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PTC Product Focus

Pro/INTRALINK

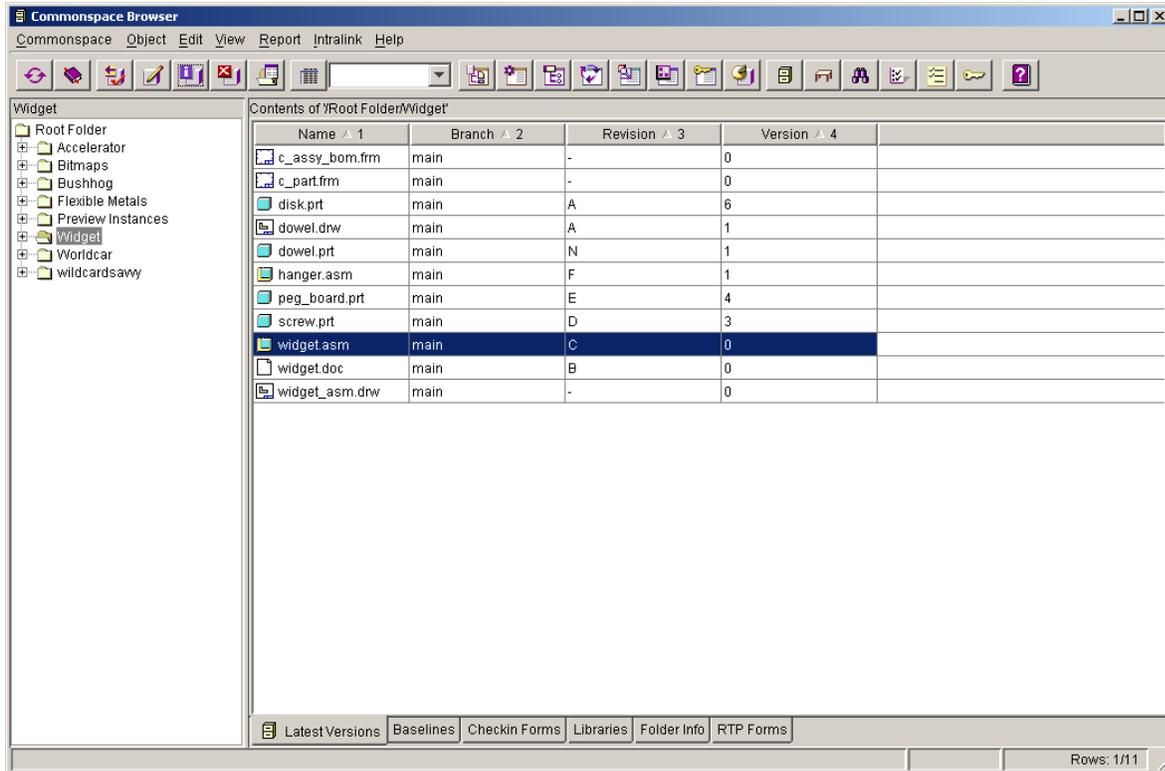
You have probably heard that Pro/INTRALINK is a data management system, which it is. But did you know it is also much more than that? Pro/INTRALINK provides unique and powerful tools to transparently manage a concurrent development process. This is done by providing users with open access and up-to-date product information thereby facilitating the rapid communication of design changes and enabling intelligent design decisions. Pro/INTRALINK also provides complete knowledge and management of all Pro/ENGINEER features and relationships, ensuring information accuracy. Whether you have one site or many sites, Pro/INTRALINK has the tools to manage your product development process. Based on the industry-leading Oracle Database Management System, Pro/INTRALINK guarantees high performance and scalability for your organization.

Some of Pro/INTRALINK's capabilities include:

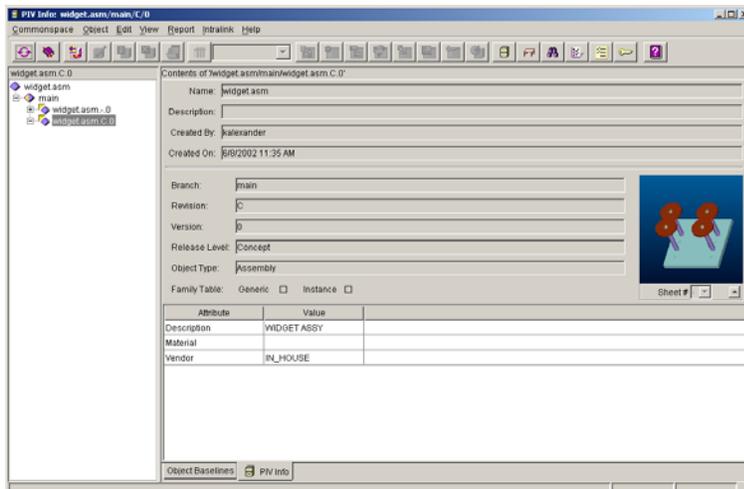
- Pro/INTRALINK's process-focused applications provide users with simple tools that incorporate the necessary management activities associated with product development into the design process.
- Bi-directional sharing of information between Pro/ENGINEER and Pro/INTRALINK ensures that users are working with the latest information, avoiding mistakes commonly associated with out-of-date or incorrect data.
- Bill of Material information is automatically shared between Pro/ENGINEER and Pro/INTRALINK, ensuring that all users have consistently up-to-date product structure knowledge. This information can then be transferred to MRP/ERP systems if necessary.
- Version management ensures that, as a design evolves, all configurations of the design are maintained and available.
- Configuration control assists users in easily accessing the correct versions of the objects required for their design tasks.
- Continual communication of interrelated activities helps identify and avoid potential design conflicts early in the development process, reducing downstream errors and change orders.

