifecycle. Concepts integral to requirements management including traceability, change management, requirements monitoring, and reuse are covered.

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

- Author and manage requirements within Integrity
- Create requirement document baselines and view historical documents
- Import and export requirements between Microsoft Word and Integrity
- Publish Integrity requirements to PTC Windchill
- Manage requirements within an application or product lifecycle
- Conduct impact analysis from a trace view
- Manage change throughout an application or product lifecycle
- Develop valuable metrics to monitor requirements
- Reuse requirements in different product families or variants
Prerequisites

• Workflows and Documents with Integrity 10.4 (or 10.1) or equivalent

Audience

• This course is intended for requirements engineers, requirements analysts, product managers, project managers, directors of engineering, and product management. People in related roles will also benefit from taking this course.
## Agenda

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Course Content

Module 1. Introduction to Requirements Management Engineering
   i. Understanding Document Domains
   ii. Understanding Requirements Engineering
   iii. Understanding Integrity Requirements Engineering
   iv. Reviewing Requirements Engineering Architecture Components
   v. Understanding Integrity Documents

Knowledge Check Questions

Module 2. Documents and the Document View
   i. Understanding Document Types
   ii. Understanding Document Structure
   iii. Understanding Document Workflow
   iv. Importing ViewSets
   v. Using the Document Finder
   vi. Viewing Documents
   vii. Configuring Columns
   viii. Reviewing ID Columns
   ix. Understanding Document Item Fields
   x. Understanding Document Authorization and Permissions
   xi. Configuring General Document View Options
   xii. Configuring Other Document View Options
   xiii. Reviewing Document and Content Menus
   xiv. Reviewing the Section Column
   xv. Reviewing the Row Header
   xvi. Reviewing Virtual Rows
   xvii. Reviewing Subdocument Indicators

Knowledge Check Questions

Module 3. Requirements Authoring and Monitoring
   i. Creating a Document
   ii. Using Document Column Contexts
   iii. Categorizing Content
   iv. Adding Content
   v. Saving and Reverting in the Document View
   vi. Using Cut, Copy, and Paste
   vii. Modifying Content
   viii. Working with Subdocuments
   ix. Using Document Templates
   x. Baselining Documents
   xi. Viewing Documents and Items Historically
   xii. Creating Comparison Reports
xiii. Understanding Change Requests
xiv. Reviewing an Integrity Project Item
xv. Understanding Preconfigured Reports, Charts, and Dashboards

Knowledge Check Questions

Module 4. Integrations
i. Editing in Microsoft Word
ii. Exporting in Microsoft Word Format
iii. Importing a Microsoft Word Document into Integrity
iv. Re-importing Content
v. Understanding the Windchill Integration
vi. Understanding Integrity to Windchill Publish
vii. Understanding Integrity Document Publish

Knowledge Check Questions

Module 5. Project Initiation
i. Creating an Integrity Project
ii. Creating a Project Backing Item

Knowledge Check Questions

Module 6. Advanced Requirements Authoring and Monitoring
i. Editing Significant Edit Fields
ii. Comparing History, Significant Edits, and Baselines
iii. Revisioning Items

Knowledge Check Questions

Module 7. Change Management
i. Using the Change Request to Authorize Changes
ii. Understanding the Allow Edits Property
iii. Understanding Hierarchical Editability

Knowledge Check Questions

Module 8. Traceability
i. Understanding the Importance of Traceability
ii. Reviewing Impact Analysis
iii. Understanding Traces
iv. Understanding Trace Relationships
v. Creating a Trace
vi. Viewing Traces
vii. Viewing Trace Status
viii. Identifying Suspect Relationships
ix. Reviewing Change Notification

Knowledge Check Questions

Module 9. Tracing to Source
Module 10. Requirements Publishing and Reuse

i. Understanding Reuse
ii. Using Reference Mode
iii. Using Paste Special Reference Mode Option
iv. Branching
v. Using Branch Document and Reference Mode
vi. Using Trace Propagation
vii. Using Trace Propagation – Suspect Relationships

Knowledge Check Questions
Overview

In this course, you will learn about how Integrity 10.4 Workflows and Documents enable you to use Integrity to perform change management. You will learn the basics of how to work with Integrity items, queries, and workflows to control and streamline the development lifecycle. You will review Integrity reports, charts, dashboards, and E-mail notifications, which can provide real-time data, metrics, and drill-down capabilities.

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

- Provide an overview of basic workflow and document concepts
- Import a ViewSet
- Create and edit process items
- Work with Integrity items in the document view
- Resolve conflict messages when handling items simultaneously edited by multiple users
- Configure queries and column sets
- Filter and view project data based on specific categories
- Find items based on a search phrase
- Create custom buttons to output data to commonly used external applications
- Set up E-mail notifications
- Relate items to one another
- Display workflow and document item information in a report format
- Graphically render workflow and document information in a chart format
Prerequisites

- Click here and type the prerequisites.
- Click here and type the prerequisites.

