

# **Pro/INTRALINK 9.0/9.1 Curriculum Guide**

NOTE: For a graphical depiction of the curriculum based on job role, please visit this page:  
[http://www.ptc.com/services/edserv/learning/paths/ptc/proi\\_90.htm](http://www.ptc.com/services/edserv/learning/paths/ptc/proi_90.htm)

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## Live Classroom Curriculum Guide

- Introduction to Pro/INTRALINK 9.0/9.1
  - Introduction to ProductView 9.0
  - Windchill 9.0/9.1 System Administration
  - Pro/INTRALINK 9.0/9.1 Business Administration
  - Migrating Pro/INTRALINK 3.4 Data to Windchill 9.0
-

## Introduction to Pro/INTRALINK 9.0/9.1

|               |            |
|---------------|------------|
| Course Code   | TRN-2137-T |
| Course Length | 2 Days     |

### Overview

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In this course, you will learn how to complete basic Pro/INTRALINK functions including how to access and navigate the Pro/INTRALINK environment, locate and view product information, complete assigned tasks, as well as use Pro/INTRALINK's communication and collaboration tools. You will also learn the key capabilities and features of Pro/INTRALINK CAD Data Management and how to use Pro/INTRALINK to manage Pro/ENGINEER design information. Specifically, you will focus on the day-to-day data management tasks required by the Pro/ENGINEER user community.

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

After completing the course, you will be prepared to complete basic Pro/INTRALINK tasks and activities, manage Pro/ENGINEER design information, as well as have a better understanding of the Pro/INTRALINK system implementation at your company.

### Prerequisites

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- Basic browser and Web navigation skills.
- Basic understanding of Product Data Management processes and deliverables.
- Working knowledge of Pro/ENGINEER Wildfire 3.0.

### Audience

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This course is intended for end users and System Administrators. The topics in this course are also available as Web-based training courses.

### Topics

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- Introduction to the Pro/INTRALINK Environment
  - Locating Information
  - Viewing Information
  - Getting Started with Pro/ENGINEER Data Management
  - Initiating New Designs and Sharing Design Information
  - Modifying and Managing Design Information
  - Understanding File Relationships and Dependencies
  - Managing Family Tables
  - Managing the Workspace Environment
  - Participating in Processes
  - Managing Standard Documents
-

- Managing Your Work
  - Windchill 9.1 Enhancements
-

## Agenda

### Day 1

|          |   |
|----------|---|
| Module 1 | Introduction to the Pro/INTRALINK Environment         |
| Module 2 | Locating Information                                  |
| Module 3 | Viewing Information                                   |
| Module 4 | Getting Started with Pro/ENGINEER Data Management     |
| Module 5 | Initiating New Designs and Sharing Design Information |
| Module 6 | Modifying and Managing Design Information             |

### Day 2

|           |   |
|-----------|---|
| Module 7  | Understanding File Relationships and Dependencies |
| Module 8  | Managing Family Tables                            |
| Module 9  | Managing the Workspace Environment                |
| Module 10 | Participating in Processes                        |
| Module 11 | Managing Standard Documents                       |
| Module 12 | Managing Your Work                                |

## Introduction to ProductView 9.0

|               |            |
|---------------|------------|
| Course Code   | TRN-2140-T |
| Course Length | 1 Day      |

### Overview

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In this course, you will learn about ProductView tools and techniques that are most commonly used. Using the ProductView Standard client, you will learn how to locate and view models in Windchill and Pro/INTRALINK PDM solutions.

Through exercises, you will learn to use the ProductView Standard interface to orient and interrogate 3-D models, explode components, measure 2-D and 3-D geometry on models, section models, as well as annotate and mark-up models. You will also learn how to query model data and how to collaborate with other users regardless of physical location.

At the end of the course, a Pro/FICIENCY skills assessment will be used to reinforce your understanding of the course topics.

### Prerequisites

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- Introduction to Windchill PDMLink 9.0 or
- Introduction to Windchill ProjectLink 9.0

### Audience

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This course is intended for all enterprise data users that use the ProductView 9.0 standard client.

### Topics

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- Introduction to visualization
  - Orienting design models
  - Changing model appearances
  - Exploding model components
  - Introduction to construction geometry
  - Displaying dimensions
  - Measuring distances
  - Introduction to sectioning models
  - Introduction to annotations and mark-ups
  - Querying data
  - Viewing drawings
  - Collaborate in real-time online
-

## Agenda

### Day 1

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|          |                                       |
|----------|---------------------------------------|
| Module 1 | Introduction to Visualization         |
| Module 2 | Introduction to ProductView           |
| Module 3 | Collaborating Online with ProductView |
| Module 4 | Creating Construction Geometry        |
| Module 5 | Creating Annotations                  |
| Module 6 | Sectioning Models                     |

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## Windchill 9.0/9.1 System Administration

|               |            |
|---------------|------------|
| Course Code   | TRN-2141-T |
| Course Length | 3 Days     |

### Overview

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In this course, you will learn how to install and configure Windchill system components, including PDMLink and ProjectLink. You will learn how to perform routine Windchill system administration tasks including how to shut down and start Windchill services, conduct performance testing, and tune up Windchill components for performance. You will also learn how to manage a distributed system environment and plan and run basic backup and recovery procedures. Other topics include managing system performance with Oracle 10g, managing memory and CPU allocation, troubleshooting background queues, and monitoring firewall activity and security.

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

At the end of each module, you will complete Pro/FICIENCY skills assessment questions. These questions are used to help reinforce your understanding of the course topics and form the basis for review of any topics, if necessary.

After completing the course, you will be prepared to complete basic Windchill PDMLink tasks and activities, as well as have a better understanding of the Windchill PDMLink system implementation at your company.

### Prerequisites

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- Familiarity with the Windchill PDMLink 9.0/9.1 or Windchill ProjectLink 9.0/9.1 user interface.
- Familiarity with the Windows command prompt and the ability to form and execute basic SQL statements.

