

# Table of Contents

<b>Introduction and Definitions .....</b>	<b>1</b>
Objective of this Textbook .....	1
Textbook Outline .....	2
Textbook Conventions .....	3
Introduction to Pro/INTRALINK .....	4
Definitions .....	5
Capabilities of Pro/INTRALINK .....	7
Pro/INTRALINK and Pro/ENGINEER Object Reference .....	8
Pro/INTRALINK System Architecture .....	9
Intralink Administration Usernames and Passwords .....	10
Data Server Information .....	11
Multi-Server Configuration .....	12
Components of the Pro/INTRALINK Client .....	13
The Intralink Client Menu .....	13
Intralink Objects .....	14
Login / Logout .....	15
The Commonsplace .....	16
The Workspace .....	17
Linked Session of Pro/ENGINEER .....	17
Locating Objects .....	18
Preferences and Defaults .....	18
Administration Tasks .....	18
Purge .....	18
RTP Forms .....	18
Intralink Object Attributes .....	19
<b>Installing the File Server .....</b>	<b>22</b>
Prepare for the Installation .....	22
Installing the File Server .....	23
Define the Installation Folder .....	24
Initiate the File Server Installation .....	25
Start the Intralink File Server Service .....	25
Complete the File Server Installation .....	26
<b>Installing Java Runtime Environment .....</b>	<b>27</b>
Initiate the Installation .....	27
Complete the Installation .....	28
<b>Installing Oracle .....</b>	<b>29</b>
Introduction .....	29
Start the NT LM Security Support Provider Service .....	30
Define the OSA Installation Folder .....	31
Initiate the OSA Installation .....	32
Insert the Oracle Disks .....	33
Insert the Oracle Patch Disk .....	34
Complete the OSA Installation .....	35

<b>Installing the Data Server .....</b>	<b>36</b>
Introduction.....	36
Define the Installation Folder .....	37
Define the Database Size and Location.....	38
Specify the File Vault Information .....	39
Optional Installation Steps .....	40
Define the Oracle System Administrator Password.....	41
Define the Server Type and Initiate the Installation .....	42
Installation Progress Report.....	43
Installation Issues.....	44
Complete the Installation.....	45
<b>Installing the Client Software .....</b>	<b>46</b>
Introduction.....	46
Define the Installation Folder .....	47
Define the Data Server.....	48
Specify the License Server .....	49
Set the Windows Preferences.....	50
Optional Installation Steps .....	51
License Configuration .....	52
Pro/ENGINEER Interoperability .....	53
Define the Help Files Location and Browser.....	54
Complete the Client Installation .....	55
<b>Data Server Management Utility .....</b>	<b>56</b>
Introduction.....	56
The Data Server Management Utility Menu .....	57
Starting the Data Server.....	58
Starting the Data Server (continued) .....	59
Login to the Data Server .....	60
Login to the File Server .....	61
Resize the Database.....	62
Export the Data Server Metadata.....	63
Importing an Oracle Dump File .....	64
DSMU Reports .....	65
Creating Additional File Servers.....	67
Creating Additional File Vaults .....	68
Moving a File Vault.....	69
Moving a File Vault (continued).....	70
Removing File Vaults .....	71
Removing File Servers .....	72
Database Backup Utility .....	73
Print the DSMU Window .....	74
<b>Intralink Client Administration .....</b>	<b>75</b>
Introduction.....	75
Administration Categories .....	76
Administration Categories (continued).....	77
<b>File Vaults and Storage Clusters .....</b>	<b>78</b>
Introduction.....	78

File Vaults.....	79
Storage Clusters.....	80
Adding File Vaults to Storage Clusters .....	81
<b>Users and Groups .....</b>	<b>82</b>
Introduction.....	82
Adding Users.....	83
User Passwords and Email Addresses.....	84
Creating Groups.....	85
Users and Groups .....	86
Administration Authorization .....	87
Exercise 1 – Create Users and Groups .....	88
<b>Roles .....</b>	<b>97</b>
Introduction.....	97
Default Roles.....	98
Role Action Descriptions .....	99
Object Actions .....	100
Folder Actions .....	101
Creating a New Role .....	102
Exercise 2 – Roles .....	103
<b>Revision Sequence.....</b>	<b>107</b>
Introduction.....	107
Exporting Revision Sequences .....	108
Importing Revision Sequences .....	109
Exercise 3 – Creating a Revision Sequence.....	110
<b>Release Schemes and Levels .....</b>	<b>113</b>
Introduction.....	113
Creating a New Release Scheme .....	114
Creating Release Levels .....	115
Changing a Release Scheme .....	116
Exercise 4 – Creating a Release Scheme .....	117
<b>Release Procedures .....</b>	<b>121</b>
Introduction.....	121
Creating a New Release Procedure.....	122
Adding Voters.....	123
Notification and Distribution Lists .....	124
Email Server Setup .....	125
Exercise 5 – Creating a Release Procedure.....	126
<b>Folders.....</b>	<b>134</b>
Introduction.....	134
The Commonsplace Folder Structure .....	135
Creating Folders.....	136
Folder Authorizations .....	137
The Folder Authorization Table.....	138
Setting Folder Authorizations .....	139
Setting Folder Authorizations (continued).....	140
Assigning Release Procedures .....	141

## Pro/INTRALINK 3.4 Administration Guide

Folder Attributes .....	142
Folder Replication .....	143
Modifying a Folder.....	144
Moving a Folder.....	145
Exercise 6 – Folders .....	146
<b>History Tracks.....</b>	<b>153</b>
Introduction.....	153
Creating History Tracks.....	154
Disabling History Tracks .....	155
Deleting History Tracks .....	156
<b>Triggers .....</b>	<b>157</b>
Introduction.....	157
Facts About Triggers .....	158
Trigger Examples .....	158
Trigger Definition .....	159
Registering a Trigger.....	160
Deactivating a Trigger .....	161
Deleting a Trigger.....	161
<b>Object Types .....</b>	<b>162</b>
Introduction.....	162
Defining an Object Type.....	163
Application Startup Command Syntax .....	164
Keyword Descriptions .....	165
Deleting an Object Type.....	166
<b>Dependency Configuration .....</b>	<b>167</b>
Introduction.....	167
Default Dependency Configurations .....	168
Dependency Configuration Files .....	168
Dependency Configuration Rule Syntax .....	169
Importing Dependency Configuration Files .....	171
Exporting Dependency Configuration Files.....	172
<b>Intralink Attributes.....</b>	<b>173</b>
Introduction.....	173
Attribute Types .....	174
Object Attributes.....	175
Creating Object Attributes .....	176
Attribute Authorization .....	177
Creating Folder Attributes .....	178
Creating User Attributes.....	179
Modifying Attributes.....	180
Deleting Attributes .....	181
Indexing Attributes.....	182
Exercise 7 – Creating Attributes.....	183
<b>System-Wide Preferences .....</b>	<b>186</b>
Introduction.....	186
Check In Preferences.....	187

Check In Preferences (continued).....	188
Checkout Preferences.....	189
Checkout Preferences (continued).....	189
Promote/Demote Preferences.....	191
Configuration Preferences .....	192
Application Behavior Preferences .....	193
Replicas Preferences .....	185
Parts Link Preferences.....	196
Exercise 8 – System-Wide Preferences.....	197
<b>Locate Objects.....</b>	<b>203</b>
Introduction.....	203
The Locate Browser Window .....	204
The Locate Browser Window (continued) .....	205
Searching for Objects.....	206
Saving Searches .....	208
Using a Saved Search to find Objects .....	209
Redefining a Saved Search .....	209
Deleting a Saved Search .....	209
Using Search Results.....	210
Exercise 9 – Locate Objects .....	211
<b>Purge Objects .....</b>	<b>216</b>
Introduction.....	216
Defining the Purge Criteria .....	217
Defining the Purge Criteria (continued).....	218
Saving Purge Criteria .....	219
Verify the Purge Criteria.....	220
Purge Conflicts.....	221
Execute the Purge.....	221
<b>Storage Cluster Replication .....</b>	<b>222</b>
Introduction.....	222
Multi-Site Setup .....	223
Replicating a Storage Cluster .....	224
Replicating a Storage Cluster (continued) .....	225
Replication Preferences .....	226
Updating a Replicated Storage Cluster.....	226
Using a Command Line for Replication Tasks.....	227
<b>Package Replication.....</b>	<b>228</b>
Introduction.....	228
Identifying the Source and Target Data Servers.....	229
Enable Package Replication .....	230
Replication Preferences .....	234
Distribution Roles .....	235
Assigning Distribution Roles .....	236
Creating a Package.....	237
Creating a Package (continued).....	238
Publishing a Package.....	239
Publishing a Package (continued).....	240
Subscribing to a Package .....	241

## Pro/INTRALINK 3.4 Administration Guide

Subscription Conflicts.....	241
Rejecting a Package .....	242
Deleting a Package .....	242
Maintaining Package Replication .....	243
Using the Registry .....	244
Using the Registry (continued).....	245
Using the Registry (continued).....	246
<b>About the Author .....</b>	<b>247</b>
<b>Index .....</b>	<b>248</b>