Audience

- This course is intended for Integrity users who submit, edit, and view items as well as those who create reports and charts. People in related roles will also benefit from taking this course.
# Agenda

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   i. Navigating the Web Interface
   ii. Navigating the Client GUI Interface
   iii. Setting Client Preferences
Knowledge Check Questions

Module 2. Locate and View
   i. Importing ViewSets
   ii. Activating the Integrity Project Filter
   iii. Configuring Columns
   iv. Using Embedded Item View
   v. Configuring View Options
   vi. Customizing a ViewSet
   vii. Creating Custom Actions
   viii. Setting Up E-mail Notifications
Knowledge Check Questions

Module 3. Change Management
   i. Understanding Lifecycle Management Capabilities
   ii. Understanding Workflow
Knowledge Check Questions

Module 4. Items
   i. Understanding Items and Item Types
   ii. Creating an Item
   iii. Detecting Duplicate Items
   iv. Understanding Fields
   v. Working with Rich Content
   vi. Adding Attachments
   vii. Editing an Item
   viii. Understanding Edit View Options
   ix. Reviewing Tabs
   x. Viewing Item History
   xi. Resolving Item Edit Conflicts
   xii. Understanding Relationships
   xiii. Creating Relationships
   xiv. Configuring Relationship View Settings
   xv. Using Field Filtering
   xvi. Linking an Item to the Source Code Project
   xvii. Using SCM Project Metrics
Knowledge Check Questions
Module 5. Queries
i. Understanding Queries
ii. Managing Queries
iii. Running Queries
iv. Applying a Query Filter
v. Modifying a Quick Query
vi. Using the Query Builder
vii. Creating a Named Query
viii. Modifying a Named Query
ix. Using Text Search
x. Reviewing Favorites
xi. Exporting Query Results to Microsoft Excel

Knowledge Check Questions

Module 6. Reports
i. Understanding Reports
ii. Managing Reports
iii. Running Reports
iv. Creating Reports
v. Editing Reports

Knowledge Check Questions

Module 7. Charts
i. Understanding Chart Types
ii. Managing Charts
iii. Running Charts
iv. Creating Charts
v. Editing Charts

Knowledge Check Questions

Module 8. Dashboards
i. Understanding Dashboards
ii. Managing Dashboards
iii. Running Dashboards
iv. Creating Dashboards
v. Editing Dashboards

Knowledge Check Questions
Test Management with Integrity 10.4

Overview

Course Code: TRN-4133-T  
Course Length: 1 Day

In this course, you will learn how Test Management for Integrity 10.4 enables you to use Integrity to plan, develop, manage, and monitor your testing activities. You will learn how to create plans, tests, and objectives as well as execute tests, record results, and conduct test coverage analysis. Defect discovery, verification, and resolution will also be covered.

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

- Define Test Management terminology
- Author and manage tests within Integrity
- Create a project to monitor testing progress
- Create a test plan and a series of test objectives
- Update test objectives with test plans
- Create, copy, and replace test steps
- Determine test step editability
- Create and execute test sessions
- Use the test result editor
- Resolve parameters
- Link defects to failed test cases
- Verify defect resolution
Prerequisites

- Workflows and Documents with Integrity 10.4 (or 10.1) or equivalent

Audience

- This course is intended for Integrity users who author, manage, or execute tests. People in related roles will also benefit from taking this course.
## Agenda

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Module 1. Test Management Basics
   i. Understanding Test Management
   ii. Understanding Integrity Test Management
   iii. Understanding Integrity Test Management Artifacts
   iv. Understanding the Integrity Test Management Process
   v. Understanding Parameters

Knowledge Check Questions

Module 2. Project Initiation
   i. Creating an Integrity Project for Test Management
   ii. Creating a Project Backing Item

Knowledge Check Questions

Module 3. Test Planning
   i. Understanding the Test Planning Process
   ii. Creating a Test Plan
   iii. Defining Test Objectives

Knowledge Check Questions

Module 4. Test Authoring
   i. Understanding Test Development
   ii. Creating a Test Suite
   iii. Creating Test Cases
   iv. Adding Test Steps
   v. Determining Test Step Editability
   vi. Sharing Test Steps
   vii. Updating Test Objectives
   viii. Creating Parameters
   ix. Using Test Groups

Knowledge Check Questions

Module 5. Traceability in Test Management
   i. Understanding the Importance of Traceability
   ii. Reviewing Impact Analysis in Test Management
   iii. Understanding Traces in Test Management
   iv. Understanding Trace Relationships in Test Management
   v. Understanding the Allow Traces Property
   vi. Creating a Trace in Test Management
   vii. Viewing Traces in Test Management
   viii. Viewing Trace Status in Test Management
   ix. Identifying Suspect Relationships in Test Management
   x. Reviewing Change Notification
Knowledge Check Questions

Module 6. Test Monitoring
   i. Conducting Test Coverage Analysis
   ii. Reviewing Test Metrics
   iii. Viewing Test Results

Knowledge Check Questions

Module 7. Test Execution Planning
   i. Understanding Test Execution Planning
   ii. Creating a Test Session
   iii. Adding Tests to a Test Session
   iv. Setting the Tests As Of Date

Knowledge Check Questions

Module 8. Test Execution
   i. Understanding Test Execution
   ii. Setting the Session Type
   iii. Using the Test Result Editor
   iv. Resolving Parameters in the Test Result Editor

Knowledge Check Questions

Module 9. Defect Management
   i. Understanding Defect Management
   ii. Discovering Defects
   iii. Resolving Defects
   iv. Verifying Defect Resolution
   v. Monitoring Defects