### Audience

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This training course is intended for System Administrators and Application Developers.

### Topics

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- Identifying Windchill System Components
  - Installing Windchill Components
  - Performance Testing
  - External File Storage
  - Data Replication
  - Workflow Performance Tuning
  - Database Performance Tuning
  - System Backup and Recovery
  - Windchill Infrastructure Security
  - Windchill 9.1 System Administration Enhancements
-

## Agenda

### Day 1

|          |   |
|----------|---|
| Module 1 | Identifying Windchill System Components |
| Module 2 | Installing Windchill Components         |
| Module 3 | Managing Windchill Services             |
| Module 4 | Performance Testing                     |

### Day 2

|          |                           |
|----------|---------------------------|
| Module 5 | External File Storage     |
| Module 6 | Data Replication          |
| Module 7 | Tuning Application Server |
| Module 8 | Tuning Workflow Processes |

### Day 3

|           |                                   |
|-----------|-----------------------------------|
| Module 9  | Oracle Performance Tuning         |
| Module 10 | Windchill Backup and Recovery     |
| Module 11 | Windchill Infrastructure Security |

## Pro/INTRALINK 9.0/9.1 Business Administration

|               |            |
|---------------|------------|
| Course Code   | TRN-2146-T |
| Course Length | 3 Days     |

### Overview

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Pro/INTRALINK is designed to help designers and manufacturers control design information and manage the processes associated with product development. In this course, you will learn how to perform basic Pro/INTRALINK 9.0 and 9.1 administration tasks. You will learn how to plan and create user accounts and groups, and how to plan and create information management storage strategies. Other topics include life cycles, teams, configuring domain policies, and configuring Pro/ENGINEER integration. These skills are important because they enable a Business Administrator to configure Pro/INTRALINK to meet business needs.

At the end of each module, you will complete Pro/FICIENCY skills assessment questions. These questions are used to help reinforce your understanding of the course topics and form the basis for daily review sessions.

After completing the course, you will be well prepared to set up and manage a basic Pro/INTRALINK implementation at your company.

### Prerequisites

---

- Introduction to Pro/INTRALINK 9.0/9.1 instructor-led training course.
- Knowledge of your company's information management business rules, business requirements, and existing business processes.

### Audience

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This course is intended for Business Administrators, System Administrators, and project team leaders. Implementation team members, including user adoption team members, and those with general Pro/INTRALINK administration responsibilities will also benefit from taking this course.

### Topics

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- Planning and creating user accounts and groups.
  - Planning and creating information storage locations: Products and Libraries.
  - Planning and configuring data management access control policies.
  - Planning and implementing data management templates.
  - Planning and configuring user notification of system events.
  - Managing data development and business processes through life cycles.
  - Configuring Pro/ENGINEER integration.
  - Administering new designs.
  - Working with Pro/INTRALINK administration support tools.
  - Identify new user and administration preferences.
  - Enable packages and administer package roles.
  - Configure new object relationships.
-

- Move objects between organizations and contexts.

## Agenda

### Day 1

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|          |   |
|----------|---|
| Module 1 | Introduction to Pro/INTRALINK 9.0 Business Administration |
| Module 2 | Managing Principals                                       |
| Module 3 | Managing Object Types and Attributes                      |
| Module 4 | Managing Contexts   |
| Module 5 | Automating Processes Using Life Cycles                    |

### Day 2

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|          |   |
|----------|---|
| Module 6 | Managing Domain Policies and Access Control |
| Module 7 | Managing Teams                              |
| Module 8 | Managing Object Type Behavior               |
| Module 9 | Configuring Pro/ENGINEER for Windchill      |

### Day 3

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|           |  |
|-----------|--|
| Module 10 | Administering New Designs in Windchill                           |
| Module 11 | Administrative Support Tools                                     |
| Module 12 | Administering Pro/INTRALINK and Testing the Business Environment |

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## Migrating Pro/INTRALINK 3.4 Data to Windchill 9.0

|               |            |
|---------------|------------|
| Course Code   | TRN-2160-T |
| Course Length | 2 Day's    |

### Overview

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In this course, you will learn how to perform a production migration from Pro/INTRALINK 3.x to the Windchill™ architecture. You will also learn how to conduct a migration effort properly, including planning, preparing the systems for migration, practicing the migration, and conducting the production migration. Lastly, you will discuss post migration tasks.

At the end of the course, a Pro/FICIENCY skills assessment will be used to reinforce your understanding of the course topics.

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

### Prerequisites

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- You must be a system administrator for a production Pro/INTRALINK 3.x system at their site.
- You must have taken one of the following courses:
  - Pro/INTRALINK 8.0 Business Administration
  - Pro/INTRALINK 9.0 Business Administration
  - PDMLink 8.0 Business Administration
  - PDMLink 9.0 Business Administration

### Audience

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This course is designed for customers who have chosen to lead a migration from Pro/INTRALINK 3.x to one of the following products:

- Pro/INTRALINK 8.0 or 9.0.
- Windchill PDMLink 8.0 or 9.0.

Note: This class is primarily for migrations to Windchill 9.0. However, if you are migrating to Windchill 8.0, all the skills learned in this course are relevant. Demonstrations and labs will be based upon Windchill 9.0, but all skills learned are easily applied to Windchill 8.0.