- Powerful search and query tools assist users in identifying existing designs for re-use or modification. Reports, such as Object Information, Bill of Material, and Where Used, help identify the impact of planned changes as they relate to other products.

PRO/INTRALINK is broken down into process-focused applications:



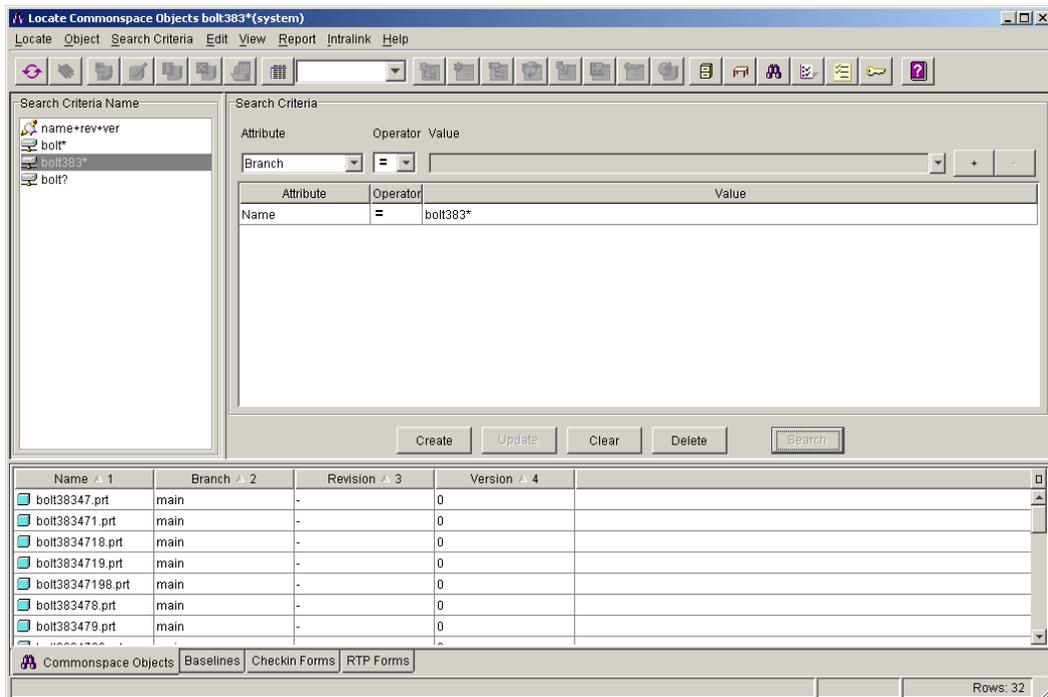
The **COMMONSPACE** is the collection point for organizing and communicating all development activities. It has tools to find, view, and modify information while simultaneously controlling access to that information, monitoring design activities, and managing product life cycles and configurations. Various reporting tools are available here as well. One example is the Object Information report, which provides a 3-dimensional streaming preview as well as providing the complete history of an object:



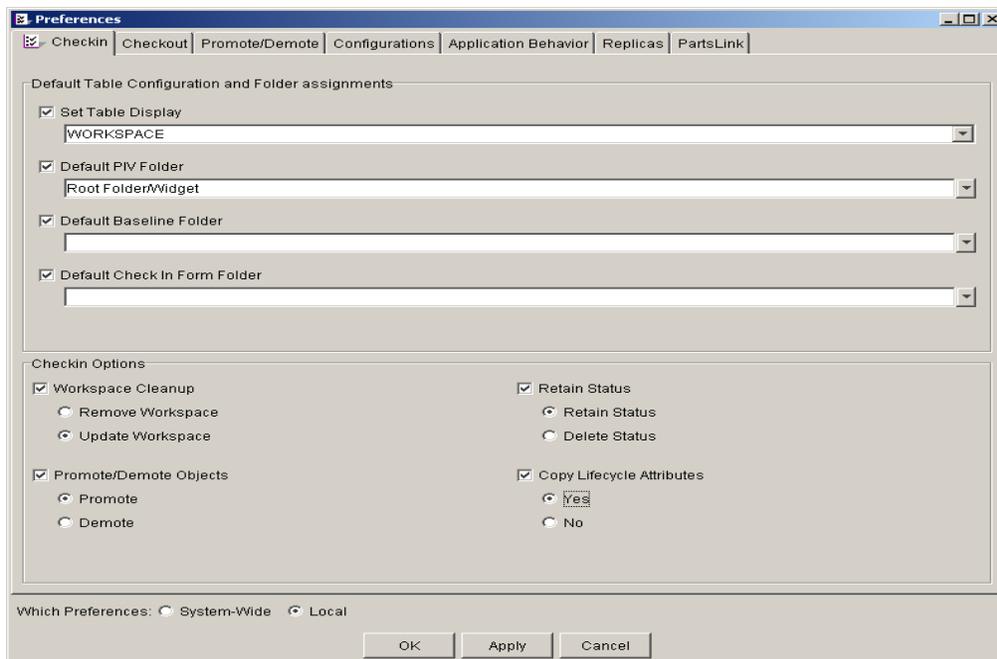
The personal work area, a.k.a **WORKSPACE**, helps users manage their work in relation to others. Tightly integrated with Pro/ENGINEER, local information management activities are incorporated seamlessly into the design process. All local design changes are maintained here. Users may work independently while openly communicating to, and receiving information from, the Commonsplace. Changes made in either Pro/ENGINEER or Pro/INTRALINK are shared between the two systems.