Knowledge Check Questions

Module 10. Test Management Reuse
   i. Understanding Reuse in Test Management
   ii. Using Reference Mode in Test Management
   iii. Using Paste Special Reference Mode Option
   iv. Branching in Test Management
   v. Using Branch Document and Reference Mode in Test Management
   vi. Using Trace Propagation in Test Management
   vii. Using Trace Propagation — Suspect Relationships

Knowledge Check Questions
Web Based Curriculum Guide

- Requirements Engineering with Integrity 10.1
- Workflows and Documents with Integrity 10.1
- Change Management with Integrity 10.1
- Integrations with Integrity 10.1
- Items with Integrity 10.1
- Locate and View Information with Integrity 10.1
- Metrics with Integrity 10.1
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- SCCM with Integrity 10.4 for Basic Users
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• Test Management Basics with Integrity 10.4
• Test Planning with Integrity 10.4
• Test Authoring with Integrity 10.4
• Test Execution with Integrity 10.4
• Defect Management with Integrity 10.4
Requirements Engineering with Integrity 10.1

Overview

Course Code: WBT-4100-0
Course Length: 8 Hours

In this course, you will be introduced to the capabilities and concepts of documents, reuse, persistence, change management, versions, and baselines required for requirements authoring. After completing this course, you will be able to move beyond the basics of requirements authoring to manage your requirements throughout an application or product lifecycle. Concepts integral to requirements management including traceability, change management, requirements monitoring, and reuse are covered.

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

- Author and manage requirements within Integrity
- Create requirement document baselines and view historical documents
- Import and export requirements between Microsoft Word and Integrity
- Publish Integrity requirements to PTC Windchill
- Manage requirements within an application or product lifecycle
- Conduct impact analysis from a trace view
- Manage change throughout an application or product lifecycle
- Develop valuable metrics to monitor requirements
- Reuse requirements in different product families or variants
Prerequisites

- Workflows and Documents with Integrity 10, or equivalent

Audience

- This course is intended for requirements engineers, requirements analysts, product managers, project managers, directors of engineering, and product management. People in related roles will also benefit from taking this course.
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Workflows and Documents with Integrity 10.1

Overview

In this course, you will learn about how Integrity 10 Workflows and Documents enable you to use Integrity to perform change management. You will learn the basics of how to work with Integrity items, queries, and workflows to control and streamline the development lifecycle. You will review Integrity reports, charts, dashboards, and E-mail notifications, which can provide real-time data, metrics, and drill-down capabilities. 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

- Provide an overview of basic workflow and document concepts
- Import a ViewSet
- Create and edit process items
- Work with Integrity items in the document view
- Resolve conflict messages when handling items simultaneously edited by multiple users
- Configure queries and column sets
- Filter and view project data based on specific categories
- Find items based on a search phrase
- Create custom buttons to output data to commonly used external applications
- Set up E-mail notifications
- Relate items to one another
- Display workflow and document item information in a report format
- Graphically render workflow and document information in a chart format
Prerequisites

- None

Audience

- This course is intended for Integrity users who submit, edit, and view items as well as those who create reports and charts. People in related roles will also benefit from taking this course.
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Overview

Course Code | WBT-4105-0
Course Length | 0.5 Hour

In this course, you will be introduced to the capabilities and concepts of change management. Workflow, change management, change authorization, and change notification will be covered. 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 workflow
- Understand lifecycle management capabilities
- Understand change requests
- Understand AllowEdits
- Use Change Request Authorization
- Review change notifications
- Identify suspect relationships

Prerequisites

- Items with Integrity 10.1

Audience

- This course is intended for Integrity users who work with change management basics, change permissions, and suspect flags. People in related roles will also benefit from taking this course.
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Integrations with Integrity 10.1

Overview

Course Code: WBT-4106-0  
Course Length: 0.5 Hour

In this course, you will be introduced to the capabilities and concepts of integrations. Microsoft Excel, Microsoft Word, and Windchill integrations will be covered. 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

- Edit in Microsoft Word
- Export in Microsoft Word
- Import in Microsoft Word
- Reimport content
- Understand the Windchill integration
- Understand Integrity to Windchill Publish
- Understand Integrity Document Publish
- Export query results to Microsoft Excel
- Integrate with Microsoft Excel

Prerequisites

- Items with Integrity 10.1
- Requirements Management with Integrity 10.1

Audience

- This course is intended for Integrity users who work with integrating with Microsoft Word, Windchill, and Microsoft Excel. People in related roles will also benefit from taking this course.
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Overview

Course Code  WBT-4107-0
Course Length  2 Hours

In this course, you will be introduced to the capabilities and concepts of Integrity items. Creating and editing items, detecting duplicate items, and using field filtering will be covered. 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 items and item types
• Create an item
• Detect duplicate items
• Understand fields
• Work with rich content
• Add attachments
• Edit an item
• Understand Edit View Options
• Review tabs
• View item history
• Resolve item edit conflicts
• Understand relationships
• Create relationships
• Use field filtering
• Link an item to the source code project
• Use SCM project metrics

Prerequisites

• None

Audience

• This course is intended for Integrity users who work with Integrity items. People in related roles will also benefit from taking this course.
Table of Contents

| Module | 1  | Working with Items |
Locate and View Information with Integrity 10.1

Overview

Course Code: WBT-4108-0
Course Length: 2 Hours

In this course, you will be introduced to the capabilities and concepts of Locate and View. Navigating the Web and GUI interfaces, customizing viewsets, and setting up E-mail notifications will be covered.