### Topics

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- Overview of the Migration Process
  - Planning a Migration
  - Preparing the Source and Target Systems for Migration
  - Installing the Pro/INTRALINK Data Migrator
  - Identifying and Resolving Data Conflicts
  - Performing a Rehearsal Migration
  - Performing a Production Migration
  - Migrating WTParts (Migrations to Windchill PDMLink only)
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## Agenda

### Day 1

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|          |  |
|----------|--|
| Module 1 | Process Overview                           |
| Module 2 | Planning a Migration                       |
| Module 3 | Preparing the Systems for Migration        |
| Module 4 | Installing the Pro/INTRALINK Data Migrator |

### Day 2

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|          |                                     |
|----------|-------------------------------------|
| Module 5 | Data Mapping                        |
| Module 6 | Identifying and Resolving Conflicts |
| Module 7 | Conducting a Full Migration         |
| Module 8 | Migrating WTParts to PDMLink        |

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## Web Based Curriculum Guide

- Introduction to Pro/INTRALINK 9.0/9.1
  - Introduction to ProductView 9.0
  - Windchill 9.0/9.1 System Administration
  - Pro/INTRALINK 9.0/9.1 Business Administration
  - Migrating Pro/INTRALINK 3.4 Data to Windchill 9.0
  - Pro/INTRALINK 9.0 - Application Orientation
  - Pro/INTRALINK 9.0 - Pro/ENGINEER Data Management
  - Pro/INTRALINK 9.0 - Standard Document Management
  - Pro/INTRALINK 9.0 - Work Environment Management
  - Windchill ProjectLink 9.1 - Enhancements and New Functionality
  - ProductView 9.0 - Application Orientation
  - ProductView 9.0 - Annotating and Sectioning
  - Windchill 9.0/9.1 System Administration
  - Pro/INTRALINK 9.0 Business Administration - Business Environment Administration
  - Pro/INTRALINK 9.0 Business Administration - Pro/ENGINEER Data Administration
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- Pro/INTRALINK 9.0 - System Orientation
  - Pro/INTRALINK 9.1 Business Administration - Enhancements and New Functionality
  - Migrating Pro/INTRALINK 3.4 Data to Windchill 9.0
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## Introduction to Pro/INTRALINK 9.0/9.1

|               |               |
|---------------|---------------|
| Course Code   | TRN-WBT2137-S |
| Course Length | 16 Hours      |

### Overview

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In this course, you will learn how to complete basic Pro/INTRALINK functions including how to access and navigate the Pro/INTRALINK environment, locate and view product information, complete assigned tasks, as well as use Pro/INTRALINK's communication and collaboration tools. You will also learn the key capabilities and features of Pro/INTRALINK CAD Data Management and how to use Pro/INTRALINK to manage Pro/ENGINEER design information. Specifically, you will focus on the day-to-day data management tasks required by the Pro/ENGINEER user community.

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

After completing the course, you will be prepared to complete basic Pro/INTRALINK tasks and activities, manage Pro/ENGINEER design information, as well as have a better understanding of the Pro/INTRALINK system implementation at your company.

### Prerequisites

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- Basic browser and Web navigation skills.
- Basic understanding of Product Data Management processes and deliverables.
- Working knowledge of Pro/ENGINEER Wildfire 3.0.

### Audience

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This course is intended for end users and System Administrators. The topics in this course are also available as Web-based training courses.

### Topics

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- Introduction to the Pro/INTRALINK Environment
  - Locating Information
  - Viewing Information
  - Getting Started with Pro/ENGINEER Data Management
  - Initiating New Designs and Sharing Design Information
  - Modifying and Managing Design Information
  - Understanding File Relationships and Dependencies
  - Managing Family Tables
  - Managing the Workspace Environment
  - Participating in Processes
  - Managing Standard Documents
-

- Managing Your Work
  - Windchill 9.1 Enhancements
-

## Table of Contents

|            |   |
|------------|---|
| Module 1   | Introduction to the Pro/INTRALINK Environment         |
| Module 2   | Locating Information                                  |
| Module 3   | Viewing Information                                   |
| Module 4   | Getting Started with Pro/ENGINEER Data Management     |
| Module 5   | Initiating New Designs and Sharing Design Information |
| Module 6   | Modifying and Managing Design Information             |
| Module 7   | Understanding File Relationships and Dependencies     |
| Module 8   | Managing Family Tables                                |
| Module 9   | Managing the Workspace Environment                    |
| Module 10  | Participating in Processes                            |
| Module 11  | Managing Standard Documents                           |
| Module 12  | Managing Your Work                                    |
| Appendix A | Windchill 9.1 Enhancements                            |

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## Introduction to ProductView 9.0

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|---------------|---------------|
| Course Code   | TRN-WBT2140-S |
| Course Length | 8 Hours       |

### Overview

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In this course, you will learn about ProductView tools and techniques that are most commonly used. Using the ProductView Standard client, you will learn how to locate and view models in Windchill and Pro/INTRALINK PDM solutions.

Through exercises, you will learn to use the ProductView Standard interface to orient and interrogate 3-D models, explode components, measure 2-D and 3-D geometry on models, section models, as well as annotate and mark-up models. You will also learn how to query model data and how to collaborate with other users regardless of physical location.

At the end of the course, a Pro/FICIENCY skills assessment will be used to reinforce your understanding of the course topics.

### Prerequisites

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- Introduction to Windchill PDMLink 9.0 or
- Introduction to Windchill ProjectLink 9.0

### Audience

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This course is intended for all enterprise data users that use the ProductView 9.0 standard client.

### Topics

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- Introduction to visualization
  - Orienting design models
  - Changing model appearances
  - Exploding model components
  - Introduction to construction geometry
  - Displaying dimensions
  - Measuring distances
  - Introduction to sectioning models
  - Introduction to annotations and mark-ups
  - Querying data
  - Viewing drawings
  - Collaborate in real-time online
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## Table of Contents

|          |                                       |
|----------|---------------------------------------|
| Module 1 | Introduction to Visualization         |
| Module 2 | Introduction to ProductView           |
| Module 3 | Collaborating Online with ProductView |
| Module 4 | Creating Construction Geometry        |
| Module 5 | Creating Annotations                  |
| Module 6 | Sectioning Models                     |

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## Windchill 9.0/9.1 System Administration

|               |               |
|---------------|---------------|
| Course Code   | TRN-WBT2141-S |
| Course Length | 24 Hours      |

### Overview

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In this course, you will learn how to install and configure Windchill system components, including PDMLink and ProjectLink. You will learn how to perform routine Windchill system administration tasks including how to shut down and start Windchill services, conduct performance testing, and tune up Windchill components for performance. You will also learn how to manage a distributed system environment and plan and run basic backup and recovery procedures. Other topics include managing system performance with Oracle 10g, managing memory and CPU allocation, troubleshooting background queues, and monitoring firewall activity and security.

