



Agile PLM 9.3 New Features Quick Overview

Part No. E15274-01

Agile 9.3 introduces -

- a significant upgrade in Web Client capabilities,
- several enhancements to core PLM use cases like Attribute Change Management,
- an expansion of automation capability for the entire platform through the addition of Event triggers, scripting through Groovy, and flexible notifications,
- new custom UI and process integration potential through out of the box Web Services, and
- a more consistent user interface throughout all Agile PLM modules

All of these 9.3 features lead to an easier to deploy, complete PLM solution.

The features of 9.3 provide a compelling reason for customers to upgrade by offering dramatic productivity improvements for all users while maintaining familiar Agile PLM user interface elements. The expansion of training potential through Oracle UPK support, video Quick Tours, and extensive free training via recorded transfer of information (TOI) sessions, will help users quickly acclimate to the updated Web Client to reach maximum productivity. Agile PLM 9.3 also fully embraces the Oracle Complete, Open, and Integrated enterprise model which allows our customers to leverage Oracle Middleware to maximize the potential of PLM in the enterprise.

This document addresses new capabilities added in 9.3 when compared to Agile PLM 9.2.2.4.

NOTE: This document is a supplement to the release Readme and other manuals, like the Capacity Planning Guide. It is intended to be a supplement to the other material and does not replace the need to read and understand those documents.

Table of Contents

1	Agile PLM 9.3 Resources at Oracle	2
2	Features in Agile PLM 9.3	3
2.1	User Experience and Training	3
2.2	Enhanced PLM Use Cases.....	4
2.3	Automation	5
2.4	Web Services	6
2.5	Platform.....	7
3	Specific Impact of Agile PLM 9.3 on PLM Modules	8
3.1	Product Portfolio Management	8
3.2	Product Governance and Compliance.....	8
3.3	Product Cost Management	8
3.4	Product Quality Management.....	8

1 Agile PLM 9.3 Resources at Oracle

Oracle offers extensive training and documentation for customers to learn about Agile PLM 9.3. Below is a list of resources which can be leveraged:

- Agile PLM Solution Factory: <http://www.oracle.com/goto/plmsolutionspace>
- Agile PLM blog: <http://blogs.oracle.com/PLM>
- Twitter: <http://twitter.com/agileplm>
- Software download from Oracle Edelivery: <http://edelivery.oracle.com/>
- Documentation at OTN (Oracle Technology Network):
<http://www.oracle.com/technology/documentation/agile.html>
- Samples available at: <http://samplecode.oracle.com/>
 - Note: this site is in the process of being launched
- Agile PLM Fusion Middleware (FMW) Best Practice Center:
<http://www.oracle.com/technology/tech/fmw4apps/agile/index.html>
 - Note: this site is in the process of being launched
- Support through Metalink: <https://metalink.oracle.com/>
 - The first Service Pack on 9.3.0 should be posted to Oracle Support approximately 4-6 months after initial release, and then Service Packs will be posted each 3-6 months after that depending on customer needs.
 - Oracle Service Packs are planned to address defects and not add new features
- Transfer of Information Recordings available through Metalink: <https://metalink.oracle.com/>
 - These are recording of Agile PLM Product Managers discussing the major new features of Agile PLM 9.3. They are available to any customer with licenses and support for Agile PLM.
- Agile PLM Community Page available through Metalink or at <https://communities.oracle.com/>
 - In Metalink, select Community link in the top tab bar
 - On the top left side of the page, find or select “Agile PLM Product Lifecycle Management”
- External Yahoo! User Groups (note: content is not managed or controlled by Oracle)
 - <http://tech.groups.yahoo.com/group/WRAU/>
 - <http://tech.groups.yahoo.com/group/AgileAPI/>

2 Features in Agile PLM 9.3

Agile PLM 9.3 features fall into 4 main categories:

- User Experience and Training
- New and Enhanced PLM Use Cases
- Automation
- Web Services

This section will explore the features in these main categories. The next major section will discuss additional features by module.