Name	Description*	Material	Workspace Status	Commonspace Status	Compare Status	Release Level
axlebox.prt	--	--				Concept
bolt.prt	--	--	Modified/Read only			Concept
bolt1.prt	--	--				Concept
bolt_b.prt	--	--				Concept
bolt_b.xpr	--	--				Concept
bolt_c.prt	--	--				Concept
bolt_c.xpr	--	--				Concept
c_assy_bom.frm	--	--				Concept
c_part.frm	--	--	Read only			Concept
d_size_part.frm	--	--				Concept
disk.prt	WIDGET ASSY DISK	--	Read only			Concept
dowel.drw	--	--	Read only	Locked by: Denise		Concept
dowel.prt	WIDGET ASSY DOWEL	CARBON STEEL				Concept
hanger.asm	WIDGET HANGER ASSY	--	Read only			Concept
peg_board.prt	WIDGET PEGBOARD	--	Read only			Concept
screw.prt	WIDGET ASSY SCREW	--	Read only			Concept
spindle_97597.drw	--	--				Concept
spindle_97597.prt	SPINDLE HOUSING, C...	--				Concept
widget.asm	WIDGET ASSY	--	Modified			Concept
widget.doc	--	--	Read only			Concept
widget_asm.drw	--	--				Concept

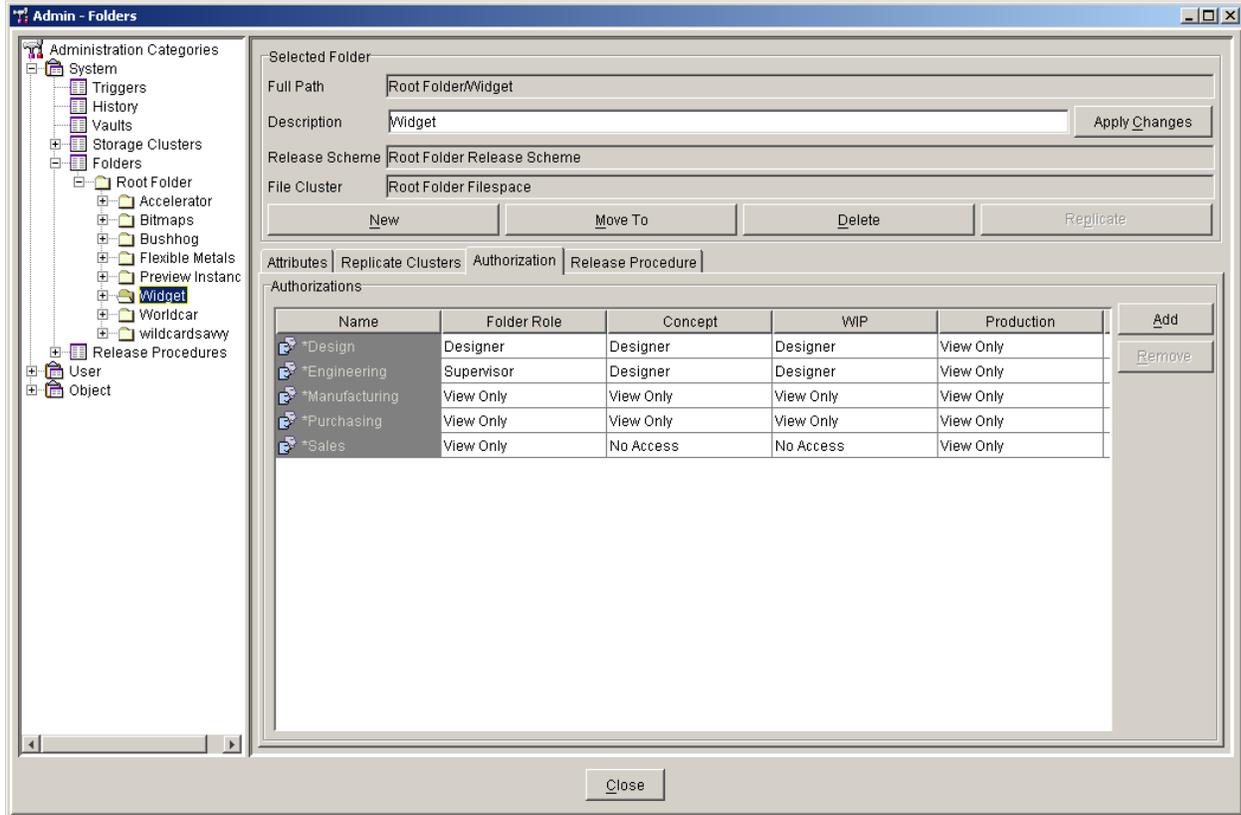
Some of the other applications Pro/INTRALINK offers are the **LOCATE** tool, which assists users in finding information within the Commonsplace. Virtually any system-created or user-defined attribute is searchable. A set of standard searches may be created and saved for later use.



The **PREFERENCES** application enables the establishment of predefined tasks and functions, minimizing the steps necessary to complete a task and ensuring consistency throughout the development process. This also allows a company to “tune” Pro/INTRALINK to their specific working environment.



The **ADMIN** tool simply allows the setup and maintenance of the Pro/INTRALINK environment through the use of an intuitive interface.



Hopefully this has given you a better idea of Pro/INTRALINK's capabilities. Powerful tools for searching, inter-user communication, reporting, version management, and configuration control ensure Pro/INTRALINK's capabilities can aid your product development process!

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PTC Product Focus

How do Product Structures Get Into Windchill PDMLink?