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

At the end of each module, you will complete Pro/FICIENCY skills assessment questions. These questions are used to help reinforce your understanding of the course topics and form the basis for review of any topics, if necessary.

After completing the course, you will be prepared to complete basic Windchill PDMLink tasks and activities, as well as have a better understanding of the Windchill PDMLink system implementation at your company.

### Prerequisites

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- Familiarity with the Windchill PDMLink 9.0/9.1 or Windchill ProjectLink 9.0/9.1 user interface.
- Familiarity with the Windows command prompt and the ability to form and execute basic SQL statements.

### Audience

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This training course is intended for System Administrators and Application Developers.

### Topics

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- Identifying Windchill System Components
  - Installing Windchill Components
  - Performance Testing
  - External File Storage
  - Data Replication
  - Workflow Performance Tuning
  - Database Performance Tuning
  - System Backup and Recovery
  - Windchill Infrastructure Security
  - Windchill 9.1 System Administration Enhancements
-

## Table of Contents

|            |  |
|------------|--|
| Module 1   | Identifying Windchill System Components          |
| Module 2   | Installing Windchill Components                  |
| Module 3   | Managing Windchill Services                      |
| Module 4   | Performance Testing                              |
| Module 5   | External File Storage                            |
| Module 6   | Data Replication                                 |
| Module 7   | Tuning Application Server                        |
| Module 8   | Tuning Workflow Processes                        |
| Module 9   | Oracle Performance Tuning                        |
| Module 10  | Windchill Backup and Recovery                    |
| Module 11  | Windchill Infrastructure Security                |
| Appendix A | Windchill 9.1 System Administration Enhancements |

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## Pro/INTRALINK 9.0/9.1 Business Administration

|               |               |
|---------------|---------------|
| Course Code   | TRN-WBT2146-S |
| Course Length | 24 Hours      |

### Overview

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Pro/INTRALINK is designed to help designers and manufacturers control design information and manage the processes associated with product development. In this course, you will learn how to perform basic Pro/INTRALINK 9.0 and 9.1 administration tasks. You will learn how to plan and create user accounts and groups, and how to plan and create information management storage strategies. Other topics include life cycles, teams, configuring domain policies, and configuring Pro/ENGINEER integration. These skills are important because they enable a Business Administrator to configure Pro/INTRALINK to meet business needs.

At the end of each module, you will complete Pro/FICIENCY skills assessment questions. These questions are used to help reinforce your understanding of the course topics and form the basis for daily review sessions.

After completing the course, you will be well prepared to set up and manage a basic Pro/INTRALINK implementation at your company.

### Prerequisites

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- Introduction to Pro/INTRALINK 9.0/9.1 instructor-led training course.
- Knowledge of your company's information management business rules, business requirements, and existing business processes.

### Audience

---

This course is intended for Business Administrators, System Administrators, and project team leaders. Implementation team members, including user adoption team members, and those with general Pro/INTRALINK administration responsibilities will also benefit from taking this course.

### Topics

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- Planning and creating user accounts and groups.
  - Planning and creating information storage locations: Products and Libraries.
  - Planning and configuring data management access control policies.
  - Planning and implementing data management templates.
  - Planning and configuring user notification of system events.
  - Managing data development and business processes through life cycles.
  - Configuring Pro/ENGINEER integration.
  - Administering new designs.
  - Working with Pro/INTRALINK administration support tools.
  - Identify new user and administration preferences.
  - Enable packages and administer package roles.
  - Configure new object relationships.
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- Move objects between organizations and contexts.

## Table of Contents

|            |  |
|------------|--|
| Module 1   | Introduction to Pro/INTRALINK 9.0 Business Administration        |
| Module 2   | Managing Principals  |
| Module 3   | Managing Object Types and Attributes                             |
| Module 4   | Managing Contexts  |
| Module 5   | Automating Processes Using Life Cycles                           |
| Module 6   | Managing Domain Policies and Access Control                      |
| Module 7   | Managing Teams   |
| Module 8   | Managing Object Type Behavior                                    |
| Module 9   | Configuring Pro/ENGINEER for Windchill                           |
| Module 10  | Administering New Designs in Windchill                           |
| Module 11  | Administrative Support Tools                                     |
| Module 12  | Administering Pro/INTRALINK and Testing the Business Environment |
| Appendix A | Windchill 9.1 Business Administration Enhancements               |

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## Migrating Pro/INTRALINK 3.4 Data to Windchill 9.0

|               |               |
|---------------|---------------|
| Course Code   | TRN-WBT2160-S |
| Course Length | 16 Hours      |

### Overview

In this course, you will learn how to perform a production migration from Pro/INTRALINK 3.x to the Windchill™ architecture. You will also learn how to conduct a migration effort properly, including planning, preparing the systems for migration, practicing the migration, and conducting the production migration. Lastly, you will discuss post migration tasks.

At the end of the course, a Pro/FICIENCY skills assessment will be used to reinforce your understanding of the course topics.

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

### Prerequisites

- You must be a system administrator for a production Pro/INTRALINK 3.x system at their site.
- You must have taken one of the following courses:
  - Pro/INTRALINK 8.0 Business Administration
  - Pro/INTRALINK 9.0 Business Administration
  - PDMLink 8.0 Business Administration
  - PDMLink 9.0 Business Administration

### Audience

This course is designed for customers who have chosen to lead a migration from Pro/INTRALINK 3.x to one of the following products:

- Pro/INTRALINK 8.0 or 9.0.
- Windchill PDMLink 8.0 or 9.0.

Note: This class is primarily for migrations to Windchill 9.0. However, if you are migrating to Windchill 8.0, all the skills learned in this course are relevant. Demonstrations and labs will be based upon Windchill 9.0, but all skills learned are easily applied to Windchill 8.0.

### Topics

- Overview of the Migration Process
- Planning a Migration
- Preparing the Source and Target Systems for Migration
- Installing the Pro/INTRALINK Data Migrator
- Identifying and Resolving Data Conflicts
- Performing a Rehearsal Migration
- Performing a Production Migration
- Migrating WTParts (Migrations to Windchill PDMLink only)

## Table of Contents

|          |  |
|----------|--|
| Module 1 | Process Overview                           |
| Module 2 | Planning a Migration                       |
| Module 3 | Preparing the Systems for Migration        |
| Module 4 | Installing the Pro/INTRALINK Data Migrator |
| Module 5 | Data Mapping                               |
| Module 6 | Identifying and Resolving Conflicts        |
| Module 7 | Conducting a Full Migration                |
| Module 8 | Migrating WTParts to PDMLink               |

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## Pro/INTRALINK 9.0 - Application Orientation

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|---------------|-------------|
| Course Code   | SAB-CEK2486 |
| Course Length | 3 Hours     |

### Overview

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In this Pro/INTRALINK 9.0 – Application Orientation course, you will learn basic skills required to access and view information, such as: logging on, accessing help, and locating and viewing product information.

After finishing the course, you will complete Pro/FICIENCY skills assessment questions. These questions are used to help reinforce your understanding of the course topics.

### Prerequisites

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

### Audience

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This course is intended for any user that needs to access product information residing within the Pro/INTRALINK system.

### Topics

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- Introduction to the Pro/INTRALINK Environment
  - Locating Information
  - Viewing Information
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## Table of Contents

|          |   |
|----------|---|
| Module 1 | Introduction to the Pro/INTRALINK Environment |
| Module 2 | Locating Information                          |
| Module 3 | Viewing Information                           |

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## Pro/INTRALINK 9.0 - Pro/ENGINEER Data Management

|               |             |
|---------------|-------------|
| Course Code   | SAB-CEK2487 |
| Course Length | 6 Hours     |

### Overview

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In this Pro/INTRALINK 9.0 – Pro/ENGINEER Data Management course, you will learn the key capabilities and features of Pro/INTRALINK CAD Data Management and how to use Pro/INTRALINK to manage Pro/ENGINEER design information. Specifically, you will focus on the day-to-day data management tasks required by the Pro/ENGINEER user community.

After finishing the course, you will complete Pro/FICIENCY skills assessment questions. These questions are used to help reinforce your understanding of the course topics.

### Prerequisites

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- Basic understanding of Pro/ENGINEER functionality.
- Completion of Pro/INTRALINK 9.0 – Application Orientation.

### Audience

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This course is intended for end users that generate design information in Pro/ENGINEER and need to manage the CAD data in a Windchill environment.

### Topics

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- Getting Started with Pro/ENGINEER Data Management
  - Initiating New Designs and Sharing Design Information
  - Modifying and Managing Design Information
  - Understanding File Relationships and Dependencies
  - Managing Family Tables
  - Managing the Workspace Environment
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## Table of Contents

|          |   |
|----------|---|
| Module 1 | Getting Started with Pro/ENGINEER Data Management     |
| Module 2 | Initiating New Designs and Sharing Design Information |
| Module 3 | Modifying and Managing Design Information             |
| Module 4 | Understanding File Relationships and Dependencies     |
| Module 5 | Managing Family Tables                                |
| Module 6 | Managing the Workspace Environment                    |

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## Pro/INTRALINK 9.0 - Standard Document Management

|               |             |
|---------------|-------------|
| Course Code   | SAB-CEK2488 |
| Course Length | 1 Hour      |

### Overview

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In this Pro/INTRALINK 9.0 - Standard Document Management course, you will learn how to use standard documents or document objects to store and manage non-Pro/ENGINEER files. You will learn multiple methods of how to create document objects, how to establish document relationships, and the process for modifying document objects.

After finishing the course, you will complete Pro/FICIENCY skills assessment questions. These questions are used to help reinforce your understanding of the course topics.

### Prerequisites

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- Completion of Pro/INTRALINK 9.0 – Application Orientation.

### Audience

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This course is intended for any user that will manage documents or non-Pro/ENGINEER files within Pro/INTRALINK.

### Topics

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- Managing Standard Documents
-

## Table of Contents

|          |                             |
|----------|-----------------------------|
| Module 1 | Managing Standard Documents |
|----------|-----------------------------|

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## Pro/INTRALINK 9.0 - Work Environment Management

|               |             |
|---------------|-------------|
| Course Code   | SAB-CEK2489 |
| Course Length | 2 Hours     |

### Overview

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In this Pro/INTRALINK 9.0 - Work Environment Management course, you will learn the basic skills necessary to manage your work environment within Pro/INTRALINK. You will also learn how to effectively manage and complete tasks assigned to you.

After finishing the course, you will complete Pro/FICIENCY skills assessment questions. These questions are used to help reinforce your understanding of the course topics.

### Prerequisites

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- Completion of Pro/INTRALINK 9.0 – Application Orientation
- Completion of one of the following:
  - Pro/INTRALINK 9.0 – Pro/ENGINEER Data Management
  - Pro/INTRALINK 9.0 – Standard Document Management

### Audience

---

This course is intended for any user that will create and manage objects within Pro/INTRALINK, and participate in life cycle processes of those objects.

