



ChangeCAST User Guide

Release 9.2.1

Part No. E11118_01

Make sure you check for updates to this manual at the
[Oracle Technology Network \(OTN\) Web site](#)

Copyrights and Trademarks

Copyright © 1995, 2007, Oracle. All rights reserved.

The Programs (which include both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software--Restricted Rights (June 1987). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

Oracle and Agile are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

November 15, 2007

CONTENTS

Preface

Agile PLM Documentation	v
Readme	v
Agile Training	v
Developer Documentation and Samples	v

Chapter 1 Introducing ChangeCAST

The ChangeCAST Window	1-4
Title Bar	1-4
Menu Bar	1-4
Toolbar	1-5
Profile Library Table	1-5
Profile Library Fields	1-6
Profile Library Buttons	1-6
Transfer Log Table	1-6
Transfer Log Contents	1-7
Transfer Control Buttons	1-7
ChangeCAST Status Bar	1-7
Upgrading From a Previous Version of ChangeCAST	1-7
Starting ChangeCAST	1-8
Minimizing On Launch	1-8
Logging In As a Different User	1-9
Getting Help	1-9
Where to Go From Here	1-9

Chapter 2 Working with Profiles

Adding a New Profile	2-1
Importing a Profile	2-2
Auditing and Validating the Imported Profiles	2-2
Copying Profiles	2-4
Renaming Profiles	2-4
Removing Profiles	2-5
Using Profiles	2-5
Distributing Profile Libraries	2-5

Chapter 3 Defining Attributes and Mapping Fields

Differentiating Documents from Parts and MCOs from ECOs	3-2
Defining Target System Attributes	3-2
The Attributes Table Dialog Box	3-2
Attribute Text Boxes	3-3
The Attributes Table	3-3

Chapter 4 Formatting and Transferring Data Files

Backing Up Files..... 4-8
Suggestions for Troubleshooting 4-9
 Error Recovery 4-9
 Troubleshooting 4-9

Index

CHAPTER 1

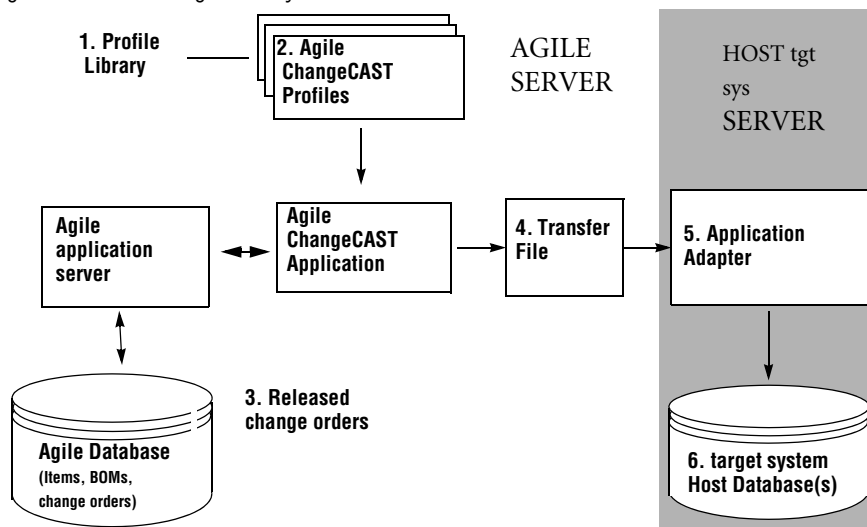
Introducing ChangeCAST

This chapter provides an overview of how ChangeCAST transfers data from Agile to target system and explains how to set up and start ChangeCAST. It has the following sections:

- *About ChangeCAST*
- *Some Important Definitions*
 - The ChangeCAST Window*
 - Upgrading From a Previous Version of ChangeCAST*
 - Starting ChangeCAST*
 - Getting Help*
 - Where to Go From Here*

About ChangeCAST

Figure 1-1: The ChangeCAST cycle



Profiles

- The format of and naming convention for ChangeCAST transfer files

libraries

3

4

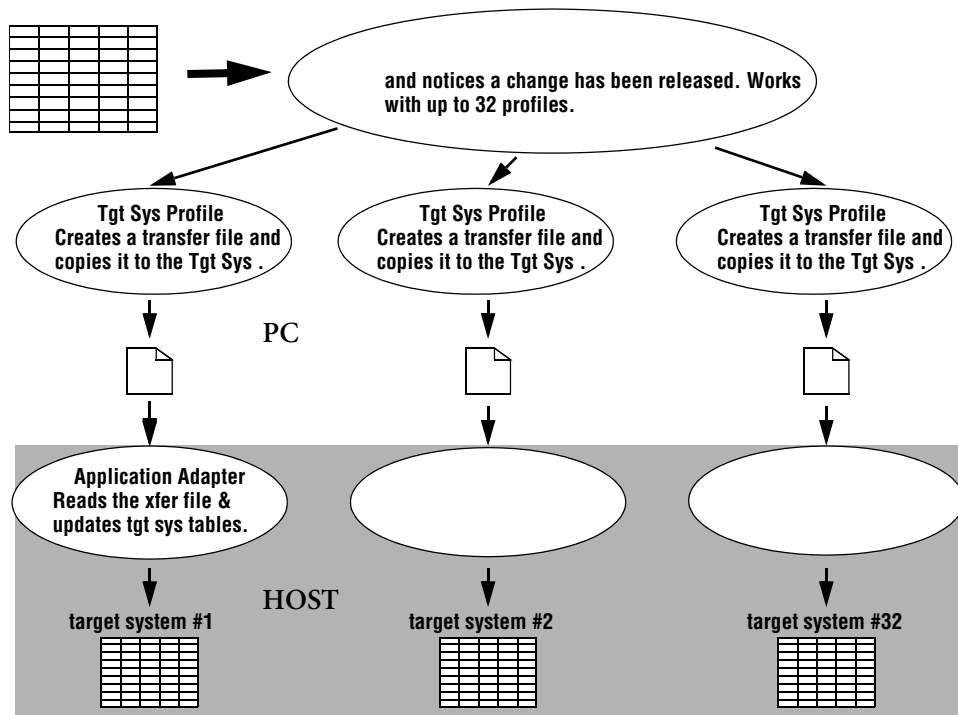
5

6

target system site receives the transfer file, it validates the data and sends the data to the host target system's database.

ChangeCAST can synchronize up to 32 different target systems with the data in the Agile system, as illustrated in Figure 1-2.

Figure 1-2: ChangeCAST



Some Important Definitions

Table 1-1: Terminology

Term	Definition
General Terms	
	<i>target system attribute</i> <i>target system field</i>
	possible states are Paused and Resumed, controlled by buttons in the main ChangeCAST window.
Field	An individual piece of information; an attribute or column of a table. The terms <i>target system attribute</i> and <i>target system field</i> are used interchangeably in this manual.
Mapping	The pairing of target system attributes with Agile fields, system nulls, system variables (also known as system flags), or the result of a conditional expression.
Profile	A collection of settings used by ChangeCAST to process and deliver the transfer file to the target system. Profiles define many aspects of data transfer from Agile to a single target system, including transfer file structure definition, transfer settings, scheduling information, data mapping, and directory/file locations.
Profile library	Up to 32 profiles together in a single file with extension .agx (for ChangeCAST 8.1 and later) or .agc (for previous releases).
Row	A grouping of fields or a record in a table that represents a data element.
Table	An organized collection of records.
Transfer flag	An internal setting that tells ChangeCAST whether a change order has been successfully transferred.
Released	ChangeCAST checks for newly released change orders and MCOs (Manufacturer Change Orders). A change order or MCO is considered released when it enters the first Released-type status in the workflow. <i>Only the Released-type status actually releases the routable object.</i> Subsequent Released-type statuses—given distinguishing status names—provide additional review/approval cycles for the released routable object. If the workflow includes a Complete-type status, it is the last status in the workflow.
Change Order MCO	ChangeCAST transfers both change orders (Change Order Class objects) and MCOs (Manufacturer Change Order Class objects).
ChangeCAST components	
ChangeCAST files	

Terminology (continued)

	A file that contains all aspects of one or more profiles. AGX files (for the current ChangeCAST) are text files. AGC files (the format for pre-8.1 releases of ChangeCAST) are binary files.
Temporary (.agl.tmp)	Temporary files created during processing.
Transfer file (.agl, by default)	A formatted ASCII file, output from ChangeCAST, which is used to transfer change order information from Agile to a host target system. There is at least one transfer file for every change order processed by ChangeCAST. Transfer files adhere to the settings defined in corresponding profiles.
Transfer log (TransferLog.txt)	A log file that tracks the status of ChangeCAST's connect state and transfer attempts.

The ChangeCAST Window

Title Bar

Menu Bar







ChangeCAST menu options

Menu	Actions
File	
Edit	
View	
Profile	
Mapping	
Format	

Transfer	
Reports	
Help	

Toolbar

Table 1-3: Toolbar buttons

Button	Actions
 Add Profile	
 View Log File	
 Edit Mapping	
 Format Options	
 Transfer Options	
 Audit	

Profile Library Table

Profile Library Fields

Table 1-4: Profile Library fields

Field	Description

Profile Library Buttons

Table 1-5: Profile Library buttons

	Activates the current profile and changes the Enabled field to Yes, after first auditing the mappings.
Disable	
Move Up	
Move Down	
Import	file (*.agx or *.agc).

Transfer Log Table

Transfer Log Contents

Table 1-6: Contents of each logged transaction

Change #	The number of the current change order, for example EC23-2200.
Filename	The name of the transfer file for the last change order transferred, for example AG000023.agl.
Transfer Status	Comments indicating whether the transfer was successful or not and additional information about the transfer, if appropriate.
Destination	The FTP site or local directory where the file was to have been transferred.
Status	The transfer status of the last change order transferred, whether successful (Success) or not (Failed).

Other event information also appears in the Transfer log. For more information, see “Viewing and Printing Log Files” on page 4-7.

The buttons described in Table 1-7 control transfers. These buttons are located to the right of the Transfer log.

Table 1-7: Transfer control buttons

ChangeCAST Status Bar

Upgrading From a Previous Version of ChangeCAST

Caution!

not

not

any

To upgrade ChangeCAST on a system where a previous version of ChangeCAST is installed:

- 1
- 2
- 3
- 4
- 5

Note

Agile

Integration Developer Guide

using

Agile 9 | Agile ChangeCAST Server.

Pause

Resume

Minimizing On Launch

Minimized On Launch

Options

Edit

Table 1-8: Launch behavior summary

Minimize On Launch	Last Connect State	Launch Behavior
		Note:

Logging In As a Different User

Getting Help

Where to Go From Here



Working with Profiles

Creating and Managing Profiles

Using Profiles

Distributing Profile Libraries

profile library

Creating and Managing Profiles

Adding and Importing Profiles

OK

Adding a New Profile

Integration Developer Guide.

Importing a Profile

profile library (.agx or .agc file):

1 Import

2

Next

3

Open

4

Select All

Deselect All

5

Next

6

Keep transfer state settings Set all

change orders as transferred Set all change orders as NOT transferred

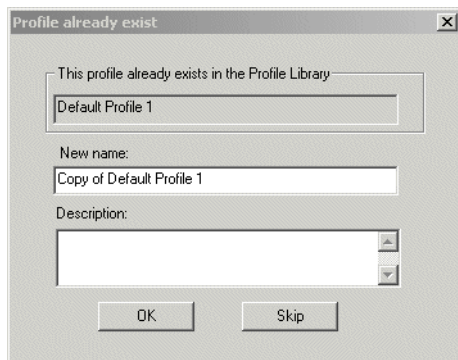
Help

7

Profile Library Options

Finish

8

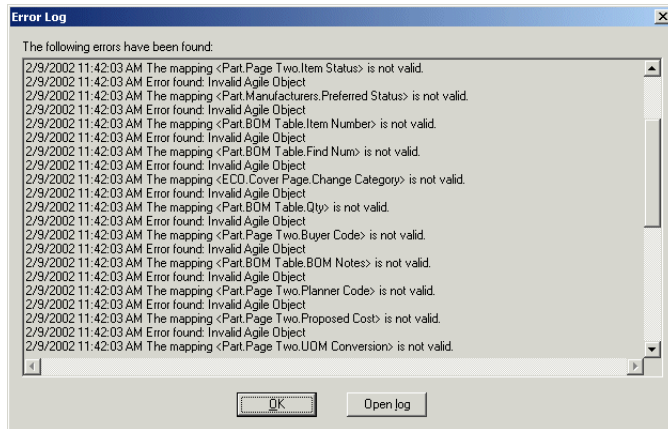


Note

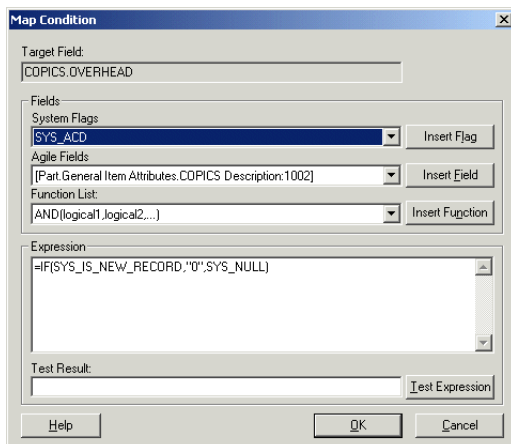
Transfer Notification Transfer Schedule

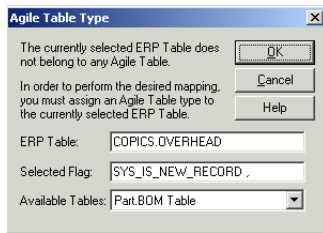
Transfer Protocol


Auditing and Validating the Imported Profiles





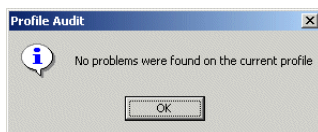
Map Condition dialog box







At this point, you should be back at the Field Mappings dialog box. Click  to close the dialog box and proceed to the next step.

You can now re-audit the profile. Choose  | . The Audit function reviews the profile again and should confirm that the profile is responding normally and that all mapped tables are valid. If they are, you should receive the following message:



If the audit returns no errors, your profiles are in good shape. If you receive additional audit errors, perform Steps 2 through 5 again until all conditional rows are validated. If you continue to receive errors, contact Agile Support.

You can create a new profile by copying one that already exists in your profile library. The copy contains the Format settings and Mappings of the original profile. The name and Transfer settings must be entered by the user.


Choose  from the  menu.

The Copy Profile dialog box appears.

Use the drop-down list to select a source profile from your profile library. The currently selected profile appears by default.



Enter a new name for the selected profile. The currently selected profile name appears by default.

Enter a new description or edit the current description. The description of the currently selected profile appears by default.

Click  to add a profile with the new name and description.

The new profile name is checked for uniqueness. If a duplicate is found, you must enter a different name.


You can rename the currently selected profile or change the profile description.

Either select a profile in the Profile Library table of the ChangeCAST window and choose  from the  menu, or double-click a profile in the Profile Library table.

The Rename Profile dialog box opens with the selected profile loaded.

Enter a new name for the profile. The name of the selected profile appears by default.

Enter a new description, or edit the current description. The description of the selected profile appears by default.

Click  to apply the new name and description to the selected profile.

The new profile name is checked for uniqueness. If a duplicate is found, you can enter a different name.

Removing Profiles

If necessary, you can remove a profile from the profile library.

Select a profile in the Profile Library table of the ChangeCAST window and choose from the menu.

You are prompted to remove the profile or cancel the operation.

Click to permanently remove the selected profile.

When you delete a profile, the transfer flags are cleared, a process that can take several minutes. It is very important that you wait while ChangeCAST completes this process.

Before you can use a profile, you need to: set up its Attributes table, complete a set of Agile-to-target system field mappings, enter transfer destination and schedule information, and set up a list of users to notify in case of transfer problems. For instructions, see Chapter 3 and Chapter 4.

Distributing Profile Libraries

Copy it to a temporary folder such as c:\temp, to make sure that no ChangeCAST file is overwritten.

Before you import the new profiles, decide whether to replace the current version of ChangeCAST.agx with the new profile library, or import profiles from the new profile library into the existing profile library.

After deciding what to do with the profile library, follow the instructions for importing profiles on page 2-2.

Verify Transfer settings.

CHAPTER 3

Defining Attributes and Mapping Fields

This chapter describes how to set up ChangeCAST attributes and Agile-to-target system field mappings. Together, these settings define which Agile data is passed to which fields in the target system. It has the following sections:

Guidelines for Defining Attributes and Field Mappings

Differentiating Documents from Parts and MCOs from ECOs

Defining Target System Attributes

Specifying and Verifying Agile-to-Target System Field Mappings

Producing ChangeCAST Reports

Differentiating Documents from Parts and MCOs from ECOs

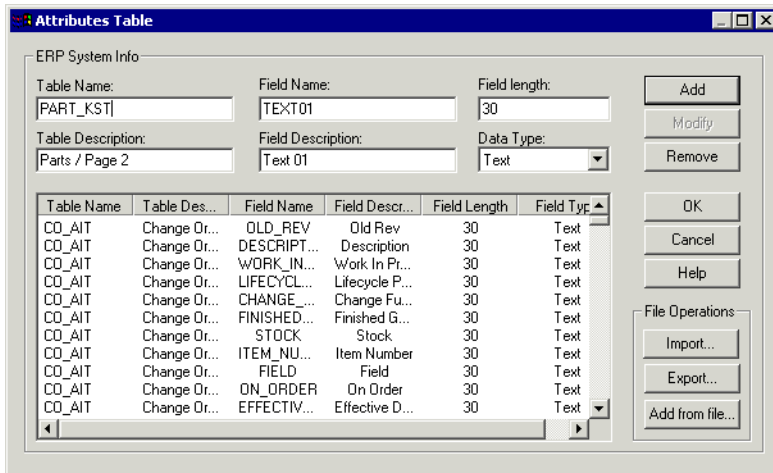
Defining Target System Attributes

by opening or importing a ChangeCAST (*.aga) attribute file. For more information, see “The Attributes Table Dialog Box” below.

After you define a set of attributes, you can print and review an Attributes report (described on page 3-11). Modify the attribute definitions if necessary.

It is recommended that you include of the fields available for the target system. This makes it easier to add mappings that were not used in your initial ChangeCAST implementation.

The Attributes Table Dialog Box



Attribute Text Boxes

Fields for each row in selected table

	The type of data: numeric, date, or text.

The Attributes Table

Attributes Table Dialog Box Buttons

Table 3-2: Buttons for Attributes table

Caution!

mappings

all existing

Exporting Attributes

Verifying Attributes

Specifying and Verifying Agile-to-Target System Field Mappings

Guidelines for Mapping Fields

() * .

Mapping Manufacturer or AML Fields

Mapped target system attributes are boldface. Click one to see the mapping under Mapped Fields.

The screenshot shows the 'Field Mappings' dialog box. It is divided into three main sections: 'Agile Fields', 'Target ERP Fields', and 'Mapped Fields'. The 'Agile Fields' list includes 'Description of Change [1052]', 'Final Complete Date [3743]', 'Number [1047]', 'Originator [1050]', 'Product Lines [1003]', 'Reason Code [1049]', 'Reason For Change [1053]', 'Status [1030]', and 'Workflow [3742]'. The 'Target ERP Fields' list includes 'CHANGE_TYPE', 'DATE_RELEASED', 'REASON_CODE', 'ORIGINATOR', 'DATE_ORIGINATED', 'NUMBER', 'CHANGE_ANALYST', 'CHANGE_CATEGORY', 'SYS_ROOTCHANGEID', and 'PRODUCT_LINES'. The 'Mapped Fields' section contains a table with 8 rows, each mapping an ERP attribute to an Agile attribute. The ERP attributes in the table are bolded. A line from the text above points to the 'SYS_ROOTCHANGEID' row in the table.

No.	ERP Attribute	Agile Attribute
1	CO_GCA.SYS_ROOTCHANGEID	SYS_ROOTCHANGEID
2	CO_GCA.CHANGE_TYPE	ECD.Cover Page.Change Type
3	CO_GCA.DESCRPTION_OF_CHANGE	ECD.Cover Page.Description of Change
4	CO_GCA.REASON_FOR_CHANGE	ECD.Cover Page.Reason For Change
5	CO_GCA.CHANGE_CATEGORY	ECD.Cover Page.Change Category
6	CO_GCA.REASON_CODE	ECD.Cover Page.Reason Code
7	CO_GCA.PRODUCT_LINES	ECD.Cover Page.Product Lines
8	CO_GCA.STATUS	ECD.Cover Page.Status

Clicking a row selects the corresponding Agile and target system fields above.

Tree or Table	Description

No.

No.

Target System Attribute

Note

Agile Attribute

Button	Action
	<p>Caution! removes the selected mapping row. There is no undo for this action! If you remove a mapping and want to retrieve it, recreate it with the mapping tools at the top of the dialog box, or click to close the Field Mapping dialog box and lose any modifications that you have made.</p>
	<p>Moves the selected mapping up in the list within the appropriate table.</p>
	<p>Moves the selected mapping down in the list within the appropriate table.</p>
	<p>Displays the Map Condition dialog box for the selected mapping. If no condition is configured, you can create a condition. If a condition already exists, you can edit the existing condition.</p>
	<p>Displays a dialog box where you can specify the output order of the mapped tables.</p>

Expand the source Agile Fields tree, and select the source Agile field.

Expand the Target Fields tree, and select the target system field.

Click the button. The mapping appears in the Mapped Fields table.

If you want to map a target system field to be passed to the system NULL character, map the field to NULL. This is often used to convey a default setting.

Expand the Target Fields tree, and select the target system field.

Click the button.





When you map a field to null, the field is listed in the Mapped Fields table. SYS_NULL appears in the column in the Mapped Fields table as a placeholder for an Agile field or mapping condition.






Mapping to System Variables

Specifying a Map Condition

Editing Condition Formulas

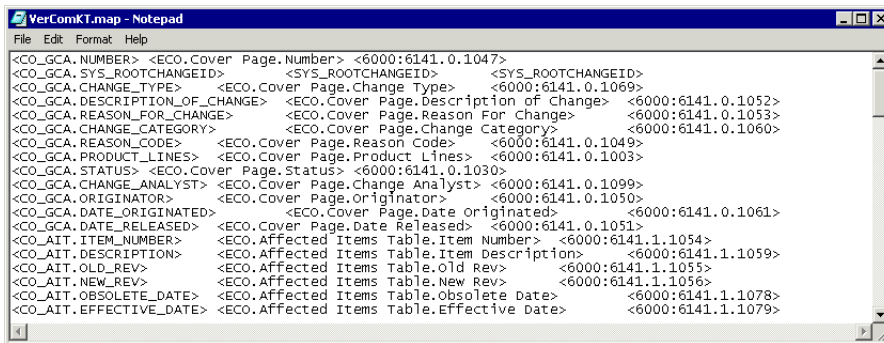
cut (Ctrl+X), copy (Ctrl+C), and paste (Ctrl+V) selected text or type it directly.

Conditions are verified when the profile is enabled, when you click , or you click the  button in the Map Condition dialog box. When you are done with all mappings, you can click the  button in the ChangeCAST toolbar to test for syntax errors. See “Toolbar” on page 1-5 for an illustration of the  button. For more information about the Error log, see page 4-7.

For more information about conditional field mappings, click  in the Map Condition dialog box or choose  from the ChangeCAST menu bar, then choose  on the Help  tab. The ChangeCAST  contains examples to help you set up and debug conditions.

You can import and add field mappings from mapping (.MAP) files generated with other ChangeCAST 8.1 or later systems.

Sample .MAP file



replacing

adding

Yes

3

Open

To add field mappings in the Field Mappings dialog box:

1

Add

2

Open

Note

To export field mappings:

- 1
- 2 Mapping Edit Mappings
- 3 Export
- 4
- 5 Save

To adjust the processing order of mapped fields at the table level:

- 1 Reorder Tables
- 2 Move Up Move Down
- 3 OK

To reorder field mappings directly:

- 1
- 2 Move Up Move Down
- 3 OK

Producing ChangeCAST Reports

To produce a Profile report:

- 1 Reports
 - 2 Current Profile All Profiles
 - 3
-

Attributes

Mappings

Settings

Transfer Options

4

5 Save

To produce an Agile Tables report:

1 Reports Agile Tables

2

3 Save

Formatting and Transferring Data Files

destination and schedule settings. It also describes how to perform transfers, check logs, and correct transfer problems. It has the following sections:

Formatting ChangeCAST Transfer Files

Reviewing and Modifying Transfer Settings

Enabling and Disabling Profiles

Starting and Stopping ChangeCAST

Viewing and Printing Log Files

Retransferring Change Orders

Forcing Unscheduled Transfers

Backing Up Files

Suggestions for Troubleshooting

should not

- Basic elements of the file structure, such as data/layout sections and orientation (horizontal or vertical)
 - — Whether fields are delimited or fixed length, and which characters to use as delimiters
-

-
- — Format options for reference designators, time and date formats, text data conversions
 - **BOM/AML Settings**

3

4

Transfer

Protocol

Notification

Schedule

Files

Application Adapter

Important

Reviewing and Editing Protocol Settings

Protocol

Use FTP

Protocol

Notification

Transfer Now

To display the Protocol tab, do one of the following:

Protocol

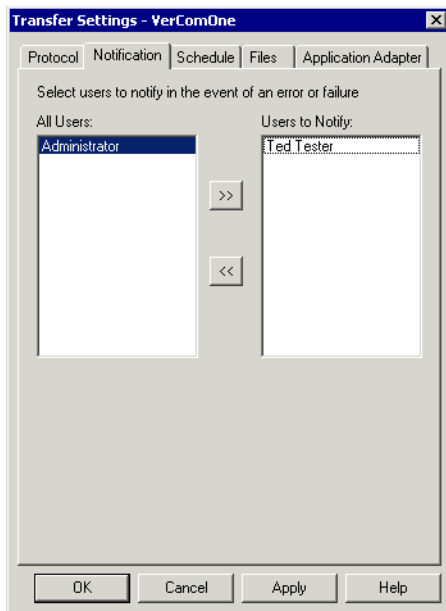
Transfer

Transfer Options

Reviewing and Editing Notification Settings

	Lists eligible users, and is obtained from Agile Administrator; restart ChangeCAST to update the list.
	Users selected to receive an email in the event of an error; if none are listed, no one is notified.

Notification settings



Use >> to move the selected user from the list to the list.

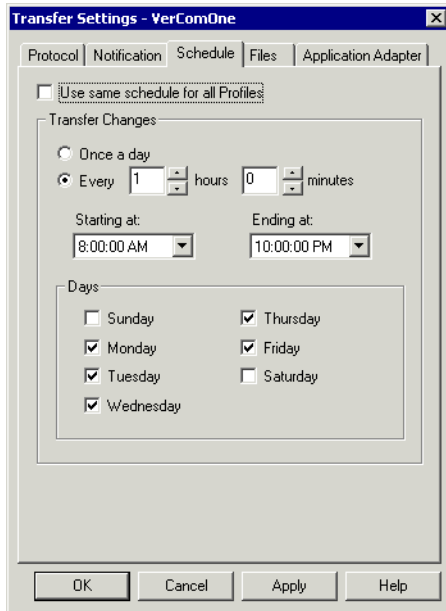
Use << to remove the selected user from the list and add it back to the list.

+click or +click to select more than one user.

If users were added to Agile Administrator while ChangeCAST was running, you can restart ChangeCAST to discover new users.

You can use the tab of the Transfer Options dialog box to specify how often to poll the Agile database and transfer released change orders.

Select a profile in the ChangeCAST window and choose Schedule from the Transfer menu.
Use the Schedule toolbar button.



