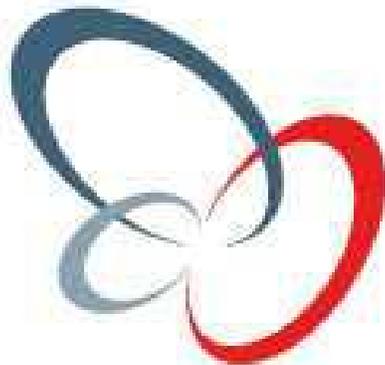


Intralink 3.0: Rollout Workshop for Users



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Objective:

At the end of this tutorial, you will be able to:

- Transition to Intralink 3.0 from Intralink 2.0 in a time efficient manner.
- Review common functions that every user will need to perform when using 3.0.

Overview:

Intralink 3.0 has been significantly improved in the areas of user interface and most importantly in speed. With 3.0, Intralink now has a database built on Oracles 8i database and the client has been totally rebuilt using Java.

Metric:

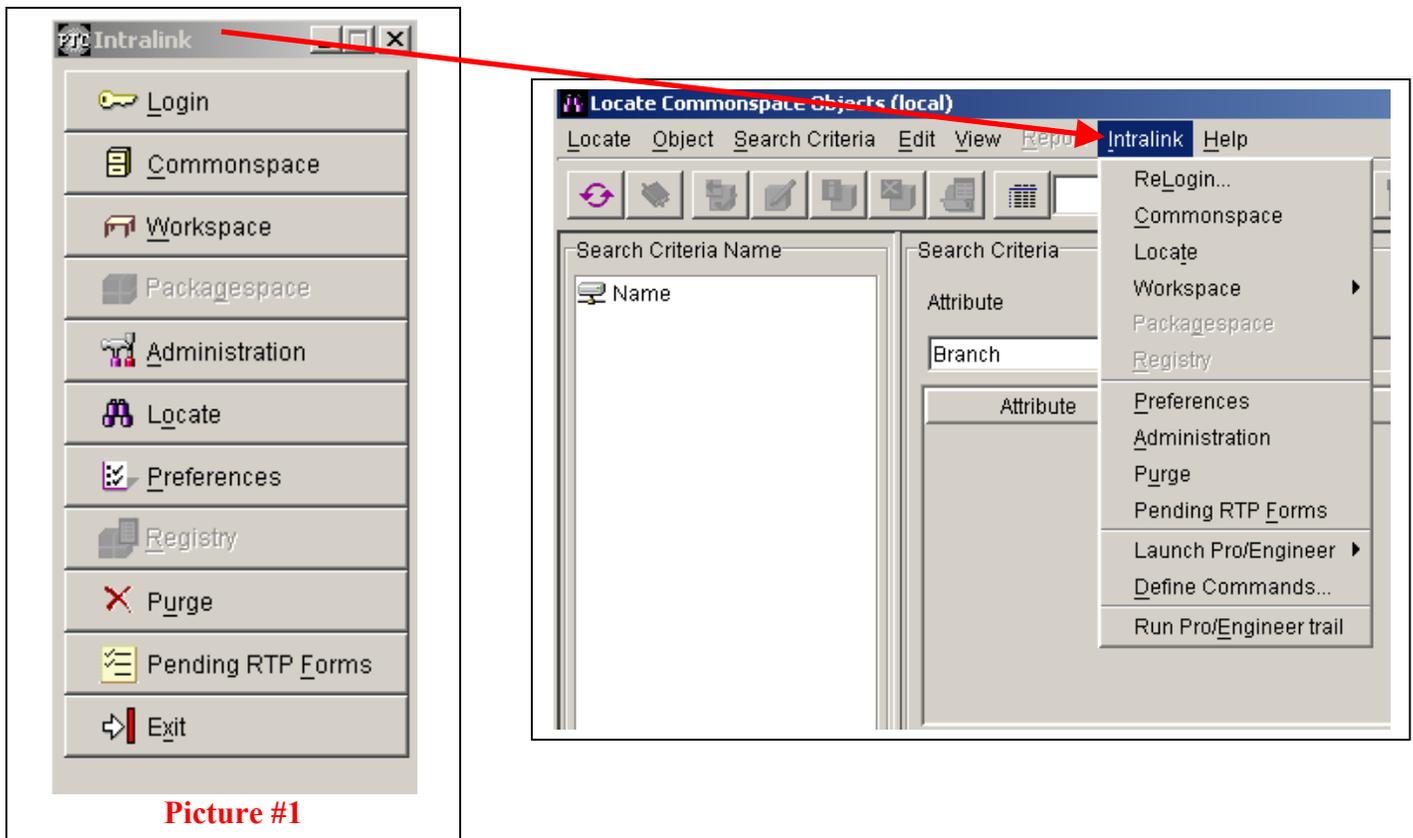
Version 3.0 of Intralink's client was re-written in Java with a major goal of enhanced performance. On average, most operation times were reduced between 30 and 50%!