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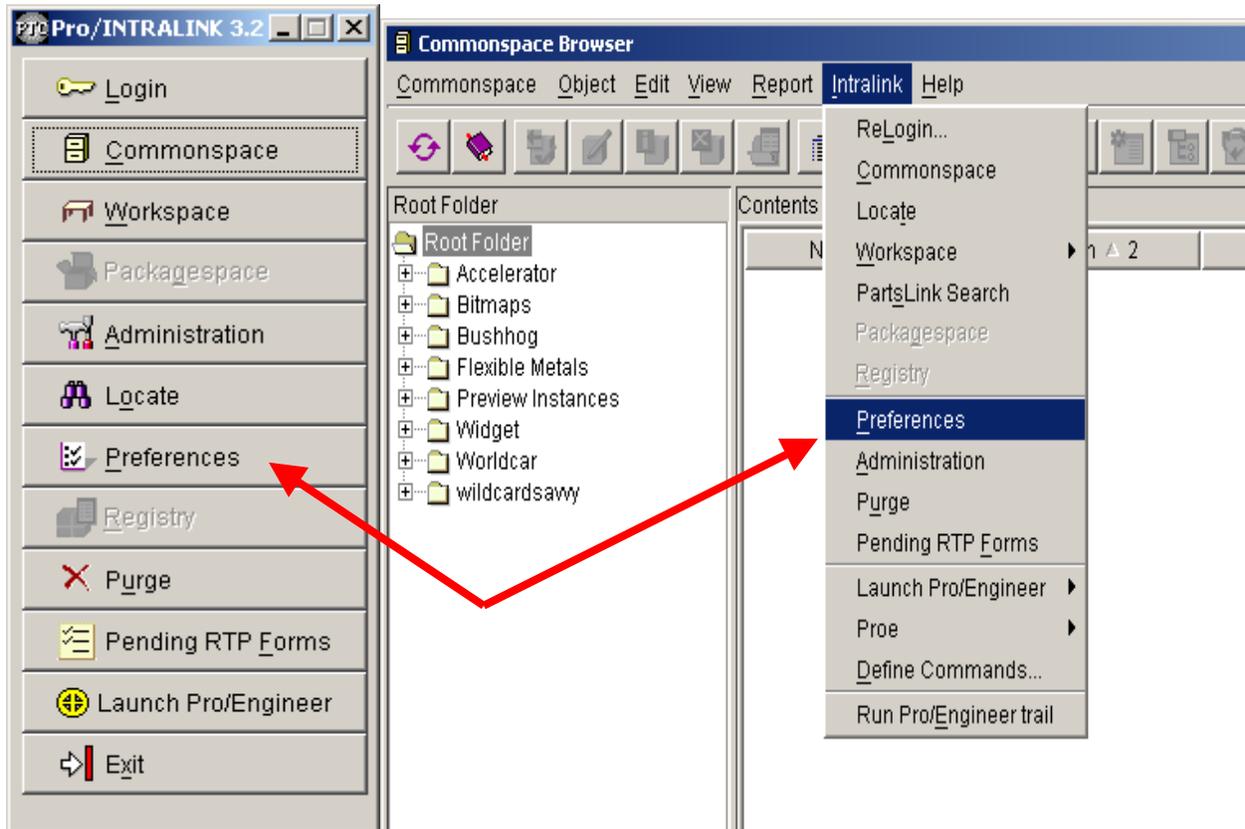
Tips of the Week

Controlling Your Pro/Intralink Environment w/ Pro/Preferences

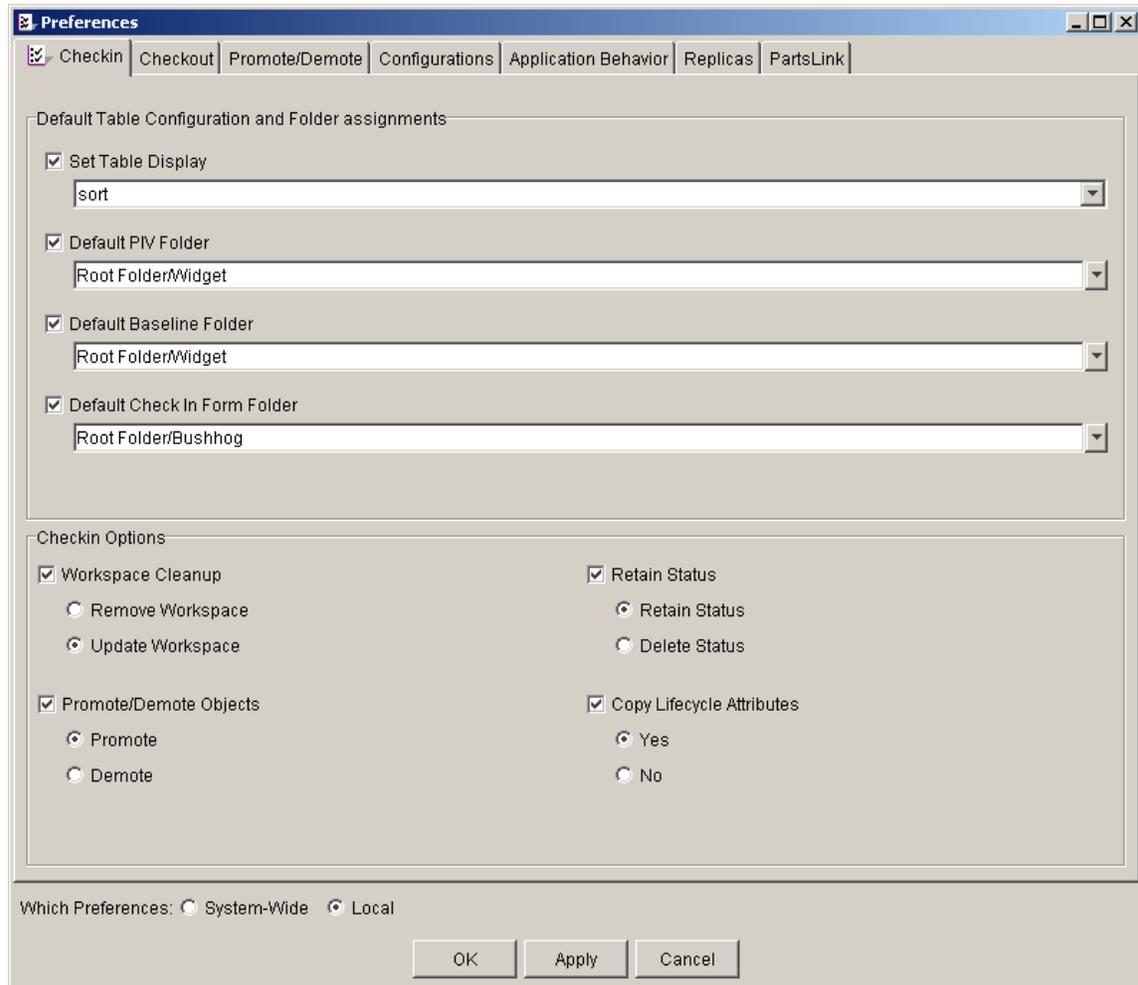
This tip describes the procedure to take more control of your working environment in Pro/INTRALINK using Pro/PREFERENCES.