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

- Navigate the Web interface
- Navigate the client GUI
- Import viewsets
- Customize a viewset
- Configure columns
- Activate the Integrity Project Filter
- Use Embedded Item View
- Configure View options
- Configure Relationship View Settings
- Set client preferences
- Create custom actions
- Set up E-mail notifications

Prerequisites

- None

Audience

- This course is intended for Integrity users who work with Integrity interfaces, views and viewsets, and user settings. People in related roles will also benefit from taking this course.
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Metrics with Integrity 10.1

Overview

Course Code  WBT-4109-0
Course Length  3 Hours

In this course, you will be introduced to the capabilities and concepts of metrics. Running, creating, and managing queries, reports, charts, and dashboards will be covered. 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 queries
- Manage queries
- Run queries
- Apply a Query Filter
- Modify a Quick Query
- Use the Query Builder
- Create a Named Query
- Modify a Named Query
- Understand reports, charts, and dashboards
- Manage reports, charts, and dashboards
- Run reports, charts, and dashboards
- Create reports, charts, and dashboards
- Edit reports, charts, and dashboards
- Use Text Search
- Review Favorites
- Create comparison reports
- Understand solution preconfigured reports, charts, and dashboards

Prerequisites

- Items with Integrity 10.1

Audience

- This course is intended for Integrity users who work with queries, reports, charts, dashboards, text searches, and favorites. People in related roles will also benefit from taking this course.
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Requirements Management with Integrity 10.1

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In this course, you will be introduced to the capabilities and concepts of requirements management. Integrity requirements engineering and architecture components will be covered.

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 requirements engineering
- Understand Integrity requirements engineering
- Identify requirements engineering architecture components

Prerequisites

- None

Audience

- This course is intended for Integrity users who work with requirements management. People in related roles will also benefit from taking this course.
Table of Contents

| Module | 1 | Requirements Management |


Working with Documents in Integrity 10.1

Overview

Course Code: WBT-4111-0
Course Length: 2 Hours

In this course, you will be introduced to the capabilities and concepts of documents. Finding, creating, viewing, editing, and baselining documents will be covered. 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 document domains, types, structure, and workflow
- Understand Integrity documents
- Use the Document Finder
- View, create, edit, and baseline documents
- Review ID columns
- Understand document item and significant edit fields
- Understanding document authorization and permissions
- Configure general and other document view options
- Review document and content menus
- Review VirtualRow
- Work with subdocuments
- Use document column contexts
- Save and revert in the Document view
- Modify content
- Review an Integrity project item
- Revision items

Prerequisites

- Items with Integrity 10.1

Audience

- This course is intended for Integrity users who work with document theory; accessing documents; document features, view options, components, and functionality; and significant editing. People in related roles will also benefit from taking this course.
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Reuse with Integrity 10.1

Overview

Course Code: WBT-4112-0
Course Length: 0.5 Hour

In this course, you will be introduced to the capabilities and concepts of reuse. Reference mode and system branching will be covered. 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 reuse
- Use Reference mode
- Use Paste Special Reference mode
- Understand branching
- Use Branch Document and Reference mode

Prerequisites

- Items with Integrity 10.1
- Requirements Management with Integrity 10.1

Audience

- This course is intended for Integrity users who work with manual reuse, system reuse, and branching. People in related roles will also benefit from taking this course.
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Overview

In this course, you will be introduced to the capabilities and concepts of traceability. Viewing, creating, and propagating traces as well as source traces will be covered. 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 importance of traceability
- Review impact analysis
- Understand traces
- Understand trace relationships
- Create a trace
- View traces
- View trace status
- Understand source traces
- Use the Source Trace Viewer
- Use Trace Propagation
- Use Trace Propagation - Suspect Relationships

Prerequisites

- Items with Integrity 10.1
- Requirements Management with Integrity 10.1

Audience

- This course is intended for Integrity users who work with traceability basics, source traces, and trace propagation. People in related roles will also benefit from taking this course.
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In this course, you will learn the main components of Integrity Test Management and how they relate to each other and to the overall test management lifecycle. 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 three key objectives of Test Management
- Define the following test terminology and be able to explain where each component fits in the Test Management lifecycle: test plan, test objective, test suite, test case, test step, test result, and defect
- Explain parameter resolution order

Prerequisites

- None

Audience

- This course is intended for users who are interested in learning more about the basics of Integrity Test Management. People in related roles will also benefit from taking this course.
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| Module | 1 | Test Management Basics |
Overview

In this course, you will learn how Test Management for Integrity 10.3 enables you to use Integrity to plan, develop, manage, and monitor your testing activities. You will learn how to create plans, tests, and objectives as well as execute tests, record results, and conduct test coverage analysis. Defect discovery, verification, and resolution will also be covered.