### Topics

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- Participating in Processes
  - Managing Your Work
-

## Table of Contents

|          |                            |
|----------|----------------------------|
| Module 1 | Participating in Processes |
| Module 2 | Managing Your Work         |

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## Pro/INTRALINK 9.1 - Windchill 9.1 Enhancements and New Functionality

|               |             |
|---------------|-------------|
| Course Code   | SAB-CEK2932 |
| Course Length | 1 Hour      |

### Overview

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In this module, you will learn about Windchill 9.1 enhancements. After completing this module, you will be well prepared to configure some of the latest enhancements to your Windchill application.

After completing this course, you will be able to:

- Use Windchill table enhancements.
- Use multi-object manipulation capability.
- Use packages.
- Modify non-latest objects.
- Identify security labels.

### Prerequisites

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- Basic browser and Web navigation skills
- Basic understanding of product development processes and deliverables
- SAB-CEK2486 Pro/INTRALINK 9.0 – Application Orientation

### Audience

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This course is intended for any user of Pro/INTRALINK 9.1.

### Topics

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- Use Windchill table enhancements.
  - Use multi-object manipulation capability.
  - Use packages.
  - Modify non-latest objects.
  - Identify security labels.
-

## Table of Contents

|          |  |
|----------|--|
| Module 1 | Windchill 9.1 Enhancements and New Functionality |
|----------|--|

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## ProductView 9.0 – Application Orientation

|               |             |
|---------------|-------------|
| Course Code   | SAB-CEK2506 |
| Course Length | 3 Hours     |

### Overview

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ProductView is the primary means to visualize data within PDMLink, ProjectLink, and Pro/INTRALINK. In this course, you will learn about the capabilities of the ProductView 9.0 standard client. You will learn how to launch ProductView from PDMLink though this same skill can also be applied to ProjectLink or Pro/INTRALINK. You will also learn how to use ProductView's capabilities on 3-D models and 2-D drawings. Finally, you will learn how to collaborate online in real-time using ProductView.

After you finish this course, you will complete Pro/FICIENCY skills assessment questions. These questions are used to help reinforce your understanding of the course topics.

After completing this course, you will be able to:

- Identify visualization concepts.
- Define enterprise visualization use-case scenarios.
- Identify components in PTC's visualization system.
- Define the visualization workflow.
- Start ProductView from PDMLink.
- Identify components of the ProductView interface.
- Identify readable file types.
- Identify Product's basic and advanced capabilities.
- Apply ProductView's basic capabilities on CAD models and drawings.
- Define ProductView's collaboration methodology.
- Start an "ad hoc" collaboration session.
- Manage a collaboration session.

### Prerequisites

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- Basic browser and Web navigation skills.
- Basic understanding of product development processes and deliverables.
- Introduction to Windchill PDMLink 9.0 or
- Introduction to Windchill ProjectLink 9.0

### Audience

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This course is intended for any user that will view data stored within Windchill ProjectLink, Windchill PDMLink, or Pro/INTRALINK using the ProductView standard client.

### Topics

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- Identifying visualization concepts
  - Defining enterprise visualization use-case scenarios
  - Identifying components in PTC's visualization system
  - Defining the visualization workflow
-

- Starting ProductView from PDMLink
  - Identifying components of the ProductView interface
  - Identifying readable file types
  - Identifying Product's basic and advanced capabilities
  - Applying ProductView's basic capabilities on CAD models and drawings
  - Defining ProductView's collaboration methodology
  - Starting an "ad hoc" collaboration session
  - Managing a collaboration session
-

## Table of Contents

|          |                                       |
|----------|---------------------------------------|
| Module 1 | Introduction to Visualization         |
| Module 2 | Introduction to ProductView           |
| Module 3 | Collaborating Online with ProductView |

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## ProductView 9.0 - Annotations and Sectioning

|               |             |
|---------------|-------------|
| Course Code   | SAB-CEK2507 |
| Course Length | 3 Hours     |

### Overview

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In this course, you will learn several different methods to create construction geometry. Construction geometry is useful when measuring distances, sectioning models, creating mark-ups, and creating constraints. You will learn how to create annotation sets within a PDM system, such as Windchill PDMLink or Windchill ProjectLink. You will also learn how to retrieve the annotation sets from the PDM system. Creating annotations is an important method for communicating design intent and design changes throughout the enterprise. Finally, you will learn advanced sectioning methods in ProductView. These methods enable you to easily create cross-sections of your models so that you can visualize internal components as well as profiles of the cut components.

After you finish this course, you will complete Pro/FICIENCY skills assessment questions. These questions are used to help reinforce your understanding of the course topics.

After completing this course, you will be able to:

- Create construction points, axes, planes, and orientation frames.
- Set the pick target.
- Create annotation sets.
- Save annotation sets to a PDM system.
- Retrieve annotation sets from a PDM system.
- Section an assembly.
- Manipulate the section view.
- Set specific components to be sectioned.
- Create quarter-cut sections.

### Prerequisites

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- Basic browser and Web navigation skills.
- Basic understanding of product development processes and deliverables.
- SAB-CEK2506 ProductView 9.0 – Application Orientation or its equivalent.

### Audience

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This course is intended for any user that needs a more complete understanding of sectioning models and/or creating annotations.

### Topics

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- Creating construction points, axes, planes, and orientation frames
  - Setting the pick target
  - Creating annotation sets
  - Saving annotation sets to a PDM system
  - Retrieving annotation sets from a PDM system
-

- Sectioning an assembly
  - Manipulating the section view
  - Setting specific components to be sectioned
  - Creating quarter-cut sections
-

## Table of Contents

|          |                                |
|----------|--------------------------------|
| Module 1 | Creating Construction Geometry |
| Module 2 | Creating Annotations           |
| Module 3 | Sectioning Models              |

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## Windchill 9.0/9.1 System Administration

|               |             |
|---------------|-------------|
| Course Code   | SAB-CEK2728 |
| Course Length | 11 Hours    |

### Overview

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In this course, you will learn how to install and configure Windchill system components, including PDMLink and ProjectLink. You will learn how to perform routine Windchill system administration tasks including how to shut down and start Windchill services, conduct performance testing, and tune up Windchill components for performance. You will also learn how to manage a distributed system environment and plan and run basic backup and recovery procedures. Other topics include managing system performance with Oracle 10g, managing memory and CPU allocation, troubleshooting background queues, and monitoring firewall activity and security.