2.1 User Experience and Training

Agile PLM 9.3 introduces new controls, components, and productivity features to drive dramatic reductions in time needed to complete tasks to support many PLM use cases. Please note that the addition of many of the features described in this section require web browser capabilities which are not available in Internet Explorer 6 (IE6), so IE6 clients cannot use Agile PLM 9.3.

- Direct Manipulation – features that allow users to complete tasks in a natural, efficient way which helps reduce errors
 - Type-ahead Searches and Auto Completion of data in List and Multilist fields
 - Administrators can configure any List to display as a search with Auto Completion
 - Table row entry
 - Inline table editing
 - Drag and Drop
 - Copy and Paste between tables
 - Enhanced fill-up and fill-down in tables
 - Keyboard shortcuts and navigation
- Immediate Access – features providing increased user efficiency by better access to primary content, controls, and components
 - Actionable Quick View (hover-over capabilities)
 - Floating search dialog available throughout PLM
 - Flexible Navigator
 - Filtering & Sorting on multiple columns in tables
 - Column Locking in tables
 - Global and Personal Views in tables with the ability to save preferences
 - Targeted Page Refresh (AJAX) when working on tables
 - Dynamic Pagination for long tables
 - BOM Expanded Display Windows
- Simplified Design - create consistency across Agile products for faster ROI
 - Top page redesign
 - Layering of elements to expose complexity as needed
 - Content is more prominent
 - Icon usage has been cut in half and variation in fonts, colors and other visual elements have been dramatically reduced
- Modernize code - xHTML 1.0 compliant

- Agile 9.3 declares and follows the XHTML 1.0 doc type
- Data transferred between Server and Client reduced by 30%
- Training support – help users learn Agile PLM 9.3 more quickly
 - Context Help through UPK
 - Video Quick Tours
 - Keyboard Shortcut Help page

2.2 Enhanced PLM Use Cases

These features are primarily focused on the core Product Record, including the modules Product Collaboration with Document Management and Engineering Collaboration along with Product Governance and Compliance

- Item Attribute Change Management
 - Ability to set Item attributes as Change Controlled, and then use Change Orders or Manufacturer Orders to redline Change Controlled attributes. Once the Change is released, the attribute values are written back to the Item while the Redlines are stored as a historical record.
 - Attribute History Report to show changes to Item Attributes across Changes
 - Attribute Comparison Report which enables comparison of Item Attributes between different Items
- Item Group Feature
 - Extend the Part Group base object by adding an Item Group option which can be used for Product Collaboration. A new field was added to Items to display related Item Groups.
- BOM Multilevel Comparison Report and Date Based BOM Explosion Report
 - The BOM Multilevel Comparison Report enables users to find the detailed differences between BOMs, including Manufacturer Parts and Attachments. It also allows the user to select the same BOM at different revisions and at different dates for a fixed-release date based BOM resolution.
 - The BOM Explosion Report has been enhanced to allow the user to select the Date of BOM resolution based on revision release date.
 - Both reports can be called through the SDK to retrieve the raw XML.
- Thumbnails on Items (Parts and Documents), Manufacturer Parts, and File Folders
 - Thumbnails (small pictures - <http://en.wikipedia.org/wiki/Thumbnails>) can be enabled for Items, Manufacturer Parts, and File Folders.
 - Thumbnails can display in tables (Search Results, BOM, Where Used, Structure, Attachments) and when looking at individual object Title Block and Quick View screens.
 - Thumbnail Navigator window can provide a simple graphical substitute for reviewing Attachments
 - Multiple thumbnails can be stored for Items and File Folders.
 - Agile PLM can automatically generate thumbnails from attachments using Oracle AutoVue for Agile or users can override the system generated thumbnail using a different image
- Agile Drive - Lightweight Doc Management with WebDAV
 - Agile Drive allows users to open, add, or delete Agile PLM attachments through their file browsers, like Windows Explorer or Mac Finder, while maintaining security through Agile PLM roles and privileges.
 - Nothing needs to be installed on the client
 - Does not support actions like Check Out or Check In

- New Engineering Collaboration framework with enhanced CAD integration capability through Web Services
 - Engineering Collaboration integration use cases are exposed through high-level Web Services and BPEL orchestrated services
 - EC partners will leverage core web services, EC web services, and customization capabilities of BPEL to deliver more robust and higher performing CAD integrations
 - “Load to CAD” command enables the use of the web client for CAD use cases
- Enhanced Smart URL Capabilities
 - Open a specific tab of an object
 - Open a search dialog
 - Open to a design comparison
 - Supports markup in viewer
 - Open a file (AutoVue for Agile or MIME-type application)
- AutoVue for Agile
 - AutoVue mobile support for offline view and markup
- Design Object Enhancements
 - Version-specific Relationships between Designs
 - Where-used queries for Designs
 - Design version purge capability
 - Design structure compare
- Signoff duration information on Workflow
 - Column on the Workflow tab showing the number of days since an approval was requested
 - Signoff Duration Report will show needed approvals across multiple objects
- Prohibit Comments on Approvals
 - Allows the administrator to block comments during the approval process
- Faster Compliance Rollup
 - Ability to schedule rollup for all shippable items or just for impacted shippable items.
- Tracking of Part’s compliance changes through History tab
 - Ability to quickly determine when a part’s compliance has changed
- Additional Feature Improvements:
 - Bulk Hard Delete from Recycle Bin
 - Configurable Timeout for Internal and Supplier Users in Administrator
 - Increased performance of Workflow Routing Tab by providing a Date filter
 - Direct entry of Dates and Short Date Feature for Web Client Display
 - More configuration control of field sizes when editing Title Block or Cover Page attributes (width and height definition)
 - Administrator configuration of enabled languages (when the Agile PLM 9.3 NLS version is shipping)

2.3 Automation

- Events
 - Events offers the ability to trigger process extensions or notifications due to normal user activities
 - There are extensive options to configure events and tie them to Process Extensions
 - User actions like Create, Save As, Update Title Block (save), and many more are available
- Notifications

- Ability to create new notifications which can be called from Events or from Process Extensions
- Enhanced flexibility to have Agile PLM notify users exactly when needed
- Scripting
 - Groovy scripting language with extensions to the SDK capabilities of Agile PLM which allows Process Extensions to be written directly in Administrator rather than compiled and added to the server file system
- Samples
 - Several samples will be provided with the release to demonstrate how to use Events, Notifications, and Scripting to automate Agile PLM to solve example use cases

2.4 Web Services

- Infrastructure
 - XML based Web Service Framework - Apache Axis 1.4
 - Support for standard SOAP 1.1/1.2 over HTTP(S) protocol
 - Support for standard WSDL1.1 ensures compatibility across various clients (.NET, Java, and BPEL)
 - Well defined standards based discoverable Interface
 - Modularized PLM Schema (XSD) and WSDL for easy maintenance
 - Batch APIs are used wherever applicable for better performance
 - Web Service versioning for backward compatibility
- Agile Core Web Services
 - Agile Core Web Services is a set of object and data level services: Business Objects, Collaboration, Meta data, Attachments, Search, Tables, Product Collaboration (PC) and Engineering Collaboration (EC)
 - Facilitate customers and partners to build casual user UI applications in Microsoft Office, Oracle Web Center (and ADF), Mobile, and SharePoint
 - Aid customers and Partners to build custom process integration to ERP, CRM and SCM systems
- Engineering Collaboration (EC) Services
 - EC Services is a set of “Business Web Services”
 - Supplements the Core Web Services for EC use cases
 - Includes BPEL Orchestrated services
 - Improves WAN performance of CAD connectors by combining EC use cases into high-level calls, thus reducing network transmissions
 - Facilitate customers and partners to build next generation CAD connectors using PLM Core and EC BPEL Orchestrated services
- UI Integration through PLM Core Services
 - Facilitate Casual user access to lightweight PLM functionality from MS Office, Oracle Web Center (and ADF) and Microsoft SharePoint
 - Allows customers and partners to build Mashups and portal dashboard by integrating highly heterogeneous set of services from CRM, PLM, ERP and SCM applications
 - Samples
 - Following samples will be provided with the release to demonstrate how to use Agile Web Services in Java and .Net environment
 - Lightweight document management in MS Word

- Load & Update BOM from Excel
- Load & Update Price data from Excel
- Load & Update Compliance data from Excel
- Sales RFQ UI in Mobile devices
- Simplified ECO Approval UI in Mobile devices
- Executive dashboard in Oracle Web Center and Microsoft SharePoint
- Lightweight document management in Oracle Web Center (and ADF)

2.5 Platform

- Key Platform Certification Changes
 - Application Server:
 - Updated WebLogic Version – 10gR3 (10.3)
 - Minor upgrade to iAS version - 10gR3 (10.1.3.4)
 - Database:
 - De-support Oracle 9i, Add support for 11gR1 (RAC and standalone), Continued support for 10gR2 (RAC and standalone)
 - Browser:
 - **De-support Internet Explorer 6 (IE6)**
 - IE6 Web Browsers cannot login to Agile PLM 9.3
 - Add support for Firefox 3
 - Continued support for IE7, Firefox 2, and Safari on Mac
 - Adding Internet Explorer 8 in a future Service Pack
 - Server Operating System:
 - Add support for Oracle Enterprise Linux 5, Red Hat Enterprise Linux 5, and Windows Server 2008 SP1
 - Continued support for Windows Server 2003 SP2, Solaris 9 (SPARC), Solaris 10 (SPARC and x86), Oracle Enterprise Linux 4, Red Hat Enterprise Linux 4, IBM AIX 5.3
 - AutoVue for Agile
 - Minor upgrade to Oracle AutoVue Electro-Mechanical Professional for Agile (19.3.2 for Windows and 19.3.1 for Linux)
 - Server Virtualization
 - No support for VMWare 3.0
 - Add support for Oracle VM 2.1.2

Note: Review the Oracle Agile PLM 9.3 Capacity Planning Guide for the official, detailed platform certification matrix.
- New Agile Application Management Pack for Oracle Enterprise Manager (10gR4)
 - Monitor health of following servers using Enterprise Manager server plug-in:
 - Database server (10g & 11g), Application server (WLS, iAS), Web Server, Distributed File Manager (DFM) and LDAP
 - Track Agile PLM deployments using Agile PLM plug-in:
 - Agile PLM application status and alerts
 - User usage reports for Named users and Concurrent users
 - Agile PLM, Database, and application server versions

3 Specific Impact of Agile PLM 9.3 on PLM Modules

This section focuses more on the new features relating to specific PLM modules as well as how the modules gain from the User Experience, Automation, and Web Services improvements.

3.1 Product Portfolio Management

- Industry Standard class & Sub-class names
 - Incorporation of Best Practices
- Usability Enhancements
- Consistency across the board
 - Standardized Messages and Icons
 - Personalization on all tables
- Navigator
- Improved Summary Page
- Enhanced Dashboard
- Standardization of Discussion Object
- Simplified MSP Wizard
- Collaboration tab
- Project Keywords

3.2 Product Governance and Compliance

- Faster Compliance Rollup
 - Ability to schedule rollup for all shippable items or just for impacted shippable items.
- Tracking of Part's compliance changes through History tab
 - Ability to quickly determine when a part's compliance changed
- Flexible Scheduling of BOM Compliance Report
 - Automatic scheduling for any future revisions of a part
- Hiding of not-applicable Specifications in a Part
 - Available through View Personalization
- Usability Enhancements
 - Inline editing
 - Copying and Pasting of Bill of Substances
- Events Support for PGC specific actions

3.3 Product Cost Management

- Ability to quickly add items from PC to a Sourcing Project through drag/drop and copy/paste
- Support for inline editing of prices in Supplier RFQ
- Existing pre-defined filters in PCM tabs replaced and enhanced by View personalization
- Support for multiple column filtering in Sourcing Project-AML tab.
- Changes tab in Sourcing Project and RFQ redesigned.
- Response Status tab in RFQ redesigned
- Action buttons rearranged in PCM tabs.
- Events Support for PCM specific actions

3.4 Product Quality Management

- Usability Enhancements
 - Type ahead list entry
 - Drag and drop onto tables
 - Inline table editing
 - Locking columns in tables
 - Filtering through personalization and views in tables
- Out of the box web services for enterprise integration
- Enhanced automation capabilities through Events and configurable notifications

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