30 to 50% Faster!

Rollout Workshop:

For this introduction, we'll take the users through the most common functions of Intralink starting with the search tools, then progress into Workspace functions and finally show the interaction with the Commonsapce.

The first thing you'll notice when you start Intralink is that a new interface window that unifies the different Intralink functions has replaced the old application manager. After you've selected a function, this common Intralink window will disappear and be integrated into a pull down menu titled "Intralink".



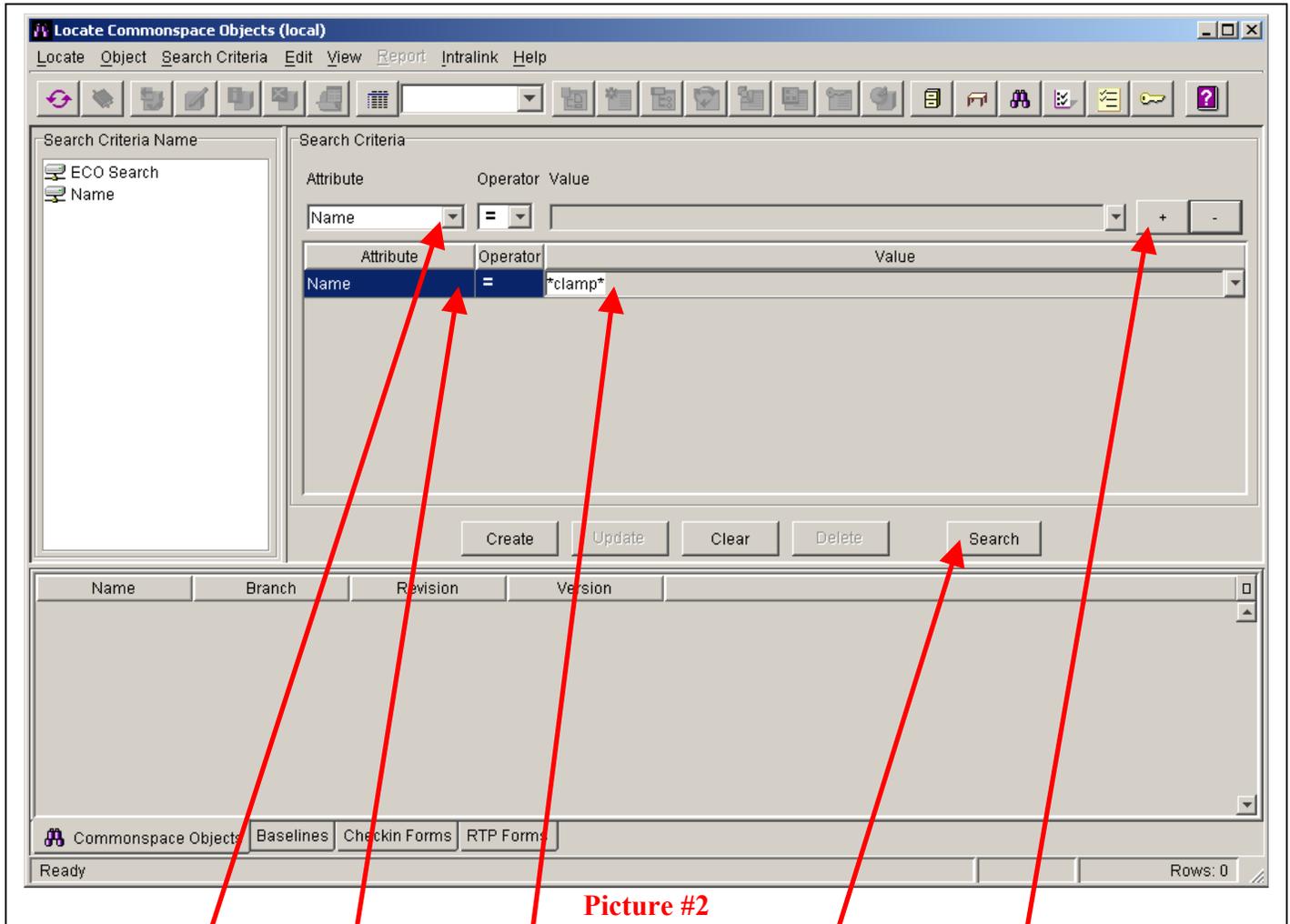
New common interface when you start Intralink.