NOTE: This document was constructed using version 3.2 of Pro/INTRALINK but should be virtually the same for all 3.x releases. If you are still on 2.0 – well, you need to upgrade! Also, please be advised that you can set “system-wide” or “local” preferences. As you might expect, you need to be an administrator to set “system-wide” preferences. “Local” preferences only affect the user who creates them, BUT they OVERRIDE “system-wide” preferences! Also, please note **preferences are just defaults**. You can override all preference values when you actually perform a task. This document is targeted toward users, not administrators.

First, let’s go into Pro/PREFERENCES – you can get there either from your main login box or through the “Intralink” menu:



Now, let's take a look at the "Checkin" tab:



Set Table Display – this lets you set the table display you will see immediately upon selecting something to check-in – you'll see it in the "check-in" dialog box.

Default PIV Folder – this simply sets a default folder for you so you don't have to manually set it in the Workspace – remember you can always move stuff later!

Default Baseline Folder – similar to default PIV folder if you are using baselines.

Default Check In Form Folder – new to the 3.x releases, check-in forms basically take a snapshot of the check-in dialog you see after selecting something to check-in.

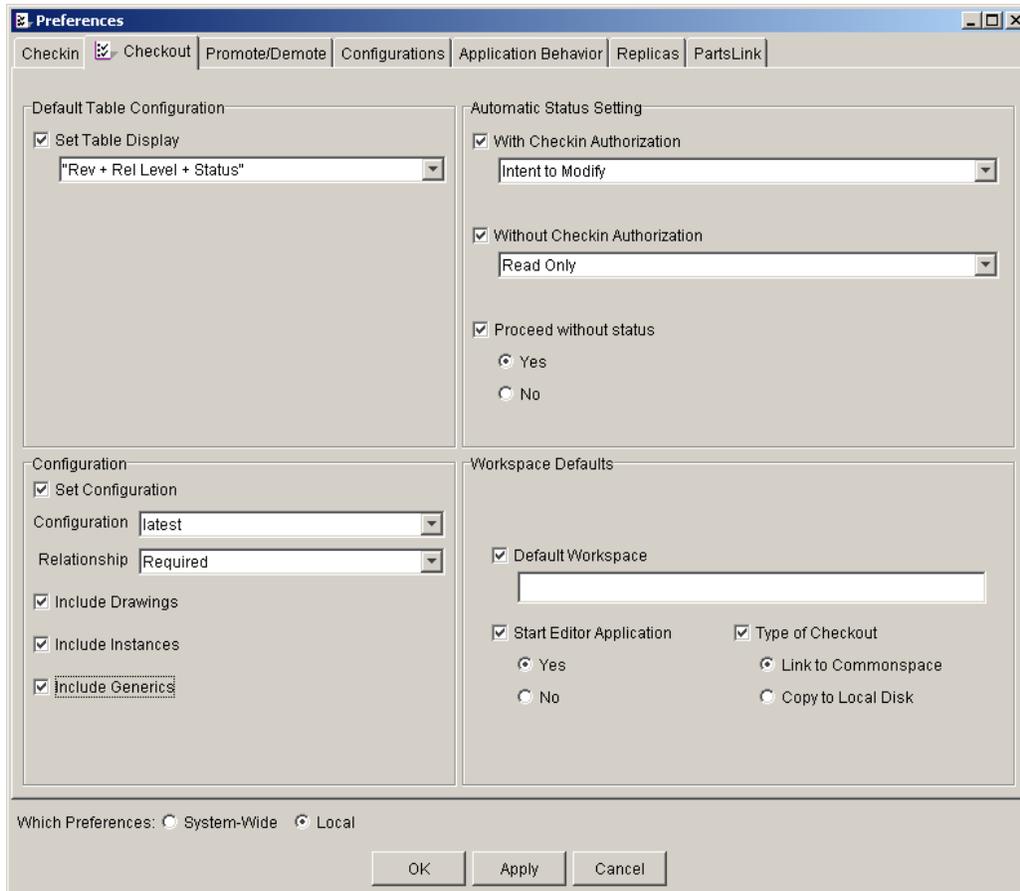
Workspace Cleanup – do you want to remove the current workspace after check-in or simply update it? I recommend setting this to "update" or just leave this section alone.

Retain Status – do you want to retain an object's Commonsplace or Workspace status after checking the object in?

Promote/Demote Objects – you can have the system automatically initiate a promotion or demotion process upon check-in.

Copy Lifecycle Attributes – this simply specifies whether life-cycle attributes are copied as part of the check-in process.

OK, let's take a look at the "Checkout" tab:



Set Table Display – this simply sets the table display you'll see in the "check-out" dialog box.

With Checkin Authorization – this will put an automatic status setting on any object you check-out that you have permission to check back in.

Without Checkin Authorization – one of my personal favorites, if you check out an object that you don't have permission to check back in, why not slap a Read Only status setting on it?

Proceed without status – if a conflict is encountered from the 2 settings just mentioned (ex. an assembly where some parts you have authorization and some you don't), should Pro/INTRALINK proceed with the check-out or not?

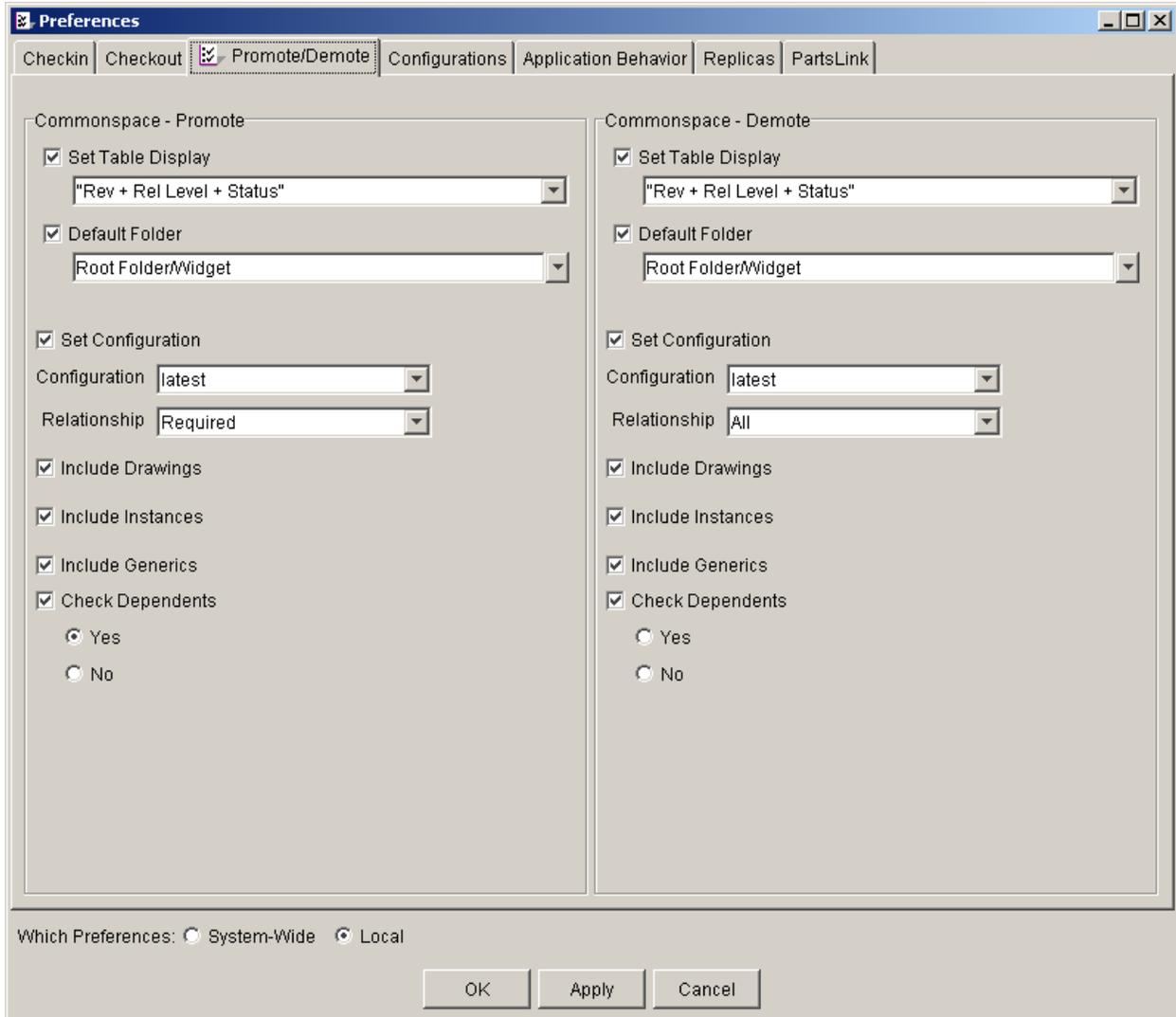
Set Configuration – when performing a check-out, what check-out configuration do you want to use? Ex. latest, as-stored, or any custom check-out configurations you have created. Also, what relationship criteria do you want to default? Ex. All, Required, or None. "All" checks out EVERYTHING associated to the object you have selected. "Required" only checks out things needed for Pro/E regeneration. "None" will ONLY check-out the object you have selected. Also notice in this section you can have the system go ahead and check-out associated drawings, instances, and generics.

Default Workspace – just type in the name of the Workspace you want to be your "go-to" WS.

Start Editor Application – do you want to automatically start up the editing application for an object as soon as you check it out?

Type of Checkout – use "Link" if you are only working on metadata, use "copy" otherwise.

Next, let's take a look at the "Promote/Demote" tab:

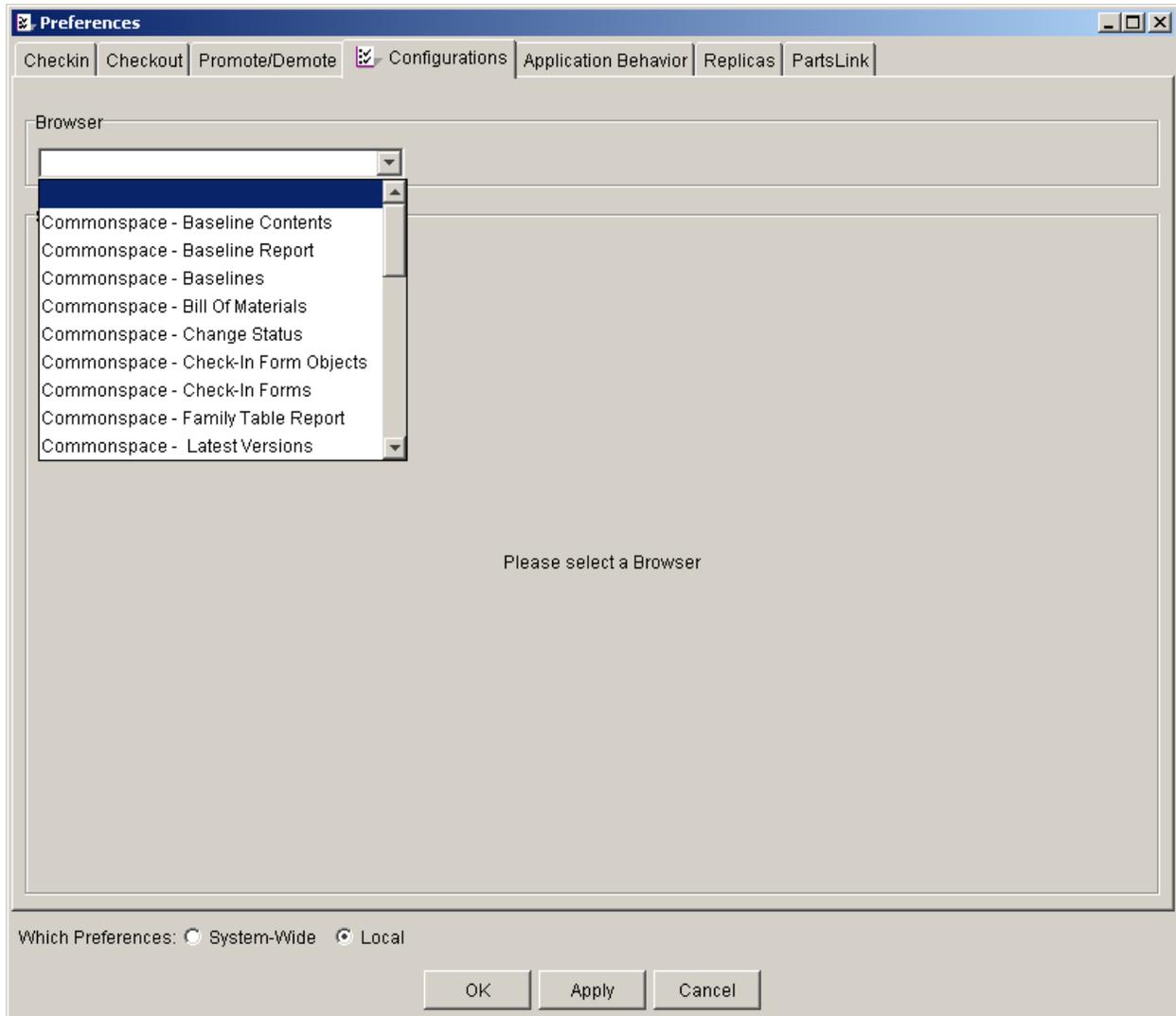


Everything here is almost identical to the previous section with the exception of:

Check Dependents – do you want Pro/INTRALINK to check for any dependent objects of the object you are promoting/demoting and also initiate a promotion/demotion for those objects?

Note that the left side of the browser window is for the default behavior when doing a promotion. The right side sets the default for demotions.

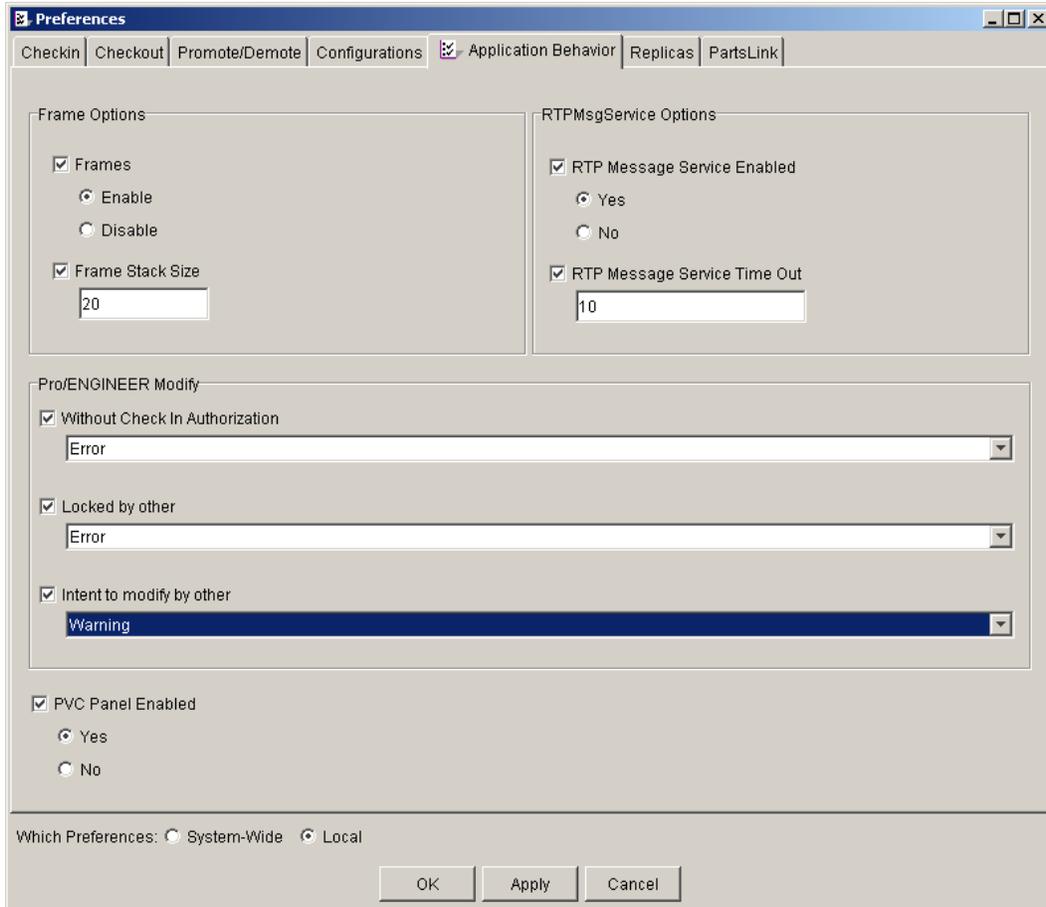
Let's take a look at the "Configurations" tab:



Here you can set the default table display you will get when doing various operations in the system such as a Bill of Materials report or a change of status.

Be forewarned, the list is long! Make sure to check it out, though, if you find yourself changing displays often your answer is probably right here!

Next, we come to the “Application Behavior” tab:



Frames – this is asking you whether you want to utilize frames or not. I HIGHLY recommend setting this to “Enable”.

Frame Stack Size – based on the number you type in here, the system will purge your oldest frame when you reach your “stack” limit. Ex. Here I have typed in 20 – once I try to create frame 21 it will automatically purge the oldest frame. The intention here is to help with the problem of the local database files becoming EXTREMELY large.

RTP Message Service Enabled – if you have an object waiting your approval for promotion or demotion – this sets whether or not you get a message when you are in the Intralink client.

RTP Message Service Time Out – how often should the system check for these messages? (in minutes)

Without Checkin Authorization – if you don’t have authorization to check an object back in, how do you want Pro/E to react when you try to modify the object? Do you want Pro/E to do nothing, give you a warning and still let you proceed, or give you an error and prohibit you from modifying the object?

Locked by other – how do you want Pro/E to react if you try to modify a “locked” object?

Intent to modify by other – how do you want Pro/E to react if you try to modify an “intent-to-modify” object?

PVC Panel Enabled – set this to YES!!!! This gives you a cool graphical preview for parts, assemblies, and drawings when you do an Information Report.

So, that should give you a better understanding of Pro/PREFERENCES in Pro/INTRALINK. It is possible, depending on which release of Pro/INTRALINK you are on, that you may see additional tabs such as “Replicas” or “PartsLink.” These tabs are not within the scope of this document as those things need to be configured by THE system administrator only and would typically always be a “system-wide” preference.

Again, please note that “local” preferences will override “system-wide” preferences. If you don’t specify anything at the local level it will obviously default to using the “system-wide” preference for that specific setting. Also, please remember that preferences are just defaults, virtually all preferences we have discussed can be changed very easily upon actually performing the action that the preference setting references.

With that in mind, take control of your Pro/INTRALINK environment!

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Tips of the Week

Windchill PDMLink – Product Structure – How To View & Compare Bill of Material in Different Ways?

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Announcements

Customer PTC E-Newsletter Survey

For the past 2 years I've been sending you our Customer PTC E-Newsletter such as this one.

In an attempt to deliver the highest quality and create the most value we would like to use this survey to further our "Learning" Relationship with you, our Customers. Even if you are a first time recipient of the newsletter, please feel free to share your comments on this one you're reading.

It will not take longer than a few minutes to fill out this quick survey as your input is invaluable and we greatly appreciate your input. Please click on the following link to begin:

[To Enter Survey, Please Click](#)

Please note it may be impossible to "Customize" the newsletter to meet every individual request however we will attempt to integrate as many ideas as possible.

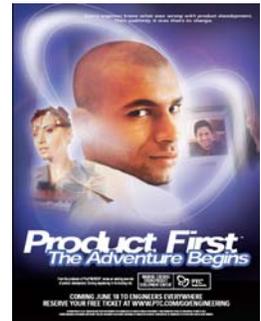
Thank-you very much for your time and feedback as we try to improve this value-added service.

PTC Sponsored Events

Click below to see PTC sponsored events:

<http://www.ptc.com/company/news/events/index.htm>

Click on the poster to gain access to the Product First Virtual Event resource center!! See the software and pick up a screen-saver or two.



E-PROFILES IS HERE!!

We have been eagerly anticipating the debut of the new electronic version of Profiles Magazine and now it is here! This new web site will supplement the print edition of the magazine and will provide new useful features not feasible with paper media. e-Profiles will provide you with 24x7, worldwide access to key information previously available exclusively in the print version. "Tips & Tricks," a popular feature pioneered by Pro/USER, has also moved to the web and will be expanded as the site matures. Future plans include several foreign-language editions of Profiles for our many international readers. Currently, Profiles is printed in English and Japanese.

Please take a few minutes to check out this new web site. We don't think you will be disappointed.

<http://profilesmagazine.com/>

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Upcoming Events & Training Class Schedules

Upcoming, 2003

Your local Pro/Engineer User Groups

<http://www.prouser.org/rugs/>

June 8 - 11, 2003

Pro/USER International Conference - Orlando, FL

<http://www.prouser.org/>

Please visit the [PTC Education Services](#) website for the latest training information including course descriptions, schedules, locations, and pricing.

- Attend a course at any PTC Center and receive a **free** copy of Pro/E 2001 Student Edition!

<http://www.ptc.com/services/edserv/index.htm>

PTC

Note: This PTC E-Newsletter will continue to be used for the following:

- 1) Inform you on events related to PTC products (user groups, conferences, training schedules, etc.)
- 2) Educate you on products that are available at PTC
- 3) Tips & Techniques using PTC Products

Note: These messages are compiled in the local PTC office and will be distributed via e-mail.

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