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

At the end of each module, you will complete Pro/FICIENCY skills assessment questions. These questions are used to help reinforce your understanding of the course topics and form the basis for review of any topics, if necessary.

After completing the course, you will be prepared to complete basic Windchill PDMLink tasks and activities, as well as have a better understanding of the Windchill PDMLink system implementation at your company.

### Prerequisites

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- Familiarity with the Windchill PDMLink 9.0/9.1 or Windchill ProjectLink 9.0/9.1 user interface.
- Familiarity with the Windows command prompt and the ability to form and execute basic SQL statements.

### Audience

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This training course is intended for System Administrators and Application Developers.

### Topics

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- Identifying Windchill System Components
  - Installing Windchill Components
  - Performance Testing
  - External File Storage
  - Data Replication
  - Workflow Performance Tuning
  - Database Performance Tuning
  - System Backup and Recovery
  - Windchill Infrastructure Security
  - Windchill 9.1 System Administration Enhancements
-

## Table of Contents

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|------------|--|
| Module 1   | Identifying Windchill System Components          |
| Module 2   | Installing Windchill Components                  |
| Module 3   | Managing Windchill Services                      |
| Module 4   | Performance Testing                              |
| Module 5   | External File Storage                            |
| Module 6   | Data Replication                                 |
| Module 7   | Tuning Application Server                        |
| Module 8   | Tuning Workflow Processes                        |
| Module 9   | Oracle Performance Tuning                        |
| Module 10  | Windchill Backup and Recovery                    |
| Module 11  | Windchill Infrastructure Security                |
| Appendix A | Windchill 9.1 System Administration Enhancements |

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## Pro/INTRALINK 9.0 Business Administration - Business Environment Administration

|               |             |
|---------------|-------------|
| Course Code   | SAB-CEK2810 |
| Course Length | 21 Hours    |

### Overview

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Pro/INTRALINK 9.0 is designed to help designers and manufacturers control design information and manage the processes associated with product development. In this course, you will learn how to perform basic Pro/INTRALINK 9.0 administration tasks to configure and manage the business environment. You will learn how to plan and create user accounts and groups, and how to plan and create information management storage strategies. Other topics include life cycles, teams, and configuring domain policies. These skills are important because they enable a Business Administrator to configure Pro/INTRALINK to meet business needs. This course does not cover Pro/ENGINEER data administration topics.

At the end of each module you will complete Pro/FICIENCY skills assessment questions. These questions are used to help reinforce your understanding of the course topics and form the basis for daily review sessions.

After completing the course, you will be well prepared to set up and manage a basic Pro/INTRALINK implementation at your company.

### Prerequisites

---

- Introduction to Pro/INTRALINK 9.0 instructor-led training course.
- Knowledge of your company's information management business rules, business requirements, and existing business processes.

### Audience

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This course is intended for Business Administrators, System Administrators, and project team leaders. Implementation team members, including user adoption team members, and those with general Pro/INTRALINK administration responsibilities will also benefit from taking this course.

### Topics

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- Planning and creating user accounts and groups.
  - Planning and creating information storage locations: Products and Libraries.
  - Planning and configuring data management access control policies.
  - Planning and implementing data management templates.
  - Planning and configuring user notification of system events.
  - Managing data development and business processes through life cycles.
  - Working with Pro/INTRALINK administration support tools.
-

## Table of Contents

|           |  |
|-----------|--|
| Module 1  | Introduction to Pro/INTRALINK 9.0 Business Administration        |
| Module 2  | Managing Principals  |
| Module 3  | Managing Object Types and Attributes                             |
| Module 4  | Managing Contexts  |
| Module 5  | Automating Processes Using Life Cycles                           |
| Module 6  | Managing Domain Policies and Access Control                      |
| Module 7  | Managing Teams   |
| Module 8  | Managing Object Type Behavior                                    |
| Module 9  | Administrative Support Tools                                     |
| Module 10 | Administering Pro/INTRALINK and Testing the Business Environment |

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## Pro/INTRALINK 9.0 Business Administration - Pro/ENGINEER Data Administration

|               |             |
|---------------|-------------|
| Course Code   | SAB-CEK2811 |
| Course Length | 3 Hours     |

### Overview

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Pro/INTRALINK 9.0 is designed to help designers and manufacturers control design information and manage the processes associated with product development. In this course, you will learn how to perform basic Pro/INTRALINK 9.0 administration tasks to manage Pro/ENGINEER data in Windchill. You will learn how to configure Pro/ENGINEER integration and how to create design templates. This course does not cover business environment administration topics.

At the end of each module you will complete Pro/FICIENCY skills assessment questions. These questions are used to help reinforce your understanding of the course topics and form the basis for daily review sessions.

After completing the course, you will be well prepared to set up and manage Pro/ENGINEER data in Windchill at your company.

### Prerequisites

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- Introduction to Pro/INTRALINK 9.0 instructor-led training course OR Introduction to Windchill PDMLink 9.0 instructor-led training course.
- Windchill PDMLink 9.0 Business Administration instructor-led training course.
- Knowledge of your company's information management business rules, business requirements, and existing business processes.

### Audience

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This course is intended for Business Administrators, System Administrators, and project team leaders. Implementation team members, including user adoption team members, and those with general Pro/ENGINEER data administration responsibilities in a Windchill Application will also benefit from taking this course.