Gets integrated automatically into any Intralink window you're currently working in.

Step 1: Perform a local search. Select on the LOCATE button.

- a) Using the pull down bar, select the attribute you'd like to search on (we'll use Name for this example).
 - b) Click the "plus" icon to add this search attribute.
 - c) Double click in the value field and you'll be able to type what you're looking for.
- Note:** You can use wildcards (*) to search for patterns of text or numbers and also keep in mind that these searches are case sensitive.
- d) After you've typed in the value, click once here to finish the entering of data.



Picture #2

Step A

Step D

Step C

Step E

Step B

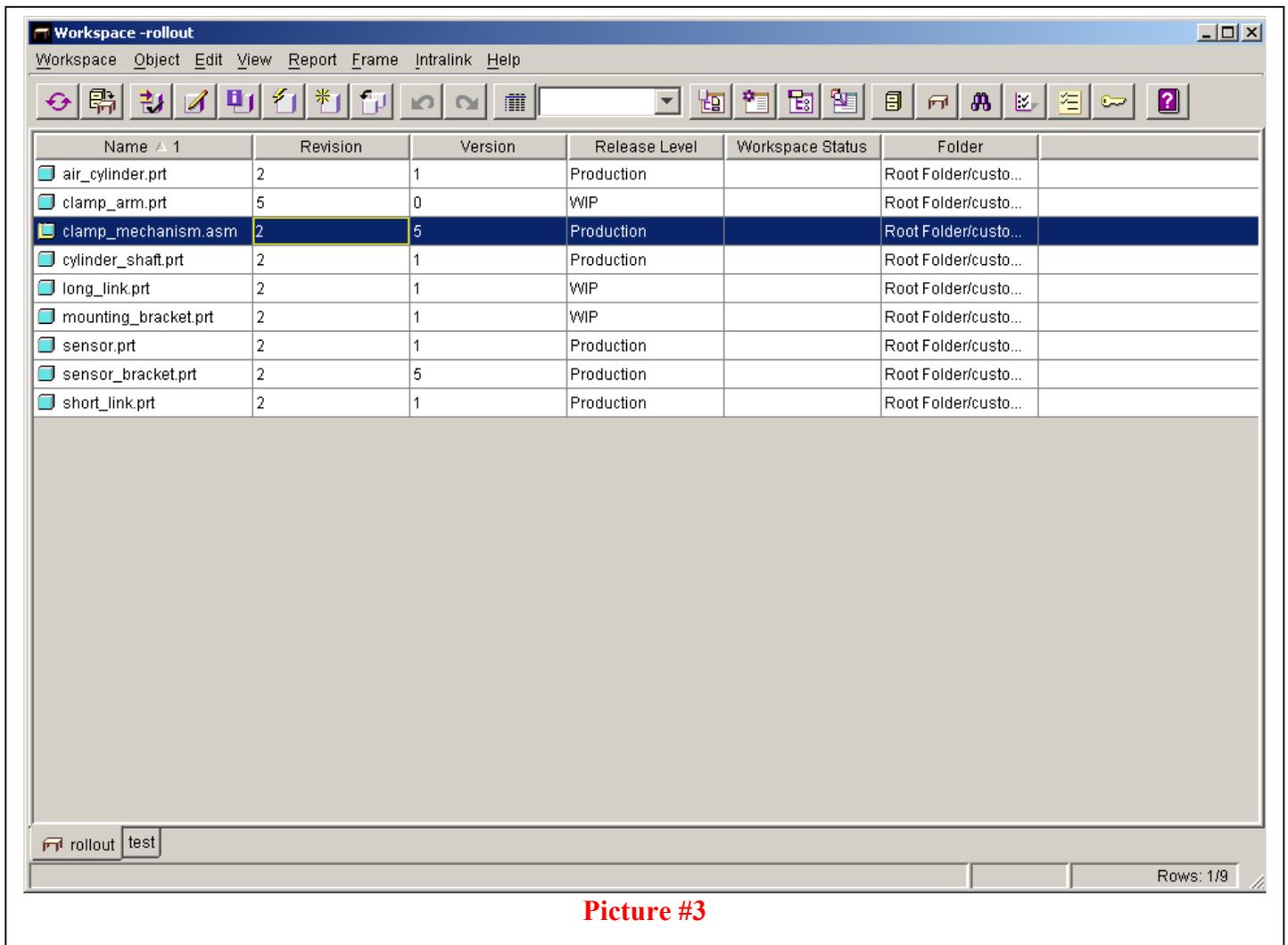
Things to keep in mind about searches:

- You can save commonly used searches by selecting CREATE after all of the attributes are updated. This is highly recommended as it reduces steps down to two rather than five.
- To use a saved search, simply highlight the name of the search and then follow the steps above starting at Step C. **Note:** when you are editing the “Value”, don’t just hit return when finished because this causes another line item to be added, instead do Step D.
- Once a search has been performed you’re able to perform actions on the object just like in commonspace. Examples are: check out, part info, assembly reports.
- “Briefcase” feature allows you to collect objects from many different searches and then do one operation on them rather than several separate checkouts etc. After you’ve searched for an item, simply select OBJECT, ADD TO BRIEFCASE to have it added. To view the briefcase, select VIEW, BRIEFCASE.

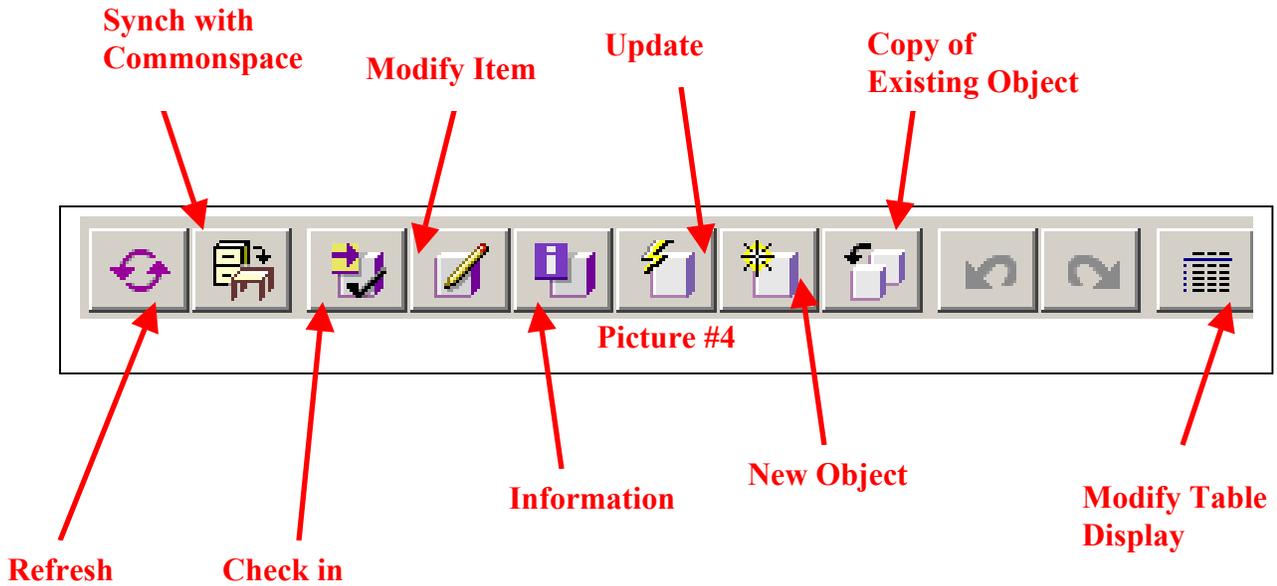
Step 2: Check out an assembly from the “Search” box into a new Workspace (Picture #3).