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

- Define Test Management terminology
- Author and manage tests within Integrity
- Create a project to monitor testing progress
- Create a test plan and a series of test objectives
- Update test objectives with test plans
- Create, copy, and replace test steps
- Determine test step editability
- Create and execute test sessions
- Use the test result editor
- Resolve parameters
- Link defects to failed test cases
- Verify defect resolution

Prerequisites

- Workflows and Documents with Integrity 10.1

Audience

- This course is intended for Integrity users who author, manage, or execute tests. People in related roles will also benefit from taking this course.
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Overview

Course Code          WBT-4115-0
Course Length        0.5 Hour

In this course, you will learn how to create a test plan and define test objectives for your plan. Test plans outline the overall test strategy for a project and provide status information on the progress of testing at a project level. 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

• Create a test plan and a series of test objectives

Prerequisites

• Test Management Basics with Integrity 10.3

Audience

• This course is intended for any users who will need to work with test plans and test objectives, including test managers. People in related roles will also benefit from taking this course.
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Test Authoring with Integrity 10.3

Overview

Course Code   WBT-4116-0
Course Length  1 Hour

In this course, you will learn how to use the Test Author ViewSet to develop your test documents and test cases. 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

- Author test suites containing test cases
- Create, copy, and replace test steps
- Create and substitute parameters
- Update test objectives
- Create test groups

Prerequisites

- Test Management Basics with Integrity 10.3

Audience

- This course is intended for test authors and test developers. People in related roles will also benefit from taking this course.
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Test Execution with Integrity 10.3

Overview

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<tr>
<td>Course Length</td>
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In this course, you will be introduced to the capabilities and concepts involved in test execution. Test sessions, results, and verdicts will also be covered. Testers follow documented test steps and enter information using the Test Result Editor.

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

- Set the type of session to be used for testing
- Enter test result verdicts and details
- Move a test session through its workflow

Prerequisites

- Test Management Basics with Integrity 10.3

Audience

- This course is intended for any users who will need to perform test execution, including test engineers. People in related roles will also benefit from taking this course.
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<td>Test Execution</td>
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</table>
Defect Management with Integrity 10.3

Overview

Course Code: WBT-4118-0
Course Length: 0.5 Hour

In this course, you will be introduced to the capabilities and concepts involved in Defect Management within a testing environment. Discovering, resolving, and verifying defects will be covered. You will relate failed test results to existing or newly created defects to provide a tightly integrated relationship between the execution of test cases and defect management.

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

- Create defects on failed test cases from a test session
- Verify defect resolution

Prerequisites

- Test Management Basics with Integrity 10.3

Audience

- This course is intended for any users who will need to perform defect management within a testing environment, including test engineers. People in related roles will also benefit from taking this course.
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SCCM with Integrity 10.4 for Basic Users

Overview

Course Code: WBT-4103-0
Course Length: 8 Hours

In this course, you will learn about Integrity Software Change and Configuration Management 10.4. You will understand how to accomplish basic version control and configuration management skills. You will learn how to work with sandboxes, members, and change packages. Branching, parallel, and variant development will also be introduced.

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 Basic Configuration Management terms and concepts
- Creating a personal workspace using Sandboxes
- Check out, edit files and check back in files
- Identify different types of locks
- Identify Delta Symbols
- Resolve file differences
- Work within parallel development environment
- Create branched versions of members
- Keeping track of related code changes by using Change Packages
- Locate Members and Subprojects by name
Prerequisites

• None

Audience

• This course is intended for Integrity users who develop code within a controlled configuration management environment. People in related roles will also benefit from taking this course.
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</table>
SCCM with Integrity 10.4 for Advanced Users

Overview

Course Code: WBT-4104-0
Course Length: 8 Hours

In this course, you will take an in-depth look at Integrity Software Change and Configuration Management 10.4 such that you will understand how to accomplish advanced version control and configuration management. You will continue to work with development paths and sandboxes with a key focus on projects, subprojects, and advanced change package operations. SCCM Branching Strategies are also covered.

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 Advanced Configuration Management terms and concepts
- Create and Configure Projects and Subprojects
- Perform Checkpoints with Labels
- Identify differences between Project versions
- Resynchronize Change Packages
- Resolve Conflicting Changes
- Manage the Change Package Review process
- Merge Development Path Changes
- Create and enable Shared Subprojects

Prerequisites

- SCCM with Integrity 10.4 for Basic Users

Audience

- This course is intended for Advanced Integrity users who develop code within a controlled configuration management environment. People in related roles will also benefit from taking this course.
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SCCM Configuration Management Overview with Integrity 10.4

Overview

Course Code: WBT-4119-0
Course Length: 3 Hours

In this course, you will be introduced to the capabilities and concepts of Integrity Software Change and Configuration Management (SCCM). Projects, Members, Transactional Change Packages, and the Developer 10 ViewSet will be covered. 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

• Explain how projects, members, and member histories relate to configuration management in Integrity
• List the benefits of transactional change packages and explain how to use them
• Differentiate between working files and members
• Navigate the three main views of the Developer 10 ViewSet

Prerequisites

• None

Audience

• This course is intended for Integrity developers who are involved with software source code development. People in related roles will also benefit from taking this course.
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Overview

Course Code  WBT-4120-0
Course Length  2.5 Hours

In this course, you will be introduced to the capabilities and concepts of Integrity SCCM Members. Member Structure, Using, Updating, and Branching members will be covered. You will complete Pro/FLICIENCY skills assessment questions for each topic. These questions are used to help reinforce your understanding of the course topics.

Course Objectives

- Review Revision Metadata
- Identify Non-members, Member deltas and Member Lock Types
- Add, locate, move and rename Members
- View and interpret the Graphical Member History
- Difference member revisions
- Locate members and subprojects
- Refresh and resynchronize your view
- Understand and Submit a Deferred Member
- Identify pending revisions
- Explain the Change Package Review process

Prerequisites

- None

Audience

- This course is intended for Integrity developers who are involved with software source code development. People in related roles will also benefit from taking this course.
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<td>Module</td>
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<td>Delaying Operations</td>
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SCCM Sandboxes with Integrity 10.4

Overview

Course Code: WBT-4121-0
Course Length: 1 Hour

In this course, you will be introduced to the capabilities and concepts of Integrity SCCM Sandboxes. Creating Normal, Build, and Variant Sandboxes, as well as Configuring a Scoped Sandbox will be covered. 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

- Create a Sandbox
- Drop and import a Sandbox
- Create Development Paths to enable working in a Variant Project
- Create Variant Sandboxes
- Create a Build Sandbox for read only Sandbox configuration
- Retarget a Sandbox
- Configure a Scoped Sandbox

Prerequisites

- None

Audience

- This course is intended for Integrity developers who are involved with software source code development. People in related roles will also benefit from taking this course.
## Table of Contents

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</table>
SCCM Change Packages with Integrity 10.4

Overview

Course Code: WBT-4122-0
Course Length: 1.5 Hours

In this course, you will be introduced to the capabilities and concepts of Integrity SCCM Change Packages. Creating and Working with Change Packages and the Change Package Review Process will be covered. 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

- Create and work with Change Packages integrated with Integrity items
- Explain Change Package Member operations
- Locate Change Packages you need to work with
- Explain Change Package entry categories
- Review Change Packages as a Change Package reviewer
- Resynchronize by Change Packages to bring member revisions to your Sandbox
- Identify pending revisions
- Explain the Change Package Review process
- Understand how to Copy Changes Between Paths of Development
- Move Changes from one Path of Development to another
- Merge Changes from one Path of Development to another
- Handle Conflicting Parallel development Changes

Prerequisites

- None

Audience

- This course is intended for Integrity developers who are involved with software source code development. People in related roles will also benefit from taking this course.
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SCCM Projects with Integrity 10.4

Overview

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<td>Course Length</td>
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In this course, you will be introduced to the capabilities and concepts of Integrity SCCM Projects. Creating Projects, Checkpointing, Branching, and Merging will be covered. 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

- Create and work with Change Packages integrated with Integrity items
- Understand SCCM Project and subproject structure
- Create SCCM Project Checkpoints
- Track SCCM Project Metrics
- Move SCCM subprojects
- Add and Drop SCCM Projects
- Compare Release based branching to Project based branching
- Determine when to use the Alternate Project based branching Strategy
- Perform Parallel Development

Prerequisites

- None

Audience

- This course is intended for Integrity developers who are involved with software source code development. People in related roles will also benefit from taking this course.
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<td>Module</td>
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<td>SCCM Branching Strategies</td>
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</table>
SCCM Integrated Development Environments with Integrity 10.4

Overview

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<th>Course Code</th>
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<td>Course Length</td>
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</table>

In this course, you will be introduced to the capabilities and concepts of Integrity SCCM Integrated Development Environments (IDEs). Creating a Sandbox, Checking in and Out, and Checkpointing within Eclipse will be covered. 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

- Create a Sandbox within Eclipse
- Modify files in Eclipse and submit the associated Change Package
- Checkpoint within Eclipse

Prerequisites

- None

Audience

- This course is intended for Integrity developers who are involved with software source code development. People in related roles will also benefit from taking this course.
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<td>SCCM Eclipse Integration</td>
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</table>
SCCM Traceability with Integrity 10.4

Overview

Course Code: WBT-4125-0
Course Length: 0.8 Hours

In this course, you will be introduced to the capabilities and concepts of Integrity SCCM Traceability. The Source Trace Viewer and Linking an item to a source code project will be covered.

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 information in the Source Trace Viewer
- Link an SCCM project to a Workflows and Documents item
- View trace information from both the Workflows and Documents item and the SCCM project

Prerequisites

- None

Audience

- This course is intended for Integrity developers who are involved with software source code development. People in related roles will also benefit from taking this course.
Table of Contents

| Module | 1 | SCCM Traceability |
Overview

Course Code: WBT-4131-0
Course Length: 8 Hours

In this course, you will be introduced to the capabilities and concepts of documents, reuse, persistence, change management, versions, and baselines required for requirements authoring. After completing this course, you will be able to move beyond the basics of requirements authoring to manage your requirements throughout an application or product lifecycle. Concepts integral to requirements management including traceability, change management, requirements monitoring, and reuse are covered.

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

- Author and manage requirements within Integrity
- Create requirement document baselines and view historical documents
- Import and export requirements between Microsoft Word and Integrity
- Publish Integrity requirements to PTC Windchill
- Manage requirements within an application or product lifecycle
- Conduct impact analysis from a trace view
- Manage change throughout an application or product lifecycle
- Develop valuable metrics to monitor requirements
- Reuse requirements in different product families or variants
Prerequisites

• Workflows and Documents with Integrity 10.4 (or 10.1) or equivalent

Audience

• This course is intended for requirements engineers, requirements analysts, product managers, project managers, directors of engineering, and product management. People in related roles will also benefit from taking this course.
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Overview

In this course, you will learn about how Integrity 10.4 Workflows and Documents enable you to use Integrity to perform change management. You will learn the basics of how to work with Integrity items, queries, and workflows to control and streamline the development lifecycle. You will review Integrity reports, charts, dashboards, and E-mail notifications, which can provide real-time data, metrics, and drill-down capabilities.

