



Getting Started with Pro/INTRALINK® 8.0

Pro/INTRALINK 8.0

June 2005

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About This Guide

The *Getting Started with Pro/INTRALINK 8.0* guide is intended to introduce users and administrators of Pro/INTRALINK 3.x to the changes that must be understood in order for an effective adoption of Pro/INTRALINK 8.0.

It is assumed that the reader has access to the complete Pro/INTRALINK 8.0 documentation set, including the guides listed in the Related Documentation section.

Each chapter contains basic information about Pro/INTRALINK 8.0 and includes references to additional Windchill documentation for further information. It also gives detailed information about anything that is related specifically to Pro/INTRALINK 8.0.

Note: The Pro/INTRALINK 8.0 and Windchill PDMLink documentation set includes information specific to Windchill PDMLink. Rely on this guide to indicate the most relevant sections of the Pro/INTRALINK 8.0 and Windchill PDMLink documentation.

Related Documentation

The following documentation is directly referenced in this guide and will be useful for further information:

- *Pro/INTRALINK 8.0 and Windchill PDMLink User's Guide*
- *Guide to Using Pro/ENGINEER Wildfire with Windchill*
- *Windchill Business Administrator's Guide*
- *Windchill System Administrator's Guide*
- *Windchill Customizer's Guide*
- *Windchill Application Developer's Guide*
- *Windchill Installation and Configuration Guide*
- *Windchill Archive Administrator's Guide*

If these books are not installed on your system, see your system administrator.

Technical Support

Contact PTC Technical Support via the PTC Web site, phone, fax, or e-mail if you encounter problems using Windchill-based applications.

For complete details, refer to Contacting Technical Support in the *PTC Customer Service Guide* enclosed with your shipment. This guide can also be found under the Support Bulletins section of the PTC Web site at:

<http://www.ptc.com/support/index.htm>

The PTC Web site also provides a search facility that allows you to locate Technical Support technical documentation of particular interest. To access this page, use the following link:

<http://www.ptc.com/support/support.htm>

You must have a Service Contract Number (SCN) before you can receive technical support. If you do not have an SCN, contact PTC License Management using the instructions found in your *PTC Customer Service Guide* under Contacting License Management.

Documentation for PTC Products

PTC provides documentation in the following forms:

- Help topics
- PDF books

To view and print PDF books, you must have the Adobe Acrobat Reader installed.

All Windchill documentation is included on the CD for the application. In addition, books updated after release (for example, to support a hardware platform certification) are available from the Reference Documents section of the PTC Web site at the following URL:

<http://www.ptc.com/appserver/cs/doc/refdoc.jsp>


Comments

PTC welcomes your suggestions and comments on its documentation. You can submit your feedback through the online survey form at the following URL:

http://www.ptc.com/go/wc_pubs_feedback

Documentation Conventions

Windchill documentation uses the following conventions:

Convention	Item	Example
Bold	Names of elements in the user interface such as buttons, menu paths, and window titles. Required elements and keywords or characters in syntax formats.	Click OK . Select File > Save . License File window create_<tablename>.sql
<i>Italic</i>	Variable and user-defined elements in syntax formats. Angle brackets (< and >) enclose individual elements. Book titles	create_<tablename>.sql
Monospace	Examples Messages	JavaGen "wt.doc.*" F true Processing completed.
"Quotation marks"	Strings	The string "UsrSCM" . . .
	The CAUTION symbol indicates potentially unsafe situations which may result in minor injury, machine damage or downtime, or corruption or loss of software or data.	When you add a value to an enumerated type (for example, by adding a role in the RolesRB.java resource file), removing that value can result in a serious runtime error. Do not remove a role unless you are certain there is no reference to it within the system.

1

Getting Started with Pro/INTRALINK 8.0

This chapter introduces concepts new with Pro/INTRALINK 8.0, including information about terminology and a high-level comparison of functionality between Pro/INTRALINK 3.x and Pro/INTRALINK 8.0.

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About Pro/INTRALINK 8.0

Pro/INTRALINK 8.0 is the latest version of PTC's industry leading Pro/ENGINEER Workgroup data management software. This new release includes significant enhancements to simplify Pro/ENGINEER data management, enhance end-user productivity, improve security, improve integration with PTC's Product Development System, and better support global Pro/ENGINEER collaboration.

To deliver these improvements, this latest release of Pro/INTRALINK has been released on a new Web-based architecture powered by the Windchill 8.0 platform. As such, this new release represents a significant change for existing Pro/INTRALINK users. Therefore, customers who have deployed previous versions of Pro/INTRALINK are encouraged to review this guide and the other Pro/INTRALINK 8.0 documentation thoroughly before initiating their installation and migration activities. Comprehensive training and deployment services are also available to help ensure a successful Pro/INTRALINK 8.0 deployment.

In addition to the benefits mentioned above, the transition to a Web-based Windchill architecture has allowed PTC to deliver a common set of Pro/ENGINEER data management capabilities for Pro/INTRALINK, Windchill PDMLink, Windchill ProjectLink, and Windchill Foundation & PDM. Therefore, if a customer should decide to deploy one of these other Windchill-based solutions, they can be assured that they will have access to the same powerful Pro/ENGINEER data management capabilities that are provided in Pro/INTRALINK 8.0 plus the new capabilities provided by these solutions.



Pro/INTRALINK 8.0 Documentation

Pro/INTRALINK 8.0 and Windchill PDMLink share a common set of documentation. Throughout this guide, references are made to specific sections within those documents. The following is a list of the referenced documentation. Each document listed is linked to the PTC Documentation Reference Web site where you can choose to view and download the documents. You can also find these documents on the **Publications** page in Pro/INTRALINK 8.0.

- *Pro/INTRALINK 8.0 and Windchill PDMLink User's Guide*
- *Guide to Using Pro/ENGINEER Wildfire with Windchill*
- *Windchill Business Administrator's Guide*
- *Windchill System Administrator's Guide*
- *Windchill Customizer's Guide*
- *Windchill Application Developer's Guide*
- *Windchill Archive Administrator's Guide*

The non-administrator **Publications** page may appear similar to the following image:

Publications	
<u>Documentation Updates</u>	
User Documentation	
Getting Started with Pro/INTRALINK 8.0	Describes Pro/INTRALINK 8.0 functionality and directs users and administrators to other more detailed documentation.
Using Pro/ENGINEER Wildfire With Windchill	Provides an introduction to managing Pro/ENGINEER product data in Windchill.
What's New in Windchill Release 8.0	Describes new features and capabilities of Windchill Release 8.0.
Pro/INTRALINK 8.0 and Windchill PDMLink User's Guide	Explains basic concepts for a beginning user of Windchill PDMLink and Pro/INTRALINK 8.0, along with examples of usage in areas such as search and document management.

You can also click the **Help** button  available from windows and pages in Pro/INTRALINK 8.0. Any information specific to Windchill PDMLink is clearly marked with  or is noted in the About Pro/INTRALINK 8.0 online help topic available from most online help.

Note: These documents also contain information specific to Windchill PDMLink, Windchill ProjectLink, and Windchill Foundation & PDM.

Pro/INTRALINK 8.0 Terminology

See the [Pro/INTRALINK 8.0 Terminology](#) appendix for a comparison of the terminology differences between Pro/INTRALINK 3.x and Pro/INTRALINK 8.0. See the [Glossary](#) for definitions of terminology introduced with Pro/INTRALINK 8.0.

Pro/INTRALINK 3.x to 8.0 High-Level Comparison

The following table provides an at-a-glance comparison of the capabilities available in Pro/INTRALINK 3.x, Pro/INTRALINK 8.0, and Windchill PDMLink. More detailed descriptions of functionality and any differences are available in the corresponding sections of this guide.

Capability	Pro/INTRALINK 3.x	Pro/INTRALINK 8.0	Windchill PDMLink
Managing Documents (CAD and Non-CAD)			
Store and track versions of electronic documents (including Pro/ENGINEER CAD files and non-CAD files)	X	X	X
Define templates for different document types	X	X	X
Define and manage user-defined attributes for electronic document objects	X	X	X
Rename objects in the database apart from the CAD tool	X	X	X
Define rules to control access to objects in the database	X	X	X
Track and report object history (audit trail)	X	X	X
Use object type to define native viewing application	X	X	X
Select multiple objects and modify the value of a common attribute	X	X	X
Create user-defined relationships between Pro/ENGINEER objects and non-Pro/ENGINEER objects	X	X	X
Define different document types and assign a different life cycle and set of attributes for each type		X	X

Capability	Pro/INTRALINK 3.x	Pro/INTRALINK 8.0	Windchill PDMLink
Document history reports (rename history, save as history, location history)		X	X
Support multiple content files (for example, primary and secondary) for a single database object		X	X
Manage non-Pro/ENGINEER files as secondary content of Pro/ENGINEER objects (includes control over whether or not content is carried forward to new versions and iterations)		X	X
Support broad product information access with a Web browser-based user interface for enterprise users		X	X
Managing Products			
Create a baseline, a configuration of objects or bill of material, at a specific point in time for future reference	X	X	X
Check out and download specific configurations and/or versions of a design (for example, latest or named baseline) for use in a CAD application	X	X	X
Automatically track the as-stored (or as checked-in) configuration of a set of CAD objects	X	X	X
Configure part numbering and versioning schemes	X	X	X
Annotate bills of material (product structures) and 2D or 3D views	X (Requires Division ProductView)	X (Requires ProductView)	X

Capability	Pro/INTRALINK 3.x	Pro/INTRALINK 8.0	Windchill PDMLink
Completely define a digital product structure with associated documents created in various authoring tools (including CAD files, requirements, documents, and specification documents)			X
Effectivity-based change control			X
Define and manage alternate bill of materials			X
Define and manage substitutes (alternate parts), part occurrences, serialized parts, and product instances			X
Create and modify enterprise product structure which may or may not include heterogeneous CAD content			X
Designate and track serialized parts			X
Searching for Information			
Flexible searching tools for locating objects based on attribute values and multiple sets of criteria	X	X	X
Store searches and queries for future use	X	X	X
Search for objects in the database without leaving the Pro/ENGINEER environment		X	X
Search for text in documents (full text search)			X
Life Cycle and Change Management			
Define and track object life cycles (release levels)	X	X	X
End user Set State capabilities	X	X	X

Capability	Pro/INTRALINK 3.x	Pro/INTRALINK 8.0	Windchill PDMLink
Configure simple routing processes for releasing objects from one level or life cycle state to another	X	X	X
Viewable access from promotion form for non-Pro/ENGINEER users		X (Requires ProductView)	X
Task notification integrated with corporate e-mail		X	X
Ad-hoc approval/routing teams		X	X
Web-based review form for easy access		X	X
Pre-defined rules for Set State and Revise actions		X	X
Multiple version schemes		X	X
Subscription and notification tools for automatic e-mail notification of object changes		X	X
Track and monitor engineering change process statistics			X
Out-of-the-box closed-loop change process management			X
Define custom workflow-driven change process			X
Managing Workflows			
Document the configuration, policies, and procedures for the operation of the system in support of ISO 9000 or other business process initiatives	X	X	X
Use a graphical interface to create a workflow consisting of tasks and roles			X

Capability	Pro/INTRALINK 3.x	Pro/INTRALINK 8.0	Windchill PDMLink
Create automated tasks and assign role-based tasks in a workflow. This includes the ability to sequentially lay out tasks, so one must be completed before another begins.			X
Have multiple branches or paths, depending on conditions			X
Notify an individual of a new task via e-mail or when user logs into the system, and the ability to send notifications on task events (for example, overdue or complete)			X
Tools for Collaborative Product Development			
Lock objects from being changed	X	X	X
Replace contents of workspace and Pro/ENGINEER session with new designs from database	X	X	X
Communicate a designer's intention to modify an object	X (intent-to-modify status)	X (Lock object)	X (Lock object)
Easily and securely share data with suppliers across firewalls		X	X
Automatically warn users when changing objects that are not checked out, that is, not locked		X	X
Design branching (ability to pursue design alternatives in a temporary environment and later merge changes back into the main design branch)	X (Branching)	X (Revise)	X (Revise or through integration with Windchill ProjectLink)
Ability for users to participate in discussion forums		X	X

Capability	Pro/INTRALINK 3.x	Pro/INTRALINK 8.0	Windchill PDMLink
Ability to automate the process of integrating changes made by different users to a common Pro/ENGINEER model (parts or assemblies)	X		
Working with CAD Data			
Support all Pro/ENGINEER object types and their relationships	X	X	X
Relationship reporting capabilities (for example, BOM membership, family tables, where used, and Pro/ENGINEER relationship reports)	X	X	X
Manage Pro/ENGINEER family tables as separate objects	X	X	X
Managed local working environment (workspace)	X	X	X
Update command to keep users aware of latest changes made by others	X	X	X
Switch between workspaces	X	X	X
Support bidirectional transfer and change of CAD (file-based) attributes	Full Capability	Full Capability	Full Capability
Duplicate (save as) CAD product structures	X (in Workspace)	X (in database)	X (in database)
Configure the display of object and attribute information (saved displays)	X	X	X
Drag and drop	Limited	Extensive	Extensive
Multiple servers connected to one Pro/ENGINEER session		X	X

Capability	Pro/INTRALINK 3.x	Pro/INTRALINK 8.0	Windchill PDMLink
Single integrated user interface		X	X
Automatically number new CAD objects based on a company's part numbering system		X	X
Out-of-the-box integrations with leading third-party CAD authoring tools			X
Undo and redo changes made in a user's workspace	X (Frames and Pro/ENGINEER Undo/Redo)	Limited (Pro/ENGINEER Undo/Redo)	Limited (Pro/ENGINEER Undo/Redo)
External simplified representation report	X		
Enterprise System Integration			
Seamlessly integrate with other legacy business systems with bi-directional information exchange	X	X	X
Standard (out-of-the-box) integrations with leading ERP vendors			X
Visualizing Data			
Basic lightweight 3D object preview from workspace and commonspace for Pro/ENGINEER users	X (From Pro/INTRALINK 3.x client window)	X (Through embedded browser)	X (Through embedded or stand-alone browser)
Basic lightweight 3D object preview from workspace and commonspace for Pro/INTRALINK users	X	X	X
Advanced visualization with markup and annotation capabilities	X (Requires Division ProductView)	X (Requires ProductView)	X (Requires ProductView)

Capability	Pro/INTRALINK 3.x	Pro/INTRALINK 8.0	Windchill PDMLink
Client-side viewable generation		X	X
Support for Distributed Product Development (Performance, Scalability, Replication)			
Checkout and add to workspace as links	X	X	X
Scalable Web-based, three-tier architecture		X	X
Performance sensitivity to network	High	Low	Low
Sharing of data between separate databases	X (Package replication)	X (Server-side import/export)	X (Server-side import/export)
Distributed content storage (vault/content replication) with local download	X	X	X
Replication rules	X (Folders/domains)	X (Folders/domains, object type, object state, viewables)	X (Folders/domains, object type, object state, viewables)
Replication file size threshold		X	X
Replication fault tolerance		X	X
Replication compression		X	X
Distributed content storage (vault/content replication) with local upload		X	X
Automated content replication		X	X
Cross-locale support		X	X
Metadata compression for data transfer between client and server		X	X

Capability	Pro/INTRALINK 3.x	Pro/INTRALINK 8.0	Windchill PDMLink
Multithreaded downloading and uploading, with uploading in background		X	X
Work offline		X	X
System Security			
Domain-based access control (applied to objects in given domain, using users, groups, and roles)	X	X	X
Maturity-based access control (applied to objects based on release level or life cycle state)	X	X	X
Instance-based access control (overrides domain-based access control to grant additional permissions to individual objects)		X	X
Audit reporting capabilities (such as user activity and project activity)		X	X
Client-server communication protocol	SQL*Net	HTTP, HTTPS	HTTP, HTTPS
Network zones (firewalls)		X (optional, from 1-3 firewalls)	X (optional, from 1-3 firewalls)
Authenticate users with standard Web-based authentication		X	X
System Administration and User Interface			
Manage users and groups	X	X	X
Backup and recovery	X	X	X
Purging old versions and iterations	X	X	X
An administrator can set default user behavior	X	X	X

Capability	Pro/INTRALINK 3.x	Pro/INTRALINK 8.0	Windchill PDMLink
Open APIs for customization (for example, triggers)	X	X	X
External LDAP server		X	X
Customize application user interface		X	X
Archive and Restore		X	X
Provide a user-specific home page where users can view current work, tasks, and assignments		X	X

Alternative Techniques

The following table lists capabilities available in Pro/INTRALINK 3.x that do not directly correspond to capabilities in Pro/INTRALINK 8.0. Where applicable, a Pro/INTRALINK 8.0 alternative technique is suggested.

Pro/INTRALINK 3.x Capability	Pro/INTRALINK 8.0 Alternative Technique
Workspace frames	Pro/ENGINEER Wildfire 2.0 Undo and Redo
Workspace duplicate (with Update Partner)	Server-side Save As
Object export from workspace	Server-side export or Pro/ENGINEER File > Backup
Non file-based attributes	File-based attributes (instance-based attributes)
Advanced baseline capabilities	Create baselines during check in as stored configurations
Graphical relationship report	References and Referenced By relationships
User-defined life cycle attributes	May be addressed through customization
Folder-based attributes	Product and Library attributes
Explicit hold in workspace	Download to workspace (without checkout) for implicit hold
Integrate	Manually merge changes
Shared lock	Access control rules and checkout on-the-fly
Briefcase	Clipboard
Branching	Revise to create multiple revisions

Navigating Pro/INTRALINK 8.0

Using the Pro/INTRALINK 8.0 Tabs

When you first open Pro/INTRALINK 8.0, tabs appear at the top of your page. These tabs provide access to different information and functionality. The following sections describe each tab.



Home Tab

The **Home** tab contains information specific to your interaction with Pro/INTRALINK 8.0. Here, you can view your assignments, items that you have checked out, and more. The pages available from the **Home** tab are described below.

Overview

The **Overview** page displays the seven most recent items in each of the following tables:

- **Assignments**
- **Updates**
- **Checked-Out Work**

If a table contains more than seven items, a **View All** link appears in the bottom-left corner of the table, allowing you to view all items. You can also click the link for a table to view only that table and all of the items contained in it. Links to each table are available below the **Home** tab.

Home Product Library

Overview Assignments Updates Checked-Out Work Workspaces Notebook Subscriptions Reports Utilities

Welcome, defaultqaorg Product Library and Project Creator Last Login: Apr 28, 2005, 8:26 AM EDT

Search within my work: Go

▼ Assignments Current View: Open ?



Name Actions Subject State Deadline Done **Assigned** Context

No Items to Display

[View All](#)

▼ Updates Current View: Most Recent ?

All Copy Add to Hot Links

	Name	Number	Actions	State	Last Modified	Version	Context
<input type="checkbox"/>	 68CDMLIBRARY		 See Actions		Apr 27, 2005, 11:16 AM		

[View All](#)

▼ Checked-Out Work Current View: All ?

Copy Add to Hot Links

Name	Number	Actions	State	Last Modified	Version	Context
No Items to Display						

[View All](#)

Assignments

The **Assignments** page, or task list, displays the tasks that are assigned to you as part of a workflow process. A *workflow* is a series of predefined tasks that correspond to a business process in your organization. Depending on your role in these business processes, the workflow engine could deliver tasks that ask you to review, author, or approve product data.

For more information about a task that is assigned to you, click the link in the **Name** column of the table, or select **Details** from the actions list.

The information page displays the information you need to complete the assignment.

After you complete a task, click **Task Complete** on this page. The task is then removed from your **Assignments** table, and the workflow process moves forward.

If an item (such as a part or document) is associated with the assignment, a link to the information about the item appears in the **Subject** column of the table. From this page, you can view all available information for, and perform actions on, the item.

If you need to reassign the task or update the deadline, those options are available from the **Actions** column of the table.

Updates

The **Updates** page lists items that you have recently modified. For example, you may check out a document in order to edit the text, and then check in the document with your corrections. If the document needs additional editing, you can retrieve it from your **Updates** table rather than have to search for the document or locate it in within the folders of the product or library.

Checked-Out Work

The **Checked-Out Work** table lists any items that you currently have checked out.

You must check out a part or document in order to modify it. At the time of checkout, a working copy duplicates the original object file and becomes the copy that you modify. This copy of the item appears in your **Checked-Out Work** table. Checkout locks the original item to prevent change by others.

Once you are finished modifying an item, you can check in the item from this table by clicking **Check In** in the actions list. Your working copy, with all of its attributes and associations, supersedes the present iteration of the item, and the item is removed from your **Checked-Out Work** table.

Workspaces

The **Workspaces** page displays a listing of workspaces, if any, that you created in all products and libraries to which you have access. A workspace provides a useful framework that allows you to work with many CAD documents at the same time.

Selecting **Workspaces** under the **Product** or **Library** tab displays a listing of only the workspaces associated with the context.

Once on the **Workspaces** page, you can create a new workspace, delete an existing workspace, or, by clicking the link in the workspace **Name** column, go to an existing workspace.

Notebook

The Notebook is a collection of links to items and URLs with which you often work. Notebooks display these links you have created and allow you to organize them in folders and subfolders. Your Notebook is similar to Internet Explorer's Favorites or Netscape Navigator's Bookmarks. Because the links are saved in the Pro/INTRALINK 8.0 database, the links in your Notebook can be accessed from anywhere and from any machine. You can also upload documents to your Notebook.

See Communication Tools in Windchill PDMLink of the *Pro/INTRALINK 8.0 and Windchill PDMLink User's Guide* for more information about notebooks.

Subscriptions

A subscription is a request to be notified of certain events concerning documents in which you are interested. For example, if you want to know when Document A is updated, you subscribe to the document and select the **Update** event. Then, any time the document is updated, an e-mail notification is sent to you.

From the **Subscription** page on the **Home** tab, you can view all of your subscriptions and unsubscribe from items.

Tip: Subscriptions are not available for all items. If notifications cannot be sent for an item, the **Subscription** link will not appear on the information page.

See Communication Tools in Windchill PDMLink of the *Pro/INTRALINK 8.0 and Windchill PDMLink User's Guide* for more information about subscriptions.

Reports

The **Reports** page displays a report table that allows you to run the reports across products and libraries in which you are a team member.

Note: Only the items that you created or for which you are the owner are displayed on the page.

Click the name of the report you would like to run in the list. For example, you may want to see a list of your **Overdue Items** or your **Open Work**, relating to your [Assignments](#).

Utilities

The **Utilities** page provides access to items used to change or enhance your interaction with Pro/INTRALINK 8.0. For example, links to [Setting User Preferences](#), security settings, and software downloads appear on this page.

Site and Organization

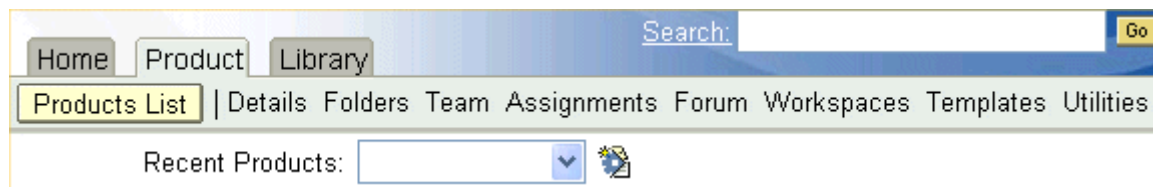
These tabs appear for administrators. For more information, see Chapter 3, [Administration Information](#).

Product Tab

A *product* can be thought of as all the collected information that defines what is built and sold by your company. The product provides the context in which you collaborate to create this information, where only those with defined roles have access to the information.

For more information, see the Managing Products and Product Structures chapter in the *Pro/INTRALINK 8.0 and Windchill PDMLink User's Guide*.

When you click the **Product** tab, the most recently viewed page of the product that you last viewed opens. For example, if the last time you viewed information under the **Product** tab, you viewed the **Folders** page of Product A, that page appears the next time that you click the **Product** tab. To view information for a different product, click the **Products List** link below the **Product** tab and select a product from the list. You can also select a product from the **Recent Products** drop-down list on the top of the page.



Once a product has been selected, you can do the following:

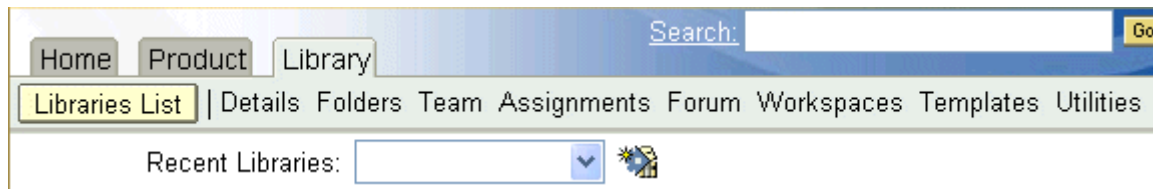
- Search for items in the product using the **Search within this product** field, which is located at the top of any page under the **Product** tab. This returns only those items which match your specified criteria and which exist in the product from which you are searching. Items contained in other products are not returned.
- From the **Details** page, view the attributes for the product and the end items that exist in the product. You can also complete actions from the actions list.
- From the **Folders** page, view the items that reside in the product and complete actions on those items. Use the **Current View** drop-down list in the table to filter the items listed in the table. For example, you can choose to view only documents.
- From the **Team** page, identify the members of the product team who have access to the information displayed in this product and the roles to which they are assigned.
- From the **Forum** page, view and discuss topics that relate to the product. Team members can reply to existing postings or start new discussions. See Communication Tools in Windchill PDMLink of the *Pro/INTRALINK 8.0 and Windchill PDMLink User's Guide* for more information about discussion forums.

- From the **Workspaces** page, users can view or create personal workspaces associated with the product.
- If you have access, a **Templates** page and **Utilities** page may also appear. For more information on these pages, see [About Administration in Pro/INTRALINK 8.0](#).

Library Tab

A *library* can be thought of as a place for storing and providing access to business information, such as documents and other items that are not related to a single product. For example, your company may have a library titled "Design Standards."

When you click on the **Library** tab, the last page of the library that you last viewed opens. For example, if the last time you viewed information under the **Library** tab, you viewed the **Details** page of Library A, that page appears the next time that you click the **Library** tab. To view information for a different library, click the **Libraries List** link below the **Library** tab and select a library. You can also select a library from the **Recent Libraries** drop-down list on the top of the page.



Once a library has been selected, you can do the following:



- Search for items in the library using the **Search within this library** field located at the top of any page under the **Library** tab.
- From the **Details** page, view the attributes that exist for the library. You can also complete actions from the actions list.
- From the **Folders** page, view the items that reside in the library and complete actions on those items. Use the **Current View** drop-down list in the table to choose the items listed in the table. For example, you can view only folders.
- From the **Team** page, view the members of the library who have access to the information displayed in this library.
- From the **Forum** page, view and discuss topics that relate to the library. Team members can reply to existing posting or start new discussions. See Communication Tools in Windchill PDMLink of the *Pro/INTRALINK 8.0 and Windchill PDMLink User's Guide* for more information about discussion forums.

- From the **Workspaces** page, view or create workspaces associated with the library.
- If you have access, a **Templates** page and a **Utilities** page may also appear. For more information on these pages, see Chapter 3, Administration Information.

Using the Header Links

The following links, as well as a **Copy Page** button and a search field, appear in the Windchill header:



Link	Description
Visualization Collection	Displays the Visualization Collection. The collection provides the ability to combine different data sets into one viewable representation for the current browser session. This portal allows you to view and print visual representations of parts and documents in ProductView. Tip: The first time you add an object to the collection, this link appears.
Learn	Displays Windchill tutorials, which walk through procedures for completing Windchill operations.
Help	Displays online help for the tab you are viewing. Tip: To view online help for a particular table, click  in the upper-right corner of the table.
Publications	Displays the Publications page, which provides links to all Windchill manuals.
E-mail Page	Launches a new window that allows you to e-mail the current URL to another user.
Hot Links	Opens the My Current Hot Links folder of your Notebook under the Home tab. Hot links are URLs for the Windchill pages you access most frequently. The Add to Hot Links button  appears throughout Windchill to allow you to save a link to your Hot Links .

Search

The **Search** field allows you to locate Product Data Management (PDM) data that has been created in Pro/INTRALINK 8.0. Enter keywords in the field, and click **Go**.

To view the **Search** page, where you can specify search criteria for specific items, locations, and fields, click the **Search** link to the left of the field.

For more information see the following sections of Searching in Windchill PDMLink, of the *Pro/INTRALINK 8.0 and Windchill PDMLink User's Guide*:

- About Search
- About the Search Page
- About Search Results
- About Wildcards

Tip: When used in conjunction with Pro/INTRALINK 8.0, Pro/ENGINEER Wildfire users can search for objects in the PDM database without leaving Pro/ENGINEER.

Copy Page

The **Copy Page** button copies the URL of the current page to the Windchill clipboard. The URL you have copied can be pasted into any table that accepts links or into a text field that has a **Paste** action associated to it.

Setting User Preferences

To access the **User Preferences** page, click **Preferences** on the **Utilities** page of the **Home** tab.

Pro/INTRALINK 8.0 has six categories of user preferences, so you can define certain aspects of your functionality.

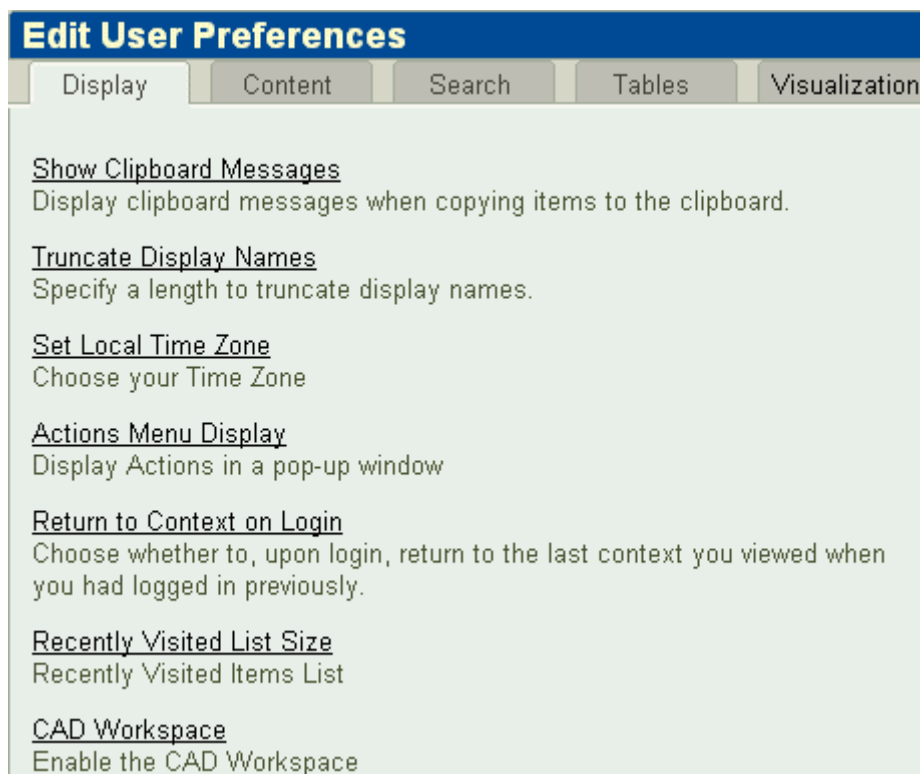
- Display
- Content
- Search
- Tables
- Visualization
- Configuration Specification

Your preferences may differ, depending on the settings at your site.

Tip: Always click **OK** or **Apply** to submit preference information instead of pressing ENTER on your keyboard.

Display Preferences

To customize how certain items of your screen display, click the **Display** tab. A more detailed description of each preference is available when you click on the preference link.



The screenshot shows a web-based interface for editing user preferences. At the top is a blue header bar with the text "Edit User Preferences". Below this header is a row of five tabs: "Display", "Content", "Search", "Tables", and "Visualization". The "Display" tab is currently selected and highlighted. The main content area of the "Display" tab contains several preference items, each with a link and a description:

- [Show Clipboard Messages](#)
Display clipboard messages when copying items to the clipboard.
- [Truncate Display Names](#)
Specify a length to truncate display names.
- [Set Local Time Zone](#)
Choose your Time Zone
- [Actions Menu Display](#)
Display Actions in a pop-up window
- [Return to Context on Login](#)
Choose whether to, upon login, return to the last context you viewed when you had logged in previously.
- [Recently Visited List Size](#)
Recently Visited Items List
- [CAD Workspace](#)
Enable the CAD Workspace

Content Preferences

To customize your document upload and download processes, click the **Content** tab. A more detailed description of each preference is available when you click on the preference link.

The screenshot shows the 'Edit User Preferences' dialog box with the 'Search' tab selected. The dialog has a blue header bar with the title 'Edit User Preferences'. Below the header is a row of five tabs: 'Display', 'Content', 'Search' (which is highlighted), 'Tables', and 'Visualization'. The main area of the dialog is light green and contains several preference items, each with a link and a description:

- Default Local Directory
Choose a default directory for uploading and downloading primary files.
- Download Operation Type
Choose to have primary file opened or saved to disk.
- Content Download Upon Document Checkout
Choose whether primary content file is downloaded when you check out a document.
- File Not Found Behavior
Choose behavior if local file is not found.
- Unchanged File Behavior
Choose behavior if local file has not changed.
- Changed File Behavior
Choose behavior if local file has changed.
- Java Applet File Download Option
Choose whether to use Java applet to download files for editing.
- Java Applet Plug-In Auto Detect Behavior
Choose whether auto detection of a missing Java plug-in will cause a prompt for plug-in installation.
- Compress Contents
Choose to receive compressed data over HTTP.
- Choose Preferred Content Cache Site
Choose Preferred Content Cache Site.

The word 'Search' is printed in bold black text to the right of the dialog box.

Preferences

To customize your search process, click the **Search** tab. A more detailed description of each preference is available when you click on the preference link.

For information on search modes, see Using Search Modes in Search in Windchill PDMLink of the *Pro/INTRALINK 8.0 and Windchill PDMLink User's Guide*.

Edit User Preferences				
Display	Content	Search	Tables	Visualization
<p><u>Table Results Paging</u> Choose the number of table results to display per page. The System default is 15 per page.</p> <p><u>Latest Version Search</u> Search for the latest version of items.</p>				

Table Preferences

To customize how information displays in the tables in Pro/INTRALINK 8.0, click the **Tables** tab. A more detailed description of each preference is available when you click on the preference link.

Edit User Preferences				
Display	Content	Search	Tables	Visualization
<p><u>Overview Table Size</u> Home Tab Number of Rows to Display</p> <p><u>Table Results Paging</u> Choose the number of table results to display per page. The System default is 15 per page.</p>				

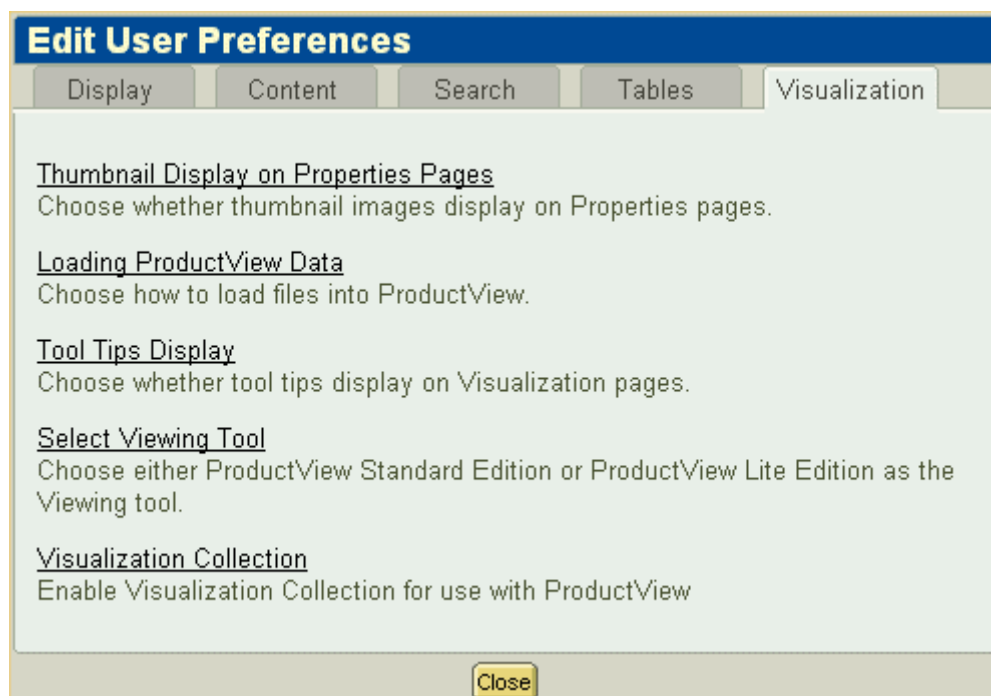
Setting Visualization Preferences

To customize your visualization options, click the **Visualization** tab. A detailed description of each preference is available when you click the preference link.

If you choose to display thumbnails, small images of the items can be viewed from the search results and information pages.

Thumbnails give you a visual image to associate with the details information of an item. You can also launch ProductView by clicking the thumbnail icon; however, displaying thumbnails increases the time needed for pages to load.

Note: You must have ProductView installed in order to customize your visualization options.



Using Special Characters in Pro/INTRALINK 8.0

The following characters have special meaning in HTML and should be avoided when entering information in the fields on pages in Pro/INTRALINK 8.0:

- <
- >
- "
- '
- &

The following actions are not recognized by HTML and should be avoided when entering information in the fields in Pro/INTRALINK 8.0:

- Adding more than one space between letters.
- Pressing ENTER.

The following should not be used in UNIX file names:

- \
- The extension ".LNK" or ".lnk."

Getting Started as an Administrator

The following is a brief comparison of administrative features in Pro/INTRALINK 3.x and Pro/INTRALINK 8.0.

Pro/INTRALINK 3.x

- Access control set per release level per folder for a user or a group of users.
- Access controls are specified for all objects within a folder in a particular release level.
- All objects in the folder have the same release scheme.
- All objects in the folder have the same access policies.

Pro/INTRALINK 8.0

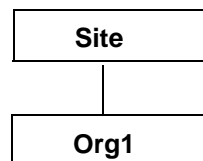
- Data is organized per product or libraries and then broken down into folders.
- Access control policies are specified per object type for each product and library.
- Access control can also be specific to folder within the product and library.
- Life cycle is assigned to a specific object type within a product or library.
- Access control can be specified for an individual object instance in a particular life cycle state.

After Pro/INTRALINK 8.0 is installed and configured (as documented in the *Windchill Installation and Configuration Guide - Windchill*), one administrative user is set up as well as the Site and organization containers.

Your installed Pro/INTRALINK 8.0 environment consists of a set of containers that hold all of the administrative areas (known as domains), rules, and data that make up the context from which Pro/INTRALINK 8.0 users work.

The containers are set up in a hierarchy so that the rules and data created in one container can be available to child containers and the domains in one container can have child domains in a child container. The child domains inherit information from ancestor domains.

Pro/INTRALINK 8.0 has an installed top-level Site container and an organization container that is created when the base data is loaded. For example, if the organization container is named Org1, the following hierarchy applies:



In this example, the Org1 organization container inherits rules and data from the Site container.

Note: In Pro/INTRALINK 8.0, there is only one organization container that is created by loading the Pro/INTRALINK 8.0 base data, as described in the *Windchill Installation and Configuration Guide - Windchill*. In Pro/INTRALINK 8.0, you cannot create additional organization containers.

Before you can get started with administrative activities in Pro/INTRALINK 8.0, you must log on as the Administrator (using the user name defined during the Windchill Services installation, for example, wadmin). This user is a member of the Administrators group and has out-of-the box privileges that give you full control over all Pro/INTRALINK 8.0 objects. As this user, you can establish an organization administrator and select a set of users who are then able to create products and libraries.

You can access Pro/INTRALINK 8.0 using a URL from a Web browser.

Note: The server manager and method server must be running (as well as the Web server and servlet engine) before Pro/INTRALINK 8.0 can be accessed. Starting services is covered in [Administering Pro/INTRALINK 8.0 Services](#) in the Administration Information chapter.

The URL string is formatted as follows:

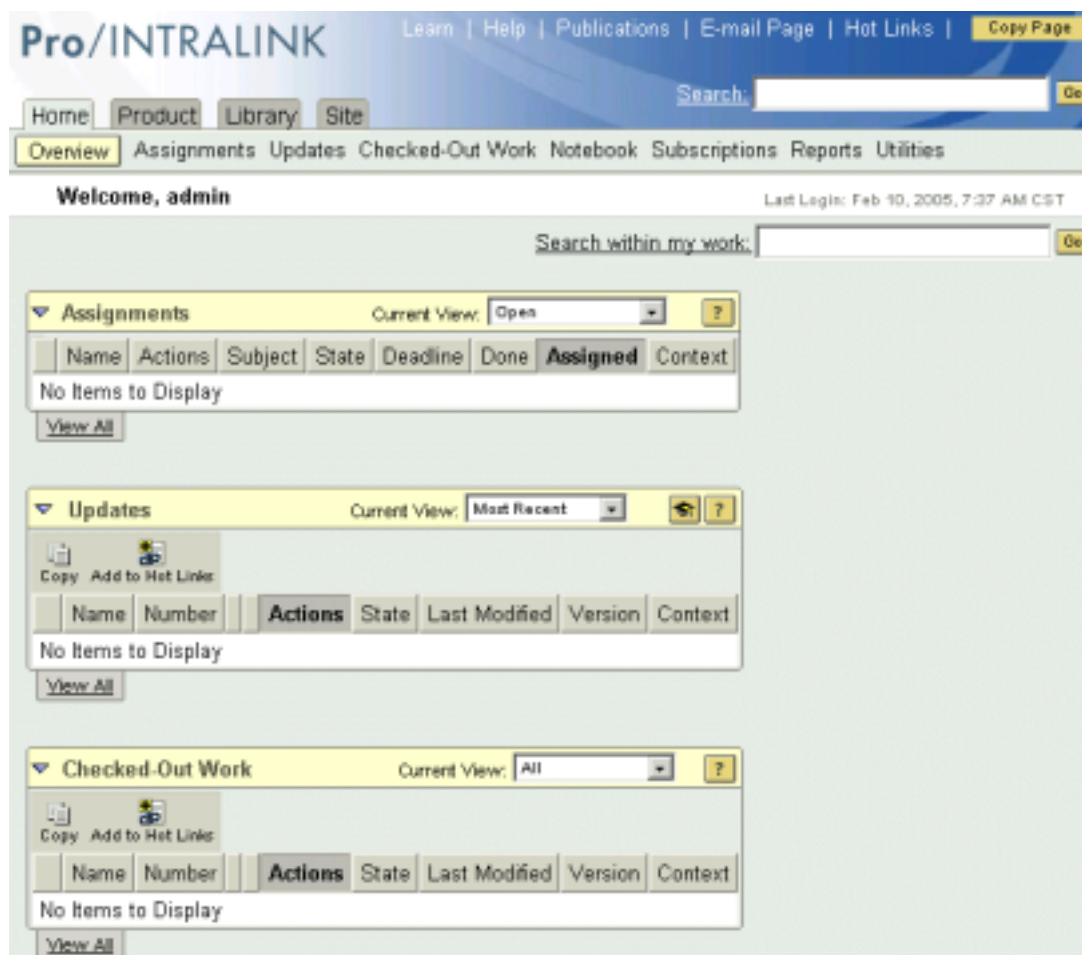
```
http://<hostname>:<port>/<webapp>
```

The required parameters were defined when Pro/INTRALINK 8.0 Info*Engine was installed. You only need to include the port number when the Web server being used is using a port number other than 80 (default). If the Web server is using the default port, then you can enter `http://<hostname>/<webapp>` in your Web browser Address (or Location) text box. For example, if you specified ProI8 for the `<webapp>` parameter, then the following URL entered in the Web browser Address text box will open the Pro/INTRALINK 8.0 home page:

```
http://<hostname>/ProI8
```

Tip: If you are logging on using the same system where Pro/INTRALINK 8.0 is installed, you can use **localhost** as `<hostname>`.

The Pro/INTRALINK 8.0 home page that appears is similar to the following:



The tabs at the top of the window identify the major areas provided in Pro/INTRALINK 8.0:

- From the **Home** tab, users manage their daily work, as described earlier in this chapter.
- From the **Product** tab, users have access to all products to which they are a member, as described earlier in this chapter. If you are a product creator, you can create a product from this tab.
- From the **Library** tab, users have access to all libraries to which they are a member, as described earlier in this chapter. If you are a library creator, you can create a library from this tab.
- From the **Site** tab, site administrators configure and manage the Pro/INTRALINK 8.0 system as a whole. This tab is only visible to site administrators and is the tab from which the initial administration activities are done.

Tip: The **Organization** tab does not appear until you select the organization from the page that displays when you select **Organizations** link on the **Site** tab.

The organization container that is created when the base data is loaded is created using the General (PDM) template. The name of the organization entered during the Windchill Services installation becomes the name of the organization container and the underlying organization object that is created. Additionally, the organization is defined so that the organization can host products and libraries and organization members can search for all users, not just those within their organization. For information about what is set using the General (PDM) template and other organization details, see the Administering Organizations chapter of the *Windchill Business Administrator's Guide*.

By default, the administrative user defined during the installation cannot be the organization administrator. This is because this user is not defined as a member of the organization and the organization administrator must be a member of the organization.

Tip: All members of an organization have the name of the organization set in their directory service user entries. This name is set as the value of the organization attribute ("o", by default). For example, users with the following attribute set are members of the PTC organization:

o=PTC

To establish an organization administrator, click the **Administrators** link on the **Organization** tab and add one or more users as organization administrators to the organization.

Tip: In a production environment, users are typically defined in an enterprise directory that is set up during installation. If you are setting up a test system and do not have a set of users from which to select administrators, you can create a set of test users in the default directory service using the Principal Administrator. The Principal Administrator is available from the **Site** tab. Click the **Utilities** link and then click the **Principal Administrator** link to open the Principal Administrator.

At a minimum, you need to either update the Administrator user so the user is a member of the organization or create another user who can be the organization administrator. This user can then administer the organization and create products and libraries. Additionally, you can add other users as product and library creators. Product and library creators are maintained through the **Creators** link on the **Organization** tab. From the **Organization** tab, click the **Creators** link and then choose the type of creator from the **Current View** drop-down list on the **Creators** table.

After the administrators are established, you can log on as those users and manage your organization or create products and libraries.

For additional information on site, organization, product, and library containers, see the following chapters in the *Windchill Business Administrator's Guide*:

- Administration Overview - for general information
- Administering Containers - for major container concepts
- Administering Organizations - for details on using the **Organization** tab
- Administering the Site - for details using on the **Site** tab
- Administering Products and Libraries - for details on administering Pro/INTRALINK 8.0 products and libraries

The following sections provide some information about products used with Pro/INTRALINK 8.0.

Using Oracle

Like Pro/INTRALINK 3.x, Pro/INTRALINK 8.0 leverages an Oracle database. In order to support different customer needs, PTC offers two versions of Pro/INTRALINK: one that includes a bundled Oracle database, and one that does not. Customers who have purchased the bundled version of Pro/INTRALINK receive their Oracle software from PTC. Customers who purchased the version of Pro/INTRALINK that does not include Oracle must obtain the Oracle software on their own. Customers who purchased the version of Pro/INTRALINK that includes Oracle are provided with an Oracle Software Assistant which will guide you through the installation of the required Oracle software. In either case, see the *Windchill Installation and Configuration Guide - Windchill* for installation details.

For help with managing your Oracle database, see [Managing the Database with Oracle Tools](#) section in the [Administration Information](#) chapter.

Using Visualization Services

If you have purchased ProductView, you can install Visualization Services for your Windchill-based application. These services include ProductView Lite, the thumbnail generator, the thumbnail viewer, and the collaboration agent from within Pro/INTRALINK 8.0. For information about Visualization Services, see the *Windchill Installation and Configuration Guide - Visualization Services*.

2

Understanding New Concepts

This chapter explains new concepts introduced in Pro/INTRALINK 8.0, including management of documents and CAD documents and working with CAD data.

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Tools for Collaborative Product Development

Communication Tools

Many companies face the challenge of working effectively together when working across multiple sites and with other companies. People usually work in several different ways to develop product concepts, update ideas for the team, and communicate these ideas; however, often issues arise when an update is made, but not clearly communicated. Pro/INTRALINK 8.0 provides functionality that overcomes these challenges. For example, you can use Pro/INTRALINK 8.0 in the following ways to communicate clearly with your team:

- Create new iterations of a document and send an e-mail to the team
- Discuss design ideas using a discussion forum
- Keep track of the work you need from other team members by subscribing to changes
- Comment on designs using the markup capabilities in ProductView

For more information, see the following sections of Communication Tools in Windchill PDMLink, *Pro/INTRALINK 8.0 and Pro/INTRALINK 8.0 and Windchill PDMLink User's Guide*:

- Subscriptions
- Discussion Forums

Collaborating in Pro/INTRALINK 8.0

Modifying an Object

In Pro/INTRALINK 3.x, you can *lock* an object using the **Lock** action. In Pro/INTRALINK 8.0, locking an object is an automatic part of the check-out operation.

In Pro/INTRALINK 3.x, you can also set the status of an object to Lock or Intent to Modify. This protects the object from modification by another user. In Pro/INTRALINK 8.0, you can protect the object by checking it out, which keeps a modified version of the object from being checked in by any other user.

In Pro/INTRALINK 3.x, you can use the Integrate functionality to merge changes made by different users to a common Pro/ENGINEER model. However, in Pro/INTRALINK 8.0, the formerly mentioned capabilities efficiently prevent different users from making changes to a common object at the same time.

Update workspace and Pro/ENGINEER session contents

In Pro/INTRALINK 8.0, you can update the workspace and Pro/ENGINEER session so that your view includes the latest modifications others have made to objects you are using. This is accomplished by using the download, update, and

other actions. For more information, see the Keeping Workspace Items Up-to-Date section of the Basic PDM Operations chapter of the *Guide to Using Pro/ENGINEER Wildfire With Windchill*.

Share peer-to-peer visualization sessions

This capability is part of ProductView and the Windchill Visualization Service, which is part of Windchill PDMLink. In Pro/INTRALINK 8.0, customers can add this capability by adding the Division Graphics Server and Division ProductView.

Design Branching

Design branching is the ability to pursue design alternatives in a temporary environment and later merge changes back into the main design branch.

Pro/INTRALINK 3.x supports this capability with specific branching functionality. Pro/INTRALINK 8.0 does not have a formal notion of branching. However, Pro/INTRALINK 8.0 provides users with more flexible revisioning that can be used to support some types of design branching. Unlike Pro/INTRALINK 3.x, when you create a new version in Pro/INTRALINK 8.0, the original version is not locked. For example, after revising an object from A.4 to B.1, a user may continue to work on version A while other users work on version B, given the proper access controls. This is not possible with Pro/INTRALINK 3.x. Another way to support design branching is through the use of Windchill ProjectLink and Windchill PDMLink.

Managing Documents

Understanding Document Management

The document management functions allow you to create, view, modify, and manage documents.

A *document* is a database object that can be used to store and manage non-CAD files, such as Microsoft Word and Microsoft Excel documents.

Within Pro/INTRALINK 8.0, documents reside in the folders of a specific product or library. You can perform document actions from the **Folders** page in the product or library or from the pages available from the **Home** tab. A list of actions is available from the **Actions** column, or icons may be available in the toolbar of the table. To view the attributes of a document and perform actions on the document, select **Details** and the document information page appears.

The online help available on the information pages gives complete descriptions of the attributes, links, and tables shown as well as the actions that can be performed. Additionally, your site may have created custom attributes that appear with the details.

For more information about document management, see the following sections of the Chapter 4, Managing Documents, of the *Pro/INTRALINK 8.0 and Windchill PDMLink User's Guide*:

- Creating Documents
- Viewing Documents
- Associating Files and Documents
- Modifying Documents
- Options for Downloading Documents

Managing Documents in Pro/INTRALINK 8.0

Store and track versions of documents

In Pro/INTRALINK 3.x unique objects are assigned a *revision* and *version* (N.n). The default revision sequence is 1,2,3,...n. This sequence can be customized. The version sequence is always 1,2,3,...n. An object's revision is changed using the **Set Revision** action. Pro/INTRALINK 3.x automatically increments the version of an object each time the object is checked in.

In Pro/INTRALINK 8.0, unique objects are assigned a *version* and *iteration* (M.m). The default version sequence is A,B,C,... This sequence can be customized. The iteration sequence is always 1,2,3,...n. An object's version is changed using the **Revise** action. Pro/INTRALINK 8.0 automatically increments the iteration of an object each time the object is checked in.

Manage and track standard and user-defined attributes

Both Pro/INTRALINK 8.0 and Pro/INTRALINK 3.x support standard system-defined attributes. These systems also provide the ability to specify user-defined attributes. Pro/INTRALINK 8.0 provides flexibility for defining attribute types. . However, Pro/INTRALINK 8.0 does not support the following attribute types:

- Non-file based attributes
- Folder-based attributes
- Life cycle attributes

Define rules to control access to objects

Pro/INTRALINK 3.x access controls are defined for users and/or groups on folders and release levels. Access controls apply a particular role for a particular user or group at a particular release level.

Pro/INTRALINK 8.0 access controls are based on domain, object type, location (including folder), team, life cycle state, and role.

For more information, see [Administering Access Control](#) in Chapter 3, [Administration Information](#).

Track and report object history (Audit Trail)

Both Pro/INTRALINK 3.x and Pro/INTRALINK 8.0 provide full version and iteration history capabilities. Pro/INTRALINK 3.x also provides an audit trail report that includes other object changes, such as renames, deletions, and promotions. Pro/INTRALINK 8.0 provides administrators with the ability to configure additional auditing capabilities.

Provide product information access with a Web browser

Pro/INTRALINK 3.x uses a Java client that requires separate installation on each desktop.

Pro/INTRALINK 8.0 leverages an intuitive Web browser-based user interface and Web surfing style navigation that is ideal for broad enterprise access and can be used through the integrated Pro/ENGINEER Wildfire browser or a standalone HTML browser.

Associate documents

Pro/INTRALINK 3.x provides user-defined relationships that allow users to manually associate one object to another.

Pro/INTRALINK 8.0 supports the concept of *secondary content*. This allows users to store multiple content files with a single CAD document. The native CAD file is called *primary content*. Any additional content, such as specification documents or IGES files are attached as secondary content.

Managing CAD Structures

The database of Pro/INTRALINK 8.0 is structured such that all information uniquely defining a product is collected in one logical location. A person with administrative privileges, creates this common location called a product. One of the implications of creating products is the capability to specify which users will be able to access and/or modify product information. For example, if you create a CAD document within the location of a product (which is also referred to as the product context) only users who have access privileges to that product can view or modify the document.

Pro/INTRALINK 8.0 assumes each product will have at least one top-level assembly that represents a unit of product functionality that is sold, assembled, and delivered to the customer. The complete details of the structure of this top-level assembly can be obtained from the CAD document structure (Model Structure Report).

Create and modify CAD product structures

Pro/INTRALINK 3.x CAD structure modification tools are designed to work with Pro/ENGINEER CAD objects. These tools provide the ability to duplicate existing Pro/ENGINEER structures and to create new Pro/ENGINEER structures, including unplaced memberships for Pro/ENGINEER assemblies that are not geometrically constrained.

Pro/INTRALINK 8.0 includes the ability to duplicate Pro/ENGINEER CAD structures using a **Save As** action that is executed on the Pro/INTRALINK 8.0 server.

Check-out and download specific configurations for use in a CAD application

Pro/INTRALINK 3.x provides custom check-out configurations, as stored configurations, and named baselines.

Pro/INTRALINK 8.0 provides configuration specification capabilities, as stored configurations, and named baselines.

Configure part numbering and versioning schemes

Both Pro/INTRALINK 3.x and Pro/INTRALINK 8.0 systems provide the ability to configure versioning schemes. Pro/INTRALINK 8.0 also allows customers to tailor these schemes based on the object's life cycle maturity. Additionally, Pro/INTRALINK 8.0 provides the ability to configure automatic part numbering.

Working with CAD Data

About CAD Documents

A document is a database object containing files in application format. CAD documents are Windchill objects that are used to store and manage CAD information files (the output of CAD authoring applications).

A CAD document typically has content and attributes that are relevant to the external application only, such as Pro/ENGINEER files (3D models, drawings, viewable images, analyses, and so on). It can contain both primary content (for example, a 3D CAD model file) and secondary content (for example, an IGES file).

For more information about CAD documents, see the CAD Document section of the Introduction to Using Windchill with Pro/ENGINEER chapter of the *Guide to Using Pro/ENGINEER Wildfire with Windchill*.

About the Workspace

The workspace is a private area where you can manage multiple objects and perform basic PDM operations. In addition to managing a users locally modified data, the workspace is also designed to facilitate concurrent engineering. The workspace tracks which objects have been modified locally, as well as by other users, and provides tools to enable a user to update their Pro/ENGINEER session with the latest data from the commonspace. In Pro/INTRALINK 3.x, the Workspace completely resides on the client machine. In Pro/INTRALINK 8.0, there are two components to the workspace: the workspace cache and the serverside workspace. The *workspace cache* resides on the local client machine, and the *serverside workspace* resides in the user's personal cabinet on the server. This enhanced workspace architecture allows users to more easily access work-in-

progress data from different workstations and allows system administrators to back-up work-in-progress data that has not been checked into the database. As in Pro/INTRALINK 3.x, the workspace maintains knowledge of what CAD files and objects are on your local machine and what you have downloaded in use in a CAD application.

For more information about workspaces, please see the Workspaces and the Commonsense section in the Introduction to Using Windchill with Pro/ENGINEER chapter of the *Guide to Using Pro/ENGINEER Wildfire with Windchill*.

Working with CAD Data in Pro/INTRALINK 8.0

Relationship Reporting

Pro/INTRALINK 3.x provides a comprehensive set of reporting tools that can report on Pro/ENGINEER objects and relationships, such as model structure, family tables, where-used, and Pro/ENGINEER relationships.

Like Pro/INTRALINK 3.x, Pro/INTRALINK 8.0 continues to offer reports for model relationships (used by and uses), family tables, and model structures. In addition to these reports, Pro/INTRALINK 8.0 introduces new reports for rename history, save as history, and location history. Furthermore, expanded capabilities are provided for difference reporting and creating custom reports.

Automatically number new CAD objects based on a company's part numbering system

Pro/INTRALINK 8.0 provides out-of-the-box autonumbering capabilities. This provides the ability to automatically assign a new part number to new CAD objects and enterprise objects in the database.

For more administrator information, see the Managing CAD Document and WTPart Naming and Numbering chapter of the *Customizing and Administrating Pro/ENGINEER Wildfire* guide.

Visualizing Data in Pro/INTRALINK 8.0

About Visualization

Both Pro/INTRALINK 3.x and Pro/INTRALINK 8.0 include built-in Pro/ENGINEER previewing capabilities. With Pro/INTRALINK 3.x, these capabilities are accessible from the Pro/INTRALINK workspace and commonsense browser. With Pro/INTRALINK 8.0, dynamic previewing of Pro/ENGINEER models is provided in the Pro/ENGINEER Wildfire 2.0 embedded browser.

Optional advanced visualization capabilities can be added through the use of ProductView and include the following:

- Rich viewing and markup of models, drawings, and images

- Optional legacy documents and PDF viewing and markup
- Pro/ENGINEER Wildfire 2.0 annotation feature support
- Real-time collaboration between multiple ProductView users
- Advanced 3D model interrogation from accurate, yet compact, geometry
- Optional Realizer module provides interference checking, animation creation, and interactive mechanisms
- Optional Composer module provides interactive creation and editing of assembly sequences

Customers upgrading from Pro/INTRALINK 3.x and the Division Graphics server to Pro/INTRALINK 8.0 will see the following improvements:

- 3D thumbnail viewing
- Server-enforced watermarking
- Automatic viewable replication
- Client-side viewable creation
- Improved accuracy for metadata synchronization
- Publishing priority control
- Improved system architecture
- Single database
- Improved scalability
- More robust infrastructure
- Improved administration tools
- More efficient publishing of large assemblies

Pro/INTRALINK 8.0 provides the following capabilities out of the box:

- 3D object preview from information pages in the Pro/ENGINEER Wildfire embedded browser
- Preview from Pro/ENGINEER using the **File > Open** menu selection

These basic capabilities are essentially the same as those provided with Pro/INTRALINK 3.x.

For more information about ProductView Lite Edition, see the following sections of Chapter 9, Visualizing Data in Windchill, of the *Pro/INTRALINK 8.0 and Windchill PDMLink User's Guide*:

- Accessing Visualization
- ProductView Features

- Publishing Visualization Data
- Setting Preferences

If ProductView Standard Edition has been purchased, additional documentation is provided upon installation of the tool.

Managing Life Cycles

Like Pro/INTRALINK 3.x, Pro/INTRALINK 8.0 includes life cycle management tools (known as Release Levels and Release Procedures in Pro/INTRALINK 3.x) to define and advance the maturity of a design. Moreover, Pro/INTRALINK 8.0 adds configuration rules that provide greater flexibility and control over how design content progresses and is managed throughout all phases of the product development life cycle. At each phase of the life cycle, different access control rules and different versioning schemes can be enforced to provide precise control over who has access to the data and how revisions are tracked.

These capabilities provide many important benefits, including:

End-user benefits

- Task notification integrated with corporate e-mail
- Flexible additions to approval groups
- Web-based form for easy access
- Viewable access from promotion request for non-Pro/ENGINEER users (with ProductView option)

Administrative benefits

- More flexible life cycle (release scheme) definition
- More flexible promotion criteria
- Predefined rules for Set State behavior
- Predefined rules for Revise behavior
- Multiple version number schemes

Pro/INTRALINK 8.0 provides a variety of business processes that can be used to mature different types of product development deliverables. For detailed information, see the Managing the Life Cycle of Items chapter of the *Pro/INTRALINK 8.0 and Windchill PDMLink User's Guide*.

- Revise Documents -- Enables you to create a new version of the item. Transition rules can be set up to control the life cycle state of the new version based on the state of the version being revised.
- Set State -- Enables you to informally set the life cycle state of an item. Depending on the transition rules, this action may or may not be available.

- Promotion Request -- Enables you to set the state of one or more items to a new life cycle state as part of a review process. Depending on the transition rules, this action may or may not be available.

For more information on creating life cycles or setting life cycle transition rules, see the [About Administration in Pro/INTRALINK 8.0](#) later in this guide.

Managing Context Teams

A context team is a list of the members of a product or library context. All members of the context can view the context team.

Team members are assigned roles within the context. A context manager role is automatically assigned to the creator of the context; however, the creator can assign the role to other team members. The context manager roles available are as follows:

- Product context -- Product Manager
- Library context -- Library Manager

If you are the context manager or the administrator of the organization where the context resides, you can modify the team from the **Team** page by adding and removing roles, users, and groups. You can define a team using any of the roles that are predefined for your organization or for your context, or you can define new roles that are specific to a context. Then you can add members to one or more roles in the team. Users may have different roles in each context in which they are participants. In one context, a user can be the context manager while in another context, the user can be a member.

For more information about roles and groups, see the online help available from the **Team** page.

The team table information can be displayed differently using the available views from the **Current View** drop-down list.

- Members -- Displays the users and groups invited as team members to participate in a team.
- Members By Role -- Displays the team information organized by role with assigned team members listed under the roles. You can expand and collapse the different roles to view certain information and hide other details.
- All People -- Displays the users in the team with the groups expanded to reveal the names of any group participants. If no groups are a part of the team, this view displays the same information as the Members view.

For more information, see the Managing Teams chapter of the *Pro/INTRALINK 8.0 and Windchill PDMLink User's Guide* and the *Windchill Business Administrator's Guide*.

3

Administration Information

This chapter provides information for administrators of Pro/INTRALINK 8.0, including configuring your environment and using administrative utilities.

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About Administration in Pro/INTRALINK 8.0

Most of the information regarding administration of Pro/INTRALINK 8.0 is contained in the *Windchill Business Administrator's Guide*. For more information about improved security and enhanced reporting, see the *Windchill System Administrator's Guide*. However, these guides are written for administrators of all Windchill solutions and contain information regarding Windchill Foundation & PDM, Windchill ProjectLink, and Windchill PDMLink. Only the general information and the information specific to Windchill PDMLink is relevant to Pro/INTRALINK 8.0.

Understanding Administration in Pro/INTRALINK 8.0

The following sections give you some general information about the administration capabilities in Pro/INTRALINK 8.0.

- Ability to seamlessly integrate with other legacy business systems with bidirectional information exchange - Customers can integrate Windchill PDMLink with other non-standard systems using Windchill Info*Engine adapters. Customers can integrate Pro/INTRALINK 8.0 with other enterprise systems using the Pro/INTRALINK Toolkit.
- Scalable Web-based, three-tier architecture - Pro/INTRALINK 8.0 uses a modern Web-based, three-tier architecture software built using Web technology, Web-delivered Java and HTML end-user interface, middle-tier server logic and workspace logic, and Oracle database and external file storage back-end server components.
- Ability to distribute storage (vault/content replication) securely with guaranteed delivery - Pro/INTRALINK 3.x, Pro/INTRALINK 8.0, and Windchill PDMLink support distributed storage. Pro/INTRALINK 3.x, however, does not support guaranteed delivery; furthermore, Pro/INTRALINK 3.x replication does not support HTTP or HTTPS. This is only available to Pro/INTRALINK 8.0 and Windchill PDMLink multi-site customers.
- Support check-in to distributed storage (local check-in) - Pro/INTRALINK 8.0 content replication includes a Content Cache Server that supports check-in of content files to replicated file vaults. This provides significant performance benefits for users on a wide area network. This is only available to Pro/INTRALINK 8.0 multisite customers.
- Automated sharing of data between separate databases - The multisite version of Pro/INTRALINK 3.x provides Package Replication capabilities that can be used to partially automate the sharing of library data between different Pro/INTRALINK Commonsplaces. Similarly, the multi-site version of Pro/INTRALINK 8.0 and Windchill 8.0 supports import and export capabilities that can be used to share library data between separate Pro/INTRALINK 8.0 or Windchill 8.0 databases.

- Efficiently manage users and groups - Pro/INTRALINK 3.x does not support LDAP; however, Pro/INTRALINK 8.0 and Windchill PDMLink do support LDAP.

You can create and manage users in the Aphelion LDAP directory bundled with Pro/INTRALINK 8.0 or you can configure Pro/INTRALINK 8.0 to use an enterprise directory service that you maintain outside of Pro/INTRALINK 8.0. Aphelion is installed and configured as part of the process of installing Pro/INTRALINK 8.0. For the details on how to manually configure an existing enterprise directory service, see the *Windchill Installation and Configuration Guide*.

Pro/INTRALINK 8.0 uses the Aphelion directory to store group information for all of the groups you can create in Pro/INTRALINK 8.0.

- Ability to deploy the system in a highly secure, redundant configuration - Pro/INTRALINK 8.0 can be configured with one or more firewalls and a reverse proxy. Furthermore, Pro/INTRALINK 8.0 supports single sign-on and provides the ability to encrypt database content.
- Ability to transport data in an encrypted format - Pro/INTRALINK 8.0 provides the ability to:
 - Comply with US and international encryption laws and standards
 - Activate SSL with the HTTPS protocol to encrypt sensitive Web traffic
 - Use 128 bit encryption keys with SSL encryption
 - Store passwords in an encrypted format
- Ability to withstand outside attacks - Pro/INTRALINK 8.0 can be configured to prevent:
 - Client side scripting
 - SQL insertion attacks
 - Buffer overflow
 - Packet sniffing

Pro/INTRALINK 8.0 can also be integrated with intrusion detection software.

Archiving and Purging in Pro/INTRALINK 8.0

In the 8.0 release, Pro/INTRALINK allows a search for archives if Windchill Archive is installed. This search can be made by archive name or it may be based on archived objects. The installation of Windchill Archive explained in the *Windchill Archive Administrator's Guide* is valid for Pro/INTRALINK 8.0.

Pro/INTRALINK 3.x has flexible purging tools that can be used to remove unwanted versions and iterations of database objects. Pro/INTRALINK 8.0 also

provides purging capabilities and the ability to authenticate users with standard Web-based authentication, SecurID, Verisign, and digital certificates.

Managing the Database with Oracle Tools

Certain database administration functions require the direct use of Oracle tools. The following table lists some key functions, and provides for each function a reference to the Oracle documentation that covers it. For your convenience, copies of the referenced Oracle documentation are available online at:

<http://www.ptc.com/appserver/cs/doc/refdoc.jsp>

Database Administration Function	Oracle Documentation
Database startup	<i>Oracle 9i Database Administrator's Guide</i> , Chapter 4, Starting Up and Shutting Down
Database shutdown	<i>Oracle 9i Database Administrator's Guide</i> , Chapter 4, Starting Up and Shutting Down
Database export	<i>Oracle 9i Database Utilities</i> , Chapter 1, Export
Database import	<i>Oracle 9i Database Utilities</i> , Chapter 2, Import
Database backup/restore	Use the export/import utilities
Changing database parameters	<i>Oracle 9i Database Administrator's Guide</i> , Chapter 2, Creating an Oracle Database
Resizing datafiles	<i>Oracle 9i Database Administrator's Guide</i> , Chapter 12, Managing Datafiles

Configuring Your Pro/INTRALINK 8.0 Environment

As described in the [Getting Started with Pro/INTRALINK 8.0](#) chapter, your Pro/INTRALINK 8.0 system consists of the Site and organization containers, and any number of product and library containers. The Site and organization containers are created during the installation process; users who have the correct set of privileges can create product and library containers.

After containers are created and users become team members, the framework established is called the *context* from which the users work. In many instances, the context includes the contents of a specific container and the domains, rules, and data available from ancestor containers. For example, if a user entering Pro/INTRALINK 8.0 navigates to a folder within the Bike Design product and creates a new document, that document is managed in the context of the Bike Design product. Persons with access to the Bike Design product may automatically have the right to see and modify the new document.

Each context provides the following:

- The context structure, which includes the default domains and folders.
- Context participation for Pro/INTRALINK 8.0, which includes the available roles, teams, and groups.
- Default access policies.
- Data types and object initialization rules.
- Default life cycle, workflow, context, team, and report templates.

The base data that is loaded during the installation process creates the out-of-the-box templates for containers, workflows, life cycles, teams, and reports, and associates them with the System domain that is in the Site container. These templates are then available to descendent containers where appropriate.

To provide a consistent Pro/INTRALINK 8.0 environment, PTC recommends that you keep most of the basic system structure and rules the same across all containers. To do this, the basic structure and rules need to be set in the Site container and then not changed by lower-level containers. For details on what is set for the Site container and for more information about containers, see the following chapters in the *Windchill Business Administrator's Guide*:

- Administration Overview
- Administering Containers
- Administering the Site

When you create a product or library, you must select a template (which is then used to create the product or library container). The product and library templates set additional folders (in some cases) and provide additional roles and corresponding access policies for the roles. Using templates for these purposes

makes it easy to have a different set of roles and corresponding access policies for the roles in each product and library.

Additionally, the product and library templates can set object initialization rules for specific data types that establish the following:

- Numbering and versioning scheme to be used for parts, documents, and CAD documents
- Default life cycle, workflow, and team templates for parts, documents, and CAD documents

Setting these items in a product or library template allows you a lot of flexibility; but, depending on your situation, it could produce unwanted results. PTC recommends that you determine the numbering and versioning scheme you want to use for all products and libraries, and establish which life cycle, workflow, and team templates you want to use. Then set these in the Site container rather than in a product or library template.

PTC provides a set of product and library templates that you can use while testing your Pro/INTRALINK 8.0 system. For the details on what is set in each template, see the Administering Products and Libraries chapter in the *Windchill Business Administrator's Guide*.

For most Pro/INTRALINK 8.0 environments, PTC recommends that you test using the Product Design template. Besides setting up a common set of roles used in the product design process, it establishes default life cycle templates that follow the one phase and two phase development cycles. Additionally, the Product Design template sets the versioning scheme to the out-of-the-box, state-based versioning scheme. This scheme works with the Life Cycle Administrator **Version Series** drop-down list and is used in the One Phase Development and Two Phase Development out-of-the-box life cycle templates.

After completing your testing, determine the numbering and versioning schemes, and the default life cycle, workflow, and team templates you want to use on your system and set those items in the Site container (if they are not the defaults already set there) using the Object Initialization Rules administrator from the **Site Utilities** page. For information about using the Object Initialization Rules administrator, see the Administering Containers chapter in the *Windchill Business Administrator's Guide*.

Tip: To always use a rule set in the Site container (and, therefore, not use rules set in product or library containers), you can specify the following AttrValue attribute on the XML rule set in the Site container:

```
final="true"
```

For example, the following XML code sets the default folder to "Default" for documents and allows no child container to modify this default:

```
<AttributeValues objType="wt.doc.WTDocument">
```

```
<AttrValue id="folder.id"
algorithm="com.ptc.core.foundation.folder.server.impl.FolderPathAttributeAlgorithm"
final="true">

    <Arg>/Default</Arg>

</AttrValue>
</AttributeValues>
```

For additional information about specifying the XML code used as object initialization rules, see the Object Initialization rules help.

Defining Document Types and Adding User-Defined Attributes to Objects

The Type Manager allows you to create new subtypes of documents and CAD documents (both of which are modeled types) and types you have created with the Type Manager (soft types). In addition, you can add new attributes to and set constraints on the newly created soft types. For conceptual information about types and the runtime typing capability, see the chapter on Using Types and the Type Manager in the *Windchill Business Administrator's Guide*.

You can access the Type Manager from the **Utilities** pages that are under the **Site** and **Organization** tabs. The **Type Manager** link from the **Site** tab provides you (as the system administrator) with unrestricted access to all types. The link from the **Organization** tab provides access to only those types that are in the organization context that is active when you launch the Type Manager.

Administering the Numbering of Documents and CAD Documents

Numbering schemes control how numbers are generated for documents and CAD documents. Each object class has its own numbering scheme.

A rules load file sets the initial numbering rules for documents and CAD documents. The loaded numbering schemes for parts, documents, and CAD documents are simple Oracle sequences that have been loaded into the Windchill database. Each starts at 1 and increments by 1.

You can view and update the rules that are being used from the Object Initialization Rules table using the Object Initialization Rules Administrator. For details on assessing the Object Initialization Rules Administrator, see the *Windchill Business Administrator's Guide*.

Administering Teams and Roles

You can establish product and library teams (known as context teams) by clicking the **Team** link from the **Product** or **Library** tab to access the **Team** table. From this table, you can administer a product or library team.

Tip: Instead of adding individual users to the roles that are established in a team, you can define groups of users and then add the groups to the roles. Often groups can be established at the organization level using the **Groups** link from the **Organization** tab. Then these groups can be added as members under specific roles in the team. Using this method provides easier maintenance when updating teams when there are personnel changes in your organization. For additional information, see Administering Teams in the Administering Product and Libraries chapter of the *Windchill Business Administrator's Guide*.

Teams and team templates are used throughout Pro/INTRALINK 8.0. For more information, see the chapter Administering Teams and Roles in the *Windchill*

Business Administrator's Guide. Although you can add participants to a team directly through the team template, consider managing the participants through the context teams you establish from the **Teams** link available on the **Product** and **Library** tabs.

Team and team templates make it possible to define a smaller number of life cycles, since the life cycle roles can be mapped to team roles, rather than to specific users and groups. For more information about life cycles, see the chapter Administering Life Cycles in the *Windchill Business Administrator's Guide*.

Administering Access Control

As a Pro/INTRALINK 8.0 administrator, you must ensure that only the appropriate principals have access to objects. These decisions are expressed as access control rules governing domains. Defining these rules determines the types of iterations principals can have with objects of a specific object type and a specific life cycle state.

For example, you can create a rule that gives the Publication group permission to modify objects of type CAD Document when they are in the Under Review state of their life cycle. Together, such rules form an access control policy for the domain. Subsequently, access control lists (ACLs) are derived from the policy for a domain and the policies of all its ancestor domains to enforce your access decisions.

Access control rules are hierarchical. The default set of access control rules is set in the Site container and these rules can be superseded or additional rules set through the organization container and then also through the product or library container. At the product and library level, the rules set are determined by the template that you select when you create the product or library. For the details on what is set in the default rules established through the site, organization and product or library, see the out-of-the-box rules sections in the *Windchill Business Administrator's Guide*.

When users are viewing the attributes of an object where some of the attributes reference access controlled objects, such as principals, then whether the user sees the value of the attributes is determined by whether the user has Read permission for the referenced objects. Typically, when a user does not have Read permission for a referenced object, the field shows **(Secured Information)** instead of the attribute value. For example, assume that a user displays information about a product. If the user displaying the product information does not have Read permission for the user who created the product, then the name of the user will not appear. Instead of the name, the user sees **(Secured Information)**.

For more information, including strategies for developing useful roles, see the Administering Access Control chapter of the *Windchill Business Administrator's Guide*.

Administering Workflows and Life Cycles

Workflow Processes

Pro/INTRALINK 8.0 does not include the ability to create or modify workflows. You do have some out-of-the-box workflows available.

Life Cycle

You can access the Life Cycle Administrator by clicking the **Life Cycle Administrator** link on the **Utilities** pages that are under the **Site**, **Organization**, **Product**, and **Library** tabs. The **Life Cycle Administrator** link from the **Site** tab provides you (as the site administrator) with unrestricted access to all life cycles. The link from the **Organization** tab provides access to only those types that are in the organization context that is active when you launch the Life Cycle Administrator. The link from the **Product** and **Library** tabs provides access to only those types that are in the context that is active when you launch the Life Cycle Administrator.

From the **Product** and **Library** tabs, the Life Cycle Administrator shows all life cycle templates from that context, the organization context, and the site context. From the **Organization** tab, you see life cycle templates from the organization context and the site context. From the **Site** tab, you see only site-level life cycle templates.

For more information, see the chapter Administering Life Cycles in the *Windchill Business Administrator's Guide*.

Life Cycle/Release Schemes Comparison

Capabilities	Pro/INTRALINK 3.x	Pro/INTRALINK 8.0
Administrative		
Definition	By folder only	More options (item type, subtypes, product or library)
Promotion criteria	By folder and release level	More options (state, item type, subtypes, product or library, and multiple process options)
Set state behavior	Manual	Predefined rules
Revise behavior	Manual	Predefined rules
Version number scheme	One	Multiple options (item type and life cycle state)

Capabilities	Pro/INTRALINK 3.x	Pro/INTRALINK 8.0
End User		
Set state	Yes	Yes
Promotion Process	Yes	Yes
Configuration options	Yes	Yes
Automatic viewable	No	With Visualization option
Task notification	Only in Pro/INTRALINK	Integrated with corporate e-mail
Approval teams	Fixed Approval groups	Flexible additions to Approval groups
Review form	Only in Pro/INTRALINK	Easy to use/ Web-based
Traceable baseline	Yes	Yes
Full text searchable	No	Yes

Using Life Cycles for Promotion Requests

Pro/INTRALINK 8.0 and Windchill PDMLink provide two out-of-the-box promotion life cycles for promoting items, such as documents and CAD documents: One Phase Development and Two Phase Development. PTC recommends using the One Phase Development life cycle for CAD documents in Pro/INTRALINK 8.0. The Two Phase Development life cycle should be used only for Windchill PDMLink.

Administering Pro/INTRALINK 8.0 Services

To run Pro/INTRALINK 8.0, you must have the following third-party products running:

- A Web server -- if you are using Apache as your Web server, see the Starting and Stopping Apache section in the *Windchill Info*Engine Installation and Configuration Guide* for details.
- A servlet engine -- if you are using Tomcat as your servlet engine, see the Starting and Stopping Tomcat section in the *Windchill Info*Engine Installation and Configuration Guide* for details.
- The Aphelion directory -- see the Starting and Stopping the Aphelion Directory chapter in the *Windchill Info*Engine Installation and Configuration Guide* for details.

You can start and stop the Pro/INTRALINK 8.0 sever manager and method server by using one of the following:

- On Windows, use a Windows shortcut.

If the shortcuts were created when Info*Engine and Windchill Services were installed, you can use a shortcut to start the Windchill method server and the windchill shell.

Shortcuts can be created in the Windows **Start** menu, on the desktop, and in the Quick Launch Bar. For additional details, see the *Windchill Installation and Configuration Guide - Windchill*.

- To start the servers, enter the windchill start command from a windchill shell; to stop the method servers, enter windchill stop.

For example, to start the servers, enter the following from a command line prompt:

```
windchill shell
```

The windchill shell brings up a new command shell, from the parent shell that is setup for the Windchill environment. This includes setting all environment variables needed for Pro/INTRALINK 8.0. In the new window, enter:

```
windchill start
```

- When you are logged on as the Administrator, you can use the System Configurator to start and stop method servers.

When the server manager is running, you can access the System Configurator from the **Site Utilities** page.

When your server manager is down, you can access the System Configurator Server Status page by entering the following URL in your Web browser:

```
http://<host>/<webApp>wtcore/jsp/wt/sysadm/SystemConfigurator.jsp
```

where *<host>* is the host system (and port, if you are not using the default port of 80) where Windchill is installed and *<webApp>* is the Web application name defined for Windchill (the default is Windchill).

From the **Server Status** page, you can then start or stop the server manager, start or stop individual method servers, and check the status of all servers.

For additional information about using the Windchill commands or the System Configurator, see the *Windchill System Administrator's Guide*.

4

Customization Information

Topic	Page
Customizing Pro/INTRALINK 8.0	4-2

Customizing Pro/INTRALINK 8.0

Pro/INTRALINK 8.0 provides comparable capabilities to the Pro/INTRALINK 3.x platform in all respects, including customization; however, additional licenses may be required for some customization capabilities.

With Pro/INTRALINK 8.0 and in support of specific business processes, customers can create many types of applications including:

- Creating server side triggers and event handlers by implementing Windchill services and listeners
- Integrating to an external change management application via appropriate Windchill Info*Engine adapters
- Integrating to a ERP/MRP system via appropriate Windchill Info*Engine adapters (excluding the Windchill ESI Module)
- Creating new user interfaces by extending or configuring the Pro/INTRALINK 8.0 user interface
- Creating composite applications that combine data from Pro/INTRALINK 8.0 and other applications

While the entire Windchill data model and APIs are included in the Pro/INTRALINK 8.0 package, customizations that expose features of Windchill PDMLink not already in Pro/INTRALINK 8.0 are not allowed or supported. These include applications that leverage the following Windchill business objects and capabilities:

- Parts, products, product instances, and part views
- Change Management
- Integration to ERP or other enterprise systems through the Windchill ESI module
- Workflow engine and workflow applications
- Extensions to the Pro/INTRALINK 8.0 data model. That is, it will not be permissible to add tables to the Pro/INTRALINK 8.0 Oracle Schema.

The reason for not allowing such customizations is that PTC believes that it will be significantly more economical for customers to acquire these capabilities from PTC than build them themselves. For such applications, customers are encouraged to upgrade to Windchill PDMLink and get the following benefits:

- Complete integration across all application areas
- Upgradeability, maintainability, and supportability
- Lower total cost of ownership

The following documentation is available

- *Windchill Customizer's Guide*
- *Windchill Application Developer Guide*
- Windchill API documentation
- List of Pro/INTRALINK 8.0 supported packages
- Subset of Rose Model available in HTML format
- Documentation for how to create Services and Processors without the use of Rational Rose
- Windchill UML Model Documentation

While Pro/INTRALINK 3.x Toolkit applications and triggers are coded in C programming language which has to be compiled and distributed for each hardware target platform, Pro/INTRALINK 8.0 is fully based on the JAVA programming language which is platform independent.

Due to the architecture of Pro/INTRALINK 3.x most toolkit customizations are implemented as client side triggers. Pretriggers often check the validity of a check in or promote request. Post triggers often initiate the creation of deliverables like plot files or even exchange data with external systems. With Pro/INTRALINK 8.0 the architecture differs in that most of such customizations will be implemented directly on the server by the means of event listeners which can veto the client action when required. This server-oriented architecture is much more stable and scalable compared to the old client-oriented Pro/INTRALINK 3.x architecture which is more often affected by network outages or users terminating the Pro/INTRALINK 3.x client while the trigger is still executing.

Another aspect of the new Pro/INTRALINK 8.0 architecture is that all Pro/ENGINEER CAD file operations, such as Download to Workspace, Upload to the Commonsplace, and the dependency management are now handled internally by the Pro/ENGINEER Wildfire session. Therefore all Pro/INTRALINK 3.x toolkit functions for the management of workspace and library items are no longer available within the Pro/INTRALINK 8.0 API.

Pro/INTRALINK 8.0 API

The following table lists the specific chapters and sections of the Pro/TOOLKIT manual relevant to the Pro/INTRALINK 8.0 API and the corresponding JAVA packages. It is provided in order to allow the experienced Java programmer to navigate more quickly through the Windchill Java API. It is mandatory to have a

full understanding of the Windchill architecture and customizations concepts before creating CAD document centric customizations.

Pro/Toolkit Manual Chapter	Corresponding Packages
Chapter 4, Session Management Functions Log in Transactions	wt.auth wt.pom
Chapter 5, Error Handling Function Error Status	wt.util
Chapter 6, Object Relationship Functions Dependency Graph Baseline Dependency	wt.graph wt.vc.baseline wt.epm.structure Info*Engine Webjects
Chapter 7, User Functions User and Group Role Action	wt.org wt.team action validators
Chapter 8, Authorization Functions PDM Authorization Object and Domain-based Authorization Attribute Authorization	wt.session wt.access wt.team
Chapter 9, Data Organization Functions File Space File Vault Folder	wt.inf.container wt.fv wt.folder com.ptc.core.foundation.folder. com.ptc.netmarkets.folder
Chapter 10, File Replication Defining Preferred Content Cache Site	wt.fv. wt.prefs
Chapter 11, Query Functions	wt.query.* Info*Engine Webjects

Pro/Toolkit Manual Chapter	Corresponding Packages
Chapter 12, PIV Specifier Language Configuration	wt.vc.config
Chapter 13, Conflicts	com.ptc.windchill.cadx.console
Chapter 14, Triggers Trigger Functions Creating a Trigger	wt.services
Chapter 17, Checkout Functions Fetching Product Item Versions Checkout	wt.vc.config wt.vc
Chapter 19, Baseline and Branch	wt.vc.baseline wt.vc
Chapter 20, Concurrent Design Functions	wt.vc.wt.vc.wip wt.lock
Chapter 21, Product Item Functions Product Item Product Item Type Definition Product Item Version Release Scheme Revision Scheme	wt.epm. wt.lifecycle via configuration and wt.series
Chapter 22, Library Navigation	wt.epm.structure
Chapter 23, Attribute Functions Attributes Attribute Class Attribute Definition	
Chapter 25, Promote Promote/Demote Privileges	wt.auth wt.lifecycle
Chapter 26, Object History Get History Functions	wt.lifecycle

Pro/Toolkit Manual Chapter	Corresponding Packages
Chapter 27, Purge	
Chapter 28, Release Management	wt.lifecycle

The following table lists the Windchill 8.0 packages that are supported in Pro/INTRALINK 8.0:

Windchill 8.0 Packages Available for Pro/INTRALINK 8.0
com.infoengine.object
com.infoengine.util
com.ptc.core.adapter.server.impl
com.ptc.core.ca.co.client.action
com.ptc.core.ca.co.client.address
com.ptc.core.ca.co.client.cache
com.ptc.core.ca.co.client.component
com.ptc.core.ca.co.client.doer
com.ptc.core.ca.co.client.doer.function
com.ptc.core.ca.co.client.element
com.ptc.core.ca.co.client.environment
com.ptc.core.ca.co.client.event
com.ptc.core.ca.co.client.frame
com.ptc.core.ca.co.client.layout
com.ptc.core.ca.co.client.list
com.ptc.core.ca.co.client.menu
com.ptc.core.ca.co.client.misc
com.ptc.core.ca.co.client.picker

Windchill 8.0 Packages Available for Pro/INTRALINK 8.0
com.ptc.core.ca.co.client.plugin
com.ptc.core.ca.co.client.primitive
com.ptc.core.ca.co.client.property
com.ptc.core.ca.co.client.property.binary
com.ptc.core.ca.co.client.property.date
com.ptc.core.ca.co.client.property.enumerated
com.ptc.core.ca.co.client.property.hyperlink
com.ptc.core.ca.co.client.property.integer
com.ptc.core.ca.co.client.property.real
com.ptc.core.ca.co.client.property.string
com.ptc.core.ca.co.client.propertyPanel
com.ptc.core.ca.co.client.search
com.ptc.core.ca.co.client.selection
com.ptc.core.ca.co.client.simple
com.ptc.core.ca.co.client.table
com.ptc.core.ca.co.client.table.pref
com.ptc.core.ca.co.client.tree
com.ptc.core.ca.co.client.windchill
com.ptc.core.ca.co.client.wizard
com.ptc.core.ca.co.common.config
com.ptc.core.ca.generic.config.common
com.ptc.core.ca.generic.config.descriptor.common.impl
com.ptc.core.ca.generic.config.utilities.common.impl
com.ptc.core.ca.generic.statuspanel.common

Windchill 8.0 Packages Available for Pro/INTRALINK 8.0
com.ptc.core.ca.swing.datatransfer.client
com.ptc.core.ca.web.client.action
com.ptc.core.ca.web.client.address
com.ptc.core.ca.web.client.cache
com.ptc.core.ca.web.client.content
com.ptc.core.ca.web.client.doer.function.impl
com.ptc.core.ca.web.client.element
com.ptc.core.ca.web.client.environment
com.ptc.core.ca.web.client.frame
com.ptc.core.ca.web.client.gw
com.ptc.core.ca.web.client.layout
com.ptc.core.ca.web.client.list
com.ptc.core.ca.web.client.menu
com.ptc.core.ca.web.client.misc
com.ptc.core.ca.web.client.picker
com.ptc.core.ca.web.client.plugin
com.ptc.core.ca.web.client.primitive
com.ptc.core.ca.web.client.property
com.ptc.core.ca.web.client.property.binary
com.ptc.core.ca.web.client.property.date
com.ptc.core.ca.web.client.property.enumerated
com.ptc.core.ca.web.client.property.hyperlink
com.ptc.core.ca.web.client.property.integer
com.ptc.core.ca.web.client.property.real
com.ptc.core.ca.web.client.property.string

Windchill 8.0 Packages Available for Pro/INTRALINK 8.0
com.ptc.core.ca.web.client.propertyPanel
com.ptc.core.ca.web.client.search
com.ptc.core.ca.web.client.selection
com.ptc.core.ca.web.client.table
com.ptc.core.ca.web.client.tree
com.ptc.core.ca.web.client.wizard
com.ptc.core.client.doer.function.impl
com.ptc.core.client.picker
com.ptc.core.client.property.binary
com.ptc.core.client.table
com.ptc.core.client.web.action
com.ptc.core.command.common
com.ptc.core.command.common.bean.entity
com.ptc.core.command.common.bean.repository
com.ptc.core.command.common.delegate
com.ptc.core.foundation.admin.server.processors
com.ptc.core.foundation.client.co.action
com.ptc.core.foundation.client.doer.function.impl
com.ptc.core.foundation.client.web.action
com.ptc.core.foundation.content.client
com.ptc.core.foundation.content.server.impl
com.ptc.core.foundation.fc.server.impl
com.ptc.core.foundation.folder.common
com.ptc.core.foundation.folder.server.impl

Windchill 8.0 Packages Available for Pro/INTRALINK 8.0
com.ptc.core.foundation.generic.common
com.ptc.core.foundation.generic.server.impl
com.ptc.core.foundation.instance.server
com.ptc.core.foundation.lifecycle.server.impl
com.ptc.core.foundation.locks.common
com.ptc.core.foundation.occurrence.server.impl
com.ptc.core.foundation.org.server.impl
com.ptc.core.foundation.persistable.server.impl
com.ptc.core.foundation.queue.client.web.property.string
com.ptc.core.foundation.session.server.impl
com.ptc.core.foundation.team.server.impl
com.ptc.core.foundation.util.common
com.ptc.core.foundation.vc.common
com.ptc.core.foundation.vc.views.server.impl
com.ptc.core.foundation.vc.wip.common
com.ptc.core.foundation.wvs.server.impl
com.ptc.core.HTMLtemplateutil.server.processors
com.ptc.core.logic.repository.common.impl
com.ptc.core.meta.common
com.ptc.core.meta.common.impl
com.ptc.core.meta.container.common
com.ptc.core.meta.container.common.impl
com.ptc.core.meta.descriptor.common
com.ptc.core.meta.descriptor.server.impl

Windchill 8.0 Packages Available for Pro/INTRALINK 8.0
com.ptc.core.meta.type.command.typemodel.common
com.ptc.core.meta.type.command.typemodel.server
com.ptc.core.meta.type.common.
com.ptc.core.meta.type.common.impl
com.ptc.core.meta.type.mgmt.common
com.ptc.core.meta.type.runtime.common
com.ptc.core.meta.type.runtime.server.impl
com.ptc.core.meta.type.runtime.server.impl
com.ptc.core.meta.type.runtime.server.impl.moded
com.ptc.core.meta.type.sever
com.ptc.core.query.command.common
com.ptc.core.query.common.impl
com.ptc.core.query.report.bom.common
com.ptc.core.query.report.bom.server
com.ptc.core.query.report.client.generation
com.ptc.core.query.report.command.common
com.ptc.core.util.feedback.common
com.ptc.core.util.feedback.common.impl
com.ptc.netmarkets.folder
com.ptc.netmarkets.forumTopic
com.ptc.netmarkets.projmgmt
com.ptc.netmarkets.subscription
com.ptc.netmarkets.util.misc
com.ptc.windchill.cadx.caddoc

Windchill 8.0 Packages Available for Pro/INTRALINK 8.0
com.ptc.windchill.cadx.cancelcheckout
com.ptc.windchill.cadx.checkin
com.ptc.windchill.cadx.checkout
com.ptc.windchill.cadx.common
com.ptc.windchill.cadx.common.container
com.ptc.windchill.cadx.common.pageBuilder
com.ptc.windchill.cadx.common.pageBuilder.d esc
com.ptc.windchill.cadx.common.picker
com.ptc.windchill.cadx.common.picker.table
com.ptc.windchill.cadx.common.util
com.ptc.windchill.cadx.console
com.ptc.windchill.cadx.delete
com.ptc.windchill.cadx.deletews
com.ptc.windchill.cadx.editattachments
com.ptc.windchill.cadx.move
com.ptc.windchill.cadx.multirevise
com.ptc.windchill.cadx.newcaddoc
com.ptc.windchill.cadx.newcaddoctemplate
com.ptc.windchill.cadx.newfolder
com.ptc.windchill.cadx.prowt.download
com.ptc.windchill.cadx.prowt.openinproe
com.ptc.windchill.cadx.remove
com.ptc.windchill.cadx.rename
com.ptc.windchill.cadx.revise
com.ptc.windchill.cadx.search

Windchill 8.0 Packages Available for Pro/INTRALINK 8.0
com.ptc.windchill.cadx.update
com.ptc.windchill.cadx.upload
com.ptc.windchill.cadx.ws
com.ptc.windchill.cadx.wsoption
com.ptc.windchill.enterprise.change2.server.impl
com.ptc.windchill.enterprise.copy.server
com.ptc.windchill.enterprise.doc.server
com.ptc.windchill.enterprise.org.client.impl
com.ptc.windchill.enterprise.part.server.impl
com.ptc.windchill.enterprise.patternForPicker.client
com.ptc.windchill.enterprise.prefs.server.processors
com.ptc.windchill.enterprise.search.client
com.ptc.windchill.enterprise.templates
com.ptc.windchill.enterprise.templates.doc.server
com.ptc.windchill.pdmlink.clients.beans
com.ptc.windchill.pdmlink.clients.beans.explorer
com.ptc.windchill.pdmlink.clients.folderexplorer
com.ptc.windchill.pdmlink.clients.prodmgmt
com.ptc.windchill.pdmlink.clients.util
com.ptc.windchill.pdmlink.clients.vc
com.ptc.windchill.pdmlink.doc.client
com.ptc.windchill.pdmlink.doc.client

Windchill 8.0 Packages Available for Pro/INTRALINK 8.0
com.ptc.windchill.pdmlink.doc.server
com.ptc.windchill.pdmlink.doc.server.processors
com.ptc.windchill.pdmlink.lifecycle.server.processors
com.ptc.windchill.pdmlink.load
com.ptc.windchill.pdmlink.search
com.ptc.windchill.pdmlink.search.server.processors
com.ptc.windchill.pdmlink.subscription.server.processors
com.ptc.windchill.pdmlink.templates.doc.server
com.ptc.windchill.pdmlink.templateutil.server.processors
wt.access
wt.adapter
wt.admin
wt.audit
wt.auth
wt.boot
wt.build
wt.cache
wt.change2
wt.change2.htmlclient
wt.change2.process
wt.clients.beans
wt.clients.beans.explorer
wt.clients.checker

Windchill 8.0 Packages Available for Pro/INTRALINK 8.0
wt.clients.content
wt.clients.dnd
wt.clients.dndMicroApplet
wt.clients.doc
wt.clients.folder
wt.clients.folderexplorer
wt.clients.gui
wt.clients.homepage
wt.clients.prefs
wt.clients.util
wt.clients.util.http
wt.clients.vc
wt.clients.widget
wt.content
wt.doc
wt.enterprise
wt.enterprise.tabularresults
wt.epm
wt.epm.build
wt.epm.clients.relateditems
wt.epm.familytable
wt.epm.identity
wt.epm.listeners
wt.epm.ndi
wt.epm.structure

Windchill 8.0 Packages Available for Pro/INTRALINK 8.0
wt.epm.structure.occurrences
wt.epm.supportingdata
wt.epm.upload
wt.epm.util
wt.epm.workspaces
wt.events
wt.fc.batch
wt.fc.collections
wt.fc.delete
wt.fc.manifest
wt.federation
wt.feedback
wt.folder
wt.folder.cache
wt.fv
wt.fv.master
wt.graph
wt.graph.processor
wt.graph.service
wt.help
wt.htmlutil
wt.httpgw
wt.httpgw.filter
wt.iba.definition
wt.iba.definition.service

Windchill 8.0 Packages Available for Pro/INTRALINK 8.0
wt.iba.value.litevalue
wt.identity
wt.index
wt.inf.container
wt.inf.library
wt.inf.team
wt.inf.template
wt.intersvrcom
wt.introspection
wt.ixb.actor
wt.ixb.clientAccess
wt.ixb.conflictFramework
wt.ixb.conflictFramework.conflictResolution
wt.ixb.handlers.forclasses
wt.ixb.handlers.netmarkets
wt.ixb.mapping
wt.ixb.objectset
wt.ixb.objectset.handlers.navigator
wt.ixb.publicforapps
wt.ixb.publicforhandlers
wt.lifecycle
wt.load
wt.locks
wt.mail
wt.manager

Windchill 8.0 Packages Available for Pro/INTRALINK 8.0
wt.maturity
wt.meeting
wt.meeting.actionitem
wt.meta
wt.method
wt.notify
wt.occurrence
wt.org
wt.org.electronicIdentity
wt.org.electronicIdentity.engines
wt.pdmlink
wt.pds
wt.pom
wt.prefs
wt.prefs.delegates
wt.prefs.registry
wt.query
wt.query.report
wt.query.template
wt.queue
wt.recent
wt.replication.export
wt.replication.imp
wt.replication.receiver
wt.replication.sender

Windchill 8.0 Packages Available for Pro/INTRALINK 8.0
wt.replication.unit
wt.rule
wt.rule.impl
wt.rule.init
wt.rule.util
wt.security
wt.series
wt.services
wt.services.applicationcontext.implementation
wt.session
wt.sysadm
wt.taglib.util
wt.team
wt.templateutil.components
wt.templateutil.navigationbar
wt.templateutil.processor
wt.templateutil.table
wt.tools.profiler
wt.ufid.delegates
wt.units
wt.util
wt.util.resource
wt.util.version
wt.util.xml
wt.util.xml.xpath

Windchill 8.0 Packages Available for Pro/INTRALINK 8.0
wt.util.xml.xslt
wt.vc
wt.vc.baseline
wt.vc.config
wt.vc.sessioniteration
wt.vc.struct
wt.vc.views
wt.vc.wip
wt.viewmarkup
wt.visitor
Windchill PDMLink 8.0 Packages Available for Pro/INTRALINK 8.0
com.ptc.windchill.pdmlink.clients.beans
com.ptc.windchill.pdmlink.clients.folderexplorer
com.ptc.windchill.pdmlink.clients.util
com.ptc.windchill.pdmlink.clients.vc
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Pro/INTRALINK 8.0 Terminology

Pro/INTRALINK 3.x and Pro/INTRALINK 8.0 Terminology


The following table lists and describes terminology differences between Pro/INTRALINK 3.x and Pro/INTRALINK 8.0. See the [Glossary](#) for definitions of terminology introduced with Pro/INTRALINK 8.0.

Pro/INTRALINK 3.x Term	Pro/INTRALINK 3.x Term Definition	Pro/INTRALINK 8.0 Term	Pro/INTRALINK 8.0 Term Definition
Revision	Unique Pro/INTRALINK objects are assigned a <i>revision</i> and <i>version</i> (N.n, where N is the revision). The default revision sequence is 1,2,3, and so on. An object's revision is changed using the Set Revision action.	Version	Unique Windchill objects are assigned a <i>revision</i> and an <i>iteration</i> , which together comprise a <i>version</i> (N.n, where N is the revision). The default revision sequence is A, B, C, and so on. An object's revision is changed using the Revise action.
Version	The default version sequence is 1,2,3, and so on. The version of an object increments each time the object is checked in.	Iteration	The default iteration sequence is 1,2,3, and so on. The iteration of an object increments each time the object is checked in.

Pro/INTRALINK 3.x Term	Pro/INTRALINK 3.x Term Definition	Pro/INTRALINK 8.0 Term	Pro/INTRALINK 8.0 Term Definition
Set Revision	Action to change a Pro/INTRALINK 3.x object's revision level.	Revise	Action to change a Pro/INTRALINK 8.0 or Windchill PDMLink object's version.
Check out	Transfers object metadata and content to a workspace on the local client machine.	Download	Transfers object metadata and content to a workspace on the local client machine.
Lock	Assigns modify access for an object to a single user, preventing other users from creating new versions/iterations of the object in the database.	Check out	Assigns modify access for an object to a single user, preventing other users from creating new versions/iterations of the object in the database.
Check in	A command that allows users to update the database with new versions/iterations of objects based on the changes made in to objects in a workspace.	Check in	Allows users to update the database with new versions/iterations of objects based on the changes made to objects in a workspace.
Hold	A manual operation applied to one or more objects to explicitly prevent a user from unintentionally checking in any changes made to the object.	Download without check out	Modifies a downloaded object without checking it out. Similar to Hold in Pro/INTRALINK 3.x.
Object History Report	The object history report records the details about an object's history, including creation, new versions, check in forms, and renames.	Iteration History Version History Saved As History	The Windchill iteration, version, and save as history reports provide details about an object's history, including version history, iteration history, and save as history.

Pro/INTRALINK 3.x Term	Pro/INTRALINK 3.x Term Definition	Pro/INTRALINK 8.0 Term	Pro/INTRALINK 8.0 Term Definition
Briefcase	A briefcase is a temporary collection of objects added from different places so that you can modify them as separate entities from a single location. Actions available within the briefcase include multi-object Checkout, Delete, Promote, and Add to Baseline.	Notebook	A notebook is a collection of links created and organized into folders and subfolders. A link is a URL to something either inside or outside of the Windchill system. You cannot perform actions on the objects themselves from the notebook.
Release scheme	A release scheme is sequential set of release levels. Release levels are used to track an object's life cycle. Release levels are grouped into release schemes to reflect different life cycles for different objects. A release scheme is assigned to a folder and is used for all objects in the folder.	Life cycle	A life cycle is a sequential set of phases and gates. Each phase is referred to as a life cycle state. A life cycle is used to manage business objects as they progress from conceptualization through obsolescence. Each object can be assigned a different life cycle regardless of its storage location. Life cycle assignment can be controlled by Object Initialization Rules.
Release level	The development of an object for release follows a general progression of increased maturity. <i>Release levels</i> represent the different states of maturity that a model passes through from start to finish.	Life cycle state	Life cycles define the states and transitions associated with the maturity of various business objects.

Pro/INTRALINK 3.x Term	Pro/INTRALINK 3.x Term Definition	Pro/INTRALINK 8.0 Term	Pro/INTRALINK 8.0 Term Definition
RTP (Request to Promote) Process or Promotion Process	A promotion process is used to advance the release level of engineering artifacts. Any version can be promoted or demoted.	Promotion Request or Promotion Process	A promotion request is used to advance the business maturity level of engineering artifacts. The promotion review process can be used to author, review, and release versions of items based on their life cycle states. Only the latest iteration of a version can be promoted or demoted.
Release Form, RTP Form, Release Level Change Form, Promotion Form	Release forms (RTP Forms) create a persistent record of the set of items promoted by a given promotion request.	Promotion Request	Promotion requests create a persistent record of the set of items promoted by a given promotion request.
Work in Progress (WIP)	A specific release level commonly used by Pro/INTRALINK users. For example, a design engineering release scheme may have the following release levels: Work In Progress, Checking, and Released.	In Work	A specific life cycle state commonly used by Windchill users.
PI (Product Item) PIV (Product Item Version)	The product item is the master object in Pro/INTRALINK. A product item version is a specific version of that object that holds the content.	CAD Document master CAD Document iteration	The CAD document master is the master object. A CAD document iteration contains a specific iteration of that object that holds the actual CAD data content.

Pro/INTRALINK 3.x Term	Pro/INTRALINK 3.x Term Definition	Pro/INTRALINK 8.0 Term	Pro/INTRALINK 8.0 Term Definition
PIV Info Page	The information page for an item. It is accessed using the Object > Information or RMB > Information menu selections.	information pages	Item information pages are available in Pro/INTRALINK 8.0 but are not specifically labeled as such. To view an item's information page, click the Details button  next to the item or select Details from the item's actions list.
Baseline	A collection of specific PIVs.	Managed Baseline	A collection of specific CAD document iterations.
File Based Attribute	An attribute that is shared by both Pro/ENGINEER and Pro/INTRALINK which can only be edited in a Pro/ENGINEER session or in the workspace. Changes to file-based attributes require a check-out and check-in transaction to be updated.	Instanced Based Attribute	An attribute that is shared by both Pro/ENGINEER and Pro/INTRALINK which can be edited in a Pro/ENGINEER session or in Pro/INTRALINK 8.0. Changes to file-based attributes require a check-out and check-in transaction to be updated.
Dependency Attribute	An attribute on a link between two different objects.	Dependency Attribute	An attribute on a link between two different objects.
Storage Cluster	The logical storage location.	File Vault	The logical storage location.
Vault	The physical storage location.	File Folder	The physical storage location which is mounted to a file vault.
File Replication	Allows files to be replicated to a different storage cluster.	Content Replication	Allows files to be replicated from and to a replicata vault managed by a separate replica site.

Pro/INTRALINK 3.x Term	Pro/INTRALINK 3.x Term Definition	Pro/INTRALINK 8.0 Term	Pro/INTRALINK 8.0 Term Definition
File Server	Basic service for storing files into vaults.	Replica Site	Lightweight Windchill installation for storing files into replica vaults.

Glossary

This glossary defines terminology that is introduced in Pro/INTRALINK 8.0.

Container

Containers are set up in a hierarchy so that the rules and data created in one container can be available to child containers and the domains in one container can have child domains in a child container. The child domains inherit information from ancestor domains.

Domain

A collection of objects that are subject to the same administrative policies, such as access control, indexing, event notification, and external file vaulting.

Library

A library provides a place for storing and providing access to business information, such as documents and parts.

Life cycle

In Windchill applications, an automated, graphical model, that employs phases and gates to manage business objects as they progress from conceptualization through obsolescence.

Part

In Windchill PDM/Link, a part typically represents an entry in the PDM/ERP-BOM. A part can be linked to a CAD document which holds the CAD data. Parts are not available in Pro/INTRALINK 8.0, but references to parts may appear in Windchill documentation.

Principal

In Windchill applications, an individual user or user group.

Product

A product is typically thought of as the physical item manufactured and sold to customers. Pro/INTRALINK 8.0 expands the concept of a product to include the environment in which users collaborate to develop that end item. This environment is known as the *product context*.

Site

The *site* is the company. The *site administrator* is the administrator that gets the system up and running for the customer. The **Site** tab provides access to all administrative areas, rules, and data of the site.

Workflow

Enables you to automate procedures in which information, tasks, and documents are passed among several participants.