Things to Note about Workspace:

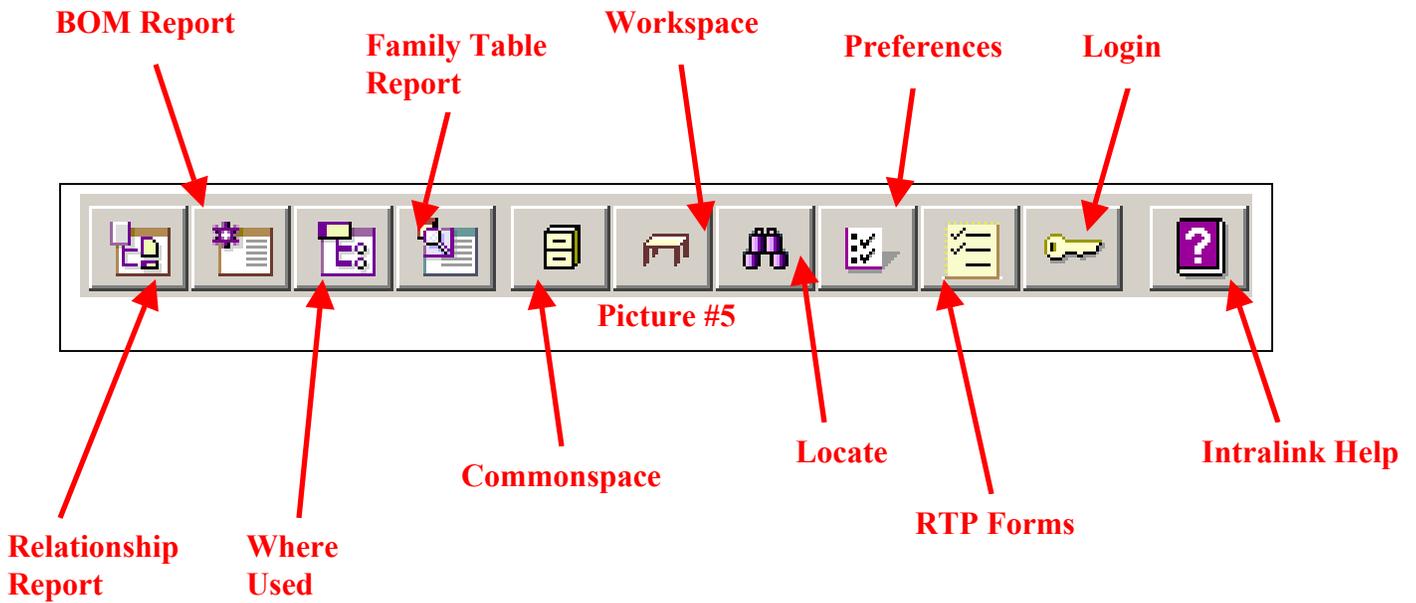
- Frames are disabled by default; go to preferences to enable them.
- To reorder columns in the display, simply drag and drop on the separator bar.
- The DELETE key can be used to delete an object once it’s highlighted.
- You can access most commands simply by selecting the right mouse button.
- To **set the folder** of a new object:
 - Highlight the object
 - Select OBJECT, MODIFY (or use icon, or use F2)
 - Use pull down to select “Folder”
 - Highlight the folder you’d like to assign and select APPLY, OK.