### Topics

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- Configuring Pro/ENGINEER integration.
  - Administering new designs.
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## Table of Contents

|          |  |
|----------|--|
| Module 1 | Configuring Pro/ENGINEER for Windchill |
| Module 2 | Administering New Designs in Windchill |

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## Pro/INTRALINK 9.0 - System Orientation

|               |             |
|---------------|-------------|
| Course Code   | SAB-CEK2812 |
| Course Length | 4 Hours     |

### Overview

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In this Pro/INTRALINK 9.0 – System Orientation course, you will learn basic skills required to access and view information, such as: logging on, accessing help, and locating and viewing information. You will also learn about Pro/INTRALINK basic architecture, administrative terminology, data management in the Pro/INTRALINK business environment, and the steps required to plan an implementation of Pro/INTRALINK 9.0 at your company.

After finishing the course, you will complete Pro/FICIENCY skills assessment questions. These questions are used to help reinforce your understanding of the course topics.

In this course, you will learn how to:

- Describe the essential elements and benefits of Pro/INTRALINK.
- Log on to Pro/INTRALINK and navigate within its interface.
- Locate and view product information within Pro/INTRALINK.
- Annotate visualization representations of products.
- Understand basic Pro/INTRALINK 9.0 component architecture and terminology.
- Explain the role of the Business Administrator.
- Identify the data to be managed.
- Understand the processes involved in defining your company’s business environment.
- Plan the implementation strategy for your business environment.

### Prerequisites

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- Basic browser and Web navigation skills.

### Audience

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This course is intended for System Administrators.

### Topics

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- Introduction to the Pro/INTRALINK Environment
  - Locating Information
  - Viewing Information
  - Introduction to Pro/INTRALINK 9.0 Business Administration
-

## Table of Contents

|          |   |
|----------|---|
| Module 1 | Introduction to the Pro/INTRALINK Environment             |
| Module 2 | Locating Information                                      |
| Module 3 | Viewing Information                                       |
| Module 4 | Introduction to Pro/INTRALINK 9.0 Business Administration |

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## Pro/INTRALINK 9.1 Business Administration - Enhancements and New Functionality

|               |             |
|---------------|-------------|
| Course Code   | SAB-CEK2935 |
| Course Length | 1 Hour      |

### Overview

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In this course, you will learn about new features in Pro/INTRALINK 9.1 and how to perform basic administration tasks. You will learn about Windchill 9.1 user and administrative preferences, how to enable packages and administer package roles, and how to configure new object relationships. You will also learn how to use the administrative move action to move objects between organizations and contexts.

After completing the course, you will be well prepared to set up and manage a basic Pro/INTRALINK 9.1 implementation at your company.

### Prerequisites

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- Knowledge of your company's information management business rules, business requirements, and existing business processes.
- One of the following two options
  1. Pro/INTRALINK 9.0 Business Administration instructor-led training course.
  2. Windchill PDMLink 9.0 Business Administration instructor-led training course, AND Pro/INTRALINK 9.0 Business Administration – Pro/ENGINEER Data Administration Web-based training course.

### Audience

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This course is intended for Business Administrators, System Administrators, and project team leaders. Implementation team members, including user adoption team members, and those with general Pro/INTRALINK administration responsibilities will also benefit from taking this course. This course consists of a single addendum module designed as a Windchill 9.1 update for Windchill PDMLink 9.0 or Pro/INTRALINK 9.0 business administrators.

### Topics

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- Identify new user and administration preferences
  - Enable packages and administer package roles
  - Configure new object relationships
  - Move objects between organizations and contexts
-

## Table of Contents

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|------------|--|
| Appendix A | Windchill 9.1 Business Administration Enhancements |
|------------|--|

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## Migrating Pro/INTRALINK 3.4 Data to Windchill 9.0

|               |             |
|---------------|-------------|
| Course Code   | SAB-CEK2751 |
| Course Length | 16 Hours    |

### Overview

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In this course, you will learn how to perform a production migration from Pro/INTRALINK 3.x to the Windchill™ architecture. You will also learn how to conduct a migration effort properly, including planning, preparing the systems for migration, practicing the migration, and conducting the production migration. Lastly, you will discuss post migration tasks.

At the end of the course, a Pro/FICIENCY skills assessment will be used to reinforce your understanding of the course topics.

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

### Prerequisites

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- You must be a system administrator for a production Pro/INTRALINK 3.x system at their site.
- You must have taken one of the following courses:
  - Pro/INTRALINK 8.0 Business Administration
  - Pro/INTRALINK 9.0 Business Administration
  - PDMLink 8.0 Business Administration
  - PDMLink 9.0 Business Administration

### Audience

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This course is designed for customers who have chosen to lead a migration from Pro/INTRALINK 3.x to one of the following products:

- Pro/INTRALINK 8.0 or 9.0.
- Windchill PDMLink 8.0 or 9.0.

Note: This class is primarily for migrations to Windchill 9.0. However, if you are migrating to Windchill 8.0, all the skills learned in this course are relevant. Demonstrations and labs will be based upon Windchill 9.0, but all skills learned are easily applied to Windchill 8.0.

### Topics

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- Overview of the Migration Process
  - Planning a Migration
  - Preparing the Source and Target Systems for Migration
  - Installing the Pro/INTRALINK Data Migrator
  - Identifying and Resolving Data Conflicts
  - Performing a Rehearsal Migration
  - Performing a Production Migration
  - Migrating WTParts (Migrations to Windchill PDMLink only)
-

## Table of Contents

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|----------|--|
| Module 1 | Process Overview                           |
| Module 2 | Planning a Migration                       |
| Module 3 | Preparing the Systems for Migration        |
| Module 4 | Installing the Pro/INTRALINK Data Migrator |
| Module 5 | Data Mapping                               |
| Module 6 | Identifying and Resolving Conflicts        |
| Module 7 | Conducting a Full Migration                |
| Module 8 | Migrating WTParts to PDMLink               |

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