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

- Provide an overview of basic workflow and document concepts
- Import a ViewSet
- Create and edit process items
- Work with Integrity items in the document view
- Resolve conflict messages when handling items simultaneously edited by multiple users
- Configure queries and column sets
- Filter and view project data based on specific categories
- Find items based on a search phrase
- Create custom buttons to output data to commonly used external applications
- Set up E-mail notifications
- Relate items to one another
- Display workflow and document item information in a report format
- Graphically render workflow and document information in a chart format
Prerequisites

• Click here and type the prerequisites.
• Click here and type the prerequisites.

Audience

• This course is intended for Integrity users who submit, edit, and view items as well as those who create reports and charts. People in related roles will also benefit from taking this course.
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Overview

Course Code: WBT-4133-0
Course Length: 8 Hours

In this course, you will learn how Test Management for Integrity 10.4 enables you to use Integrity to plan, develop, manage, and monitor your testing activities. You will learn how to create plans, tests, and objectives as well as execute tests, record results, and conduct test coverage analysis. Defect discovery, verification, and resolution will also be covered.

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

- Define Test Management terminology
- Author and manage tests within Integrity
- Create a project to monitor testing progress
- Create a test plan and a series of test objectives
- Update test objectives with test plans
- Create, copy, and replace test steps
- Determine test step editability
- Create and execute test sessions
- Use the test result editor
- Resolve parameters
- Link defects to failed test cases
- Verify defect resolution
**Prerequisites**

- Workflows and Documents with Integrity 10.4 (or 10.1) or equivalent

**Audience**

- This course is intended for Integrity users who author, manage, or execute tests. People in related roles will also benefit from taking this course.
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Overview

Course Code: WBT-4134-0
Course Length: 0.5 Hour

In this course, you will be introduced to the capabilities and concepts of change management. Workflow, change management, change authorization, and change notification will be covered.

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 workflow
- Understand lifecycle management capabilities
- Understand change requests
- Understand AllowEdits
- Use Change Request Authorization
- Review change notifications
- Identify suspect relationships

Prerequisites

- Items with Integrity 10.4 or equivalent

Audience

- This course is intended for Integrity users who work with change management basics, change permissions, and suspect flags. People in related roles will also benefit from taking this course.
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Overview

In this course, you will be introduced to the capabilities and concepts of integrations. Microsoft Excel, Microsoft Word, and Windchill integrations will be covered.
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

- Edit in Microsoft Word
- Export in Microsoft Word
- Import in Microsoft Word
- Reimport content
- Understand the Windchill integration
- Understand Integrity to Windchill Publish
- Understand Integrity Document Publish
- Export query results to Microsoft Excel
- Integrate with Microsoft Excel
Prerequisites

- Items with Integrity 10.4 or equivalent
- Requirements Management with Integrity 10.4 or equivalent

Audience

- This course is intended for Integrity users who work with integrating with Microsoft Word, Windchill, and Microsoft Excel. People in related roles will also benefit from taking this course.
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Overview

In this course, you will be introduced to the capabilities and concepts of Integrity items. Creating and editing items, detecting duplicate items, and using field filtering will be covered. 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 items and item types
- Create an item
- Detect duplicate items
- Understand fields
- Work with rich content
- Add attachments
- Edit an item
- Understand Edit View Options
- Review tabs
- View item history
- Resolve item edit conflicts
- Understand relationships
- Create relationships
- Use field filtering
- Link an item to the source code project
- Use SCM project metrics
Prerequisites

- None

Audience

- This course is intended for Integrity users who work with Integrity items. People in related roles will also benefit from taking this course.
| Module | 1 | Working with Items |
Locate and View Information with Integrity 10.4

Overview

Course Code: WBT-4137-0
Course Length: 2.0 hours

In this course, you will be introduced to the capabilities and concepts of Locate and View. Navigating the Web and GUI interfaces, customizing viewsets, and setting up E-mail notifications will be covered.

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

- Navigate the Web interface
- Navigate the client GUI
- Import viewsets
- Customize a viewset
- Configure columns
- Activate the Integrity Project Filter
- Use Embedded Item View
- Configure View options
- Configure Relationship View Settings
- Set client preferences
- Create custom actions
- Set up E-mail notifications
**Prerequisites**

- None

**Audience**

- This course is intended for Integrity users who work with Integrity interfaces, views and viewsets, and user settings. People in related roles will also benefit from taking this course.
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Metrics with Integrity 10.4

Overview

Course Code: WBT-4138-0
Course Length: 3 Hours

In this course, you will be introduced to the capabilities and concepts of metrics. Running, creating, and managing queries, reports, charts, and dashboards will be covered. 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 queries
- Manage queries
- Run queries
- Apply a Query Filter
- Modify a Quick Query
- Use the Query Builder
- Create a Named Query
- Modify a Named Query
- Understand reports, charts, and dashboards
- Manage reports, charts, and dashboards
- Run reports, charts, and dashboards
- Create reports, charts, and dashboards
- Edit reports, charts, and dashboards
- Use Text Search
- Review Favorites
- Create comparison reports
- Understand preconfigured reports, charts, and dashboards
Prerequisites

- Items with Integrity 10.4 or equivalent

Audience

- This course is intended for Integrity users who work with queries, reports, charts, dashboards, text searches, and favorites. People in related roles will also benefit from taking this course.
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Requirements Management with Integrity 10.4

Overview

In this course, you will be introduced to the capabilities and concepts of requirements management. Integrity requirements engineering and architecture components will be covered.

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 requirements engineering
- Understand Integrity requirements engineering
- Identify requirements engineering architecture components

Prerequisites

- None

Audience

- This course is intended for Integrity users who work with requirements management. People in related roles will also benefit from taking this course.
# Table of Contents

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Working with Documents in Integrity 10.4

Overview

Course Code: WBT-4140-0  
Course Length: 2 Hours  

In this course, you will be introduced to the capabilities and concepts of documents. Finding, creating, viewing, editing, and baselining documents will be covered. 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 document domains, types, structure, and workflow  
• Understand Integrity documents  
• Use the Document Finder  
• View, create, edit, and baseline documents  
• Review ID columns  
• Understand document item and significant edit fields  
• Understanding document authorization and permissions  
• Configure general and other document view options  
• Review document and content menus  
• Review VirtualRow  
• Work with subdocuments  
• Use document column contexts  
• Save and revert in the Document view  
• Modify content  
• Review an Integrity project item  
• Revision items
Prerequisites

- Items with Integrity 10.4 or equivalent

Audience

- This course is intended for Integrity users who work with document theory; accessing documents; document features, view options, components, and functionality; and significant editing. People in related roles will also benefit from taking this course.
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Overview

Course Code          WBT-4141-0
Course Length        0.5 Hour

In this course, you will be introduced to the capabilities and concepts of reuse. Reference mode and system branching will be covered. 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 reuse
- Use Reference mode
- Use Paste Special Reference mode
- Understand branching
- Use Branch Document and Reference mode

Prerequisites

- Items with Integrity 10.4 or equivalent
- Requirements Management with Integrity 10.4 or equivalent

Audience

- This course is intended for Integrity users who work with manual reuse, system reuse, and branching.
  People in related roles will also benefit from taking this course.
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<td>2 System Reuse</td>
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</table>
Overview

In this course, you will be introduced to the capabilities and concepts of traceability. Viewing, creating, and propagating traces as well as source traces will be covered.
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

- Review impact analysis
- Understand traces
- Understand trace relationships
- Create a trace
- View traces
- View trace status
- Understand source traces
- Use the Source Trace Viewer
- Use Trace Propagation
- Use Trace Propagation - Suspect Relationships
Prerequisites

• Click here and type the prerequisites.
• Click here and type the prerequisites.

Audience

• Items with Integrity 10.4 or equivalent
• Requirements Management with Integrity 10.4 or equivalent
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Overview

In this course, you will learn the main components of Integrity Test Management and how they relate to each other and to the overall test management lifecycle. 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 three key objectives of Test Management
• Define the following test terminology and be able to explain where each component fits in the Test Management lifecycle: test plan, test objective, test suite, test case, test step, test result, and defect
• Explain parameter resolution order
Prerequisites

- None

Audience

- This course is intended for users who are interested in learning more about the basics of Integrity Test Management. People in related roles will also benefit from taking this course.
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Overview

Course Code: WBT-4144-0
Course Length: 0.5 Hour

In this course, you will learn how to create a test plan and define test objectives for your plan. Test plans outline the overall test strategy for a project and provide status information on the progress of testing at a project level. 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

• Create a test plan and a series of test objectives
Prerequisites

- Test Management Basics with Integrity 10.3 or equivalent

Audience

- This course is intended for any users who will need to work with test plans and test objectives, including test managers. People in related roles will also benefit from taking this course.
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Overview

In this course, you will learn how to use the Test Author ViewSet to develop your test documents and test cases. 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

- Author test suites containing test cases
- Create, copy, and replace test steps
- Create and substitute parameters
- Update test objectives
- Create test groups
Prerequisites

• Test Management Basics with Integrity 10.4 or equivalent

Audience

• This course is intended for test authors and test developers. People in related roles will also benefit from taking this course.
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Overview

In this course, you will be introduced to the capabilities and concepts involved in test execution. Test sessions, results, and verdicts will also be covered. Testers follow documented test steps and enter information using the Test Result Editor.

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

- Set the type of session to be used for testing
- Enter test result verdicts and details
- Move a test session through its workflow
Prerequisites

- Test Management Basics with Integrity 10.4 or equivalent

Audience

- This course is intended for any users who will need to perform test execution, including test engineers. People in related roles will also benefit from taking this course.
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Defect Management with Integrity 10.4

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In this course, you will be introduced to the capabilities and concepts involved in Defect Management within a testing environment. Discovering, resolving, and verifying defects will be covered. You will relate failed test results to existing or newly created defects to provide a tightly integrated relationship between the execution of test cases and defect management.

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

- Create defects on failed test cases from a test session
- Verify defect resolution
Prerequisites

• Test Management Basics with Integrity 10.4 or equivalent

Audience

• This course is intended for any users who will need to perform defect management within a testing environment, including test engineers. People in related roles will also benefit from taking this course.
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