Picture #3

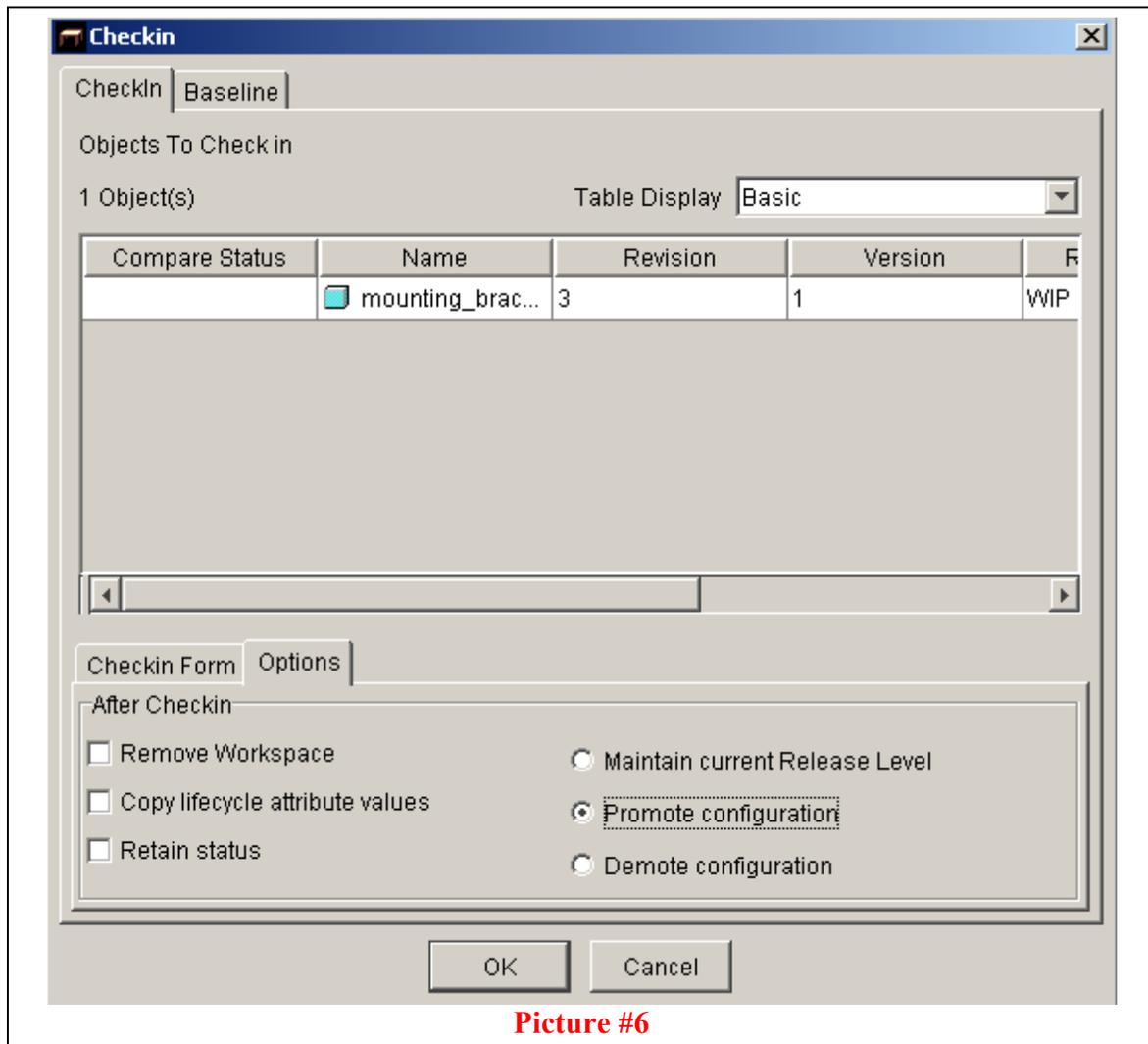


New Icon Toolbars in the Workspace