You can review the following Schedule settings and change them if necessary:

	If checked, uses the same schedule for all profiles; if not checked, the current Schedule settings apply only to the selected profile.
	Automatically runs the transfer once a day at the designated start time. The default is once a day.
	The default; specifies the time interval between transfers, calculated from the Starting At time: <ul style="list-style-type: none"> • If previous transfer processing is not finished, the next transfer does not begin until the next scheduled time arrives. • The minimum time is 0 hours, 5 minutes; the maximum time for each field is 11 hours and 59 minutes. • The default is 1 hour, 0 minutes.
	Specifies an absolute time to start checking for released change orders: <ul style="list-style-type: none"> • This option must be set. • The default starting time is 8:00 AM.
	Specifies an absolute time to stop checking for released change orders, for example, to stop the schedule for regular backups or maintenance: <ul style="list-style-type: none"> • The default time is 5:00 PM.
	Specifies the days to process change orders according to the hourly schedule; Monday through Friday are selected by default.

The ChangeCAST Service uses the Starting At and Ending At times to determine whether to process change orders:
If the Schedule button is clicked, but the current time is between the End and Start times (down time), no change orders will be processed until the Start time is reached.

If the button is clicked, then the Agile ChangeCAST Service is stopped regardless of the schedule until it is started (Resumed).

For multiple profile processing, processing proceeds profile by profile.

You can use the command to override schedule settings and force ChangeCAST to poll for change orders. For details, see “Forcing Unscheduled Transfers” on page 4-8.

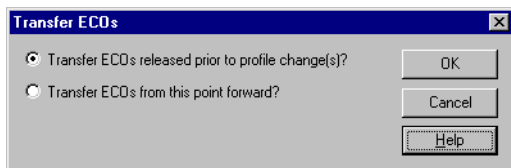
By default, new profiles are disabled. When you have created or imported a profile and verified all settings for it, you can enable it.

Select it in the Profile Library table in the upper part of the ChangeCAST window.

Click the button.

The Transfer ECOs dialog box appears (Figure 4-4).

The Transfer ECOs dialog box



I



Backing Up Files

Queue

Files:

ChangeCAST.agx — contains all available target system profile maps.

ErrorLog.txt — contains all errors logged by each profile

Service.txt — contains a list of all profile transaction histories.

TransferLog.txt — contains the full transfer history for each active profile.

Each of the files and folders listed above is updated daily and automatically by ChangeCAST. If a ChangeCAST problem occurs, Agile Support may ask for copies of these files for review. Agile administrators should become familiar with these files and folders and know how to access and read them.

If your company backs up the Oracle Database and Agile iFS directories on a daily basis, these files should be included in the daily backup process.

Suggestions for Troubleshooting

Here are a few guidelines on error recovery and troubleshooting in case a transfer failure or other error occurs.

If a transfer fails, create a corrected change order and release it in Agile. ChangeCAST will process the new information and send it to the application adapter. If not all errors in the change order are corrected, the application adapter will stop again, requiring a second correction, and so on.

Check the Transfer log and Error log described on page 4-7. If the application adapter for the target system has a log file, check it as well. The next section describes other ways to trace the source of an error.

part or BOM on the target system? Identify all differences and similarities. Identify which system is correct, and make appropriate changes to the incorrect database to ensure that data will be updated with the next attempt.

In Agile, are there effective dates on all affected items? Take corrective action if necessary.

In Agile, are there new revisions on all affected items? Take corrective action if necessary.

In Agile, have all affected items been placed on the _____ tab? Take corrective action if necessary.

In Agile, are all required fields filled in? Take corrective action if necessary. (This may require the Agile administrator to make changes to ensure that this problem does not reoccur.)

Does the transfer file correctly reflect any changes to parts and old versus new BOM configurations? Check the ChangeCAST profile.

Does the transfer file have the correct mapping of data? Check the ChangeCAST profile.

Does ChangeCAST generate the file in the correct format? Check the ChangeCAST profile.

Does the transfer file use correct conversion logic for dates, nulls, CR/LF, and so on? Check the ChangeCAST profile.

Have commands to add, modify, and delete parts or BOMs been disabled, or has access been changed on the host system? See the target system or database administrator.

INDEX

A

G

H

I

...

D

B

L

E

M

C

F



T

N

O

P

immediate or "on demand" 8
troubleshooting 9

U

V

W

R

S