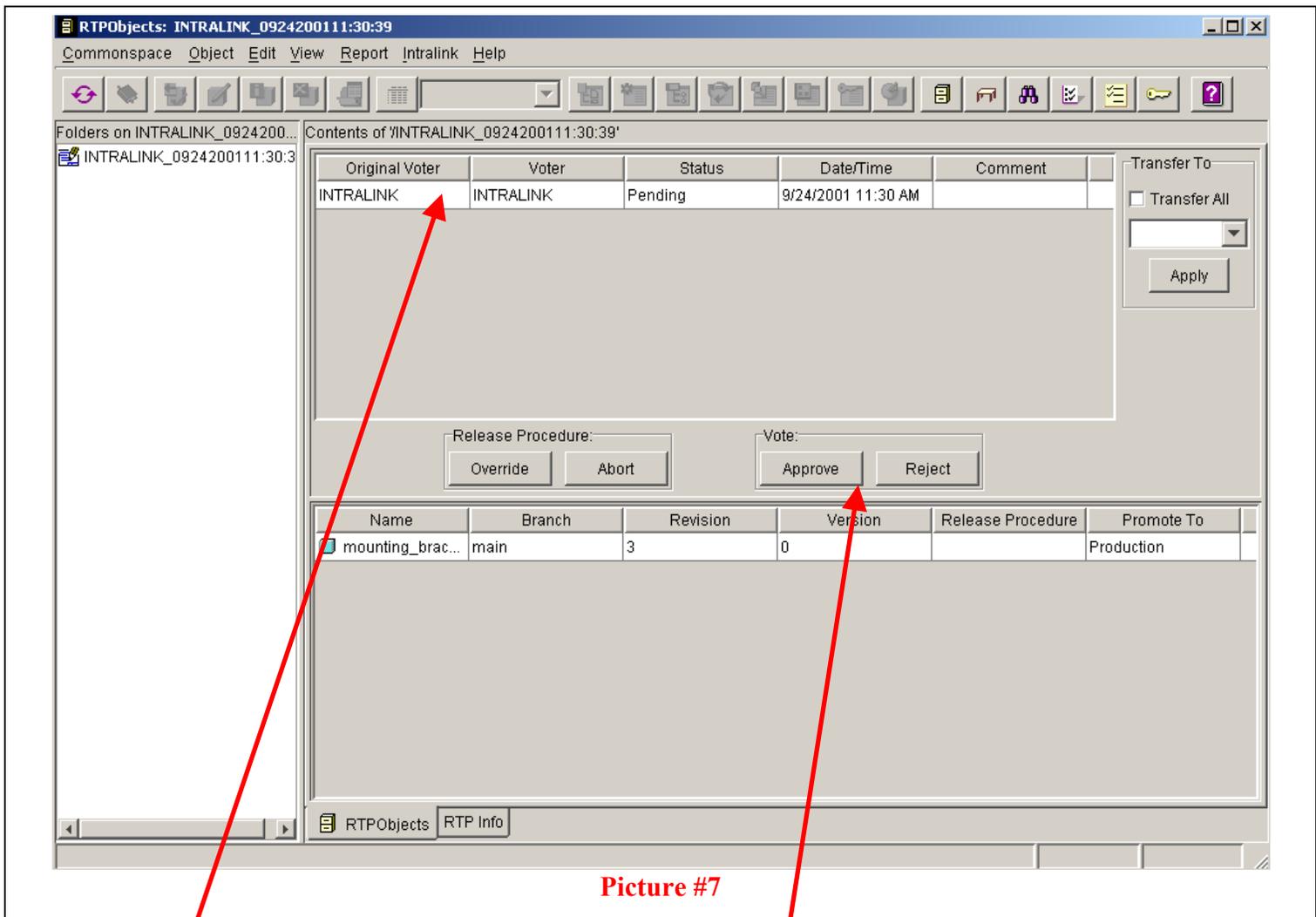
Step 3: Check in an object that is modified (Picture #6).

- When you have either a new object or one that has been modified and are ready to check in, you will see a new dialog box.
- The first tab CHECKIN FORM allows you to enter a description as to what the change is.
- Tab two, OPTIONS, allows you to promote or demote an object during the check in process (depending on your authorization of course).



Step 4: Approve a release level change using the new RTP function.

- a) After an object has been submitted for approval, select on the RTP icon.
- b) You will see a listing of all objects needing your approval. Highlight the appropriate objects and then click the INFORMATION icon.
- c) Now you'll see a quick summary of the object needing approval, select on the RTP OBJECTS tab and your window will look like Picture #7.
- d) Now you have several choices available to you, namely; Approve, Reject, Override, or Abort. Simply select the appropriate action and you will be prompted to enter in additional comments. The submitter will now receive an email notifying him of the action that occurred.



Highlight the object to approve

Select the appropriate action

Key Vocabulary for Intralink 3.0:

Attributes: *These are fields of information that you wish to track with an object. Examples of these include: revision, name, designer, vendor, material, etc. Notice that some attributes are there by default, these are called system attributes, others can be added by an administrator and can relate to anything. Also note that attributes in Intralink can be passed and modified bi-directionally with attributes in Pro/E.*

Commonspace: *Central repository where all users will securely store their files after check in. This is what allows associativity between all users of Intralink...a single database architecture.*

JRE: *Java Run time Environment. Intralink 3.0 client was written with Java and so needs a JRE to run on the client system (this is included on the Intralink cd's).*

Locate: *A powerful search tool that allows you to search for any combination of user or system defined attributes of a part in the commonspace. Further, you are able to perform "compound searches" where your criteria could be two or more attributes (such as: vendor name and designer name).*

Metadata: *An information technology term for "data about data". Example: A Pro/E file is the data you are managing, the information about that file are things like: date it was created, who modified it, revision, etc. This supporting data is generically called metadata.*

Table Configuration: *This is where you decide what will be displayed in either the workspace or the commonspace. Any system attribute or user defined attribute can be added as a column in the table. Lastly, you are able to have multiple table displays configured so that you can quickly toggle between them.*

User: *The ability to pick a location on a part and using the mouse, move the assembly through it's range of motion. Also with the drag function is an ability to snapshot a particular orientation (see Snapshot).*

Workspace: *A users individual working area on their local computer where they perform both geometry changes on CAD files and also metadata changes on objects. Other users are not able to see another users workspaces, but electronic control is maintained on each one so that alerts are made when changes occur (such as: new objects added, parts are modified, or parts are out of date).*



Tutorial Evaluation:

Title:	<input type="checkbox"/> Engineer <input type="checkbox"/> Designer <input type="checkbox"/> Draftsmen <input type="checkbox"/> Mfg. Engr. <input type="checkbox"/> Tech. Pubs. <input type="checkbox"/> Analyst					
PTC Products Used:	<input type="checkbox"/> Foundation <input type="checkbox"/> Advanced Assembly Extension <input type="checkbox"/> Advanced Surface Extension <input type="checkbox"/> Behavioral Modeling <input type="checkbox"/> Intralink <input type="checkbox"/> Modelcheck <input type="checkbox"/> All					
Time using Pro/E:	<input type="checkbox"/> 0-6 months <input type="checkbox"/> 6-12 months <input type="checkbox"/> 1-2 years <input type="checkbox"/> 2-5 years <input type="checkbox"/> 5+ years					
1 – Strongly Disagree 3 – Agree 5 – Strongly Agree						
1. This tutorial content met my expectations:	1	2	3	4	5
2. The exercise was easy to understand:	1	2	3	4	5
3. This tutorial will help me on current projects:	1	2	3	4	5
4. These techniques make Pro/E a more effective tool:	1	2	3	4	5
5. These techniques will increase my speed using Pro/E:	1	2	3	4	5
What concepts/techniques learned from this tutorial will you apply on the job?						
1)						
2)						
3)						
What would you like to see as a future tutorial at your company?						
1)						
2)						
3)						
What can be done to improve these tutorials for your company?						
1)						
2)						
3)						

Additional Comments: