

Agile Advantage™

Web Client User Guide

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Preface

The Agile Advantage documentation set includes Adobe® Acrobat™ PDF files. The Oracle Technology Network (OTN) Web site (http://www.oracle.com/technology/documentation/agile.html) contains the latest versions of the Agile Advantage PDF files. You can view or download these manuals from the Web site, or you can ask your Agile administrator if there is an Agile Advantage Documentation folder available on your network from which you can access the Agile Advantage documentation (PDF) files.

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Readme

Any last-minute information about Agile Advantage can be found in the Readme file on the Oracle Technology Network (OTN) Web site (http://www.oracle.com/technology/documentation/agile.html).

Agile Training Aids

Go to the Oracle University Web page (http://www.oracle.com/education/chooser/selectcountry_new.html) for more information on Agile Training offerings.

Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.



CHAPTER 1
Introducing Agile Advantage

This chapter gives an overview of Agile Advantage concepts, including:

- *Overview of Agile Advantage*
- *New Features in This Release of Agile Advantage*
- *Supported Web Browsers*
- *Introducing Agile Objects*
- *Change Control Process*
- *Quality Management Process*
- *Product Sourcing Process*
- *Other Important Concepts*

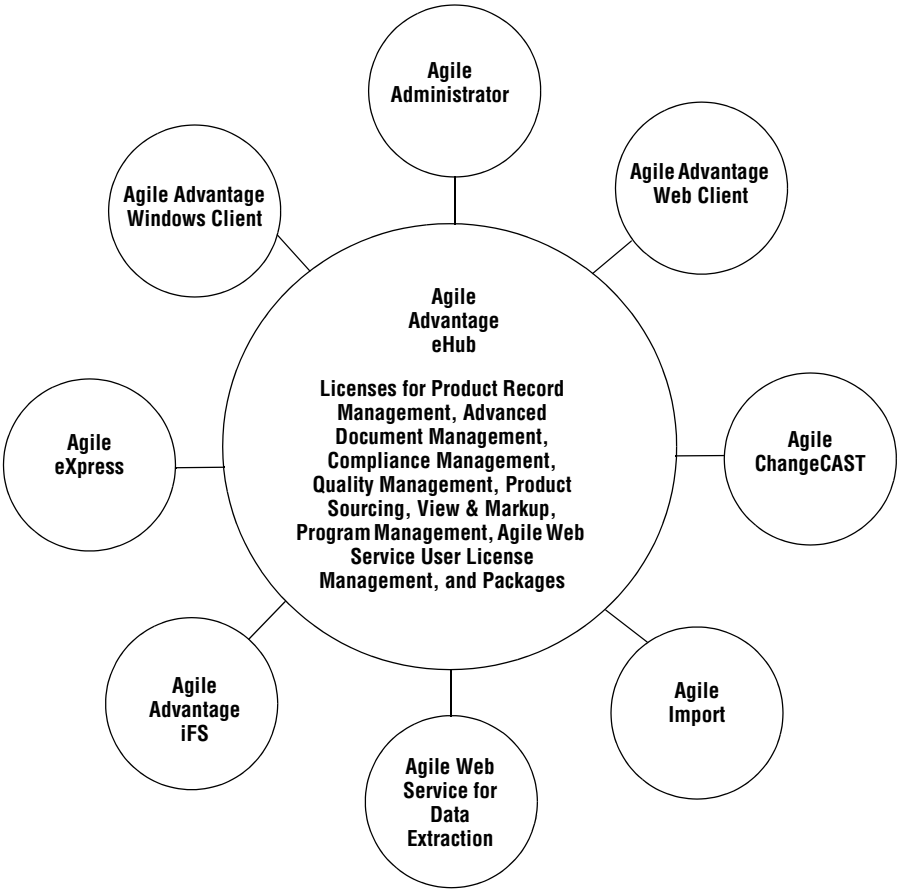
Overview of Agile Advantage

Agile Advantage links supply chain partners in a virtual network for product introduction, manufacture, change, and quality tracking.

Agile Components

The following figure shows the software components of Agile Advantage and the relationships among them.

Figure 1-1: Agile Advantage Components



The Agile Advantage eHub is the foundation of the Agile Advantage suite. This component helps supply chain partners define, store, change, and manage product content information. Agile eHub scales to accommodate the needs of supply chain partners of all sizes.

The Agile Advantage eHub manages data stored in the Agile Advantage iFS™ attachments vault and the database. Agile eHub receives commands and/or data from these main Agile components:

- The Agile Advantage Windows client supports product configuration, change, and vendor management.
- The Agile Advantage Web client provides internal users and trusted supply chain partners with secure access to the Agile Advantage system over the Internet or intranets.
- Agile Administrator™ lets Agile administrators create object types, set object properties, add user accounts, and perform other Agile administration tasks.
- Agile Administrator™ Web client lets certain individuals create and manage user accounts and groups via a Web interface.
- Agile Import™ adds new and changed data from text files and spreadsheets into the Agile database.
- Agile ChangeCAST™ relays product configuration and change information to third-party ERP systems.
- Agile eXpress™ Viewer allows supply chain partners to view PDX packages of product definition information over the Web without connecting to an Agile Advantage eHub.
- Agile eXpress™ Professional offers users the same functionality of the Agile eXpress Viewer plus the capability to connect to an Agile Advantage eHub to create PDX packages.

Agile Advantage Web client provides fast, direct Internet access to Agile Advantage eHub. through a Web browser running on Windows® 2000 Professional, and Windows XP Professional, and Windows Server 2003 Standard Edition. For more information about these and other Agile Software® products, see Agile's Web site, `http://sme.agile.com/Support/Login.asp`.

New Features in This Release of Agile Advantage

Agile Advantage 2006 includes these features, newly added since Agile Advantage 2005:

- Full Text Search (FTS) for attachment file contents - Enables the user to find specific information stored in files in the Agile Advantage Web client secure vault. The user can search for attachment files in order to find a particular word or phrase through the Quick Search or the Advanced Search.
- Email Notification Templates - Enable the user to customize email templates that correspond to particular triggered events (e.g. Notify Originator On Return) and to the Agile Object associated to them (e.g. Problem Report).
- Active Directory Support - Eases the maintenance of Agile users by providing an easy connection to an Active Directory server and promoting a user authentication model that is not completely dependent on the Active Directory server.
- Product Compliance Management (PCM) - The PCT solution helps multinational companies include into their standards, their unique interpretation of future changes to requirements (e.g. RoHS, WEEE) and new compliances with new regulations. The PCT solution produces a potential competitive advantage by enabling companies to implement such new compliances into their supply chain ahead of the official governed compliance-required changes.
- Engineering Data eXchange (EDX) for publishing engineering design data to Agile Advantage.
- Users and Users Contacts are searchable from within the Agile Advantage system.
- Data Access, Extraction and Reporting - Enables the user to access and export any Agile Advantage object in order to open, view and manipulate the object data with external tools and applications. The exported file format can be either a Comma Separated Value (CSV) file, or a Product Data eXchange (PDX) package.
- Ability to control both column width and order of Manufacturers and BOM tabs.

- Additional control over the document comparison feature - A new node was added in Admin\Preferences\Viewer and Files\Agile Viewer to allow the Administrator to control the compare feature support by file type.
- New eHub and iFS connection model - While being robust, the connection model ensures that client connection requests to the Agile Advantage system are properly routed. In addition, the new connection model supports automated and constant monitoring of the Agile services to ensure they are always running and available for client connections.
- AutoVue Professional Desktop Edition v19.1 SP2. This is the latest Viewer from Cimmetry, supporting the most recent versions of a number of leading CAD software systems, including SolidWorks 2007, MicroStation V8XM, and OneSpace Designer Drafting (ME10).
- Improved Audit Window - The new Agile Advantage 2006 SP2 version of Audit Window adds fourteen new Compliance Management rules and organizes them thus providing an easier management. These new capabilities greatly accelerate the tracking of product compliance and improve the productivity of analysts.

Supported Web Browsers

If you are using Windows XP Professional Service Pack 1, or Windows 2000 Professional Service Pack 4, or Windows Server 2003 Standard Edition, you can use the following browsers to access the Agile Advantage Web client:

- Internet Explorer 6.0 Service Pack 1 (6.0.2800.1106.xpsp2.030422-1633 and later)

  Note For information about international operating systems and supported browsers, contact the Agile Software support Web site; see "Agile Online Support" on page iv.

Introducing Agile Objects

In the Agile Advantage system, you work with *objects*, which can be:

- Items (Parts and Documents)
- Changes
- Manufacturers
- Manufacturer Parts

- Suppliers
- Customers
- Product Service Requests
- Corrective Action Requests
- Agile Packages

This section covers the following topics:

- Types of Agile Objects
- Object Superclasses, Classes, and Subclasses
- How Objects Appear
- Routable Objects

The objects you can view and the actions you can perform are determined by the server components installed on the Agile eHub application server and the licenses, roles, and privileges you are granted to access those components. Privileges can vary from field to field. If you have questions about your licenses, roles, and privileges, contact your Agile administrator.

Types of Agile Objects

The following table briefly describes each kind of object.

Table 1-1: Types of Agile objects

Type of Agile object	Used to manage or track...
Items	**Parts** or **Documents**
Changes	Modifications to items. Changes include: **change orders** (ECOs), **change requests** (ECRs), **deviations**, **manufacturer orders** (MCOs), **stop ships**
Manufacturing objects	Approved **manufacturers** of parts used in the company's products and the **manufacturers parts** they supply
Sourcing objects	Approved **suppliers** of parts procured and used in the company's products, the **manufacturers parts** they supply along with their costs

Table 1-1: Types of Agile objects

Type of Agile object	Used to manage or track...
Quality-related objects	**Customers**, **product service requests** (**problem reports** and **issues**), and **corrective action requests**
Packages	**Packages** of files or documents with information about products

Your Agile administrator can define multiple objects under each object class.

Object Superclasses, Classes, and Subclasses

Objects are organized into superclasses, classes, and subclasses. The table below lists the out-of-box classes and subclasses of Agile objects that store product content and change information. Each Agile class has a default subclass. Your Agile administrator may have created additional subclasses or renamed existing ones.

Table 1-2: Installed Agile product record object types

Superclass	Agile class	Installed subclass
Item	Parts	Part
	Documentation	Document
Change	Change Orders	ECO
	Change Requests	ECR
	Deviations	Deviation
	Manufacturer Orders	MCO
	Stop Ships	Stop Ship
—	Suppliers	Supplier
—	Manufacturers	Manufacturer
—	Manufacturer Parts	Manufacturer Part
—	Customers	Customer
Product Service Request	Problem Reports	Problem Report
	Issues	Issue
—	Quality Change Requests	Corrective Action Request
—	Packages	Package
Note: *Subclass names cannot be used more than once within an Agile Advantage system.*		

Your Agile administrator defines new objects by creating subclass objects under each object class. For example, under the Deviations class, you may see subclasses such as MechDev, SWDev, and Part Switch, in addition to the default subclass, Deviation.

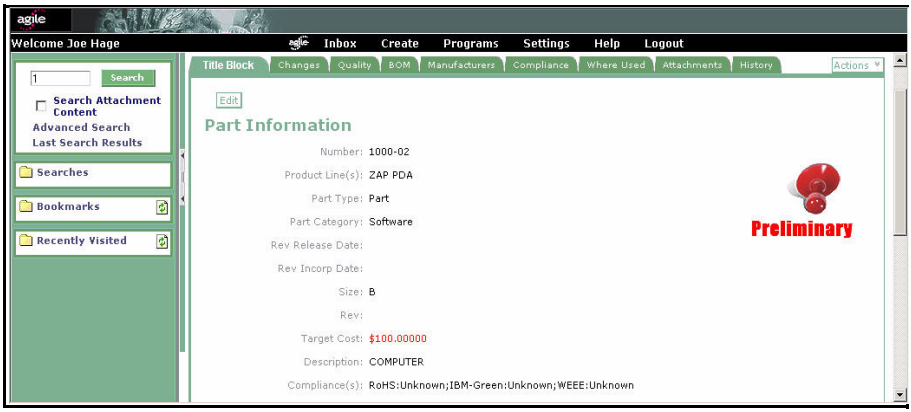
How Objects Appear

When you open an object, it appears with a number of tabs. Different types of objects have somewhat different tabs. Each tab contains fields that provide information about that object. For example, a part's **Title Block** tab includes **Number**, **Part Category**, and **Description** fields, and a change's **Cover Page** tab includes **Originator**, **Status**, and **Reason For Change** fields.

Some tabs have fields and tables where you enter data; some fields and tables are filled in automatically.

The following figure shows a typical object page in Agile Advantage.

Figure 1-3: Item Number 1000-02 in Agile Advantage



Routable Objects

Any object that is routed for approval is a *routable object*. The user who oversees the routing and approval process is the *routing manager*. Routing managers are designated by the administrator or selected manually by the Agile Advantage user from a drop-down list. Routing managers evaluate and assign routable objects, and they receive email notifications pertaining to the objects to which they are assigned.

The following table lists routable objects and the corresponding routing manager.

Table 1-4: Routable Objects and Routing Managers

Routable object	Default routing manager
All changes except MCOs	Change Analyst
MCO	Component Engineer
Package	Program Manager
Problem report	Quality Analyst
Issue	Quality Analyst
Corrective action request	Quality Administrator

Change Control Process

This section covers the following topics:

- Objects and Change Control
- Change Control Tasks
- A Typical Change Control Process

Objects and Change Control

Item objects are under change control. After an item is released, to modify its **BOM** or **Manufacturers** tab, you must create a change against the item.

The **Title Block** tab and its **Page Two** section of items are not under change control; with the appropriate privileges, you can edit them at any time. Site objects and manufacturing objects also are not under change control.

Change Control Tasks

With the necessary server licenses, you can create changes against items and route them for approval. Agile Advantage lets you electronically:

- Approve or reject the routed changes
- Attach comments to changes
- Change the lifecycle phase of an item without changing its revision (MCO)
- Add manufacturer data on an item

- Delete manufacturer data on an item
- Edit manufacturer data on an item

A Typical Change Control Process

Agile Advantage supports change control processes, including default and custom Agile workflows. Change control workflows automate routing and approval processes. Your Agile administrator can create workflows specifically for your company. A custom workflow may include multiple Submit and Review status types. For more information, see Chapter 6, "Changes."

The following is an example of a typical change control process for a change using Agile workflows:

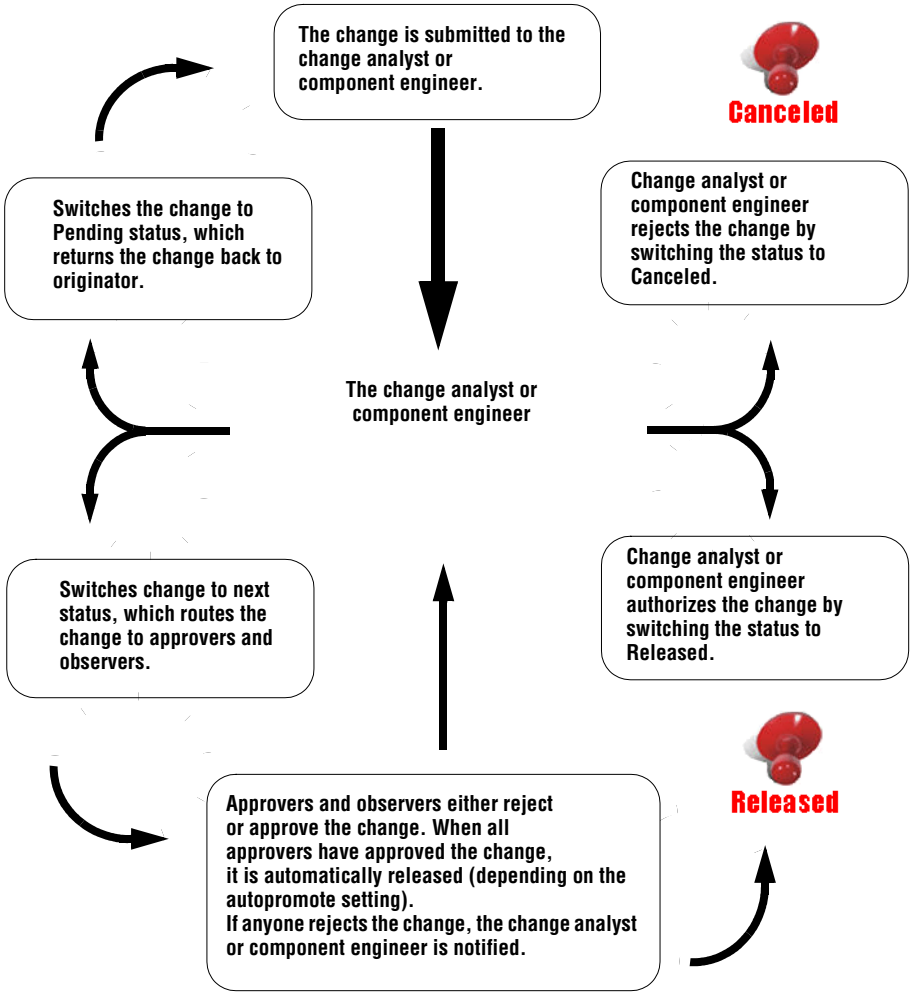
1. A change (for example, an ECO or MCO) is created, and a workflow is selected.
2. The change is submitted to the change analyst (ECO) or component engineer (MCO).
3. The change analyst or component engineer switches the change to the next status, which routes the change to the specified approvers (members of the change control board) and observers.
4. The members of the change control board (CCB) enter their approval or rejection on the **Signoff** tab of the change.
5. If all the approvers approve the change, it is automatically promoted to the Released status (depending on the autopromote setting).

   If any approvers reject the change, the change analyst or component engineer is notified and either:

   - Cancels the change by switching the status to Canceled.
   - Returns the change to the originator by switching the status to Pending.
   - Releases the change in spite of the rejection.

Figure 1-5 illustrates this change control process. Agile packages can follow the same process.

Figure 1-5: Change control process using default Agile workflows



For more information about the change control process, see “Change Workflows” on page 15-1. “Agile Change Control Workflows” on page 6-20 tells more about Agile workflows.

Quality Management Process

The Agile Quality Management product features comprise a comprehensive set of tools that allows corporations to track and manage quality data across the enterprise. This includes customer complaints, product and manufacturing defects, field failures, and enhancement and corrective action requests. For information about the quality management process, see "Quality Management Process" on page 7-19.

Product Sourcing Process

The Agile Product Sourcing features enable users to define and manage their Approved Vendors List (AVL) across the enterprise. This includes supplier records and supplier parts. For information about the product sourcing process, see "Manufacturing Objects: Manufacturers and Manufacturer Parts" on page 4-5.

Other Important Concepts

Familiarity with the following concepts will help you use the full features of Agile Advantage; for more information about any of these topics, see the appropriate sections of this manual:

- Bills of Material
- Approved Manufacturers List
- Attachments
- Searching for Objects
- Inbox and Other Folders
- Affected Items
- Workflows
- Redlining BOMs, Manufacturers, and Attachments
- Agile Packages
- Soft and Hard Object Deletions

Bills of Material

Bills of material (BOMs) show all the items that make up the current part. Documents may have bills of material or not, depending on your system settings. Items on a BOM can be single items or assemblies of several items.

The BOM for each part appears on its **BOM** tab.

Approved Manufacturers List

An approved manufacturers list (AML) is the list of manufacturers that have been approved to supply a particular item. The list identifies the manufacturer part for that item.

The AML for a part appears on its **Manufacturers** tab.

Attachments

Files and URLs that describe an object can be placed on the **Attachments** tab.

Attached files can be:

- Drawing files or scanned image files in viewable formats
- Files such as documents, non-viewable files, compressed (ZIP) files, and so on

All objects have an **Attachments** tab. You can use the **Attachments** tab to add, view, delete, and print attachments. You can also check in and check out attachments.

With appropriate roles and privileges, you can mark up or redline an attached file in the Agile View & Markup.

> **Note** The default maximum size for attachments is 300MB. This value can not be changed in Agile Administrator 2006.

Searching for Objects

When you want to find a particular object or objects, you perform a search. Agile Advantage provides several types of searches:

- Agile Web Searches find all the objects that have a particular value in one field.
- Advanced Searches find all the objects with fields that match the conditions of the search. For example, you could search for parts where the **Description** field contains "Computer."

- Where-Used searches find the assemblies where the specified item is included on the BOM of the assembly.

For instructions about searching for objects using Agile, see "Finding Agile Objects" on page 2-7.

Inbox and Other Folders

As routable objects pass through the Agile Advantage system, users receive news of status changes through email. Users with different roles and privileges receive different notifications. When you first start Agile Advantage, it is a good idea to view your Inbox.

Note Make sure Agile email notifications are not considered as Junk by your email clients: if so, add your Agile email domains to your email clients' safe list.

Affected Items

The **Affected Items** tab lists the items that are affected by a change. Users with sufficient privileges can use the **Affected Items** tab to:

- List the items affected by an ECO and give those items a pending revision (or "rev")
- Open the affected items
- Work with BOM, manufacturer, and attachment redlines

The **Affected Items** tab of a corrective action request (CAR) has two tables. One table lists the items that are affected by the CAR. This table is editable. The other table, which is uneditable, lists the items that are referenced by problem reports and issues associated with the CAR.

Workflows

An Agile Advantage workflow is a sequence of statuses that a routable object follows as it goes through the change control process.

Workflows automate the change control and quality tracking processes by performing or completing tasks that were previously performed manually. For example, when a change is released, Agile users on the notification list automatically receive email announcing this news.

Your Agile administrator specifies the name of the workflow, the number and names of the statuses, and the properties that define each status.

Redlining BOMs, Manufacturers, and Attachments

When you redline a BOM, you change it in some way. For example, you can add or delete parts and assemblies from the BOM or change quantities of existing parts. Likewise, when you redline an AML, you can change associated manufacturer parts information. When you redline an attachment, you mark it up in the Agile Viewer by adding new drawing lines, adding annotations, or adding measurements.

Redlining activities begin on the **Affected Items** tab of an ECO (for BOMs, AMLs, or attachments), or MCO (for AMLs).

Agile Packages

Agile packages are sets of product information that can be created, viewed, and routed through the Agile Advantage system to users up and down the supply chain.

For example, suppose an electronic manufacturer service (EMS) provider must receive a certain set of documents to respond to a request for quotation from an original equipment manufacturer (OEM). The EMS defines the required documents in Agile. OEM employees then log in to Agile via the Web, where they create Agile packages and are prompted to attach the required files. The Agile packages are then submitted to the program manager at the EMS. The EMS is immediately notified when the OEM submits the packages. The EMS can then review the packages and their contents. The packages then pass through workflow stages in the Agile Advantage system, where they can be routed for review, accepted, or returned to the submitting partner if additional work is needed. OEM personnel can monitor all of this activity anytime they log in to Agile via the Web for that EMS provider.

Soft and Hard Object Deletions

The Agile Advantage Web Client supports “soft” deletions.

When you delete an object for the first time, the action is a soft deletion. When you soft-delete an object in the database, it is not permanently deleted. A soft-deleted object is marked "Deleted" in the database, and its object number is reserved. You can hard-delete an object only in the Agile Advantage Windows Client. You cannot create another object of that type with the soft-deleted object's number unless you first hard-delete it in the Agile Advantage Windows Client.

Note You *can* undelete a soft-deleted object.

When you run a search, soft-deleted objects do not appear in the search results table. To locate soft-deleted objects, you must have the appropriate privileges. If you have the appropriate privileges, you can run the predefined deleted object searches in the Change Analyst Searches folder to locate soft-deleted objects.



CHAPTER 2
Basic Tasks

This chapter describes how to get started with Agile and how to perform several basic and essential tasks.Topics include:

- *Launching Agile Advantage Web Client*
- *Agile Advantage Web Page*
- *Agile Advantage Web Folders and Menus*
- *Agile Advantage Web Client Editable Tables*
- *Bookmarking Agile Advantage in Your Web Browser*
- *Logging Out*
- *Getting Help*
- *Agile Advantage Web Session Timeouts*
- *Finding Agile Objects*
- *Viewing Agile Objects*
- *Modifying Date Fields*
- *Printing Objects*
- *Emailing Objects*
- *Using the Address Book*
- *Passwords*
- *Changing Your User Profile*

Launching Agile Advantage Web Client

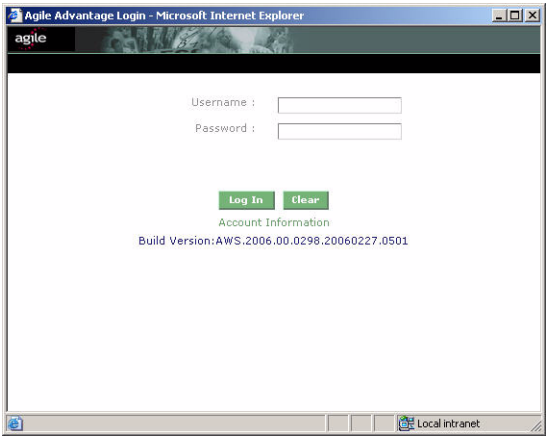
To start the Agile Advantage Web Client:

1. Start your browser.
2. Click the Agile Advantage bookmark, if one exists, or type the URL.
   For example:

   ```
   http://aa.domainname.com:8010/AgileAdvantage/HcmServlet
   ```

   The **Login** page appears.

Figure 2-1: The Login Page



3. Enter your username. Your username is not case-sensitive.
   Your *username* is assigned by your Agile administrator and is usually an abbreviation of your full name. For example, the name Michael Jones may be abbreviated to MICHAELJ or MJONES.
4. Enter your password. Your password ***is*** case-sensitive.
   Your password is initially assigned by your Agile administrator. You can change your password at any time. The administrator may require you to do so within a set number of sessions. See "Changing Your Login Password" on page 2-19.
5. Click the **Log In** button. If you make a mistake, click **Clear** and retype your username and password.
   The login process is complete.

6 The first time you log in, the **User Profile** page appears. Enter the requested information.
If you need help, click **more...** at the end of the page tip.

7 When you have finished, click **Save**.

8 After you complete this information, the Agile Advantage **Welcome** page appears.

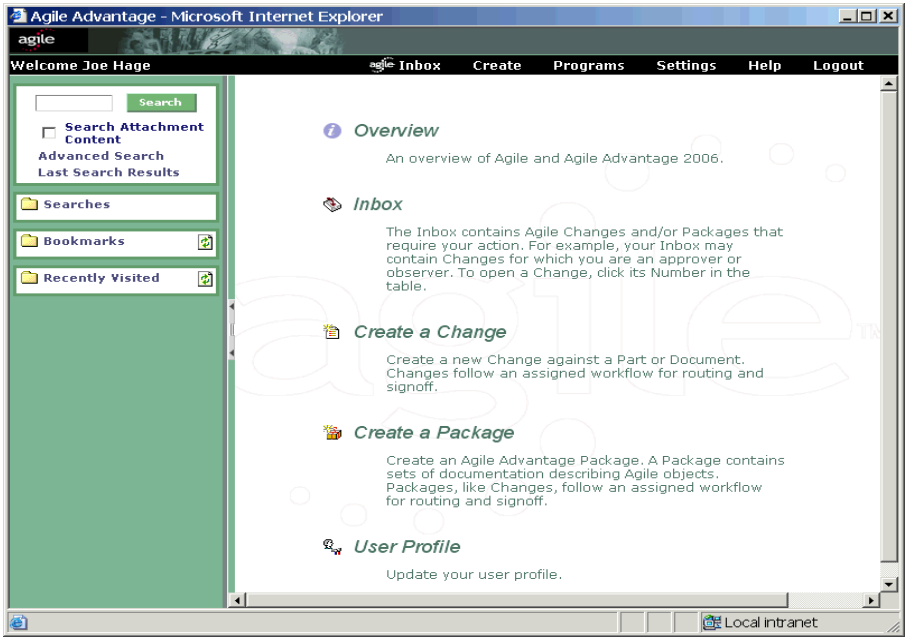
Note By default, the Agile Advantage Web client runs in a full popup window. If you have a popup blocker, it will run in a regular browser window. If you are using Microsoft Internet Explorer, you can maximize your Agile Advantage workspace in the browser by pressing the <F11> function key to put your Internet browser into full screen mode.

For information about searching for objects, reading email notifications, and navigating through Agile, see "Finding Agile Objects" on page 2-7.

Agile Advantage Web Page

The Agile Advantage Web page has two main panes: a smaller left pane and a larger right pane.

Figure 2-2: The Agile Advantage Web Page



The left pane provides access to web searches, advanced search creation, search folders, bookmarks, and the last ten recently visited objects. When you start the Agile Advantage Web client, the right pane shows the **Welcome** page. You can choose from the list of activities it offers or choose another in the left pane or from the menu bar.

The **Recently Visited** folder, in the left pane, lists the last 10 objects that have appeared in the right pane. You can click one to open it. In this way, the **Recently Visited** folder lets you quickly retrace your steps.
You can hide or show the left pane by clicking the hide tool between the panes.

Agile Advantage Web Folders and Menus

The folders in the left pane and the menus at the top of every page help you display and work with objects in Agile Advantage.

This section contains the following topics:

- Agile Advantage Web Folders
- Agile Advantage Web Menus

Agile Advantage Web Folders

The left pane of the Agile Advantage Web page contains the following folders:

- **Searches** — Pre-defined system searches and searches you have created; select one to view a list of search results. My In-box holds all the changes and Agile packages that require your review and action. For more information about saved searches, see Chapter 12, "Searching for Objects."
- **Bookmarks** — Objects you have bookmarked for quick display later. To bookmark an object, choose **Actions | Bookmark** on the right side of the page.
- **Recently Visited** — The last 10 objects you have viewed; click one to display it.

Agile Advantage Web Menus

The Agile Advantage Web client has two sets of menus: those in the menu bar above the right pane and the **Actions** menu to the right of object tabs in the right pane. Depending on your assigned licenses, roles, and privileges, you can use the following menus to perform various tasks:

- **Inbox** — Display Agile changes and packages that have been submitted to you.

- **Create** — Create new items, changes, manufacturers, manufacturer parts, and Agile packages.
- **Programs** — Link to the Agile Product Management module.
- **Settings** — Define your user profile, change your password, assign tasks to other users while you are out of town or otherwise unable to access them, and organize your bookmarks, searches, and address book entries. If you are a user administrator, you will see User Administrator options on the Settings page.
- **Help** — Choose **Documentation** to access the Agile Advantage user manuals. Choose **About** to see technical information about the current release of Agile Advantage.
- **Logout** — Logout and exit the Agile Advantage Web client.
- **Actions** — For items, print the current object, create an Agile package, send the current object to other users, copy the current object by saving it under a different name, delete the object, bookmark the object, and incorporate or unincorporate the object. For other objects, the **Actions** menu offers similar activities appropriate for each object.

Agile Advantage Web Client Editable Tables

There are a number of tables in the Agile Advantage Web Client on which you can perform certain actions. For example, on the Affected Items table, you can delete items. These tables have checkboxes in the left column. You check the boxes next to the items on which you want to perform the action.

If a table with checkboxes is more than one page long, you must act on each page separately.

For example, to delete items from the Affected Items table that spans two pages:

1. Go to the first page and select all the items you want to delete.
2. Click **Delete**.
3. Go to the next page and select all the items you want to delete.
4. Click **Delete**.

Bookmarking Agile Advantage in Your Web Browser

After Agile Advantage starts in your browser, you can bookmark it to create a startup shortcut. Create a bookmark or a favorite, then click it the next time you want to open the Agile Advantage Web client Login page.

To create a bookmark in Microsoft Internet Explorer:

1. Click the **Favorites** menu.
2. Choose **Add To Favorites.**
3. If you want, select or create a folder in which to place the bookmark.
4. Click **OK**.

As you work in the Agile Advantage Web client, you can create a list of bookmarks to help you view important objects later. For instructions, see "Using Bookmarks" on page 2-9.

Note You can also create a shortcut on your desktop to simplify logging in. Follow the instructions in your browser's Help system. For Internet Explorer, click the **e** icon in the URL address line and drag it to your Windows desktop.

Logging Out

To log out of the Agile Advantage Web Client:

1. From the Agile Advantage Web client menu bar, choose **Logout**.
2. Respond **OK** to the logout prompt.
3. If you click the **Log In** button or wait 10 seconds, you'll automatically return to the Login page. To exit, either close the browser or enter another URL to visit.

Getting Help

As you work with the Agile Advantage Web interface, you can get several kinds of online documentation at any time.

For general information about the Agile Web Client:

1. Choose **Help | Documentation.**
2. You will then login to the Agile support Web site to obtain the appropriate documentation.

For information about the version of Agile Advantage you are using:

Choose **Help | About.**

This information can help with troubleshooting.

Agile Advantage Web Session Timeouts

Agile Advantage Web sessions are set to time out, or disconnect, after a session is idle for a specified period of time. If you are interrupted while you are in the middle of a wizard operation (such as creating a change), and the session is idle and times out, your information will be lost. If you try to perform an Agile action after the session has timed out, the login page appears.

Occasionally, if you try to perform an action in Agile Advantage after a timeout, you may see a second, smaller Agile Advantage Web page. If this happens, simply close all dialog boxes and pages and log in again.

Finding Agile Objects

Objects can be either items (parts or documents), changes (ECOs, ECRs, deviations, stop ships, or MCOs), or manufacturing objects (manufacturers or manufacturer parts). See "Viewing Agile Objects" on page 2-10 for more information about what you see when you open an Agile Advantage object.

These topics help you find, open, and return to Agile Advantage objects:

- Using the Search Pane
- Using Saved Searches
- Viewing Search Results
- Using Bookmarks
- Using the Recently Visited List

Using the Search Pane

To quickly locate and open a particular object in Agile Advantage with a Web search:

1. Enter the first part of the object's ID number or a word in its description in the **Search** field at the top of the left pane. The search is not case-sensitive. You cannot use wildcards in this search.
2. Click the **Search** button.

To perform an advanced search using search criteria:

1. Click **Advanced Search** below the **Search** field.
2. Follow the instructions starting on page 12-14, "Creating an Advanced Search."

To view the results of the last search you performed:

Click **Last Search Results** below the **Search** field.
This runs the last search query. If the last search returned 0 results, the next-to-last search results appear.

Using Saved Searches

To use searches shipped with Agile Advantage, created by your Agile administrator, or saved by you:

1. Click **Searches** in the left pane of the Agile Advantage Web page to display folders of saved searches.
2. Click the name of the folder that you want to open.
3. Click the name of a search in that folder to run it.
Results appear in the right pane.

Viewing Search Results

When you run a search, the results appear on the Search Results page.

To open an object on the Search Results page:

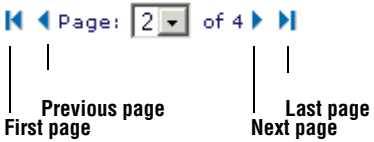
Click its number.

To print a list of objects found by the search:

Click the **Print** button in on the Search Results page.

To scroll through multiple pages of search results:

Use the navigation buttons:



Note The maximum number of search results that the Agile Web client displays is 1000, even if the Max Query Result Displayed property in Administrator is set to greater than 1000.

Using Bookmarks

The **Bookmarks** folder in the Agile Advantage left pane can help you return to important objects that you need to open often.

To bookmark an object:

1. Open the object in Agile Advantage.
2. Open the **Actions** menu on the right side of the page, and choose **Bookmark**.



The object's number is saved in the Bookmarks list in the left pane of the Agile Advantage Web page.

To open a bookmarked object:

1. Click **Bookmarks** in the left pane of the Agile Advantage Web page.
2. Click the object's number in the list of bookmarks.

To delete a bookmark:

1. Choose **Settings** on the menu bar to display the User Settings page.
2. Click **Delete Bookmarks**.
3. On the **Delete Bookmarks** page, check the bookmarks you want to delete.
4. Click **Delete**.

Using the Recently Visited List

When you view an object during a work session, it is listed in the Recently Visited list.

To open a recently visited object:

1. Click **Recently Visited** in the left pane of the Agile Advantage Web page.
2. Click the object's number in the list.

Viewing Agile Objects

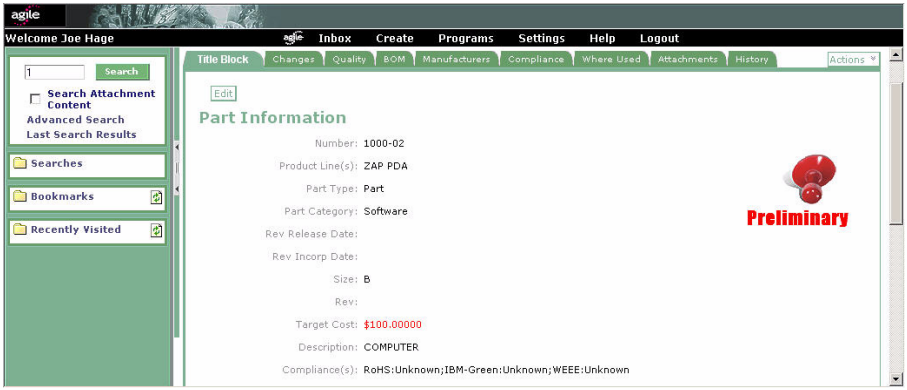
Objects can be either items (parts or documents), changes (ECOs, ECRs, deviations, stop ships, or MCOs), manufacturing objects (manufacturers or manufacturer parts), PSRs (problem reports or issues), corrective action requests (CARs), or packages.

When you locate and click an object, a page with tabs appears and displays information about that object, as shown in Figure 2-3.

The tabs and fields that you see depend on the object type. For more information, see:

- "Item Page" on page 3-2
- "Change Page" on page 6-3
- "Manufacturing Objects: Manufacturers and Manufacturer Parts" on page 4-5
- "Customers" on page 7-4
- "Problem Reports" on page 7-7
- "Issues" on page 7-12
- "Corrective Action Requests" on page 7-13
- "The Agile Package Page" on page 11-2

Figure 2-3: Viewing an Item



About Discovery and Read Privileges

Together, the Discovery privilege, the Read privilege, and the Enforce Field Level Read privilege determine which Agile Advantage objects you can find and open, and which object fields you can view.

The Discovery privilege lets you discover the existence of an object in the Agile Advantage database. If you do not have Discovery privilege for an object, you cannot view the object, and you cannot find, or discover, the object in the Agile Advantage database.

Once you have the privilege to discover an object, your Read and Enforce Field Level Read privileges for that object determine whether you can open and view it, and which individual fields you can view. You may be able to read an object, but you may not have Read privilege for every field of that object. So it is possible for you to open an object and, at the same time, be unable to view specific fields of that object.

For more information about the Discovery and Read privileges, see “Details About the Discovery and Read Privileges” on page 15-2.

Modifying Date Fields

You can modify date fields using the calendar or manually by typing. This section contains the following topics:

- Using the Calendar to Modify Date Fields

- Manually Modifying Date Fields

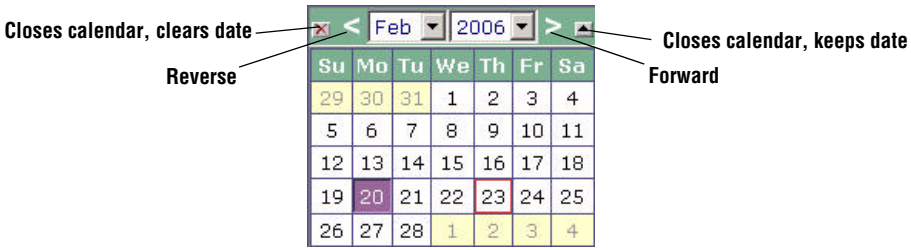
Using the Calendar to Modify Date Fields

To use the calendar:

1. In a date field, click  to open the calendar (if available).
2. Select a date from the calendar.
   Agile enters the new date and sets the timestamp to 12:00:00 AM.

   Note The default time format is 12 hours with AM and PM.

Figure 2-4: Calendar



To switch to a different month or year:

- Click the **Forward** or **Reverse** button to switch to an adjoining month.
- Click the **x** button to close the calendar and clear any date you entered.
- Click the **^** button to close the calendar and keep your date entry.

Manually Modifying Date Fields

To edit the date and time:

1. Select the date and time you want to change.
2. Enter the new date in the format specified in your user profile (by default, dd-mm-yyyy).
3. Press the Spacebar.
4. Enter the time in the format specified in your user profile. This step is optional; if you do not enter a time, by default the time displays midnight in the specified format.

Note The Agile Advantage Web client does not accept the new date without a space between the date and time.

To edit just the timestamp:

1. Select the time you want to change.
2. Enter the new time in the hh:mm:ss format.
3. Press the Tab key or the Enter key.

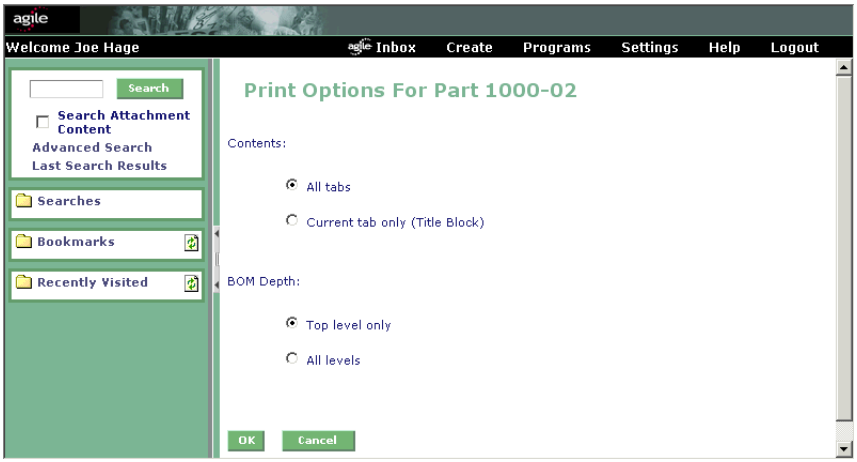
Printing Objects

You can print any tabbed object in the Agile Advantage Web client.

To print an object:

1. Open the object.
2. Choose **Print** from the **Actions** menu on the right side of the page.
3. Indicate whether you want to print all tabs or just the current tab. If you're printing the **BOM** tab, indicate how many BOM levels to print and whether you want to print in HTML or a tab-separated text format.

Figure 2-5: The Print Options Page



4. Click **OK**.

Emailing Objects

You can email any Agile Advantage object. The mail message contains an icon that represents the mailed object. If the recipient has the Agile software, the recipient can double-click the icon to view the object.

Note Your Agile administrator determines what types of email attachments you are configured to receive.

To email an Agile Advantage object:

1. Select the object.
2. Choose **Send** from the **Actions** menu on the right side of the page.
   An **Available Users** list appears on the Send page. Use the right arrow to move names to the **Selected Users** list.
3. Enter any comments in the **Comments** field.
4. Click **Send** to mail the object.

Using the Address Book

This section contains the following topics:

- Overview of the Address Book
- Selecting Users from the Address Book
- Adding Address Groups
- Deleting Address Groups
- Editing Address Groups
- Working with Escalations

Overview of the Address Book

The address book lists all the individuals who use Agile Advantage, as well as departments and groups.

When you email objects or send notifications, you can select recipients singly or in groups. When you select a department or group, all the members of the department or group receive the email message.

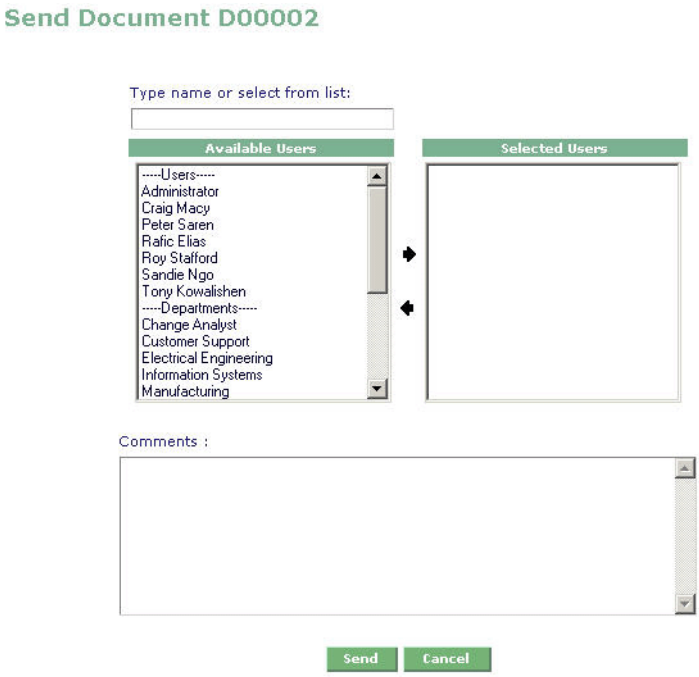
You can access the address book from the **Settings** menu, or when you are performing actions that involve sending an object or a notification (e.g. routing a change). You can select individual users, departments, or groups.

Selecting Users from the Address Book

To select a user when routing a change or Agile package:

1 On the **Change Status** page, click ... .
The address book appears.

Figure 2-6: The Address Book



2 Type the name in the field above the lists, or select a person, department, or group in the **Available Users** list.

3 Use the ➡ button to move your selection into the **Selected Users** list.

4 Continue selecting names and using the arrows until the **Selected Users** list is correct.

5 Click **OK**.
The recipients are placed in the appropriate field of the **Change Status** page.

Note If a group that's added to the **Selected Users** list contains other groups, every user in those other groups also receives the notification.

Adding Address Groups

To add a new group to the address book:

1 Choose **Settings | Address Book**.

2 The **Address Book** page appears.

3 Click **Create**.
The **Create User Group** wizard appears.

4 Type the name of the new group, and select a group type: Global Group or Personal Group.

5 Click **Next**.
The address book appears on the **Create User Group** page.

6 Select names in the **Available Users** list, and use the arrows to move them into the **Selected Users** list.

7 When you have selected all the users you want to include in the new group, click **Finish**.
The new group appears on the **Address Book** page.

Deleting Address Groups

To delete a group from the address book:

1 Choose **Settings | Address Book**.

2 The **Address Book** page appears.

3 Select a group by checking the box in front of its name.

4 Click **Delete** and respond **OK** to the confirmation prompt.
The selected group is deleted.

Editing Address Groups

You can edit the groups you have created.

To edit a group in the Agile Web client:

1. Click **Settings > Address Book.**
2. The **Address Book** page appears.
3. Click the name of the group you want to edit.
   The **Group** page appears.
4. On the **General Information** tab, you can click **Edit** to change the name or type of the group.
5. You can click the **Users** tab to add or delete users. On the **Users** tab, click **Add** to add another user. To delete a user, check the box in front of the name, and click **Delete.**
6. To create or modify escalations, click the **Escalations** tab. Then follow the instructions in the next section, "Working with Escalations."

   Note There is no designated escalation person for a personal group.

7. When your edits are complete, click **Save** to save the group.

Working with Escalations

Escalations allow changes to be forwarded automatically to a designated user if the group does not respond within a set amount of time.

Note There is no designated escalation person for a personal group.

To create an escalation:

1. Click **Settings | Address Book.**
2. The address book page appears.
3. Click the name of the group you want to edit.
   The **Group** page appears.
4. Click **Create** to set up an escalation for the group. Then select an escalation criteria and one or more users to be notified for that criteria. You can select a different person for each criteria, if you want. Click **Save** when your selections are complete.
5. To edit an escalation, select it on the **Escalation** tab and click **Edit.** Add users to or remove them from the **Selected Users** list, and then click **Save.**
6. To delete an escalation, select it on the **Escalation** tab, and click **Delete.** Respond **OK** to the confirmation when it appears.

Passwords

Depending on how your Agile administrator has configured your password settings, you may have two separate passwords for login and approval, or you may have one password for both login and approval.

If you use both Agile clients (Windows and Web), your username and approval passwords are the same for both applications.

This section includes the following topics:

- Password Security
- Login Security
- Changing Your Login Password

Password Security

Depending on how your Agile administrator has configured the Agile Advantage account policy settings, you may be required to follow certain rules when creating a password. These rules include the following:

- Your passwords expire after the specified number of days has passed. When your passwords expire, you are prompted to change them the next time you log in.
- You may not be allowed to change your passwords before the specified number of days has passed.
- You must follow one or more of the following rules when selecting your password:
  - Password must have at least one numeric character.
  - Password must have at least one lowercase letter.
  - Password must have at least one uppercase letter.
  - Password must have at least one non-alphanumeric character (for example: ! @ # $ % ^ & *).

If the password you select does not match the password rules, the Agile Advantage system prompts you to select a password that does match the rules.

Login Security

For system security, your Agile administrator may configure the Agile Advantage system so that you are not allowed to log in after a specified number of password failures (entering the wrong password). The lockout applies to both your login password and your approval password.

Depending on system settings, one of the following occurs:

- The login lockout lasts until a specified time has passed (for example, one minute).
  After the specified time has passed, a small Login dialog box appears, telling you that there have been too many login failures. Click **OK** and continue.
- The login lockout lasts until your Agile administrator unlocks your account by changing your password. If you are locked out, Agile client hangs for the time period specified by the Agile administrator (for example, one minute) each time you attempt to log in.

Changing Your Login Password

These instructions describe how to change your login password. If you have separate login and approval passwords, see your Agile administrator for information about changing your approval password.

To change your login password:

1. Click **Settings > Change Password**.
2. The **Change Login Password** page appears.
3. Type your old login password in the **Old Password** field.
4. Type your new login password in the **New Password** and **Confirm New Password** fields. Passwords are case-sensitive.
5. Click **OK**.
   If you have not followed the rules defined on your Agile system for selecting passwords, you are prompted to correct your password. See the preceding section, "Password Security" on page 2-18.

Changing Your User Profile

Your user profile contains a variety of information about how to contact you, your Windows date and time preferences, and several Agile Advantage on-screen display preferences. You have an opportunity to enter information when you first log in to Agile Advantage.

To edit or add information to your user profile:

1. Open your user profile by clicking **User Profile** on the Welcome page, or click **Settings | User Profile**.
2. Click **Edit** to enter edit mode.
3. Use the lists, browse buttons, and text boxes to enter the requested information. For a description of each setting, click **more...** at the end of the page tip.
4. When your information is complete, click **Save** to save the user profile.

Note If your Agile administrator has granted you user administrator roles and privileges, you can see additional information on the Settings page. For details, see Chapter 13, "User Administrator."



CHAPTER 3

Items (Parts and Documents)

This chapter describes Agile Advantage items and actions you can perform on them.

The major topics are:

- *Item Page*
- *Viewing a Different Revision*
- *Creating Agile Items*
- *Saving a New Item*
- *Working with Pending Revisions*
- *Deleting Items*
- *Editing Items*
- *Releasing an Item to Production*
- *Incorporating and Unincorporating Items*
- *Printing Item Tabs*

Item Page

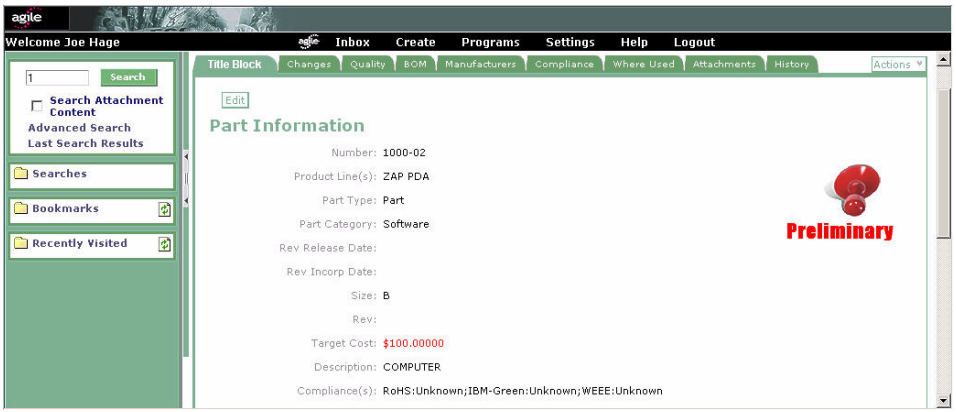
Agile Advantage items can be parts or documents. In general, if the document is shipped as part of a product, or it has costs associated with it, create it as a part object. If the document is an internal document, procedure, or reference, create it as a document object. In some cases, you may want to create a document as a part. For examples, see “Part versus Document?” on page 15-4.

To locate and open an item, follow the instructions in “Finding Agile Objects” on page 2-7.

A typical item is shown in the next figure. Remember, your Agile administrator might have changed the Agile interface, so the page may look different in some ways.

Note The following figure shows the **Quality** tab, which does not appear if your company is not licensed to use quality tracking features. For information about the **Quality** tab of items, see “Quality Management Tabs and Fields on Agile Objects” on page 7-21.

Figure 3-1: An Item



This section includes the following topics:

- Title Block Tab
- Changes Tab
- BOM Tab
- Manufacturers Tab

- Where Used Tab
- Attachments Tab
- History Tab

Note For information about the **Quality** tab of items, see "Quality Management Tabs and Fields on Agile Objects" on page 7-21.

When you view an item, information about it appears on tabs in the right pane. The following table shows the tabs and the default fields for items. The page reference below the name of each tab indicates where that tab is discussed. Your Agile administrator may have added additional **Page Two** and **Page Three** sections to the **Title Block Tab.**

Table 3-1: Item tabs

Item tab name	Tab fields include	Tab information includes
Title Block Tab (page 3-4)	**Number, Product Lines, Part Type, Part Category, Rev Release Date, Rev Incorp Date, Size, Rev, Target Cost, Description**	General information about the item, unique class and subclass fields defined by the Agile administrator
Changes Tab (page 3-6)	Pending: **Number, Proposed Rev, Status, Description, Target Cost, Type** History: **Rev, Lifecycle Phase, Status, Rel Date, Inc Date, Effective Date, Obsolete Date, Type, Number, Description, Target Cost**	Any pending or released changes against the item
BOM Tab (page 3-8)	**Item Number, Item Description, Item Rev, Find Num, Qty, Ref Des, BOM Notes, Target Cost**	The item's bill of material
Manufacturers Tab (page 3-8)	**Mfr. Name, Mfr. Part Number, Mfr. Part Description, Mfr. Part Lifecycle Phase, Preferred Status, Reference Notes, Target Cost**	Manufacturer and manufacturer parts information about sources for that part
Where Used Tab (page 3-10)	**Item Number, Description, Find Num, Qty, BOM Notes**	Where the item is used
Attachments Tab (page 3-11)	**File Description, File Name, File Version, File Size, File Type, Modified Date, Last View Date, Checkout User, Checkout Date, Checkout Folder**	Attached drawings and files

Table 3-1: Item tabs (continued)

Item tab name	Tab fields include	Tab information includes
History Tab (page 3-12)	**Action, User, Local Client Time, Details, Comments**	Actions taken on the item, for example, when attachments were added and removed

The following sections describe the tabs listed in the preceding table.

Title Block Tab

The **Title Block** tab has fields that contain the information found on a typical paper-based title block. A typical **Title Block** tab is shown in Figure 3-1.

Some fields are filled in automatically; you complete the rest. You may not be able to edit the contents of some fields.

Depending on your privileges, you may modify the Title Block entries of an item with either no revisions released, or at least one revision released. See your Agile administrator if you have questions about privileges.

For information about editing the **Title Block** tab fields, see "Fields on the Title Block Tab" on page 3-4.

Fields on the Title Block Tab

By default, the **Title Block** tab contains the fields listed in the following table. Agile administrators can add custom class and subclass fields to the **Title Block** tab. These fields hold information that would appear on the **Page Two** and **Page Three** tabs in Agile Advantage Windows Client.

Table 3-2: Title Block fields

Field	Definition
Number	The item's number; automatically completed when the item is created.
Product Line(s)	The product group or groups that include this item; select from the list.
Part Type	The subclass of this item; automatically completed when the item is created. See "Changing an Item's Subclass" on page 3-21 for more information.
Part Category	The category that includes the item; select from the list.

Table 3-2: Title Block fields (continued)

Field	Definition
Rev Release Date	The date an item is released; automatically completed when the item is released.
Rev Incorp Date	The date an item is incorporated; automatically completed when the item is incorporated.
Size	Drawing size; select from the list.
Rev	The current revision of the item; automatically completed when the item is released. Includes a drop-down list of previous and pending revisions.
Description	Text that describes the item. By default, descriptions can be up to 100 characters, counting spaces and carriage returns (carriage returns count as two spaces).

Page Two and Page Three fields

Your Agile Administrator may add **Page Two** and **Page Three** fields on the **Title Block Tab**. The fields are customized, defined and named by your Agile Administrator. If you are uncertain about how to use these fields contact your agile Administrator.

Lifecycle Phase on the Title Block Tab

Agile uses a lifecycle stamp in the upper right corner of the **Title Block** tab to indicate the production lifecycle phase of an item. The out-of-the-box lifecycle stamps are shown next to each phase, below. What you see may differ, however, if your Agile administrator has customized the lifecycle names and stamps for your workplace.

The following table shows the defaults (out-of-the-box):

Table 3-3: Lifecycle Phases

Lifecycle stamp	Lifecycle name	Lifecycle definition
	Preliminary	The item has not been released.
	Prototype	The item has been released to be built in very limited quantities for testing.

Table 3-3: Lifecycle Phases (continued)

Lifecycle stamp	Lifecycle name	Lifecycle definition
	Pilot	The item has been released to be built in limited initial quantities.
	Production	The item has been released for regular production.
	Inactive	The item is temporarily not in use but may be reactivated.
	Obsolete	This item is no longer in use.

Viewing Different Revisions of the Same Item

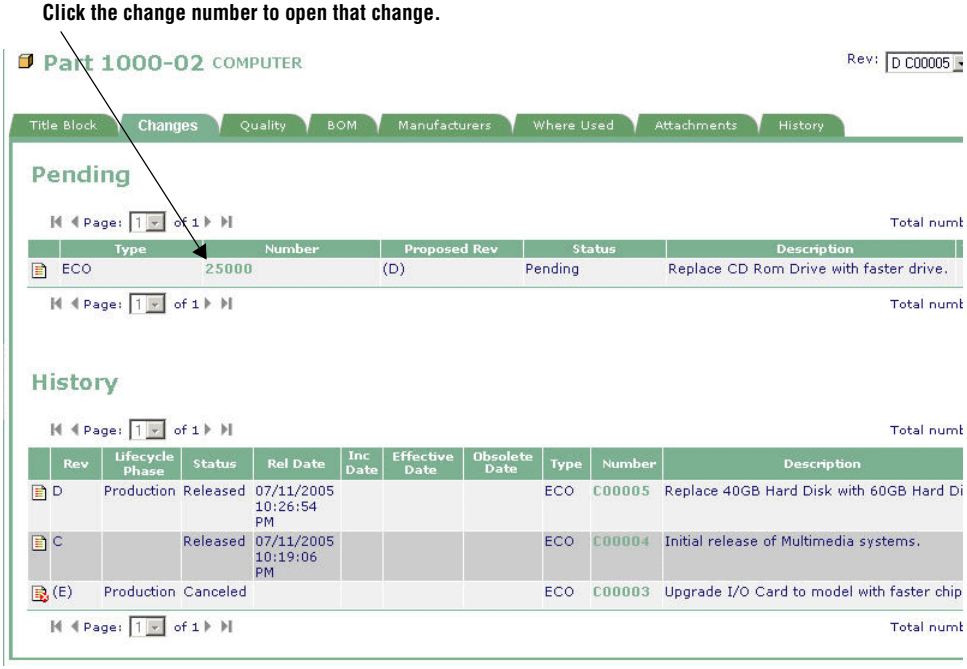
To view a different revision (or "rev") of an item, select the revision you want to view from the **Rev** drop-down list in the upper right part of the page. The tab fields are updated to reflect that revision of the item.

Changes Tab

The **Changes** tab, shown in the following figure, displays a list of changes related to the item you are viewing, displayed in two panes. The upper pane, Pending, shows pending changes, including changes on hold. The lower pane, History, shows released and canceled changes. Agile Advantage automatically fills in the information on this tab.

Note If you do not have Discovery privilege for a change, it does not appear on the **Changes** tab. You may see a message at the bottom of the page telling you how many changes are not displayed. For more information, see "Details About the Discovery and Read Privileges" on page 15-2. If you have questions about your Discovery or Read privileges, see your Agile administrator.

Figure 3-2: Changes Tab of an Item



Note Although its name is similar, the **History** tab shows actions made against an item, while the History table on the **Changes** tab lists released and canceled changes for the item.

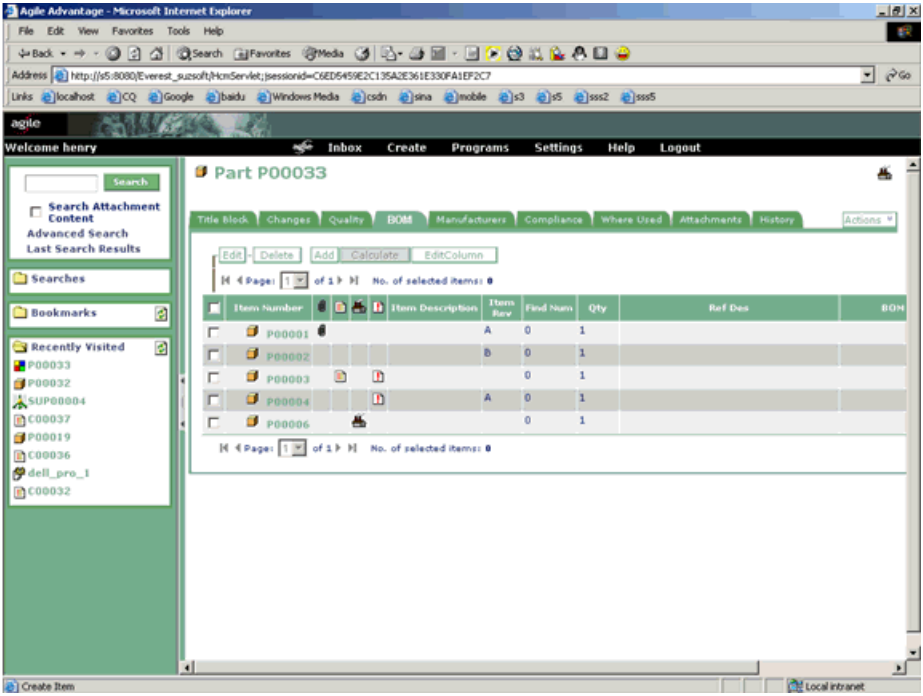
Viewing a Change on the Changes Tab

To open a change listed on the **Changes** tab, click its number, as shown in Figure 3-2. The change opens with the **Cover Page** tab on top.

BOM Tab

The **BOM** tab, shown in the following figure, lists all the items on an item's Bill of Material. For details on the **BOM** tab, see Chapter 8, "Bills of Material (BOMs)."

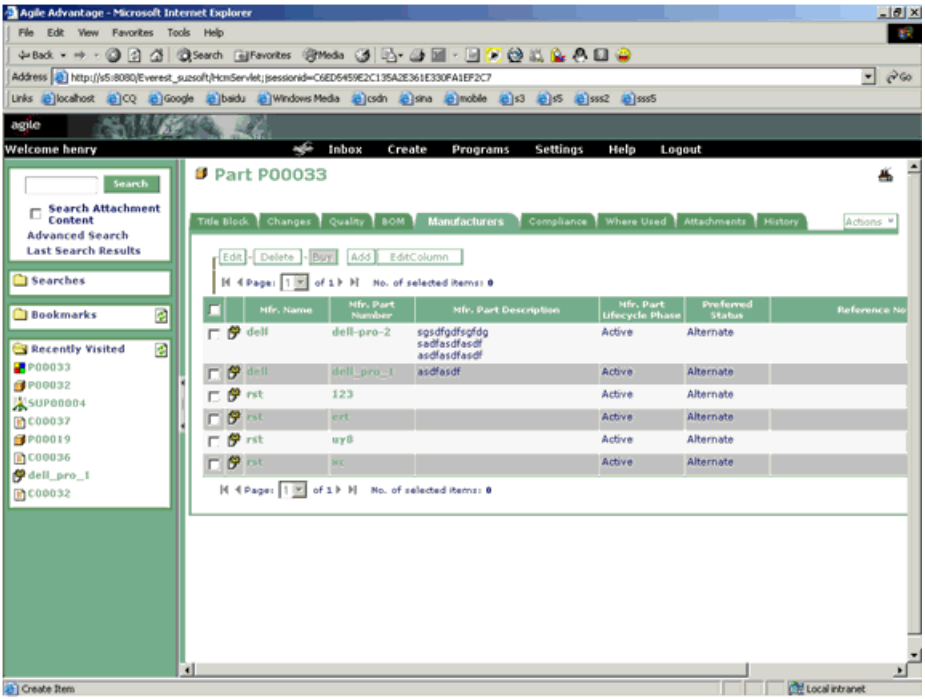
Figure 3-3: BOM Tab of a Part



Manufacturers Tab

The **Manufacturers** tab displays information taken from related manufacturer and manufacturer part objects. (See Figure 3-3.) If you have the appropriate privileges, you can use this tab to construct an approved manufacturers list (AML) for the item.

Figure 3-4: Manufacturers Tab of a Part



Note This tab may be hidden in systems not licensed to use the Manufacturer Management features.

The **Manufacturers** tab displays, in a sortable table, information about:

- The manufacturers who produce that part
- The manufacturer parts that they supply, including:
  - Whether the manufacturer part is the preferred or an alternate part
  - Whether they are currently an active manufacturer of that part
  - The manufacturer's part number corresponding to the part in the Agile Advantage system.

In the same manner that you can open listed items directly from other tab views, you can open listed manufacturer parts directly from the **Manufacturers** tab. Clicking the manufacturer part number in this table opens the manufacturer part with the **General Info** tab on top.

Note If you do not have Discovery privilege for a manufacturer, it does not appear on the **Manufacturers** tab. You may see a message at the bottom of the page telling you how many manufacturers are not displayed. For more information, see "Details About the Discovery and Read Privileges" on page 15-2. If you have questions about your Discovery privileges, see your Agile administrator.

As with the **BOM** tab on items, the Manufacturers table can be modified through a redline process if you have sufficient privileges. For details on working with the **Manufacturers** tab, see "Associating a Manufacturer Part with Its Corresponding Item" on page 4-15.

Managing the Columns of the Manufacturers Tab

You can customize the order of the **Manufacturers** tab columns by using the **EditColumn** button.

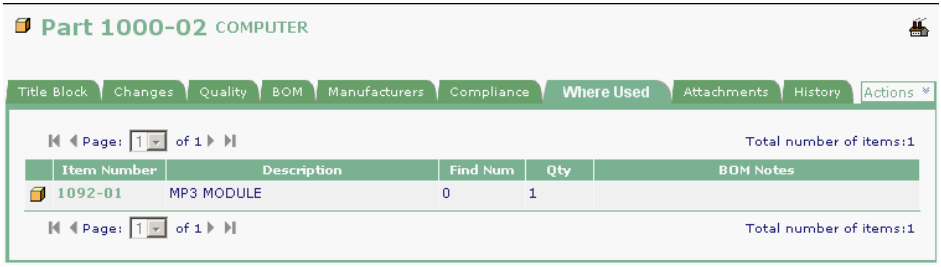
To modify the column order:

1. Click on the **Manufacturers** tab.
2. Click on the **EditColumn** button.
   The **Column List** dialog box appears.
3. To reorder a specific column, select it from the **Selected Values** pane, and do the following:
   a. Click on the up arrow to move the column to the left.
   b. Click on the down arrow to move the column to the right.
4. Click **OK** to save the new order and close the **Column List** dialog box.
   The changes are automatically mirrored on the **Manufacturers** tab.

Where Used Tab

The **Where Used** tab lists all the assemblies that use the item. Agile automatically completes this tab. The following figure shows a completed **Where Used** tab.

Figure 3-5: Where Used Tab



You can view an item on the **Where Used** tab by clicking its number.

Note If you do not have Discovery privilege for an item, it does not appear on the **Where Used** tab. You may see a message at the bottom of the page telling you how many items are not displayed. For more information, see "Details About the Discovery and Read Privileges" on page 15-2. If you have questions about your Discovery or Read privileges, see your Agile administrator.

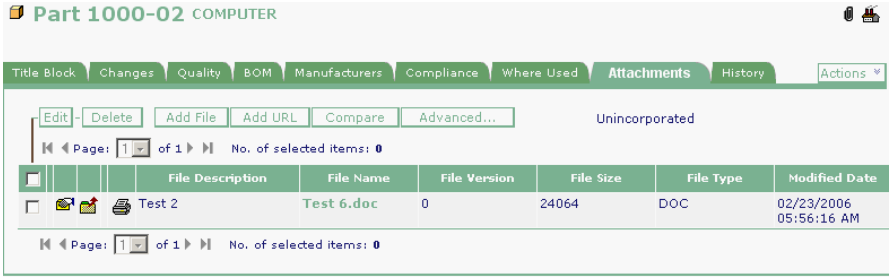
Attachments Tab

All objects have an **Attachments** tab. See Figure 3-6. The **Attachments** tab lists the files and URLs that have been attached to the item.

You can view any file attached to an object, provided you have been granted the appropriate privileges. If you have questions about your assigned roles and privileges, see your Agile administrator.

For detailed information about the **Attachments** tab, see Chapter 10, "Attachments."

Figure 3-6: Attachments Tab

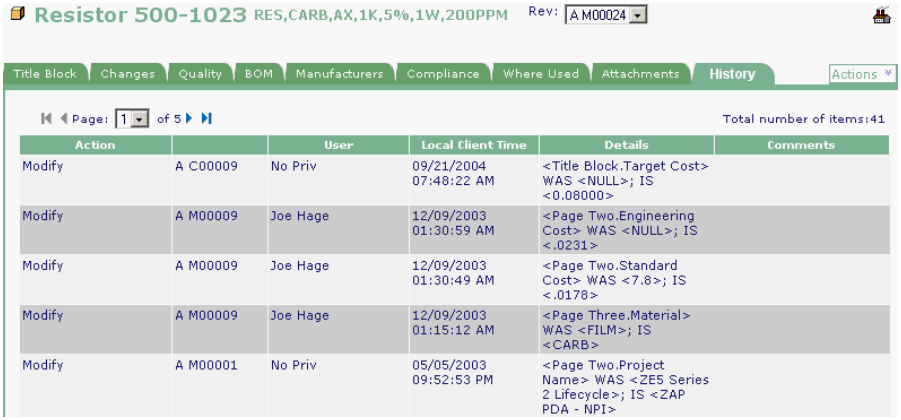


History Tab

The **History** tab shows a summary of actions taken against the item, including a description of the action, which user took the action, the date of the action, and other details. The following figure shows the **History** tab.

Note If you do not have the appropriate Read privilege for parts, you cannot see the contents of the fields on the **History** tab. See "Details About the Discovery and Read Privileges" on page 15-2. If you have questions about your privileges, see your Agile administrator.

Figure 3-7: History Tab



The **History** tab shows a summary of actions taken against the item, including:

- A description of the action
- Which user took the action
- The date and local client time of the action
- Details of the action
- Comments

The types of actions recorded are:

- Creating the item
- Attachment actions: view, open, add, delete, get, check in, check out, cancel checkout, incorporate, and unincorporate
- Save As
- Send

- Print
- Change subclass
- Modification of any field of a released item. Note that Field modifications are not recorded for preliminary items that have not been released.

Viewing a Different Revision

You can view a different revision of an object from an item page.

To view a different revision:

Select a revision from the **Rev** drop-down list near the top of the page.

When you select a different revision, *all* the tabs display information from the selected revision. For example, if the **BOM** tab is displayed, and you switch from Rev C to Rev B, the other tabs also show Rev B.

The ECO number is displayed next to its corresponding revision in the **Rev** drop-down list. For example, if ECO E54321 released Rev C of a part, then Rev C on the drop-down list reads "C E54321." A revision number or letter inside parentheses indicates that the revision is pending, not yet released. For more information, see "Working with Pending Revisions" on page 3-17.

An MCO does not create a new revision of a part; however, the MCO number is displayed next to the corresponding revision on the **Rev** drop-down list. For example, if there is a pending MCO M12345 against Rev B of a part, then on the **Rev** drop-down list, that revision is listed as "(B) M12345."

Creating Agile Items

This section contains the following topics:

- Creating Items Using the Create Command
- Creating an Item Using Save As
- Creating an Item Using Add

Creating Items Using the Create Command

Wizards are provided to help you with the process of creating an item and specifying the contents of BOM, manufacturers, and attachments.

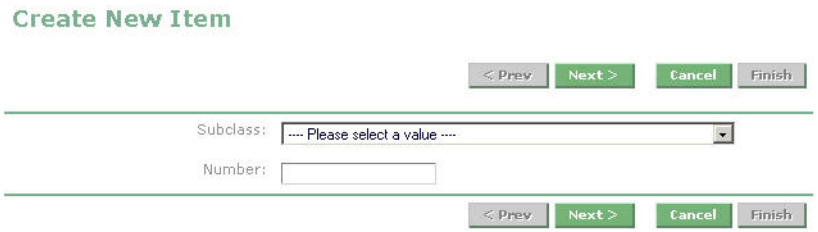
When you create an item, you select an item type (subclass) and assign a number. Then you complete it by entering data on its tabs. The Create wizard leads you through all the steps.

To create and complete an item:

1 Choose **Create | Item**.

2 On the Create New Item page, select a subclass from the list (part or document, by default).

Figure 3-8: The Create New Item page



Note Sometimes you may want to create a document as a part. See "Item Page" on page 3-2.

3 Type the number of the proposed item in the **Number** field.

Or click the **AutoNumber** button 123 to automatically enter the number. This provides a list of autonumber choices if multiple autonumber sources are available. The AutoNumber format and sequence are determined by your Agile administrator. Your Agile administrator also determines whether using autonumbers is required or optional.

4 Click **Next**.

Agile Advantage creates the item and displays the Enter Title Block Information page.

Note Once Agile Advantage creates an item, that item exists until you delete it.

If you create a new item, then decide you do not wish to keep it, be sure to delete the item; otherwise, the new item is still in the database and the number cannot be reused. See "Deleting Items" on page 3-19.

5 Complete any appropriate fields on the **Title Block** tab, and click **Next**. For details, see "Title Block Tab" on page 3-4. Information that goes on the **Page Two** and **Page Three** tabs is also entered here.

Or, if you have no other information to add to the item, you can click **Finish** to save the item and display it in the right pane.

6 If you clicked **Next**, you can add all appropriate items to the **BOM** tab. For more information, see Chapter 8, "Bills of Material (BOMs)."

7 Then either click **Finish** to complete the item, or click **Next** to add manufacturer information, provided you have appropriate privileges.

8 If you clicked **Next**, add all appropriate manufacturer parts to the **Manufacturers** tab. For details, see "Adding a Manufacturer Part to the Manufacturers Tab" on page 4-17.

9 Click **Finish** to complete the item, or click **Next** to add attachments.

10 If you clicked **Next**, add all appropriate files to the **Attachments** tab. For details see "Adding Attachments" on page 10-6.

11 Finally, click **Finish** to save the item.

You do not enter information about the **Changes**, **Where Used**, or **History** tabs. Agile automatically completes those tabs.

Creating an Item Using Save As

Using the Save As feature is a quick way to create an item that is very similar to an existing item.

Caution! In general, you should not use Save As to create an object in a different class or subclass from the original object. The different classes or subclasses may not have the same tabs or defined fields, and you may lose access to some data in the newly created object. See also "Changing an Item's Subclass" on page 15-5.

For example, parts generally have a **BOM** tab. By default, documents do not. When you save a part as a document, you cannot view the part's BOM in the resulting document unless your Agile administrator has configured your system to permit documents to have BOMs.

To create an item using Save As:

1 Select and open an existing item.

2 Open the **Actions** menu on the right side of the page, and choose **Save As**.

3 If appropriate, select a different item type from the **Sub Type** list.

4 Enter the new item's number.
Or click 123 to assign an AutoNumber.

5 Click **Save As**.

Agile creates the new item and displays it in the right pane.

6 Make any appropriate modifications to the tabs. See "Editing Items" on page 3-20 for instructions.

Note If you do not have Discovery privilege for any of the items on the BOM list of the existing item, you cannot use Save As to create a new item.

If the Agile administrator has set the appropriate preferences in Agile Administrator, then **Page Two** and **Page Three** sections' fields are copied to the new item. For information about the behavior of Page Two and Page Three fields in your Agile Advantage system, see your Agile administrator.

Save As copies data from a field in the existing object to the same field in the new object. If a field or list value in the existing object is not also present in the new object, then that field or list value is not copied to the new object.

Note Because **Page Three** data applies to a specific subclass only, if you use Save As to create an new object of a different subclass, the **Page Three** data is *not* copied to the new object.

Creating an Item Using Add

When you click **Add** on certain tabs of items and changes, such as the **Affected Items** or **BOM** tab, you can create a new item to add to the tab.

To create an item to add to the tab:

1 On the tab to which you want to add a new item, click **Add**.

A wizard opens, giving you options to search for existing items or create new items.

Figure 3-9: The Add Affected Items Wizard



2 Select **Create**, enter the type (subclass) of item to create, and click **Next**.

3 Specify an item number and description, and click **Next**.

The next step of the wizard gives you a chance to enter additional information about this item on the tab to which you're adding it.

4 Enter information as desired.

5 To add more items to the tab, click **More**, and follow the wizard steps. When you are finished adding items, click **Finish**.

6 To fill in the rest of the new item's tabs, open the item and fill in the information.

Saving a New Item

New items are automatically saved when you click the **Finish** button in the wizard. Items created using Save As are saved when you click the **Save As** button in the dialog box.

Working with Pending Revisions

This section contains the following topics:

- Overview of Pending Revisions
- Creating a Pending Revision
- Creating a Pending Revision
- Modifying Pending Revisions

Overview of Pending Revisions

You can create a pending (also called preliminary) revision of an item. Pending revisions let you attach files and incorporate them into the item. When the preliminary change affecting the item is released, the attached files automatically stay with the new revision of the affected item and are incorporated (unless your Agile administrator has opted to alter this behavior).

A pending revision can be identified by the parentheses around the revision number in the **Rev** field, for example, (A).

When a default revision number must appear—for example, on the **BOM** tab—the default is determined by a series of rules. For details, see "Details About Revision Display on BOMs" on page 15-8.

Creating a Pending Revision

You can create a pending (also called preliminary) revision of an item. A pending revision can be identified by the parentheses around the revision number in the **Rev** field, for example, (A).

To create a pending revision:

1. Create the item.
2. Create an ECO.
3. Place the item on the **Affected Items** tab of the ECO.
4. Give the affected item a revision number.

For information about creating ECOs, see Chapter 6, "Changes."

When a default revision number must appear—for example, on the **BOM** tab—the default is determined by a series of rules. For details, see "Details About Revision Display on BOMs" on page 15-8.

Attachments on Pending Revisions

By default, when a pending revision is created, it inherits whatever files are attached to the current default revision. If any files are then either added to or removed from the current default revision, those modifications are not reflected on the **Attachments** tab of the pending revision. For additional information about attachments and item revision levels, see "File Operations on MCO Revisions" on page 10-6.

Note The Agile administrator sets your system to either allow or disallow attachments to be copied to a new pending revision. If you have questions about your system settings, see your Agile administrator.

Modifying Pending Revisions

You can modify pending revisions the same way you modify other objects. Because modifying a pending revision could affect a released revision, you must have the appropriate privileges to modify the **Title Block**, **Page Two**, and **Page Three** fields. If you have the appropriate privileges to modify preliminary items, you can modify fields on pending revisions for items with no released revisions. If you have the appropriate privileges to modify released items, you can modify fields on pending revisions for items with at least one released revision. If you have questions about your privileges, see your Agile administrator.

Deleting Items

The Agile Advantage Web client allows you to "soft delete" an item. The item remains in the Agile database, but it can be "hard deleted" using the Agile Advantage Windows client to permanently remove it from the database. See the *Agile Advantage 2006 Windows Client User Guide*.

This section contains the following topics:

- Soft-Deleting an Item
- Undeleting an Item

Soft-Deleting an Item

To soft-delete an item:

1. Select and open the item you want to delete.
2. Click the **Changes** tab.
3. Review the change history and pending changes.

   If there are any released changes, you cannot delete the item. If there are any pending changes, you must first remove the item from the **Affected Items** tab of each pending change before you can delete the item.
4. (If appropriate) Return to the item.
5. Choose **Actions | Delete.**

The item is soft-deleted. It is no longer available for use. However, until it is hard-deleted (in the Agile Advantage Windows client), its number is reserved in the Agile database and cannot be reused.

Note In the Agile Advantage Web client, soft-deleted objects are maintained in the Recently Visited folder among the most recently visited objects.

Undeleting an Item

Since soft-deleted objects still exist in the database, you can undelete them if you have the necessary privileges.

To undelete an item:

1. From the Change Analyst Searches folder in the left pane of the Agile Advantage Web page, run the Deleted Items search to locate the soft-deleted item you want to undelete.

   Or you can select it in the Recently Visited folder, if it is among the last 20 objects you have viewed.
2. Select and open the deleted item you want to restore.
3. To undelete the item, choose **Actions | Undelete**.

Editing Items

You edit preliminary and released items in different ways. Preliminary items can be edited directly, but released items must be edited with a change order.

This section contains the following topics:

- Editing Item Data
- Editing a Released Item
- Changing an Item's Subclass

Editing Item Data

You can edit numbers and much of the other information about an item's **Title Block** tab if the item has *not* been released. For additional information about editing an item that has not been released, see "Working with Pending Revisions" on page 3-17 and "About Modifying the BOM Table" on page 8-7.

For example, to renumber an unreleased item:

1. Select and open the item.
2. Click **Edit**.

3 Select the number in the **Number** field, and type a new number.
Or click 123 to automatically select a new AutoNumber.

4 Other fields can be modified in a similar way. When your modifications are complete, click **Save** to keep them, or click **Cancel** to close the Edit page without saving the changes.

When you renumber a part that is a child of another item, all connections between the parent and child are lost. For example, if Part #2 is listed on the BOM of Part #A, Part #A is listed on Part #2's **Where Used** tab. If you renumber Part #2 to Part #22, the connection to parent Part #A is lost, and Part #A is no longer listed on the **Where Used** tab of Part #22. Agile warns you when you rename an item that is a child of another item.

Changing an Item's Subclass

If you have the appropriate privileges, you can change the subclass of an item. For example, you can change the subclass of a particular document from Specification to Data Sheet.

Caution! When you change the subclass of an item, its data fields change, and all custom information on the **Title Block** tab is cleared.

For information about how to change the subclass of an item, see "Changing an Item's Subclass" on page 15-5.

Releasing an Item to Production

Items are not released to production directly. Rather, a change (an ECO) is created against the item, and that change is released through the ECO process, described in "Change Control Process" on page 1-9. For more information about ECOs and other Agile Advantage changes, see Chapter 6, "Changes."

To release an item to production:

1 Follow the steps in "Creating Changes," on page 6-17, to create an ECO that releases the item.

2 Route the ECO as described in Chapter 6, "Changes."

3 When the change has progressed through the required statuses, it is ready for release. Usually, this includes at least one Review type status, when users sign off the change.

If AutoPromote is set, the change is released automatically when the change has been signed off.

If AutoPromote is not set, click the **Next Status** button to release the change.

Note If you have the appropriate privileges, you can use the **Signoff** tab to move the change directly to the Released type status in the workflow.

When the change is released, the item is also released.

For more information about changes, see Chapter 6, "Changes."

Editing a Released Item

If you have sufficient privileges, you can edit most fields on the **Title Block** tab even after an item has been released. However, you cannot edit the Item **Number** field. See "Editing Item Data" on page 3-20.

With sufficient privileges you can also add or modify attached files after an item has been released.

Unreleasing an Item

If you have sufficient privileges, you can unrelease a released item.

Caution! *Do not* unrelease items if you use Agile ChangeCAST to communicate product information to other enterprise applications.

To unrelease an item:

1. Select and open the item.
2. Click the **Changes** tab.
3. Click the number of the change that released the item.

   Note If there are subsequent changes to the item, you must first unrelease those changes in the reverse order from which they were made.
4. On the **Signoff** tab, click the Pending type status in the status chart.

Note Switching a change to any status in the workflow that occurs before the first Released type status unreleases the change and, therefore, unreleases the item. If there is no such status displayed in the change status list (Pending, Submit, or Review type), either you do not have the necessary privileges to select that status to unrelease the change, or the change's workflow does not allow unreleasing the change. For information about how to view the sequential list of statuses in a workflow, see "Viewing the Workflows Used at your Site" on page 6-24.

The Change Status to *status name* page appears.

5 Fill in the **Notify** field.

6 Enter any comments in the **Comments** field.

7 Click **OK**.

Incorporating and Unincorporating Items

If you have sufficient privileges, you can incorporate an item. When you incorporate an item, you lock its attachments so no unauthorized changes can be made. If you incorporate an item with no attachments, then none can be added to it.

This section includes the following topics:

- Pre-incorporating an Item
- Incorporating an Item
- Unincorporating an Item

Once an item is incorporated, its attachments cannot be checked out. Copies can be taken of attachments for the purpose of viewing and working with them, but the attachments cannot be amended without an ECO. Likewise, you cannot incorporate an item that has any files checked out.

Before you can add or edit attachments on an incorporated item, the item must first be unincorporated. Once the changes are made, the item can be incorporated again. Appropriate privileges are required to either incorporate or unincorporate items.

The Incorporated/Unincorporated status refers to *all* the files attached to the item for a specific revision. When you incorporate an item, just that revision with its attachments is incorporated. For example, if you have three unincorporated revisions of an item (Revs C, D, and E), when you incorporate Rev D, Revs C and E remain *un*incorporated.

A Preliminary item that has never been released cannot be incorporated because it has no revision level. Once an ECO is written against the Preliminary item, and a pending revision number is specified, that pending revision can be incorporated. See "Pre-incorporating an Item" below.

Pre-incorporating an Item

An item can be incorporated before it is released, in which case it is referred to as "pre-incorporated." Pre-incorporating an item provides a way to mark a revision as tentatively complete, and to "freeze" attachments from checkout. It is still possible to "Get" a copy of an attachment, but the files attached to an incorporated item cannot be modified.

Pre-incorporation is performed the same way as incorporation, except that it is performed on an unreleased item. See "Incorporating an Item" below.

Incorporating an Item

You cannot incorporate an item that has any files checked out.

To incorporate an item:

1. Select and open the item.
2. Choose **Actions | Incorporate.**

If an item is incorporated before it has been released, the incorporation process is performed the same way, but it is known as pre-incorporation. See the previous section, "Pre-incorporating an Item."

Unincorporating an Item

When you unincorporate an item, just that particular revision is unincorporated.

To unincorporate an item:

1. Open the item.
2. Choose **Actions | Unincorporate.**

Printing Item Tabs

Although attachments are printed from their native applications or the Agile View & Markup, you can print item tabs and other data from your Web browser. You can print the current tab or all tabs. For instructions, see “Printing Objects” on page 2-13.



CHAPTER 4
Manufacturing Objects

This chapter gives an overview of Agile's Manufacturer Management features available for companies with the appropriate license. It discusses these topics:

- *What Is Manufacturer Management?*
- *Setting Up Manufacturing Data*
- *Manufacturing Objects: Manufacturers and Manufacturer Parts*
- *Creating and Managing Manufacturers*
- *Creating and Managing Manufacturer Parts*
- *Associating a Manufacturer Part with Its Corresponding Item*
- *Important Considerations When Working with Manufacturing Objects*
- *Working with Manufacturing Data on Preliminary Items*
- *Modifying Manufacturing Data from the Redlines Page*
- *Maintaining Manufacturing Data on Post-preliminary Items*
- *Searching for Manufacturing Objects*

What Is Manufacturer Management?

This section covers the following topics:

- What Does The Manufacturer Management Module Do?
- About Manufacturing Objects
- Many-to-One Relationships Among Manufacturing Objects

The Manufacturer Management capabilities enable you to manage information related to manufacturers and the parts they produce. If you have been granted the necessary privileges, you can perform the processes described here.

Note Users at sites not licensed for Manufacturer Management capabilities may not see the features described here.

What Does The Manufacturer Management Module Do?

The Agile Web client provides a way to track the relationships between items and their manufacturers and to create an approved manufacturers list (AML). This means you can quickly find, for instance, which manufacturers are producing a particular part, their identification information for that part, where that part is used, and contact information for the manufacturer.

Additionally, you can use manufacturer change orders (MCOs) to change manufacturing data.

About Manufacturing Objects

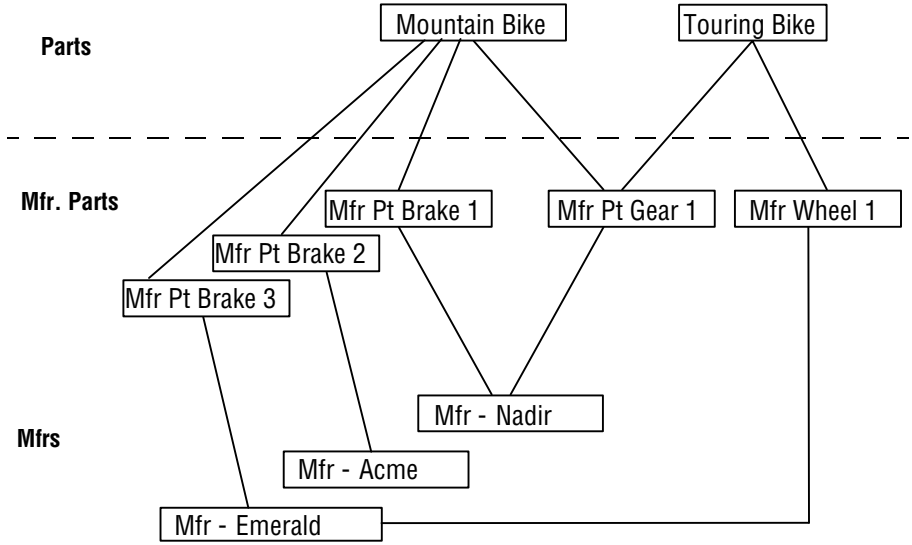
The Agile Web client works with *objects*, which include *items*, *changes*, and *manufacturing objects.* The license for Manufacturer Management features introduces manufacturing objects:

- The manufacturer — this object holds data about the manufacturer, including contact information and where his parts are used.
- The manufacturer part — this object describes product parts from the manufacturers' point of view, with information such as their part numbers and their names for that part, as well as information about where this part is used in your assemblies.

Many-to-One Relationships Among Manufacturing Objects

The Supplier Management capabilities allow you to track complex, many-to-one relationships. The following figure shows an example of a more complex situation such as those commonly found in real-life manufacturing.

Figure 4-1: An example of a more complex, many-to-one parts scenario



In this example, some manufacturer parts are used in more than one part, and some manufacturers provide more than one manufacturer part.

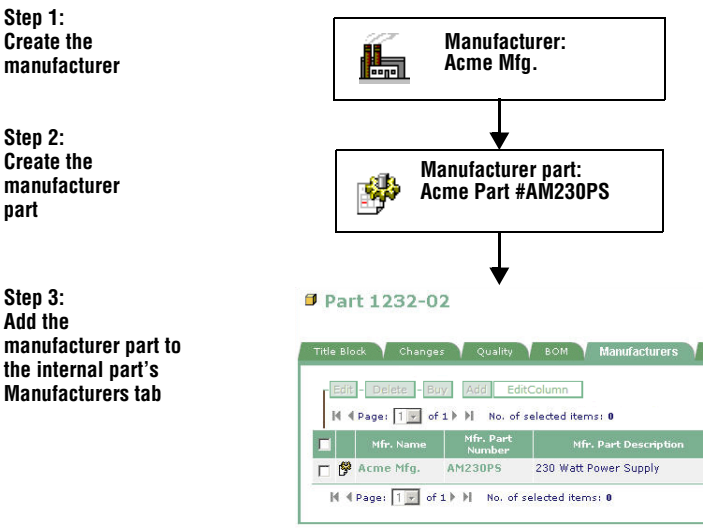
Setting Up Manufacturing Data

To track manufacturing data in Agile Advantage, you must first set up the manufacturers in your database and then create the manufacturer parts that they produce for use in your assemblies.

Order is important. You cannot create a manufacturer part until you have created the corresponding manufacturer.

This process is illustrated in the following figure.

Figure 4-2: Setting up manufacturing data in the Agile



Once the relationships have been established, it is easy to track manufacturing data activity.

From this point on, manufacturing data can be managed through the redlining process. This is discussed in "Redlining ECOs and MCOs" on page 6-58.

Note Manufacturers and manufacturer parts are not subject to the change control process and can be created, edited, and deleted by any user granted the necessary privileges. Those changes go into effect immediately.

To set up manufacturer data in the database:

1. Create the manufacturer. This represents the manufacturer of the purchased part. See "Creating and Managing Manufacturers" on page 4-10.
2. Create the manufacturer part. This represents the part that the manufacturer produces. See "Creating and Managing Manufacturer Parts" on page 4-13.
3. Match the manufacturer part to the corresponding item by adding it to the item's **Manufacturers** tab. See "Adding a Manufacturer Part to the Manufacturers Tab" on page 4-17.

This process is illustrated in Figure 4-2 on page 4-4.

Manufacturing Objects: Manufacturers and Manufacturer Parts

This section covers the following topics:

- Manufacturing Object Tabs
- About Manufacturers
- About Manufacturer Parts

Manufacturing Object Tabs

The manufacturer and the manufacturer part have several of the same tabs as items (**Where Used**, **Attachments**, and **History**), but they also have differences. For example, they have a **General Info** tab in place of the **Title Block** tab, and they do not have a **Changes** or **BOM** tab. Also, because their role is different from that of items, these two objects have data fields that are quite different from an item's data fields.

The table below lists the fields found on the tabs of these two manufacturing objects. (Compare with Table 3-1 on page 3-3.) The page reference given below the name of each tab indicates where that tab is discussed.

Table 4-1: Manufacturing object tabs

Manufacturers		Manufacturer parts	
Tab	**Fields include**	**Tab name**	**Fields include**
General Info (page 4-7)	**Name**, **Mfr. Type**, **Lifecycle Phase**, **Address**, **Phone**, **Contact**, **Email**, **URL**	**General Info** (page 4-9)	**Manufacturer Part Number**, **Description**, **Manufacturer Name**, **Mfr. Part Type**, **Lifecycle Phase**
Where Used (page 3-10)	**Item Number**, **Item Description**, **Mfr. Part Number**, **Manufacturer Part Lifecycle Phase**	**Where Used** (page 3-10)	**Item Number**, **Item Description**, **Manufacturer Tab Preferred Status**, **Mfr. Tab Reference Notes**
Attachments (page 3-11)	**File Description**, **File Name**, **File Version**, **File Size**, **File Type**, **Modified Date**, **Last View Date**, **Checkout User**, **Checkout Date**, **Checkout Folder**	**Attachments** (page 3-11)	**File Description**, **File Name**, **File Version**, **File Size**, **File Type**, **Modified Date**, **Last View Date**, **Checkout User**, **Checkout Date**, **Checkout Folder**

Table 4-1: Manufacturing object tabs

Manufacturers		Manufacturer parts	
Tab	**Fields include**	**Tab name**	**Fields include**
History (page 3-12)	**Action**, **User**, **Local Client Time**, **User Action Time** (optional), **Details**	**History** (page 3-12)	**Action**, **User**, **Local Client Time**, **User Action Time** (optional), **Details**

Where Used Tab and the Discovery Privilege

If you do not have Discovery privilege for an item, manufacturer, or manufacturer part, it does not appear on the **Where Used** tab. You may see a message at the bottom of the page telling you how many objects are not displayed. For more information, see "Details About the Discovery and Read Privileges" on page 15-2. If you have questions about your Discovery privileges, see your Agile administrator.

Read Privilege

Your Read and Enforce Field Level Read privileges determine which fields you are able to view. For more information, see "Details About the Discovery and Read Privileges" on page 15-2. If you have questions about your Read privileges, see your Agile administrator.

The following sections present information specific to each manufacturing object.

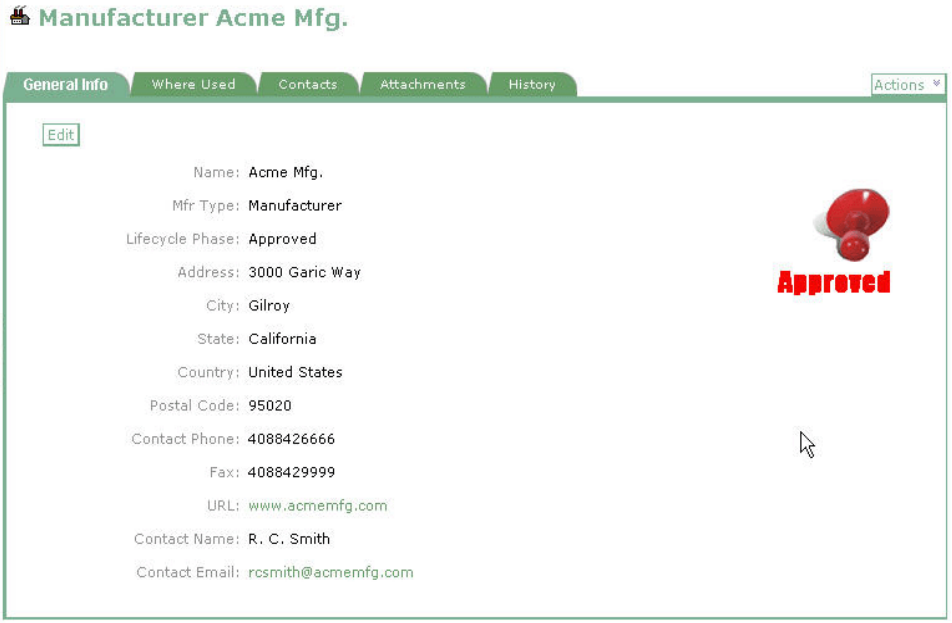
About Manufacturers

The manufacturer object stores data about the manufacturer, including contact information and parts from that manufacturer.

You create manufacturers in a way similar to the way you create other objects, and manufacturers also behave much like other objects. Creating a manufacturer is the first step in adding a new manufacturer part. Once you create the manufacturer, you can create the manufacturer part in association with that manufacturer so that the manufacturer part is referenced on the manufacturer's **Where Used** tab.

Use the same search process to find manufacturers as you use for any other object. For more information, see Chapter 12, "Searching for Objects."

Figure 4-3: A Manufacturer



Lifecycle Phase on the General Info Tab of a Manufacturer



The icon farthest to the left at the top of the page indicates that the object type is manufacturer.



The second icon is visible in the upper right corner of the page if the object has any attached files. You can click this icon to display the **Attachments** tab. For more information see Chapter 10, “Attachments.”

A lifecycle stamp in the top right corner of the **General Info** tab indicates the lifecycle phase of a manufacturer.

Table 4-2: Manufacturer Lifecycle Stamps

Lifecycle Stamp	Lifecycle Name	Lifecycle Definition
	Approved	This is an approved manufacturer.
	Disqualified	This manufacturer is no longer qualified for use.
	Obsolete	This manufacturer is no longer available for use.

The other tabs of the manufacturer are similar to those of items. See "Where Used Tab," "Attachments Tab," and "History Tab" starting on page 3-10.

About Manufacturer Parts

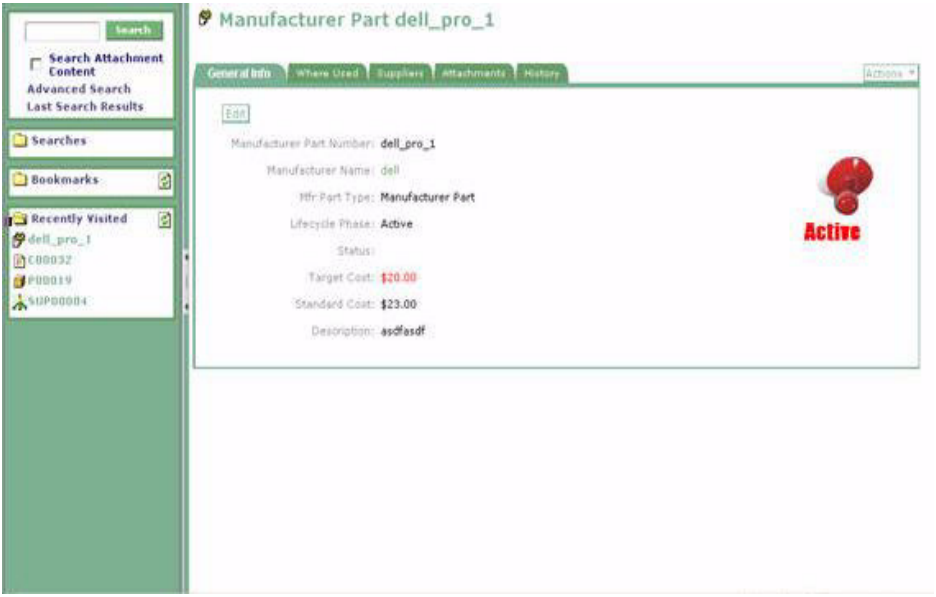
The manufacturer part object displays information about a part produced by a specific manufacturer, including the manufacturer's part number, lifecycle phase, where it is used, and a history of actions affecting that manufacturer part. Manufacturer parts can be found using the same search processes as any other object. For more information, see "Performing Searches on Manufacturing Objects" on page 12-35.

You create manufacturer parts as you do any new object, using the **Create** menu.

Once you create a manufacturer part, you can add it to the **Manufacturers** tab of the part to which it corresponds. For more information about manufacturer parts, see "Creating and Managing Manufacturer Parts" on page 4-13.

The combination of the manufacturer name and manufacturer part number must be unique to that manufacturer part. In other words, you cannot create another manufacturer part for the same manufacturer using the same manufacturer part number. However, Agile does support the situation in which different manufacturers are using an identical part number.

Figure 4-4: A Manufacturer Part



General Info Tab of the Manufacturer Part

The following table lists the fields found on the **General Info** tab of manufacturer parts.

Table 4-3: Manufacturer Part General Info Tab Fields

General Info tab field	Description
Manufacturer Part Number	The number the manufacturer uses to identify the part.
Manufacturer Name	The name of the manufacturer.
Mfr Part Type	The manufacturer part's subclass. Your Agile administrator may define multiple subclasses. See "Object Superclasses, Classes, and Subclasses" on page 1-7.

Table 4-3: Manufacturer Part General Info Tab Fields

General Info tab field	Description
Lifecycle Phase	See "Lifecycle Phase on the General Info Tab of a Manufacturer" below.
Description	A description of the part.

Lifecycle Phase on the General Info Tab of the Manufacturer Part

The Agile Advantage Web client uses a lifecycle stamp in the top right corner of the **General Info** tab to indicate the lifecycle phase of a manufacturer part.

Table 4-4: Manufacturer part lifecycle stamps

Lifecycle stamp	Lifecycle name	Lifecycle definition
	Active	This manufacturer part is available for use.
	Obsolete	This manufacturer part should no longer be used.

The other tabs of the manufacturer part are similar to those of items. See "Where Used Tab," "Attachments Tab," and "History Tab" starting on page 3-10.

Creating and Managing Manufacturers

This section covers the following topics:

- Creating Manufacturers
- Deleting Manufacturing Objects
- Modifying Manufacturers
- Working with a Manufacturer

Creating Manufacturers

A manufacturer is created in the same way as a new item, but doing so requires the Create Manufacturer privilege. To learn about creating new items, see "Creating Agile Items" on page 3-13.

You can also add a manufacturer part to the **Manufacturers** tab of an item, even if you have not yet created the manufacturer or manufacturer part. This process is similar to creating items on-the-fly. When you add a manufacturer to the **Manufacturers** tab, if you enter the name of a manufacturer that does not yet exist, The Agile Web client prompts you to create the new manufacturer.

Unlike items, manufacturers do not need to go through the release process. They are immediately available for use.

Note The manufacturer name must be unique to one manufacturer, just as an item number must be unique to an item.

Although different manufacturers can use the same manufacturer part number, the combination of manufacturer plus manufacturer part number must be unique to one manufacturer part.

To create and complete a manufacturer:

1. Choose **Create | Manufacturer**.
2. On the Create New Manufacturer page, select a subclass from the list (Manufacturer, by default).
3. Type the name of the manufacturer in the **Name** field, and click **Next**.

   The Agile Advantage Web client creates the manufacturer and displays the **Enter General Info Tab Data** page.
4. Complete any appropriate fields on this page, and click **Next**.

   Or, if you have no other information to add to the manufacturer, you can click **Finish** to save the manufacturer and display it in the right pane.
5. If you clicked **Next**, add all appropriate files on the Add Attachments page. For details, see "Adding Attachments" on page 10-6.
6. Finally, click **Finish** to complete the manufacturer.

Deleting Manufacturing Objects

The Agile Advantage Web client supports "soft" deletions, which remove the object from view but leave it in the Agile database. To hard-delete an object, which removes it from the Agile database, you must use Agile Advantage Windows client. See "Deleting Items" on page 3-19 for more information about:

- Soft-deleted objects
- Hard-deleted objects
- Which deleted objects can be undeleted
- Searching for soft-deleted objects

Note You cannot delete a manufacturer if it is listed on a part's **Manufacturers** tab, or if a manufacturer part exists for this manufacturer.

Soft-Deleting a Manufacturing Object

To soft-delete a manufacturer or manufacturer part:

1. Open the manufacturer or manufacturer part you want to delete.
2. Click the **Where Used** tab.

   If the manufacturer or manufacturer part is used on any item's **Manufacturers** tab, you cannot delete it.
3. If appropriate, return to the manufacturer or manufacturer part.
4. Choose **Actions | Delete.**

   The manufacturer or manufacturer part is soft-deleted. It is no longer available for use. However, until it is hard-deleted (in the Agile Advantage Windows client), its number is reserved and cannot be reused.

   Note In the Agile Advantage Web client, soft-deleted objects are maintained in the Recently Visited folder among the 20 most recently visited objects.

Undeleting a Manufacturing Object

Since soft-deleted objects still exist in the database, you can undelete them if you have the necessary privileges.

To undelete a manufacturer or manufacturer part:

1. Find the soft-deleted manufacturer or manufacturer part you want to undelete:

   From the Component Engineer Searches folder, run the Deleted Manufacturer search or the Deleted Manufacturer Parts search.

   You can also select it in the Recently Visited folder, if it is among the last 20 objects you have viewed.

2. Open the appropriate deleted manufacturer or manufacturer part.

3. Choose **Actions | Undelete**.

   The previously soft-deleted manufacturer or manufacturer part is undeleted and is once more available to users.

Caution! You cannot undelete a hard-deleted object.

Modifying Manufacturers

Any user with the necessary privileges can modify values entered for a manufacturer. Manufacturers are not required to go through the change control process; all modifications that are made go into effect immediately.

Caution! If you change a manufacturer part number or manufacturer name, these changes are automatically made to the **Manufacturers** tab of the items where the manufacturer or manufacturer part is listed and to any other tabs where the manufacturer is listed, such as the **Where Used** tab.

Working with a Manufacturer

Once you have created the manufacturer, you can then create manufacturer parts corresponding to that manufacturer and build a record of data about those manufacturer parts. This is explained in the following section, "Creating and Managing Manufacturer Parts."

Creating and Managing Manufacturer Parts

A manufacturer part is created in the same way as a new item, but doing so requires the Create Manufacturer Part privilege. To learn about creating new items, see "Creating Agile Items" on page 3-13.

This section covers the following topics:

- Creating Manufacturer Parts
- Modifying Manufacturer Parts

You delete manufacturer parts the same way you delete manufacturers. See "Deleting Manufacturing Objects" on page 4-12.

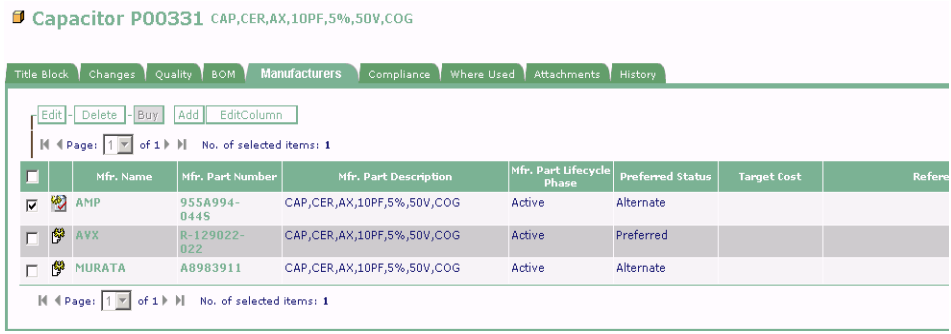
Creating Manufacturer Parts

You can add a manufacturer part to the **Manufacturers** tab of an item even if you have not previously created that manufacturer part. This process is similar to creating items on-the-fly. See "Adding a Manufacturer Part to the Manufacturers Tab" on page 4-17.

Unlike items, manufacturer parts do not need to go through the release process. They are immediately available for use.

Note Different manufacturers can use the same manufacturer part number; however, the combination of manufacturer plus manufacturer part number must be unique to one manufacturer part.

Figure 4-5: The Manufacturers Tab of a Part



To create a manufacturer part from the Create menu:

1. Choose **Create | Manufacturer Part.**
2. On the Create New Manufacturer Part page, select a subclass from the list (Manufacturer Part, by default).
3. Select the name of the associated manufacturer in the **Manufacturer** field.
4. Type the part number assigned by that manufacturer in the **Number** field.

5 Click **Next**.
The Agile Advantage Web client creates the manufacturer part and displays the **Enter General Info Tab Data** page.

6 Complete or change any appropriate fields on this page, and click **Next** to add attachments. For details see "General Info Tab of the Manufacturer Part" on page 4-9.
Or, if you have no other information to add to the manufacturer part, you can click **Finish** to save the manufacturer part and display it in the right pane.

7 If you clicked **Next**, add all appropriate files on the Add Attachments page. For details see "Adding Attachments" on page 10-6.

8 Finally, click **Finish** to complete the manufacturer part.

For more information about creating, modifying, and working with manufacturer parts, see the following sections, "Important Considerations When Working with Manufacturing Objects" and "Maintaining Manufacturing Data on Post-preliminary Items."

Modifying Manufacturer Parts

Any user with the necessary privileges can modify values entered for a manufacturer. Because manufacturer parts are not required to go through the change control process, all modifications that are made go into effect immediately.

Caution! If you change a manufacturer part number or manufacturer name, these changes automatically are made to the **Manufacturers** tab of the items where the manufacturer or manufacturer part is listed and to any other tabs where the manufacturer is listed, such as the **Where Used** tab.

Associating a Manufacturer Part with Its Corresponding Item

Once you have created a manufacturer and a manufacturer part, you can go to the **Manufacturers** tab of the part to which that manufacturer part corresponds and add the manufacturer part. This establishes the link between "your" part and "their" part, which makes it possible to track their part's use throughout the system.

You can list more than one manufacturer part from the same manufacturer, or from more than one manufacturer. For example, if a manufacturer makes two parts that you sometimes use for that assembly, you can mark one as Preferred and the other as Alternate. You can do the same thing if two different manufacturers supply a part.

Depending on the state of an item (and your user licenses and privileges), you can modify **Manufacturers** tab data by one of these methods:

- Add or modify directly on the **Manufacturers** tab of items.
- Use an ECO or MCO to modify manufacturing data on the **Manufacturers** tab of the Redlines page.

If an item has never been released and is in the Preliminary stage with no changes pending against it, and you have the necessary privileges, you can add, delete, or modify **Manufacturers** tab data. The following sections discuss modifying data directly on the **Manufacturers** tab before an item is released.

If the item does not meet these criteria, you must create a change against the item and use the manufacturer redline process to modify its **Manufacturers** tab data. See "Modifying Manufacturing Data from the Redlines Page" on page 4-18.

Important Considerations When Working with Manufacturing Objects

Once a manufacturer or manufacturer part has been used on an item's **Manufacturers** tab, any alterations you make to the manufacturing object are also made on that item's **Manufacturers** tab. Because manufacturers and manufacturer parts are not required to go through the change control process, all modifications that are made go into effect immediately. Because these alterations are not made by means of a change, they won't be passed to the ERP system by ChangeCAST. To avoid potential problems between the two systems, it is important to bear this in mind when making changes to any manufacturing object that is in use on an item's **Manufacturers** tab.

Working with Manufacturing Data on Preliminary Items

The following sections describe how to modify data directly on the **Manufacturers** tab before an item has been released:

- Adding a Manufacturer Part to the Manufacturers Tab

- Deleting a Manufacturer Part from the Manufacturers Tab
- Modifying a Manufacturer Part on the Manufacturers Tab

Adding a Manufacturer Part to the Manufacturers Tab

You can add manufacturer parts to the **Manufacturers** tab of an item by using the **Add** button on the **Manufacturers** tab.

To add a manufacturer part to the Manufacturers tab:

1. Click the **Add** button on the **Manufacturers** tab.

   The Identify Manufacturer Parts page appears, the first page of the Add Manufacturers wizard.

2. Select the manufacturer part to add. You can search for an existing manufacturer part or select **Create** to create a new manufacturer part.
3. If you are adding an existing manufacturer part, enter any text from the General Info page in the **Search** field and click **Next**, or click one of the other search choices and follow the onscreen instructions until the Information page appears. Then skip to step 5, below.
4. If you are creating a new manufacturer part, after you enter the part number, manufacturer, and description, click **Next**. The Information page appears.
5. Edit or add any additional information to the Information page, and click **Finish**.

   Note In the Agile Advantage Web client, you must complete the current manufacturing data line before going on to the next or exiting the item. If you don't, you see an error message and cannot exit the process. If you cannot complete the line, you can delete it.

Deleting a Manufacturer Part from the Manufacturers Tab

To delete a manufacturer part from the Manufacturers tab of an item still in the Preliminary state:

1. On the **Manufacturers** tab, select the item to be deleted.
2. Click **Delete**.

Modifying a Manufacturer Part on the Manufacturers Tab

Note Because manufacturer parts are not required to go through the change control process, all modifications that are made go into effect immediately.

You can edit the values for a manufacturer part that is listed on the **Manufacturers** tab of an item still in the preliminary state that has never been released and that has no changes pending against it.

To edit values for a manufacturer part:

1. Open the item to be edited.
2. On the **Manufacturers** tab, click **Edit**, and change the data as necessary.

Modifying Manufacturing Data from the Redlines Page

This section contains the following topics:

- Overview of Redlining Manufacturing Data
- Manufacturer Redlines Page Buttons
- About Redlining Manufacturing Data

See also "Maintaining Manufacturing Data on Post-preliminary Items" on page 4-23.

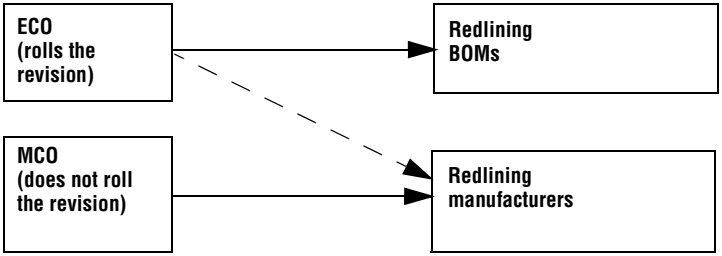
Overview of Redlining Manufacturing Data

You can add a released item with pending changes to the **Affected Items** tab. An example is shown in Figure 4-8 (You can also redline its manufacturers later by selecting the item from the **Affected Items** tab and clicking the **Manufacturer Redline** tab on its Redlines page.)

On some systems, depending on how your Agile administrator has configured settings, redline changes are available from both ECOs and MCOs. MCOs can redline only manufacturer parts data, and ECOs can redline BOMs or manufacturer parts data. MCO redlines do not advance, or roll, the revisions of the affected items, however, and ECO redlines do.

Since MCOs don't roll revisions, they can be used to redline manufacturing data without rolling the revision, and ECOs can be used to redline manufacturing data when rolling the revision is desired. Depending on your company policy, use an ECO or an MCO to determine if the revision of an item advances when you redline manufacturing data.

Figure 4-6: Redlining From an ECO Versus an MCO

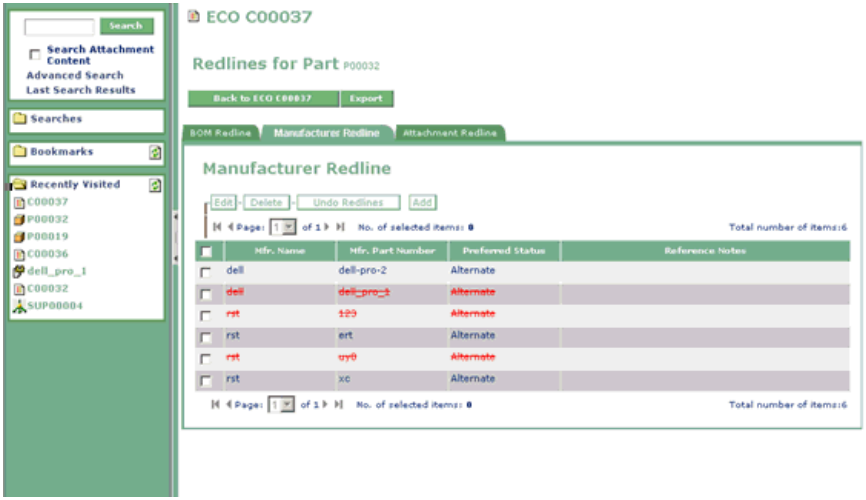


Redlining manufacturing data from an ECO is the same as the process from an MCO. However, because of the ECOs' ability to redline manufacturing data, BOMs, or attachments, the ECO Redlines page has a **BOM Redline** tab, a **Manufacturers Redline** tab, and an **Attachment Redline** tab. See the following figure.

Note For information about redlining BOMs, see "Redlining the BOM of a Released Item" on page 8-14.

For information about redlining attachments, see "Redlining Attachments in the Agile Viewer" on page 10-15.

Figure 4-7: A Manufacturer Redlines Page (From an ECO)



When you view the Redlines page from an **Affected Items** tab of an MCO, the **BOM Redline** tab and **Attachment Redline** tab are not displayed.

For more information about changes, see Chapter 6, “Changes.”

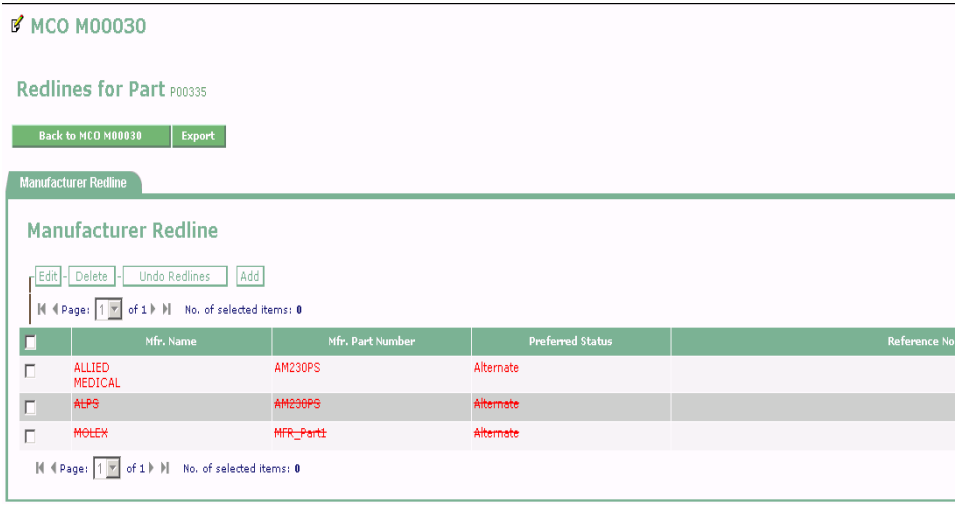
Note You must have the appropriate security privileges before you can redline manufacturing data.

For information about redlining manufacturing objects, see “Modifying Manufacturing Data from the Redlines Page” on page 4-18.

The following figure shows the Redlines page from an MCO. Figure 4-7 shows the Redlines page from an ECO, for comparison.

Note The Redlines pages of an ECO and an MCO may look different, depending on your system settings.

Figure 4-8: A Manufacturer Redlines Page (from an MCO)



If a row in the table has a red line through every cell, it means that manufacturer part was deleted from the Manufacturers table. If just a few of the cells have a short red line through them, it means the manufacturer part was modified. Any cell that was modified has a red line through the old value; the new value appears in red.

Manufacturer Redlines Page Buttons

The following buttons can be found on the Manufacturer Redlines page:

- The **Edit** button displays the selected row on an Edit page so you can modify it.
- The **Delete** button removes the selected row or rows from the Manufacturer Redline table.
- The **Undo Redlines** button clears redlines from the selected row or rows.
- The **Add** button opens the Add wizard so you can find an existing manufacturer part or create a new one.

About Redlining Manufacturing Data

If you have the appropriate privileges, you can modify a table on the Manufacturer Redlines page by:

- Editing a manufacturer part on the table
- Adding a manufacturer part to the table
- Deleting a manufacturer part from the table
- Editing other data on the table; if your Agile administrator has enabled them, there may be other fields on this table that can be redlined.

For instructions, see "Redlining Manufacturing Data" on page 4-24.

Adding Nonexistent Manufacturer Parts on the Redlines Page

When you click the **Add** button to add a manufacturer part to the Redlines page, you can choose the **Create** button to create a new Manufacturer Part. Continue following the wizard steps to create a new manufacturer part and redline the Manufacturers table.

Deleting Manufacturer Parts from the Redlines Table

Click the **Delete** button on the **Manufacturer Redline** tab to remove rows and objects from the page. The **Delete** button has these behaviors:

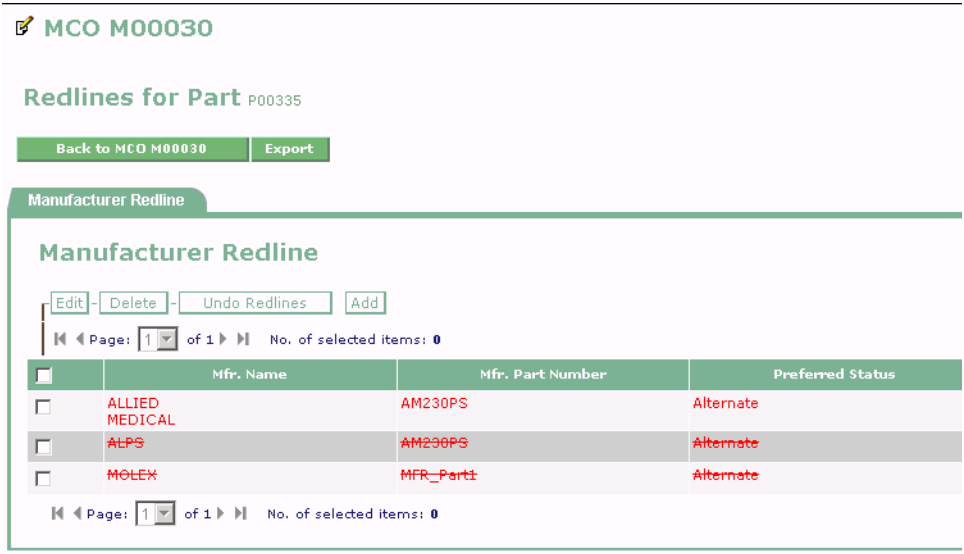
- If the selected row is red, it removes it.
- If the selected row is black, it puts a red line through it.

Editing Manufacturer Parts on the Redlines Page

You can modify any field related to any of the manufacturer parts on the **Manufacturer Redline** tab. For instructions, see "Editing a Manufacturer Part on the Manufacturer Redline Tab" on page 4-25.

The following figure shows a redlined manufacturer that has one manufacturer part being modified.

Figure 4-9: Redlines Page from an MCO



Undoing Changes to the Manufacturer Redline Table

Click the **Undo Redlines** button to undo modifications to the Redlines page. You can remove the red elements from the selected field or an entire redlined row.

Maintaining Manufacturing Data on Post-preliminary Items

This section covers the following topics:

- Modifying Manufacturing Data from the Redlines Page
- About Redlining Manufacturing Data

To make changes to the **Manufacturers** tab data on any item that has been released or has a pending change against it (and so is no longer in the Preliminary state), you must modify it by redlining from an ECO or MCO.

The redline process is described in the following sections.

Modifying Manufacturing Data from the Redlines Page

When you add a released item with pending changes to the **Affected Items** tab, the Agile Advantage Web client displays a Do Redlining icon in front of the item to remind you that you can redline its manufacturer or manufacturer part information. To do so, you need to open the Redlines page.

For more information, see "Modifying Manufacturing Data from the Redlines Page" on page 4-18.

Opening the Redlines Page

To view an affected item's Redline page in the Agile Advantage Web client:

1. Open a change that displays the item on its **Affected Items** tab.
2. On the **Affected Items** tab, click the **Do Redlining** icon in front of the item on the **Affected Items** tab.

   The Redlines page for that part appears.

   Note If you are redlining from an ECO, click the **Manufacturer Redline** tab to display it.

If a row in the table has a red line through every cell, it means that manufacturer part was deleted from the Manufacturers table. If just a few of the cells have a short red line through them, it means the manufacturer part was modified. Any cell that was modified has a red line through the old value; the new value appears in red.

Redlining Manufacturing Data

If you have the appropriate privileges, you can modify the Manufacturer Redline table on the Manufacturer Redlines page by:

- Editing a manufacturer part on the table
- Adding a manufacturer part to the bottom of the table
- Deleting a manufacturer part from the table
- Editing other data on the Manufacturer Redline table; if your Agile administrator has enabled them, there may be other fields on this table that can be redlined.

Adding a Manufacturer Part on the Manufacturer Redline Tab

To add a manufacturer part to the Manufacturer Redline tab:

1. Display the **Manufacturer Redline** tab as described in "Opening the Redlines Page" on page 4-24.
2. Click the **Add** button on the **Manufacturer Redline** tab.

   The **Identify Manufacturer Parts** page appears.
3. Continue as described in "Adding a Manufacturer Part to the Manufacturers Tab" on page 4-17.

Deleting a Manufacturer Part from the Manufacturer Redline Tab

You use the **Delete** button on the **Manufacturer Redline** tab to remove rows and objects from the tab. The **Delete** button has these behaviors:

- If the selected row is red, it removes it.
- If the selected row is black, it puts a red line through it.

To delete a manufacturer part:

1. Select either the entire row or a field in the row.
2. Click the **Delete** button on the **Manufacturer Redline** tab.

Editing a Manufacturer Part on the Manufacturer Redline Tab

You can modify any field related to any of the manufacturer parts on the **Manufacturer Redline** tab.

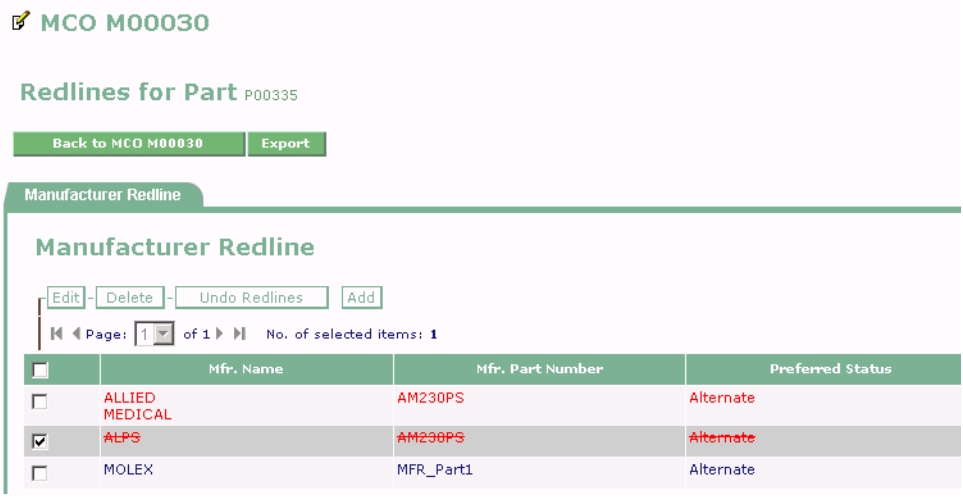
To edit a field on the Redlines page:

1. Check the row, and click **Edit**. The row becomes editable.
2. Make the required changes in the fields.

The Agile Advantage Web Client draws a red line through the old information and enters the new information, in red, below the old information.

The following figure shows a redlined manufacturer that has one manufacturer part being modified.

Figure 4-10: Manufacturer Redlines Page (from an MCO)



Undoing Changes to the Manufacturer Redline Tab

The **Undo Redlines** button lets you undo modifications to the Redlines page. The **Undo Redlines** button removes the red elements from the selected rows.

To undo a delete (where the Agile Advantage Web client draws a redline through the entire row):

1. Select a deleted row.
2. Click **Undo Redlines.**

To undo a modification (where the Agile Advantage Web client draws a short red line through the modified value):

1. Select the modified row.
2. Click **Undo Redlines.**

Searching for Manufacturing Objects

You can search for manufacturers and manufacturer parts in the same way as you search for other objects.

For more information, see “Performing Searches on Manufacturing Objects” on page 12-35.



CHAPTER 5
Sourcing Objects

This chapter gives an overview of Agile's Supplier Management features available to you. This chapter discusses these topics:

- *What Is Supplier Management?*
- *Suppliers and Supplier Parts*
- *Creating and Managing Suppliers*
- *Working with Supplier Data*
- *Working with Prices*
- *Where To Go From Here*

What Is Supplier Management?

The Supplier Management capabilities enable you to manage information related to suppliers and the parts they provide. If you have been granted the necessary privileges, you can perform the processes described here.

What Does the Supplier Management Module Do?

Agile's Supplier Management module provides a method to track the relationships between manufacturer parts and their suppliers and to create an Approved Vendor List (AVL). For instance, this means that you can quickly find which suppliers are providing a particular manufacturer part, their identification information for that part, where that part is used, its pricing data, and contact information for the supplier. This following explains Sourcing Objects in detail, and how to use them.

About Sourcing Objects

Agile Advantage works with objects, which include items, changes, manufacturing and sourcing objects. The Supplier Management capabilities introduce two sourcing concepts:

- *The Supplier* — holds data about the supplier, including contact information and where their parts are used.
- *The Supplier Part* — which is a set of attributes that describes the relationship between a supplier and the manufacturer part that the supplier provides.

Note For further information about Agile objects, see "Introducing Agile Objects"on page 1-5.

Working with Sourcing Objects

To use the Supplier Management features to track sourcing data, you must first set up the manufacturers in your database, and the manufacturer parts that they produce for use in your assemblies. Then, you must create suppliers and associate manufacturer parts with these suppliers using supplier parts.

It is important to enter the data for suppliers and supplier parts in a specific order. For example, you cannot create a manufacturer part until you have created the corresponding manufacturer. Also, you cannot create a supplier part until you have created the corresponding supplier.

To set up Supplier data in the database:

1. Create the supplier: this represents the supplier of the purchased part. See "Creating and Managing Suppliers" on page 5-8.
2. Create the supplier part: this represents the part that the supplier provides. See "Working with Supplier Data" on page 5-10.
3. Match the supplier to the corresponding part by adding it to the manufacturer part's **Suppliers** tab.

Once the relationships have been established, it is easy to track sourcing data activity.

Note Suppliers and supplier parts are not subject to the change control process, and can be created, edited, and deleted by any user granted the necessary privileges. Those changes will go into effect immediately.

Suppliers and Supplier Parts

This section covers the following topics:

- Supplier Object Tabs
- Table 5-1 lists the fields found on the tabs of the Supplier object. The page references given beside the name of each tab indicate where that tab is discussed.
- About the Supplier Object
- Supplier Parts on Manufacturer Parts Tab
- Contacts Tab of the Supplier Object

Supplier Object Tabs

The Supplier object has five tabs (including **General Info**, **Contacts**, **Manufacturer Parts**, **Attachments**, and **History**). Note that the Supplier object does not have a **Changes** tab.

Table 5-1 lists the fields found on the tabs of the Supplier object. The page references given beside the name of each tab indicate where that tab is discussed.

Table 5-1: Supplier Object Tabs

SUPPLIER	
Tab	**Fields include**
General Info (page 5-4)	Supplier Name, Supplier Type, Number, Lifecycle Phase, Status, D-U-N-S Number, Description, Web Supplier, Address, City, Country, State, Postal Code, Phone, Fax, URL, Max Contacts, Max Power Users
Contacts (page 5-7)	Name, Status, Email, Phone, Fax, Pager, Comment, Address. **Note** Contacts are defined in Agile Administrator.
Manufacturer Parts (page 5-8)	Supplier Part Number, Manufacturer Part Number, Manufacturer Name, Manufacturer Part Description, Status, Lead Time (days), Minimum Quantity, Maximum Quantity, Unit of Measure, Material Cost, Non-Material Cost, Total Cost, Notes
Attachments	File Description, File Name, File Version, File Size, File Type, Modified Date, Last View Date, Checkout User, Checkout Date, Checkout Folder
History	Action, User, Local Client Time, Details, Comments

About the Supplier Object

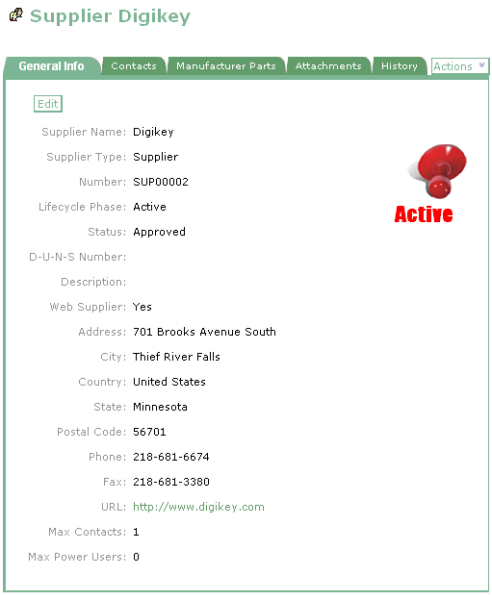
The supplier object stores data about the supplier, including contact information and the manufacturer parts that can be procured from that supplier.

Suppliers can be created similarly to - and behave much as - other objects. Creating a supplier is the first step in adding a new supplier part, if that supplier has not previously been a part supplier in your database.

Once the supplier is created, a manufacturer part can be associated with that supplier, and will be referenced on the supplier's **Manufacturer Parts** tab.

Suppliers can be found using the same Quick Search and search processes as any other object. For more information, see "Searching for Objects" on page 1-13.

Figure 5-1: A Supplier



General Info Tab

The Agile Advantage supplier window can have up to two icons in the upper corners.



The icon to the left indicates that the object type is a supplier.



The second icon is visible, to the right, if the object has any attached files. You can click this icon to bring the **Attachments** tab to the front to view it (for more information, see Chapter 10, "Attachments").

In Agile Advantage, from the **Actions** menu of the supplier window, on the right side of the page, choose:

- **Print** to print the current object
- **Export** to export the current object
- **Send** to send the current object to other users
- **Save As** to copy the current object by saving it under a different name
- **Delete** to delete the current object
- **Bookmark** to bookmark the object for quick display later
- **Refresh** to see an up-to-date results window

Fields on the Supplier General Info Tab

Table 5-2 lists and describes the fields on the Supplier **General Info** tab.

Table 5-2: Supplier General Info Tab Fields

Field	Completed...	Contains...
Supplier Name	Manually (Required)	Supplier's name.
Supplier Type	Subclasses created in Agile Administrator	Drop-down list of supplier object subclasses.
Number	When created, type number or use **AutoNumber** button (Required)	The number assigned to the supplier when you create it. May be an autonumber.
Lifecycle Phase	Active or Inactive	Drop-down list with **Active** or **Inactive**.

Field	Completed...	Contains...
Status	Alternate, Approved, Certified, Preferred, Suspended	Drop-down list with supplier status options from Agile Administrator. The default options in Agile Administrator are compatible with the APICS dictionary for supplier types.
D-U-N-S Number	Manually (Optional)	The Dunn & Bradstreet D-U-N-S (Data Universal Numbering System) number is the standard for keeping track of the world's businesses. Its unique nine-digit code helps identify and link more than 60 million companies worldwide.
Description	Manually	Long description about the supplier.
Web Supplier	Yes or No	Drop-down list with **Yes** or **No**.
Address	Manually	The mailing address of the supplier. (Optional)
City		
Country		
State		
Postal Code		
Phone	Manually	Supplier's main phone number.
Fax	Manually	Supplier's main fax number.
URL	Manually	Supplier's Web site URL.
Max Contacts	Manually	Maximum number of contacts allowed for this supplier.
Max Power Users	Manually	Maximum number of power users allowed for this supplier.

Supplier Lifecycle Phase on the General Info Tab

Agile Advantage enables companies to define their own supplier lifecycle phases on the **General Info** tab to indicate the Lifecycle Phase of a supplier.

Table 5-3 provides the Lifecycle names with their respective definitions:

Table 5-3: Supplier Lifecycle Definitions

Lifecycle Name	Lifecycle Definition
Active	This supplier is an active supplier of manufacturer parts.

Table 5-3: Supplier Lifecycle Definitions

Inactive	This supplier is no longer qualified for supplying manufacturer parts.

Supplier Status on the General Info Tab

Agile Advantage enables companies to define their own supplier statuses on the **General Info** tab to indicate the status of a supplier. Some of the definitions used by APICS (American Production and Inventory Control Society) have been pre-set in the Agile Advantage system.

Table 5-4 provides the status names and their respective definitions:

Table 5-4: Supplier Status Definitions

Status Name	Status Definition
Approved	This supplier has been approved as a supplier of manufacturer parts.
Certified	This supplier consistently meets predetermined quality, cost, delivery, financial, and count objectives. Incoming inspection may not be required.
Preferred	This is a preferred supplier of choice.
Suspended	This supplier has been suspended because of some business or quality issue, and should not be providing manufacturer parts.
Alternate	This supplier may or may not supply the items purchased, but is usually approved to supply those manufacturer parts.

Contacts Tab of the Supplier Object

The **Contacts** tab of the supplier object has contacts as defined by the Agile administrator, or added by users who have been granted the privilege to do so.

Table 5-5 describes the contacts' dialog fields:

Table 5-5: Contacts Fields

Contacts Dialog Field	Description
Name	Full Name (Company) under which the contact is displayed
Status	Contact's status
Email	Contact's email address
Phone	Contact's business phone number
Fax	Contact's fax number
Pager	Contact's pager number

Table 5-5: Contacts Fields

Contacts Dialog Field	Description
Comment	Comments about the contact
Address	Contact's mailing address (Optional)

Supplier Parts on Manufacturer Parts Tab

Table 5-6 lists the fields found when a Supplier is edited or added to the **Manufacturer Parts** tab of the Supplier object.

Table 5-6: Supplier Part Dialog Fields

Supplier Parts Field	Description
Supplier Part Number	The number the supplier uses to identify the part. In some cases, this might be the same number as the Manufacturer Part Number, but it is often different.
Manufacturer Part Number	The number the manufacturer uses to identify the part.
Manufacturer Name	The name of the manufacturer.
Manufacturer Part Description	The description of the manufacturer part.
Status	Drop-down list with **On Hold** and **Preferred**.
Lead Time (days)	Duration of time (in days) elapsed between the order and receipt of the manufacturer part from the supplier.
Minimum Quantity	Minimum quantity required for processing an order of this part.
Maximum Quantity	Maximum quantity allowed for processing an order of this part.
Unit of Measure	Unit of measure when this part is ordered from the supplier.
Material Cost	Material cost of the manufacturer part from this supplier.
Non-Material Cost	Non-Material (i.e. labor or other) cost of the manufacturer part from this supplier.
Total Cost	Sum of the Material and Non-Material cost fields. It could be overridden by the user, in which case, it will be displayed in red.
Notes	Notes about the supplier part.

Creating and Managing Suppliers

This section provides information about how to create, delete or modify a supplier.

Creating a Supplier

A supplier is created in the same way as a new customer, but doing so requires the appropriate privilege. You cannot add a supplier to the **Suppliers** tab of a Manufacturer Part as it is a Read Only tab.

Like manufacturers, suppliers do not need to go through the release process: they are immediately available for use.

Note The Supplier number must be unique to one supplier, just as a Customer number must be unique to one customer. Also, different manufacturer part numbers can have different supplier part numbers and different suppliers may have the same supplier part number.

Deleting a Supplier

The Agile Advantage Web client supports "soft" deletions. See "Deleting Items" on page 3-19 for more information about:

- Soft-deleted objects
- Which deleted objects can be undeleted
- Searching for soft-deleted objects

Soft-Deleting a Supplier Object

To soft-delete a supplier:

1. Open the supplier you want to delete.
2. Choose **Actions | Delete.**

The supplier is soft-deleted. It is no longer available for use. However, until it is hard-deleted (in the Agile Advantage Windows client), its number is reserved in the Agile database and cannot be reused.

Note In the Agile Advantage Web client, soft-deleted objects are maintained in the **Recently Visited** folder among the most recently visited objects.

Modifying a Supplier

Any user with the necessary privileges can modify values entered on a supplier object. As suppliers are not required to go through the change control process, all modifications that are made go into effect immediately.

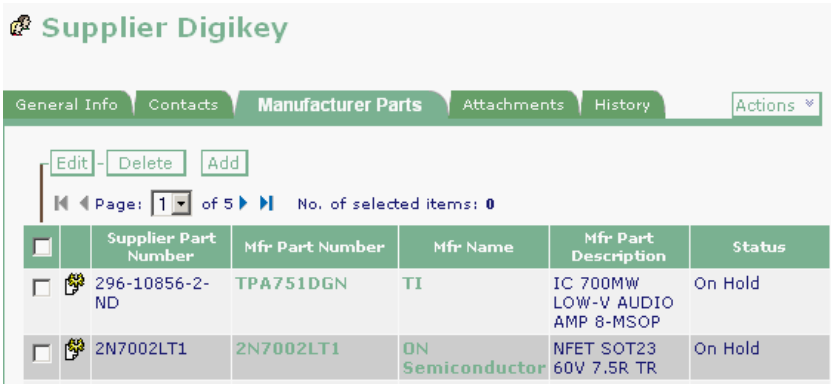
Caution! If you change a supplier, these changes are automatically made to the **Suppliers** tab of the manufacturer part.

Working with Supplier Data

The following sections describe how to work with supplier data:

- Adding a Supplier Part to the Manufacturer Parts Tab
- Managing Supplier Data on the Suppliers Tab of the Manufacturer Part
- Modifying Supplier Part(s) on the Manufacturer Parts Tab
- Deleting Supplier Part(s) on the Manufacturer Parts Tab

Figure 5-2: The Manufacturer Parts Tab of a Supplier



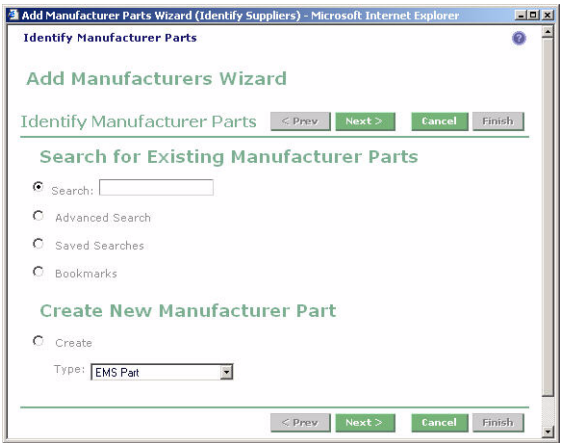
Adding a Supplier Part to the Manufacturer Parts Tab

You can add supplier parts to the **Manufacturer Parts** tab of a supplier by using the **Add** button on the **Manufacturer Parts** tab.

To Add a supplier part to the Manufacturer Parts tab:

1. Click the **Add** button on the **Manufacturer Parts** tab.
   The **Add Manufacturers Wizard** appears, as shown in Figure 5-3.
2. You can either:
   a. Search for a supplier through the **Search for Existing Manufacturer Parts**, or
   b. Create a new supplier through the **Create New Manufacturer Part**.

Figure 5-3: The Add Manufacturers Wizard



Managing Supplier Data on the Suppliers Tab of the Manufacturer Part

It is not possible to add, modify, or delete a supplier on the **Suppliers** tab of a Manufacturer Part. Instead, you must delete the Supplier Part from the **Manufacturer Parts** tab of the Supplier object, by selecting the desired part and clicking the **Delete** button.

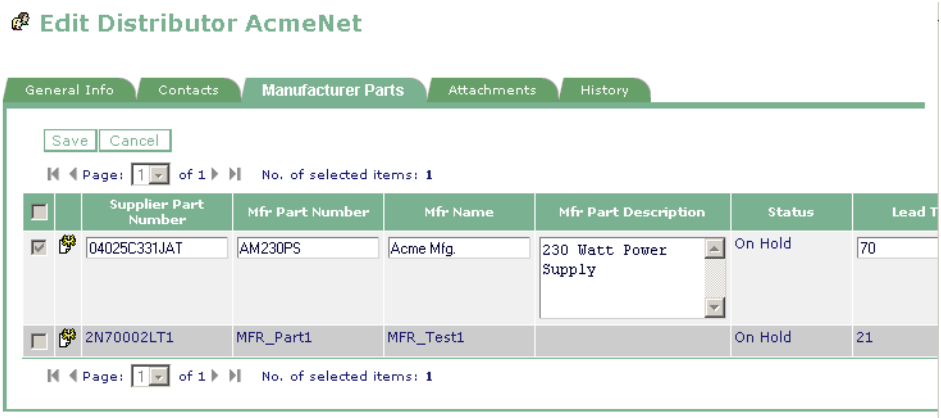
Modifying Supplier Part(s) on the Manufacturer Parts Tab

To edit the values of supplier part(s) that are listed on the Manufacturer Parts tab of a Supplier:

1. Open the supplier to be edited.
2. Click the **Manufacturer Parts** tab to bring it forward.
3. Select the object(s) to be edited.
4. Click **Edit**.
5. Edit the data as necessary (as shown in Figure 5-4 below).
6. Click the **Save** Save button.

Note As suppliers and supplier parts are not required to go through the change control process, all modifications that are made go into effect immediately.

Figure 5-4: The Edit Supplier Parts Dialog Box



Deleting Supplier Part(s) on the Manufacturer Parts Tab

Note Supplier parts deleted from the **Manufacturer Parts** tab will not remove the supplier object associated with those parts.

To delete the values for supplier part(s) that are listed on the Manufacturer Parts tab of a Supplier:

1. Open the supplier to be edited.
2. Click the **Manufacturer Parts** tab to bring it forward.
3. Select the part(s) to be deleted.
4. Click **Delete**.
5. A confirmation dialog box appears.
6. Click **OK**.

Working with Prices

The following sections describe how to work with pricing information:

- Working with Target Cost
- Calculate Target Cost
- Override Target Cost
- Cost Rollups
- Incomplete Cost Identification

- Working with Standard Cost

Working with Target Cost

Target Cost is the result of a calculation and a rollup of the material and non-material costs of all parts, components, and sub-assemblies. It can also be overridden and manually entered by the user, in which case it will be displayed in a red color.

Costed BOM Rollups are based on the value of the Target Cost. If a Target Cost value exists at the Item Part Number (IPN) level, that value is used in the Costed BOM Rollup.

If there is no Target Cost value at the Item Part Number level, then the Target Cost value at the Manufacturer Part Number (MPN) level is used in the Costed BOM Rollup. To populate the Target Cost value of the Item Part Number based on the Target Cost value at the MPN level, select the corresponding MPN and click on **Buy** Buy button.

Calculate Target Cost

Agile Advantage enables you to automatically calculate the Target Cost at the Manufacturer Part level, at the Component level, at the Sub-assembly level and at the Assembly level. To the immediate right of the **Target Cost** field, there is a **Cost** Cost button. The amount displayed in the **Target Cost** field when clicking this button varies depending on the type of part.

For Manufacturer Parts, when you click the **Cost** Cost button, the material and non-material costs for the Preferred Supplier Part are summed and the total cost is shown in the **Target Cost** field. If there is no Preferred Supplier Part, the value will not be changed.

For Components, when you click on the **Cost** Cost button, the cost associated with the Preferred Manufacturer Part is shown in the **Target Cost** field. If there is no Preferred Manufacturer Part, the value will not be changed.

For Assemblies, when you click on the **Cost** Cost button, the cost of the assembly is rolled up and the total is displayed in the **Target Cost** field. This will be discussed in more detail in the “Cost Rollups” section on page 5-14.

Override Target Cost

In addition to the identification of incomplete cost data, Agile Advantage also uses the color red to indicate that the Target Cost for a particular component has been manually overridden. As is the case with the incomplete cost identification, you can see this both in the **Target Cost** field itself and on the BOM tree. Being able to see this on the BOM tree will quickly allow you to spot any components where the calculated cost has been overridden by a manually entered cost values. You can then determine whether the entered cost is one that you wish to maintain, or you can open the component or subassembly and force the recalculation based on the cost information associated with that component or sub-assembly.

Cost Rollups

One of the more powerful aspects of the Agile Product Sourcing product in the Agile Advantage suite is the ability to perform cost rollups within the user interface and to see the impact of changes to component costs in real time. To facilitate this process, the Target Cost is available for display on the BOM tree view. There is also a **Calculate** Calculate button on this tab, which will perform not only a cost rollup on the assembly itself, but will also recalculate the cost of every Manufacturer Part, every Component and every Sub-assembly. This ensures that at the time you click this button, you are seeing the most accurate cost data possible for the Assembly.

Note When performing cost analysis, it is important that you perform this calculation. If you do not, you could be working with a calculation performed at an earlier time that is no longer valid. It is a good practice to regularly click the **Calculate** Calculate button if you are making numerous changes to the cost data across the assembly.

Incomplete Cost Identification

Agile Advantage has included a special indicator to inform you when an Assembly has incomplete cost information. Incomplete cost information is defined as a component that has a null value for the **Target Cost** field. This is indicated by two asterisks after the Target Cost (e.g. $2.15**). The value $0.00 is not considered to be incomplete. This indicator enables you to perform a rollup on the BOM and instantly determine whether there are incomplete cost data by traversing the BOM tree to evaluate and correct any components that are missing cost data.

You can then click the **Calculate** Calculate button and repeat the process until the asterisks no longer appear. At that point, you will have a clear indication that you have complete cost data for your rollup.

Note Items, such as a Test Plan document, that may have a Target Cost of $0.00 are not treated similarly to those that have a NULL value for the cost.

Working with Standard Cost

For more information on working with Standard Cost, see the "Unit Cost Comparison Report" section on page 13-45 in the *Agile Advantage 2006 Windows Client User Guide*.

Where To Go From Here

If you want to get information on parts, documents, and changes in the Agile database, see "Searching for Objects" on page 1-13.

Once you are comfortable with using Agile to find things, you can learn how to create and release new objects:

- If you want to work with a part or document, see Chapter 3 entitled "Items (Parts and Documents)".
- To learn about manufacturing objects, see Chapter 4 entitled "Manufacturing Objects".
- If you want to work with a change, see Chapter 6 entitled "Changes".
- To learn about quality management objects, see "Objects and Classes" in Chapter 7 entitled "Agile Quality Management" if you have an Agile Quality Management license.
- To learn about working with attachments, see Chapter 10 entitled "Attachments".



CHAPTER 6
Changes

This chapter describes change objects, the Agile Advantage Web Client Changes page, and Agile workflows. It also shows you how to create, copy, delete, and edit changes. The main topics are:

- *Change Classes*
- *Change Page*
- *Creating Changes*
- *Agile Change Control Workflows*
- *Working with Changes*
- *After a Change is Released*
- *Switching Changes to Their Final Status*
- *Printing Change Tabs*
- *Redlining ECOs and MCOs*

***Note:** This chapter does not include information about corrective action requests (CARs). For information about CARs, see Chapter 7, "Agile Quality Management."*

Change Classes

Six classes, or types, of changes are available in the Agile Advantage Web client:

- Change Orders class, including engineering change orders (ECOs)
- Change Requests class, including engineering change requests (ECRs)

- Manufacturer Change Orders (MCOs) class, including manufacturing change orders (MCOs)
- Deviations class
- Stop Ships class
- Quality Change Requests (QCRs) class, including corrective action requests (CARs)

The purpose of each change class is listed in the following table:

Table 6-1: Change classes

Change type	Purpose
ECO	An *engineering change order* tells users that changes need to be made to specific items, and to go ahead and do the work. ECOs also let you release new items and redline BOMs, manufacturer data, and attachments (see "Redlining through ECOs" on page 6-59).
ECR	An *engineering change request* is used to request a change to be made to items. ECRs do not have any redlining functions.
Deviation	A *deviation* is used to switch from one part to another for a specific amount of time. Deviations do not have any redlining functions.
Stop Ship	A *stop ship* alerts users to stop shipping or using an item. Stop ships do not have any redlining functions.
MCO	A *manufacturer change order* tells users that changes need to be made to the manufacturing data of specific items. MCOs allow you to redline the **Manufacturers** tab of an item, release new items, and change the lifecycle phase of items. See "Redlining through MCOs" on page 6-59.
CAR	A *corrective action request* (in the Quality Change Requests class) is used to request a change to be made to items. CARs addresses defects that surface from issues and problem reports. CARs do not have any redlining functions.

Note CARs and quality change requests (QCRs) are available if your company is licensed to use the Agile Quality Management product. For more information about CARs, see Chapter 7, "Agile Quality Management."

Change Subclasses

Under each change class, there may be as many subclasses as needed. For example, under the Change Orders class, you might have ECOs, Mechanical ECOs, Software ECOs, and so on. See "Object Superclasses, Classes, and Subclasses" on page 1-7.

Your Agile administrator may decide to use some or all of these change classes and may create new subclasses for your company.

For more information about change classes and subclasses, see "Changing a Change's Subclass" on page 6-55.

Change Page

Note For information about the Change page for CARs, see "Corrective Action Requests" on page 7-13.

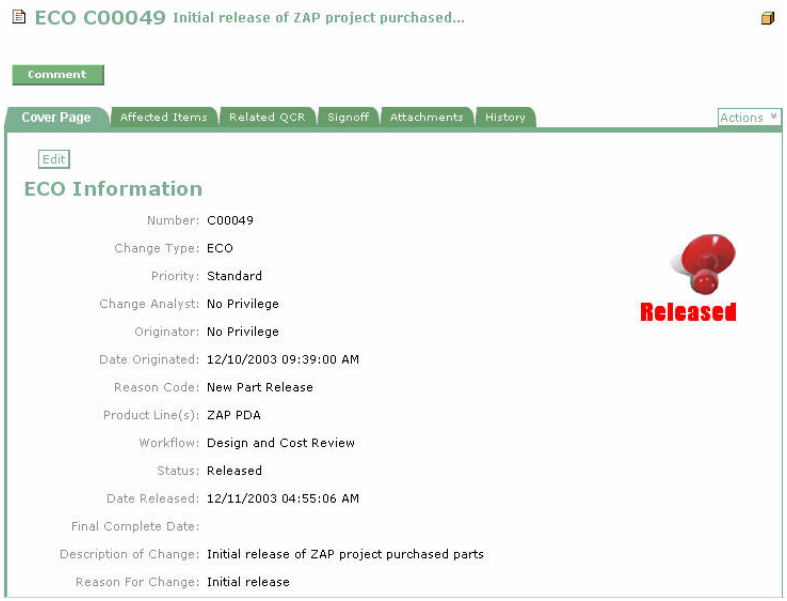
This section includes the following topics:

- Change Page Tabs
- Cover Page Tab
- Affected Items Tab
- Related QCR Tab of ECOs
- Signoff Tab
- Attachments Tab
- History Tab
- Creating Changes

For information about locating and opening a change, see Chapter 12, "Searching for Objects."

When you open a change, it appears on the Change page, shown in the following figure. If your company is licensed to use Agile Quality Management features, ECOs may have an additional tab showing related QCRs.

Figure 6-1: A Typical Change Page



Note Remember that your Agile administrator might have changed the Agile Web client interface, so the page may look different in some ways.

Change Page Tabs

When you view a change, you are viewing a set of tabs on the Change page. A typical change is shown in Figure 6-1.

The following table shows the tabs and some of the fields for changes. It also shows the page where that tab is described.

Table 6-2: Change tabs

Tab name	Tab fields include	Tab information includes
Cover Page (page 6-5)	**Change Type**, **Change Analyst** or **Component Engineer**, **Originator**, **Status**, **Date Originated**, **Number**, **Description**, **Reason for Change**, **Change Category**, **Reason Code**, **Workflow**, **Final Complete Date**, **Date Released**, **Product Line(s)**	General information about the change plus any unique fields defined by the Agile administrator.

Table 6-2: Change tabs

Tab name	Tab fields include	Tab information includes
Affected Items (page 6-11)	**Old Rev**, **Old Lifecycle Phase**, **New Rev**, **Obsolete Date**, **Effective Date**, **Lifecycle Phase**, **Change Function**, **Item Description**, **Item Number**	Which items are affected by the change. ECOs also include redlined bills of material, redlined manufacturers and redlined attachments.
Signoff (page 6-12)	All workflow statuses, signoff user, reviewer, approvers and observers and their actions, **Local Client Time**, **Signoff Comments**	Approvers and observers of the change and the results of their reviewing the change.
Attachments (page 6-14)	**File Description**, **File Name**, **File Version**, **File Size**, **File Type**, **Modified Date**, **Last View Date**, **Checkout User**, **Checkout Date**, **Checkout Folder**	Attached files.
History (page 6-15)	**Action**, **User**, **Status**, **Next Status**, **Local Client Time**, **Find Number**, **Details**, **Comments**	All actions taken on the change.

The following sections describe the tabs that display information about changes, and the information you can find on them.

Cover Page Tab

The **Cover Page** tab shows the information traditionally shown on a paper ECO form.

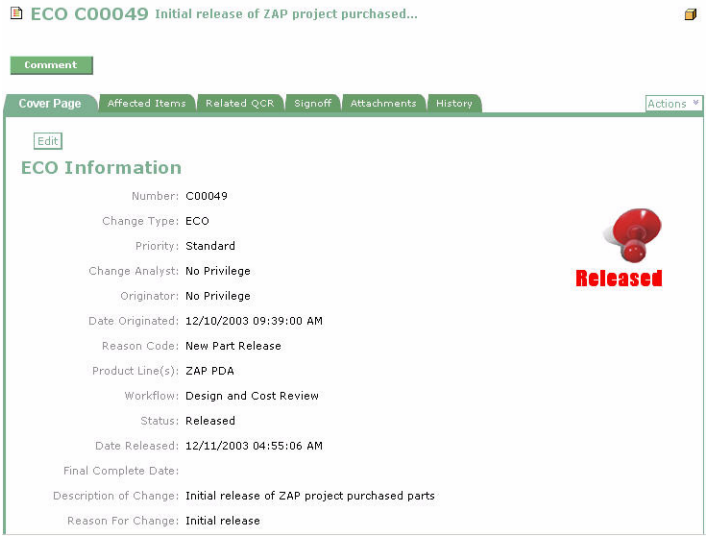
This section contains the following topics:

- Change Type Icons on the Cover Page Tab
- Fields on the Cover Page Tab
- Status on the Cover Page Tab

Note For information about the Cover Page tab of a CAR, see "Fields on the CAR Cover Page" on page 7-14.

The following figure shows a sample **Cover Page** tab.

Figure 6-2: Cover Page Tab of an ECO



To edit fields, click the **Edit** button. Sometimes you cannot edit a field. The field may be uneditable for two reasons:

- The change has been released.
- You do not have sufficient privileges or the appropriate license to modify that field.

For information about editing the **Cover Page** fields, see "Fields on the Cover Page Tab" on page 6-7.

Change Type Icons on the Cover Page Tab

Each type of change has a distinguishing icon. In the Agile Web client, these icons are displayed next to the change number on the Cover Page, and next to each change on the Search Results page.



The ECO **Cover Page** tab has a **Change Type** and a **Change Category** field. These fields are created automatically.



Except for the icon in the upper left corner of the tab, the ECR **Cover Page** tab looks the same as an ECO **Cover Page** tab and behaves the same way as an ECO **Cover Page** tab. An ECR is used to request a change.



The **deviation Cover Page** tab has two unique fields: **Effective From** and **Effective To**.



The **stop ship Cover Page** tab has one unique field, **Resume Date**.



The MCO **Cover Page** tab has a **Component Engineer** field in place of the **Change Analyst** field.

Fields on the Cover Page Tab

The **Cover Page** tab shows the information traditionally shown on a paper ECO form. The Agile Advantage system completes some of the fields; you complete the rest.

The following table summarizes the Cover Page fields and what they contain. The fields on the **Cover Page** tab vary from one change type to another.

Table 6-3: Cover Page tab fields

Field	Completed...	Contains...
Number	Automatically, when created.	The number assigned to the change when you create it.
Change Type	Automatically, when created.	The type of change selected when you create the change.
Category	Manually from a drop-down list.	the level of priority of the change.
Change Analyst or **Component Engineer**	May be provided automatically by the workflow; otherwise selected manually from a drop-down list. Departments appear first in the list, followed by individual usernames.	Default change analyst or default component engineer. If the workflow is defined to notify the default change analyst or component engineer, the department or user in this field receives notifications about the change. If this field is left blank, then the notifications are sent to every change analyst or component engineer on the list. If the notification definition in the workflow is blank, no notifications are sent.
Originator	Usually automatically, when created (with the default set by the Agile administrator).	The user who created the change (can be selected from a drop-down list).
Date Originated	Usually automatically, when created.	The date the change was created.

Table 6-3: Cover Page tab fields (continued)

Field	Completed...	Contains...
Reason Code	Usually automatically, when created (with the default set by the Agile administrator).	Drop-down list of categories defined by the Agile administrator.
Product Line(s)	Usually manually; can contain a default.	Drop-down list of categories defined by the Agile administrator.
Workflow	Automatically (if only one workflow applies to the change), when the change is moved to the next status from the Unassigned status. If more than one workflow applies to the change, the workflow is selected manually; the workflow selection can be changed as long as the change is in the Pending type status. Selecting the blank field in the **Workflow** drop-down list switches the change to the Unassigned status.	The name of the workflow being used to move this change through the change control process.
Status	Automatically, when created; updated as the change moves through the assigned workflow.	Change status, described in "Status on the Cover Page Tab" on page 6-9; if no workflow has been selected, this field is Unassigned.
Date Released	Automatically, when released.	The date the change was released.
Final Complete Date	Automatically, when the change enters the Complete type status.	The date the change moved into the Complete type status.
Description Of Change	Usually manually; can contain a default.	Maximum number of bytes is set by the Agile administrator; can be up to 1023 bytes, including spaces and carriage returns (which count as 2 bytes).
Reason For Change	Usually manually; can contain a default.	Maximum number of bytes is set by the Agile administrator; can be up to 1023 bytes, including spaces and carriage returns (which count as 2 bytes).

The deviation **Cover Page** tab has two unique fields, **Effective From** and **Effective To**. The stop ship **Cover Page** tab has one unique field, **Resume Date**. There are two ways to complete or edit date fields, as explained in "Modifying Date Fields" on page 16-5.

The MCO has a **Component Engineer** field (in the place of a **Change Analyst** field), and has the same list of reason codes as all other changes.

Status on the Cover Page Tab

The Agile Web client uses a "stamp" in the top right corner of the **Cover Page** tab to indicate the status of a change. Your Agile administrator defines the name of each status in each workflow.

Your Agile administrator may have created customized workflows and status stamps for your company. The following table shows only the Agile default workflow status stamps.

Note For information about status stamps for CARs, see the *Administrator User's Guide*.

Table 6-4: Default workflow change status stamps

Status stamp	Status name	Status definition
	Unassigned (no status type)	No workflow has been assigned to this change. The originator may still be developing the change. No statuses are displayed on the **Signoff** tab.
	Pending (Pending status type)	The originator may still be developing the change. It has not yet been approved or perhaps even completed.
	Submitted (Submit status type)	The change has been routed to the change analyst or component engineer for review and analysis.
	CCB (Review status type)	The change has been routed to the members of the Change Control Board (CCB) for approval.

Table 6-4: Default workflow change status stamps (continued)

Status stamp	Status name	Status definition
	Released (Released status type)	The change has been signed off by the CCB members and released.
	Closed (Complete status type)	The change is an ECR that has been accepted and implemented.
	Expired (Complete status type)	The change is a deviation where the “Effective To” date has been reached.
	Implemented (Complete status type)	The change is an ECO that has been implemented or incorporated into new drawings.
	Hold (Hold status type)	The change has been placed on hold while information is being gathered by the component engineer.
	Resumed (Complete status type)	The change is a stop ship that has been lifted. Production of affected items can resume.
	Canceled (Cancel status type)	The change has been canceled due to a fundamental flaw or rejection by several people.
	First Article Complete (Complete status type)	The manufacturer part has been received and passed incoming inspection or quality assurance. The physical part has been validated against design documents or specifications (MCO only).

The **Signoff** tab shows all the statuses the change has been through, and the statuses remaining to complete the change control process. See "Signoff Tab" on page 6-12.

With appropriate privileges, you can switch a change to another status with the **Signoff** tab or the **Next Status** button. For more information, see "Switching Changes from One Status to Another Status" on page 6-33.

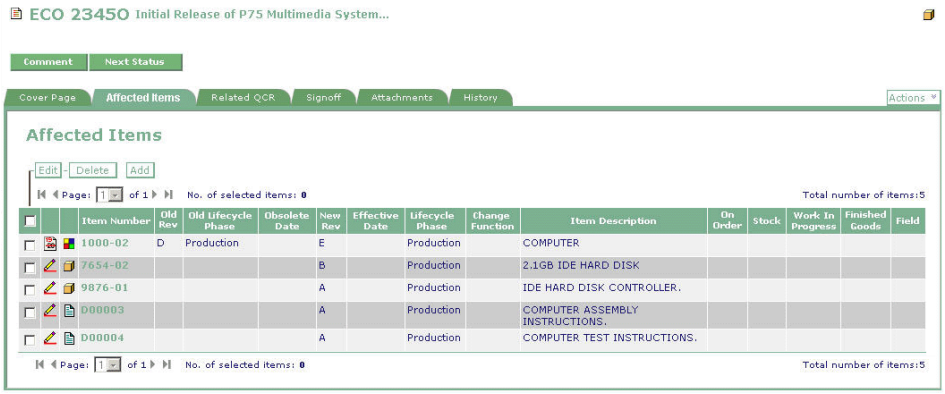
Affected Items Tab

The **Affected Items** tab lists the items that are affected by a change. Users with sufficient privileges can complete the **Affected Items** tab and use it to redline BOMs and manufacturing data.

Note If you do not have Discovery and Read privileges for an item, it does not appear on the **Affected Items** tab. You may see a message at the bottom of the page telling you how many items are not displayed. For more information, see "Details About the Discovery and Read Privileges" on page 15-2. If you have questions about your Discovery or Read privileges, see your Agile administrator.

The following figure shows the Agile Web client's **Affected Items** tab of an ECO. For more information about the **Affected Items** tab, see Chapter 9, "Affected Items of Changes." For information about the Affected Items tab of a CAR, see "Affected Items Tab of a CAR" on page 7-16.

Figure 6-3: Affected Items Tab for a Change



To view an item listed on the **Affected Items** tab, click its number.

Related QCR Tab of ECOs

Companies licensed to use the quality tracking features of Agile include an additional tab on ECOs: the **Related QCR** (quality change request) tab of an ECO lists CARs that have the ECO listed on their **PSR And Changes** tab.

For more information about quality tracking, see Chapter 7, "Agile Quality Management."

Signoff Tab

The **Signoff** tab shows all the statuses the change has passed through, and which statuses remain to be completed. It also shows all the approvals and rejections made during each approval cycle. For example, suppose a change is returned to the originator, reworked, and then resubmitted for a second approval cycle. The **Signoff** tab shows the approvals and rejections of the change made during the first approval cycle, and during the second approval cycle. (See "Demoting a Change" on page 6-35 for details.) This information also appears on the **History** tab.

The **Signoff** tab includes the following fields:

- **Workflow** — the name of the workflow the change is following
- **Workflow Status** — the name of the status
- **Status Changed by** — the name of the user who switched the status
- **Local Client Time** — the date and time the status was changed

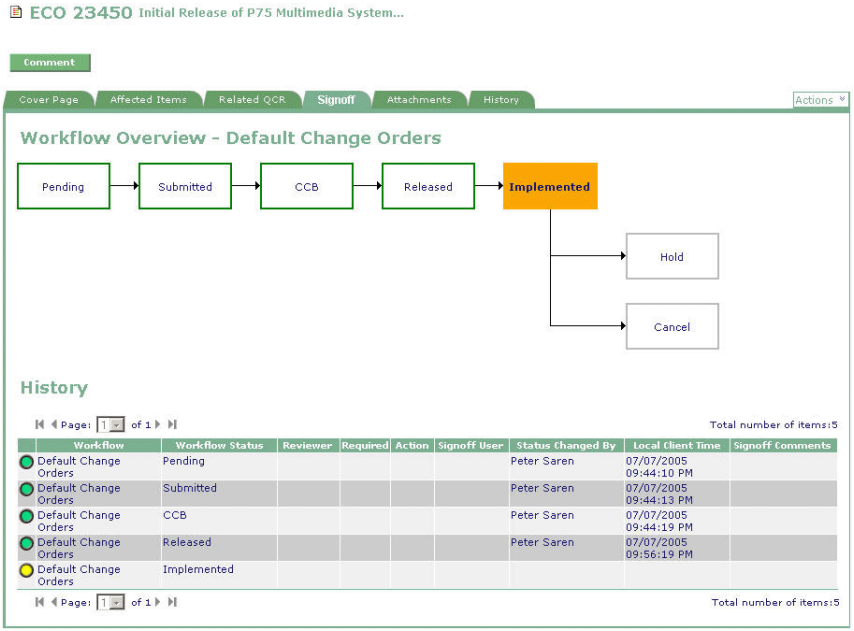
In addition, if the change is in a state where there are approvers, the **Signoff** tab lists:

- **Reviewer** — approvers and observers who have been assigned to approve and observe the proposed change
- **Action** — the action taken by the approver or observer
- **Signoff User** — the name of the person who actually approved or rejected the change
- **Local Client Time** — the date and time of the action
- **Signoff Comments** — any comments made by the approvers and observers during signoff

The **Signoff** tab also includes a chart of the workflow, which shows all possible status names for that change. The current status is highlighted. With appropriate privileges, you can use the **Signoff** tab to promote and demote a change manually; click a status to select it.

The following figure shows the **Signoff** tab of an ECO.

Figure 6-4: Signoff Tab



The **Add Approvers/Observers** and **Remove Approvers/Observers** commands on the **Actions** menu are controlled by the Ad Hoc Approvers/Observers property settings in each workflow. For you to be able to add or remove approvers and observers, your company must be licensed to use the change collaboration features, and you must have the appropriate privileges. If your Agile administrator has not granted the appropriate privileges to you, the commands are not available.

Note Your Read privileges determine whether or not you can read the contents of all the fields on the **Signoff** tab. See "Details About the Discovery and Read Privileges" on page 15-2. If you have questions about your Read privileges, see your Agile administrator.

User Action Timestamp

Agile Advantage provides two ways to record the date and time of any action taken against the change:

- **Local Client Time** — this is the date and time as shown on the local client computer of the user who is viewing the timestamp. Local client time is the default method of viewing timestamps.

  For example, if Mary approves a change at 12 noon in New York (Eastern time), when John looks at the **Signoff** tab of the change in California, he sees the time Mary approved the change as 9 o'clock in the morning (Pacific time).

- **User Action Time** — this is the date and time on the computer where the action was performed. User action time is optional.

  If Mary approves a change at 12 noon in New York, when John in California looks at the **Signoff** tab of the change, he sees the following:

  - In the **Local Client Time** column, the time Mary approved the change is 9 o'clock in the morning (Pacific time).
  - In the **User Action Time** column, the time Mary approved the change is 12 noon (Eastern time).

  When Mary looks at the **Signoff** tab of the change, she sees the following:

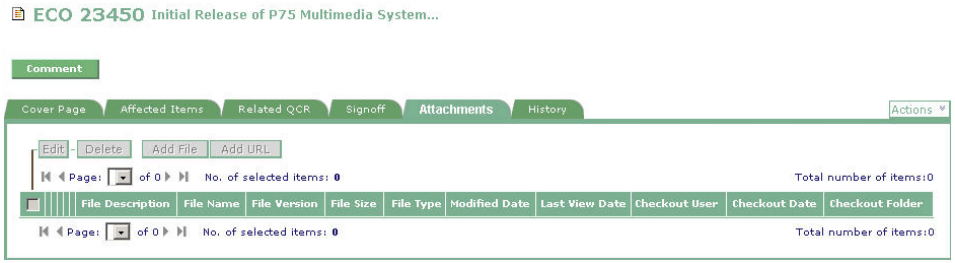
  - In the **Local Client Time** column, the time she approved the change is 12 noon (Eastern time).
  - In the **User Action Time** column, the time she approved the change is 12 noon (Eastern time).

Local Client Time always appears on the **Signoff** tab and **History** tab. **User Action Time** is optional, and is displayed on the **Signoff** tab of changes and the **History** tab of any Agile object only if the Agile administrator specifies this.

Attachments Tab

The **Attachments** tab lists the files that have been attached to an object. All Agile objects have an **Attachments** tab. Attached files can be drawings or scanned images, documents, non-viewable files, compressed files, and so on. You can also point to a URL instead of a local attachment.

Figure 6-5: An Attachments Tab for an ECO



The preceding figure shows an **Attachments** tab for an ECO.

For more information about attachments and the **Attachments** tab, see Chapter 10, "Attachments."

Note Attach any pertinent files to a pending revision of an affected item. Then they automatically remain with the revised item when it is released. Creating a pending revision of an item is described in "Working with Pending Revisions" on page 3-17.

When you create a revision of an item, it automatically inherits the files that are attached to the current default revision (provided the relevant SmartRule is set to Allow). For more information, ask your Agile administrator.

History Tab

The **History** tab shows a summary of actions taken against the change, including:

- The current status of the change
- The next status of the change
- A description of the action
- Which user took the action
- The date and time of the action (local client time)
- The user action time (optional; see "User Action Timestamp" above)
- Which affected item was the subject of the action
- The find number of the component of the affected item
- Details of the action

- Comments made by users
- Users notified

While the change status is Unassigned or Pending, the creation of the change and any subclass modifications are recorded on the **History** tab, but no other actions are recorded. A change must have a status type other than Pending, such as Submit or Review, before actions are recorded on the **History** tab.

The types of actions recorded are:

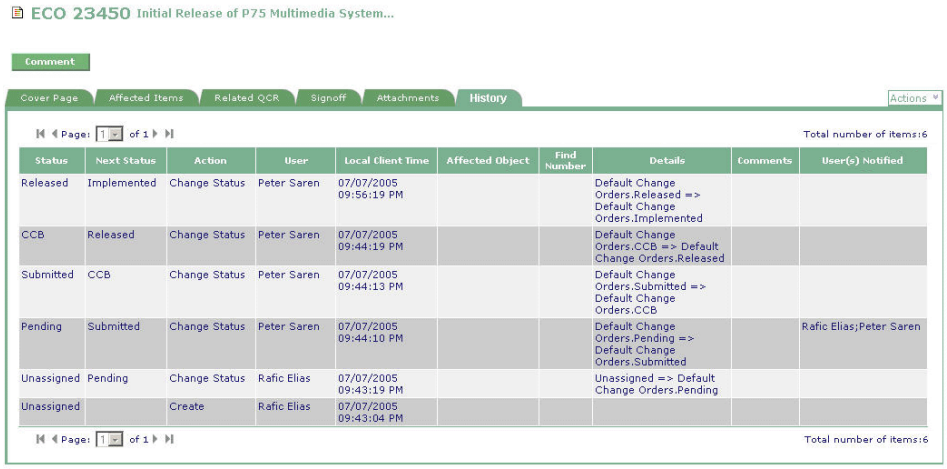
- Modify an item on the **Affected Items** tab
- Redline an item on the Redlines page of the **Affected Items** tab
- Modify an attachment on the **Attachments** tab
- Add or delete approvers
- Approvals and rejections
- Field change, any tab
- Status change
- Autopromotion failure
- Subclass change
- Comments
- Send
- Print

Notes If you do not have the appropriate Read privileges, you cannot view the fields on the **History** tab. See "Details About the Discovery and Read Privileges" on page 15-2. If you have questions about your privileges, see your Agile administrator.

When you make modifications to a date field on a change after the change has exited the Pending type status, the Agile Advantage system records the dates and times in the **Details** column of the **History** tab using the local date and time on the computer where the Agile eHub is installed. Agile Advantage uses a static format, for example, `2001/08/02 15:00:23 (GMT - 07:00) (yyyy/MM/dd)` (Greenwich Mean Time). This format may not be the same as the date and time formats used elsewhere in the Agile Web client.

The following figure shows the **History** tab of an ECO.

Figure 6-6: History Tab of an ECO



Note Comments on the **History** tab are different from the comments on the **Signoff** tab. Comments on the **Signoff** tab come from approvers and observers when they perform the online approval process. Comments on the **History** tab can be made by anyone with sufficient privileges at any time.

Custom Tabs: Page Two and Page Three Tabs

Your Agile Administrator may add **Page Two** and **Page Three** custom fields to the **Cover Page** tab for changes or to the **General Info** tab for manufacturing objects.

Creating Changes

If you have the appropriate privileges, you can create or modify a change.

This section includes the following topics:

- Creating and Completing Changes with the Create Command
- Creating a Change Using the Save As Feature
- Modifying Fields

Note For information about creating a CAR, see “Creating a CAR” on page 7-36.

Creating and Completing Changes with the Create Command

When you create a change, you select a change type (subclass) and assign a number, then enter information for each tab. The Create wizard leads you through each step.

Note The following instructions are for creating an ECO. The wizard steps for other kinds of changes may differ slightly but are very similar.

To create and complete a change:

1. Choose **Create | Change**.

   The Create New Change page appears.

2. Select a subclass from the list.

3. Type the number of the proposed change in the **Number** field. Or click the **AutoNumber** button 123 to have the Agile Web client automatically enter the number. The autonumber format and sequence are determined by the Agile administrator.

4. Click **Next**.

   The Agile Web client creates the proposed change and displays the Enter Cover Page Information page, where you enter descriptive information about the change.

   Note Once the Agile Web client creates a change, that change exists until you delete it, as described in "Deleting Changes" on page 6-51. If you create a new change, then decide you do not wish to keep it, be sure to delete the change; otherwise, the new change remains in the database, and the number cannot be reused.

5. Enter the Cover Page information by typing and selecting from lists. When it is complete, click **Next** to add affected items information and attachments, or click **Finish** to save the Cover Page information and display the change.

6. If you click **Next**, the Add Affected Items page appears. Use the **Add** button to add existing or new affected items as described in "Adding an Item to the Affected Items Tab" on page 9-6.

7. When you finish adding affected items, click **Next** to add attachments, or click **Finish** to save the affected items information and display the change.

8 If you click **Next**, the Add Attachments page appears. You can add drawings, documents, and photographs to the attachments vault or point to a URL with information about an intranet or Internet site. For details, see "Adding Attachments" on page 10-6.

9 When you finish adding attachments, click **Next** to submit the change for routing, or click **Finish** to save the attachments information and display the change.

10 If you click **Next**, the Save or Submit page appears. Select whether to save the change without submitting it or to save and submit it now. For more information about submitting changes, see "Completing the Change Status Page" on page 6-36.

11 When you are done, click **Finish** to save the change. If you chose to submit it, the status stamp says "Submitted" by default.

Creating a Change Using the Save As Feature

Using the Save As feature is a quick way to create a new change that is very similar to an existing change.

Note The Save As feature does neither copy the BOM, AML nor File redlines

Note If you do not have Discovery and Read privileges for any of the items on the **Affected Items** tab of the existing change, you cannot use Save As to create a new change.

To create a change using Save As:

1 Select or open an existing change.

2 Open the **Actions** menu and choose **Save As**.

The Save As page appears.

3 (If appropriate) Select a different change type from the **Sub Type** list.

4 Enter the new change's number. Or click the **AutoNumber** button 123 to assign an autonumber to the change.

5 Click **Save As**.

The Agile Web client creates and displays the new change.

6 Make any necessary modifications to any of the other tabs, following the instructions in the following section, "Modifying Fields."

Note The new change does not have a workflow assigned to it and has a status of **Unassigned.**

Caution! This process must be done with the Agile Web client **Save As** command, as described. It is not possible to perform this process using the browser menu commands, which perform a very different function.

Modifying Fields

With sufficient privileges, you can modify editable fields. You can modify only fields that have been made editable by the Agile administrator.

The Change page opens with the **Cover Page** tab on top. Each type of change has a different **Cover Page** tab.

To complete a change:

1. Click **Edit** and complete or change the appropriate fields on the **Cover Page** tab. Click **Save** when you finish editing the **Cover Page** tab.
2. On the **Affected Items** tab, add all appropriate items. For more information, see "Adding an Item to the Affected Items Tab" on page 9-6.
3. On the **Attachments** tab, add all appropriate files. For more information, see "Adding Attachments" on page 10-6.

You do not enter information on the **Signoff** or **History** tabs; the Agile Web client automatically completes these.

New changes are automatically saved when you click the **Finish** button on the Create page.

Agile Change Control Workflows

An Agile workflow is a sequence of statuses that a change follows as it goes through the change control process. Your Agile administrator specifies the name of the workflow, the number and names of the statuses, and the properties that define each status.

This section includes the following topics:

- Matching Criteria
- Workflow Status List
- Viewing the Workflows Used at your Site

- Default Workflows
- Example of a Customized Workflow
- Using Workflows in the Change Control Process

Agile Advantage provides default workflows for each change type; however, your Agile administrator can create as many custom workflows as needed. Workflows are versatile. For example, a workflow can be created for different types of changes, for specific product lines, or for changes with specific types of items on the **Affected Items** tab. When you create and edit a change, you select from a list of valid workflows for that change.

Workflows automate the change control process by performing or completing tasks that you previously performed manually. For example:

- When you create a change, you can select the appropriate workflow from the list of available workflows for that change.
- When the change moves into a Review or Released status type, the list of approvers and observers is automatically selected.
- When all the approvers have signed off for a Review or Released type status, and all the required fields have been completed, the change can be automatically promoted to the next status by the AutoPromote feature.
- By defining a workflow with multiple Review or Released type statuses, changes can be serially routed to different lists of approvers and observers.
- When all required fields are filled in on a change, it can be autopromoted to the next status.
- When an approver does not respond within the specified reminder period set by the Agile administrator, a reminder email is sent automatically.
- If the approver does not respond within the specified escalation period set by the Agile administrator, the change is sent to that user's designated escalation person. The designated escalation person can then approve or reject the change in place of the original approver.
- You can transfer your authority to approve changes to another user for a specified period of time. If you have the appropriate privileges, you can similarly transfer signoff authority for other users.

A workflow consists of:

- A unique name

- A list of matching criteria
- A list of statuses

Matching Criteria

Matching criteria are used to find which workflows may be used for each change. The Agile Web client matches each change to a list of valid workflows for that change. For details, see "About Matching Criteria in Workflows" on page 15-7.

Workflow Status List

The status list defines the ordered list of statuses (or steps) that the change must go through during the change control process. The Agile administrator can define each workflow to have as many statuses as required. Each status has a status type. Some status types may be used only once in a workflow, while others may be used multiple times.

The following table lists and defines the seven different status types.

Table 6-5: Status types that may be used in an Agile workflow

Type of Status		
Pending	Required Used once	The first status type in every workflow.
Submit	Not required Unlimited use	The Submit status type may be used multiple times in a workflow. This status type sends the change to the specified change analyst or component engineer. The change analyst then decides whether or not to promote the change to the next status in the status list.
Review	Not required Unlimited use	The Review status type may be used multiple times in a workflow. This status type routes the change to a list of approvers and observers. When all the approvers have signed off, if the required fields are filled in, the change is automatically promoted to the next status in the status list (if AutoPromote is on).

Table 6-5: Status types that may be used in an Agile workflow

Type of Status		
Released	Not required Unlimited use	The Released status type may be used multiple times in a workflow. However, only when a change enters the first Released type status, a series of checks is performed, and new revisions of the affected items are created (ECOs), or the manufacturer part information is updated (MCOs). Subsequent Released type statuses provide additional approval cycles for the Released change. Like a Review type status, the Released type status may also have approvers and observers and be routed for signoff and may be autopromoted.
Complete	Not required Used once	The Complete status type may be used only once in a workflow. If this status type is used, it is the last status in the workflow.
Hold	Not required	This status type is not part of the sequential status list of the workflow; it provides a method for temporarily stopping a change from moving through the workflow. You can manually switch a change to a Hold type status from other statuses in the workflow. The change stays in a Hold type status until you manually switch it to another status in the workflow.

Table 6-5: Status types that may be used in an Agile workflow

Type of Status		
Cancel	Not required	This status type is not part of the sequential status list of the workflow; it provides a method for canceling the change at any point in its workflow. You can manually switch a change to a Cancel type status from any other statuses in the workflow. The change stays in a Cancel type status until you manually switch it to another status in the workflow. If you cancel a released change order, the revision is removed from the item revision list of the affected items. A change with affected items that has been canceled cannot be uncanceled (moved to a different status in the workflow).

Viewing the Workflows Used at your Site

You can view all the workflows used at your company by using the **View Workflows** command on the **Actions** menu. This feature allows you to browse through the available workflows and their status lists at any time. You can familiarize yourself with the various workflows before you select one for a change.

To view all workflows and their status lists:

1. Open a change, following the instructions in "Locating and Viewing Agile Objects" on page 16-1.
2. Choose **Actions | View Workflows**.

   The View Workflow page appears.
3. Select a workflow from the list.

   A flow chart of the workflow's status sequence appears below the list.
4. To close the View Workflow page, click **OK**.

Default Workflows

Agile Advantage includes default workflows for each change type. Default workflows provide the same change control process as Agile Anywhere Release 6.

Note For information about the default workflow for quality change requests (QCRs, which include CARs), see the *Agile Administrator 2006 User Guide*.

Table 6-6: Lists of statuses in the default workflows

Sequence	Default change orders	Default change requests	Default deviations	Default stop ships	Default manufacturer orders
1st	Pending	Pending	Pending	Pending	Pending
2nd	Submitted	Submitted	Submitted	Submitted	Submitted
3rd	CCB	CCB	CCB	CCB	CCB
4th	Released	Released	Released	Released	Released
Final	Implemented	Closed	Expired	Resumed	First Article Completed
The Hold and Canceled statuses are optional statuses that not part of the sequential status list:					
Optional	Canceled	Canceled	Canceled	Canceled	Canceled
	Hold	Hold	Hold	Hold	Hold

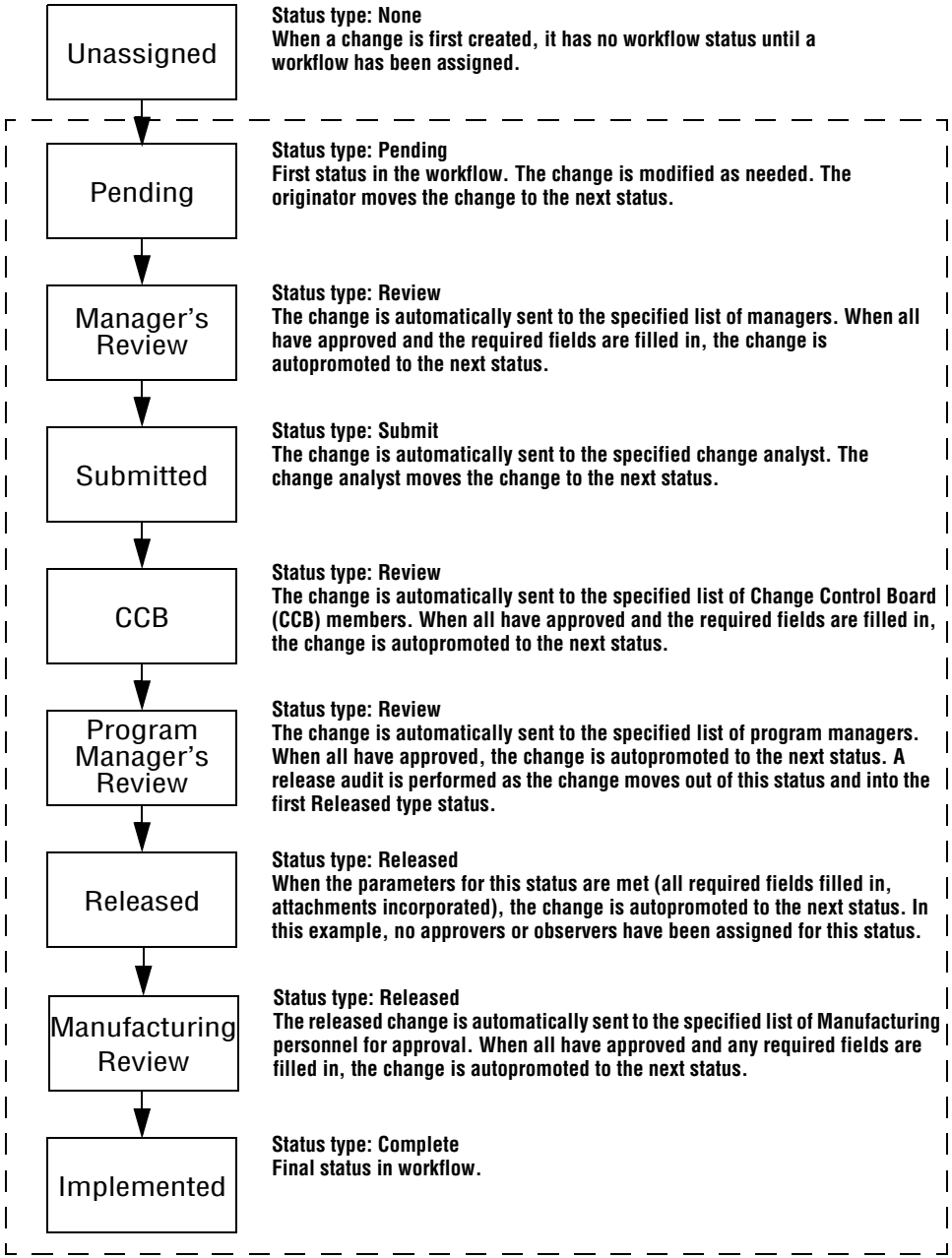
Example of a Customized Workflow

Figure 6-7on page 6-26 shows an example of a customized workflow. Notice that this workflow has four different Review type statuses and two different Released type statuses. A change using this workflow is:

- Routed through an approval cycle (Review type status) before it is submitted to the change analyst.
- Routed through two approval cycles (Review type status) before it is released, with a different group of approvers for each approval cycle.
- Released when it moves into the first Released type status.
- Moved into the second Released type status after the required fields have been filled in and, at this status, routed for approval a final time before moving into the Complete type status.

Customized Agile workflows allow great flexibility in defining change control processes that meets your company's needs.

Figure 6-7: Example of a customized Agile workflow



Using Workflows in the Change Control Process

When a change is first created, it has no workflow assigned to it; therefore, it has no workflow status. Until you select a workflow for the change, it remains unassigned, and the Unassigned status stamp is displayed in the upper right corner of the **Cover Page** tab.

Note Using the **Next Status** button or **Signoff** tab does not switch an unassigned change to the Pending type status. For information about how to switch an Unassigned change to the Pending type status, see "Selecting a Workflow" below.

You can edit an Unassigned change the same way you edit a change in a Pending status type: fill in fields, add items to the **Affected Items** tab, add files to the **Attachments** tab, and so on.

When you have finished editing an Unassigned change, or a change in the Pending type status, and you are ready to start the change moving through the change control process, use the **Next Status** button. For instructions, see "Starting an Unassigned Change Through a Workflow" on page 6-28.

Selecting a Workflow

To select a workflow for an Unassigned change from the Cover Page:

1 On the **Cover Page** tab, click **Edit**, then click the button on the **Workflow** field.

All the workflows that match the change are shown in the drop-down list. The drop-down list may vary depending on how you have edited the change.

2 Select a workflow from the list, and click **Save**.

The status of the change switches to the first status in the selected workflow, which is always a Pending status type.

Note As long as the change is in the Pending type status, you can select a different workflow. You can also select the blank field in the **Workflow** drop-down list, which switches the change to the Unassigned status and cancels the previous workflow selection.

To select a different workflow for a change that is not in either the Unassigned status or the Pending type status, you must switch the status to the Pending type status first. See "Returning a Change to the Originator" on page 6-47.

Starting an Unassigned Change Through a Workflow

Until you select a workflow for a change, the change remains unassigned, and the Unassigned status stamp is displayed in the upper right corner of the **Cover Page** tab.

When you have finished editing an unassigned change, or a change in the Pending type status, and you are ready to start the change moving through the change control process, use the **Next Status** button.

To start the Unassigned change moving through the change control process:

1. Click the **Next Status** button above the change tabs.
2. If there is no workflow assigned, you are prompted to select one.
3. Specify users to notify and add any comments. See "Completing the Change Status Page" on page 6-36. Click **OK**.

Working with Changes

This section includes the following topics:

- Auditing Changes
- Switching Changes from One Status to Another Status
- Demoting a Change
- Completing the Change Status Page
- Handling Routed Changes
- Approving Changes
- Rejecting Changes
- Reminder Period and Review Escalation Period
- Designated Escalation Person
- Transferring Signoff Authority
- Returning a Change to the Originator
- Canceling a Change
- Uncanceling a Change
- Putting a Change on Hold
- Deleting Changes

- Undeleting Changes
- Releasing Changes
- Unreleasing Changes
- Multiple Released Type Statuses
- Changing a Change's Subclass

Auditing Changes

You can audit a change at any point in the change's lifecycle. Before switching the change to a different status, always audit the change to detect any errors that may prevent switching to a different status. See "Switching Changes from One Status to Another Status" on page 6-33.

With appropriate privileges, you can perform two types of audits:

- Current status audit

  The **Audit Status** command on the **Actions** menu checks that all required fields for the current status are filled in. If the change is in a Review type status or a Released type status, **Audit Status** also checks whether or not all the approvers have approved the change.

- Release audit

  The **Audit Release** command on the **Actions** menu checks that the change is ready for release.

  The release audit performs the status audit (described above) for the current status only, and the following additional checks:

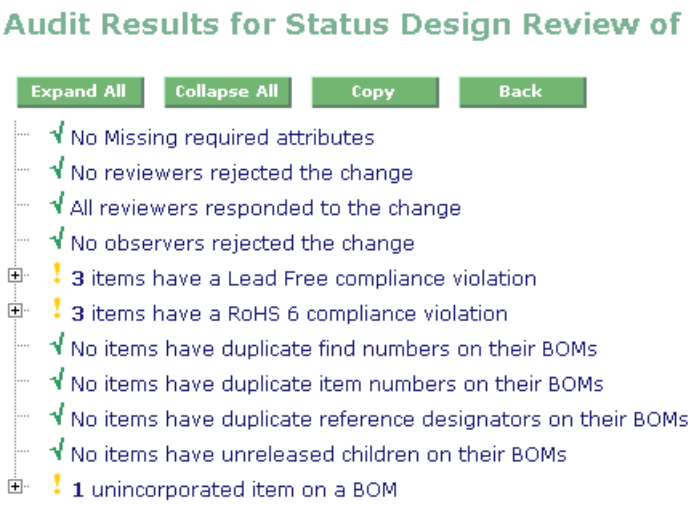
  - For change orders (ECOs), checks if the proposed new revision number on the **Affected Items** tab already exists.
  - For ECOs and MCOs, checks if there are BOM or manufacturer redlines that will be lost after the change has been released.
  - For ECOs and MCOs, checks if there are conflicts due to another ECO or MCO being released first.
  - For ECOs and MCOs, if the ItemsReleasedFirst SmartRule is set to Disallow or Warning, then the change is checked to see if the child components have been released.
  - Checks if any of the attachments of the change remains checked out.

- For every affected item, checks if any of the attachments remains checked out.
- Checks the Effectivity Date Order and Effectivity Gap SmartRule settings.
- Checks if items on the **Affected Items** tab have any other pending changes.

Note When a change moves from the Pending type status (the first status in the workflow) to the next status in the workflow, the Agile Web client automatically performs a release audit.

The audit results box remains open until you close it. This allows you to refer to the audit results as you modify the change.

Figure 6-8: Audit Results For Status



Note Your Discovery and Read privileges determine which objects and which fields you can see in the audit results box. If you do not have the appropriate privileges, you may see the words "No Privilege" displayed. See "Details About the Discovery and Read Privileges" on page 15-2.

To audit the current status of a change:

1 Open the change you want to audit.
You may audit a change from any tab.

2 Choose **Actions | Audit Status.**
The **Audit Results** page appears displaying four buttons and a tree view with nodes and subnodes. These nodes and subnodes represent Audit warnings or errors (*e.g.* "*No missing required attributes*" as displayed in Figure 6-8 above), which constitute links to Items or Manufacturer Parts, and that you can correct and audit again.

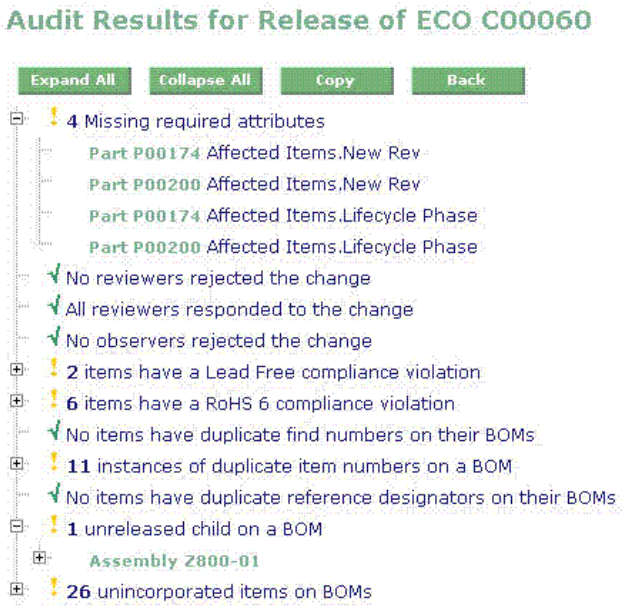
3 Choose one of the four buttons described below:

- **Expand All -** This button displays all the subnodes.
- **Collapse All -** This button reduces all the subnodes.
- **Copy -** This button copies the audit statuses and pastes them into another file, such as Notepad, Microsoft® Word or Excel enabling you to use it as a work sheet.
- **Back -** By using this button, you can return to the change.

Auditing the current status ensures that the change is ready to move out of the current status. It performs the following checks:

- ❑ Makes sure all the required fields for the current status are filled in.
- ❑ If it is a Review type status, makes sure that all approvers have approved.
- ❑ If the Pass Release Audit property for the current status is set to Yes, the Agile Advantage system also performs a release audit.

Figure 6-9: Audit Results For Release of ECO



To audit the change for release:

1. Open the change you want to audit for release.

   You may audit a change from any tab.

2. Choose **Actions | Audit Release.**

3. The **Audit Results for Release** page appears displaying four buttons and a tree view with nodes. These nodes represent Audit warnings or errors (*e.g.* "No missing required attributes" as displayed in Figure 6-8 above), which constitute links to Items or Manufacturer Parts, and that you can correct and audit again.

4. Choose one of the four buttons described below:

   - **Expand All -** This button displays all the subnodes.
   - **Collapse All -** This button reduces all the subnodes.
   - **Copy -** This button copies the audit statuses and pastes them into another file, such as Notepad, Microsoft® Word or Excel enabling you to use it as a work sheet.
   - **Back -** By using this button, you can return to the change.

A Release Audit ensures that the change is ready for release. It performs the following checks:

- Makes sure that all approvers have signed off
- Performs other checks as listed in the audit status instructions earlier in this section

Switching Changes from One Status to Another Status

Changes move through the change control process by moving through the statuses in the workflow status list. Changes make the transition from one status to another status in two ways:

- The change is autopromoted from its current status to the next status in the workflow status list.
- An Agile Advantage user switches the change from one status to another status manually.

For more information about switching a change from the Unassigned status, see "Starting an Unassigned Change Through a Workflow" on page 6-28.

A change is manually switched from one status to another with one of the following:

- The **Next Status** button switches the change from the current status to the next sequential status in the workflow status list. Click this button, and the appropriate dialog box is displayed for the next status.
- The **Signoff** tab allows you to switch the change from the current status to any status allowed by the settings in the workflow. The status need not be the next status in the workflow status list. For example, you might switch a change from a Submit status type to a Hold status type.

Whether you use the **Next Status** button or the **Signoff** tab, you must have the appropriate privileges and user license to switch a change from one status to another status. See your Agile administrator if you have questions about your privileges and licenses.

To move the change to the next status in the workflow, click the **Next Status** button. You can also use the **Signoff** tab to move the change to *any* valid next status.

Autopromoting a Change to the Next Status

To switch a change from the current status to the next status in the workflow:

1. Open the change.
2. Audit the change to ensure that there are no errors that prevent switching to the next status. If any errors are found, fix them. See "Auditing Changes" on page 6-29.
3. Click the **Next Status** button.

   If your company is not licensed for change collaboration, the status switches to the next status in the workflow status list.

   If your company is licensed for change collaboration, the Change Status to *status name* page appears.
4. Fill in the appropriate fields. List any approvers, observers, or others to notify, and include comments if you want.
5. Click **OK** when you finish filling in fields.

Switching a Change to Another Valid Status

To switch a change from the current status to any valid next status:

1. Open the change.
2. Audit the change to ensure that there are no errors that prevent switching to another status. If any errors are found, fix them. See "Auditing Changes" on page 6-29.
3. Click the **Signoff** tab to display a flowchart of the current workflow. The current status is highlighted in a solid color. Valid next statuses are underlined. The default next status is directly to the right of the current status.

   Note The valid next statuses that appear on the Change Status page are determined by workflow property settings and your privileges. To review the entire status list, choose **Actions | View Workflows**. Click **OK** to close the View Workflow page.
4. Select one of the valid next statuses from the chart on the **Signoff** tab, or accept the default next status in the sequence.
5. When the Change Status to *status name* page appears, add the appropriate approvers, observers, and comments.
6. Click **OK**.

The change moves to the selected status, as indicated by the currently highlighted status on the **Signoff** tab.

Demoting a Change

You promote a change by moving it through the sequential list of statuses in the workflow, as described in "Switching a Change to Another Valid Status" on page 6-34. If the workflow allows it, and if you have the appropriate privileges, you can also use the **Signoff** tab to demote a change by moving the change to a previous status in the workflow status list. From that previous status, the change then moves through the workflow again. For an example, see "Returning a Change to the Originator" on page 6-47.

Note If the change has entered the first Released type status, moving the change to a previous status in the workflow status list unreleases the change, and may have undesirable consequences. For more information, see "Releasing Changes" on page 6-53 and the Note in "Unreleasing an Item" on page 17-9.

Agile Administrator settings determine what happens when a change again moves through a status with approvers and observers (Review status type or Released status type) after status demotion. Depending on the Agile Administrator settings, the following rules apply:

- Demotion Approver Signoff SmartRule:
  - **Remove** — any ad hoc approvers and observers added during the first time through the Review type status or Released type status are removed for the second Review type status or Released status cycle.
  - **Retain** — ad hoc approvers and observers added during the first time through the Review status or Released type status are kept on the approvers and observers list for the second Review status cycle.
- Demotion Signoff SmartRule:
  - **Remove** — When the change enters the Review type status or Released type status the second time, all approvals and rejections from the first Review cycle are removed, and the approvers and observers must sign off again. The approvals and rejections from the first Review status cycle are still shown on the **Signoff** tab.

- **Retain** — When the change enters the Review type status or Released type status the second time, all the approvals and rejections from the first Review status cycle are shown in the second Review status cycle. The approvers and observers who have already signed off do not need to sign off again.

Completing the Change Status Page

Whenever you switch a change from one status to another, you must complete the Change Status *status name* page. The Change Status pages for all status types include a **Notify** field and a **Comments** field. The Review status type and Released status type include additional fields for approvers and observers.

By default, you can switch a change to a Submitted type status only if you are the originator, or if you have the appropriate privileges. Typically, the change analyst or component engineer has the appropriate privileges to submit changes.

Notes If the **Change Analyst** field on the Cover Page of the change is left blank, and if the workflow is defined to notify the default change analyst, then when you switch to a Submit type status, the change is submitted to every user on the **Change Analyst** drop-down list.

You must include at least one change analyst in the **Notify** field of the Change Status to *status name* page.

Only the originator and users with the appropriate privileges can submit a change.

You cannot submit a change to a change analyst who does not have Discovery and Read privileges for that change. See "Details About the Discovery and Read Privileges" on page 15-2.

To complete the Change Status page:

1 Select a new status by using either the **Next Status** button (see "Autopromoting a Change to the Next Status" on page 6-34) or the **Signoff** tab (see "Switching a Change to Another Valid Status" on page 6-34).

The Change Status to *status name* page appears.

The **Notify** field may already contain a list of names, as specified in the workflow, or the **Notify** field may be blank. In either case, you can add names to the **Notify** field if you choose to do so.

2 To add names to the **Notify** list, type the names of the users to be notified (with semicolons separating the names).

Or click  to open the address book.

You may select:

- Individual usernames
- Departments (only one member of a department needs to sign off a change)
- Global groups
- Personal groups

Note There is no designated escalation person for a personal group. For information about designated escalation persons, see "Designated Escalation Person" on page 6-44.

3 Add any comments in the **Comments** field.

4 Click **OK**.

By default, you can switch a change to a Submit type status only if you are the originator, or if you have the appropriate privileges. Typically, the change analyst or component engineer has the appropriate privileges to submit changes.

Notes If the **Change Analyst** field on the Cover Page of the change is left blank, and if the workflow is defined to notify the default change analyst, then when you switch to a Submit type status, the change is submitted to every user on the **Change Analyst** drop-down list.

You must include at least one change analyst in the **Notify** field of the Change Status to *status name* page.

Only the originator and users with the appropriate privileges can submit a change.

You cannot submit a change to a change analyst who does not have Discovery and Read privileges for that change. See "Details About the Discovery and Read Privileges" on page 15-2.

Completing the Change Status Page for a Review or Released Status Type

When you switch a change to a Review status type or a Released status type, you are routing it for signoff review to a list of approvers and observers. This list of approvers may also be called the CCB, or Change Control Board.

When the Change Status page appears, workflow property settings may have already assigned a list of users as approvers, observers, and users to notify. If you choose, you may add to this list. If these fields are blank, complete them. When the change is routed, it is attached to an email message and sent to all the approvers, observers, and users to notify. The email message contains an icon representing the change; double-clicking the icon opens the change. Approvers are required to either accept or reject the change. Observers may also accept or reject the change, but their response is not required. Users who are notified are not required to take any action.

Note If you want, you can switch a change to a Released type status without selecting approvers and observers by using the **Next Status** button.

To complete the Change Status to Review or Released page:

1. Select the Review status type or the Released status type by using either the **Next Status** button (see "Autopromoting a Change to the Next Status" on page 6-34) or the **Signoff** tab (see "Switching a Change to Another Valid Status" on page 6-34).

   The Change Status to *status name* page appears.

2. Complete the **Approvers**, **Observers**, and **Notify** fields. These fields may already contain names as defined by the workflow; with appropriate privileges, you may add names. Type the names, separated by semicolons.

   Or click  to open the address book.

   You may select:

   - Individual usernames
   - Departments (only one member of a department needs to sign off a change)
   - Global groups
   - Personal groups

   Note There is no designated escalation person for a personal group. For information about designated escalation persons, see "Designated Escalation Person" on page 6-44.

3. Add any comments in the **Comments** field.

4. If appropriate, check the **Urgent** box. This adds the  icon to the mail message (if users are using Microsoft Outlook).

5. Click **OK**.

The change is routed to all the approvers and observers, and their names are placed on the **Signoff** tab. All users in the **Notify** field receive an email informing them of the new status of the change.

Discovery Privileges of Approvers, Observers, and Users to Notify

If any of the users you select as approvers, observers, or users to notify do not have the appropriate Discovery or Read privileges for the change, an error message appears when you attempt to route or release the change. The error message lists the users that do not have the appropriate privileges and asks if you would like to remove their names from the distribution list.

For more information about Discovery and Read privileges, see "Details About the Discovery and Read Privileges" on page 15-2.

Handling Routed Changes

The following sections describe procedures you perform when routing changes. This information applies to companies licensed to use the change collaboration features.

When to Add Approvers and Observers

Default change analysts (or default component engineers) may want to monitor changes assigned to them to make sure that the list of approvers and observers is complete. When workflows assign approvers and observers according to the attributes of the affected items of a change, you may want to add approvers that were not automatically assigned by the workflow.

For example, at Acme Incorporated, each product line has several projects in development at one time. Acme uses a field to identify which project or projects each item (part or document) belongs to. Workflow Libra Product Line looks at the project assigned to the affected items on an ECO to determine which default approvers and observers to assign.

Mary Green creates ECO 333. She adds six Orion project objects to the **Affected Items** tab: three parts and three documents. Mary finishes preparing ECO 333 and switches it to the next status, where the change is submitted to Bob Smith, the default change analyst.

To select approvers for the Orion project, the Libra Product Line workflow examines each item on the affected items table to determine if the field contains Orion. If *all* the items on the affected items table belong to the Orion project, then the list of Orion approvers, as defined in the workflow, is automatically added to the **Signoff** tab when ECO 333 is submitted to Bob.

However, in the case where some of the objects on the affected items table are documents, Acme requires that Orion team members in the Publications department must also sign off the change. Since not all ECOs include documents to sign off, the Libra Product Line workflow does not automatically add to every ECO approvers from the Publications department.

Bob Smith, the change analyst, examines the ECO 333 and notices that some of the affected items are documents. Bob chooses **Actions | Add Approvers/Observers** on the ECO 333 page and adds all the members of the Orion Publications group as approvers. Bob can add approvers to any future Review or Released type status; the ECO does not need to be in the Review or Released type status to add approvers or observers.

See the following section for detailed instructions for adding approvers and observers.

Adding and Removing Approvers and Observers

After a change has been routed for approval in a Review status type or Released status type, it may be necessary to either add or remove approvers or observers. This requires both of the following:

- The Ad Hoc Approvers/Observers property in the workflow is set to Yes.
- You have the appropriate privilege granted to you by your Agile administrator.

Note You cannot add an approver or observer if that user does not have Discovery and Read privileges for that change. See "Discovery Privileges of Approvers, Observers, and Users to Notify" on page 6-39.

To add an approver or observer:

1. Select and open the change.
2. Choose **Actions | Add Approvers/Observers.**
   The **Add Approvers or Observers** page appears.
3. Select the status you want the additional people to approve.

4 Complete the **Approvers** and **Observers** fields. Type the names of the approvers or observers to add to the list (with semicolons separating the names).

Or click  to open the **Add Approvers or Observers** window.

From the **Available** list, you may select:

- Individual usernames
- Departments (only one member of a department needs to sign off a change)
- Global groups
- Personal groups

Note There is no designated escalation person for a personal group. For information about designated escalation persons, see "Designated Escalation Person" on page 6-44.

5 Add any comments.

6 Click **OK**.

To remove an approver or observer:

1 Select and open the change.

2 Choose **Actions | Remove Approvers/Observers**.
The **Remove Approvers or Observers** page appears.

3 Select the status for which you want to remove approvers and observers.

4 Enter the names of approvers and observers to be removed from the list.
Type the names (with semicolons separating the names).
Or click  to open the **Remove Approvers or Observers** window.

From the **Assigned Approvers** or **Assigned Observers** list, you may select:

- Individual usernames
- Departments (only one member of a department needs to sign off a change)
- Global groups
- Personal groups

Note There is no designated escalation person for a personal group. For information about designated escalation persons, see "Designated Escalation Person" on page 6-44.

5 Enter any comments.

6 Click **OK**.

Note You can remove an approver only if that approver has not yet approved or rejected the change.

Approving Changes

When you approve a change, the Agile Web client shows the approval and any comments on the **Signoff** tab.

When you approve a change, the Agile Web client shows the approval and any comments on the **Signoff** tab. For information about group approvals, see "Groups and Departments as Approvers" below.

To approve a change:

1 Open the change.

2 Click the **Approve** button to open the Approve page.

3 Enter any comments in the **Comments** field.

4 Enter your password in the **Password** field.

5 Click **Approve**.

When all the approvers have approved, the change is ready to move to the next status in the status list.

- If the workflow AutoPromote property is set to Yes, and the required fields are filled in, then the change is automatically promoted to the next status in the status list.
- If the workflow AutoPromote property is set to **No**, then an email message notifies the change analyst or component engineer that all the approvers have approved the change.

Groups and Departments as Approvers

If the approver is a group or department, all the members of the group or department receive email notification. Only one member of the group or department is required to approve or reject the change. When one member has approved or rejected the change, the change is removed from the Inbox of the remaining members or the group or department.

If you need all the members of a global group or personal group to approve a change, when you are prompted, click the **All** button in the Add Group or User dialog box. This adds all the individual members of the group to the **Signoff** tab, rather than the group itself.

Rejecting Changes

When you reject a change, the Agile Web client shows the rejection and any comments on the **Signoff** tab, and sends an email message to the users specified in the workflow properties. Usually, this is the change analyst or component engineer. The email message states that you have rejected the change.

If a change is first rejected but then later approved, the **Signoff** tab shows only the approval and not the rejection. However, the **History** tab shows both actions.

To reject a change:

1. Open the change.
2. Click the **Reject** button to open the Reject page.
3. Enter any comments in the **Comments** field.
4. Enter your password in the **Password** field.
5. Click **Reject**.

When at least one approver has rejected a change, the Agile Advantage system takes several actions as specified in the workflow property settings:

- The users specified in the workflow properties are notified that the change has been rejected.
- If the workflow AutoPromote property is set to Yes, then the change is not promoted to the next status in the status list.
- Depending on the workflow property settings, the change may switch to a specified status when it has been rejected.

Reminder Period and Review Escalation Period

The reminder period and the review escalation period are periods of time defined for each Review or Released type status in each workflow. For example, the reminder period for the CCB status in the Default Change Order workflow is 48 hours, and the review escalation period is 96 hours. The reminder period and the review escalation period begin when the change enters a Review or Released type status. The reminder period is shorter than the escalation period so the approvers have time to respond to the change before it is escalated.

Each Review or Released type status has its own reminder period and review escalation period. If a workflow has several Review or Released type statuses, each one may have a different length of time for both its reminder period and review escalation period.

When the reminder period elapses, if an approver has not approved or rejected a change, a reminder email is sent to the approver. The change analyst or component engineer receives a similar email, which also includes a list of the approvers who received a reminder email.

When the escalation period elapses, if an approver has not approved or rejected a change, an email is sent to the appropriate designated escalation person. The change analyst or component engineer receives a similar email, notifying her that the change has been escalated to the specified designated escalation person. The designated escalation person may approve or reject the change in the place of the original approver.

Designated Escalation Person

Each user, global group, or department may have multiple designated escalation persons. (Personal groups do not have designated escalation persons.) A designated escalation person can be an individual user, a global group, or a department.

Your Agile administrator determines whether your designated escalation persons are able to sign off a change for you at any time, or only after the escalation period has elapsed. See your Agile administrator if you have questions about your designated escalation persons.

If the review escalation period elapses, the approver's designated escalation persons are notified by email that the approver has not responded to the change. Now the designated escalation persons may approve or reject the change in the place of the original approver. If the designated escalation person approves or rejects the change, then her name is recorded on the **Signoff** tab and the **History** tab as the Signoff user.

Note If the designated escalation person is a group or department, only one member of the group or department needs to sign off the change. When the change has been signed off, the change no longer appears in the Inbox of the other members of the group or department.

Transferring Signoff Authority

If you have the appropriate privileges, you can temporarily transfer your change signoff authority to one or more Agile Advantage users. For example, if you know you will be on vacation for a week, you can give other users the authority to sign changes for you while you are gone. You can specify which changes to transfer to which user.

In addition, if you have the appropriate privileges, you can also transfer signoff authority for other users. For example, if Mary will be on vacation, you can give Bob the authority to sign changes for Mary while she is gone.

Note Signoff authority is transferred for users who are assigned approvers on a change. Signoff authority is not transferred for observers.

To transfer signoff authority for yourself or others:

1. Choose **Settings | Transfer Authority**.
   The **Transfer Authority** page appears.
2. Click **Create**.
   The Transfer Authority page appears.
3. Select yourself or another user to transfer authority from, then select the user who is receiving signoff authority.

   Note Users who are receiving the authority must have the appropriate privileges and licenses to sign off the changes transferred to them. If you have questions about privileges or licenses, see your Agile administrator.
4. Choose transfer criteria, a start date, an end date, and the types of changes affected by the transfer. The Agile administrator defines transfer criteria.

5 Click **OK** to complete the transfer.

Modifying Signoff Authority Transfers

With appropriate privileges, you can modify or delete signoff authority transfers at any time. For each authority transfer, you can modify the person who receives signoff authority, the start and end dates, and whether or not to transfer changes already in the Transfer To user's Inbox.

You can also modify and reuse any expired authority transfer at a future date.

Your Transfer Authority privileges determine which authority transfers you can modify:

- If you have privileges to create only your own authority transfers, you can modify only your own authority transfers.
- If you have privileges to create authority transfers for other users, you can modify any authority transfers created by any user.

To modify signoff authority:

1 Choose **Settings | Transfer Authority**.

The Transfer Authority page appears.

2 Select a row to change, then click **Edit**.

The Create Transfer Authority page appears.

3 Change the settings as needed.

Note Users who are receiving the authority must have the appropriate privileges and licenses to sign off the changes transferred to them. If you have questions about privileges or licenses, see your Agile administrator.

4 Click **OK**.

Deleting Signoff Authority Transfers

To delete one or more transfers of signoff authority:

1 Choose **Settings | Transfer Authority**.
The Transfer Authority page appears.

2 Select one or more rows to delete, then click **Delete**.

Returning a Change to the Originator

You return a change to the originator by switching the status to the Pending status type. Before you can switch a change back to the Pending status type, you need the appropriate privileges. Usually, the change analyst and component engineer have these privileges. If you need them and don't have them, see your Agile administrator.

When a change analyst or component engineer switches a change from a workflow status (not from the Unassigned status) to the Pending status type (the first status in the workflow status list), the originator is notified. The originator is now able to edit the change, including editing items on the **Affected Items** tab and selecting a different workflow.

When the originator completes edits to the returned change and then switches it to the next status in the workflow status list, the change moves through the workflow status list and enters the Review type status or Released type status cycle a second time. For details about what happens when the change enters the Review type status or Released type status cycle again, see "Demoting a Change" on page 6-35.

To return a change to the originator:

1. Open the change.
2. On the **Signoff** tab, click Pending (or a status of type Pending) in the chart on the **Signoff** tab.
   When the Change Status to *status name* page appears, complete the **Notify** field and add comments as described in"Completing the Change Status Page" on page 6-36.
3. Click **OK**.
   The status of the change switches to the Pending type status.

   Note Approvals and rejections from previous route cycles appear on the **Signoff** tab, but they are not active. Only approvals and rejections for the latest route cycle on the **Signoff** tab are allowed. The **History** tab also shows the actions of the earlier route cycles.

   You cannot return a change to an originator who does not have Discovery and Read privileges for that change. See "Details About the Discovery and Read Privileges" on page 15-2.

Canceling a Change

You can use the **Signoff** tab to cancel a change by switching the status to the Cancel status type if both of the following are true:

- The Cancel status type has been defined in the workflow as one of the valid next statuses.
- You have the appropriate privileges. See your Agile administrator if you have questions about your privileges.

Note If you cancel a released change order, the revision is removed from the item revision list of the affected items. A change with affected items that has been canceled cannot be uncanceled (moved to a different status in the workflow). The canceled change appears on the Change History table of the item's **Changes** tab. This differs from a change on hold; see "Putting a Change on Hold" on page 6-51.

Canceling a change is not the same as deleting a change. A change can be canceled due to a fundamental flaw or rejection by several approvers, but it remains in the database. See also "Deleting Changes" on page 6-51.

When a change is canceled, it no longer has the current status, and the remaining statuses on the status list are skipped. All the remaining statuses on the status list show the name of the person who moved the change to Canceled under the **Status Changed By** column on the **Signoff** tab.

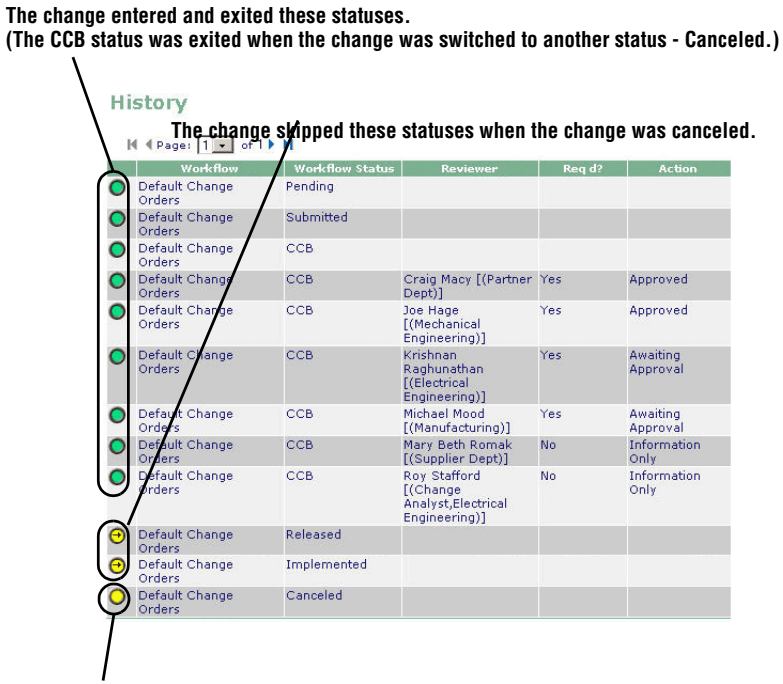
When a change is canceled, the approvers and observers appear on the **Signoff** tab under the abandoned status; however, those users cannot approve the change for that status.

To cancel a change:

1. Open the change.
2. On the **Signoff** tab, click **Cancel** in the chart.

   When the Change Status to *status name* page appears, complete the **Notify** field and add comments, as described in "Completing the Change Status Page" on page 6-36.
3. Click **OK**.
   The status of the change switches to the **Cancel** type status.

Figure 6-10: Signoff Tab of a Canceled Change



Uncanceling a Change

You uncancel a change by using the **Signoff** tab to switch the status. You can switch to any status provided that:

- The status has been defined in the workflow as one of the valid next statuses.
- You have the appropriate privileges. See your Agile administrator if you have questions about your privileges.
- There are no items on the **Affected Items** tab of the change.

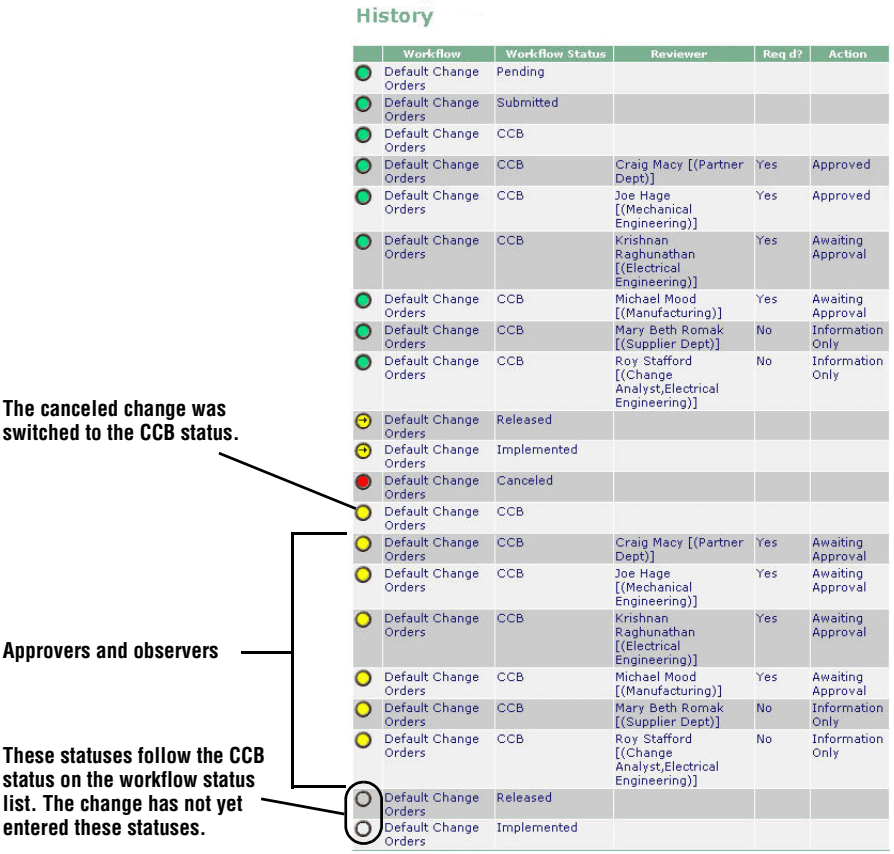
Note If you cancel a released change, the revision is removed from the item revision list of the affected items. A change with affected items that has been canceled cannot be uncanceled (moved to a different status in the workflow). This differs from a change on hold; see also "Putting a Change on Hold" on page 6-51.

To uncancel a change:

1. Open the change.
2. On the **Signoff** tab, select a status in the chart.

   When the Change Status to *status name* page appears, complete the **Notify** field, add approvers and observers if appropriate, and add comments as described in "Completing the Change Status Page" on page 6-36.
3. Click **OK**.
   The status of the change switches to the selected status.

Figure 6-11: Signoff Tab of an Uncanceled Change



Putting a Change on Hold

The process of switching a change to the Hold type status is similar to the process of canceling a change. See "Canceling a Change" on page 6-48 for detailed instructions.

When you put a change on hold, select the Hold type status instead of the Cancel type status.

To take a change off hold, follow the directions described in "Uncanceling a Change" on page 6-49.

Note A change with affected items that has been put on hold can be switched from a Hold type status to another sequential status in the workflow. If you put a released change on hold, the revision remains on the item revision list of the affected items. This is a substantial difference between Cancel and Hold.

For more information about canceling a change, see "Canceling a Change" on page 6-48 and "Uncanceling a Change" on page 6-49.

The change on hold appears in the Pending Changes table on the item's **Changes** tab.

Deleting Changes

You can delete unreleased changes. the Agile Web client supports "soft" deletions only. To perform "hard" deletes, you must use the Agile Windows client.

See "Soft and Hard Object Deletions" on page 1-15 for more information about:

- Soft-deleted objects
- Hard-deleted objects
- Which deleted objects can be undeleted
- Searching for soft-deleted objects

Note If you think you might want to undelete a soft-deleted change in the future, be sure to clear its **Affected Items** tab before you delete it. You can undelete only changes with no entries on the **Affected Items** tab. If you want to keep the record of affected items but still want to delete the change, use the **Save As** command to copy it under another change number before deleting it.

You can delete a change only if you created it, or if you are the change analyst or component engineer and your Agile administrator has given change analysts or component engineers the appropriate privileges to delete a change. Then you can delete a change only if it is at the Pending type status or the Unassigned status. If you want to delete a change that has already been released, you must first unrelease the change. You need the appropriate privileges to unrelease a change by using the **Signoff** tab to switch it to a different status. See "Unreleasing Changes" on page 6-54. See your Agile administrator if you have questions about your privileges.

Notes If you delete a change that has items on the affected items list, you cannot undelete it.

If you do not have Discovery and Read privileges for any items on the affected items list, you cannot delete the change.

Soft-Deleting a Change

To soft-delete an unreleased change:

1. Select and open the change.
2. Choose **Actions | Delete**.
3. Click **Yes** when prompted to confirm that you want to delete the change.

Note Soft-deleted changes are not removed from the Recently Visited folder.

Note You cannot hard-delete objects in Agile advantage 2006 Web Client. To hard-delete an object you can go to the Agile Advantage 2006 Windows Client.

Undeleting Changes

Since soft-deleted changes still exist in the database, you can undelete them if you have the necessary privileges, and if the change has no items on the **Affected Items** tab. See your Agile administrator if you have questions.

To undelete a change:

1. Run the Deleted Changes search in the **Change Analyst Searches** folder.
2. Open the appropriate deleted change from the list.
3. Choose **Actions | Undelete**.

Note If the change was recently visited and deleted, it may still appear in the Recently Visited folder. In this case you can undelete the change by selecting it in the Recently Visited folder and then choosing **Actions | Undelete**.

Releasing Changes

You can release changes by using the **Next Status** button or the **Signoff** tab. See "Switching Changes from One Status to Another Status" on page 6-33.

If the AutoPromote property of the preceding Review type status is set to Yes, the change is automatically released when all the approvers have approved the change.

Before a change can be released, the Agile Web client checks that all the required fields are filled in and that the change passes the release audit. Your Agile administrator determines which fields are required in the workflow property settings.

Note For information about multiple Released type statuses, see "Multiple Released Type Statuses" on page 6-55.

You can use the **Audit Release** command on the **Actions** menu to verify that the change passes the release audit and that all required fields have been completed. For details, including the conditions a release audit checks, see "Auditing Changes" on page 6-29.

To release a change:

1. Open the change.
2. If you want, audit the change.
3. Use the **Signoff** tab to select the Released type status from the workflow status chart. For complete instructions, see "Switching Changes from One Status to Another Status" on page 6-33.
4. Complete the **Notify** field and enter any comments in the **Comments** field.

   See "Completing the Change Status Page" on page 6-36.
5. Click **OK**.

   If not all the required fields have been completed, you are prompted to complete them. Otherwise, the status of the change switches to Released.

Note If you do not have Discovery and Read privileges for an item on the **Affected Items** tab of the change, you cannot release that change.

Unreleasing Changes

You can use the **Signoff** tab to unrelease a change by switching the change from a Released or Complete type status to a Pending, Submit, Review, Cancel, or Hold type status.

You can unrelease a change, provided that:

- The workflow assigned to the change allows you to switch a Released or Complete change to another status type.
- You have the appropriate privileges.
- No other changes have been made and released against the same items.

If other changes have been made and released against the same items, you must first unrelease those later changes. Unrelease those changes in the reverse order in which they were made.

Caution! *Use extreme caution* when unreleasing changes if you are using Agile ChangeCAST. After you have released a change and ChangeCAST has already passed that information to your ERP system, unreleasing the change has no effect on the information in the ERP system. ChangeCAST does not pass information about unreleasing a change to the ERP system.

To unrelease a change:

1. Open the change.
2. On the **Signoff** tab, select a status from the displayed list. Do *not* select a Released or Complete type status. For complete instructions, see "Switching Changes from One Status to Another Status" on page 6-33.

   Note Selecting the Pending type status allows you to edit the unreleased change, including selecting a different workflow.
3. Complete the **Notify** field and enter any comments in the **Comments** field. If appropriate, add approvers and observers.

   See "Completing the Change Status Page" on page 6-36.
4. Click **OK**.

   Notes Unreleasing a change is *not* recommended practice, as it alters release dates.

   If you do not have Discovery and Read privileges for an item on the **Affected Items** tab of the change, you cannot unrelease that change.

Multiple Released Type Statuses

A workflow can have multiple Released type statuses. The change enters the first Released type status, Agile Advantage performs all the release checks (described in "Auditing Changes" on page 6-29), and puts any BOM or manufacturer data redlines into effect in the affected items. The change is now released.

For subsequent Released type statuses, no additional checks or release actions are performed; the change remains released. However, the released change may be routed for additional approval cycles. This allows for individual approval cycles after release but before the change moves to the Complete type status. The change remains released as long as it moves from a Released type status to either another Released type status or to a Complete type status.

Note Moving a change from a Released type status to a Pending, Submit, Review, or Cancel type status unreleases the change.

See Figure 6-7 on page 6-26 for an example of a workflow that requires additional approval cycles after release.

Changing a Change's Subclass

If you have the appropriate privileges, and the change is still in the Pending type status, you can change the subclass of a change. For example, you can change the subclass of a particular change from Engineering Change Order to Engineering Change Notice.

Caution! When you change the subclass of a change, its data fields change, and all previous information about the Page Three section is cleared.

To change the subclass of a change:

1. On the **Cover Page** tab of the change, click **Edit**, and select a new subclass from the **Change Type** drop-down list.
2. If the Page Three section (on the **Cover Page** tab) is visible and has data, a warning message appears, alerting you that all Page Three data is cleared.
   - Click **OK** to continue changing the subclass and to allow Page Three data to be cleared.
   - Click **Cancel** to cancel the change subclass process. No changes are made to the object.

3 If the new subclass has an autonumbering scheme assigned in Agile Administrator, the Agile Web client asks you if you want to select a new autonumber for the new subclass, unless autonumbering is required by your system, in which case you see a different warning message; see step 5.

- Click **Yes** to continue the process of changing the number.
- Click **No** to change the subclass but retain the existing number.
- Click **Cancel** to cancel the change subclass process. No changes are made to the object.

4 If the new subclass does not have an autonumbering scheme assigned in Agile Administrator, the process is completed with the subclass being changed but the number not being changed.

5 If autonumbering is required in your system, and more than one autonumber source is designated for the new subclass, a different warning is displayed.

- Click **Yes** to select a different autonumber source. Go to step 6.
- Click **No** to use the same autonumber source. Go to step 6.
- Click **Cancel** to cancel the change subclass process; no changes are made to the object.

6 The Agile Web client automatically numbers the change and displays the new number in the **Number** field, and the Agile Web client enters the event on the **History** tab of the change.

Note When you click the **AutoNumber** button 123, the number changes automatically. The currently selected autonumber scheme is used, or you are prompted to select one (if multiple schemes have been designated).

After a Change is Released

Releasing a change affects the appearance and behavior of the change's tabs, as well as the BOM of any items affected by the change that were included on the affected items list of that change.

On the **Cover Page** tab of the change:

- ❑ The stamp reflects the new status.
- ❑ The **Status** field reads Released.

On the **Affected Items** tab, the **Add** and **Delete** buttons are disabled.

Note If the workflow has more than one Released type status, the appearance and behavior of the change are altered only when the change enters the first Released type status. For more information, see "Multiple Released Type Statuses" on page 6-55.

Switching Changes to Their Final Status

A change's workflow defines its final status. If the workflow has a status of type Complete, it is always the last status in the status list, before any Hold or Cancel type statuses.

This section contains the following topics:

- Switching to Final Status with a License for Change Collaboration
- Switching to Final Status without a License for Change Collaboration

Note Depending on the assigned workflow, a change may not have a Complete type status. A Complete type status is not required in a workflow. To examine the status lists of the workflows in use at your company, choose **Actions | View Workflows**.

If the Released type status is set to autopromote and it immediately precedes the Complete type status, the change automatically switches to the Complete type status when all the required fields for the Released type status are filled in and any approvers have approved the change.

You must have the appropriate privileges and user license to switch a change to its Complete type status. See your Agile administrator if you have questions about your privileges and license types.

After a change has been switched to its final status, you cannot delete it unless you unrelease it first. See "Deleting Changes" on page 6-51.

Switching to Final Status with a License for Change Collaboration

To switch a change to its final status when your company is licensed for change collaboration:

1. Select and open the change.
2. If you want, audit the change. See "Auditing Changes" on page 6-29.

3 Select the Complete type status by using either the **Next Status** button (see "Autopromoting a Change to the Next Status" on page 6-34) or the **Signoff** tab. See "Switching a Change to Another Valid Status" on page 6-34.

The Change Status to *Complete type status name* page appears.

4 Complete the **Notify** field.

5 Enter any comments in the **Comments** field.

See "Completing the Change Status Page" on page 6-36.

6 Click **OK**.

The change is switched to its final status.

Switching to Final Status without a License for Change Collaboration

To switch a change to its final status when your company is not licensed for change collaboration:

1 Select and open the change.

2 If you want, audit the change. See "Auditing Changes" on page 6-29.

3 Select the Complete type status by using either the **Next Status** button, see "Autopromoting a Change to the Next Status" on page 6-34; or the **Signoff** tab, see "Switching a Change to Another Valid Status" on page 6-34.

4 If appropriate, click **OK**.

The change is switched to its final status.

Printing Change Tabs

The Agile Web client allows you to print one or all tabs of a change.

For more information, see "Printing Objects" on page 2-13.

Redlining ECOs and MCOs

Only ECOs and MCOs have redlining functions. Use these changes when you need to modify a released item.

This section contains the following topics:

- Redlining through ECOs

- Redlining through MCOs

  Note The MCO (manufacturer change order) is available to all users of the Agile Web client. However, users at companies licensed to use the Manufacturer Management module can perform additional functions with the MCO and ECO, which are not described here. For information about the enhanced features of changes with a license for Manufacturer Management features, see "Redlining through MCOs" below.

Redlining through ECOs

ECO changes let you release new items and modify previously released items. When you create an ECO, a preliminary revision is created for any items modified by the change (the ones listed on the **Affected Items** tab). When the ECO is released, the preliminary revision is converted to a released revision for each modified item.

Note Both ECOs and MCOs can be used to redline manufacturing data, but only ECOs can redline BOMs. Since MCOs don't roll revs, they can be used to redline manufacturing data without rolling the rev, and ECOs can be used to redline manufacturing data when rolling the rev is appropriate. Depending on your company policy, when you redline manufacturing data, use an ECO when you want to advance the rev of an item, or use an MCO when you *don't* want to advance the rev of an item.

For information about redlining a BOM, see "Redlining the BOM of a Released Item" on page 8-14.

For information about redlining attachments, see "Redlining Attachments in the Agile Viewer" on page 10-15.

Redlining through MCOs

An MCO is similar in appearance and function to an ECO. However, an MCO does not change the rev of an item, unlike an ECO. Instead, the MCO number is displayed alongside the corresponding rev number in the **Rev** drop-down list. For example, if there is a pending MCO #M12345 against Rev B of an item, then, on the **Rev** drop-down list, that revision is listed as (B) M12345.

Working with the MCO with a Supplier Management Module

Although all the Agile Web client users may have access to the MCO, the Supplier Management module enhances its powers. Agile users can use an MCO to:

- Release a new item without a revision (but you can select its lifecycle status)
- Change the lifecycle phase of an item without changing its rev
- Add, change, or delete manufacturers data on items (**Manufacturers** tab)
- Redline manufacturers data on items (**Manufacturers** tab)

For information about adding attachments to an MCO revision of an item, see "File Operations on MCO Revisions" on page 10-6.

Note Unlike ECOs, MCOs cannot be used to redline BOMs or attachments. You can use both ECOs and MCOs to redline manufacturer parts; however, you can use MCOs to do so without advancing the revision of the affected items. See Chapter 9, "Affected Items of Changes."



CHAPTER 7

Agile Quality Management

This chapter provides an overview of Agile Quality Management features and processes. It has the following sections:

- *What is Agile Quality Management?*
- *Supporting the 8D Problem Solving Process*
- *Objects and Classes*
- *Quality Management Roles*
- *Quality Management Process*
- *Quality Management Searches*
- *Quality Management Tabs and Fields on Agile Objects*
- *Working with Customers*
- *Working with Product Service Requests*
- *Working with CARs*

What is Agile Quality Management?

Agile Quality Management comprises a comprehensive set of modules that allows corporations to track and manage quality data across the enterprise. This includes customer complaints, product and manufacturing defects, field failures, and enhancement and corrective action requests. Agile Advantage closes the support loop by unifying the company's organizations in customer service, field sales, manufacturing, and engineering, and by tightly linking the organization to its customers and partners.

As competition increases, customers are demanding quality products on time and at a lower cost while the product lifecycle decreases. Here are the benefits that the Product Quality and Customer Response features offer to improve your organization's operations and save time and money:

- Integration with external enterprise (CRM, or Customer Relationship Management) systems — the ability to import customer complaints, manufacturing issues, and additional quality-related information from other enterprise applications streamlines the quality tracking process and offers a central repository for tracking product quality data.
- Improved product quality — tracking defects, finding trends, and determining the root cause of defects in a timely manner are the keys to effective defect reduction and improved product quality.
- Improved customer satisfaction — the ability to track problem reports and customer complaints enables you to respond quickly to customers with the status of resolution.
- Lower production, repair costs, and warranty costs — tracking and correcting defects can help reduce scrap, cycle time, and costs associated with rework and repair.
- Features enable compliance with ISO-9000, FDA, and other regulations.

Note Your organization's license must include use of the Agile Quality Management product to access the options described in this manual.

Supporting the 8D Problem Solving Process

Agile Quality Management supports the 8D Problem Solving Process to identify, correct and eliminate the recurrence of quality problems.

8D (eight disciplines) is a problem-solving methodology for product and process improvement. It is structured into eight disciplines, emphasizing team synergy. The team as whole is better and smarter than the quality sum of the individuals. Each discipline is supported by a checklist of assessment questions, such as "what is wrong with what", "what, when, where, how much".

1. Use Team Approach

Establish a small group of people with the knowledge, time, authority and skill to solve the problem and implement corrective actions. The group must select a team leader.

2. Describe the Problem

Describe the problem in measurable terms. Specify the internal or external customer problem by describing it in specific terms.

3. Implement and Verify Short-Term Corrective Actions

Define and implement those intermediate actions that will protect the customer from the problem until permanent corrective action is implemented. Verify with data the effectiveness of these actions.

4. Define end Verify Root Causes

Identify all potential causes which could explain why the problem occurred. Test each potential cause against the problem description and data. Identify alternative corrective actions to eliminate root cause.

5. Verify Corrective Actions

Confirm that the selected corrective actions will resolve the problem for the customer and will not cause undesirable side effects. Define other actions, if necessary, based on potential severity of problem.

6. Implement Permanent Corrective Actions

Define and implement the permanent corrective actions needed. Choose on-going controls to insure the root cause is eliminated. Once in production, monitor the long-term effects and implement additional controls as necessary.

7. Prevent Recurrences

Modify specifications, update training, review work flow, improve practices and procedures to prevent recurrence of this and all similar problems.

8. Congratulate The Team

Recognize the collective efforts of your team. Publicize your achievement. Share your knowledge and learning.

Objects and Classes

Agile includes four quality management objects that correspond to four Agile classes:

Customer — Stores information about the customer and related product service requests. Customer objects are in the new Customers class.

Problem report — A basic description of a problem or an incident that occurred, from the customer's perspective. Problem reports can be routed for investigation. Problem report objects are in the new Problem Reports class.

Issue — A description of a defect. Issues describe the problem from an engineering perspective. Issues can be used to consolidate several problem reports. Issues can be routed for review. Issues are in the new Issues class.

Note Problem reports and issues are in a superclass (or category) called Product Service Request (PSR).

Corrective action request (CAR) — A type of change that addresses defects that surface from issues and problem reports. CAR is the default user-defined subclass in the new Quality Change Request (QCR) class, which is in the Change superclass.

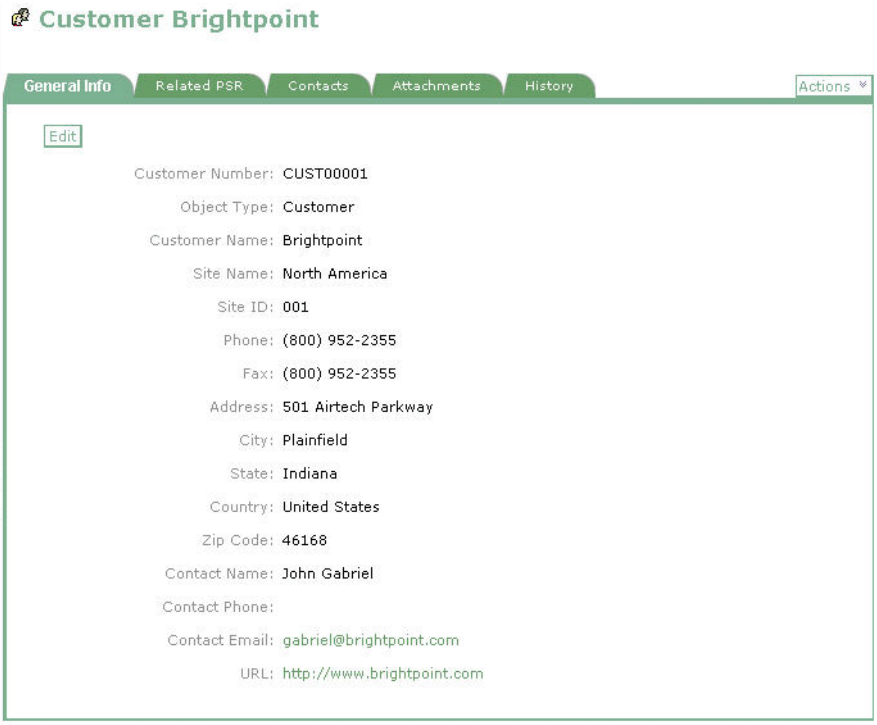
These objects are discussed in more detail in the sections that follow.

Customers

You use customer objects to store information about your customers. If your Agile Advantage system includes customers, you can link customers to problem reports. You can contact an Agile Certified Partner to obtain integration solutions between Agile Advantage PLM and enterprise CRM systems.

The following figure shows an example of a customer.

Figure 7-1: Customer in Agile Advantage



Customer objects are similar to manufacturer objects.

Fields on the Customer General Info Tab

The following table lists and describes the fields on the Customer General Info tab.

Table 7-1: Customer General Info tab fields

Field	Completed...	Contains...
Customer Name	Manually. (Required)	The name of the customer. This name applies to all of its sites.
Customer Number	When created, type number or use **AutoNumber** button. (Required)	The number assigned to the customer when you create it. May be an autonumber. This number applies to all sites.
Site Name	Manually. (Required)	The customer's physical location, site, or subsidiary. Each customer name and number combination can have many sites.
Site ID	Manually. (Required)	The number or reference code for the site.
Object Type	Usually automatically, when created (with the default set by the Agile administrator).	Drop-down list of customer object subclasses.
Address	Manually.	The mailing address of the customer site. (Optional)
City		
State		
Country		
Zip Code		
URL	Manually.	Customer Web site URL.
Phone	Manually.	Customer's main phone number.
Fax	Manually.	Customer's main FAX number.
Contact Name	Manually.	Name, email address, and phone number of the primary contact person at the customer site. (Optional)
Contact Email Address		
Contact Phone		

Customer and Site Identifiers

A customer can have many sites. The **Customer Number** and **Site ID** fields comprise the unique identifier for the customer.

There is a one-to-one relationship between the **Customer Name** and **Customer Number** fields. For example, CUST00001 is always KST Systems, and KST Systems is always CUST00001.

The **Site Name** and **Site ID** fields comprise the unique identifier for each site of a given customer. There is a one-to-one relationship between these two fields *for each customer*. For example, for customer KST Systems, the Ben Lomond site is always Site 1, and Site 1 of KST Systems is always Ben Lomond. Site name can be a location name or a subsidiary name.

Note You can create a customer object with blank **Site ID** and **Site Name** fields. However, each unique customer name and number combination is allowed only one customer object without a site ID and site name.

Related PSR Tab

The Related PSR tab of a customer lists the PSRs (problem reports and issues) that reference the customer. This tab is filled in automatically and is read-only. The following sections discuss problem reports and issues.

Contacts Tab

The Contacts tab of a customer lists the Contact names and information of people at the customer organization. This tab is filled in by clicking the **Add** button to list all Contacts that are in the system address book.

Problem Reports

A problem report contains a basic description of a problem or an incident that occurred.

The following figure shows a problem report. This section includes descriptions of the **Failure Mode** and **Disposition** fields.

Figure 7-2: Problem Report in Agile



A problem report may cite a cause of the problem from the customer's perspective, but this cause is not necessarily the actual cause of the problem. For example, a problem report might state that the CD drive does not stay locked into the computer case, and it might state that the cause of this problem is a malfunctioning lock. The actual cause may be something other than the lock, but this won't be known until your organization investigates the problem report.

Problem reports can be routed for investigation. The investigating team determines the root cause of the problem. The team also decides whether to escalate the problem into an issue or whether to consolidate multiple problem reports on one issue. The user with the Quality Analyst role oversees the processing of problem reports.

You can use Agile Import or the Agile SDK to import problem reports from CRM systems.

Fields on the PSR Cover Page

The following table lists and describes the fields on the PSR Cover Page tab.

Table 7-2: PSR Cover Page tab fields

Field	Completed...	Contains...
Number	Automatically, when created.	The number assigned to the PSR when you create it.
Problem Report Type (problem report object only)	Automatically, when created.	The type (subclass) selected when you create the problem report.
Issue Type (issue object only)	Automatically, when created.	The type (subclass) selected when you create the issue.
Category	Usually automatically, when created.	Drop-down list of categories defined by the Agile administrator.
Quality Analyst	May be provided automatically by the workflow; otherwise selected manually from a drop-down list. Departments appear first in the list, followed by individual user names.	The default quality analyst. If the workflow is defined to notify the default quality analyst, the department or user in this field receives notifications about the PSR. If this field is left blank, then the notifications are sent to every quality analyst on the list. If the notification definition in the workflow is blank, no notifications are sent.
Failure Mode	Manually.	Drop-down list of failure modes defined by the Agile administrator; the way in which a product failed or did not meet customer requirements. Failure mode is a property of the item subclass.
Disposition	Manually.	Drop-down list of dispositions defined by the Agile administrator; the way this PSR is resolved.

Field	Completed...	Contains...
Originator	Usually automatically, when created (with the default set by the Agile administrator).	The user who created the PSR (can be selected from a drop-down list).
Customer Name	Manually. Type the customer name or click  to use Quick Search.	The customer associated with this PSR.
Site Name	Manually. Type the site name or click  to use Quick Search.	The customer site associated with this PSR.
Date Released	Automatically, when released	The date the PSR was released.
Status	Automatically, when created; updated as the PSR moves through the assigned workflow.	Workflow status; described in Chapter 6, "Changes." If no workflow has been selected, this field is Unassigned.
Description	Usually manually; can contain a default.	Maximum number of bytes is set by the Agile administrator; can be up to 1023 bytes, including spaces and carriage returns (which count as two bytes).
Product Lines	Usually manually; can contain a default.	Drop-down list of product lines defined by the Agile administrator.
Date Originated	Usually automatically, when created.	The date the PSR was created.
Workflow	If more than one workflow applies to the PSR, the workflow is selected manually; the workflow selection can be changed as long as the PSR is in the Pending type status. Selecting the blank field in the Workflow drop-down list switches the PSR to the Unassigned status. If only one workflow applies to the PSR, this field is filled in automatically when the PSR is moved to the next status from the Unassigned status.	The name of the workflow being used to move this PSR through the quality tracking process.

Customers and Items on Problem Reports

You can associate a problem report with a customer name and customer site (one customer per problem report). You can also associate a problem report with one or more revisions of an item (part or document—one item per problem report). Neither of these fields are required.

Failure Mode

The **Failure Mode** field displays the way in which a product failed or did not meet customer requirements. You select the failure mode from a list defined by the Agile administrator. Lists of failure modes can be defined for each subclass of an item. For example, a failure mode for a battery might be No Charge, and a failure mode for a power strip might be Blown Fuse.

The **Failure Mode** list is dependent on the item specified in the **Item Number** field. You must fill in the **Item Number** field first to access the corresponding **Failure Mode** list.

Information about failure modes can be used in data analysis.

For information about defining failure modes in Agile Administrator, see the *Agile Administrator 2006 User Guide*.

Disposition

The **Disposition** field displays a code that represents the way in which a problem report or issue is being resolved. Examples of dispositions are Replace Component and Rework to Spec. The list of dispositions is defined by the Agile administrator.

Related Issues, QCRs, and ECOs

The problem report's **Cover Page** tab has fields that list the issues, QCRs (such as CARs), and ECOs that reference the problem report.

When a problem report is associated with an issue, the **Issue Number** field shows the number of the associated issue. This field is filled in automatically.

If the problem report (or an associated issue) is associated to a CAR, the **QCR Number** field shows the number of the associated CAR. This field is filled in automatically.

If the problem report includes a related CAR and ECO, as the problem becomes resolved, the **QCR Number**, **ECO Number**, and **Rev Fixed** fields are updated by the latest released ECO containing the referenced item.

Note For a standalone problem report that is not related to an ECO through a CAR, if the problem is fixed with the release of an ECO, you can manually update the **Rev Fixed** field in the problem report. When you do so, the **ECO Number** field is filled in automatically.

Issues

An issue describes a defect or issue with a part, document, or process. Issues can be used to consolidate several problem reports.

The following figure shows an issue. For information about the **Failure Mode** field, see "Failure Mode" on page 7-11. For information about the **Disposition** field, see "Disposition" on page 7-11.

Figure 7-3: Issue in Agile



Whereas a problem report describes a problem from the customer's perspective, an issue can describe a defect from an engineering perspective.

Issues can be used in two ways:

- An issue can include one or more problem reports. For example, there may be five similar problem reports from five different customers. Rather than deal with each one separately, you can choose to put them together in one issue..
- An issue can be created without an associated problem report. For example, if a product defect surfaces, and the root cause is known, you may see no need for a problem report. This type of issue *can* be associated with an item (one item per issue).

You can associate an issue with a customer name and customer site (one customer per issue). This is not required.

Issues can be routed for review. Typically, the review is used for additional information gathering rather than approval and rejection. During this process, the team assesses whether a CAR is needed. The user with the Quality Analyst role oversees the processing of issues.

Related PSR Tab

The **Related PSR** tab of an issue is where you can list the problem reports associated with this issue.

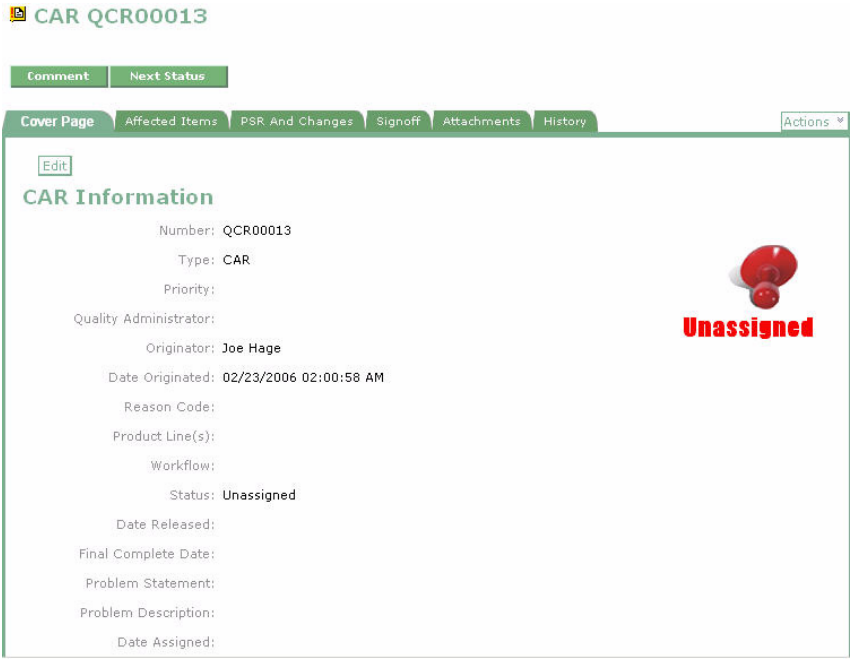
If you add problem reports to the **Related PSR** tab, you cannot fill in the **Item Number** field on the issue. Likewise, if you fill in the **Item Number** field on an issue, you cannot add problem reports to the **Related PSR** tab.

Corrective Action Requests

A Corrective Action Request (CAR) is a type of change that addresses product quality defects. Typically, the defects addressed by CARs originally surfaced from problem reports and issues. CARs are processed through a workflow in order to establish recommendations for corrective actions required.

The following figure shows a CAR.

Figure 7-4: CAR in Agile



By the time a problem reaches the CAR stage, the team has figured out which specific items must be fixed (the affected items) and the root cause of failure.

CARs are routed for approval and have a default workflow. The user with the Quality Administrator role oversees the processing of CARs.

Fields on the CAR Cover Page

The following table lists and describes the fields on the CAR Cover Page tab.

Table 7-3: CAR Cover Page tab fields

Field	Completed...	Contains...
Number	Automatically, when created.	The number assigned to the CAR when you create it.
Type	Automatically, when created.	The type (subclass) selected when you create the CAR.
Change Category	Usually automatically, when created.	Drop-down list of categories defined by the Agile administrator.
Quality Administrator	May be provided automatically by the workflow; otherwise selected manually from a drop-down list. Departments appear first in the list, followed by individual user names.	The default quality administrator. If the workflow is defined to notify the default quality administrator, the department or user in this field receives notifications about the CAR. If this field is left blank, then the notifications are sent to every quality administrator on the list. If the notification definition in the workflow is blank, no notifications are sent.
Date Originated	Usually automatically, when created.	The date the CAR was created.
Reason Code	Usually automatically, when created (with the default set by the Agile administrator).	Drop-down list of reason codes that describe why the CAR was created.
Originator	Usually automatically, when created (with the default set by the Agile administrator).	The user who created the CAR (can be selected from a drop-down list).
Status	Automatically, when created; updated as the CAR moves through the assigned workflow.	Workflow status, described in Chapter 6, "Changes." If no workflow has been selected, this field is Unassigned.
Date Assigned	Automatically, when the CAR is moved into the Submitted type status.	Date and time the CAR was submitted to the quality administrator.
Final Completion Date	Automatically, when the CAR enters the Complete type status.	The date the CAR moved into the Complete type status.

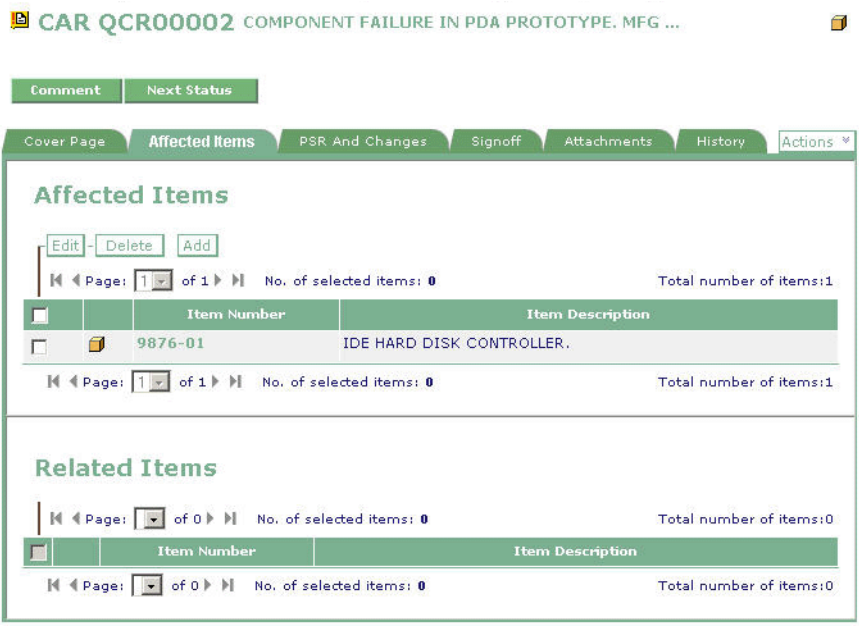
Field	Completed...	Contains...
Description	Usually manually; can contain a default.	Maximum number of bytes is set by the Agile administrator; can be up to 1023 bytes, including spaces and carriage returns (which count as two bytes).
Reason for Change	Usually manually; can contain a default.	Maximum number of bytes is set by the Agile administrator; can be up to 1023 bytes, including spaces and carriage returns (which count as two bytes).
Product Lines	Usually manually; can contain a default.	Drop-down list of product lines defined by the Agile administrator.
Workflow	If more than one workflow applies to the CAR, the workflow is selected manually; the workflow selection can be changed as long as the CAR is in the Pending type status. Selecting the blank field in the workflow drop-down list switches the CAR to the Unassigned status. If only one workflow applies to the CAR, this field is filled in automatically when the CAR is moved to the next status from the Unassigned status.	The name of the workflow used to move this CAR thought the quality control process.
Date Released	Automatically, when released.	The date the CAR was released.

Affected Items Tab of a CAR

The **Affected Items** tab of a CAR has two tables. The Affected Items table lists the items that are affected by the CAR. If you have the appropriate privileges, you can modify this table. The Related Items table lists the items that are referenced by problem reports and issues associated with the CAR. This table is filled in automatically and is read-only.

The following figure shows the **Affected Items** tab of a CAR.

Figure 7-5: Affected Items Tab of a CAR

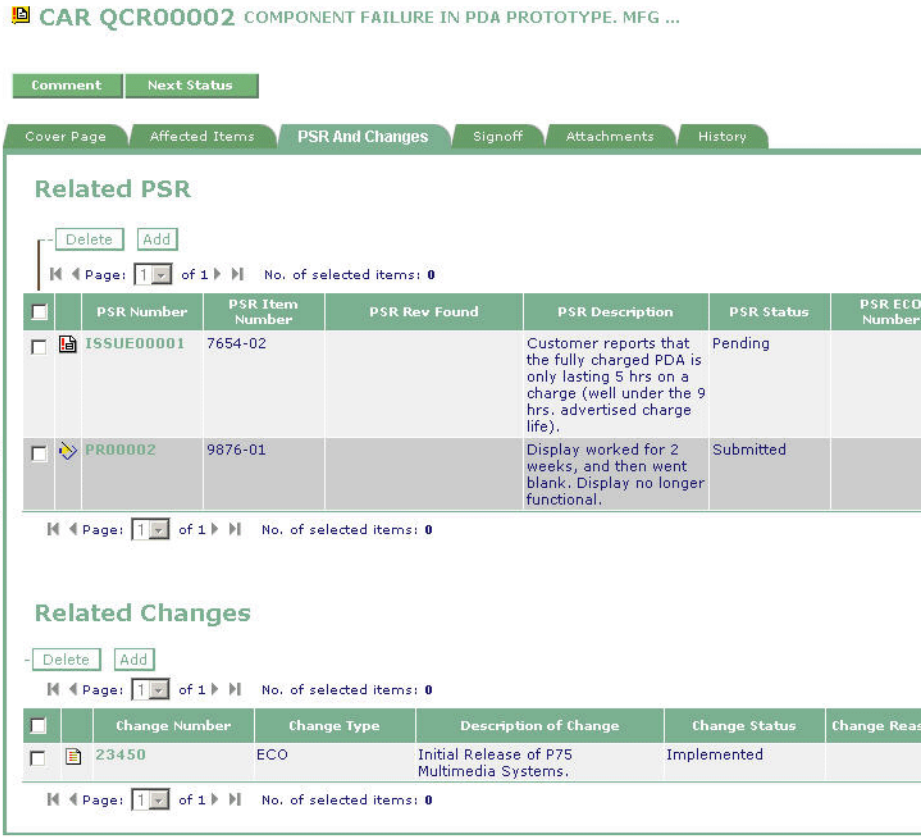


PSR And Changes Tab of a CAR

The **PSR And Changes** tab of a CAR lists the issues, problem reports, and ECOs associated with this CAR. You can add PSRs and ECOs to the tables.

Note Each PSR can be listed on only one CAR. When you search for PSRs to add to a CAR, a **QCR Number** column in the search results table shows you whether the PSR is already listed on a CAR.

Figure 7-6: PSR And Changes Tab



Process CARs

CARs can be created without being preceded by problem reports or issues. In this case, the CAR might be a "process CAR," used when you need to document and maintain certain processes. Choose between these two methods to work with process CARs:

- To put a document under version control, create a document object and add the file to the **Attachments** tab of the document. Add this document to the CAR's **Affected Items** tab.
- If you don't need version control, or simply want to route a file for review, create a CAR, and add the file to the CAR's **Attachments** tab.

Quality Management Roles

Users with the roles Quality Analyst and Quality Administrator oversee the routing and review of PSRs and CARs, just as a Change Analyst oversees the routing of ECOs and other changes. By default, when you create a PSR, you fill in the **Quality Analyst** field with the appropriate name from the drop-down list. When you create a CAR, you fill in the **Quality Administrator** field with the appropriate name from the drop-down list. Your Agile administrator may have set up your system differently.

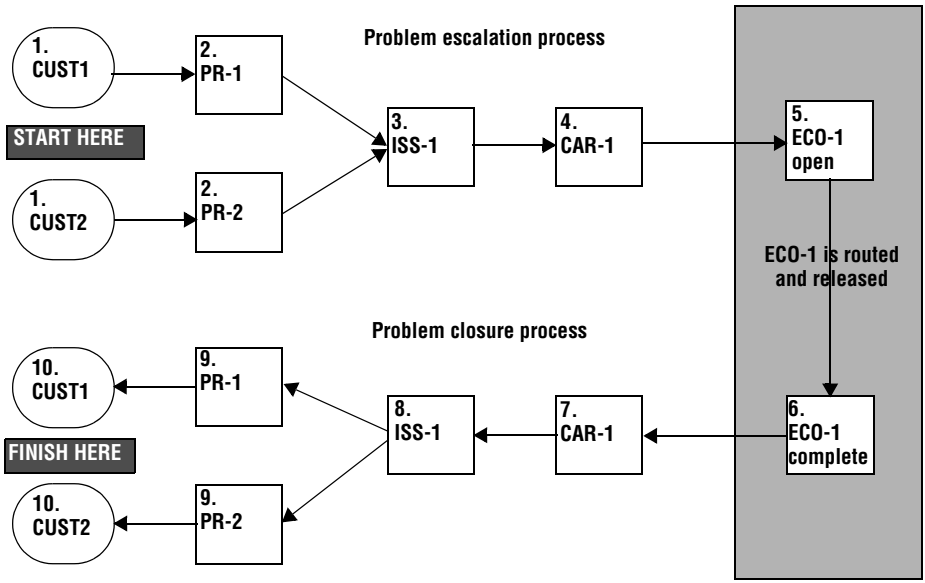
For details about these roles, see the *Agile Administrator 2006 User Guide*.

Quality Management Process

The Agile Quality Management modules are flexible. You can adapt them to fit your business processes. The following diagram illustrates one example of what happens when a customer reports a problem. Following the diagram is a description of each numbered step.

The 8D Problem Solving Process is supported to identify, correct and eliminate the recurrence of quality problems. For more information, refer to "Supporting the 8D Problem Solving Process" on page 7-2.

Figure 7-7: Basic example of a corrective action process



The steps outlined in the preceding figure are explained below:

1. Two customers—CUST1 and CUST2—report incidents.
2. The support representative creates two problem reports for the reported incidents: PR-1 for CUST1 and PR-2 for CUST2. The problem reports are submitted to the quality analyst, who then assigns them to an engineer.
3. The engineer reviews the problem reports. The two incidents appear to be related, so the engineer creates one issue (ISS-1) to combine both problem reports. The engineer still needs more details and submits the issue to the quality analyst, who then routes it to collect information. Once the issue includes all the required information, the quality analyst alerts the quality administrator, who oversees the corrective action process.
4. The quality administrator creates a corrective action request, CAR-1. The CAR includes a list of the items that it affects. The CAR is routed, and engineering team determines that the request is valid and merits an ECO.
5. An ECO is created to address the problem. The change analyst routes the ECO through the workflow.
6. The ECO is eventually implemented, fixing the original problem. The change analyst sends notification to the quality administrator, who then decides whether the ECO did indeed address the problem documented in the CAR.
7. The quality administrator takes action to close the CAR.
8. The issues are automatically closed. This happens if SmartRules are set up so that closure of a CAR leads to automatic closure of the associated PSRs.
9. The problem reports are automatically closed. Again, this happens if SmartRules are set up so that closure of a CAR leads to automatic closure of the associated PSRs.
10. The quality analyst sends notification of problem resolution to CUST1 and CUST2.

The process outlined above is just an example. The flexibility of the Agile Quality Management also allows issues to be created without any associated problem reports, and CARs to be created without problem reports or issues. Additionally, multiple issues may lead to one CAR (but a single issue can lead to only one CAR); and a CAR may lead to multiple ECOs, or multiple CARs may lead to one ECO.

Quality Management Searches

Sample quality tracking searches are listed below; for details about each search, see Chapter 16, "Sample Searches and Search Tips."

- **Quality-Related Public Inbox Searches**
  - Problem Reports Assigned to me
  - Issues Assigned to me
  - CARs Assigned to me
- **Quality Analyst Searches**
  - Deleted PRs
  - Deleted Issues
  - All Unassigned PRs
  - All Unassigned Issues
  - Open Problem Reports
  - Open Issues
- **Quality Administrator Searches**
  - Deleted CARs
  - All Open CARs
  - All Closed CARs
  - All Released CARs
  - Deleted Customers

Quality Management Tabs and Fields on Agile Objects

The following tabs and fields ensure that quality information is linked to other Agile information:

- The **Quality** tab of an item (part or document) lists the problem reports and issues that reference this item. This tab is filled in automatically.

  Note If an item appears on the **Affected Items** tab of a CAR, then the CAR number appears on the item's **Changes** tab.

If an item is associated with a PSR, and that PSR is associated with a CAR (the PSR includes the CAR number on the Cover Page), then the CAR number appears on the item's **Quality** tab. A CAR number appears in the **Quality** tab only if the affected items of that CAR don't include the current item.

If both of the conditions above are true (the item appears on the CAR's **Affected Items** tab and it appears on the Cover Page of a PSR associated with the same CAR), then the CAR number appears on both the item's **Changes** tab and **Quality** tab.

- The **Related QCR** (quality change request) tab of an ECO lists CARs that have the ECO listed on their **PSR And Changes** tab.
- A column on the **BOM** tab displays an icon  for items referenced by PSRs that are not closed.
- A column in the search results table displays an icon  for items referenced by open PSRs.

Working with Customers

Customer objects store contact information about your customers. For more information, see "Customers" on page 7-4.

This section covers working with customer objects. It includes the following topics:

- Creating a Customer
- Editing a Customer
- Deleting a Customer

Creating a Customer

You must have the necessary privileges to create a customer object. A customer object is created the same way other Agile objects are created. You can create a customer from the **Create** menu in Agile's Web client.

You can also create a customer using the **Save As** command on the **Actions** menu.

To create a customer from the Create menu:

1. Choose **Create | Customer**.
2. On the Create New Customer page, select a subclass from the list (Customer, by default).

3 Type the number of the proposed customer in the **Number** field.

Or click the **AutoNumber** button  to automatically enter the number. This provides a list of autonumber choices if multiple autonumber sources are available. The AutoNumber format and sequence are determined by your Agile administrator. Your Agile administrator also determines whether using AutoNumbers is required or optional.

If you are adding a new site to an existing customer, you can click  and select the number from the list. If you do this, **Customer Name** is filled in automatically.

4 Type the name of the customer in the **Customer Name** field.

If you are adding a new site to an existing customer, you can click  and select the customer from the list. If you do this, the **Customer Number** field is also filled in with the corresponding customer number.

If you selected an existing number in the preceding step, **Customer Name** is filled in automatically.

5 Type the site id for the customer in the **Customer Site ID** field. To see a list of existing site IDs, click  . For information about sites, see "Customer and Site Identifiers" on page 7-6.

Note If you select a site ID or name after clicking  , the corresponding site name (if you selected an ID) or site ID (if you selected a name) will be entered in the appropriate field. Note, however, that you cannot create a customer object that has the same customer and site information as an existing customer object.

6 Type the name of the customer site in the **Customer Site Name** field. To see a list of existing site names, click  . See the preceding Note for more details.

7 Click **Next**.

Agile creates the customer and displays the Enter General Info Tab Data page.

Note You can create a customer object with blank **Site ID** and **Site Name** fields. However, each customer name is allowed only one customer object without a site ID and site name. The customer name and site ID combination define a unique customer object. It is recommended that you fill out all four fields to complete the customer object: **Customer Name**, **Customer Number**, **Site Name**, and **Site ID**.

8 Complete any appropriate fields on this page, and click **Next**.

Or, if you have no other information to add to the customer, you can click **Finish** to save the customer and display it in the right pane.

9 If you clicked **Next**, add all appropriate files and URLs on the Add Attachments page.

10 Finally, click **Finish** to complete the customer.

To create a customer using the Save As feature:

1 In an open customer page, choose **Actions | Save As**.

The Save Customer As page appears. Agile automatically fills in the **Sub Type**, **Number**, and **Customer Name** fields as they appear in the original customer object.

Note To create a new site for this customer, make no changes to the **Sub Type**, **Number**, and **Customer Name** fields. Enter a new site name and site ID, and click **OK**.

2 If appropriate, select a customer type from the **Sub Type** list.

3 In the **Number** field, type a number or click the **AutoNumber** button  to automatically enter the number. You can also click  to select from a list of existing customer numbers; if you select one, the corresponding customer name is filled in.

Complete the remaining fields.

4 Click **Save As**.

Agile creates the customer.

Note You can create a customer object with blank **Site ID** and **Site Name** fields. However, each customer name is allowed only one customer object without a site ID and site name. The customer name and site ID combination define a unique customer object. It is recommended that you fill out all four fields to complete the customer object: **Customer Name**, **Customer Number**, **Site Name**, and **Site ID**.

Editing a Customer

Customers are not under change control. With the necessary privileges, you can edit a customer at any time. You can edit information on the **General Info** and **Attachments** tabs of a customer.

To edit the General Info tab of a customer:

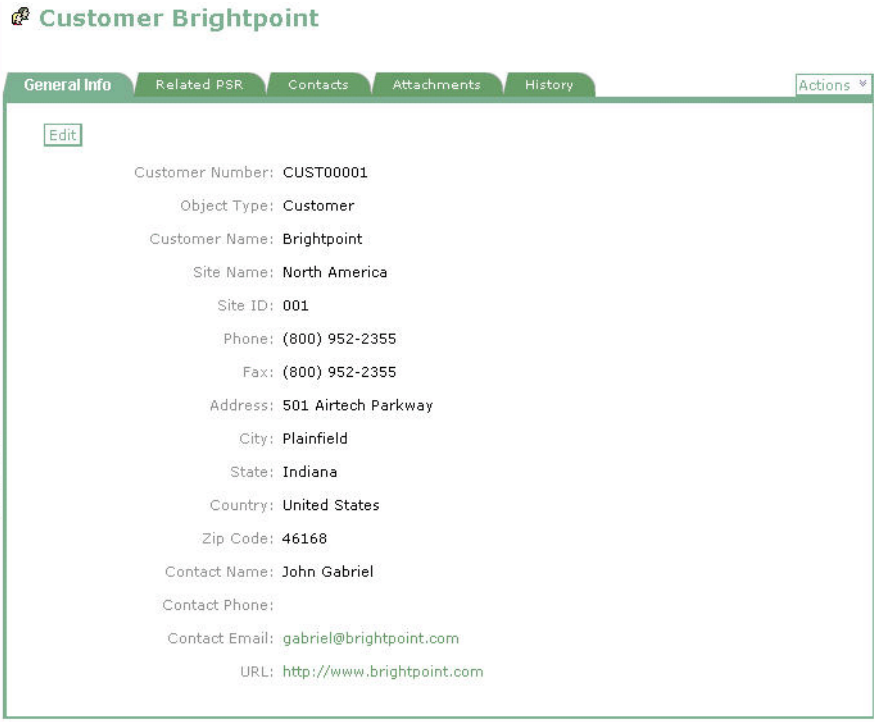
1. Select and open the customer.
2. On the General Info tab, click **Edit**.
3. In the editable fields, make the changes you want.
4. When your modifications are complete, click **Save**.

Note If you edit the **Customer Name** or **Customer Number** field, the new value is reflected in all of the sites. The new value is reflected in any objects that reference the customer, such as PSRs, CARs, and items.

Viewing Customer Objects

When you locate and open a customer object, you see that customer's tabbed page. In Agile Advantage, the customer window appears as shown in the following figure.

Figure 7-8: Customer in Agile Advantage



Deleting a Customer

The Agile Web client supports "soft" deletions, which remove the object from view but leave it in the Agile database. To hard-delete an object, which removes it from the Agile database, you must use the Agile Windows client.

Each customer object includes site information. When you delete a customer object, you delete only that site. To delete all sites of a customer, you must delete each site individually.

Soft-Deleting a Customer

To soft-delete a customer:

1. Open the customer that you want to delete.
2. Click the **Related PSR** tab.

   If the customer is referenced by a problem report or issue, you cannot delete it.
3. Choose **Actions | Delete.**

   The customer is soft-deleted. It is no longer available for use. However, until it is hard-deleted (in the Agile Windows client), its number is reserved and cannot be reused.

Undeleting a Customer

Because soft-deleted objects still exist in the database, you can undelete them if you have the necessary privileges.

To undelete a customer:

1. Find the soft-deleted customer that you want to undelete:

   From the Quality Administrator Searches folder, run the Deleted Customers search to locate the soft-deleted customer you want to undelete.

   You can also select it in the Recently Visited folder, if it is among the last objects that you have viewed.
2. Open the appropriate deleted customer.
3. Choose **Actions | Undelete**.

   The previously soft-deleted customer is undeleted and is once more available to users.

Working with Product Service Requests

This section covers working with Product Service Requests (PSRs), which include problem reports and issues. For information about how problem reports and issues are used, see "Problem Reports" on page 7-7 and "Issues" on page 7-12.

This section includes the following topics:

- Creating a Problem Report
- Creating an Issue
- Working with the Related PSR Tab of an Issue
- Submitting and Routing a PSR
- Approving, Rejecting, and Commenting on PSRs
- Releasing a PSR
- Editing a PSR
- Deleting a PSR
- Closing a PSR

Creating a Problem Report

You must have the necessary privileges to create a problem report object. A problem report object is created the same way other Agile objects are created. You can create a problem report from the **Create** menu in Agile.

You can also create a problem report using the **Save As** command on the **Actions** menu.

To create a problem report:

1. Choose **Create | Product Service Request**.

   The Create New PSR page appears.

2. Select a problem report subclass.

3. Type the number of the proposed problem report in the **Number** field.

   Or click the **AutoNumber** button  to automatically enter the number. This provides a list of autonumber choices if multiple autonumber sources are available. The autonumber format and sequence are determined by your Agile

administrator. Your Agile administrator also determines whether using autonumbers is required or optional.

4 Click **Next** to display the Enter Cover Page Tab Data page.

5 Enter appropriate **Cover Page** tab information.

Note If you create a problem report after the release of an ECO that resolves the problem, you can edit the **Rev Fixed** field, selecting the revision that fixed the problem. The **ECO Number** field fills in automatically.

6 When you have completed it, click **Next** to add attachments, or click **Finish** to create the problem report without attachments and without submitting it.

7 If you clicked **Next**, add all appropriate files and URLs on the Add Attachments page.

8 Click **Next** for an opportunity to submit the completed problem report, or click **Finish** to create the problem report without submitting it.

If you click **Next**, the Save or Submit page appears.

9 Select whether to save the problem report without submitting it or to submit the problem report now, then click **Finish**.

If you choose to submit the problem report, the Change Status to Submitted page appears.

10 Enter the name of at least one quality analyst to notify and the names of any other users who should receive email notification. Separate the names with semicolons. Or click  to open the address book.

11 Enter any comments, and click **OK**.

The problem report appears with the **Cover Page** tab in front.

Creating an Issue

You must have the necessary privileges to create an issue object. An issue object is created the same way other Agile objects are created. You can create an issue from the **Create** menu in Agile.

You can also create an issue from another issue or from a problem report by using the **Save As** command on the **Actions** menu.

To create an issue from the Create menu:

1 Choose **Create | Product Service Request.**

The Create New PSR page appears.

2 Select an issue subclass.

3 Type the number of the proposed issue in the **Number** field.

Or click the **AutoNumber** button 123 to automatically enter the number. This provides a list of autonumber choices if multiple autonumber sources are available. The autonumber format and sequence are determined by your Agile administrator. Your Agile administrator also determines whether using autonumbers is required or optional.

4 Click **Next** to display the Enter Cover Page Tab Data page.

5 Enter appropriate **Cover Page** tab information.

Important If you plan to associate one or more problem reports with this issue, do not associate the issue with an item. Only issues with no related problem reports can be associated with an item.

6 When you have completed the **Cover Page**, click **Next** to add related PSRs and attachments, or click **Finish** to create the issue without attachments and without submitting it.

If you click **Next**, the Add Related PSRs page appears.

7 To add related problem reports to this issue, click **Add**.

The Add Problem Report(s) wizard appears.

8 If you have *not* associated an item with this issue, you can click **Add** and either search to find existing problem reports or select **Create** to create a new one. If you search, when the search results appear, check the problem reports that you want to add, then click **Finish** in the Add Problem Report(s) wizard.

Note If you have associated an item with the issue (during the Cover Page step), you cannot add any problem reports. Also, a problem report can be included in only one issue or CAR.

9 When you have finished adding problem reports, click **Next** to add attachments, or click **Finish** to create the issue without attachments and without submitting it.

10 If you click **Next**, add the appropriate attachments.

11 Click **Next** for an opportunity to submit the completed issue, or click **Finish** to create the issue without submitting it.
If you click **Next**, the Save or Submit page appears.

12 Select whether to save the issue without submitting it or to submit the issue now, then click **Finish**.
If you choose to submit the issue, the Change Status to Submitted page appears.

13 Enter the name of at least one quality analyst to notify and the names of any other users who should receive email notification. Separate the names with semicolons. Or click ... to open the address book and select users.

14 Enter any comments, and click **OK**.

The issue appears with the **Cover Page** tab in front.

Viewing PSR Objects

When you locate and open a PSR object, you see that object's tabbed page. The problem report page, and the issue page are shown in the following figures.

Problem report objects and issue objects have similar **Cover Page** tabs.

Figure 7-9: Problem Report in Agile Advantage



Figure 7-10: Issue in Agile Advantage



Working with the Related PSR Tab of an Issue

You can add related problem reports to an issue that meets the following conditions:

- The issue is not already associated with an item.
- The issue has not been released or closed.

You add problem reports on the **Related PSR** tab.

Note A problem report can be referenced by only one issue or CAR.

To add problem reports to an issue:

1. On the **Related PSR** tab, click **Add**.
2. The Add Problem Report(s) wizard appears.
3. Select a search option, or select **Create** to create a new problem report.

4 Click **Next**, and follow the wizard steps to find or create the problem reports to add.

5 Click **Finish** to add the problem reports to the **Related PSR** tab.

To remove problem reports from an issue:

1 On the **Related PSR** tab, check the problem reports that you want to delete.

2 Click **Delete**.

Submitting and Routing a PSR

The Create PSR wizard includes an option to submit the PSR in the final step. If you skipped this step, you can submit a PSR using the **Next Status** button or the **Signoff** tab. The process is the same as for submitting changes.

When you submit a PSR, the quality analyst is notified by email. The quality analyst can also use defined searches in the Public Inbox to find recently submitted PSRs. For details, see Chapter 16, "Sample Searches and Search Tips."

Using the same Agile buttons used to work with changes, the quality analyst can choose an action for the PSR, including:

- Audit the PSR.
- Return the PSR to the originator for more information.
- Route the PSR to a list of approvers and observers for review and information gathering.
- Accept the PSR.
- Cancel the PSR.

Note If the status of a PSR is changed back to Pending after it has been submitted, the **Date Assigned** value continues to reflect the initial submit date.

See Chapter 6, "Changes," for information about working with changes. For information about the default workflows for problem reports and issues, see the *Administrator User's Guide*.

Approving, Rejecting, and Commenting on PSRs

When a PSR is in a Review type or Released type status, users can approve, reject, or comment on the PSR by clicking the appropriate button at the top of the Problem Report or Issue page. These procedures are the same as for changes.

Note Comments can be added to a PSR in any status except the Closed type status.

Releasing a PSR

The procedures used to release a PSR are the same as for changes.

Editing a PSR

If you have the appropriate privileges, you can edit the **Cover Page** tab of a PSR.

To edit the Cover Page tab of a PSR:

1. On the **Cover Page** tab of the PSR that you want to edit, click **Edit**.
2. Make changes to any editable fields.
3. Click **Save** to save the changes.

Note If a PSR is not aggregated on a CAR, you must edit the **Rev Fixed** field on the **Cover Page** of the PSR. This indicates which item revision (of the item listed in the **Item Number** field) fixed the problem. The **ECO Number** field fills in automatically with the corresponding ECO number.

If you create a problem report after the release of an ECO that resolves the problem, you can edit the **Rev Fixed** field, selecting the revision that fixed the problem. The **ECO Number** field fills in automatically.

If a PSR is associated with a CAR, and that CAR is associated with an ECO, when that ECO is released, the **ECO Number** and **Rev Fixed** fields on the PSR **Cover Page** tab are automatically updated. These fields indicate the ECO number that fixed the item listed in the **Item Number** field, and item revision that was fixed.

Deleting a PSR

The Agile Web client supports "soft" deletions, which remove the object from view but leave it in the Agile database. To hard-delete an object, which removes it from the Agile database, you must use the Agile Windows client.

You can delete a problem report that meets the following conditions:

- The problem report has not been submitted; it is in the Unassigned status or the Pending type status.
- The problem report is not associated with an item.
- The problem report is not related to an issue.
- The problem report is not listed on the **PSR And Changes** tab of a CAR.

You can delete an issue that meets the following conditions:

- The issue has not been submitted; it is in the Unassigned status or the Pending type status.
- The issue is not associated with an item.
- The issue is not listed on the **PSR And Changes** tab of a CAR.
- The issue has no problem reports on its **Related PSR** tab.

To soft-delete a PSR:

1. Open the PSR that you want to delete.
2. Choose **Actions | Delete**. If the **Delete** command is dimmed, the PSR does not meet one of the conditions listed above.

   The PSR is soft-deleted. It is no longer available for use. However, until it is hard-deleted (in the Agile Windows client), its number is reserved and cannot be reused.

Undeleting a PSR

Because soft-deleted objects still exist in the database, you can undelete them, if you have the necessary privileges.

To undelete a PSR:

1. Find the soft-deleted PSR that you want to undelete:

   From the Quality Analyst Searches folder, run the Deleted PRs (problem reports) search or the Deleted Issues search to locate the soft-deleted PSR you want to undelete.

   You can also select the PSR in the Recently Visited folder, if it is among the last objects you have viewed.
2. Open the appropriate deleted PSR.

3 Choose **Actions | Undelete**.

The previously soft-deleted PSR is undeleted and is once more available to users.

Closing a PSR

PSRs can be closed (promoted to their Complete type status) in the following ways:

- The Agile administrator can set up the system so that a problem report closes automatically when the related issue closes.
- The Agile administrator can set up the system so that a PSR (problem report or issue) closes automatically when the related CAR closes.
- A user with appropriate privileges can manually close a PSR.

Working with CARs

A CAR is a type of change. For information about CARs, see "Corrective Action Requests" on page 7-13. For information about working with changes, see Chapter 6, "Changes."

This section covers working with CARs. It includes the following sections:

- Creating a CAR
- Viewing CAR Objects
- Working with the Affected Items Tab
- Working with the PSR And Changes Tab
- Submitting and Routing a CAR
- Approving, Rejecting, and Commenting on CARs
- Releasing a CAR
- Editing a CAR
- Deleting a CAR
- Closing a CAR
- Saving a CAR as an ECO

Creating a CAR

You must have the necessary privileges to create a CAR object. A CAR object is created the same way other Agile objects are created. You can create a CAR from the **Create** menu in the Agile Web client.

You can also create a CAR from another change by using the **Save As** command on the **Actions** menu.

Note When you use **Save As** to create a CAR from another CAR, information from the Related PSRs table is not copied to the new CAR. This is because each PSR can be listed on only one CAR.

When you create a change, you select a change type (subclass) and assign a number, then enter information for each tab. The Create wizard leads you through each step.

To create and complete a CAR:

1. Choose **Create | Change**.

   The Create New Change page appears.

2. Select a CAR subclass from the list.

3. Type the number of the proposed CAR in the **Number** field.

   Or click the **AutoNumber** button  to automatically enter the number. This provides a list of autonumber choices if multiple autonumber sources are available. The autonumber format and sequence are determined by your Agile administrator. Your Agile administrator also determines whether using autonumbers is required or optional.

4. Click **Next**.

   Agile creates the CAR and displays the Enter Cover Page Information page, where you enter descriptive information about the CAR.

5. Enter the Cover Page information by typing and selecting from lists. When it is complete, click **Next** to add affected items information and attachments, or click **Finish** to save the Cover Page information and display the change.

6. If you click **Next**, the Add Affected Items page appears. Use the **Add** button to add existing or new affected items.

7. When you finish adding affected items, click **Next** to add related PSRs and attachments, or click **Finish** to save the affected items information and display the change.

If you click **Next**, the Add Related PSR page appears.

8 You can click **Add** and either search to find existing PSRs or select **Create** to create a new one. If you search, when the search results appear, check the PSRs that you want to add, then click **Finish** in the Add Product Service Request(s) wizard.

9 When you have finished adding PSRs, click **Next** to add attachments, or click **Finish** to create the CAR without attachments and without submitting it.

10 If you click **Next**, the Add Attachments page appears. Add appropriate files and URLs.

11 When you finish adding attachments, click **Next** to submit the CAR for routing, or click **Finish** to save the attachments information and display the CAR.

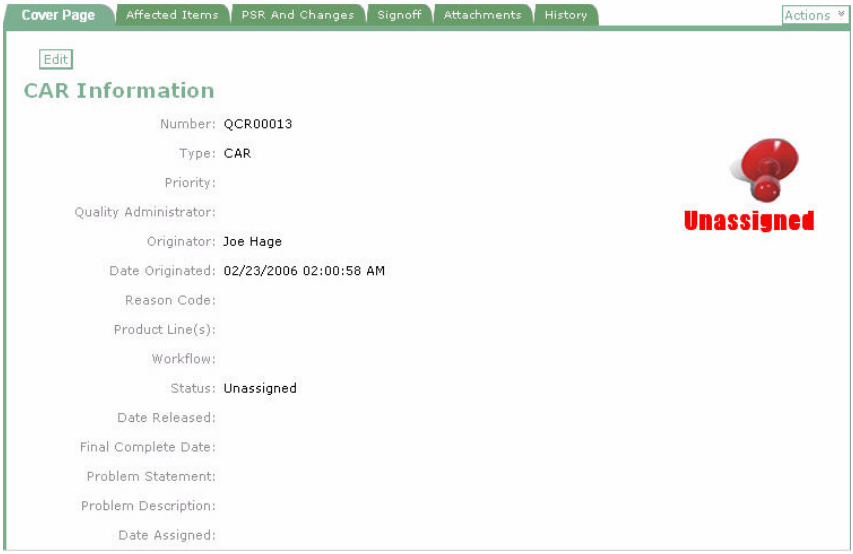
12 If you click **Next**, the Save or Submit page appears. Select whether to save the CAR without submitting it or to save and submit it now.

13 When you are done, click **Finish** to save the CAR. If you chose to submit it, the status stamp says "Submitted" by default.

Viewing CAR Objects

When you locate and open a CAR, you see that CAR's tabbed page. In Agile, the CAR page appears as shown in the following figure.

Figure 7-11: CAR in Agile Advantage



Working with the Affected Items Tab

For information about the **Affected Items** tab of a CAR, see "Affected Items Tab of a CAR" on page 7-16.

Working with the PSR And Changes Tab

The **PSR And Changes** tab of a CAR lists the issues, problem reports, and ECOs associated with this CAR. You can add PSRs and ECOs to the tables on this tab. Each PSR can be listed on only one CAR.

Note When you create an ECO from a CAR (by using the **Save As** command), that ECO appears on the CAR's **PSR And Changes** tab.

To add PSRs or changes to a CAR:

1. On the **PSR And Changes** tab, select the Related PSRs table to add a PSR or the Related Changes table to add a change.
2. Click **Add** and either search to find existing PSRs or changes or select **Create** to create a new one. If you search, when the search results appear, check the objects that you want to add, then click **Finish** in the wizard.
3. Select a search option, or select **Create** to create a new PSR or change.
4. Click **Next**, and follow the wizard steps to find or create the PSRs or changes to add.

   Note If you use Saved Searches to search for PSRs to add to a CAR, a **QCR Number** column in the search results table shows you whether the PSR is already listed on a CAR (and, therefore, cannot be listed on another CAR).

5. Click **Finish** to add the PSRs or changes to the **PSR And Changes** tab.

To remove PSRs and changes from a CAR:

1. On the **PSR And Changes** tab, check the PSRs that you want to delete.
2. Click the **Delete** button above the Related PSRs table.
3. Check the changes that you want to delete.
4. Click the **Delete** button above the Related Changes table.

Submitting and Routing a CAR

The Create Change wizard includes an option to submit the CAR in the final step. If you skipped this step, you can submit a CAR using the **Next Status** button or the **Signoff** tab. The process is the same as for submitting changes.

When you submit a CAR, the quality administrator is notified by email. The quality administrator can also use defined searches in the Public Inbox folder to find recently submitted CARs. For details, see Chapter 16, "Sample Searches and Search Tips."

Using the same Agile buttons used to work with the other types of changes, the quality administrator can choose an action for the CAR, including:

- Audit the CAR.
- Return the CAR to the originator for more information.
- Route the CAR to a list of approvers and observers for review.
- Accept the CAR.
- Cancel the CAR.

See Chapter 6, "Changes," for information about working with changes. For information about the default workflows for CARs, see the *Administrator User's Guide*.

Approving, Rejecting, and Commenting on CARs

When a CAR is in a Review type or Released type status, users can approve, reject, or comment on the CAR by clicking the appropriate button at the top of the page. These procedures are the same as for other types of changes.

Note Comments can be added to a CAR in any status except the Closed type status.

Releasing a CAR

The procedures used to release a CAR are the same as for changes.

If you unrelease a CAR, the status of the related PSRs remains unchanged.

Note Agile warns you if items in the Affected Items or Related Items table are *not* present on the Affected Items list of the referenced ECO, so that you can verify that all items affected by the CAR have been taken into account.

Editing a CAR

If you have the appropriate privileges, you can edit the **Cover Page** tab of a CAR.

To edit the Cover Page tab of a CAR:

1. On the **Cover Page** tab of the CAR that you want to edit, click **Edit**.
2. Make changes to any editable fields.
3. Click **Save** to save the changes.

Deleting a CAR

The Agile Web client supports "soft" deletions, which remove the object from view but leave it in the Agile database. To hard-delete an object, which removes it from the Agile database, you must use the Agile Windows client.

You can delete a CAR that meets the following conditions:

- The CAR has not been submitted; it is in the Unassigned status or Pending type status.
- The CAR has no objects on its **Affected Items** tab or **PSR And Changes** tab.

To soft-delete a CAR:

1. Open the CAR that you want to delete.
2. Choose **Actions | Delete**. If the **Delete** command is dimmed, the CAR does not meet one of the conditions above.

   The CAR is soft-deleted. It is no longer available for use. However, until it is hard-deleted (in Agile's Web client), its number is reserved and cannot be reused.

Undeleting a CAR

Because soft-deleted objects still exist in the database, you can undelete them if you have the necessary privileges.

To undelete a CAR:

1. Find the soft-deleted CAR that you want to undelete:

   From the Quality Administrator Searches folder, run the Deleted CARs search.

   You can also select the CAR in the Recently Visited folder, if it is among the last 20 objects you have viewed.
2. Open the appropriate deleted CAR.
3. Choose **Actions | Undelete.**

   The previously soft-deleted CAR is undeleted and is once more available to users.

Closing a CAR

If you have appropriate privileges, you can close a CAR (promote it to its Complete status type). Typically, when an ECO related to a CAR is released, the quality administrator determines whether that CAR is resolved and can be closed.

Depending on how the Agile administrator has set up the quality-related SmartRules, when a CAR is closed, related PSRs can be closed automatically.

Saving a CAR as an ECO

You can create an ECO from a CAR using the **Save As** command on the **Actions** menu. When you do so, the affected items and related items of the CAR are not automatically carried over to the ECO. Instead, the Agile Advantage Web client gives you a list of the affected items and related items so that you can select the items that you want to carry over. This allows you to break the CAR into multiple ECOs as desired.

Note If you create multiple ECOs from a CAR, and each ECO has the same affected items, the ECO Number and Rev Fixed displayed on the Cover Page of related PSRs reflect the latest released ECO.

If an ECO is created against the item directly (without an associated CAR), you can fill in the PSR's **Rev Fixed** field manually. When you do this, the **ECO Number** field is updated automatically.

To save a CAR as an ECO:

1. From an open CAR choose **Save As** from the **Actions** menu.
2. Select an ECO sub type.

3 In the **Number** field, type a number or click the **AutoNumber** button to automatically enter the number.

4 Click **Save As**.

Agile creates the ECO and displays the ECO with the **Cover Page** tab on top.



CHAPTER 8

Bills of Material (BOMs)

This chapter discusses bills of material on the BOM tab of items and redlining bills of material on the Affected Items tab of changes.

The main topics are:

- *About Bills of Material*
- *BOM Tab*
- *Opening Items on a BOM*
- *About Modifying the BOM Table*
- *Revision Display on BOMs*
- *Working with Reference Designators*
- *Redlining the BOM of a Released Item*
- *Printing BOM Data*

About Bills of Material

Bills of material show all the items that make up the current part. Documents may or may not have bills of material, depending on your system settings. Items on a bill of material can be single items or assemblies of several items.

BOM Tab

This section includes the following topics:

- How Discovery and Read Privileges Affect What You See on the BOM Tab
- BOM Tab Buttons
- BOM Table Fields

The **BOM** tab lists all the items on a bill of material.

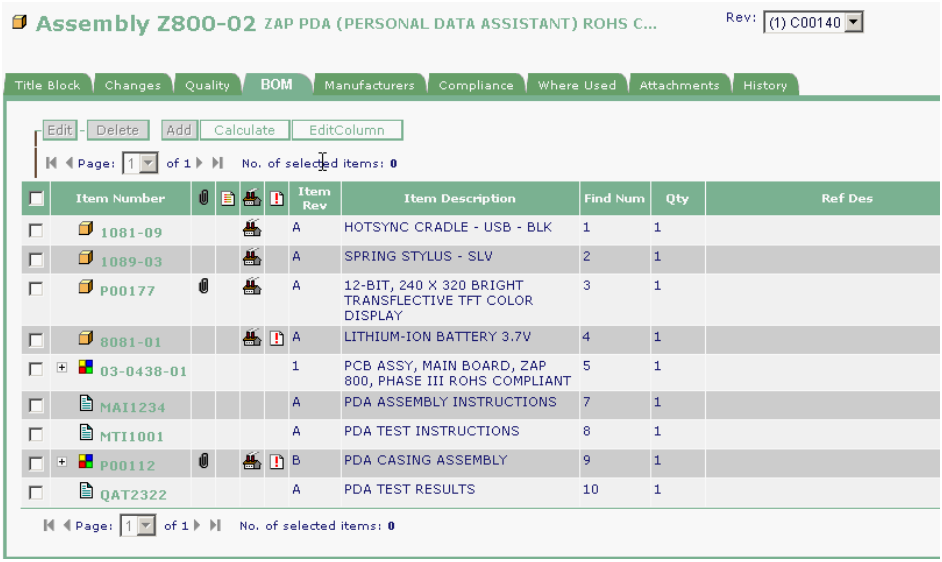
The Agile BOM table displays the items on the BOM in a graphical hierarchy, using icons to indicate whether an item number represents:


A part


A document


An assembly

Figure 8-1: BOM Tab of a Part



Note Documents may or may not have a **BOM** tab, depending on your system configuration. See your Agile administrator.

Managing the Columns of the BOM Tab

You can customize the order of the BOM Tab columns by using the **EditColumn** button.

To modify the column order:

1. Click on the **BOM** tab.
2. Click on the **EditColumn** button.
   The **Column List** dialog box appears.
3. To reorder a specific column, select it from the **Selected Values** pane, and do the following:
   a. Click on the up arrow to move the column to the left.
   b. Click on the down arrow to move the column to the right.
4. Click **OK** to save the new order and close the **Column List** dialog box.
   The changes are automatically mirrored on the **BOM** tab.

How Discovery and Read Privileges Affect What You See on the BOM Tab

Your Agile administrator may assign to you:

- **Discovery privileges**, which determine and limit which Agile objects you can find, or discover, in the Agile database.
- **Read privileges**, which determine and limit which discovered Agile objects you can open and read and which specific fields you can view on the Agile objects that you can open and read.

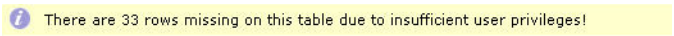
If you do not have the Discovery privilege for an item, that item may not be displayed on the BOM table, depending on which SmartRule setting the Agile administrator has selected. For the BOM table only, the SmartRule setting is also applied to the fields for which you do not have Read privilege.

The items on the BOM for which you do not have Discovery privilege and the fields on the BOM table for which you do not have Read privilege are indicated by one of the following methods:

- Only the item number and rev are displayed on the BOM table. You cannot open the item if you do not have Discovery privilege.

- Only the item description is displayed on the BOM table. You cannot open the item if you do not have Discovery privilege.
- The item is not displayed on the BOM table. A message at the bottom of the BOM table tells you how many items have not been displayed.

Figure 8-2: BOM warning message



If you have questions about your Discovery or Read privileges, see your Agile administrator.

BOM Tab Buttons

Table 8-1: BOM tab buttons

Button	Description of BOM tab buttons
Add	The **Add** button adds an item at the end of the BOM table. It can be an existing item or one you create while adding it.
Delete	The **Delete** button removes the selected rows from the BOM table.
Edit	The **Edit** button lets you redline the BOM by displaying the selected rows on an Edit page. The editable fields are in the form of text boxes, list boxes, etc.
Calculate	The **Calculate** button performs not only a cost rollup on the assembly itself, but will also recalculates the cost of every Manufacturer Part, every Component and every Sub-assembly and displays the cost automatically on the Target Cost in the **Title Block** tab.
EditColumn	The **EditColumn** button lets you customize the order of the BOM Tab columns.

Note The **Actions** menu at the right side of the page lets you print, email, and perform other activities from the **BOM** tab.

BOM Table Fields

Figure 8-1 on page 8-2 shows a BOM table. Its fields and icons appear as listed in the following table.

Table 8-2: BOM table fields

Field name	Description of BOM tab field
Item Number	The **Item Number** field contains the item's number. Click an item number to open that item page.
	The appearance of this icon indicates that the item has an attachment.
	The appearance of this icon indicates that the item has a pending change.
	The appearance of this icon indicates that the item contains manufacturing data.
	If your company is licensed to use quality tracking features, a column on the BOM tab displays an icon for items referenced by open PSRs. See Chapter 7, "Agile Quality Management."
Item Description	The **Item Description** field contains the description of that item.
Item Rev	The **Item Rev** field shows the revision number of the BOM item. By default, the latest released rev is displayed.
Find Num	The **Find Num** field shows the internal number used to locate that item in an Agile bill of material.
Qty	The **Qty** field shows the quantity of that item used in the assembly or subassembly.
Ref Des	The **Ref Des** field contains the reference designators.
BOM Notes	The **BOM Notes** field contains notes about the item.
Target Cost	The **Target Cost** field contains the part's cost.

Note The **Effective From** date is different from the **Rev Release Date** field on the **Title Block** tab. The rev release date is the release date of the ECO that released the current revision of the item.

Opening Items on a BOM

In general, you can open any item listed on a BOM by clicking its item number. When you open an item, its page appears.

This section includes the following topics:

- Opening a Part, Assembly, or Document from the BOM Tab
- Viewing a Child Item on an Assembly
- Expanding and Collapsing an Assembly

Opening a Part, Assembly, or Document from the BOM Tab

To open a part, assembly, or document on the **BOM** tab, click its item number. The item opens with the **Title Block** tab on top.

Viewing a Child Item on an Assembly

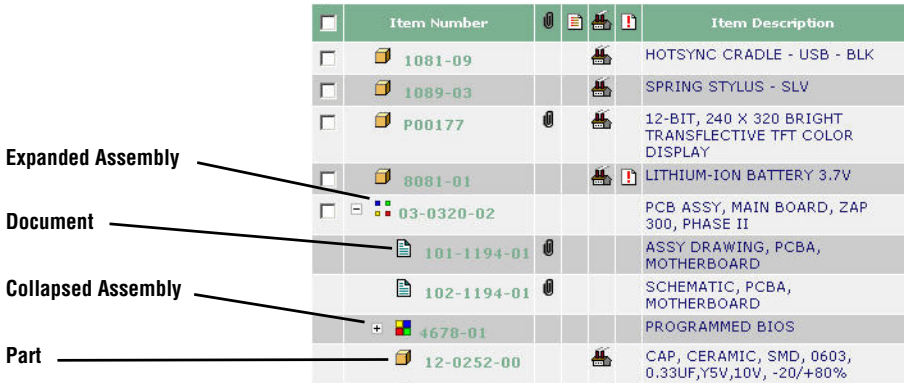
To view a child item on an assembly, you must first display the child item on the BOM by expanding its tree structure (click ⊞ before the item number).

You can open any item listed on a BOM by clicking its item number.

You can also view the BOM of a pending revision by selecting the pending revision (marked with parentheses, for example, Rev (B)) from the **Rev** drop-down list above the tabs. See "Viewing Different Revisions of the Same Item" on page 3-6 for more information about viewing different revisions of the same item.

Expanding and Collapsing an Assembly

Figure 8-3: Close-up of the BOM tree



To expand an assembly:

Click ⊞.

To collapse an assembly:

Click ⊟.

About Modifying the BOM Table

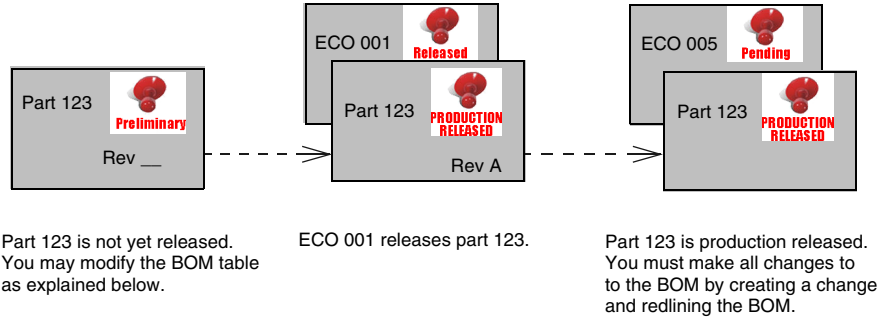
If an item is not yet released, and has no changes pending against it, you can modify (add, delete, or edit) the BOM table directly.

If the item has been released or has a pending MCO against it, you must write an ECO against the item and redline its BOM. If the item already has a pending ECO against it, you can redline the BOM without creating another ECO. See "Redlining the BOM of a Released Item" on page 8-14.

This section includes the following topics:

- Modifying the BOM Table of a Preliminary Item
- Adding Items to the BOM Table
- Deleting Items from the BOM Table

Figure 8-4: Modifying the BOM of a Preliminary Item and a Production Released Item



Modifying the BOM Table of a Preliminary Item

You can modify the BOM table of an item that has *not* been released.

When you create a new item and then click the **BOM** tab, the page displays a blank **BOM** tab.

To modify the BOM table:

1. Open the unreleased item.
2. Click the **BOM** tab.
3. Select the rows you want to modify and click **Edit**.
4. Make the modifications. Click **Save**.

Adding Items to the BOM Table

When you add an item to the BOM, it is added below the selected item.

To add one item to the BOM table:

1. Click the **BOM** tab.
2. Click the **Add** button.

   The Add BOM(s) wizard appears.
3. Follow the instructions in "Finding Agile Objects" on page 2-7 to find an existing item to add, or select **Create** to create and add a new item.
4. Follow the onscreen instructions to finish adding the item.

Adding Nonexistent Items to the BOM Table

You can add an item to a BOM that hasn't been created yet. Just use the **Add** button, and then select **Create** on the Identify Items page.

Note If you create a new item and decide you do not wish to keep it, you should delete it from the database with the **Delete** command on the **Actions** menu. For more information about deleting items from the BOM, see the next section, "Deleting Items from the BOM Table."

Deleting Items from the BOM Table

To delete an item from the BOM table:

1. Select the item by checking the box in front of its row. You can check more than one row.
2. Click the **Delete** button on the **BOM** tab.

   The item is deleted from the BOM table.

Caution! Be sure to use the **Delete** button on the **BOM** tab, *not* the **Delete** command on the **Actions** menu. If you use the **Delete** command, the *entire item is deleted*.

Revision Display on BOMs

The revision number (or letter) that appears in the **Item Rev** field of the BOM table is calculated by checking the release date of the parent item, if already released, then locating the latest revision of the child item prior to that date and analyzing it. If the parent item hasn't been released, the most recent revision of the child item is found. For details, see "Details About Revision Display on BOMs" on page 15-8.

The child item revision is analyzed according to three criteria:

- Its lifecycle Phase (Preliminary or other)
- Whether there are any released revisions of the child item
- Whether there are any pending revisions of the child item

Depending on which revision of the parent you select, the child revision displayed may or may not be the latest revision of that child item. The following is an explanation of which child revision will appear:

- The latest revision of the parent item will always display the latest revision of the child item. This means the parent BOM will reflect any changes that may be made to the child item since the parent rev was released. This applies until such time as the next rev of the parent is released.
- The rev shown for a child item of any past rev of the parent item will be the latest revision as of the instant in time just preceding the next parent rev.
- For each child item, the lifecycle phase appears that corresponds to the displayed revision.

  The child item may display a blank revision field if it has no Rev number as of the Parent rev. This will occur if the child item has never been released as of the present moment, in the case of viewing the latest parent rev; or else if it had not been released by the time of the next occurring parent rev, in the case of viewing past parent item revs.

Caution! Be aware that the unrelease and release of child items may affect the child revs displayed on the parent bill of material.

BOMs of Items Affected by an ECO

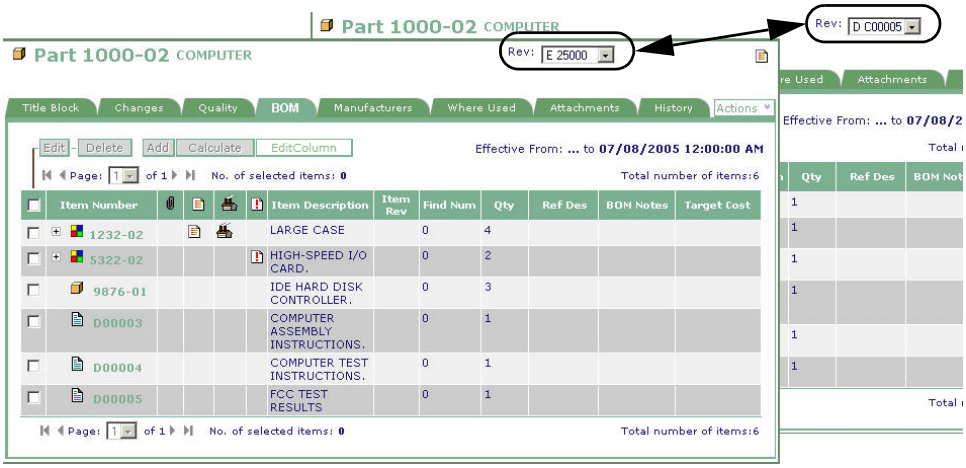
When you create an ECO against an item, Agile creates a new revision of any item affected by that ECO. The new revision has an updated BOM based on the redlines.

For example, consider the following scenario in which someone does the following:

1. Creates an ECO that modifies part #1000-02 by modifying the currently used Item Quantities.
2. Releases the ECO.
3. Examines the BOM of item #1000-02.

When the ECO is released, Agile displays the changed item as a new revision of item #1000-02. The new revision incorporates the modifications made by the ECO. The following figure shows how the BOM of item #1000-02 reflects the released ECO.

Figure 8-5: Viewing two revisions of an item



Working with Reference Designators

Reference designators are commonly used in the electronics industry as a labeling system to refer to components. If your company uses reference designators, you can assign and edit reference designators in Agile bills of material.

The **Ref Des** field displays one row of reference designators. If there are more, you can click the field once to expand the display to show all rows. If you double-click the field, all reference designators are displayed in a pop-up window.

This section includes the following topics:

- Adding Reference Designators
- Deleting Reference Designators
- Modifying Reference Designators

Adding Reference Designators

Note Depending on the reference designator settings selected by your Agile administrator, you may not be able to specify ranges of reference designators, for example, R1–R25. In that case, you must enter reference designators individually. If you have questions about reference designator behavior on your system, see your Agile administrator.

You can enter, delete, and modify reference designators, either individually or several at once. If you have very few reference designators, you can enter them one by one (that is, R1, R2, R3). If you need to enter a larger set, you may use the format (R*x*–R*y*), where *x* and *y* are any numbers, but whose difference is less than 5000 (for example: R6–R2055).

Note By default, Agile Advantage does not support the use of leading zeros in reference designators. For example, if you enter `0003` as a reference designator, the leading zeros are dropped, and it is recorded as `3`.

For manageability, reference designator sets are limited to 5000. If you want to enter more than 5000 reference designators, you need to enter them in multiples of 5000, separating the ranges of reference designator with commas, as shown in the following example:

```
R1-R5000, R5001-R8000
```

Note Reference designators that end in a letter (for example, R1a, R2a, R3a) must be entered individually. If you add them as a group (for example, R1a–R3a), Agile drops the letter suffix and treats them as one reference designator named "R1a–R3a."

Reference designators are not sorted until you complete edits to the current item.

If the number in the **Qty** field does not match the number of reference designators, you see a message indicating that the reference designators and quantity don't match.

Agile contracts (collapses) consecutive reference designators. For example, reference designators 1, 2, 3, 4, and 5 appears as 1–5.

To add groups of reference designators that begin with different letters, you must press Enter after adding each group. For example, to enter the 10 designators A1, A2, A3, B4, B5, B6, B7, C8, C9, and C10, you would:

1. Type `A1-A3`, then press Enter.
2. Type `B4-B7`, then press Enter.
3. Type `C8-C10`, then press Enter.

If the number in the **Qty** field does not match the number of reference designators, you see the message, "Reference Designator/Quantity Mismatch."

To add reference designators:

1. Click **Edit** on the **BOM** tab to display the Edit page.
2. Type the reference designators in the **Ref Des** field.
3. Press Enter to enter the reference designators and leave the **Ref Des** field selected.

   Or press Tab to enter the reference designators and select the **BOM Notes** field.

   Note If you need to, you can enter a new number in the **Qty** field.

Agile contracts (collapses) consecutive reference designators. For example, reference designators R1, R2, R3, R4, and R5 appear as R1–5. However, you can double-click the **Ref Des** field to open a pop-up window that parses (expands) the individual reference designators.

If there are more reference designators than are visible in the field, you can click the field to expand it, showing all the reference designators listed.

Deleting Reference Designators

You can delete reference designators either individually or several at once.

Caution! Be sure to use the keyboard Delete key, not the **Delete** button on the **BOM** tab.

To delete reference designators:

1. Click **Edit** on the **BOM** tab to display the Edit page.
2. Click the **Ref Des** field.
3. Select the appropriate reference designators.

   To select a single reference designator, either double-click the appropriate reference designator, or use the Shift and arrow keys. To select several contiguous reference designators, use the Shift and arrow keys.
4. Press the keyboard Delete key.

Caution! Be sure to use the keyboard Delete key, not the **Delete** button on the **BOM** tab. If you click the BOM **Delete** button, all the reference designators are deleted.

Modifying Reference Designators

You can modify reference designators, either singly or several at once.

In Agile, to modify reference designators:

1. Click **Edit** on the **BOM** tab to display the Edit page.
2. Click the **Ref Des** field.
3. Select the appropriate reference designators.
   - To select a single reference designator, either double-click the appropriate reference designator, or use the Shift and arrow keys.
   - To select several contiguous reference designators, use the Shift and arrow keys.
   - To add a reference designator, position the cursor at the end of the list of reference designators.
4. Type the modified reference designator.
5. Press Enter to enter the modified reference designators and leave the **Ref Des** field selected.

   Or press Tab to enter the reference designator and select the **Notes** field.
6. Click **Save**.

Redlining the BOM of a Released Item

If an item is released, or has pending changes against it, you must create an ECO against that item and redline it to modify the BOM table.

When you add an item that has pending changes to the **Affected Items** tab, Agile adds the item and displays a Redline icon before it to indicate that data has been modified. You can click the icon to open the **Redlines** page and view the changes.

This section includes the following topics:

- Redlines Page
- Adding an Item to a BOM Redline Table
- Deleting an Item from a BOM Redline Table
- Editing an Item on a BOM Redline Table
- Undoing Changes to a BOM Redline Table

You can redline a BOM only from an ECO. You cannot redline a BOM from an MCO.

Depending on your system configuration, ECOs may be used to redline the manufacturing data of an item as well as BOM data. See "About Redlining Manufacturing Data" on page 4-22 for information about redlining manufacturing data from an ECO.

If you do not have the Discovery privilege for an item on the BOM table, you cannot redline that item. You cannot replace an item on the BOM table with an item that you cannot discover.

Redlines Page

The **Redlines** page displays the BOM, manufacturing data, and attachments for the item currently selected in the affected items table. See Figure 8-7 on page 8-19 for an illustration.

If you have the appropriate privileges, you can modify a redlined BOM by:

- Editing an item on the table (see "Editing an Item on a BOM Redline Table" on page 8-18).
- Adding an item to the table (see "Adding an Item to a BOM Redline Table" on page 8-17).
- Deleting an item from the table (see "Deleting an Item from a BOM Redline Table" on page 8-17.)

Note You can add nonexistent items to the BOM Redline table. See "Adding Items to the BOM Table" on page 8-8.

Opening the BOM Redline Tab

When you select an item in the affected items table of an ECO, its bill of material appears in the BOM Redline table.

To open the Redlines page for an item's BOM:

1 On the **Affected Items** tab, click the  icon in front of the item you want to view.

The **BOM Redline** tab, **Manufacturer Redline** tab, and **Attachment Redline** tab appear on the Redlines page, displaying the item's BOM data, manufacturing data, and attachments respectively.

Note If your Agile Advantage system does not use the **Manufacturers** tab or, on documents, the **BOM** tab, then those redline tabs do not appear on the **Redlines** page. If you have questions about Agile Advantage system settings, see your Agile administrator.

2 Display the **BOM** tab, if it is not displayed.

If a row in the table has a red line through every cell, it means that item was deleted from the bill of material. If just a few of the cells have a short red line through them, it means the item was modified. Any cell that was modified has a red line through the old value; the new value appears in red.

BOM Redline Tab Buttons

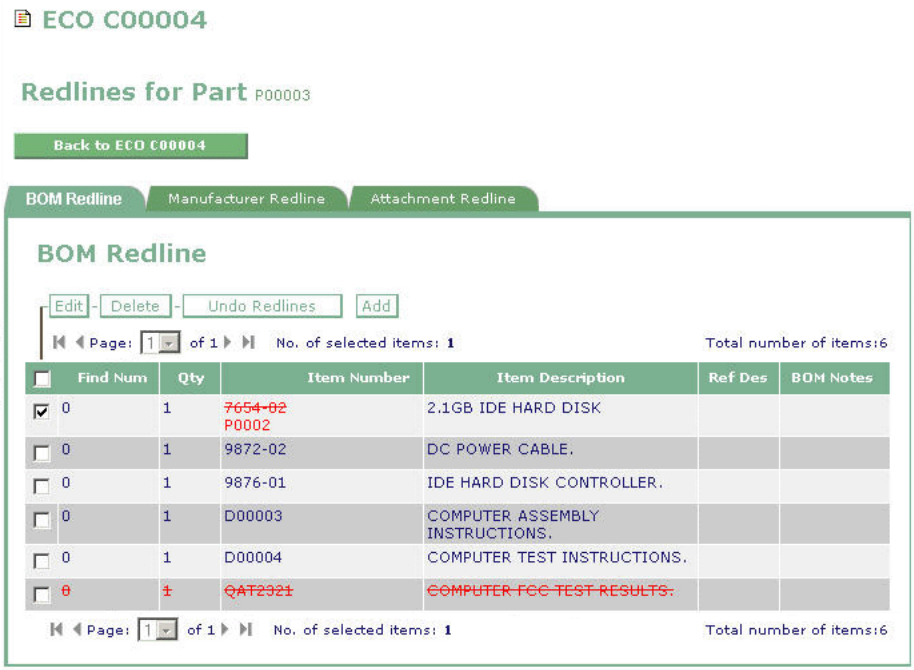
Table 8-3: BOM Redline Tab Buttons

Button	Use
Edit	The **Edit** button displays the selected rows on an Edit page so that you can change editable fields.
Add	The **Add** button adds an empty row below the selected rows of the BOM Redline table.
Delete	The **Delete** button removes the selected row from the BOM Redline table.
Undo Redlines	The **Undo Redlines** button clears the redlines from the selected rows. See "Undoing Changes to a BOM Redline Table" on page 8-20.

When you redline the **Item Number** field and press **Tab**, Agile automatically redlines the **Item Description** field.

The following figure shows a BOM redline that has had one item deleted (QAT2321) and one item modified (7654-02).

Figure 8-6: A BOM with Both Deleted and Redlined Items



Adding an Item to a BOM Redline Table

To add an item to the BOM Redline table:

1. If the BOM already contains items, check the row below which you want to add an item.
2. Click the **Add** button.

   The Add BOM(s) wizard appears.
3. Follow the instructions in "Finding Agile Objects" on page 2-7 to find an existing item to add, or select **Create** to create and add a new item.
4. Follow the onscreen instructions to finish adding the item.

Deleting an Item from a BOM Redline Table

You use the **Delete** button on the **BOM Redline** tab to remove one or more rows and items.

- If the selected rows are red, they are removed.
- If the selected rows are black, a red line is drawn through them.

To delete an item:

1. Select one or more rows.
2. Click the **Delete** button on the **BOM Redlines** tab.

Caution! Be sure to use the BOM Redline **Delete** button, not the **Delete** command on the **Actions** menu. If you use the **Delete** command, the entire item is deleted.

Editing an Item on a BOM Redline Table

You can modify all BOM Redline table fields except for the **Description** field.

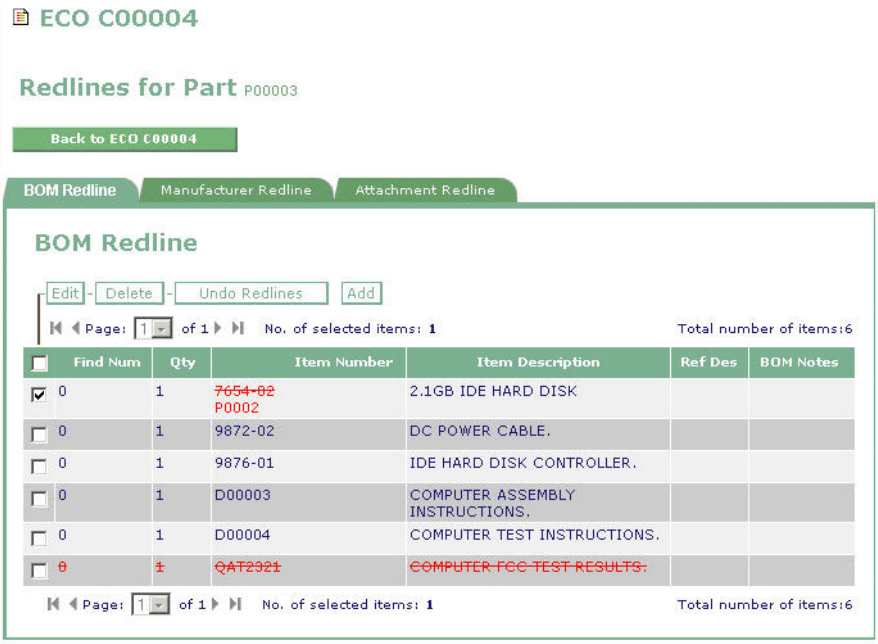
To edit a field (other than the reference designator field) on the BOM Redline table:

1. Select the rows to edit, and click **Edit**.
2. Click inside each field and make the required changes.
3. Click **Save**.

   Agile draws a red line through the old information and enters the new information, in red, below the old information.

The figure below is a close-up of a BOM redline that has had one item deleted (QAT2321) and one item modified (7654-02).

Figure 8-7: A BOM with Both Deleted and Redlined Items



Redlining the BOM Notes Field

When you redline the **BOM Notes** field, you can:

- Add text to an empty **BOM Notes** field.
- Replace the current text with new text.
- Edit the existing text.

To add text to an empty BOM Notes field or edit text within it:

1. Select the row to edit, and click **Edit**.
2. Select some or all of the text in the **BOM Notes** field, or use the **Delete** and **Backspace** keys on the keyboard to delete any unwanted text.
3. Type the new BOM notes text.
4. Click **Save**.
   The new text and any redlined text are displayed in the **BOM Notes** field.

Redlining the Reference Designator Field

Redlining reference designators in the BOM Redline table is the same as editing reference designators on the BOM table. For more information, see "Working with Reference Designators" on page 8-11.

Any new reference designators appear in red. Any deleted reference designators have a red line drawn through them.

Undoing Changes to a BOM Redline Table

The **Undo Redlines** button lets you undo modifications to the **BOM Redline** tab. It removes the red elements from the selected row.

To undo a delete (where Agile draws a red line through the entire row):

1. Select the deleted row. You can check more than one row.
2. Click **Undo Redlines**.

To undo a modification (where Agile draws a short red line through the modified value):

1. Select the modified row (or rows).
2. Click **Undo Redlines**.

   Note If the modified field was the **Ref Des** field, *all* modifications to that item are undone.

To undo a newly added item (remove it from the BOM Redline table):

1. Select the added row (or rows).
2. Click **Undo Redlines**.

Printing BOM Data

You can use the **Actions** menu to print the **BOM** tab from your Web browser. For more information, see "Printing Objects" on page 2-13.



CHAPTER 9
Affected Items of Changes

This chapter discusses working with the Affected Items tab of changes. It includes these topics:

- *Affected Items Tab*
- *Opening Items Listed on the Affected Items Tab*
- *Viewing the Redlines Page of an Affected Item*
- *Viewing the Disposition of Parts in an ECO*
- *Adding an Item to the Affected Items Tab*
- *Removing an Item from the Affected Items Tab*
- *Editing a Row in the Affected Items Tab*

Affected Items Tab

This section includes the following topics:

- Buttons on the Affected Items Tab
- Fields on the Affected Items Tab

Note The **Affected Items** tab of a CAR is different from that of a change. For information about the **Affected Items** tab of a CAR, see "Affected Items Tab of a CAR" on page 7-16.

The **Affected Items** tab lists the items that are affected by a change. Users with sufficient privileges can use the **Affected Items** tab to:

- List the items affected by a change and give those items a pending revision
- View affected item pages

- Create, view, or modify the **BOM Redline** tab of affected items (ECOs only)
- Create, view, or modify the **Manufacturer Redline** tab of affected items (ECOs and MCOs only)
- Add redlines to attachments of items (ECOs only)
- Specify the disposition of existing parts (ECOs only)

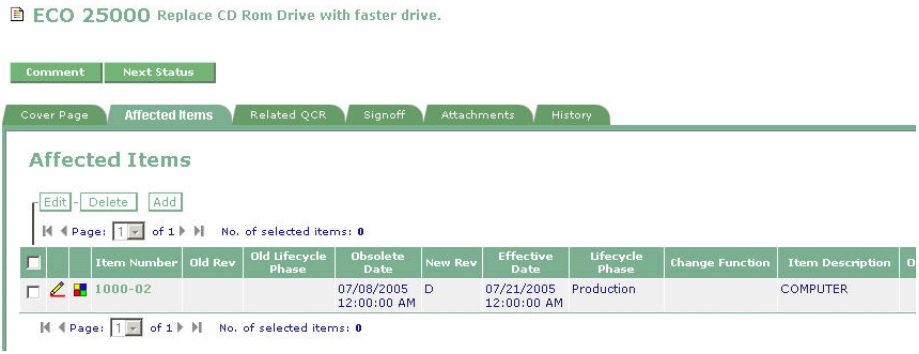
Users with Read privileges can:

- Open affected items
- Redline affected items (ECOs only)
- View the disposition of existing parts (ECOs only); you must scroll to the right to bring the disposition fields into view.

Note If you do not have the Discovery privilege for an item, it does not appear on the **Affected Items** tab. You may see a message at the bottom of the page telling you how many items are not displayed. Depending on your Read privileges, you may not be able to view all the fields on the **Affected Items** tab. For more information, see "Details About the Discovery and Read Privileges" on page 15-2. If you have questions about your Discovery or Read privileges, see your Agile administrator.

The following figure shows a completed **Affected Items** tab.

Figure 9-1: An Affected Items Tab of a Change



Buttons on the Affected Items Tab

Most buttons on this tab require Create or more restrictive privileges. The following buttons on the **Affected Items** tab are enabled or grayed, depending on your privileges and whether it is appropriate to use them.

Table 9-1: Buttons on the Affected Items tab

Button	Description
Edit	Displays the selected (checked) item on an Edit page.
Delete	Deletes the selected item from the affected items table.
Add	Adds an item below the selected item. You can search on the Add page to find an existing item or select **Create** on the Add page to create a new item.

Redline Indicator

Indicates that the listed item has redlines against it ().

Fields on the Affected Items Tab

By default, all change types have the **Item Number** and **Description** fields on the **Affected Items** tab.

An ECO also has fields for:

- Old and new revision
- Obsolete and effective date
- Old lifecycle phase (automatically filled in)
- Lifecycle phase
- Change function
- Specifying the disposition of parts (On Order, Stock, Work In Progress, Finished Goods, Field)

An MCO also has fields for:

- Old lifecycle phase (automatically filled in)
- Lifecycle phase

For comparison, the following table shows all the **Affected Items** fields for each change class.

Table 9-2: Comparison of fields for each change class

Affected Items tab field	ECO	MCO	ECR	Stop ship	Deviation
Item Number	✓	✓	✓	✓	✓
Item Description	✓	✓	✓	✓	✓
Old Rev	✓				
Obsolete Date	✓				
New Rev	✓				
Effective Date	✓				
Old Lifecycle Phase	✓	✓			
Lifecycle Phase	✓	✓			
Change Function	✓				
On Order	✓				
Stock	✓				
Work in Progress	✓				
Finished Goods	✓				
Field	✓				

The **Obsolete Date** field applies to the prior revision of the affected item, not the new revision. The obsolete date is the date the old revision becomes obsolete.

The **Old Lifecycle Phase** field is filled in automatically when you add the item to the **Affected Items** tab.

By default, the lifecycle phase list has the following entries (more can be added in Agile Administrator):

- **Inactive** — Temporarily not in use and may be reactivated.
- **Obsolete** — Permanently discontinue the item.
- **Pilot** — Build with limited initial quantities as a pilot project.
- **Production** — Release for regular production.
- **Prototype** — Produce in very limited quantities for testing.

The administrator can fill the **Change Function** field list with the following entries:

- **Interchangeable** — New revision of a part that is compatible with the old revision.
- **Non Functional** — No change to a part, only to part documentation.
- **Release** — Used for new parts.

Note All required fields must be completed before a change can be released. Your Agile administrator determines which fields are required. Use the **Audit Status** or **Audit Release** command on the **Actions** menu to verify that all required fields have been completed. For more information about auditing, see "Auditing Changes" on page 6-29. See your Agile administrator if you have questions about required fields.

Opening Items Listed on the Affected Items Tab

To open an item listed on the **Affected Items** tab, click its item number. The item opens with the **Title Block** tab displayed.

Viewing the Redlines Page of an Affected Item

If an affected item has a bill of material, or a **Manufacturers** tab, or attachments, you can view its **Redlines** page:

- For information about the **BOM Redline** tab, see "Redlining the BOM of a Released Item" on page 8-14.
- For information about the **Manufacturer Redline** tab, see "About Redlining Manufacturing Data" on page 4-22.
- For information about the **Attachment Redline** tab, see "Redlining Attachments in the Agile Viewer" on page 10-15.

Viewing the Disposition of Parts in an ECO

ECOs have fields on the affected items table that specify what to do with existing parts affected by the change: **On Order**, **In Stock**, **Work In Progress**, **Finished Goods**, or (in the) **Field**.

Below are the typical **Change Disposition** values. These values or other values can be added to the **Change Disposition** list in Agile Administrator:

- **Use** — All parts continue to be used until inventory is exhausted.

- **Scrap** — All parts are to be scrapped; scrapping specifications may be required for some parts.
- **Rework** — All parts are to be modified based on attached instructions.
- **N/A** — The parts are not affected.

Adding an Item to the Affected Items Tab

You can use the **Add** button to add an item to the **Affected Items** tab.

This section contains the following topics:

- Special Considerations for ECOs
- Special Considerations for MCOs

Note You cannot add an item that is locked by another user. An item is locked for two reasons:

A) A user has made modifications to the item, but has not yet saved those modifications. Once the item is saved, it is unlocked.

B) A Windows client user has the item open and in the BOM table view. When the item is switched to the tree view, and any modifications to the item are saved, the item is unlocked.

To add an item to the Affected Items tab:

1. Open a change, and display the **Affected Items** tab.
2. Check the box in front of an item; the new item is added directly below it. Click the **Add** button.

   The Add Affected Item(s) wizard appears.
3. You can search to find an existing item or select **Create** to create a new one. Follow the onscreen instructions as they appear.

   For general search information, see "Finding Agile Objects" on page 2-7.
4. Click **Finish** when you have selected an item in the wizard and are ready to add it.

If you want to add an item that does not exist, you can select **Create** on the Add page to create the item. See "Creating an Item Using Add" on page 3-16.

Special Considerations for ECOs

The following actions apply only to ECO changes and occur after you finish selecting the item to add.

- If you are adding a released item that has BOM data or manufacturing data, Agile displays the BOM data, manufacturing data, and attachments for the item on the **Redlines** page. Click the appropriate tab on the **Redlines** page to redline the item's BOM or manufacturing data or attachments.
- If you are adding a released item that has changes pending against it, Agile tells you that the item has pending changes. On the **Redlines** page, click the appropriate tab to redline either the item's BOM or manufacturing data or attachments.

To finish the process of adding an item to the ECO **Affected Items** tab, complete the remaining fields.

Fields Required to Release an ECO

Required fields are defined for each status in the workflow. Use the audit feature to determine if all the required fields have been filled in. See "Auditing Changes" on page 6-29.

In addition to the required fields defined in the workflow, the following **Affected Items** tab fields must always be completed before Agile will release the ECO:

- **New Rev**
- **Item Number**

Note The **Item Number** field is completed automatically when you add the item to the **Affected Items** tab.

To complete the fields required to release an ECO:

In the **New Rev** field, type the new revision number.

If you leave the **New Rev** field blank, Agile places a question mark (?) in the **Rev** field of the item.

You can't release an ECO with a question mark in the **Rev** field.

Note Other tabs may also have required fields that must be completed. The specific fields on your system may vary, depending on the workflow settings. Use the **Audit Release** command on the **Actions** menu to verify that all required fields have been completed. See "Releasing Changes" on page 6-53.

You cannot change the **New Rev**, **Change Function**, and **Lifecycle Phase** fields of the **Affected Items** tab on a released change, even if you have the appropriate privileges to modify released changes. However, you can use an MCO to modify the lifecycle phase of an item without changing its revision level. See "Redlining through MCOs" on page 6-59 for more information.

Special Considerations for MCOs

To finish the process of adding an item to the MCO **Affected Items** tab, complete the remaining fields.

This applies only to MCO changes and occurs when you finish selecting the item to add to the **Affected Items** tab.

If you are adding a released item that has manufacturing data, Agile displays the manufacturing data for the item on the **Redlines** page. Redlining manufacturing data is explained in "Modifying Manufacturing Data from the Redlines Page" on page 4-18.

Fields Required to Release an MCO

In addition to the required fields defined in the workflow, the **Item Number** field on the **Affected Items** tab must be completed before Agile will release the MCO. This field is completed automatically when you add items to the **Affected Items** tab.

Note Other tabs also have required fields that must be completed. The specific fields on your system may vary, depending on the workflow settings. Use the **Audit Release** command on the **Actions** menu to verify that all required fields have been completed. See "Releasing Changes" on page 6-53.

Removing an Item from the Affected Items Tab

When you delete an item from the **Affected Items** tab, any attachments added to the item under the pending revision defined in that change are lost. The only exception is when the item has never been released. If there is only one change pending against the item, and you delete the item from that change, the item reverts to a preliminary item with no changes against it, and any attachments added under that last change are moved to the preliminary version of the item.

To remove items from the Affected Items tab:

1. Check the box for each item that you want to delete.
2. Click the **Delete** button.

Caution! Be sure to use the **Delete** button on the **Affected Items** tab to remove items from that tab. If you use the **Delete** command on the **Actions** menu, deletes the *entire change*.

Editing a Row in the Affected Items Tab

To edit the affected items information:

1. Check the box for each row that you want to edit.
2. Click **Edit**. Text boxes appear in the editable columns.
3. Make any changes, then click **Save** to save the changes, or click **Cancel** to cancel the changes.



CHAPTER 10
Attachments

This chapter covers working with the Attachments tab. It includes these topics:

- *Attachments Tab*
- *Attachment Operations*
- *Adding Attachments*
- *Editing Attachment Descriptions and Custom Fields*
- *Deleting Attachments*
- *Getting Files*
- *Checking Out and Checking In Attachments*
- *Switching between Versions of Attachments*
- *Viewing Attachments in the Agile Viewer*
- *Comparing Attachments*
- *Redlining Attachments in the Agile Viewer*
- *Printing Attached Files*
- *Configuring File Type Associations for Opening Attachments in Agile*

Note The maximum size of an attachment in Agile is by default 100MB. You can change this value in Agile Administrator 2006.

Attachments Tab

This section includes the following topics:

- About Attachments
- Buttons on the Attachments Tab

About Attachments

Files and URLs that describe an object (item, change, manufacturer, or manufacturer part) can be placed on the **Attachments** tab.

Attached files can be:

- Drawing files or scanned image files in viewable formats
- Files such as documents, non-viewable files, compressed (ZIP) files, and so on

All objects (items, changes, manufacturers, and manufacturer parts) have an **Attachments** tab. You can use the **Attachments** tab to:

- Add files and URLs as attachments
- Print attached files
- View an image of a file in the Agile Viewer
- Open a file in its native application
- "Get" a copy of a file, place it in a folder of your choice, and then view it in its native application or viewer when you want
- Check files into and out of the attachment vault
- Show previous versions of the file
- Delete an attachment from an object
- Incorporate (lock) attachments into an item

To display the Attachments tab:

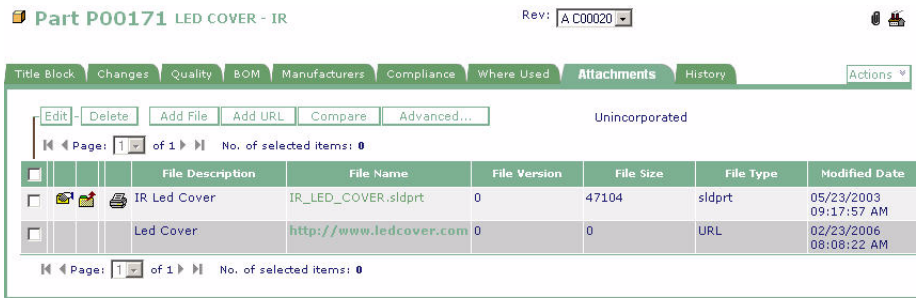
1. Open any part, document, manufacturing object, or change.
2. Click the **Attachments** tab to display it.

You need the appropriate privileges to add or remove files on the **Attachments** tab. The buttons on the **Attachments** tab are enabled or disabled, depending on your privileges or property settings in Agile Administrator. If you have questions about your privileges, contact your Agile administrator.

For more information about the **Attachments** tab buttons and icons, see "Buttons on the Attachments Tab" on page 10-3.

A completed **Attachments** tab for an item is shown in the next figure. The **Attachments** tab includes a versions table, which allows you to view previous versions of an attachment. See "Switching between Versions of Attachments" on page 10-14 for more information.

Figure 10-1: Attachments Tab of an Item



Note Your Agile administrator may have added more fields to this tab.

To open an attachment, click its filename:

- If the file is a supported file format (see the *Agile Administrator User's Guide* for a list of supported file formats), the file opens in the Agile Viewer. With appropriate privileges, you can use all the Agile Viewer features, as described in "Viewing Attachments in the Agile Viewer" on page 10-14.
- If the file is not a supported file format, the file opens in its native application.

You can search for objects by their attachments. For more information, see Chapter 12, "Searching for Objects."

Buttons on the Attachments Tab

You need the appropriate privileges to add or remove files on the **Attachments** tab. The buttons on the **Attachments** tab are enabled or disabled, depending on your privileges or property settings in Agile Administrator. "Attachment Operations" on page 10-5 addresses some of these dependencies. If you have questions about your privileges, contact your Agile administrator.

If the attachment buttons are disabled, check for the following:

- Is the item released or incorporated? Then you cannot edit that item unless you use a change to do so.
- Are you viewing an MCO revision? Only MCO revisions that meet certain criteria have attachment operations enabled. See "File Operations on MCO Revisions" on page 10-6.
- Have you been granted sufficient privileges? Check with your Agile administrator. You may be granted certain privileges for some files but not for others.

The buttons in the following table are available to users with the required privileges on item, change, and manufacturing object pages.

Table 10-1: Attachments tab buttons

Button	Description
Edit	The **Edit** button lets you edit the **File Description** field of the selected attachment.
Delete	The **Delete** button removes all checked files from the **Attachments** tab. You can delete all versions or just the current version. The **Delete** button is disabled if the item is incorporated or a file is checked out.
Add File	The **Add** button lets you locate a file and attach it to the **Attachments** tab.
Add URL	The **Add URL** button opens the Add URL window, which lets you attach a URL as a file.
Compare	The **Compare** button lets you compare two attachments of the same file type.
Advanced...	The **Advanced** button lets you add a new attachment or search for an existing attachment in another object and add it.
	The **Get** button places a copy of the selected file in the folder or location of your choice. This copy is in the format of the native application.
	The **Check Out** button locks the selected file until you check it in again. When the file is locked, it cannot be checked out by another user. This button is disabled when the item is incorporated. When an attachment is checked out, a ✔ appears in front of it.
	The **Check In** button lets you return a checked-out copy of the selected file to the attachments vault. This replaces the previous version with the edited version, if edits have been made. The file is then unlocked and can be checked out again. Previous versions are accessible through the versions table.

Table 10-1: Attachments tab buttons

	The **Cancel Checkout** button lets you cancel a checkout. It unlocks the selected file after it has been checked out so that it can be checked out again. The file is not changed. Only the user who checked out the file and the change analyst can cancel the checkout.
	The **Print** button lets you print the selected attachment file. The Agile Viewer is started in a separate browser window and begins the printing process.

Attachment Operations

Attachment operations apply to the specific revision of the item against which the action is being taken. Attachment operations include adding files, checking in files, checking out files, canceling checkouts, incorporating and unincorporating attachments, getting files, and opening files. For information about your privileges for attachment operations, contact your Agile administrator.

Certain situations affect access to attachment operations. This section includes the following topics:

- Attachment Types
- CopyFilesToRev SmartRule
- File Operations on MCO Revisions

Attachment Types

Your Agile administrator may have enabled the **File Type** column in the attachments table. Assigning a type to an attachment can determine which users have access to that attachment. For example, if the Agile administrator has added an attachment type called Internal Only, and you assign that type to an attachment, suppliers and contractors outside your company won't be able to access the file.

If you see a **File Type** column in the attachments table, contact your Agile administrator to find out how to use that field at your company.

If you see an attachment listed in the table, but you can't access it, it may be because you don't have privileges to access that type of attachment.

CopyFilesToRev SmartRule

If your Agile administrator has set the CopyFilesToRev SmartRule to Allow, when you create an ECO against a released item, all the attachments on the released item are copied to the new (pending) revision. This also applies if CopyFilesToRev is set to Warning, and you answer Yes to the warning prompt. The SmartRule applies at the time of the creation of the ECO.

For example, if you create an ECO against part number 456 Rev C (thus creating a pending revision D), all the files attached to Rev C are copied into pending Rev D. Any files added to the **Attachments** tab of Rev C after the creation of the ECO are not copied to pending Rev D.

Note This SmartRule does not affect MCO revisions because MCOs do not create a separate new revision.

File Operations on MCO Revisions

In releases of Agile Anywhere prior to Release 7, if an item had an MCO revision (that is, a revision created by an MCO), you could not perform most of the operations on that item's **Attachments** tab. Now, under certain conditions, you can perform attachment operations on an MCO revision of an item. Here are the guidelines:

- When an ECO is created against an item *before* any MCOs are created, attachment operations are not available on any MCO revisions of that item.
- When there is no ECO, and all MCOs are pending, attachment operations are available only on the first created MCO revision. All the MCO revisions have the same attachments.
- When an item is initially released by an MCO, attachment operations are available on the revision of the item created by the released MCO. This MCO revision retains its own copies of the attachments.
- All other MCOs refer to either the latest released ECO, the initially released MCO, or the pending ECO (whichever is most recent) for the attached files.

Adding Attachments

Each time you add a file to the Agile Advantage system, it is copied into the vault as an independent vault file with a unique numeric vault filename. This is true even if you add the same file as an attachment to several different objects.

This section includes the following topics:

- Adding Files
- Adding URLs

You must have the appropriate privileges to add attachments to the **Attachments** tab. If you have questions about your privileges, contact your Agile administrator.

Note If there is a pending or released MCO against that revision of the item, depending on which MCO revision you select, you may not be able to add files to the **Attachments** tab. See "File Operations on MCO Revisions" above for more information. You can, however, add files to non-MCO revisions of the item.

Adding Files

Note Because the AgileWeb client does not support adding multiple-file attachments, you must add files one file at a time. If you want to add multiple-file attachments, use the Agile Windows client. For more information, refer to the *Agile Advantage 2006 Windows Client User Guide*.

To add files to the Attachments tab in Agile:

1. Open an object.
2. Click the **Attachments** tab to display it.
3. Click the **Add File** button.

   The Add File window appears.
4. Locate and select the file you want to add. You can select electronic files on a local drive or on your network.
5. Add a description.

   If you do not enter a description, Agile uses a placeholder description, [No Description]; however, you can add or edit a description at any time. If you add files with the same filename, the descriptions should be different for each file.
6. Click **OK**. The selected file is added to the Attachments tab and placed in the attachment vault.

Note In Agile, if the Retain Local Files property in Administrator is set to Warning or Delete, the local copy of the file is deleted without warning when you add a file. The Warning setting applies to the Agile Windows client only.

Adding URLs

You can include a URL (Internet address) as an attachment. URL attachments point to the Internet site; they are not, themselves, document attachments.

Note Because Agile does not check each URL entry for accuracy, you may want to go to the Internet site you want to point to and copy the URL directly from your browser window to be sure it is correct. To paste the URL, press Ctrl+v.

To attach a URL as a file:

1. On the **Attachments** tab of the object, click the **Add URL** button.

   The Add URL window appears.
2. Type the URL address in the **URL** field.
3. If you want, click **preview** to view the URL.
4. Enter a description.
5. Click **OK**.

Sharing Attachment

You can search for an attachment on another item and add it as an attachment. This enables you to save vault space when you have more than one item referencing the same file.

Note The file operations related to this file remain independent. Adding a new file version removes the link to shared attachment.

To share attachments between items:

1. Open the **Attachments** tab of a Part or Document.
2. Select the **Advanced** 

button.
   The **Add Attachment Wizard (Identify Attachment)** page appears.
3. Check the **Advanced Search** option under **Search for Existing Attachment**.

4 Click the **Next** button.
The **Add Attachment Wizard (Advanced Search)** page appears.

5 Add the search criteria and click **Next**.
The **Add Attachment Wizard (Search Results)** page displays the item(s) and the file name(s) that match the criteria.

6 Select the file(s) you want to share and click the **Finish** button.
The wizard closes and the **Attachments** tab is now populated.

Editing Attachment Descriptions and Custom Fields

You can edit the attachment description and any custom fields defined by your Agile administrator. You cannot edit Agile-defined attachment fields such as **File Version** and **File Name**.

You must have the appropriate privileges to edit the **Description** field of a file on the **Attachments** tab. You can also edit any custom fields that your Agile administrator may have added. If you have questions about your privileges, contact your Agile administrator.

To edit the description or a custom field of an attached file:

1 Check the box in front of the rows that you want to edit.

2 Click **Edit**.

3 Edit the appropriate fields, then click **Save**.

Deleting Attachments

When you delete an attachment, Agile removes the attached file from the attachments vault. The outside file at its original location, from which the Agile attachment was made, is untouched; only the Agile copy in the vault is deleted.

Each time you use an outside file to create an attachment, it is copied into the vault as an independent vault file with a unique numeric vault filename. This is true even if you use the same outside file as an attachment to several different objects. For this reason, you can delete the attached copy from one object without affecting any of the other attached copies.

You must have the appropriate privileges to delete attachments from the **Attachments** tab. If you have questions about your privileges, contact your Agile administrator.

Note You cannot delete an attachment that is checked out. Either the user who checked it out or the change analyst must check it back in first.

Similarly, you cannot delete an attachment from an item that has been incorporated. The item must first be unincorporated by someone with the required privilege.

To delete attached files:

1. On the **Attachments** tab of the object, check the box in front of the files that you want to delete.
2. Click the **Delete** button.
3. If there are multiple versions of the attachment, specify whether you want to delete all versions or the current version only.
4. Click **OK** when the confirmation message appears.

Caution! Be sure to use the **Delete** button on the **Attachments** tab.

Do not use the **Delete** command on the **Actions** menu. This deletes the *entire object you're working with*, not just the attachment.

Securing and Vaulting Attachments

Files stored in the vault by the Agile system are generally to be accessed only via the Agile client applications. If the files are accessed directly from the vault and modified, that would imply that the application's integrity has been violated.

So, in order to alert users of unauthorized access to the files, file validation is performed to determine if the file was modified or changed outside of the Agile system. If the integrity test fails, then the user gets an error message describing the failure to access the file and to contact the Agile administrator. A script is available for the Agile administrator to rectify this problem.

Getting Files

You can copy a file to the folder of your choice. This is called "getting" a file. You can get as many copies as you like, but if you want to change the attachment, you must check it out, get it, and check it in again.

Several users can get the same attachment simultaneously. You can get files that are checked out. Also, you can get an attachment even though the application used to create that file is not loaded on your computer.

You must have the appropriate privileges to get a file from the **Attachments** tab. If you have questions about your privileges, contact your Agile administrator.

Note When you get an attached file, the date stamp on your copy of the file reflects the date that you got the file, not the date that the file was attached or saved.

To get an attachment in Agile:

1. Click the **Get** button in front of the file on the **Attachments** tab. The **File Download** dialog box appears.
2. Save the file to disk, specifying the folder where you want to place the copy. Agile copies the attachment to the selected folder.

Checking Out and Checking In Attachments

You must have the appropriate privileges to check out and check in an attachment and to cancel a checkout. If you have questions about your privileges, contact your Agile administrator.

This section includes the following topics:

- Checking Out Attached Files
- Checking In Attached Files
- Canceling Checkouts

Note You cannot check out or check in multiple-file attachments using the Agile Web client. If you want to check out or check in multiple-file attachments, use the Agile Windows Client. For more information, refer to the *Agile Advantage 2006 Windows Client User Guide*.

Checking Out Attached Files

When you check out an attachment, Agile locks the file. You can edit it, but no one else can, until you either check it in again or cancel the checkout.

After you check out an attachment, you must get the attachment so you can edit it with the appropriate application. For details, see the previous section, "Getting Files." This places a copy of the attachment in the folder of your choice. Then, you can edit it with a copy of the application that created it. Checked-out attachments remain on the **Attachments** tab, but are read-only for everyone else until you check them in again or cancel the checkout.

By default, only you, a change analyst, or a component engineer can check in an attachment that you checked out, or cancel a checkout. However, your Agile administrator can alter the privilege masks so that anyone can check in any attachment.

If you placed the attachment on the network or in a shared drive or folder, you can check in the attachment from any computer that provides access to that drive or folder. Attachments put into a folder that is not a shared folder must be checked in from that same computer. See your Microsoft documentation for more information about shared folders.

You cannot check out an attachment from an item that has been incorporated.

To check out an attachment:

1. Display the **Attachments** tab of an item or change.
2. Click the **Check Out** button  in front of the attachment that you want to check out.

   The file is checked out; a red checkmark appears before it, and the **Cancel Checkout** button and **Check In** button also appear.
3. Click the **Get** button  to copy the locked file to a folder where you can edit it. The **File Download** dialog box appears.
4. Save the file to disk, specifying the folder where you want to place the copy.

   Agile copies the attachment to the selected folder.

   Now you can edit the file in that folder with the application used to create it. It remains on the **Attachments** tab, but is read-only for everyone else until you check it in again.

   Your name appears in the **Checkout User** column. The date and checkout location appear in the **Checkout Date** and **Checkout Folder** columns.

   Note Because URL attachments are pointers to the Internet site, and not document attachments, you cannot check out a URL. Click the URL to go to that "attached" reference.

Checking In Attached Files

When you have finished editing a checked-out attachment, you can check it in again. This makes it available for editing to others with sufficient privileges. You can check in the attachment from any computer.

A checked-out attachment can be checked in only by the user who checked it out, or by a change analyst or a user with the necessary privileges. For information about checking files out and in from different computers, see the preceding section, "Checking Out Attached Files."

Checking in an attachment increases the version number of the attachment. The initial version of any file added to the **Attachments** tab is 0.

When you check in a file, if you have placed a copy of that file in a folder (using Get), that file remains in the folder until you delete it manually. This behavior is different from the Agile Advantage Windows client, which can delete the file automatically.

To check in a file:

1. Display the **Attachments** tab of an item or change.
2. Click the **Check In** button  in front of the attachment that you want to check in.
   The information disappears from the **Checkout User**, **Checkout Date**, and **Checkout Folder** columns. The attachment is checked in and is now available to be checked out by others with sufficient privileges.

Canceling Checkouts

When you wish to discard edits to a file you checked out, you can cancel the checkout.

A checkout can be canceled only by the user who checked out the attachment, or by a change analyst or a user with the necessary privileges. If you have questions about your privileges, contact your Agile administrator.

When you cancel a checkout, if you also "got" the attachment, a copy of the attachment remains in the checkout folder you selected, but the original is once more available to be checked out from the **Attachments** tab. Any edits you make to the remaining copy of the attachment do *not* appear in the Agile attachment.

To cancel a checkout:

1. Display the **Attachments** tab on an object page.
2. Click the **Cancel Check Out** button  in front of the attachment that you want to check out.

A copy of the attachment remains in the checkout folder you selected, but the original is once more available to be checked out from the **Attachments** tab. Any edits you make to the remaining copy of the attachment do *not* appear in the Agile attachment.

Switching between Versions of Attachments

When you display the **Attachments** tab, the latest version of each attachment is listed. You can also access other existing versions and open or get them.

To switch between versions of attachments:

1. On the **Attachments** tab, select the attachment that you want to access.
2. The **File Version** field lists the versions available. Select the version that you want to access.
3. You can either open or get that version of the file.

Viewing Attachments in the Agile Viewer

With appropriate privileges, you can view files in the Agile Viewer, redline them, and print them with datestamps, timestamps, and other banner and watermark information.

Note If your file type is not supported by the Agile Viewer, or the Agile database is stored on a computer that uses a Chinese, Hebrew, or Swedish operating system, you cannot use the Agile Viewer. However, you can open attached files in their associated application. If you have questions about Agile Viewer availability, ask your Agile administrator or contact the Agile support Web site; see "Agile Online Support" on page iv. For a list of supported file formats, see the *Agile Administrator 2006 User Guide*, or contact your Agile administrator.

To view an attached file using the Agile Viewer:

1. Display the **Attachments** tab of the object.
2. Click the name of an attachment.

   When you click the filename link of an attachment, the results are as follows:

   - If the attachment is a single file, and the file is viewable with Agile's viewer, the attachment opens in the viewer.

- If the attachment is a single file, and the file is **not** viewable with Agile's viewer, the attachment opens in the native application, if it is installed on your computer.
- If the attachment is a compound file (an attachment made up of multiple files), and at least one of the files is viewable with Agile's viewer, the viewable attachments open in the viewer.
- If the attachment is a compound file, and **none** of the files is viewable with Agile's viewer, the filename is not a link. Click the **Get** button  to get a copy of the file.

Comparing Attachments

You can directly compare *two* attachment files (of the *same* file type) that belong to the same object (both attachment files belong to the same attachment list under the **Attachments** tab).

Note To modify the compare feature's parameters and supported file formats, see the *Agile Administrator 2006 for Agile Advantage User Guide*.

To compare two file attachments that belong to the same object:

1 In the **Attachments** tab of the object, check the two appropriate attachment files.

Note You can only compare *two* files. If you check one or more than two attachment files, an error message appears. In addition the two selected attachment files must be of the *same* file type.

Note Only image formats are supported for the Compare Function. Other formats such as .doc, .txt, .xls, and so forth are not.

2 Click the **Compare** Compare button.
The **Comparison window** appears.

3 Agile opens the Agile Viewer and displays the content of both selected file attachments with the **Comparison Result** window. The comparison result identifies the differences in the two selected similar files and reports the differences in a third pane view.

Redlining Attachments in the Agile Viewer

With the Agile Viewer, you can add redline layers (or markup files) to item attachments.

To redline an item's attachment files, that item must be on the **Affected Items** tab of a change order. From the change order, you can open the **Attachment Redlines** tab and mark up the attachment files, using the Agile Viewer.

Attachment redlines follow these rules:

- Although all Agile objects can have attachments, only item attachments can be redlined. That is, the attachments of only parts and documents can be redlined.
- Item attachments can be redlined only though a change order (or ECO). You cannot use MCOs, deviations, stop ships, or change requests to redline attachments.
- You must have appropriate privileges to redline attachments.

To redline an item's attachment files:

1. Add the item to the **Affected Items** tab of a change order (ECO). See "Adding an Item to the Affected Items Tab" on page 9-6.
2. On the **Affected Items** tab, click the  icon to open the Redlines page.
3. On the **Attachment Redline** tab, click the name of the attachment file you want to redline.
   If the file type is supported, the Agile Viewer opens in a browser window. The selected file appears.

   Note It can take a while for the Agile Viewer to load.
4. In the Agile Viewer, click the **Markup** button.
   The redline tools are displayed on the Agile Viewer page.

For detailed information about using the markup feature in the Agile Viewer, see the *Agile Viewer User's Guide*.

To access the Agile Viewer User's Guide:

1. Choose **Help | Contents** from the Agile Viewer menu bar.
2. Click the displayed link to open the *Agile Viewer User's Guide*.

Printing Attached Files

You must have the appropriate privileges to print an attached file. If you have questions about your privileges, contact your Agile administrator.

You can use several methods to print attached files:

- Click the **Print** button in front of the attachment that you want to print. The Agile Viewer opens in a separate browser window, and you can print the file from the viewer.

  When you print from within the Agile Viewer, watermarks and banners can appear in addition to the contents of the attached file. For more information, see "About Banners and Watermarks on the Printed Image" on page 10-17.

- Open the file in its native application, then use the native application's print functions to print the file.

  To print a file from its native application, that application must be loaded on your computer before you can print the file. Follow the usual printing procedures as given in the application's documentation.

To print a file on the Attachments tab using the Agile Viewer:

1. Display the **Attachments** tab of an object.
2. Click the **Print** button  in front of the attachment you want to print.
3. If the selected attachment has redline layers, a dialog box appears, asking if you want to print the redline changes to the files. Choose:
   - **Yes** to print the file with the redline layers.
   - **No** to print the original file with no redline layers.
4. If the file type is supported by the Agile Viewer, the viewer opens and begins the printing process. Follow the instructions in the displayed dialog boxes to complete the printing process.

   Otherwise, Agile starts the file's native application and opens the file so you can print it using that application's printing commands. Choose the **Print** command for that application.

About Banners and Watermarks on the Printed Image

When printed through the Agile Viewer, the printed image has a banner above and below the image. The banner has six fields: top left, top center, top right, bottom left, bottom center, and bottom right.

The banner labels and contents for each object class are set in Agile Administrator.

In addition, the Agile administrator can choose to include a printed watermark on the printed image.

If you have questions about the banner and watermark settings, ask your Agile administrator.

Configuring File Type Associations for Opening Attachments in Agile

When you're using the Agile Web client, you can open attached files in your browser. This feature works for those file types for which you have the corresponding applications installed, and when the file association is set up for your browser between those applications and file types. Agile relies on the file type associations, which are set up in the operating system, to open the appropriate application with which to open an attachment.

Your system administrator can help you determine the file type associations that need to be set up in your system to handle the file types you are working with.

Some examples of common file types and their associations are shown in the following table:

Table 10-2: Common file types and their associated applications

File type	File extension	Application often associated
Microsoft Word document	DOC	Microsoft Word for Windows
Microsoft Excel file	XLS	Microsoft Excel for Windows
JPEG graphic	JPEG, JPG	Default browser
GIF graphic	GIF	Default browser
HTML	HTML, HTM	Default browser
PDF	PDF	Adobe Acrobat Reader



CHAPTER 11
Agile Packages

Agile packages are objects that contain sets of documentation used to describe other objects tracked in Agile. They differ from PDX packages.

This chapter describes Agile packages and how to work with them. The main sections include:

- *Intended Audience*
- *The Agile Package Server Component*
- *Who Uses Agile Package Objects?*
- *What are Agile Package Objects?*
- *The Agile Package Page*
- *Package Workflow*
- *Partners and Program Managers*
- *Working with Agile Package Objects*
- *Searching for Agile Packages*
- *Final Status of Agile Packages*
- *Workflow Features and Licenses*

Intended Audience

This chapter assumes that you are an Agile user who works with Agile package objects. You may be a user who creates and submits packages, an approver or an observer of packages that are routed for approval, or a program manager, who is like a change analyst who works with packages.

Note For detailed information about roles, see the *Agile Administrator User's Guide*.

The Agile Package Server Component

The Agile Package Server is an optional server component of Agile Advantage that provides additional Agile Advantage functions.

The Agile Package Server provides an additional object, the Agile package. To use and search for Agile packages, your company must have a license to use packages, and you must have the appropriate privileges.

Who Uses Agile Package Objects?

Agile package objects are available to Agile users with the appropriate user license, roles, and privileges. The program manager uses Agile to oversee the routing and approval of Agile Package objects. Partners typically use Agile's Web interface to create and submit Agile Packages.

What are Agile Package Objects?

An Agile package is a package of files and documents that may be used to describe a proposed product.

An Agile package is different from other Agile objects because it has no relationship to any other Agile object. It does not have a revision level, you cannot write changes against it, it has no **Manufacturers** tab, and it has no Bill of Material. It is simply a package of files and documents describing a proposed product.

Agile package objects are similar to change objects because Agile packages have workflows that determine the sequence of statuses an Agile package follows as it goes through the approval cycle. All change objects have affected items. In contrast, Agile package objects do *not* have affected items.

In the same way that the Change classes include the subclasses ECO, ECR, and MCO, the Package class may include subclasses, as defined by your Agile administrator.

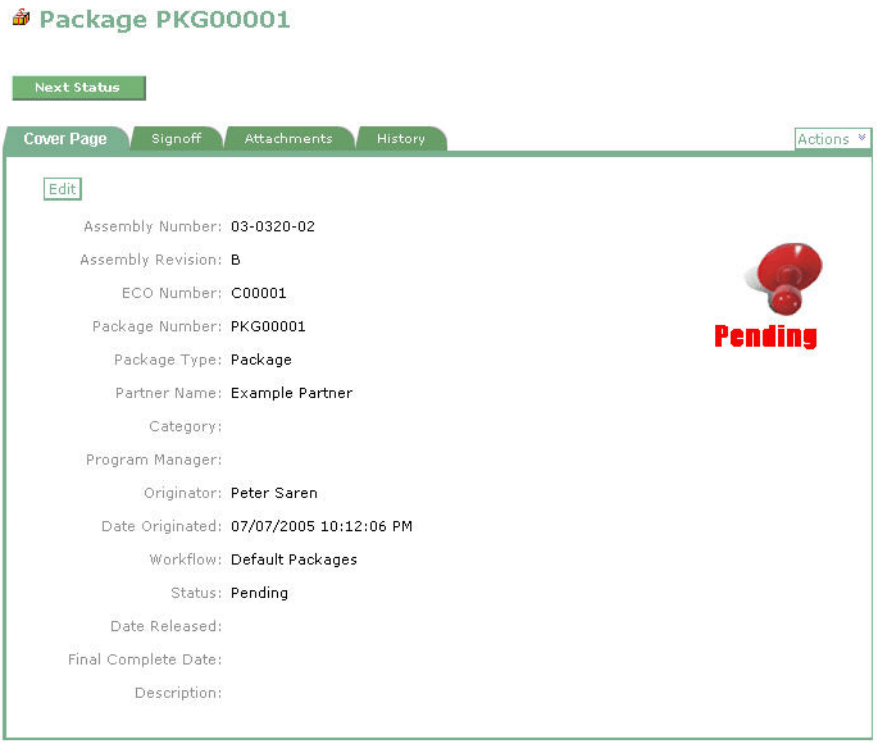
The Agile Package Page

This section contains the following topics:

- Package Tabs
- Status of an Agile Package

Like any other Agile object, an Agile package object is displayed with tabs on a page, as shown in the following figure.

Figure 11-1: Agile Package Cover Page Tab



The Agile package page can have the following two icons in the upper left and right corners.



This icon indicates that the object type is an Agile package.



This icon is visible if the object has any attached images or files. You can click this icon to display the **Attachments** tab.

Package Tabs

This section contains the following topics:

- Cover Page Tab
- Page Two Section
- Signoff Tab
- Attachments Tab
- History Tab

The following table describes the tabs and some of the fields for Agile packages.

Table 11-1: Package Tabs

Package Tab Name	Tab Fields include	Tab Information includes
Cover Page (See "Cover Page Tab" on page 11-5.)	Assembly Number, Assembly Revision, ECO Number, Package Type, Package Number, Originator, Partner Name, Date Released, Description, Workflow, Date Originated, Status, Program Manager, Category, Final Complete Date	General information about the Agile package.
Page Two (optional)	(Agile Administrator defines)	Unique fields defined by the Agile administrator.
Signoff	Workflow, Workflow Status, Reviewer, Required, Action, Signoff User, Status Changed By, Local Client Time, Signoff Comments	Package approvers and observers, and the results of their reviewing of the Agile package. See "Signoff Tab" on page 6-12.
Attachments	File Description, File Name, File Version, file Size, File Type, Modified Date, Last View Date, Checkout User, Checkout Date, Checkout Folder	Attached files. Specific package file types may be defined by the Agile administrator. For more information, see Chapter 10, "Attachments."
History	Status, Next Status, Action, User, Local Client Time, Affected Object, Find Number, Details, Comments	Shows actions taken on the Agile package—for example, when attachments were added and removed. See "History Tab" on page 6-15.

Cover Page Tab

The Agile package **Cover Page** tab includes some basic information about the proposed product, and the **Attachments** tab includes files and images describing the proposed product. The attachments might include specifications, schematics, assembly drawings, test procedures, or any other file type required. The program manager routes an Agile package for review and signoff.

These buttons are available on the Agile package **Cover Page** tab:

- The **Edit** button (available when you're in view mode) lets you update the package.
- The **Save** button (available when you're on an Edit page) saves your edits.
- The **Cancel** button (available when you're on an Edit page) "undoes" or cancels any edits you have made since the last save.

The following table describes the fields on the **Cover Page** tab.

Table 11-2: Package Cover Page tab

Cover Page field	Completed	Contains
Assembly Number	Manually.	Number of the proposed assembly.
Assembly Revision	Manually.	Revision of the proposed assembly.
ECO Number	Manually.	An ECO number associated with the assembly.
Package Number	Usually automatically; may be an autonumber or a manually entered number.	Package number assigned to the Agile package when it is created.
Package Type	Usually manually, but may contain a default.	Drop-down list of package types defined by the Agile administrator.
Partner Name	Usually manually, but may contain a default.	Name of the partner creating the Agile package (can be selected from a drop-down list).
Category	Usually automatically, when created (with default set by the Agile administrator).	Drop-down list of categories defined by the Agile administrator.
Program Manager	Automatically, if defined in workflow; otherwise selected manually from list.	Name of the program manager assigned to the partner in the **Partner Name** field.

Table 11-2: Package Cover Page tab (continued)

Cover Page field	Completed	Contains
Originator	Usually manually, but may contain a default.	The user who created the Agile package (can be selected from a drop-down list).
Date Originated	Usually automatically, when created (with default set by the Agile administrator).	The date the Agile package was created.
Workflow	Automatically (if only one workflow applies to the Agile package), when the Agile package is moved to the next status from the Unassigned status. If more than one workflow applies to the Agile package, the workflow is selected manually; the workflow selection can be changed as long as the Agile package is in the Pending type status.	The name of the workflow being used to move the Agile package through the approval process.
Status	Automatically, when created; updated as package moves through the assigned workflow.	The status of the Agile package. See "Status of an Agile Package" on page 11-8. If no workflow is selected, this field is Unassigned.
Date Released	Automatically.	Date the Agile package was released.
Final Complete Date	Automatically.	Date the package was switched to the Complete type status.
Description	Manually, but can contain a default defined by the Agile administrator.	Up to 1023 characters, including spaces and carriage returns (which count as two spaces).

Page Two Section

Your Agile administrator can add an optional custom section to the Cover Page of package objects. This section may have a different name on your system if your Agile administrator renamed it.

The **Page Two** section contains the customized fields your Agile administrator defined and named.

Signoff Tab

The **Signoff** tab lists the users who are assigned to either approve or observe the proposed package, the actions taken by the approvers, the date and time of each action, and any comments made by the approvers and observers. The **Signoff** tab of an Agile package is identical to the **Signoff** tab of a change. See "Signoff Tab" on page 6-12.

Either approvers and observers are automatically assigned by the workflow, or they are assigned when the program manager routes the Agile package for approval. See "Switching Changes from One Status to Another Status" on page 6-33.

Attachments Tab

The **Attachments** tab lists the files that have been attached to the Agile package. The Agile administrator may define specific types of files to include on the **Attachments** tab. For information about working with attachments, see Chapter 10, "Attachments."

History Tab

The **History** tab shows a summary of actions taken against the Agile package, including:

- The current status of the Agile package
- The next status of the Agile package
- A description of the action
- Which user took the action
- The date and time of the action
- The User Action Time (optional; see "User Action Timestamp" on page 6-14)
- Details of the action
- Comments made by users
- Users notified

The types of actions recorded are:

- Modify an attachment on the **Attachments** tab
- Add or delete approvers
- Approve and reject

- Change a field, any tab
- Change a status
- Autopromotion fails
- Change a subclass
- Comments
- Send
- Print

Status of an Agile Package

Agile's Web client uses a status stamp in the top right corner of the **Cover Page** tab to indicate the status of an Agile package. (See Figure 11-1.) Your Agile administrator defines the name of each status in each workflow.

Note Your Agile administrator may have created customized workflows and status stamps for your company. The following table shows the Default Packages workflow status stamps. See your Agile administrator if you have questions about status stamps.

Table 11-3: Lifecycle Status Stamps For Default Packages Workflow

Status stamp	Status name	Status definition
	Unassigned (No status type)	No workflow has been assigned to this package. The originator may still be developing the Agile package. No statuses are displayed on the **Signoff** tab.
	Pending (Pending status type)	The originator may still be developing the Agile package. The Agile package has not been submitted to the program manager.

Table 11-3: Lifecycle Status Stamps For Default Packages Workflow (continued)

Status stamp	Status name	Status definition
	Submitted (Submit status type)	The Agile package has been submitted to the program manager. (If the program manager switches a submitted package to the Pending status, the originator can modify the Agile package and submit it again.)
	Review (Review status type)	The Agile package has been routed for review and signoff.
	Accepted (Released status type)	The Agile package has been signed off by the approvers and has been released.
	Closed (Complete status type)	The Agile package is no longer used.
	Hold (Hold status type)	The Agile package has been placed on hold while the program manager gathers information.
	Canceled (Cancel status type)	The Agile package has been canceled due to a fundamental flaw or because one or more approvers have rejected it.

Package Workflow

Agile packages may have custom workflows, just as changes may have custom workflows. See “Agile Change Control Workflows” on page 6-20.

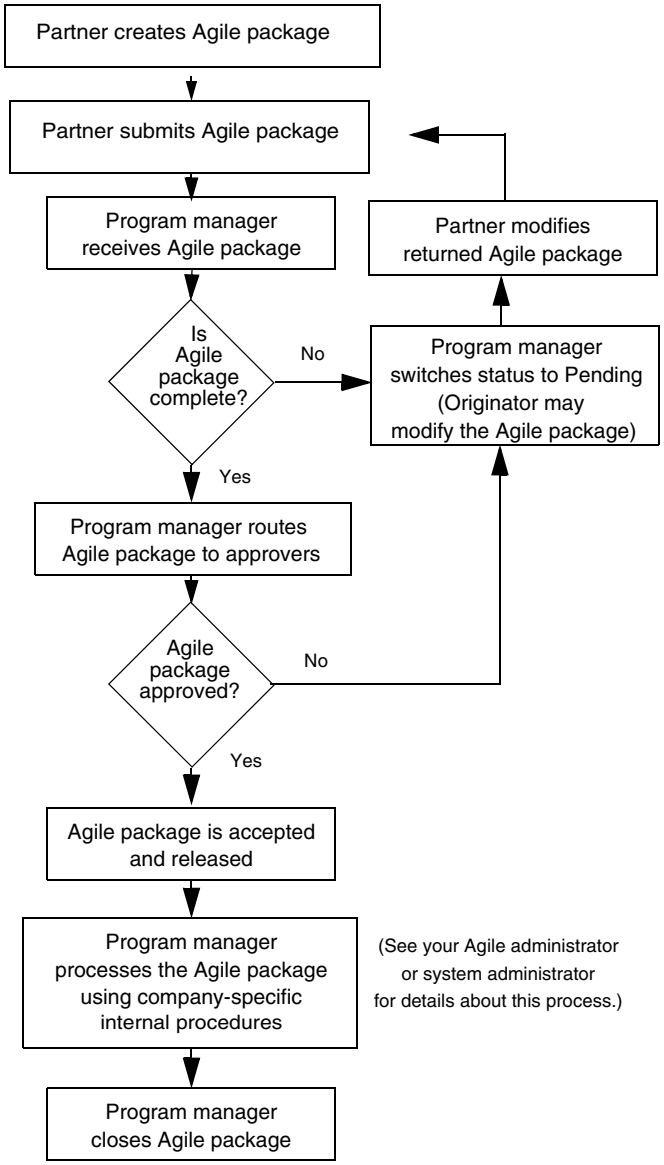
Agile packages are created by partners. Typically, partners are customers at other companies who use Agile to create Agile packages. The typical workflow of an Agile package is as follows:

1. A partner at another company uses Agile to create an Agile package.
2. When the Agile package is complete, the partner uses the Agile Web client to submit the Agile package to the program manager.
3. The program manager, using Agile, opens and reviews the Agile package. If the Agile package data is not complete, the program manager may return the Agile package to the partner for more information.
4. If the Agile package is complete, the program manager switches the Agile package to the next status in the workflow. Typically, the next status is a Review type status, which routes the Agile package for approval.
5. The approvers review the Agile package and either accept it or reject it.
6. When the Agile package is accepted by the approvers, depending on workflow settings, either the program manager accepts (releases) the Agile package, or the Agile package is autopromoted to the next status in the workflow and released.
7. The program manager processes the Agile package data according to unique company-specific procedures.
8. When the Agile package is processed and no longer used, the program manager closes the Agile package.

Note Your Agile administrator may define custom workflows for Agile packages. Custom workflows may have multiple Submit, Review, and Released type statuses. See "Example of a Customized Workflow" on page 6-25 for details.

The following diagram summarizes the typical workflow of an Agile package, using the **Default Packages** workflow.

Figure 11-2: Agile Package Workflow



Partners and Program Managers

The Agile administrator assigns the Partner role or Program Manager role to the appropriate Agile users. For detailed information about roles, see the *Agile Administrator 2006 User Guide.*

What is a Partner?

Partners are typically users at an EMS provider's customer site who create Agile packages of proposed products and submit them to your company for review and approval. However, an Agile user in your company with the appropriate privileges may also create and submit Agile packages.

What is a Program Manager?

The Agile administrator assigns specific partners to specific program managers. The role of a program manager is similar to that of a change analyst or component engineer. Program managers manage Agile packages throughout their workflow.

Working with Agile Package Objects

This section includes the following topics:

- Creating an Agile Package
- Submitting an Agile Package
- Approving and Rejecting an Agile Package

Creating an Agile Package

You can create Agile packages in Agile the same way you create any other Agile object, provided your company is licensed to use packages and you have the appropriate privileges.

To create an Agile package:

1. Choose **Create | Package.**
2. The **Create New Package** page appears.
3. Select a subclass for the Agile package.

4 Enter a number. You can click the **AutoNumber** button  to assign a number automatically.

5 Click **Next** to display the **Enter Cover Page Tab Data** page.

6 Enter appropriate **Cover Page** tab information.

7 When you have completed it, click **Next** to add attachments, or click **Finish** to create the package without attachments and without submitting it.
If you click **Next**, the **Add Attachments** page appears.

8 Add attachments as described in "Adding Attachments" on page 10-6.

9 Click **Next** for an opportunity to submit the completed package, or click **Finish** to create the package without submitting it.
If you click **Next**, the Save or Submit page appears.

10 Select whether to save the package without submitting it or to submit the package now, then click **Finish**.
If you choose to submit the package, the **Change Status to Submitted** page appears.

11 Enter the name of at least one program manager to notify and the names of any other users who should receive email notification. Separate the names with semicolons. Or click  to open the address book.

12 Enter any comments, and click **OK**.

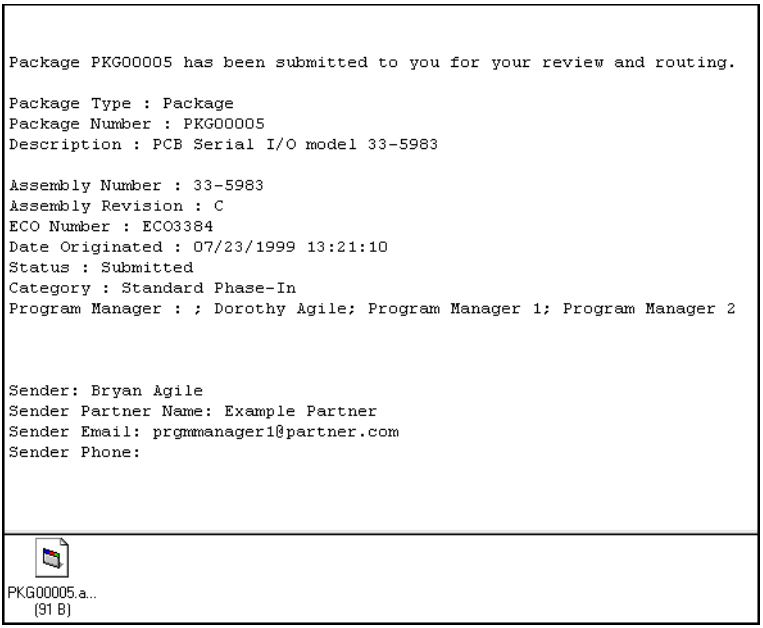
The Agile package appears with the **Cover Page** tab in front. For more information, see "Package Tabs" on page 11-4.

Submitting an Agile Package

Using Agile, you can submit an Agile package using the same buttons and procedure you use to submit a change, provided that your company is licensed to use packages, and you have the appropriate privileges. See "Switching Changes from One Status to Another Status" on page 6-33. The **Create Package** wizard also includes an option to submit the package in the final step.

No matter which Agile Software product was used to create the Agile package, when a partner submits an Agile package, the program manager is notified by email.

Figure 11-3: Example of Email Notifying Program Manager that an Agile Package Has Been Submitted



The program manager can also use defined searches in the Public Inbox to find recently submitted Agile packages. For details, see “Program Manager Searches in the Public Inbox” on page 15-11.

Using the same Agile buttons used to work with changes, the program manager can choose an action for the Agile package, including:

- Audit the Agile package.
  See “Auditing Changes” on page 6-29.
- Return the Agile package to the originator (partner) for more information.
  See “Returning a Change to the Originator” on page 6-47.
- Route the Agile package for review to a list of approvers and observers.
  See “Switching Changes from One Status to Another Status” on page 6-33.
- Accept the Agile package.
  See “Releasing Changes” on page 6-53.
- Cancel the Agile package.
  See “Canceling a Change” on page 6-48.

See Figure 11-2 on page 11-11 for a summary of the default package workflow.

Approving and Rejecting an Agile Package

Agile users on the approver and observer lists on the **Signoff** tab approve or reject an Agile package the same way they would approve or reject a change. See "Approving Changes" on page 6-42 and "Rejecting Changes" on page 6-43.

Approvers who do not respond to an Agile package within the reminder period receive a reminder email, telling them that they have not yet approved or rejected the Agile package. If the approvers do not respond within the review escalation period, then their appropriate designated escalation person receives an email, and can then accept or reject the Agile package in the place of the original approvers. The Agile packages appear in the designated escalation person's **All Changes Escalated to Me** Public Inbox search. See "Reminder Period and Review Escalation Period" on page 6-44 and "Designated Escalation Person" on page 6-44.

If you have the appropriate privileges, you can transfer your signoff authority to another user. Transferred Agile packages appear in the Transfer To User's **All Changes Transferred to Me** search in the **Public Inbox** folder. See "Transferring Signoff Authority" on page 6-45.

Searching for Agile Packages

If you have the appropriate privileges, you can search for Agile packages the same way you search for any object in the Agile database. For details, see Chapter 12, "Searching for Objects." If you have questions about your privileges, see your Agile administrator.

Figure 11-4: Program Manager System Searches



The Search folder in the left pane includes a Program Manager Searches folder, which contains program manager system searches. For details on the construction of these searches, see "Program Manager Searches" on page 15-9.

Final Status of Agile Packages

Once an Agile package has been reviewed and approved by the approvers and accepted by the program manager, the program manager can process the Agile package data using the internal procedures specific to your company. For example, the attachments on the Agile package **Attachments** tab may become attachments for Agile Items in your Agile database.

The procedures used to process package data are unique to each company. Ask your Agile administrator or your system administrator for information about how this task is performed at your company.

When you have completed processing the Agile package, the program manager can change its workflow status to the Closed type status by using either the **Next Status** button or **Signoff** tab.

Workflow Features and Licenses

Some features associated with Agile workflows are altered or not available depending on Server licenses at your site, and which licenses you have been granted. The following table provide details about which features may not be available to you.

Table 11-4: Package Server license restrictions

Agile Feature	Site does not have Product Record Management license but does have Package Server license	Site has Product Record Management license and Package Server license; User does not have Package license	Site has Product Record Management license and Package Server license; User has Package license, but unchecks Package box at login
Create and configure custom workflows in Agile Administrator	Agile administrator cannot create new workflows; can change only the Required Fields and Manual Valid Next Status in the default workflows.	Feature available in Agile Administrator and operative for users	Feature available in Agile Administrator and operative for users

Table 11-4: Package Server license restrictions (continued)

Agile Feature	Site does not have Product Record Management license but does have Package Server license	Site has Product Record Management license and Package Server license; User does not have Package license	Site has Product Record Management license and Package Server license; User has Package license, but unchecks Package box at login
Escalations (workflow status property)	Escalation period under workflows, and designated escalation person under **User** node properties not available in Agile Administrator	Feature available in Agile Administrator and operative for users	Feature available in Agile Administrator and operative for users
Reminders (workflow status property)	Reminder Period under workflows not available in Agile Administrator	Feature available in Agile Administrator and operative for users	Feature available in Agile Administrator and operative for users
Transfer Authority	No **Transfer Authority** menu item available in Agile	**Transfer Authority** menu item is available in Agile	**Transfer Authority** menu item is available in Agile
Autopromotion	AutoPromote property not available in Agile Administrator	Feature available in Agile Administrator and operative for users	Feature available in Agile Administrator and operative for users
Add default approvers/observers (workflow criteria-specific property)	Default approvers/ observers property not available in Agile Administrator	Feature available in Agile Administrator and operative for users	Feature available in Agile Administrator and operative for users
Add ad hoc approvers/observers (workflow status property)	Property available for packages only; for all changes, workflow property set to No in Agile Administrator; cannot be modified	Feature available in Agile Administrator and operative for users	Feature available in Agile Administrator and operative for users

Table 11-4: Package Server license restrictions (continued)

Agile Feature	Site does not have Product Record Management license but does have Package Server license	Site has Product Record Management license and Package Server license; User does not have Package license	Site has Product Record Management license and Package Server license; User has Package license, but unchecks Package box at login
If Rejected, Set Status To (workflow status property)	Property not available in Agile Administrator	Feature available in Agile Administrator and operative for users	Feature available in Agile Administrator and operative for users
If Autopromotion Fails, Notify (workflow status property)	Property not available in Agile Administrator	Feature available in Agile Administrator and operative for users	Feature available in Agile Administrator and operative for users
If Rejected, Notify (workflow status property)	Property not available in Agile Administrator	Feature available in Agile Administrator and operative for users	Feature available in Agile Administrator and operative for users
Notify Upon Entry (workflow criteria-specific property)	Property not available in Agile Administrator	Feature available in Agile Administrator and operative for users	Feature available in Agile Administrator and operative for users
Change Analyst searches	Provides Program Manager searches instead.	Available	Available
Public Inbox searches	This directory of searches is not visible or available.	Available	Available
Searches containing the Signoff and workflow attributes	Not available	Available	Available



CHAPTER 12
Searching for Objects

This chapter describes how to find specific objects in Agile using defined searches, quick searches, search by example, and advanced searches.

The chapter discusses these topics:

- *Overview of Searches*
- *Web Searches*
- *Predefined System Searches*
- *Using the Search Pane*
- *The Results Page*
- *Advanced Searches*
- *Where-Used Searches*
- *Searching for Changes with Workflow Attributes*
- *Editing Searches*
- *Managing Local Searches and Search Folders*
- *Performing Searches on Manufacturing Objects*
- *Full Text Search for Attachment File Contents*

Overview of Searches

This section contains the following topics:

- Types of Searches
- Defined Searches

When you want to find a particular object or objects, you perform a search. There are several types of search available in Agile.

The quickest search to define and use is the Web search, described in "Predefined System Searches" on page 12-5. When you perform a Web search, you enter text in the Agile **Search** field and look for an ID number or word that starts with that text.

For greater control, you can perform an advanced search. When you perform an advanced search, you instruct Agile to find all the objects with fields that match the conditions of the search. For example, you could search for parts where the **Description** field contains "Computer." For more information about advanced searches, see "Using the Search Pane" on page 12-8.

Agile can also perform where-used searches. This type of search finds the assemblies where the specified item is included on the BOM of the assembly. For more information, see "Where-Used Searches" on page 12-21.

You can also search the data fields for manufacturer parts and manufacturers.

Types of Searches

Agile provides three ways to search for objects: searches, searches by example and attachment content searches.

- **Searches** can look for more than one field at a time, and can be saved and revised. You can choose to find the object defined by the search conditions, or you can choose to find the assemblies where that object is used. Agile comes with several built-in, or *defined*, searches. If a suitable search already exists, this is the easiest way to find an object.
- **Attachment Content Searches** enable you to use a quick or advanced search to find specified content in attachment files. Refer to "Full Text Search for Attachment File Contents" on page 12-38.

For example, a search can locate all ECOs that were created after 1/1/04 ***and*** have a status of Released.

Searching on Rev-Specific Values

When performing object searches on criteria that include revision-specific values (for example, Rev, Lifecycle Phase, Rev. Release Date, Rev. Incorporate Date, and the **Manufacturers** tab fields), Agile reviews only the latest revision of each item object.

The latest revision is defined as one of the following:

- The latest released revision of the item

  The item has been released, it has a revision number, and there are no change orders or MCOs pending against the item.

- The latest pending revision of the item

  The item is on the **Affected Items** tab of one or more unreleased change orders or MCOs. If there is more than one pending revision, Agile returns only the latest pending revision.

- A preliminary item with no pending changes

  This preliminary item has no revision number or pending revision number. It has never been released and it is not on the **Affected Items** tab of a change order or an MCO.

Defined Searches

Defined searches are searches that have been saved. They might be built-in searches shipped with Agile, global searches created by your Agile administrator, or personal searches you created yourself.

Global searches are seen by all Agile users with appropriate Discovery and Read privileges. Personal searches are seen only by the user who created the search. Although personal searches are created on a local computer, they are stored on the server. This means that users can log in to any machine that runs Agile and see the personal searches they created, even if those searches were created on a different machine.

Web Searches

Web searches let you quickly locate objects in the Agile database that match the text you enter in the **Search** field at the top of Agile's left pane. The text must be the start of the ID number you are seeking or the beginning of a word within the object's description. Web searches are not case-sensitive. If you enter `card`, the Web search will find objects with this text in the description: Audio Card, card specifications, and CARD I/O.

Note If the **Search Attachment Content** checkbox is checked, then the Full Text Search (FTS) capability is enabled. Refer to "Full Text Search for Attachment File Contents" on page 12-38 for more details on the FTS capability.

To perform a quick Web search:

1. Enter the search characters in the field at the top of the left pane of the Web browser window.
2. Click the **Search** button.

Note The search returns all objects where the ID number or a word in the description contains the search characters.

Search Field

The **Search** field appears at the top of the left pane of Agile's Web client. It has a search string field for Web searches. You can enter the text you want to find and click **Search**. Or you can click **Advanced Search** to enter several search criteria. To view the results of the last search during your current session, click **Last Search Result**.

When you run a search, the results appear in the right pane of the Agile Web client.

Note The maximum number of search results that the Web client displays is 1000, even if the Max Query Result Displayed property in Administrator is set to greater than 1000.

When you search for items, the items displayed are the latest released revision or the most recent pending revision (which was created when the item was added to the **Affected Items** tab of an ECO or an MCO). See also "Searching on Rev-Specific Values" on page 12-2.

You can view an object in the results table by clicking its number.

Note If you do not have Discovery or Read privilege for an object (item, manufacturer, manufacturer part, change), it does not appear on the results table. You may see a message at the bottom of the table telling you how many objects are not displayed. For more information, see "Details About the Discovery and Read Privileges" on page 15-2. If you have questions about your Discovery or Read privileges, see your Agile administrator.

Saved Searches

Saved searches are advanced searches that have been saved for future use. They might be built-in searches shipped with Agile, global searches your Agile administrator created, or personal searches you created yourself.

Global searches are seen by all Agile users with appropriate Discovery and Read privileges. Personal searches are seen only by the user who created the search. Although personal searches are created on a local computer, they are stored on the server, which means you can log in to any computer that runs Agile and see the personal searches you've created, even if those searches were created on a different computer. Only you can see them, under your own login.

See "Using the Search Pane" on page 12-8 for information about defining your own searches.

Predefined System Searches

Agile comes with a set of predefined searches. You can use them as they are, or you can use them as a template to modify and save as your own custom searches.

If you have the Global Search privilege, you can edit or delete many of the predefined system searches. If you do not have the Global Search privilege, you can view the system searches.

It is highly recommended that you save a predefined system search with a new name before you modify it.

Which searches you see depends on your roles and privilege levels, licensed products, and user properties. If you have questions, see your Agile administrator.

Under the Global Searches folder, a folder named Workflow Search Samples contains additional predefined searches. If you have the Global Search privilege, you can modify the workflow sample searches.

Under My In-box, you see an additional search folder, called Public In-box. All users can run these predefined searches.

Users at sites with Manufacturer Management features may see an additional search folder called Component Engineer Searches. For more information, see "Component Engineer Searches" on page 12-36.

For instructions, see "Using Saved Searches" on page 2-8.

The Global Searches folder contains searches that all users may use; they are globally available. In addition, the Public Inbox folder (under My Inbox) also contains globally available searches. Depending on your assigned user licenses and user properties, the Change Analyst Searches folder and the Component Engineer Searches folder may also be available to you.

The following table describes the Global, Change Analyst, Public Inbox, and Personal searches.

Table 12-1: Predefined System Searches

Predefined Search	Edit/ View	Which Objects are Found
Global Searches Folder		
All Deviations About to Expire	No	All deviations that have an expiration date within one week of today
All Released Stop Ships	Yes	All stop ships with the status equal to Released
All Users	Yes	All Users with their corresponding data
All Contact Users	Yes	All Contact Users with their corresponding data
Change Analyst Searches Folder		
Unassigned Submitted Changes	Yes	All changes whose **Change Analyst** field is blank
Submitted More than 7 Days Ago	No	Changes submitted more than 7 days before today
Submitted More Than 14 Days Ago	No	Changes submitted more than 14 days before today
Submitted More Than 21 Days Ago	No	Changes submitted more than 21 days before today
Deleted Changes	No	All soft-deleted changes (see "Deleting Changes" on page 6-51)
Deleted Items	No	All soft-deleted items (see "Deleting Items" on page 3-19)
Items That Have Files Checked Out	Yes	All items that have files checked out on the **Attachments** tab
Released Items With Redlined Attachments	No	All items that have been released with redlined attachments on the item **Attachments** tab
Incorporated Items with Redlined Attachments	No	All items that have been incorporated with redlined attachments on the item **Attachments** tab
Sourcing Searches Folder		
All Suppliers	Yes	All **Suppliers** who provide **Manufacturer Parts** and with whom the buyer does business, as opposed to vendor, which is a generic term referring to all sellers in the marketplace
All Suspended Suppliers	Yes	All **Suppliers** who have been suspended because of some business or quality issue.

Predefined Search	Edit/ View	Which Objects are Found
All Approved Suppliers	Yes	All **Approved Suppliers** who provide **Manufacturer Parts**
All Certified Suppliers	Yes	All **Suppliers** who consistently meets predetermined quality, cost, delivery, financial, and count objectives. Incoming inspection may not be required.
All Preferred Suppliers	Yes	All **Suppliers** of choice.
All Alternate Suppliers	Yes	All **Suppliers** other than the Preferred one. The supplier alternate may or may not supply the items purchased, but is usually approved to supply those items.
Deleted Suppliers	Yes	All Suppliers who are deleted.
Deleted Users	Yes	All Users who are deleted.
Public Inbox Folder		
Changes Submitted to Me	Yes	Submitted changes (Submitted type status) for which I am the Analyst
Changes in Review for Which I Am The Analyst	Yes	Routed changes (Review type status) for which I am the Analyst
Rejected Changes For Which I Am The Analyst	No	Changes in Review type status with at least one rejection, for which I am the Analyst
Releasable Changes For Which I Am The Analyst	No	Changes in Review type status for which I am the Analyst and that have been approved, have no rejections, and are ready for release
Changes That Require My Approval	No	Unapproved changes where I am listed as an approver
Changes That I Am An Observer Of	No	Unapproved changes where I am listed as an observer
Changes That Were Returned To Me	No	Changes I submitted that were returned to originator (switched to Pending type status)
Pre-Upgrade Changes That Were Returned to Me (Optional search for upgrade systems only)	No	(This search appears only if your Agile system was upgraded from Agile Anywhere Release 6.x.) Changes I created before the upgrade that were returned to originator (switched to Pending type status). To find *all* changes Returned to Me, run this search and the changes That Were returned to Me search.

Predefined Search	Edit/ View	Which Objects are Found
Changes That Require My Action	No	Submitted changes for which I am the Analyst, changes in Review type status for which I am the Analyst and that have been approved and are ready for release, and unapproved changes where I am listed as an approver
All Changes Escalated to Me	No	Changes escalated to me; that is, changes where a user (for which I am the designated escalation person) has not signed off and the Escalation Period has elapsed
All Changes Transferred to Me	No	Changes where a user's signoff authority has been transferred to me for a specified period of time

Using the Search Pane

To quickly locate and open a particular object in Agile Advantage with a Web search:

1. Enter the first part of the object's ID number or a word in its description in the **Search** field at the top of the left pane. The search is not case-sensitive. You cannot use wildcards in this search.
2. Click the **Search** button.

To perform an advanced search using search criteria:

1. Click **Advanced Search** below the **Search** field.
2. Follow the instructions starting on page 12-14, "Creating an Advanced Search."

To view the results of the last search you performed:

Click **Last Search Result** below the **Search** field.

This runs the last search query. If the last search returned 0 results, the next-to-last search results appear.

Running a Saved Search

When you run a saved search, the found objects are listed in the right pane, below the name of the search.

To use searches shipped with Agile, created and saved by your Agile administrator, or saved by you:

1. Click **Searches** in the left pane of the Agile page to display folders of saved searches.
2. Click the name of the folder that you want to open.

3 Click the name of a search in that folder to run it.

Results appear in the right pane.

Viewing Search Results

When you run a search, the results appear on the Search Results page.

To open an object on the Search Results page:

Click its number.

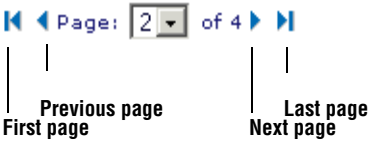
To print a list of objects found by the search:

Click the **Print** button on the Search Results page.

To scroll through multiple pages of search results:

Use the navigation buttons:

Figure 12-1: Navigation Buttons



Note The maximum number of search results that the Agile Web client displays is 1000, even if the Max Query Result Displayed property in Administrator is set to greater than 1000.

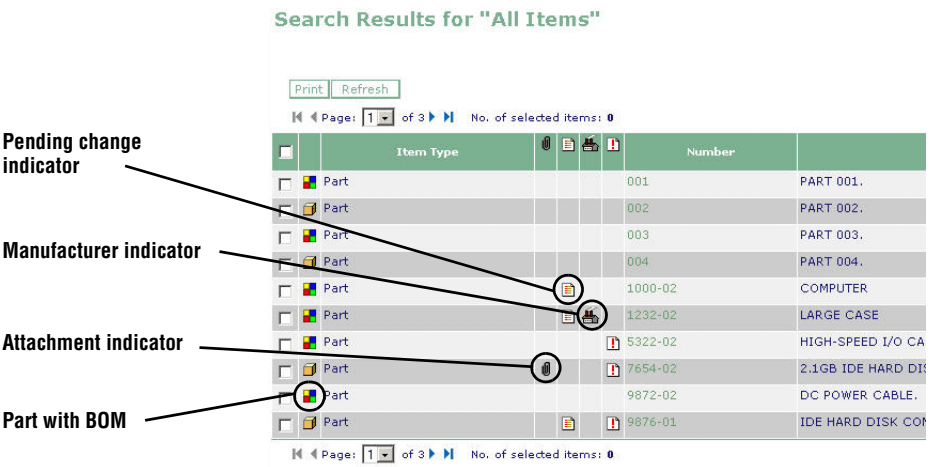
The Results Page

This section includes the following topics:

- Attachments Indicator
- Manufacturer Indicator
- Pending Change Indicator
- Affected Items Indicator
- BOM Indicator
- Opening Objects in the Results Page
- Refreshing the Results Page

The results page lists the objects Agile finds when it performs a search. A typical results page is shown below. The title bar of the results page contains the name of the search. For example, a search called All Items produced the results page shown below.

Figure 12-2: Results Window Showing the Indicator



Note If your company is licensed to use quality tracking features, a column in the search results table displays an icon for items referenced by open PSRs.

These buttons are available at the top of Agile search results page:

- The **Print** button prints the results page.
- Use the **Refresh** button to see an up-to-date results page.

With the results table active, you can:

- Copy all or part of the table and paste it into a word processor or spreadsheet file
- Print all or a selected portion of the results table

You can also do several things with the individual objects in the results table. You can:

- Open the object's tabbed window with the object's first tab on top: **Title Block** tab (for parts and documents), **Cover Page** tab (for changes), or **General Info** tab (for manufacturing objects)
- View an object's attached image (if there is one) without opening the object

Note If you do not have the Discovery privilege for an item, it does not appear on the results table. You may see a message at the bottom of the table telling you how many items are not displayed. If you have questions about your Discovery or Read privileges, see your Agile administrator.

Attachments Indicator

The attachments indicator indicates that the listed item has attachments. See the following figure for an illustration.

Note The results table displays the attachments indicator if the latest revision of the item has attachments. For the definition of the latest revision, see "Searching on Rev-Specific Values" page 12-1.

If previous released revisions have attachments, but the latest revision does not, the attachments indicator is not displayed. If the item is not released, the attachments indicator is displayed if the latest pending revision has attachments. If the latest change to the item is an MCO, the attachment indicator displays the attachments on the revision specified by the latest created ECO. If the item is preliminary, and has no pending changes, the attachment indicator is displayed.

Manufacturer Indicator

The manufacturer indicator indicates that the listed revision of the item has manufacturers on its **Manufacturers** tab.

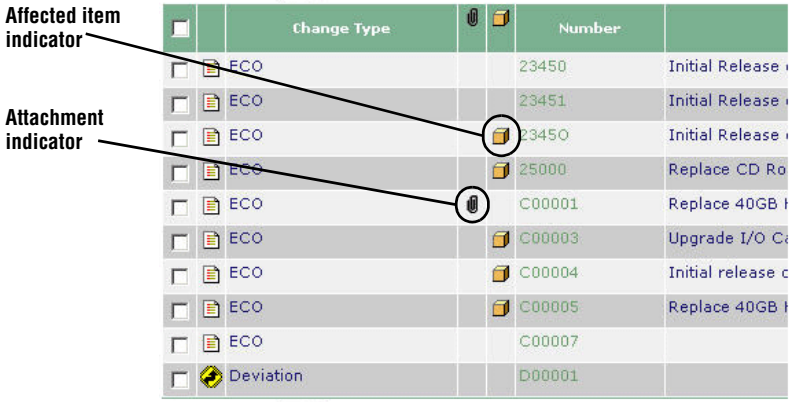
Pending Change Indicator

The pending change indicator indicates that the listed revision of the item has changes pending against it.

Affected Items Indicator

The affected items indicator indicates that the listed change has items on its affected items table. See the following figure for an illustration.

Figure 12-3: Results Window Showing Changes and Their Indicators



Open PSR Indicator

If your company is licensed to use quality tracking features, a column in the search results table displays an icon for items referenced by open PSRs. See Chapter 7, "Agile Quality Management."

BOM Indicator

In the Item Type column, one of the assembly icons is displayed instead of a part icon when the part has a BOM. Your Agile administrator chooses which one of these three available icons will be displayed to indicate an assembly.

Opening Objects in the Results Page

To open an object in the results page click on its number.

Refreshing the Results Window

When you add or delete objects from the database, an open results window does not automatically reflect those modifications. To see an up-to-date results window, click the **Refresh** button.

Advanced Searches

This section contains the following topics:

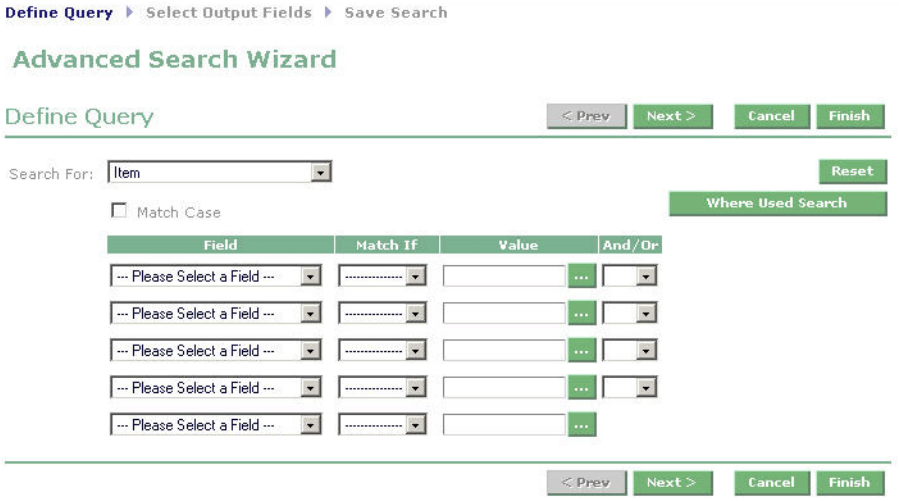
- Overview of Advanced Searches
- Creating an Advanced Search
- Saved Searches

Overview of Advanced Searches

Advanced searches look for all the objects with fields that match the conditions of the search. The object fields and attributes that Agile can use for advanced searches depend on whether you are searching for an object superclass, class, or subclass. See "Object Superclasses, Classes, and Subclasses" on page 1-7.

For example, Agile can search for the fields on the **Title Block** tab of items, the **Cover Page** tab of changes, and the **General Info** tab of manufacturing objects, as well as fields on the **Manufacturers** tab of items. If your company uses custom **Page Two** or **Page Three** fields (which appear on the **Title Block** or **Cover Page** tab in Agile), they may be referred to by a different name on your system. Agile can also search those fields. When searching for changes, Agile can search for workflow attributes and statuses on changes.

Figure 12-4: Advanced Search Wizard



Once you create and save a search, you can:

- Run it by clicking it in the left pane.
- Edit it as described in "Editing Searches" on page 12-31.

Creating an Advanced Search

This section contains the following topics:

- The Basic Process
- Selecting Search Operators
- Using Wildcard Characters in Searches
- Using And/Or Values

The Basic Process

Creating an advanced search is a three-step process, guided by the Advanced Search wizard. You create an Advanced Search by defining the query: the kind of object you want to search for and the search criteria (fields, conditions, values). Then you specify the output fields you want displayed in the search results.

The following sections describe these steps.

For information about how to perform a where-used search and locate assemblies where an item is used, see "Where-Used Searches" on page 12-21.

To create an advanced object search:

1. Click **Advanced Search** in the left pane near the top.
   The Define Query page appears.
2. In the **Search For** list, select the type of object to find.

   The object may be an item, a specific type of item (part or document), a change, a specific type of change (ECO, ECR, deviation, stop ship, or MCO), manufacturer, manufacturer part, or class or subclass of objects.

3 Check **Match Case** if you want to perform a case-sensitive search where text capitalization matters.
Checking the **Match Case** box can help your search run more quickly. If you enter text in the **Value** field, the search looks for text that is an exact match (uppercase and lowercase letters). If you selected a value from a list (such as for Product Line), checking the **Case Sensitive** box allows Agile to use internal database settings to find objects more quickly.

4 Define a set of search criteria, or conditions:

a Select a target field from the list. For example, Title Block.Number represents the **Number** field on the **Title Block** tab of a part or document.
The **Field** list varies depending on the object selected in the **Search For** field. For example, if you search for assembly drawings, the **Field** list includes Title Block.Size; if you search for ECOs, the **Field** list includes Cover Page.Status.

b Select a **Match If** search operator from the list. For more information, see "Selecting Search Operators" on page 12-17.

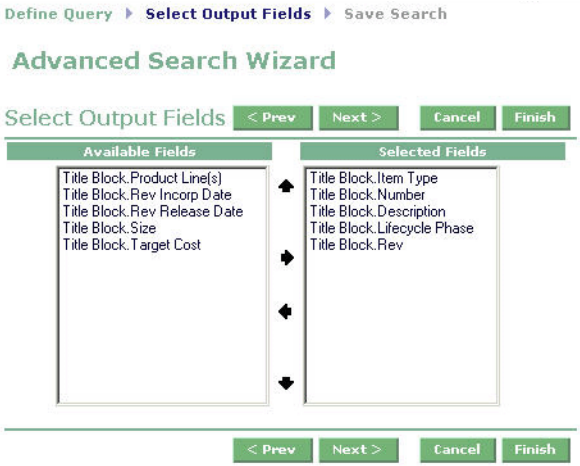
c Enter a value in the **Value** field.
Value specifies the content or setting of the field selected from the **Field** list. Depending on the selection in the **Field** list, the **Value** field may contain a list that is relevant to the selection, a calendar button, or a field where you can enter text or numbers. For example, if **Field** is set to Size, then **Value** lists different drawing sizes; if **Field** is set to Description, then you can type text or numbers in the **Value** field.
If you select Like as a Match If search operator, you can use wildcard characters when entering a value. For details, see "Using Wildcard Characters in Searches" on page 12-18.

d If you want to add another row of search conditions, set the **And/Or** field to And or Or. Use And if both conditions must be met. Use Or if either or both conditions can be met. For more information, see "Using And/Or Values" on page 12-18.
Multiple-row searches are processed row by row without prioritizing And/Or values. The first line is combined with the second based on the And/Or value listed for the first line. The result of that search is then processed with the third line using the second line's And/Or value, and so on.

5 When you have finished adding search conditions, click **Next** to specify which fields to include in the search results list and save the search, or click **Finish** to run the search without saving it.
If you click **Finish**, skip to step 10. If you click **Next**, the **Select Output Fields** page appears.

6 On the Select Output Fields page, use the right and left arrows to move fields to and from the **Available Fields** and **Selected Fields** lists. The **Selected Fields** list specifies the fields that appear in the search results list. Use the up and down arrows to change the order of fields in the list.

Figure 12-5: The Select Output Fields Page



Note The **Number** field is required by Agile. It cannot be removed from the list of fields selected for display.

7 When you have finished selecting output fields, click **Finish** to run the search, or click **Next** to save it.
If you click **Finish**, skip to step 10. If you click **Next**, the Save Search page appears.

8 Enter a name for the search. Then select a folder in which to store it. If you don't have sufficient privileges to save a search in the selected folder, you can select another. You can always save a search in the Personal Searches folder.

9 When you are ready to run the search, click **Finish**.

The **Search Results** page shows all the objects that match the search criteria. If there is more than one page, click the right arrow next to the page number to display the next page.

10 If you want to print the list of search results, click the **Print** button.

Selecting Search Operators

Search operators are specified in the **Match If** field. Available operators vary depending on the **Field** list selection. For example, if the **Field** setting is Title Block.Description, the **Match If** field includes the Contains operator along with several others; if the **Field** is set to Title Block.Size, the only operators are Equal To, Not Equal To, Is Null, and Is Not Null.

- The **Contains** operator finds any value that includes the contents of the **Value** field. For example, if you are searching for objects that contain the value "cap" in their description, the search would find objects described as capacitor, High Capacity Drive, CAP plug, and so on.
- The **Equal To** operator finds only an exact match with the contents of the **Value** field.
- The **Like** operator allows wildcard searches that match any single character. See "Using Wildcard Characters in Searches" on page 12-18.
- The **Starts With** operator finds values that begin with the characters in the **Value** field.
- The **Does Not Contain** operator finds any value that does not include the contents of the **Value** field.
- The **Not Equal To** operator finds any value other than an exact match with the contents of the **Value** field.
- The **Does Not Start With** operator finds values that do not begin with the characters in the **Value** field.
- The **Is Null** operator finds objects where the field selected from the **Field** list contains no value.
- The **Is Not Null** operator finds objects where the field selected from the **Field** list contains any value.
- The **Greater Than** operator finds dates later than, or duration (in hours) longer than, the date in the **Value** field.

- The **Greater Than Or Equal To** operator finds dates that match or are later than, or duration (in hours) that matches or is longer than, the date in the **Value** field.
- The **Less Than** operator finds dates earlier than, or duration (in hours) less than, the contents of the **Value** field.
- The **Less Than Or Equal To** operator finds dates that match or are earlier than, or duration (in hours) that matches or is less than, the contents of the **Value** field.

  Note The Less Than or Equal To operator checks the timestamp as well as the date. *If you specify only the date and don't include the time, Agile uses the default time of 00:00:00 (midnight); your search will not find objects timestamped later in that same day.* To ensure a complete range of correct matches, either enter a time along with the date, or enter the date of the following day without specifying the time. See "Modifying Date Fields" on page 2-11.

Using Wildcard Characters in Searches

The only search operator that allows wildcard characters is the Like operator. The Like operator is located in the **Match If** list.

Agile uses two wildcards: the percent sign (%) and the underscore (_). The underscore finds matches with any other single character. For example, `_at` finds hat, cat, and fat, but not splat. The percent sign finds matches with more than one character. For example, `%at` finds cat, splat, and big hat. The percent sign by itself finds matches with everything.

If you need to search for objects that contain %, type the backslash character (\) in front of the wildcard to indicate that you mean the % character, not the % wildcard. For example, to search for "10%" using the Like operator, type `10\%`.

If you need to match the backslash (\) character while using the Like operator, use two backslashes. For example, to search for "windows\system" using the Like operator, type `windows\\system`.

Using And/Or Values

When you have two or more conditions defined in a search, the relationship between them is defined as either *And* or *Or*.

And narrows the search by requiring that both conditions are met. Each item in the results must match both conditions.

Or broadens the search by including any object that meets either condition. Each item in the results table needs to match only one of the conditions, but may match both.

When you define a search with Equal to and And, both sides of the definition must be true. For example, the following search

	Title Block.Product Line(s) Equal to Taurus		And	
	Title Block.Product Line(s) Equal to Scorpio			

results in zero objects found. This is because if the first part of the definition is true (that is, the object belongs only to the product line Taurus), then the second part of the definition cannot also be true (that is, the object cannot belong only to the product line Scorpio).

In the example above, if you wanted to search for objects that belong to more than one product line, you could use Contains with And. The following search would find all the objects that belong to both the Taurus *and* Scorpio product lines because both sides of the definition could be true:

	Title Block.Product Line(s) Contains Taurus		And	
	Title Block.Product Line(s) Contains Scorpio			

Searches using Attachment Attributes and the And/Or Value

When using **Attachments** tab attributes to search for objects, you cannot use Or to combine an attachment attribute (Attachments.Checkout User, Attachments.File Name, or Attachments.File Type) with a non-attachment attribute. For example, you cannot save the following search: Attachments.File Type Equals PDF Or Cover Page.Product Line(s) Contains Taurus. However, you can save and run this search if you change the logical operator to And.

	Attachments.File Type Equals PDF		And	
	Title Block.Product Line(s) Contains Taurus			

Searches that combine attachment attributes with other attachment attributes can use either And or Or as the logical operator. Both of the following searches are examples of valid attachment attribute searches:

	Attachments.File Type Equals PDF		And	
	Attachments.Checkout User Equals Mary Jones			

	Attachments.File Type Equals GIF		Or	
	Attachments.File Name Contains test			

Using And/Or — An Example

Knowing when you want to use And versus Or in constructing your search criteria can help you get the most accurate results from your search and save you valuable time. For example, the following figure shows a search that looks for parts that have *both* a part category equal to Electrical *and* a lifecycle phase equal to Inactive.

	Title Block.Part Category Equal To Electrical		And	
	Title Block.Lifecycle Phase Equal To Inactive			

If you replace And with Or, the search locates all parts with *either* a part category of Electrical *or* a lifecycle phase of Inactive. Depending on your database, this latter search might locate a very large number of parts.

Changing the And/Or Value

When Agile adds a condition to the search condition table, it automatically adds And to the previous condition.

To select an And/Or value:

1. Select the appropriate search condition.
2. Click the **And>>** button.
3. Select And, Or, or None from the displayed list.

   Note Select None to erase the And/Or value. You need to select None if you have a set operator in the same row. Except for the last row, each row in the search conditions table must have one and only one operator: either a logical operator (And/Or) or a set operator (Union/Intersection/Minus).

Running a Saved Search

When you run a saved search, the found objects are listed in the right pane, below the name of the search.

To use searches shipped with Agile, created by your Agile administrator, or saved by you:

1. Click **Searches** in the left pane of the Agile page to display folders of saved searches.
2. Click the name of the folder that you want to open.
3. Click the name of a search in that folder to run it.

   Results appear in the right pane.

Where-Used Searches

This section contains the following topics:

- Definition of a Where-Used Search
- Creating a Where-Used Search
- Where-Used Search Types
- Where-Used Set Operators

Definition of a Where-Used Search

Where-used searches are specialized searches that find assemblies that meet the search criteria.

In an object search, the search conditions define the objects you want to find, and the objects that meet those search conditions appear in the search results table.

In contrast, in a where-used search, the search conditions define the items that appear on the BOMs of the objects that you want to find. A where-used search finds the assemblies that use the defined items. The assemblies in which the defined items are used appear in the search results table.

For example, the intent of an object search is:

Create a list of items whose **Description** field contains Computer.

The intent of a where-used search with the same search condition is

Create a list of assemblies where the BOM contains items whose **Description** field contains Computer.

In a where-used search, the search conditions are used to define only the types of objects that might appear on the BOM of an assembly:

- Objects in the items superclass
- Objects in the Parts class
- Objects in user-defined Parts subclasses
- Objects in the Documents class
- Object in user-defined Document subclasses

Other object types (changes, manufacturers, manufacturer parts) cannot be included on a BOM, and therefore, you cannot select these object types when defining a where-used search condition.

Creating a Where-Used Search

The process for creating a where-used search is similar to the process for creating an object search.

To create a where-used search:

1. Click **Advanced Search** in the left pane near the top.

   The Define Query page appears.

2. Click the **Where Used Search** button.

   The Define Query page of the Advanced Search Where Used wizard appears.

3. In the **Search Type** list, select the type of where-used search to perform.

4. In the **Search For** list, select the type of object to find.

   The object must be an item or a part or document class or subclass.

5. Check **Match Case** if you want to perform a case-sensitive search where capitalization matters.

   Checking the **Match Case** box can help your search run more quickly. If you enter text in the **Value** field, the search looks for text that is an exact match (uppercase and lowercase letters). If you selected a value from a list (such as for Product Line), checking the **Case Sensitive** box allows Agile to use internal database settings to find objects more quickly.

6 Define a set of search criteria, or conditions:

a Select a target field from the list. For example, Title Block.Number represents the **Number** field on the **Title Block** tab of a part or document.

The **Field** list varies depending on the object selected in the **Search For** field. For example, if you search for assembly drawings, the **Field** list includes Title Block.Size; if you search for ECOs, the **Field** list includes Cover Page.Status.

b Select a **Match If** search operator from the list. For more information, see "Selecting Search Operators" on page 12-17.

c Enter a value in the **Value** field.

Value specifies the content or setting of the field selected from the **Field** list. Depending on the selection in the **Field** list, the **Value** field may contain a list that is relevant to the selection, a calendar button, or a field where you can enter text or numbers. For example, if **Field** is set to Size, then **Value** lists different drawing sizes; if **Field** is set to Description, then you can type text or numbers in the **Value** field.

If you select Like as a Match If search operator, you can use wildcard characters when entering a value. For details, see "Using Wildcard Characters in Searches" on page 12-18.

d If you want to add another row of search conditions, use the **And/Or** field or **Union/Intersection** field:

- Set the **And/Or** field to And, Or, or none to show whether the search conditions for either or both rows must be met. Use And if both conditions must be met. Use Or if either or both conditions can be met. Leave the field blank to use the **Union/Intersection** field. For more information, see "Using And/Or Values" on page 12-18.
- Set the **Union/Intersection** field to Union, Intersection, Minus, or none to specify how to combine or limit the sets of items that are included on the BOMs of the assemblies in the search results table. For details, see "Where-Used Set Operators" on page 12-27.

Multiple-row searches are processed row by row without prioritizing And/Or values. The first line is combined with the second based on the And/Or value listed for the first line. The result of that search is then processed with the third line using the second line's And/Or value, and so on.

7 When you have finished adding search conditions, click **Next** to specify which fields to include in the search results list and save the search, or click **Finish** to run the search without saving it.

If you click **Finish**, skip to step 11. If you click **Next**, the Select Output Fields page appears.

8 On the Select Output Fields page, use the right and left arrows to move fields to and from the **Available Fields** and **Selected Fields** lists. The **Selected Fields** list specifies the fields that appear in the search results list. Use the up and down arrows to change the order of fields in the list.

Note The **Number** field is required by Agile. It cannot be removed from the list of fields selected for display.

9 When you have finished selecting output fields, click **Finish** to run the search, or click **Next** to save it.

If you click **Finish**, skip to step 11. If you click **Next**, the Save Search page appears.

10 Enter a name for the search. Then select a folder in which to store it. If you don't have sufficient privileges to save a search in the selected folder, you can select another. You can always save a search in the Personal Searches folder.

11 When you are ready to run the search, click **Finish**.

The Search Results page shows all the objects that match the search criteria. If there is more than one page, click the right arrow next to the page number to display the next page.

12 If you want to print the list of search results, click the **Print** button.

Where-Used Search Types

The following sections describe the five types of where-used searches:

- Where-Used All Levels Latest Released Revision Only
- Where-Used Top Level Latest Released Revision Only
- Where-Used One Level All Released Revisions
- Where-Used One Level Latest Released Revision Only
- Where-Used One Level Latest Revision, Released or Pending

Where-Used All Levels Latest Released Revision Only

This where-used search type returns a list of the latest-released revision of assemblies. Note that:

- Pending revisions are *not* included.

- Preliminary assemblies with no pending change orders or MCOs are included.

The object described by the search conditions is contained, directly or indirectly, on the BOMs of the returned assemblies. This search returns assemblies that contain the described object at any BOM level.

For example, in Figure 12-6, part 222 appears on the BOM of assembly number 999. Part 222 is contained *directly* on the BOM of assembly 999. Assembly 999 includes several subassemblies. Part 333 appears on the subassembly 777. Therefore, part 333 is *indirectly* contained on the BOM of assembly 999. A Where-used All Levels Latest Released Revision Only search for part 333 returns both assembly 999 (indirectly contained) and subassembly 777 (directly contained).

Where-Used Top Level Latest Released Revision Only

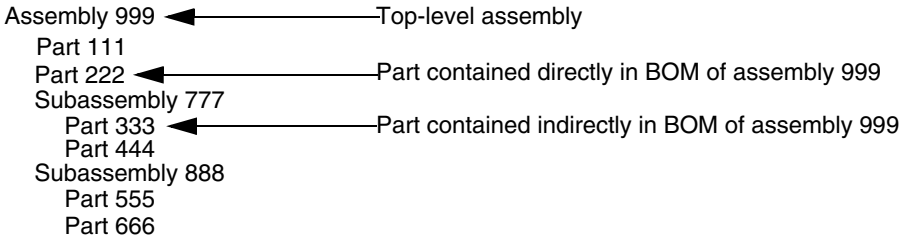
This where-used search type returns a list of top-level assemblies, latest released revision only. Note that:

- Pending revisions are *not* included.
- Preliminary assemblies with no pending change orders or MCOs are included.

The object described by the search conditions is contained, directly or indirectly, on the BOMs of the returned assemblies.

For example, in the following figure, a Where-used Top Level Latest Released Revision Only search for part 333 returns only assembly 999, the top-level assembly.

Figure 12-6: Parts and Subassemblies of Assembly 999



Where-Used One Level All Released Revisions

This where-used search type returns a list of all the released revision assemblies. Note that:

- Pending revisions are *not* included.

- Preliminary assemblies with no pending change orders or MCOs are included.

For more information about item revisions and search results, see "Searching on Rev-Specific Values" on page 12-2.

The object described in the search conditions is contained directly on the BOM of the released revision of the assembly, even if it is not the latest released revision.

For example, in Figure 12-7, a Where-used One Level All Released Revisions search for part 222 returns assembly 999 Rev A and assembly 999 Rev C. Revisions B, D, and F are released revisions, but do not directly contain part 222. Revision (F) does directly contain part 222, but because Rev (F) is a pending revision, it is not included in the search results.

Where-Used One Level Latest Released Revision Only

This where-used search type returns a list of latest released revision assemblies. Note that:

- Pending revisions are *not* included.
- Preliminary assemblies with no pending change orders or MCOs are included.

For more information about item revisions and search results, see "Searching on Rev-Specific Values" on page 12-2.

The object described by the search conditions is contained directly on the BOMs of the returned assemblies.

For example, in Figure 12-7 below, a Where-used One Level Latest Released Revision Only search for part 111 returns assembly 999 Rev E only. Part 111 is directly contained on the BOM of the latest released revision of assembly 999. Previous released revisions of assembly 999 also contain part 111, but because they are not the latest released revision, they are not included in the search results. Rev (F) also contains part 111, but because it is a pending revision, it is not included in the search results.

Where-Used One Level Latest Revision, Released or Pending

This where-used search type returns a list of the latest revision assemblies. Note that:

- Pending revisions are included.
- Preliminary assemblies with no pending change orders or MCOs are included.

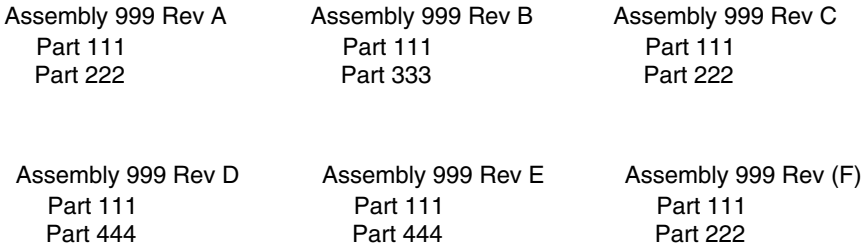
For more information about item revisions and search results, see "Searching on Rev-Specific Values" on page 12-2.

Pending *and* released revisions are included in the search results. Only one revision (released, pending, or preliminary) of the assembly is returned. The object described by the search conditions is contained directly on the BOMs of the returned assemblies.

For example, in the following figure, a Where-used One Level Latest Revision, Released or Pending search for part 111 returns assembly 999 Rev (F) only. Part 111 is directly contained on the BOM of the pending revision of assembly 999.

A preliminary revision of an assembly can also be the latest revision. As long as the preliminary assembly does not have any changes pending against it, it is the latest revision. When a preliminary assembly is added to the **Affected Items** tab of a change order, the pending revision created by the change order then becomes the latest revision.

Figure 12-7: Revisions of Assembly 999



Where-Used Set Operators

Where-used set operators allow you to further define relationships between grouped search conditions.

The where-used search set operators are:

- Union
- Intersection
- Minus

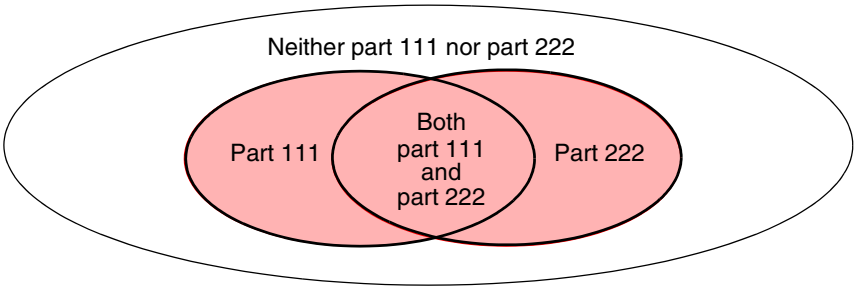
Note You cannot use the And/Or logical operator in the same search condition row as a set operator. Except for the last row, each row in the search conditions table must have one and only one operator: either a logical operator (And/Or) or a set operator (Union/Intersection/Minus).

To erase the logical operator, click the **And/Or** button to cycle through the available choices until the value is none (a blank). See "Using And/Or Values" on page 12-18.

Union

This operator is the equivalent of Or. For example, this allows you to find assemblies that contain part 111 or assemblies that contain part 222. The search results are the union of these two sets of assemblies.

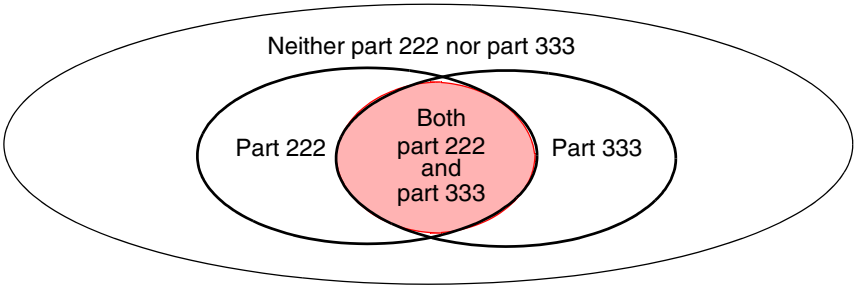
Figure 12-8: Where-Used Union Set Operator; Shaded Area Indicates Assemblies Found



Intersection

This operator is the equivalent of And. For example, this allows you to find assemblies that contain part 222 and part 333. The search results are the intersection of these two sets of assemblies.

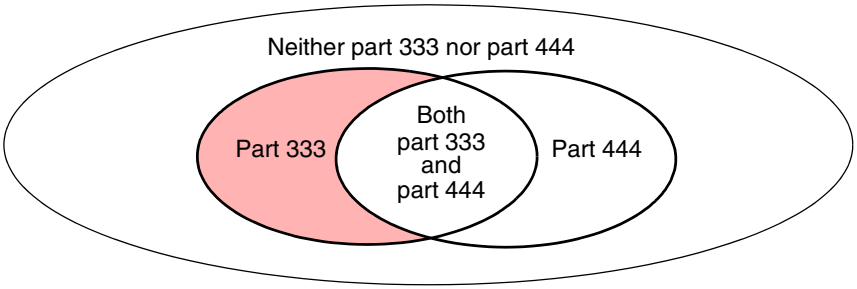
Figure 12-9: Where-Used Intersection Set Operator; Shaded Area Indicates Assemblies Found



Minus

This operator is the equivalent of Not. For example, this operator allows you to find assemblies that contain part 333, but not part 444. The search results are the difference between the part 333 assemblies that contain part 444 and the part 333 assemblies that do not contain part 444.

Figure 12-10: Where-Used Minus Set Operator; Shaded Area Indicates Assemblies Found



The following table illustrates how the set operators can be used. This search locates all assemblies that contain (part 111 or part 222) and part 333, but not part 444.

	Title Block.Number Equal To 111			Union
	Title Block.Number Equal To 222			Intersection
	Title Block.Number Equal To 333			Minus
	Title Block.Number Equal To 444			

This where-used search first finds assemblies that contain either part 111 or part 222. Next, in the resulting list of assemblies, the search then finds assemblies that also contain part 333. In that resulting list of assemblies, the search now subtracts any assemblies that contain part 444.

Searching for Changes with Workflow Attributes

Agile comes with a large array of predefined search samples based on workflow attributes. These are designed to complete the majority of tasks for change analysts, observers, and approvers, but they can be used by any users if they are assigned the appropriate privileges.

Note Your ability to use workflow attributes to create searches may be limited depending on the Agile licenses at your site, and which licenses you have been granted.

These predefined workflow searches are also modifiable for use as templates. Building a search with workflow attributes is the same as building standard searches. However, you need to follow some special rules in order to build a successful search. For more information about building a search, begin with "Creating an Advanced Search" on page 12-14.

It is highly recommended that you save the predefined searches with a new name before they are modified. This way you will always have a template to work from if you need to start over.

Table 12-2: Predefined sample workflow searches

Workflow Sample Search	Edit/ View	Which changes are found
Releasable Changes that have been approved	Yes	Changes that have been approved by all the approvers and that are ready to be switched to a Released type status
Changes that have been approved by all Approvers	Yes	Changes that have been approved by all the approvers at the current status. All the approvers have signed off, and no approver rejected the change.
Changes that have not been approved by all Approvers	Yes	Changes that haven't been approved by all the approvers. One or more approvers may have rejected the change.
Changes that have not been approved by all Observers	Yes	Find changes that have not been approved by all observers.
Changes that have not been signed off by either Approvers or Observers	Yes	Changes where one or more approvers or observers have not signed off.
Changes that not all Approvers have acted on	Yes	Changes where one or more approvers have signed off at the current status. The current status may be a Review type status or a Released type status.
Changes that no Approver has signed off	Yes	Changes that no approvers have signed off. The change has not been rejected nor has it been approved by any approver.
Changes that one or more Approver has signed off	Yes	Changes that one or more approvers have signed off.
Changes that have been released since <date> and that I approved	Yes	Changes that have been released since *specified date* and that the current user (me) has approved.

Table 12-2: Predefined sample workflow searches (continued)

Workflow Sample Search	Edit/ View	Which changes are found
Changes that I am an Approver of	Yes	Changes that have the current user (me) as an approver.
Changes that I have signed off as an Approver	Yes	Changes that have the current user (me) as an approver and I have signed off as an approver.
Changes that I am an Approver of and all Approvers have approved	Yes	Changes that have the current user (me) as an approver and that all approvers have approved.
Changes that I have been notified of	Yes	Changes that have the current user (me) on the list of users to notify.
Changes that I am not an Observer of	Yes	Changes that do not have the current user (me) as an observer.
Changes that have one or more Approvers	Yes	Changes that have one or more approvers.
Changes that have no Approver	Yes	Changes that have no approvers.
Unreleased Changes that all Approvers have approved	Yes	Change that all approvers have approved that have not yet moved into the first Released type status in the workflow.
Changes that no Approver has rejected	Yes	Changes that no approver has rejected.
Changes that some Observers have not signed off	Yes	Changes that some observers have not signed off.
Changes that have not been signed off for more than 14 days	Yes	Changes that some approvers have not signed off and that have been in the Review type status for more than 14 days (336 hours).

Editing Searches

When you edit a search, you are changing the combination of conditions Agile looks for. You might want to edit a search to either broaden or narrow the scope of the search or change the output fields.

Note Whether a search is editable depends on your privileges.

When editing a search you can:

- Alter the values of search criteria

- Add conditions to the search condition table
- Insert conditions into the interior of the search condition table
- Delete conditions from the search conditions table
- Substitute an And for an Or and vice versa

To edit a search:

1. Choose **Settings** in the menu bar.
2. Click **Organize Saved Searches** in the User Settings list.
3. Click the folder names in the right pane to open them until you find the search you want to edit.
4. Click the radio button in front of the search to select it.
5. Click the **Edit** button.
   The **Advanced Search Wizard** opens.
6. Follow the steps in "Using the Search Pane" on page 12-8 or "Where-Used Searches" on page 12-21 to edit the search and save your changes.

Deleting a Search Condition

Setting the **Field** contents to the default deletes a condition line from the search conditions table.

To delete a search condition:

1. In the Advanced Search wizard (as described in the previous section, "Editing Searches"), select the condition you want to delete.
2. Change its **Field** value to ---Please Select a Field---.
3. Be sure the And and Or settings are correct.
4. Continue editing the search.

Managing Local Searches and Search Folders

If you have sufficient privileges, you can rename, delete, and rearrange both searches and the folders, even some of the default system searches.

This section contains the following topics:

- Search Folder Privileges

- Renaming a Search
- Deleting a Search
- Using Folders to Organize Searches

Search Folder Privileges

If you have the Global Search privilege, you can delete any viewable predefined system search or folder. Your assigned privileges determine your ability to edit specific searches and folders. Depending on your privileges, you may not be able to perform all the following operations on all searches or search folders. If you have questions about your privileges, see your Agile administrator.

Table 12-3: Global Search privilege: which folders and searches can be deleted

With or without Global Search privilege	With Global Search privilege	No Global Search privilege
Cannot delete these folders	**Can delete folders or searches created in these folders**	**User who created folders and searches in these folders can delete those folders and searches**
Searches		
Global Searches	Global Searches	
Change Analyst Searches	Change Analyst Searches	
Component Engineer Searches	Component Engineer Searches	
My Inbox		My Inbox
Personal Searches		Personal Searches
Public Inbox	Public Inbox	
	Workflow Search Samples	

Renaming a Search

You can rename a saved search to better indicate the type of objects the search is designed to locate.

To rename a search:

1. Choose **Settings** in the menu bar.
2. Click **Organize Saved Searches** in the User Settings list.

3. Click the folder names in the right pane to open them until you find the search you want to rename.
4. Click in front of the search to select it.
5. Click the **Edit** button.

   The Advanced Search wizard opens.
6. Follow the steps in "Using the Search Pane" or "Where-Used Searches" to edit the search and save your changes.

Deleting a Search

You delete a search from the Organized Saved Searches page.

To delete a search:

1. Choose **Settings** in the menu bar.
2. Click **Organize Saved Searches** in the User Settings list.
3. Click the folder names in the right pane to open them until you find the search you want to delete.
4. Click the radio button in front of the search to select it.
5. Click the **Delete** button.
6. When the confirmation prompt appears, click **OK**.

Using Folders to Organize Searches

You can organize your searches in folders to make them easier to locate and manage. You can use the existing folders or create new ones.

Creating a Folder

To create a folder:

1. Choose **Settings** in the menu bar.
2. Click **Organize Saved Searches** in the User Settings list.
3. Click the **New Folder** button.
4. On the **Create New Folder** page, enter a name for the new folder.

5 Click existing folder names until you find the folder that will hold the new folder. For example, you can usually add a folder to Personal Searches.

6 Click the radio button in front of the folder to select it.

7 Click **Save**.

Deleting a Folder

You can delete a folder, even if it is not empty.

To delete a folder:

1 Choose **Settings** in the menu bar.

2 Click **Organize Saved Searches** in the User Settings list.

3 Click the folder names in the right pane to open them until you find the folder you want to delete.

4 Click the radio button in front of the folder to select it.

5 Click the **Delete** button.

6 When the confirmation prompt appears, click **OK**.

Performing Searches on Manufacturing Objects

Users who have the necessary privileges can perform the processes described in this section. This section contains the following topics:

- Searching for Manufacturing Objects
- Component Engineer Searches
- Using Search Criteria from the Manufacturers Tab
- An Example of a Search

Searching for Manufacturing Objects

You can search fields on the manufacturer and manufacturers parts objects by subclass. For example, if your Agile administrator has defined additional manufacturer types (subclasses) under the Manufacturers class, you can search for all the subclasses by searching the Manufacturers class or search specifically for a particular type of manufacturer (subclass).

You can also use Web searches to search for specific ID prefixes (for example, M or MP, if you use those) or terms in descriptions.

To perform an Advanced Search for manufacturing objects:

1. Click **Advanced Search** in the left pane.
2. Construct your search, selecting the fields and conditions for which you want to search the database. The manufacturing object fields and their associated values are available on the drop-down lists, along with the other searchable Agile data fields. Select the appropriate fields to build your search query.
3. Follow the onscreen wizard steps, clicking **Next** as each step is completed. Then click **Finish**.

   Note Page Three data is searched by subclass. It is searchable only if the **Page Three** section is being used in your system. If you have questions, ask your Agile administrator.

Component Engineer Searches

You may see a search folder called Component Engineer Searches.

Component Engineer Searches enable you to search for unused or deleted manufacturers or manufacturer parts credited to multiple parents.

The following table describes the component engineer searches.

Table 12-4: Predefined Component Engineer Searches

Predefined Search	Which Objects are found
Manufacturer Parts Not Used for a Latest Released Part	Manufacturer parts that are not being used in the latest revision of any currently released part (although they might be used in a Preliminary part)
Manufacturers Not Used for a Latest Released Part	Manufacturers that are not being used in the latest revision of any currently released part (although they might be used in a Preliminary part)
Manufacturer Parts with Multiple Parents	Manufacturer parts that are used on more than one item's **Manufacturers** tab
Deleted Manufacturer Parts	Soft-deleted manufacturers parts (For more information about soft-deleted manufacturer parts, see "Deleting Manufacturing Objects" on page 4-12.)

Table 12-4: Predefined Component Engineer Searches

Predefined Search	Which Objects are found
Deleted Manufacturers	Soft-deleted manufacturers (For more information about soft-deleted manufacturers, see "Deleting Manufacturing Objects" on page 4-12.)

Using Search Criteria from the Manufacturers Tab

Due to the many-to-one relationships between manufacturers, manufacturer parts, and items, you may want to refine how the search results are displayed without further restricting your search.

Some many-to-one relationships are:

- One manufacturer can have many manufacturers parts associated with it.
- One item can have more than one approved manufacturer part.
- One item may have more than one approved manufacturer part from the same manufacturer.
- One manufacturer part number may be used by more than one manufacturer; for example both Acme Widgets and August Industries may provide a part numbered 234.
- One manufacturer part may be an approved part for more than one item.

Select output fields in the search wizard to add columns of information to the results table that reveal the many-to-one relationships of your search results.

An Example of a Search

Suppose your company has approved 10 different parts from Acme Widgets. Eight of those manufacturer parts are specified as an approved manufacturer part for eight different items. Two of those manufacturer parts (Acme Widgets part number 234 and Acme Widgets part number 567) are specified as the preferred and alternate parts, respectively, for item 333.

To find all the items that have Acme Widgets as an approved manufacturer:

1. Build a search with this search condition:
   Search For = Part
   Field = Manufacturer.Mfr Name
   Match if = Equal To
   Value field = Acme Widgets
2. Click **Next**.
3. Add **Manufacturer.Mfr Name** as an output field for the results table.
4. Click **Finish** to run the search.

You will notice the following about the results table:

- There is a column displaying the manufacturer name. In this case, each cell in the column displays Acme Widgets.
- The results table displays nine items. Therefore, there are nine items that have Acme Widgets as an approved vendor.
- Item 333 appears once in the results table.

Full Text Search for Attachment File Contents

The Full Text Search (FTS) capability enables you to find specific information stored in files in the Agile Advantage secure vault. Through the Quick Web Search or the Advanced Search, you can search for attachment files in order to find a particular word or phrase.

When you search for an attachment file content, the search results list each object containing the attachment files that match the search criteria. Only the latest versions of attachments are listed.

The results of your searches are sorted by relevance. Relevance ranking corresponds to the total number of word or phrase hits.

If an object contains multiple attachment files and only one of these files contains the search text, the entire object is returned. The file containing the text is not indicated, and you may need to look through all the attachment files to find the appropriate one.

Note The FTS capability does *not* support synonyms, since this feature requires the creation of a thesaurus.

Important Attachment files need to be indexed in order to use the FTS capability. Files are indexed based on a schedule configured in Agile Administrator. FTS also supports Agile's distributed iFS capability. Files that exist on different iFS locations are indexed by the system. For more information on indexing, refer to the *Agile Administrator 2006 User Guide*.

Using Quick Web Search to Find Attachment File Content

To search for an attachment file content by performing a Quick Web Search, check the **Search Attachment Content** checkbox and enter the text in the **Search** field at the top of Agile's left pane.

Using Advanced Search to Find Attachment File Content

When using Advanced Search to find an attachment file content, select **Attachments.File Content** from the **Field** drop down menu.

Table 12-5 lists the available **Match If** operators for **Attachments.File Content** searches.

Table 12-5: Match If Operators

Settings	Finds	Examples
Contains All	Attachment files that contain all the words that you specify (in any order).	Search text: "PCB layout" Search results may include: • "PCB layout" • "PCB design layout" • "Layout of PCB"
About (refer to Concept Searching section below)	-	-
Advanced Contains (refer to the Boolean Logic section below)	-	-

Settings	Finds	Examples
Contains Any	Attachment files that contain at least one of the words specified by the user.	Search text: "PCB layout" Search results may include: • "PCB layout" • "PCB design layout" • "Layout of PCB" • "PCB design" • "Circuit board layout"
Contains None Of	Attachments that do not contain the words specified by the user.	Search text: "PCB layout" Search results never include: • "PCB" • "layout"
Contains Phrase	Attachment files that contain all the words specified by the user.	Search text: "PCB layout" Search results include only "PCB layout"

Note When using Advanced Search to find an attachment file content, you cannot add more than one **Attachments.File Content** Search Condition.

Supported Search Types

Agile Advantage 2006 FTS supports the following search types:

- ❑ Stop Words
- ❑ Wildcards
- ❑ Boolean Logic

Stop Words

Stop words are ignored by the system in searching against attachment files. For example, "the" is considered a stop word, therefore searching for "the mouse" will return all matches for "mouse" (which include attachment contents with the string "the mouse" because the stop word "the" is ignored).

The list below shows the Agile Advantage default stop words:

- a, all, almost, also, although, an, and, any, are, as, at
- be, because, been, both, but, by

- can, could
- d, did, do, does
- either
- for, from
- had, has, have, having, he, her, here, hers, him, his, how, however
- i, if, in, into, is, it, its
- just
- ll
- me, might, Mr, Mrs, Ms, my
- no, non, nor, not
- of, on, one, only, onto, or, our, ours
- s, shall, she, should, since, so, some, still, such
- t, than, that, the, their, them, then, there, therefore, these, they, this, those, though, through, thus, to, too
- until
- ve, very
- was, we, were, what, when, where, whether, which, while, who, whose, why, will, with, would
- yet, you, your, yours

Note The preceding default list of stop words can be modified in the Agile Administrator. For more details, see "Setting Full Text Search Preferences" on page 11-10 in the *Agile Administrator 2006 for Agile Advantage User Guide*.

Wildcards

Agile supports two wildcards:

- The percent sign (%): finds matches with more than one character.
- The underscore (_): finds matches with any other single character.

Table 12-6 shows examples of searches performed using wildcards and their corresponding attachment content matches.

Table 12-6: Examples of Searches Performed With Wildcards

Search Criteria	Matched Attachment Content
_at	bat, cat
%at	bat, cat, splat, big hat
1001-0_2	1001-002, 1001-012, 1001-0A2
1001-0%2	1001-012, 1001-0A2, 1001-0A12, 1001-03742
Semi%	ABC Semi Haulers, ABC Semiconductor

Note Wildcards ***cannot*** be used with the **Match If** operator set to **About** or **Advanced Contains.**

For further information about wildcards, refer to "Using Wildcard Characters in Searches", on page 12-18.

Boolean Logic

The Agile Advantage 2006 FTS supports two specialized search settings:

- ❑ Concept Searching
- ❑ Stem Searching

Concept Searching

Concept searching searches for words that are about the same concept as the word specified by the user.

For example:

- If the search text is "sports", search results may include "basketball" or "baseball".

Stem Searching

Stem searching searches for the root of the specified word and finds all the attachments containing the root.

For example:

- If the search text is "index", search results may include "indexing" or "indices";

- If the search text is “run”, search results may include “running” or “run”.

Boolean logic operators can be both concept and stem searches. Table 9-9 lists all supported boolean logic operators.

Table 12-7: Boolean Logic Operators Supported

Operator	Character
And	&
Or	|
Not	~
Grouping	(and)

For example:

- If the search text is “mouse | (cat ~ cow)”, search results will return attachment file content that include “mouse” *or* attachment file content that include “cat”, but do not include “cow”.

Note If your **Advanced Contains** search criteria is complex, (e.g. (cat | dog) & (fish ~ cow) & Mouse), the attachment file content search performance can be greatly hindered.



CHAPTER 13
User Administrator

This chapter is a reference for the user administrator. It has the following sections:

- *About the User Administrator*
- *Administrative Areas of the User Administrator*
- *Viewing and Defining User Properties*
- *Adding New Users*
- *Modifying User Properties*
- *Removing Users*

About the User Administrator

One or several user administrators assist the Agile administrator by creating users and setting their user properties. A user administrator performs these functions in the Agile Advantage Web client. Information about the user administrator from the Agile administrator's point of view is found in the *Agile Administrator 2006 User Guide,* Chapter 10, "Server and User Licenses".

This chapter is from the user administrator's point of view and describes the user administrator's role and capabilities. In this chapter, *you* refers to the user administrator.

If you are assigned the User Administrator role, you can do the following:

- Create and delete users, read and modify all users that are in departments assigned to you by the Agile administrator

- Assign those roles that the Agile administrator has specified that you can assign
- Add, edit, or delete users in the departments you administer
- Assign users to partners
- View licenses and assign licenses to users
- Choose specific escalation persons, as long as they are in the departments you administer

You *cannot* do the following:

- Create, edit, or delete roles and privileges
- Create, edit, or delete departments or partners
- Access any other information in Agile Administrator

Administrative Areas of the User Administrator

You begin user management tasks in Agile Web client by clicking **Settings**. Only Agile users who have been assigned the User Administrator privilege will see the User Administration area; all other users will see only the User Settings section.

The user administrator operates in five principal administrative areas:

- **Users** — On the Users page, you can view, create, modify, and remove Agile Advantage users.
- **Roles** — On the Roles page, you can view predefined roles, assign users to these roles, and remove users.
- **Departments** — On the Departments page, you can view predetermined departments, assign users to these departments, and remove users.
- **Partners** — On the Partners page, you can view predetermined partners, assign users to these partners, and remove users.
- **Licenses** — On the Licenses page, you can view the user licenses and assign appropriate licenses to users.

Viewing and Defining User Properties

The Agile administrator must consider the access, permissions, departments, and roles that your users require. Appendix H, "New User Worksheet", in the *Agile Administrator 2006 User Guide* can help consolidate the required information about new users. This worksheet lists every user property with a place to record the settings for the new user. The Agile administrator may use this or a similar worksheet to list a new user's information; a user administrator refers such worksheets in creating new user accounts in the Agile Web client.

User properties are first configured when the user account is created, by either the Agile administrator (in Administrator) or the user administrator (in the Agile Web client). They can be modified later. All users have the same properties (see Table 13-1).

The Agile administrator determines which user properties you can configure. If the Agile administrator accepts the default, you can configure all the user properties *except* the following (see the exception below):

Agile ChangeCAST Access	Change Analyst List
Change Analyst Searches	Component Engineer List
Component Engineer Searches	Program Manager Searches
Quality Analyst Searches	Quality Analyst List
Quality Administrator Searches	Quality Administrator List

However, if the Agile administrator includes these properties when he sets your Modifiable User Properties, you can set these for users as well.

Six user properties are not set in Administrator:

Date Format*	Daylight Saving
Time Format*	Rows Per Web Page*
Time Zone*	Show Web Page Tips

*These three properties appear blank if the user is created in Administrator.

The user sets these properties in the Agile Web client when first logging in. If you create the user in the Web client, all these properties show default values that appear in Administrator; when the user alters any of these six properties, the value is refreshed in Administrator immediately.

The following table lists and describes user properties. The default setting is underlined.

Table 13-1: User Properties

Property	Required	Description
Username	Yes	The user's Agile Advantage login ID/username. It must be unique in the Agile Advantage address book. The maximum is 50 characters.
Name	Yes	The user's full name. It must be unique in the Agile Advantage address book and cannot exceed 29 characters in length.
Phone	No	The user's phone number (for informational purposes only).
Mobile Phone	No	The user's mobile phone number (for informational purposes only).
Fax	No	A valid fax number (for informational purposes only).
Address	No	The user's full address.
Comment	No	The Agile administrator (or user administrator) may enter a comment about the user. The field allows 99 characters maximum. The user does not see the comment.
Email	Yes, if created in the Web client	The user's valid email address for change notification and routing. *Example*: danny.design@agile.com
EmailAttachment Type	Yes, if created in the Web client	Email attachment type to be included on all notifications and email that this user sends from within Agile Advantage. When an object is sent from the Agile Advantage Windows or Web client, it includes an icon that the recipient can use to start the application and open the object. The following are the attachment types: • Agile — starts Agile Advantage Windows Client • Web Client — starts Agile Advantage Web Client **Note:** If an Agile Advantage Web client user is having difficulty opening an object, it is recommended that you assign him *both* attachment types.

Table 13-1: User Properties

Property	Required	Description
EmailEncode Type	Yes	Used to encode the icon attached to Agile email notifications. This icon lets users start the Agile Advantage Windows or Web client from their email to view change notifications. *Settings* = MIME or UUENCODE
Organization	No	The organization the user belongs to.
Contact List	No	Controls whether a user will be displayed on the contacts list when one attempts to add a contact to the Contacts tab of a Manufacturer, Supplier, or Customer. *Settings* = Yes or No
Department	No	The user's department assignments for the Agile Advantage Address Book. All users must be assigned to at least one department; a user without a department cannot be managed by any user administrator.
Global Group	No	The user's global group assignments for the Agile Advantage address book.
Password	Yes, if req'd. in acct. policy	The user's Login and Approval passwords. Check **Use Login Password** to use one password for both. Check the password expiration boxes to override account policy. Passwords are case-sensitive.
Role	No (to create user, but *Yes* to see objects)	The user's role assignments. This property determines a user's access to the objects in Agile Advantage from the point of discovery forward.
ReceiveChange Notification	Yes	Used to indicate if the user will receive email notifications for which she is assigned as an approver or observer and, more generally, any type of notification of change and package objects. *Settings* = Yes or No

Table 13-1: User Properties

Property	Required	Description
License	Yes	The named user license assigned to this user; see the Administrator User's Guide for details. A user cannot be removed from a specific license, the user must be assigned another license.
Allow Escalation Designation Approval	Yes	If the user has identified a designated escalation person (DEP), this setting determines when that person can approve or reject a change. *Settings*: After Escalation — The user's DEP can approve a change only after it has been escalated. Always — The user's DEP can always approve or reject a change.
Allow User Profile Modification in Web Client	No	Allows users to modify their User Profile in the Web client. In certain cases, you might have a security policy to restrict certain users from doing so.
Agile ChangeCAST Access	Yes	Allows users to run ChangeCAST. Any number of users may run Agile ChangeCAST, but only one may run it at a time. *Settings* = Yes or No
Change Analyst List (with license for change collaboration only)	Yes	Controls whether the user's name appears in the **Change Analyst** drop-down list on the Cover Page of engineering change orders. *Settings* = Yes or No
Change Analyst Searches (with license for change collaboration only)	Yes	Controls whether a user would have the following in the Agile Advantage Windows client or Web client: • A Change Analyst Searches folder • Change Analyst queries in My Inbox *Settings* = Yes or No
Component Engineer List (with license for Manufacturer Management features only)	Yes	Controls whether the user's name appears in the **Component Engineer** drop-down list on the Cover Page of manufacturing change orders. *Settings* = Yes or No
Component Engineer Searches (with license for Manufacturer Management features only)	Yes	Controls whether a user has a Component Engineer Searches folder in the Agile Advantage Windows client or Web client. *Settings* = Yes or No

Table 13-1: User Properties

Property	Required	Description
Program Manager Searches (with license for packages only)	Yes, if Package license	For sites that work with package objects: controls whether the user's name appears in the **Program Manager** drop-down list on the Cover Page of package objects. *Settings* = Yes or No
Program Manager for Partners (with license for packages only)	No	The partners for which this user is program manager (for sites that work with package objects).
Partner Company Name (with license for packages only)	No	The user's partner company assignments (for sites that work with package objects).
Quality Administrator List (with license for quality tracking features)	Yes	Controls whether the user's name appears in the **Quality Administrator** drop-down list on the Cover Page of CARs. *Settings* = Yes or No
Quality Administrator Searches (with license for quality tracking features)	Yes	Controls whether a user has a Quality Administrator Searches folder in the Agile Advantage Windows or Web client. *Settings* = Yes or No
Quality Analyst List (with license for quality tracking features)	Yes	Controls whether the user's name appears in the **Quality Analyst** drop-down list on the Cover Page of problem reports and issues. *Settings* = Yes or No
Quality Analyst Searches (with license for quality tracking features)	Yes	Controls whether a user has a Quality Analyst Searches folder in the Agile Advantage Windows or Web client. *Settings* = Yes or No
Supplier Restricted User	Yes	Controls whether a user has a restricted use of the system as set in a Supplier User role. For example, users logging in from a Supplier site would not have the privilege to view other suppliers, the components they supply, and hence their cost. *Settings* = Yes or No
Sourcing Searches	No	Controls whether a user has a Sourcing Searches folder in Agile.
Active Directory	No	Controls whether Active Directory integration is to be used or not with this user. *Settings* = Enable or Disable.

Table 13-1: User Properties

Property	Required	Description
Date Format	No	The format in which dates are displayed to the user. Set by user in the Web client; Read Only in Administrator. The default is MM/dd/yyyy if the user account is created in the Web client; the property is blank if created in Administrator.
Daylight Saving	No	When set to Yes, the system automatically advances standard time one hour in the spring and sets it back one hour in the autumn. Set by user in the Web client; Read Only in Administrator.
Pager	No	The user's pager number (for informational purposes only).
Rows Per Web Page	No	The number of rows that appear in the user's Agile Advantage Web client user interface. Set by the user in the Web client; Read Only in Administrator. The default is 10.
Startup URL	No	The user's default Internet or intranet home page address in URL format, such as http://www.agile.com. This setting is used by the **Internet** button in the Windows client; it is not used by the Web client.
Time Format	No	The format in which times are displayed to the user. Set by the user in the Web client; Read Only in Administrator. The default is hh:mm:ss aaa (aaa = AM or PM) if the user account is created in the Web client; the property is blank if the user is created in Administrator.
Time Zone	No	The time zone where the user is located. Set by the user in the Web client; Read Only in Administrator. The property is blank if the user is created in Administrator.

Adding New Users

Once you have assessed new users' access requirements and assembled information about them in the "New User Worksheet," you can begin the process of adding users in the Agile Web client.

Before You Begin

Consider the following details before adding a new user.

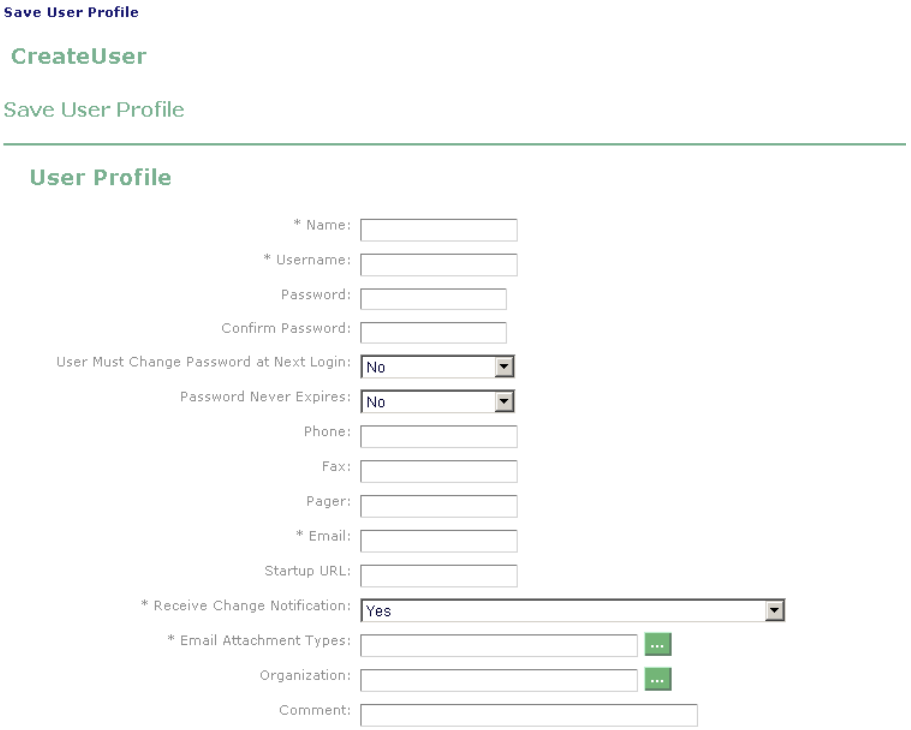
- What does this user need to be able to do in Agile Advantage?
- What should this user be prevented from doing in Agile Advantage?
- Will this user require access to Agile ChangeCAST?
- Will this user's name appear in the Agile Windows or Web client **Change Analyst** drop-down list? the **Component Engineer** list? the **Program Manager** list? the **Quality Administrator** or **Quality Analyst** list?

See the "New User Worksheet" from the *Agile Administrator 2006 User Guide* for compiling the required information for adding a new user.

To add a new user:

1 Click **Settings** > **Users** > **Create.** The Create User wizard appears (Figure 13-1).

Figure 13-1: User Profile Page for New User



2 Type the following required information in the User Profile section (if you leave any required fields blank, the system does not add the user; also, see the Note about passwords):

- **Name** — new user's name
- **Username** — new user's login ID/username
- **Password** — new user's password
- **Confirm Password** — new user's password, repeated

Note Passwords are case-sensitive. For example, if you enter the password here in all capital letters, then the user must always enter the password in all capital letters when logging in to Agile Advantage.

- **Email** — new user's email address (complete)
- **Receive Change Notification** and **Email Attachment Types** — see definitions in Table 13-1. To enter a value for **Email Attachment Type**, click the button, select a type, click the right arrow, and click **OK**.

3 Fill in the rest of the fields in the User Profile section as needed. These include **Phone**, **Fax**, **Pager**, **Startup URL**, and **Comment**.

Figure 13-2: User Profile Page, Bottom Portion



4 Scroll down and enter the information in the Locale Information section. The fields preceded by asterisks (*) are required. The following fields have default values, which you can accept (these are used for the Web client only, not for the Windows client):

- **Date Format** — how dates appear on the user's computer
- **Time Format** — how clock time appears on the user's computer
- **Time Zone** — the time zone where the user is located
- **Adjust for Daylight Saving** — whether the computer observes daylight savings time

5 Scroll down and enter the information in the Preferences section. The following fields are not required; they have default values that you can accept:

- **Rows Per Web Page** — the number of rows that appear in the user's Agile Advantage Web client user interface

6 Click **Next**. The User Settings page appears. Fill in the fields, which include **Role**, **Department**, **Partner**, and **Global Group**. Remember that you see only those entities to which you can assign users; for instance, you see only those departments that have been selected for you to assign, not all the departments that have been created in the Agile Advantage system.

The required fields (which have defaults) on the User Settings page are **License**, **Email Encode Type**, **Allow ChangeCAST Access**, and **Allow Escalation Designation Approval**.

The following fields are not available unless the Agile administrator has assigned the appropriate properties to you (via the Modifiable User Properties setting in your User Administrator privilege mask): **Change Analyst List**, **Change Analyst Searches**, **Component Engineer List**, **Component Engineer Searches**, **Program Manager Searches**, and **Allow ChangeCAST Access**.

7 Click **Next**. The Save User Escalations page appears. The **Criteria** field allows you to select from the list of available workflows (the default list includes the six default workflows). In the **Escalation User** field, select from among the individual users, or the collective Users, Departments, Groups, and Partners.

8 To save your changes and close the wizard, click **Finish**. The Create User wizard closes, and the new user's name is added to the list on the Users page.

9 To confirm the addition and review the new user's properties, return to the Users page, and click the new user's name in the alphabetical list. The new user's properties appear filled in on the User *name* page.

Modifying User Properties

You can modify any of the properties for existing users from the Users page. The following is a general process for changing property settings.

To modify a user property:

1 Click **Settings** > **Users**. An alphabetical list of the current users appears.

2 Click the user's name in the list.
Properties appear on the **User Profile** page.

3 Click **Edit**. The user's properties are now editable.

4 Enter a new value in the field you want to change. Depending on the field selected, you either directly edit the field, make a selection from a drop-down list, or make changes in a dialog box.

5 When you have finished making changes, click **Save**. If you decide not to make any changes to the existing profile, click **Cancel**.

Removing Users

To remove a user, you must remove the user's name from the **Users** node. As soon as you do so, Agile Administrator automatically removes the name from most lists in Agile Advantage, and the user can no longer access Agile Advantage.

Note If you are a user administrator in the Agile Advantage Web client, you will *not* know when a user is deleted by the administrator using Agile Administrator unless you try to alter the removed user's properties. Also, you cannot undelete users from the Agile Advantage Web client.

You can remove users even if they are listed as the originator of an ECO. Their names still appear as the originator to maintain the integrity of the data history.

To remove a user:

1 Click **Settings** > **Users**.
On the **User Profile** page, check the box next to the user's name.
You can check multiple users to remove in one operation.

2 Click the **Delete** button. A message asks you to confirm the deletion.

3 To complete the deletion, click **OK**. The dialog box closes, and the user's name is removed from the **Users** node and from all lists in Agile Advantage.

Note When you delete a user's name, you cannot add that name again. The user's name can be restored, however, in Administrator.

A user cannot be deleted if she is named in an active workflow, Notification property, or the **Designated Escalation Person** node of any user, or is the "To" user in a signoff authority transfer. If you attempt to remove a user involved in these cases, you receive an error message indicating specifically where the user appears. Use the Global Replace tool (in Administrator) and the procedure that follows (see also "Global Replace" in Chapter 3 of the *Agile Administrator 2006 User Guide*).

To remove a user from signoff authority transfers:

1. Log in to the Agile Advantage Windows client or the Agile Advantage Web client. You must have the Transfer Authority for Others privilege.
2. Choose **Tools | Transfer Authority | Modify**.
3. Modify authority transfers where the To user is the user you want to remove. For detailed information, see the *Agile Advantage 2006 Windows Client User Guide*.



CHAPTER 14

Data Access, Extraction & Reporting

This chapter describes the Agile Advantage Data Access, Extraction and Reporting Solution. The main sections include:

- *Introduction*
- *Example Scenarios for Exporting Object Data*
- *The Data Extraction Functionality*

Introduction

You can export any Agile Advantage object so that you can open, view, and manipulate object data with external tools and applications. You can export specific object tab properties, entire object properties, or selected object search results. The exported file format can be either a Comma Separated Value (CSV) file, or a Product Data eXchange (PDX) package (for more details on PDX packages, see the *Agile eXpress 2006 Professional User Guide*).

Example Scenarios for Exporting Object Data

There are many example scenarios for exporting your object data:

Use Case 1: Export Search Results

Exporting search results is a very simple export scenario: you can highlight particular objects from your search results and have them exported to a file (CSV or PDX) so users can manipulate the data (e.g. to add some cost information).

Note Search results may yield thousands (e.g. 50,000 records) of objects to export. You can set the maximum number of rows to export in Agile Administrator (for more details, see Chapter 11, "Preferences" in the *Agile Administrator 2006 for Agile Advantage User Guide*).

Use Case 2: Export for Supply Chain

This is a more complex export. It enables the export of all item-related information into a single cohesive file. You can send all the data needed by a supplier to enable them to manufacture an assembly or subassembly. This includes the necessary information to procure, manufacture, test, and ship the assembly.

Supply chain members can also export the objects data themselves by enabling them to generate PDX packages from the Agile Web Client (for more details, see the *Agile Advantage 2006 Web Client User Guide*).

Use Case 3: Export a Specific Tab

There are several tabs within each Agile Advantage class, and each tab contains different data. You can export data from a specific tab. For example, you can export data from the **History** tab to provide adequate proof for compliance issues.

Use Case 4: Export a Hierarchical Tab

Exporting a hierarchical tab involves exporting BOM tabs that involve data from other tab sources. You might export the BOM tab to perform an analysis process on it.

Consider the following cases:

- A compliance auditor needs to acquire a report that outlines some specific compliance values for one of his products. Knowing that there is a compliance tab that indicates whether or not an item is compliant, the auditor can export either the top level or all levels of the product's BOM with each item's (in the BOM) compliance value appended to the report.

- A procurement person working on a cost reduction effort with his suppliers needs to export the entire BOM of a specific product. The exported file includes all BOM levels along with quantity component information and current cost information appended to each item in the BOM. Such consolidated information is impossible to acquire directly from the Agile BOM view.

Use Case 5: *Export a Product for Compliance Review With 3rd Party Manufacturer Parts Content Providers*

You can export all item-related information (including AML data) to CSV for content review for End of Life (EOL), crosses to similar parts, including Lead-Free and RoHS compliance information. After the exported data is reviewed and updated by 3rd party MPN content providers, you can use Agile Import to update your Agile Advantage system.

The Data Extraction Functionality

The following details the different data extraction functionalities in the system.

Note Make sure you have the necessary privileges to use the Export functionality.

- ❑ Export to CSV
- ❑ Export to PDX

Export to CSV

To export either a selected object tab or the entire selected object tabs:

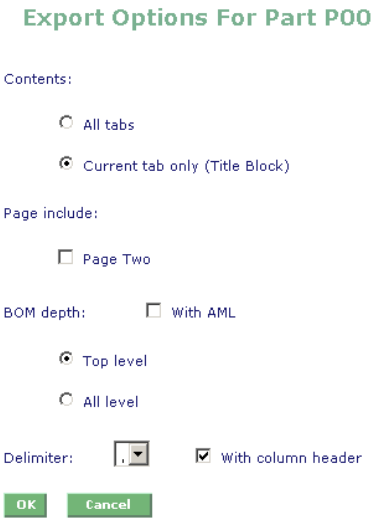
1. Open the required object.
2. Choose **Export** from the **Actions** menu on the right side of the page.

Figure 14-1: Export on the Actions Menu



The **Export Options For** the selected object page appears.

Figure 14-2: Export Options For Part 1000-02



Some fields might not appear depending on what tab you are exporting from:

3 Under **Contents:**

- Select **All tabs**, to export the entire selected object tabs
- Select **Current tab only** (e.g. BOM), to export only the selected object tab

4 Under **Page Include:**

- Check **Page Two** and/or **Page Three** to include **Page Two and/or Page Three** tab data in your exported report

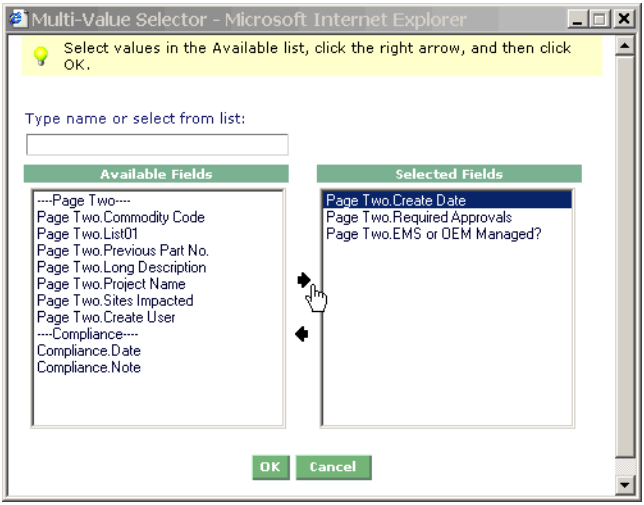
5 Under **BOM depth:**

- Select the desired BOM depth level to include in your exported report: (**Top level**, **All level**)
- Check **With AML**, to include AML tab data in your exported report

6 Under **Page Two and Compliance Field(s):**

- Click on the ... button.
  The **Multi-Value Selector** window appears.

Figure 14-3: The Multi-Value Selector Window



- Select which fields to include in your exported report by highlighting and clicking the **Move Right** arrow.
  Click **OK**.

7 Under **Delimiter:**

- Select the appropriate CSV file delimiter to use in your exported report: (“,”, “|”, “/”)
- Check **With Column Header**, to include column headers in your exported report.

8 Click **OK**.
You are prompt to Open or Save the CSV file on your machine.

To export a selected set of Quick Search results into a CSV file:

1 Perform a Quick Search.

2 Check the objects you want to export from the **Search Results** window.

3 Click the **Export** Export button.
You are prompt to **Open** or **Save** the CSV file on your machine.

To export a selected set of Advanced Search results into a CSV file:

1 Perform an Advanced Search.

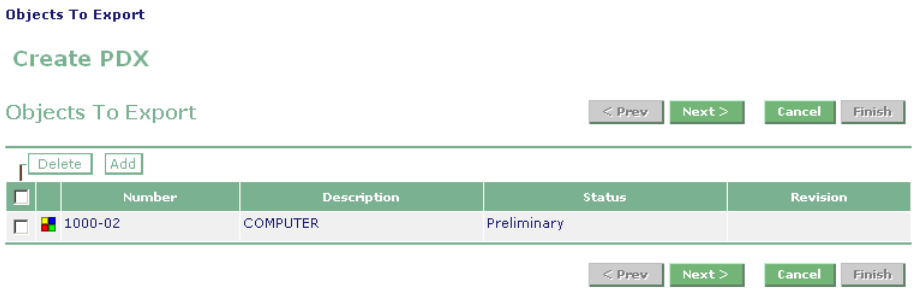
2 Click the **Export** Export button.
You are prompt to **Open** or **Save** the CSV file on your machine.

Export to PDX

To export an object or multiple objects to PDX:

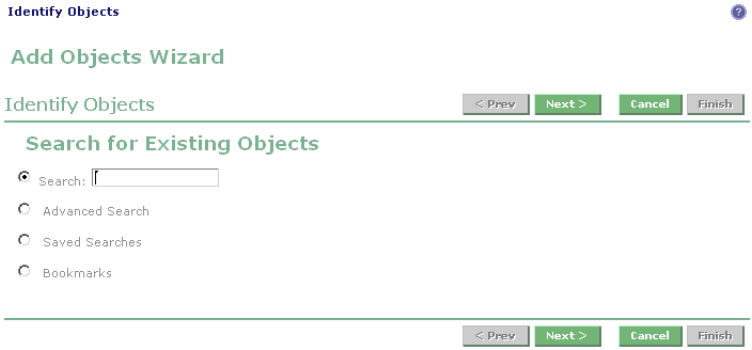
1 Click on **Create | PDX**.
The **Objects To Export** page appears.

Figure 14-4: The Objects To Export Page



2 Click the **Add** Add button to add the object you want to export.
Use the **Add Objects Wizard** to search and add existing objects.

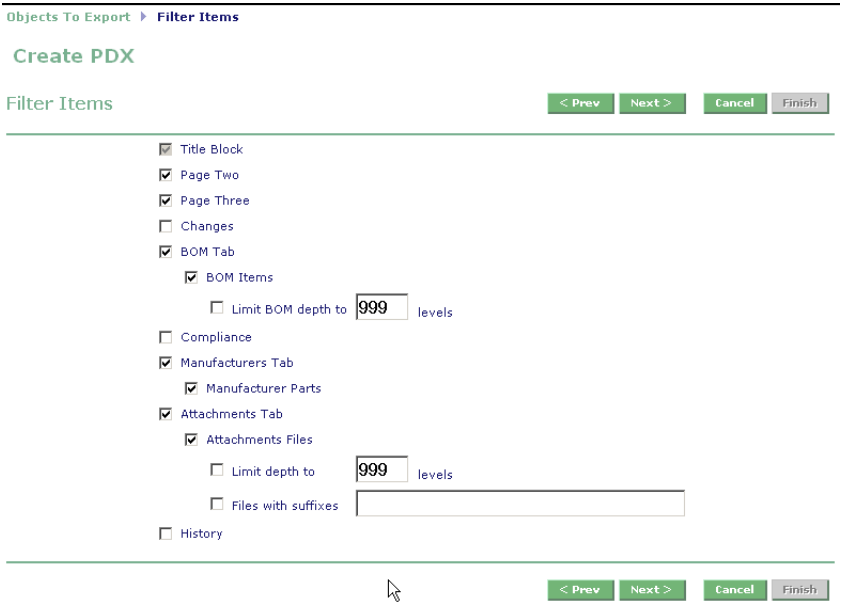
Figure 14-5: The Add Objects Wizard



Note If you want to directly export a particular object, open that object then perform step 1 and skip step 2.

3 Click **Next**. The **Filter Items** page appears.

Figure 14-6: The Filter Items Page



4 Check the Item you want to export. You can also specify the BOM level depth to export.
Click **Next**.
The **Filter Manufacturer Parts** page appears.

Figure 14-7: The Filter Manufacturer Parts Page



5 Check the Manufacturer Parts information you want to export. Click **Next**. The **Filter Manufacturers** page appears.

6 Check the Manufacturers information you want to export. Click **Next**. Depending on the information you checked, the **Select Attachments** page might appear:

- Uncheck the Attachments information you don't want to export. Click **Next**. The **Define PDX Header** page appears.

7 In the **Define PDX Header** page, enter the **Package ID**, **Type** and **Description**. Click **Next**. The **Download PDX Package** page appears.

8 Verify the **Package Header** and **Objects Added** information. Click the **Download PDX Package** button.

9 **Open** or **Save** the generated PDX file. When download is complete, you are prompt to **Open** or **Close** the PDX file when the download is complete.

10 When download is complete, click **OK** on the **Get PDX File** window. Click **Finish**. The export to PDX process is complete.

To export a selected set of Quick Search results into a PDX file:

1 Perform a Quick Search.

2 Check the objects you want to export from the **Search Results** window.

3 Click on **Create | PDX**. The **Objects To Export** page appears.

4 Follow step 3 to step 10 above.

To export a selected set of Advanced Search results into a PDX file:

1. Perform an Advanced Search.
2. Check the objects you want to export from the results window.
3. Click on **Create | PDX**.
   The **Create PDX** window appears.
4. Follow step 3 to step 10 above.



CHAPTER 15
Help For Power Users

This chapter gives additional information about topics of interest to Agile administrators and others who need in-depth information about the Agile Advantage Web client. Topics include:

- *Change Workflows*
- *Details About the Discovery and Read Privileges*
- *Part versus Document?*
- *Changing an Item's Subclass*
- *About Matching Criteria in Workflows*
- *Details About Revision Display on BOMs*
- *Program Manager Searches*

Change Workflows

The table below shows the typical flow of a change through the change control process when you use the Agile default workflows.

Table 15-1: Status of Changes Throughout the Change Control Process With Default Workflows

Sequence	ECO	ECR	Deviation	Stop Ship	MCO
1st	Pending	Pending	Pending	Pending	Pending
2nd	Submitted	Submitted	Submitted	Submitted	Submitted
3rd	CCB	CCB	CCB	CCB	CCB
4th	Released	Released	Released	Released	Released

Table 15-1: Status of Changes Throughout the Change Control Process With Default Workflows

Sequence	ECO	ECR	Deviation	Stop Ship	MCO
Final	Implemented	Closed	Expired	Resumed	First Article Completed

Alternatively, if the status of a change is Pending, Submitted or CCB, the originator or change analyst can switch that change to the Hold status or the Canceled status.

Note Workflows at your site may be different from those described here. Your Agile administrator may have modified the default workflows, or may have created custom workflows for your company.

For details about these processes, including Agile workflows, see Chapter 6, "Changes."

Details About the Discovery and Read Privileges

Agile change collaboration functions are limited by the user's Discovery privilege. For example, you cannot submit a change to a change analyst who cannot discover that change. For more information, see Chapter 6, "Changes."

The Agile administrator can use the Discovery privilege to limit discovery of objects in the following ways:

- Prevent a set of users from seeing certain objects when they run a search. These objects are not displayed on the results table, even though they meet the search criteria. The Agile administrator can specify whether or not to display a warning message at the bottom of the search results page.
- Prevent a set of users from seeing certain objects that are listed on these tables:
  - Affected items
  - Where used
  - Manufacturers
  - Changes

  The Agile administrator can specify whether to display a warning message.

- Prevent a set of users from seeing certain objects on the **BOM** tab. The Agile administrator specifies whether or not to display a warning message. The Agile administrator also has the option of displaying either the item number only or the item description only on the **BOM** tab, so the user can see a complete BOM, but does not have access to the undiscovered items.

Note that while one set of users is prevented from seeing certain objects or fields, other users with different Discovery privilege and Read privilege settings are capable of seeing those same objects and fields.

The creator of an object is always able to read and discover the object he created, even when he has not been granted Discovery privilege for that object.

Discovery and Read privileges are assigned by the Agile administrator. If you have questions about your Discovery privileges or Read privileges, see your Agile administrator.

Displaying Non-viewable Fields

If you do not have the appropriate Read privileges for a field, the words No Privilege appear in the field.

If a copy of a non-readable field appears in another object or in a table, the words No Privilege appear there also. For example, if you do not have Read privilege for the **Description** field of changes, when those changes are listed in a table, the words No Privilege also appear in the **Description** field of that table. Following are examples of tables where objects may be listed:

- Search results
- Pending changes
- Change history
- Manufacturers
- Where used
- Affected items
- Audit results

On the BOM table only, the SmartRule that determines how non-discovered items are displayed on the BOM table is also applied to the non-readable fields. See "How Discovery and Read Privileges Affect What You See on the BOM Tab" on page 8-3.

Part versus Document?

In general, if the document is shipped as part of a product, or it has costs associated with it, create it as a part object. If the document is an internal document, procedure, or reference, create it as a document object.

In certain cases, though, you may want to create a document as a part. Here are three examples illustrating when you might choose to create a document as a part object or as a document object.

Example 1 — If a document is the controlling document for a part (that is, it has the same number as the part), create that document as a part object.

For example, if you have an engineering drawing number 123 that specifies and describes part number 123 (thus the document controls the part), create part 123 and include the engineering drawing as an attachment.

Use this method if the part number *must* be the same as the document number. Note that the document does not exist as a separate document object in the Agile database.

In contrast to the above example, if it is *not* necessary for the drawing number and part number to be the same, create a document object (for example, document number 222) and add the engineering drawing to its **Attachments** tab. Then create a part object (for example, part 444). Add document 222 to the **BOM** tab of part 444 with a Qty of zero or Reference. Enter zero as the find number; this forces a document object to appear at the top of the **BOM** tab for easy reference.

Example 2 — If the document has costs associated with it, or it is shipped as part of a product, create it as a part object.

An example of a document that is shipped with a product is a manual. A manual might have a bill of material that includes the binder, labels for the binder, binder tabs, and the printed document itself.

If a document goes to your customer with a product, create it as a part object, even if it does not have a bill of material. Examples of such a document might be a warranty card, an instruction booklet, assembly instructions, or a printed software licensing agreement.

If the document has costs associated with it, such as printing costs, create it as a part object. When you add the document part to a **BOM** tab, and you enter a quantity of 1, the costs of the document part object are included in any reports that compute costs. See the *Agile Advantage 2006 Windows Client User Guide* for information about running reports.

Example 3 — If the following applies to a document, create it as a document object:

- It does not need to have the same number as a part.
- It is not shipped as part of a product.
- It does not have costs associated with it.

Examples of such documents might be a manufacturing process (a Quality Assurance procedure, a test procedure, or manufacturing instructions) or a reference document (a specification or an engineering drawing).

Create any internal company documents as document objects.

Note Because the Agile Advantage Web client is so flexible, you are not required or forced to use the approach outlined in the above examples when creating documents. You should, however, always follow your company's policies or guidelines when creating a document as a part object or as a document object. If you have questions, see your Agile administrator.

If you create a document object, and later want to change it to a part object, you can hard-delete the document object (in the Agile Advantage Windows client only), which removes it from the database and frees up the item number. Then you can create the document as a part object, using the same item number. For more information, see "Deleting Items" on page 3-19.

Changing an Item's Subclass

If you have the appropriate privileges, you can change the subclass of an item. For example, you can change the subclass of a particular document from Specification to Data Sheet.

Caution! When you change the subclass of an item, its data fields change, and all previous information about the **Page Three** section is cleared.

To change the subclass of an item:

1. On the **Title Block** tab of the item, click  in the **Part Type** field, and select a new subclass from the drop-down list.
2. If **Page Three** is visible and has data, a warning message appears, alerting you that all Page Three data is cleared.
   - Click **OK** to continue changing the subclass and to allow **Page Three** to be cleared.
   - Click **Cancel** to cancel the change subclass process; no changes are made to the item.
3. If the new subclass has an autonumber scheme assigned in Agile Administrator, the Agile Web client asks you if you want to select a new autonumber for the new subclass.
   - Click **Yes** to continue the process of changing the number.
   - Click **No** to change the subclass but retain the existing number.
   - Click **Cancel** to abort the change subclass process, with no changes made to the item.

     If the new subclass does not have an autonumber scheme assigned in Agile Administrator, the process is completed; the subclass is changed but the number is not changed.
4. Depending on your system configuration:
   - If there is one autonumber source designated for the new subclass, the Agile Web client automatically assigns a new number. Go to step 5.
   - If more than one autonumber source is designated for the new subclass, you are prompted to select the autonumbering scheme for the item. Select the new autonumbering scheme for this item. Go to step 5.
   - If autonumbering is required in your system, and more than one autonumber source is designated for the new subclass, a different warning is displayed.

     Click **Yes** to select a different autonumber source. Go to step 5.

     Click **No** to use the same autonumber source. Go to step 5.

     Click **Cancel** to cancel the change subclass process; no changes are made to the item.

Note If the item is in use, you may see a dialog box alerting you that the item is locked. Click **OK**; the change subclass process is canceled.

5 The Agile Web client automatically autonumbers the item, displays the new number in the **Number** field, and enters the event on the **History** tab of the item.

About Matching Criteria in Workflows

Matching criteria are used to find which workflows may be used for each change. Agile Advantage matches each change to a list of valid workflows for that change.

Your Agile administrator selects matching criteria from a list of reusable criteria. A reusable criteria is a database query, just like an advanced search. See "Using the Search Pane" on page 12-8. Reusable criteria are named and defined in Agile Administrator.

Some examples of possible reusable criteria are:

- **All MECOs** — finds all the changes that are MECOs (Mechanical ECOs).
- **Scorpio ECOs** — finds all the ECOs that include "Scorpio" in the **Product Line(s)** field of the change.
- **Libra Project** — finds all the change orders that have any items on the **Affected Items** tab that contain "Libra" in the **Product Line(s)** field of the item.

By specifying a list of reusable criteria for each workflow, the Agile administrator limits which changes can use a specific workflow. For example, the Agile administrator might create a workflow named General Use, and select the three reusable criteria named above (All MECOs, Scorpio ECOs, and Libra Project) as **the matching criteria for that workflow.**

Example 1: If you create a change that is a Mechanical ECO (MECO), it matches one of the matching criteria of the General Use workflow (All MECOs). The General Use workflow appears in the **Workflow** drop-down list on the **Cover Page** tab of the change.

Example 2: If you create a change that is an ECO that includes "Scorpio" in the **Product Line(s)** field of the ECO, it matches one of the matching criteria of the General Use workflow (Scorpio ECOs). The General Use workflow appears in the **Workflow** drop-down list on the **Cover Page** tab of the change.

Example 3: If you create a change order and add items to its **Affected Items** tab that contain "Libra" in **Product Line(s)** field, Agile Advantage examines the **Product Line(s)** field on the **Affected Items** tab for every affected item. The General Use workflow appears in the **Workflow** drop-down list on the **Cover Page** tab of the change depending on the Criteria Matching Type setting for the workflow:

- **Some** — One or more (but not all) affected items must match the affected item–based reusable criteria, in this case, Libra Project.
- **All** — When multiple affected item–based reusable criteria are used as matching criteria, each affected item must match at least one affected item–based reusable criteria; however, each affected item does not have to match the same reusable criteria.
- **Same** — All affected items must match the same affected item–based reusable criteria, in this case, Libra Project.

Note As you add items to the **Affected Items** tab and complete the fields on the tabs of the change, the **Workflow** drop-down list on the **Cover Page** tab may vary, depending on which matching criteria apply at the moment. Contact your Agile administrator if you have questions about the matching criteria of a specific workflow.

The Criteria Matching Type setting also applies for each status in the workflow. For detailed information about workflows and Criteria Matching Type, see the *Agile Administrator 2006 User Guide*.

Details About Revision Display on BOMs

The revision number (or letter) that appears in the **Rev** field of the BOM table is calculated by checking the release date of the parent item, if already released, then locating the latest revision of the child item prior to that date and analyzing it. If the parent item hasn't been released, the most recent revision of the child item is found.

The child item revision is analyzed according to three criteria:

- Its lifecycle phase (Preliminary or other)
- Whether there are any released revisions of the child item
- Whether there are any pending revisions of the child item

Depending on which revision of the parent you select, the child revision displayed may or may not be the latest revision of that child item. The following is an explanation of which child revision appears:

- The latest revision of the parent item always displays the latest revision of the child item. This means that the parent BOM reflects any changes that may be made to the child item since the parent revision was released. This applies until the next revision of the parent is released.
- The rev shown for a child item of any past revision of the parent item is the latest revision as of the time just preceding the next parent revision.
- For each child item, the lifecycle phase appears that corresponds to the displayed revision.

  The child item may display a blank **Rev** field if it has no revision number as of the parent revision. This occurs if the child item has never been released as of the present moment, if you are viewing the latest parent revision, or if it had not been released by the time of the next occurring parent revision, if you are viewing past parent item revisions.

Caution! Be aware that the unrelease and release of child items may affect the child revisions displayed on the parent bill of material.

Program Manager Searches

This section shows the construction of global program manager searches included with Agile Advantage. You can use these searches as samples and tips for building your own searches.

This section contains the following topics:

- Searches in the Program Manager Searches Folder
- Program Manager Searches in the Public Inbox

If you have the Global Search privilege, you can modify, delete, or create new editable Agile packages system searches. For more information about global searches and system searches, see “Predefined System Searches” on page 12-5.

Searches in the Program Manager Searches Folder

These searches are grouped together where program managers can easily find them.

Packages for my Partner(s) that were Submitted More Than 1 Day Ago

Find Agile packages in a Submit type status that have been in that status for longer than 24 hours.

[	Cover Page.Status Equal To Status Type.Submit		And	
	Workflow.Duration Greater Than or Equal to 24	]		

Packages for my Partner(s) that were Submitted More Than 3 Days Ago

Find Agile packages in a Submit type status that have been in that status for longer than 72 hours.

[	Cover Page.Status Equal To Status Type.Submit		And	
	Workflow.Duration Greater Than or Equal to 72	]		

Packages for my Partner(s) that were Submitted More Than 7 Days Ago

Find Agile packages in a Submit type status that have been in that status for longer than 168 hours.

[	Cover Page.Status Equal To Status Type.Submit		And	
	Workflow.Duration Greater Than or Equal to 168	]		

Packages for my Partner(s) that were Submitted More Than 14 Days Ago

Find Agile packages in a Submit type status that have been in that status for longer than 336 hours.

[	Cover Page.Status Equal To Status Type.Submit		And	
	Workflow.Duration Greater Than or Equal to 336	]		

Packages for my Partner(s) that were Submitted More Than 21 Days Ago

Find Agile packages in a Submit type status that have been in that status for longer than 504 hours.

[	Cover Page.Status Equal To Status Type.Submit		And	
	Workflow.Duration Greater Than or Equal to 504	]		

Packages for my Partner(s) that were Deleted Packages

This system search is not editable. The search finds all the soft-deleted Agile package objects. Because Agile packages have workflows, they follow the same general rules for soft-deleting, undeleting, and hard-deleting changes. An Agile package can be deleted only if it is at the Pending type status or the Unassigned status. For more information about deleting Agile package objects, see "Deleting Changes" on page 6-51.

Program Manager Searches in the Public Inbox

The following predefined system searches appear in your Public Inbox if you are a program manager.

Note You cannot view the search conditions of these searches using the Agile Advantage Web client; you must use the Agile Advantage Windows client to do so.

Packages Submitted to Me

Find the Agile packages that have been submitted to me (current user). Note that search condition grouping is not used.

	Cover Page.Status Equal To Status Type.Submit		And	
	Cover Page.Program Manager Equal To $USER			

Packages in Review for which I am the Program Manager

Find the Agile packages that are in a Review type status and for which I (current user) am the program manager. Note that grouping is not used.

(	Cover Page.Status Equal To Status Type.Review		And	
	Cover Page.Program Manager Equal To $USER	)		

Rejected Packages for which I am the Program Manager

Find packages where I am the program manager and one or more approvers have rejected the change.

	Cover Page.Program Manager Equal To $USER		And	
[	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Approver Action Contains Rejected	]	And	

(	Cover Page.Status Equal To Status Type.Review		Or	
	Cover Page.Status Equal To Status Type. Release	)		

Acceptable Packages for which I am the Program Manager

Find changes where I am the change analyst and the changes are ready for release.

[	Signoff.Next Status Equal To Status Type.Released		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Approver Action Does Not Contain Awaiting Approval	]	And	
	Cover Page.Program Manager Contains $USER			



CHAPTER 16

Sample Searches and Search Tips

This chapter shows the construction of global and sample searches included with Agile Advantage. You can use these searches as samples and tips for building your own searches.

The chapter discusses these topics:

- *Default System Searches*
- *Finding Objects with or without Attachments*

Default System Searches

When the Agile Advantage system is first installed, many predefined system searches are available by default. A user with Global Search privilege may delete or modify default system searches.

This section contains the following topics:

- Global Searches Folder
- Change Analyst Searches
- Component Engineer Searches
- Quality Analyst Searches
- Quality Administrator Searches
- Workflow Search Samples

- Public In-box Searches

The following table describes the global, change analyst, My In-box, and personal searches.

Note Some of these searches are not editable in the Agile Web Client. You must edit them in the Agile Windows client.

Table 16-1: Predefined system searches

Predefined search	Edit/ view	Which objects are found
Global Searches folder		
All Deviations About to Expire	No	All deviations that have an expiration date within one week of today
All Released Stop Ships	Yes	All stop ships with the status type equal to Released or Complete
Unreleased Changes That I Created	Yes	All unreleased changes (**Date Released** field blank) of which I am the originator
Released Changes That I Created	Yes	All Released changes (**Date Released** field not blank) of which I am the originator
Canceled Changes That I Created	Yes	All changes in Cancel type status of which I am the originator
Change Analyst Searches folder		
Unassigned Submitted Changes	Yes	All changes whose **Change Analyst** or **Component Engineer** field is blank
Submitted More Than 7 Days Ago	Yes	Changes submitted more than 7 days before today
Submitted More Than 14 Days Ago	Yes	Changes submitted more than 14 days before today
Submitted More Than 21 Days Ago	Yes	Changes submitted more than 21 days before today
Deleted Changes	No	All soft-deleted changes (see "Deleting Changes" on page 6-51)
Deleted Items	No	All soft-deleted items (see "Deleting Items" on page 3-19)
Items That Have Files Checked Out	Yes	All items that have files checked out on the **Attachments** tab

Table 16-1: Predefined system searches

Predefined search	Edit/ view	Which objects are found
Released Items With Redlined Attachments	No	All items that have been released with redlined attachments on the item **Attachments** tab
Incorporated Items with Redlined Attachments	No	All items that have been incorporated with redlined attachments on the item **Attachments** tab
Public Inbox folder		
Changes Submitted to Me	Yes	Submitted changes (Submitted type status) for which I am the change analyst or component engineer
Changes in Review for Which I Am The Analyst	Yes	Any changes in Review type status for which I am the change analyst or component engineer
Rejected Changes For Which I Am The Analyst	Yes	Changes in Review type status with at least one rejection for which I am the change analyst or component engineer
Releasable Changes For Which I Am The Analyst	Yes	Changes for which I am the analyst that have been approved, have no rejections, and are ready for release
Changes That Require My Approval	Yes	Unapproved changes in Review or Released status type where I am listed as an approver
Changes That I Am An Observer Of	Yes	Unapproved changes in Review or Released status type where I am listed as an observer
Changes That Were Returned To Me	Yes	Changes I submitted that were returned to originator (switched to Pending type status)
Pre-Upgrade Changes That Were Returned to Me (Optional search for upgrade systems only)	No	Changes I created before the upgrade that were returned to originator (switched to Pending type status) To find *all* Changes Returned to Me, run this search and the Changes That Were Returned To Me search.
Changes That Require My Action	Yes	Submitted changes for which I am the analyst, changes in Review type status for which I am the analyst that have been approved and are ready for release, and unapproved changes where I am listed as an approver
All Changes Escalated to Me	No	Changes escalated to me; that is, changes where a user (for which I am the designated escalation person) has not signed off and the escalation period has elapsed

Table 16-1: Predefined system searches

Predefined search	Edit/ view	Which objects are found
All Changes Transferred to Me	No	Changes where a user's signoff authority has been transferred to me for a specified period of time
Packages Submitted to Me	Yes	Submitted packages (Submitted type status) for which I am the program manager
Packages in Review for Which I Am The Analyst	Yes	Any packages in Review type status for which I am the program manager
Rejected Packages For Which I Am The Analyst	Yes	Packages in Review type status with at least one rejection for which I am the program manager
Acceptable Packages For Which I Am The Analyst	Yes	Packages for which I am the program manager that have been approved, have no rejections, and are to be accepted
Packages That Require My Approval	Yes	Unapproved packages in Review or Released status type where I am listed as an approver
Packages That I Am An Observer Of	Yes	Unapproved packages in Review or Released status type where I am listed as an observer
Packages That Were Returned To Me	Yes	Packages I submitted that were returned to originator (switched to Pending type status)
Packages That Require My Action	Yes	Submitted packages for which I am the program manager, packages in Review type status for which I am the program manager that have been approved and are ready for release, and unapproved packages where I am listed as an approver

The default predefined searches are presented here as a reference and as examples of the types of searches that can be created.

See Chapter 12, "Searching for Objects," for details on creating and saving searches.

Global Searches Folder

In addition to containing the Workflow Search Samples folder, the Global Searches folder contains these searches:

- All Deviations About to Expire (not editable)
- All Released Stop Ships
- Unreleased Changes That I Created

- Released Changes That I Created
- Canceled Changes That I Created

All Deviations About to Expire (not editable)

This non-editable search finds all changes of the class Deviation that have an expiration date within one week (168 hours) of today.

All Released Stop Ships

Finds all changes of the class Stop Ship that have been released or moved to Complete type status.

	Cover Page.Date Release is Not Null			

Unreleased Changes That I Created

Find changes that I have created and that have not yet been released.

	Cover Page.Originator Equal To $USER		And	
	Cover Page.Date REleased Is Null		And	
	Cover Page.Status Not Equal To Status Type.Cancel			

Released Changes That I Created

Find changes that I have created and that have been released.

	Cover Page.Originator Equal To $USER		And	
	Cover Page.Date Released Is Not Null			

Canceled Changes That I Created

Find changes that I have created and that have been canceled.

	Cover Page.Status Equal To Status Type.Cancel		And	
	Cover Page.Originator Equal To $USER			

Change Analyst Searches

The following default system searches are available to you if your user profile allows you to use change analyst searches. See your Agile administrator if you have questions.

- Unassigned Submitted Changes
- Submitted More Than 7 Days Ago (not editable in the Web client)
- Submitted More Than 14 Days Ago (not editable in the Web client)
- Submitted More Than 21 Days Ago (not editable in the Web client)
- Deleted Changes (not editable)
- Deleted Items (not editable)
- Items That Have Files Checked Out
- Released Items With Redlined Attachments (not editable)
- Incorporated Items With Redlined Attachments (not editable)

Unassigned Submitted Changes

Find changes in a Submit type status that do not have a change analyst assigned to them.

	Cover Page.Status Equal To Status Type.Submit		And	
	Cover Page.Change Analyst Is Null			

Submitted More Than 7 Days Ago

Find changes in a Submit type status that were submitted more than 7 days (168 hours) ago.

	Cover Page.Status Equal To Status Type.Submit		And	
	Workflow.Duration Greater Than or Equal To 168.0			

Submitted More Than 14 Days Ago

Find changes in a Submit type status that were submitted more than 14 days (336 hours) ago.

[	Cover Page.Status Equal To Status Type.Submit		And	
	Workflow.Duration Greater Than or Equal To 336.0	]		

Submitted More Than 21 Days Ago

Find changes in a Submit type status that were submitted more than 21 days (504 hours) ago.

[	Cover Page.Status Equal To Status Type.Submit		And	
	Workflow.Duration Greater Than or Equal To 504.0	]		

Deleted Changes (not editable)

This non-editable search finds all soft-deleted changes. See "Deleting Changes" on page 6-51 for details.

Deleted Items (not editable)

This non-editable search finds all soft-deleted items. See "Deleting Items" on page 3-19 for details.

Items That Have Files Checked Out

Find items that have file attachments checked out on their **Attachments** tabs.

	Attachments.Checkout User is Not Null			

Released Items With Redlined Attachments (not editable)

Note This search is available only at sites using the Agile Viewer.

This search finds released items with attachment redlines where the attachment redlines were created through the change order that released that revision of the item. This search does not return item revisions (with attachment redlines) that are pending (the change order has not been released, therefore the pending revision has not been released).

By running this search, the change analyst can find released items where redlines have not yet been integrated into the attached drawings.

Incorporated Items With Redlined Attachments (not editable)

Note This search is available only at sites using the Agile Viewer.

This search finds items with attachment redlines where the item has been incorporated. That is, the **Incorporate** button on the **Attachments** tab has been used to lock the item so that attachments cannot be added or deleted. See "Incorporating and Unincorporating Items" on page 3-23.

By running this search, the change analyst can find incorporated items where redlines have not yet been integrated into the attached drawings.

Component Engineer Searches

The following searches are available to you if your Agile administrator has given you the appropriate rights in your user profile. None of these searches can be viewed or edited.

- Mfr Pts Not Used for a Latest Released Part (not editable)
- Manufacturers Not Used for a Latest Released Part (not editable)
- Manufacturer Parts With Multiple Parents (not editable)
- Deleted Manufacturer Parts (not editable)
- Deleted Manufacturers (not editable)

Mfr Pts Not Used for a Latest Released Part (not editable)

This noneditable search returns all manufacturer parts that are not used in a latest released part. For example, if a manufacturer part is used in a previous released revision of a part, (but not the latest released revision) it appears in this search.

See also "Searching on Rev-Specific Values" on page 12-2.

Manufacturers Not Used for a Latest Released Part (not editable)

This noneditable search returns a list of manufacturers whose parts are not used in a latest released part. This is similar to the search above, but applies to manufacturers instead of manufacturer parts.

See also "Searching on Rev-Specific Values" on page 12-2.

Manufacturer Parts With Multiple Parents (not editable)

This noneditable search returns manufacturer parts that are used on more than one item's **Manufacturers** tab.

Each manufacturer part returned by this search has more than one item on its **Where Used** tab.

Deleted Manufacturer Parts (not editable)

This non-editable search returns all soft-deleted manufacturer parts. See "Deleting Manufacturing Objects" on page 4-12 for details.

Deleted Manufacturers (not editable)

This non-editable search returns all soft-deleted manufacturers. See "Deleting Manufacturing Objects" on page 4-12 for details.

Quality Analyst Searches

If your company has a license to use quality tracking features, you may see a Quality Analyst Searches folder. Whether you can access the predefined quality analyst searches is determined by your user profile settings. See your Agile administrator if you have questions about your user profile settings.

Deleted PRs (not editable)

This non-editable search finds all soft-deleted objects in the class Problem Reports.

Deleted Issues (not editable)

This non-editable search finds all soft-deleted objects in the class Issue.

All Unassigned PRs

This search finds all objects in the class Problem Reports that have not yet been assigned to a quality analyst. The problems reports are in the Unassigned status or Pending type status, and the **Quality Analyst** field is blank.

(	Cover Page.Status Equal To Status Type.Pending		Or	
	Cover Page.Status Equal To Unassigned	)	And	
	Cover Page.Quality Analyst is Null			

All Unassigned Issues

This search finds all objects in the class Issues that have not yet been assigned to a quality analyst. The issues are in the Unassigned status or Pending type status, and the **Quality Analyst** field is blank.

(	Cover Page.Status Equal To Status Type.Pending		Or	
	Cover Page.Status Equal To Unassigned	)	And	
	Cover Page.Quality Analyst is Null			

Open Problem Reports

This search finds all objects in the class Problem Reports that are in a Submit or Review type status. Note that this search does not find problem reports in Pending type or Released type statuses.

Note The **QCR Number** column in the Open Problem Reports search results table shows you whether the PSR is listed on a CAR. A PSR can be listed on only one CAR.

	Cover Page.Status Equal to Status Type.Review		Or	
	Cover Page.Status Equal to Status Type.Submit			

Open Issues

This search finds all objects in the class Issues that are in a Submit or Review type statuses. Note that this search does not find issues in the Pending type or Released type statuses.

	Cover Page.Status Equal to Status Type.Review		Or	
	Cover Page.Status Equal to Status Type.Submit			

Quality Administrator Searches

If your company has a license to use quality tracking features, you may see a Quality Administrator Searches folder. Whether you can access the predefined quality administrator searches is determined by your user profile settings. See your Agile administrator if you have questions about your user profile settings.

Deleted CARs (not editable)

This non-editable search finds all soft-deleted objects in the class Quality Change Requests.

All Open CARs

This search finds all objects in the class Quality Change Requests that are in the Submit type or Review type statuses. Note that this search does not find CARs in Pending type or Released type statuses.

	Cover Page.Status Equal to Status Type.Review		Or	
	Cover Page.Status Equal to Status Type.Submit			

All Closed CARs

This search finds all objects in the class Quality Change Requests that are in the Complete type status.

	Cover Page.Status Equal to Status Type.Complete			

All Released CARs

This search finds all objects in the class Quality Change Requests that are in the Released type status.

	Cover Page.Status Equal to Status Type.Released			

Deleted Customers (not editable)

This non-editable search finds all soft-deleted objects in the class Customers.

Workflow Search Samples

The following default predefined searches are included in Agile Advantage as workflow sample searches. These searches cannot be edited in the Agile Advantage Web client. To edit them use the Agile Advantage Windows client.

- Releasable Changes that have been approved
- Changes that have been approved by all approvers
- Changes that have not been approved by all approvers
- Changes that have not been approved by all Observers
- Changes that have not been signed off by either approvers or observers
- Changes that not all approvers have acted on
- Changes that no approver has signed off
- Changes that one or more approvers have signed off
- Changes that have been released since <date> and that I approved
- Changes that I am an approver of
- Changes that I have signed off as an approver
- Changes that I am an approver of and all approvers have approved
- Changes that I have been notified of
- Changes that I am not an Observer of
- Changes that have one or more approvers
- Changes that have no approver
- Unreleased Changes that all approvers have approved
- Changes that no approver has rejected
- Changes that some Observers have not signed off
- Changes that have not been signed off for more than 14 days

Releasable Changes that have been approved

Find the changes that have been approved by all the approvers and that are ready to be switched to a Released type status.

[	Workflow.Approver Action Equal To Approved		And	
	Signoff.Next Status Equal To Status Type.Released		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS	]		

Changes that have been approved by all approvers

Find the changes that have been approved by all the approvers at the current status. All the approvers have signed off, and no approver rejected the change.

[	Workflow.Approver Action Equal To Approved		And	
	Signoff.Workflow Status Equal to $CURRENTSTATUS	]		

Changes that have not been approved by all approvers

Find all the changes that haven't been approved by all the approvers. One or more approver may have rejected the change.

[	Workflow.Approver Action Not Equal To Approved		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS	]		

Changes that have not been approved by all Observers

Find changes that have not been approved by all observers.

[	Workflow.Observer Action Not Equal To Approved		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS	]		

Changes that have not been signed off by either approvers or observers

Find the changes where one or more approvers or observers have not signed off.

[	Workflow.Approver Action Contains Awaiting Approval		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS	]	And	
[	Workflow.Observer Action Contains Awaiting Approval		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS	]		

Changes that not all approvers have acted on

Find the changes where one or more approvers have signed off at the current status. The current status may be a Review type status or a Released type status.

[	Workflow.Approver Action Contains Awaiting Approval		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS	]		

Changes that no approver has signed off

Find the changes that no approvers have signed off. The change has not been rejected nor has it been approved by any approver.

[	Workflow.Approver Action Equal To Awaiting Approval		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS	]		

Changes that one or more approvers have signed off

Find the changes that one or more approvers have signed off.

[	Workflow.Approver Action Not Equal To Awaiting Approval		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS	]		

Changes that have been released since <date> and that I approved

Find the changes that have been released since <specified date> and that the current user (me) has approved.

	Cover Page.Date Released Greater Than 03-Jun-2000 20:05:00		And	
[	Workflow.Approver Contains $USER		And	
	Workflow.Approver Action Equal To Approved	]		

Changes that I am an approver of

Find the changes that have the current user (me) as an approver.

[	Workflow.Approver Contains $USER		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS	]		

Changes that I have signed off as an approver

Find the changes that have the current user (me) an approver and I have signed off as an approver. Note that grouping is used.

[	Workflow.Approver Contains $USER		And	
	Workflow.Approver Action Equal To Approved	]		

Changes that I am an approver of and all approvers have approved

Find the changes that have the current user (me) as an approver and that all approvers have approved. Note that grouping is not used.

[	Workflow.Approver Contains $USER		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS	]	And	
[	Workflow.Approver Action Equal To Approved.		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS	]		

Changes that I have been notified of

Find the changes that have the current user (me) on the list of users to notify.

[	Workflow.Notify Users Contains $USER		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS	]		

Changes that I am not an Observer of

Find the changes that do not have the current user (me) as an observer.

[	Workflow.Observer Does Not Contain $USER		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS	]		

Changes that have one or more approvers

Find the changes that have one or more approvers.

[	Workflow.Approver is Not Null		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS	]		

Changes that have no approver

Find the changes that have no approvers.

[	Workflow.Approver Is Null		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS	]		

Unreleased Changes that all approvers have approved

Find the unreleased change that all approvers have approved.

	Cover Page.Date Released Is Null		And	
	Workflow.Approver Action Equal To Approved		And	
	Cover Page.Status Not Equal To Status Type.Cancel			

Changes that no approver has rejected

Find the changes that no approver has rejected.

[	Workflow.Approver Action Does Not Contain Rejected		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS	]		

Changes that some Observers have not signed off

Find the changes that some observers have not signed off.

[	Workflow.Observer Action Contains Awaiting Approval		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS	]		

Changes that have not been signed off for more than 14 days

Find the changes that some approvers have not signed off and that have been in the Review type status for more than 14 days (336 hours).

[	Workflow.Approver Action Contains Awaiting Approval		And	
	Singoff.Workflow Status Equal To $CURRENTSTATUS	]	And	
[	Cover Page.Status Equal To Status Type.Review		And	
	Workfow.Duration Greater Than 336.0	}	Or	
[	Workflow.Approver Action Contains Awaiting Approval		And	

	Singoff.Workflow Status Equal To $CURRENTSTATUS	]	And	
[	Cover Page.Status Equal To Status Type.Released		And	
	Workfow.Duration Greater Than 336.0	}		

Public In-box Searches

The following default predefined searches appear in the Public In-box of all Agile Advantage users.

- Changes Submitted To Me
- Changes In Review For Which I Am The Analyst
- Rejected Changes For Which I Am The Analyst
- Releasable Changes For Which I Am The Analyst
- Changes That Require My Approval
- Changes That I Am An Observer Of
- Changes That Were Returned To Me
- Pre-Upgrade Changes That Were Returned To Me (not editable)
- Changes That Require My Action
- All Changes Transferred to Me (not editable)
- All Changes Escalated to Me (not editable)
- Packages Submitted To Me
- Packages In Review For Which I Am The Program Manager
- Rejected Packages For Which I Am The Program Manager
- Acceptable Packages for Which I Am the Program Manager
- Packages That Require My Approval
- Packages That I Am An Observer Of
- Packages That Were Returned To Me
- Packages That Require My Action

The following default predefined searches appear in the Public In-box at companies licensed to use quality tracking features:

- PRs Assigned to Me

- Issues Assigned to Me
- Product Service Requests That Require My Action
- CARs Assigned to Me

Changes Submitted To Me

Find the changes that have been submitted to me (current user). Note that search condition grouping is not used.

(	Cover Page.Status Equal To Status Type.Submit		And	
	Cover Page.Change Analyst Equal To $USER	)		

Changes In Review For Which I Am The Analyst

Find the changes that are in a Review type status and that I (current user) am the change analyst.

	Cover Page.Status Equal To Status Type.Review		And	
	Cover Page.Change Analyst Equal To $USER			

Rejected Changes For Which I Am The Analyst

Find changes where I am the change analyst and one or more approvers have rejected the change.

Note This search is not editable in the Agile Advantage Web client.

(	Cover Page.Change Analyst Equal To $USER		And	
[	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Approver Action Contains Rejected	]	And	
(	CoverPage.Status Equal To Status Type.Review		Or	
	CoverPage.Status Equal To Status Type.Released	)		

Releasable Changes For Which I Am The Analyst

Find changes where I am the change analyst and the changes are ready for release.

Note This search is not editable in the Agile Advantage Web client.

([	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Approver Action Does Not Contain Awaiting Approval	]	Or	
[	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Approver is Null	])	And	
[	Signoff.Worflow Status Equal To $CURRENTSTATUS		And	
	Signoff.Next Status Equal To Status Type.Released	]	And	
	Cover Page.Change Analyst Equal To $USER			

Changes That Require My Approval

Find changes where I am an approver and I have not yet signed off.

Note This search is not editable in the Agile Advantage Web client.

[	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Approver Contains $USER		And	
	Workflow.Approver Action Equal to Awaiting Approval	]		

Changes That I Am An Observer Of

Find changes where I am an observer and I have not yet signed off.

Note This search is not editable in the Agile Advantage Web client.

[	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Observer Contains $USER		And	
	Workflow.Observer Action Equal to Awaiting Approval	]		

Changes That Were Returned To Me

Find changes that have been returned to me.

Note This search is not editable in the Agile Advantage Web client.

	Cover Page.Status Equal To Status Type.Pending		And	
	Cover Page.Originatior Equal To $USER		And	
[	Signoff.Next Status Equal To Status Type.Pending		And	

	Signoff.Status Change By Is Not Null	]		

Pre-Upgrade Changes That Were Returned To Me (not editable)

Optional search for upgrade systems only. This search may not appear in your Public Inbox folder. This search appears only if your Agile system was upgraded from Agile Anywhere Release 6.x.

Finds changes the current user (me) created before the upgrade to Agile Anywhere Release 7 and that were returned to me, the originator (switched to Pending type status).

In order to find all Changes Returned To Me, run this search and the Changes That Were Returned To Me search.

Changes That Require My Action

Note This search is not editable in the Agile Advantage Web client.

Find the changes that require my action. This is a combination of searches:

- I am the change analyst and one or more of the following is true:
  - The change was submitted to me.
  - The change is in status type Review.
  - The change is in status type Review, and one or more approvers have rejected the change.
  - The next status is status type Released, and all the approvers have signed off at the current status; the change is ready for release.
- Changes where I am an approver and I have not signed off.
- Changes where I am an observer and I have not signed off.
- Changes where I am the originator and the change has been returned to me.

The combination of searches used depends on your privileges and user profile. See your Agile administrator if you have questions.

(	CoverPage.Status Equal To Status Type.Submit		And	
	Cover Page.Change Analyst Equal To $USER	)	Or	
(	Cover Page.Status Equal To Status Type.Review		And	
	Cover Page.Change Analyst Equal To $USER	)	Or	
(	Cover Page.Change Analyst Equal To $USER		And	
[	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Approver Action Contains Rejected	]	And	
	CoverPage.Status Equal To Status Type.Review	)	Or	
([	Signoff.Next Status Equal To Status Type.Released		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Approver Action Does Not Contain Awaiting Approval	]	And	
	Cover Page.Change Analyst Equal To $USER	)	Or	
[	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Approver Contains $USER		And	
	Workflow.Approver Action Equal to Awaiting Approval	]	Or	
[	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Observer Contains $USER		And	
	Workflow.Observer Action Equal To Awaiting Approval	]	Or	
(	Cover Page.Status Equal To Status Type.Pending		And	
	Cover Page.Originatior Equal To $USER		And	
[	Signoff.Next Status Equal To Status Type.Pending		And	
	Signoff.Status Change By Is Not Null	])		

All Changes Transferred to Me (not editable)

This non-editable search returns all changes where signoff authority has been transferred to you for a specific period of time. See “Transferring Signoff Authority” on page 6-45. When the authority transfer expires, the changes defined by that authority transfer no longer appear in the results of this search.

All Changes Escalated to Me (not editable)

This non-editable search returns all changes where you are the designated escalation person for a user who did not sign off the change before the escalation period expired. See "Reminder Period and Review Escalation Period" on page 6-44 and "Designated Escalation Person" on page 6-44.

Packages Submitted To Me

Find the packages that have been submitted to me (current user). Note that search condition grouping is not used.

(	Cover Page.Status Equal To Status Type.Submit		And	
	Cover Page.Program Manager Equal To $USER	)		

Packages In Review For Which I Am The Program Manager

Find the packages that are in a Review type status and for which I (current user) am the program manager.

	Cover Page.Status Equal To Status Type.Review		And	
	Cover Page.Program Manager Equal To $USER			

Rejected Packages For Which I Am The Program Manager

Find packages where I am the program manager and one or more approvers have rejected the package.

Note This search is not editable in the Agile Advantage Web client.

(	Cover Page.Program Manager Equal To $USER		And	
[	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Approver Action Contains Rejected	]	And	
(	CoverPage.Status Equal To Status Type.Review		Or	
	CoverPage.Status Equal To Status Type.Released	)		

Acceptable Packages for Which I Am the Program Manager

Find packages where I am the program manager and the packages are ready for release.

Note This search is not editable in the Agile Advantage Web Client.

([	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Approver Action Does Not Contain Awaiting Approval	]	Or	
[	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Approver is Null	])	And	
[	Signoff.Worflow Status Equal To $CURRENTSTATUS		And	
	Signoff.Next Status Equal To Status Type.Released	]	And	
	Cover Page.Program Manager Equal To $USER			

Packages That Require My Approval

Find packages where I am an approver and I have not yet signed off.

Note This search is not editable in the Agile Advantage Web Client.

[	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Approver Contains $USER		And	
	Workflow.Approver Action Equal to Awaiting Approval	]		

Packages That I Am An Observer Of

Find packages where I am an observer and I have not yet signed off.

Note This search is not editable in the Agile Advantage Web Client.

[	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Observer Contains $USER		And	
	Workflow.Observer Action Equal to Awaiting Approval	]		

Packages That Were Returned To Me

Find packages that have been returned to me.

Note This search is not editable in the Agile Advantage Web Client.

	Cover Page.Status Equal To Status Type.Pending		And	
	Cover Page.Originatior Equal To $USER		And	

[	Signoff.Next Status Equal To Status Type.Pending		And	
	Signoff.Status Change By Is Not Null	]		

Packages That Require My Action

Note This search is not editable in the Agile Advantage Web Client.

Find the packages that require my action. This is a combination of searches:

- I am the program manager and one or more of the following is true:
  - The package was submitted to me.
  - The package is in status type Review.
  - The package is in status type Review, and one or more approvers have rejected the package.
  - The next status is status type Review, and all the approvers have signed off at the current status; the package is ready for release.
- Packages where I am an approver and I have not signed off.
- Packages where I am an observer and I have not signed off.
- Packages where I am the originator and the package has been returned to me.

The combination of searches used depends on your privileges and user profile. See your Agile administrator if you have questions.

(	CoverPage.Status Equal To Status Type.Submit		And	
	Cover Page.Program Manager Equal To $USER	)	Or	
(	Cover Page.Status Equal To Status Type.Review		And	
	Cover Page.Program Manager Equal To $USER	)	Or	
(	Cover Page.Program Manager Equal To $USER		And	
[	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Approver Action Contains Rejected	]	And	
	CoverPage.Status Equal To Status Type.Review	)	Or	
([	Signoff.Next Status Equal To Status Type.Released		And	
	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Approver Action Does Not Contain Awaiting Approval	]	And	

	Cover Page.Program Manager Equal To $USER	)	Or	
[	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Approver Contains $USER		And	
	Workflow.Approver Action Equal to Awaiting Approval	]	Or	
[	Signoff.Workflow Status Equal To $CURRENTSTATUS		And	
	Workflow.Observer Contains $USER		And	
	Workflow.Observer Action Equal To Awaiting Approval	]	Or	
(	Cover Page.Status Equal To Status Type.Pending		And	
	Cover Page.Originatior Equal To $USER		And	
[	Signoff.Next Status Equal To Status Type.Pending		And	
	Signoff.Status Package By Is Not Null	])		

PRs Assigned to Me

Find the problem reports objects that have been submitted to me (current user) and that need action.

	Cover Page.Quality Analyst Equal To $USER		And	
	Cover Page.Status Not Equal To Status Type.Complete			

Issues Assigned to Me

Find the issues objects that have been submitted to me (current user) and that need action.

	Cover Page.Quality Analyst Equal To $USER		And	
	Cover Page.Status Not Equal To Status Type.Complete			

Product Service Requests That Require My Action

Find the product service requests (issues and problem reports) that have been submitted to me (current user) and that need action.

	Cover Page.Quality Analyst Equal To $USER		And	
	Cover Page.Status Not Equal To Status Type.Complete			

CARs Assigned to Me

Find the quality change request (CAR) objects that have been submitted to me (current user) and that need action.

	Cover Page.Quality Administrator Equal To $USER		And	
	Cover Page.Status Not Equal To Status Type.Complete			

Finding Objects with or without Attachments

To find objects that have attached files, include the following search condition in your search:

	Attachments.File Name Is Not Null			

To find objects that *do not* have attached files, include the following search condition in your search:

	Attachments.File Name Is Null			



CHAPTER 17

Agile Product Compliance Tracking

This chapter describes the Agile Product Compliance Tracking (PCT) solution. The main sections include:

- *What is Product Compliance Tracking?*
- *The Compliance Tab*
- *The Audit Compliance in the Actions Menu*
- *The Agile PCT Process*
- *Manufacturer Part Compliance*
- *Part Compliance*
- *BOM Compliance*
- *Change Order Compliance*
- *Searching by Compliance Values*
- *Use Cases: Compliance Logic for AML and BOM*
- *Product Compliance Tracking Audit Reports*

What is Product Compliance Tracking?

The purpose of this document is to satisfy the needs of customers who have problems regarding product compliance, since it is necessary to document, validate, reply to surveys, and submit to audits for several different compliance requirements. The compliance arena extends to various official product governance requirements, such as RoHS (Restricted use of Hazardous Substances), and WEEE (Waste Electrical and Electronic Equipment):

- **RoHS** - The RoHS (Restricted use of Hazardous Substances) compliance requirement is focused around the restricted use of six substances: Lead, Mercury, Cadmium, Hexavalent Chromium, Polybrominated Biphenals (PBB) and Polybrominated Diphenal Ethers (PBDE).
- **WEEE** - The WEEE (Waste Electrical and Electronic Equipment) compliance requirements are mainly focused around the end of life of the product and its disposal, recycling or reuse. Specifically, WEEE puts a responsibility onto the producer of the product to meet specific requirements (by percentage weight).

The Agile Product Compliance Tracking (PCT) solution is not restricted to just the environmental compliance directives. It is a compliance solution that could apply to FDA, UL, EMI and CSA compliances; generally any compliance that requires a documented, controlled, and auditable software tracking system.

The PCT solution helps multinational companies include into their standards, their unique interpretation of future changes to requirements (e.g. RoHS, WEEE) and new compliances with new regulations. The PCT solution produces a potential competitive advantage by enabling companies to implement such new compliances into their supply chain ahead of the official governed compliance-required changes. The supply chain of these companies will therefore be compliant, and they will not face the problem of not being allowed to ship their products.

The PCT solution focuses on the small and medium enterprises, with their low-to-mid-level supply chain members. PCT helps companies collect compliance data on items, BOMs, and manufacturer parts. By auditing items before they are released, companies can be certain that they are compliant. Compliance values are automatically set on items when they are released via engineering or manufacturer change orders.

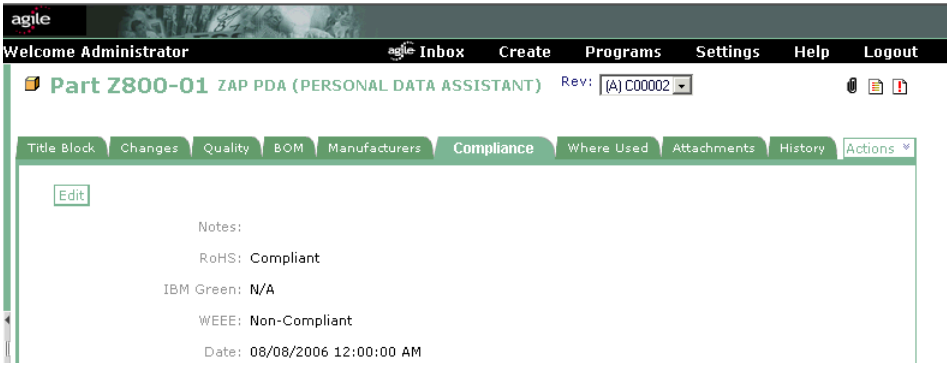
The Compliance Tab

The PCT solution enables a **Compliance** tab on Parts, Documentation, and Manufacturer Parts classes. The fields on the **Compliance** tab are defined in the Agile Administrator.

Note For more details on defining the **Compliance** tab, see the *Agile Administrator 2006 for Agile Advantage 2006 Web Client User Guide*

Figure 17-1 shows a sample part object with a **Compliance** tab that contains four fields: **RoHS**, **IBM-Green**, and **WEEE**, along with a **Notes** field.

Figure 17-1: The Compliance Tab of a Part Object



Compliance Attributes

The compliance attributes on the **Compliance** tab are list attributes. The Compliance Lists have the following properties and behavior: `Compliant`, `N/A`, `Non-Compliant`, `Unknown`.

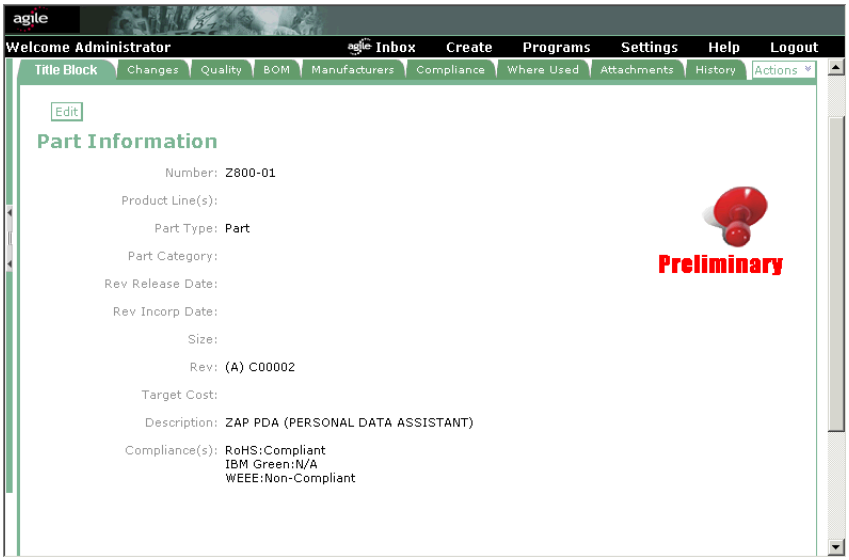
The below-mentioned list values will not be editable:

- **Compliant** - The business object is compliant
- **N/A** (Not Applicable)- The business object does not fall under the compliance criteria
- **Unknown** - The business object has not yet been evaluated for compliance
- **Non-Compliant** - The business object is not compliant to the specific directive

Note For more details on compliance attributes, see the *Agile Administrator 2006 for Agile Advantage User Guide*.

The compliance(s) attribute on the **Title Block** tab is a read-only field that lists the values from the **Compliance** tab.

Figure 17-2: The Read-Only Compliance Attribute on the Title Block Tab



The Audit Compliance in the Actions Menu

The **Audit Compliance** is active on all Item and Change Order objects and is used to audit these objects for compliance.

Open the Actions menu on the right side of the page and choose **Audit Compliance**:

- **On an active Item** - to check for compliance by looking at the item's AML, BOM, and all its child subassemblies, down to the bottom of its BOM structure.
- **On an active Change Order** (ECO or MCO) - to check for compliance by looking at all affected items, their AML, their BOMs, and all of their child subassemblies.

To audit the change for compliance:

Note The **Audit Compliance** is active on all Item and Change Order objects and is used to audit these objects for compliance.

1 Open the change you want to audit for compliance.

2 You can audit a change from any tab by choosing **Actions | Audit Compliance**. The **Audit Results for Compliance** page appears displaying four buttons and a tree view with nodes and subnodes. These nodes and subnodes represent Audit warnings or errors (*e.g.* "*No items have RoHS compliance violations*"), which constitute links to Items or Manufacturer Parts, and that you can correct and audit again.

3 Choose one of the four buttons described below:

- **Expand All -** This button displays all the subnodes.
- **Collapse All -** This button reduces all the subnodes.
- **Copy -** This button copies the audit statuses and pastes them into another file, such as Notepad, Microsoft® Word or Excel enabling you to use it as a work sheet.
- **Back -** By using this button, you can return to the change.

Figure 17-3 shows a sample output of an audit result for compliance.

Figure 17-3: The Audit Results for Compliance Page



The Agile PCT Process

In determining Item and Change Order compliance, the following general processes are adopted:

- **Manufacturer Part** - When the **Compliance** tab attribute values are set to `Non-Compliant` or `Unknown`, the Manufacturer Part is considered to be `Non-Compliant`.
- **Manufacturer Part** - When the **Compliance** tab attribute values are set to `Compliant` or `N/A`, the Manufacturer Part is considered to be `Compliant`.
- **Part** - When a Part has no AML on its **Manufacturers** tab, its **Compliance** tab attribute values determine whether it is considered to be `Compliant` or not.
- **Part** - When a Part has an AML on its **Manufacturers** tab, its **Compliance** tab values are calculated from the Manufacturer Part's compliance values.
- **BOM** - When Parts are added to a BOM, the BOM is considered to be compliant if all the child items are either set to `Compliant` or `N/A`.
- **Change Order** - On an Change Order, the affected items are checked for compliancy first at the part level, then at the AML level, and finally down to the Manufacturer Part level. If all affected items are calculated as either `Compliant` or `N/A`, then the change is considered to be `Compliant`.
- **Change Order** - When a compliant ECO or MCO is released, the affected items are automatically updated with the most current compliance settings.

Manufacturer Part Compliance

The **Compliance** tab attribute values determine whether the Manufacturer Part is compliant or not:

- When the **Compliance** tab attribute values are set to `Non-Compliant` or `Unknown`, the Manufacturer Part is calculated as `Non-Compliant`.
- When the **Compliance** tab attribute values are set to `Compliant` or `N/A`, the Manufacturer Part is calculated as `Compliant`.

In Table 17-1, the object with the following compliance attribute values is calculated as `Compliant`:

Table 17-1: Case 1

Attributes	Values
RoHS	Compliant
IBM-Green	N/A
WEEE	N/A

In Table 17-2, the object with the following compliance attribute values is calculated as `Non-Compliant` because one of the values is `Unknown`:

Table 17-2: Case 2

Attributes	Values
RoHS	Compliant
IBM-Green	Unknown
WEEE	N/A

Part Compliance

The **Compliance** tab attribute values or the AML compliance values determine whether the Part is compliant or not:

- When the Part has no AML on its **Manufacturers** tab, its **Compliance** tab attribute values determine whether it is `Compliant` or not.
- When the Part has an AML on its **Manufacturers** tab, its **Compliance** tab values are calculated from the compliance values of the Manufacturer Part.

  Note If one Manufacturer Part on the AML is considered `Non-Compliant`, then the Part is calculated as `Non-Compliant`.

BOM Compliance

In order for an assembly to be compliant, all child items must be compliant. The compliance information is displayed in the **BOM** tab with one column for each active Compliance List.

Caution! Product Compliance Tracking shall conform to all the Agile Roles & Privileges, as well as Discovery settings.

Note The **Audit Compliance** in the Action menu can be used on an open assembly to check each child item for compliancy.

Figure 17-4 and Figure 17-5 show an example of a **BOM** tab with three compliance columns (RoHS, IBM-Green and WEEE).

Figure 17-4: Assembly P00211 (Non-Compliant)

Item Number	Item Description	Find Num	RoHS	IBM Green	WEEE
P00006	BRACKET	1	N/A	N/A	N/A
P00007	BOLT	2	Unknown	Unknown	Unknown
P00008	NUT	3	Compliant	Compliant	N/A

Figure 17-5: Assembly P00211 (Compliant)

Item Number	Item Description	Find Num	RoHS	IBM Green	WEEE
P00006	BRACKET	1	N/A	N/A	N/A
P00007	BOLT	2	N/A	Compliant	Compliant
P00008	NUT	3	Compliant	Compliant	N/A

When assembly P00211 is released on an ECO or MCO, its compliance attributes are automatically calculated according to its children on the BOM (P00006, P00007 and P00008):

- In Figure 17-4, Assembly P00211 has one `Unknown` child (P00007). As a result, when released, Assembly P00211's compliance attributes are set to `Unknown` and the Assembly is considered `Non-Compliant`.
- In Figure 17-5, all of assembly P00211's children are `Compliant`. As a result, when released, Assembly P00211's compliance attributes are set to `Compliant`. When a compliant assembly is released, as a result to any modifications to a child that would make the assembly `Non-Compliant`, the compliance value of that child is displayed in red on the **BOM** tab. The assembly's compliance values will not be updated until it is re-released using a Change Order (ECO or MCO).

Change Order Compliance

When releasing an ECO or an MCO, compliance will be audited automatically. All affected items will be checked for compliancy. If there is one or more `Non-Compliant` item(s), then a warning message might appear.

Note See the *Agile Administrator 2006 for Agile Advantage User Guide* for setting the **ComplianceCheck** smartrule that defines the warning message's behavior.

When a compliant assembly is released, as a result to any modifications to a child that would make the assembly `Non-Compliant`, the compliance value of that child is displayed in red on the **BOM** tab. The assembly's compliance values will not be updated until it is re-released using a Change Order (ECO or MCO).

In Figure 17-6, Part P00007's IBM-Green attribute is set to `Non-Compliant`. The Assembly P00211's compliance values will not be updated (Assembly P00211's IBM-Green is still `Compliant`) because it is already released, but part P00007's IBM-Green attribute became red. To update Assembly P00211's compliance values, it has to be re-released using a Change Order (ECO or MCO).

Figure 17-6: Assembly P00211 Not Yet Updated with Latest Compliance Values

Item Number	Item Description	Find Num	RoHS	IBM Green	WEEE
P00006	BRACKET	1	N/A	N/A	N/A
P00007	BOLT	2	N/A	Non-Compliant	Compliant
P00008	NUT	3	Compliant	Compliant	N/A

Searching by Compliance Values

You can run an Advanced Search to find Items and Manufacturer Parts by specifying their compliance fields, values, and criteria.

Note The compliance fields and values are those enabled by Agile Administrator on the **Compliance** tab. For more details on defining the **Compliance** tab, see the *Agile Administrator 2006 for Agile Advantage 2006 Web Client User Guide*.

Use Cases: Compliance Logic for AML and BOM

The below-mentioned use-cases describe several compliance calculation scenarios.

Use-Case 1

Suppose a new item subclass Part is created with initial status of Preliminary. The default subclass part compliance value is set to `Unknown`. A component engineer adds on one Manufacturer Part Number (MPN) to its **Manufacturers** tab. The MPN has its compliance list RoHS set to `Compliant`. As a result, MPN is RoHS compliant and the item will be automatically calculated and set to `Compliant` for RoHS upon the first ECO/MCO release.

Use-Case 2

Suppose an item subclass Part is created with initial status of Preliminary. The component engineer adds three MPNs listed in its Manufacturer tab. Two MPNs have compliance list RoHS set to Compliant, and the third MPN is set to `Non-Compliant`. This means two MPNs are RoHS compliant and one isn't. Since one of the three MPNs is not compliant, the item is not compliant. The item will be automatically calculated and set to `Non-Compliant` for RoHS upon the first ECO/MCO release.

Use-Case 3

Suppose an item subclass Part is created with initial status of Preliminary. The configuration manager adds three released items to its BOM, but does not add any MPNs in the new item's **Manufacturers** tab. Two of the items are `Compliant` and one is `Non-Compliant`. Since there is one item on the item's **BOM** tab that is not compliant, the parent item is not compliant. This means the item is RoHS `Non-Compliant` and the item will be automatically calculated and set to `Non-Compliant` for RoHS upon the first ECO/MCO release.

Use-Case 4

Suppose the previous Use-Case 3, but this time all three items listed in the item's **BOM** tab are `Compliant`. In this case, the item is `Compliant` too. This means the item is RoHS compliant and the item will be automatically calculated and set to `Compliant` for RoHS upon the first ECO/MCO release.

Use-Case 5

Suppose an item has a BOM of three items each with a BOM underneath. For the top parent item to show RoHS compliant, all the children items must have met their compliance logic upon ECO/MCO release for the parent item to be compliant. This means for each change order that is released, compliance is checked downward for the item being released.

Use-Case 6

Suppose an item does not have a BOM or an MPN listed in its **Manufacturers** tab and the item is not structured to a released item. You shall be able to manually set the compliance lists.

Use-Case 7

Suppose an item subclass Documents has its AML compliance disabled. The configuration manager creates a document and adds three Item subclass parts to the **BOM** tab of the document. Upon first ECO/MCO release, the document compliance value will be calculated to show the correct compliance based on the children part's compliance.

Product Compliance Tracking Audit Reports

You can use the **Export** utility to export an Item's BOM and AML, along with corresponding compliance attribute values.

Note For further information on how to use the export utility, see Chapter 14 entitled "Data Access, Extraction & Reporting".



APPENDIX A
Tips, Hints, Troubleshooting

Here you can find some tips and hints to make your work easier, and some troubleshooting pointers. Some of the topics covered are:

- *Enabling the Attachments Tab Buttons*
- *How to Preserve Hard Disk Space*
- *Troubleshooting*
- *Agile Advantage Web Keyboard Shortcuts*
- *Moving Through Drop-down Lists*
- *Attachments Tab Buttons*
- *Problems Viewing Attachments*
- *Workflow Features and Licenses*
- *Date and Time Stamp Formats*

Enabling the Attachments Tab Buttons

If the Attachment buttons are disabled, check to see:

1. Is the item released or incorporated?

   Then no edits are permitted to that item until you use a change to make them.

2. Are you viewing an MCO Rev?

   Select a Rev with no MCO number next to it.

3. Have you been granted sufficient privileges?

Check with your Agile administrator.

How to Preserve Hard Disk Space

When you view an attached file in its native application, Agile places a copy of the file on your local hard disk drive and does not delete that copy when you close the file.

When you exit Agile, these files are deleted if they have been there longer than specified by your Agile administrator. For example, if the local copies of attached files on your hard disk have been there longer than 14 days, Agile deletes them when you exit the application.

You can periodically delete these files yourself to avoid using up space on the drive. The default location for these files is *drive*:\Agile Advantage 2006\TEMP\FILES.

Troubleshooting

Depending on roles and privileges assigned in Agile Administrator and property settings applied there, Agile might not work the way you expect. You'll find it helpful to check the list of frequently asked questions (FAQ) compiled by Agile's technical support group.

The FAQ list is available in the Support area of Agile's Web site,
`http://sme.agile.com/Support/Login.asp`

For information about viewing the FAQ list, see your Agile administrator.

Large Fonts versus Small Fonts

Agile requires that your computer be set to use small fonts. If your computer is set to use large fonts, the graphical display will not be correct. For example, the redline indicator will not be displayed correctly.

Agile Advantage Web Keyboard Shortcuts

The Agile Advantage Web client gives you several keyboard shortcuts.

Ctrl Key Shortcuts

The table below shows which shortcuts use the **Ctrl** key.

Table A-1: Keyboard Shortcuts

Ctrl+C	Copies the selection
Ctrl+V	Pastes the contents of the Clipboard
Ctrl+O	Opens a window where you type the Internet address of a document or folder for Internet Explorer to open
Ctrl+P	Opens the Print dialog box
Ctrl+N	Opens a new window

F Key Shortcuts

The table below shows which shortcuts use the **F**(unction) keys.

Table A-2: Function Key Shortcuts

Shift + F10	Displays the shortcut menu for the active window

Moving Through Drop-down Lists

When you have selected a field that is a drop-down list, use the arrow keys to move through the contents of the list. The ← and ↑ arrows move you up the list, the → and ↓ arrows move you down the list.

Attachments Tab Buttons

Buttons on the **Attachments** tab cannot be accessed directly with the keyboard; you must use the shortcut menu. With the cursor on the **Attachments** tab, use Shift+F10 to display the shortcut menu. Then, choose the desired command from the menu.

Problems Viewing Attachments

In order to use Agile View & Markup, you must be running Windows 2000 Professional Service Pack 4, Windows 2003 Standard Edition, or Windows XP Professional Service Pack 1.

Note For information about international operating systems and supported browsers, contact the Agile Software support Web site; see "Agile Online Support" on page iv.

Workflow Features and Licenses

Some features associated with Agile workflows are altered or not available depending on Server licenses at your site. The following tables provide details about which features may not be available to you.

The following basic functions are available without optional licenses at the site:

- Users can manually switch changes from one status to another status; AutoPromote is not available.
- Users can audit all statuses.
- The Agile administrator can specify required fields and manual valid next status for each status in the default workflows.

Table A-3: Change Collaboration Server license restrictions

Agile Feature	Site does not have Change Collaboration Server license
Create and Configure custom workflows in Agile Administrator	Agile administrator cannot create new workflows; can change only the required fields and manual valid next status in the default workflows.
Escalations (workflow status property)	Escalation period under workflows, and Designated Escalation Person under User node properties not available in Agile Administrator.
Reminders (workflow status property)	Reminder property under workflows not available in Agile Administrator.
Transfer Authority	No transfer authority menu item available in Agile.
AutoPromotion	AutoPromotion property not available in Agile Administrator
Add default approvers/observers	Default approvers/observers property not available in Agile Administrator.
Add ad hoc approvers/observers	Workflow property set to **No** in Agile Administrator; cannot be modified.
If Rejected, set status to (workflow status property)	Property not available in Agile Administrator.
If Autopromotion fails, Notify (workflow status property)	Property not available in Agile Administrator.

Table A-3: Change Collaboration Server license restrictions (continued)

Agile Feature	Site does not have Change Collaboration Server license
If Rejected, Notify (workflow status property)	Property not available in Agile Administrator.
Notify Upon Entry (workflow Criteria Specific property)	Property not available in Agile Administrator.
Change Analyst Searches	This directory of searches is not visible or available.
Public Inbox Searches	This directory of searches is not visible or available.
Searches containing Signoff or workflow attributes	Not available.

Table A-4: Manufacturer Management module restrictions

Agile Feature	Site does not have Change Collaboration Server license but does have Manufacturer Management module
Create and Configure custom workflows in Agile Administrator	Agile administrator cannot create new workflows; can change only the required fields and manual valid next status in the default workflows.
Escalations (workflow status property)	Escalation Period under workflows, and Designated Escalation Person under User node properties not available in Agile Administrator.
Reminders (workflow status property)	Reminder Period under workflows not available in Agile Administrator.
Transfer Authority	No transfer authority menu item available in Agile.
AutoPromotion	AutoPromotion property not available in Agile Administrator.
Add default approvers/observers (workflow Criteria Specific property)	Default approvers/observers property not available in Agile Administrator.
Add ad hoc approvers/observers (workflow status property)	Property available for MCOs only; for other changes workflow property set to **No** in Agile Administrator; cannot be modified.

Table A-4: Manufacturer Management module restrictions

Agile Feature	Site does not have Change Collaboration Server license but does have Manufacturer Management module
If Rejected, set status to (workflow status property)	Property not available in Agile Administrator.
If Autopromotion fails, Notify (workflow status property)	Property not available in Agile Administrator.
If Rejected, Notify (workflow status property)	Property not available in Agile Administrator.
Notify Upon Entry (workflow Criteria Specific property)	Property not available in Agile Administrator.
Change Analyst Searches	Provides Component Engineer Searches instead.
Public Inbox Searches	This directory of searches is not visible or available.
Searches containing the Signoff or workflow attributes	Not available.

Date and Time Stamp Formats

The formats used to display the date and time stamps in Agile is determined by settings in the Regional Settings Properties in the Microsoft Windows Control Panel.

- The short date style controls the format of the date display.
- The time style controls the format of the time display.

Note For detailed information about using Agile with international operating systems, contact the Agile Software support Web site; see "Agile Online Support" on page iv.

Date Stamp Formats

We recommend using a 4-digit year date style in the Microsoft Windows Control Panel, Regional Settings.

You may enter four digits or two digits for the year. When you enter two digits for the year, those two digits are interpreted as follows:

- 00 through 29 are interpreted as 2000 through 2029.

- 30 through 99 are interpreted as 1930 through 1999.

Agile supports the display of years in the range of 1971 through 2038.

If you enter a year outside the supported range, you will get an error.

Note You may use the Calendar Widget to enter dates.

Time Stamp Formats

To display the time stamps in 24-hour (military) format, choose the appropriate time style setting on the Time tab in Regional Settings.

By default, the time stamp format is stored in the Agile database in the military time format, a 24-hour clock. However, the time style setting on the computer you are using determines which format is used to display the time in Agile.



APPENDIX B
A Tour Through Agile Advantage

This chapter uses a scenario to demonstrate how the various departments in a typical company use Agile Advantage to solve problems. The scenario shows how employees collaborate to resolve problem reports and release a new revision of a product.

This chapter includes these topics:

- *Understanding Problem Reports and the Change Process*
- *Managing Cost Information*
- *Releasing a Change*

Understanding Problem Reports and the Change Process

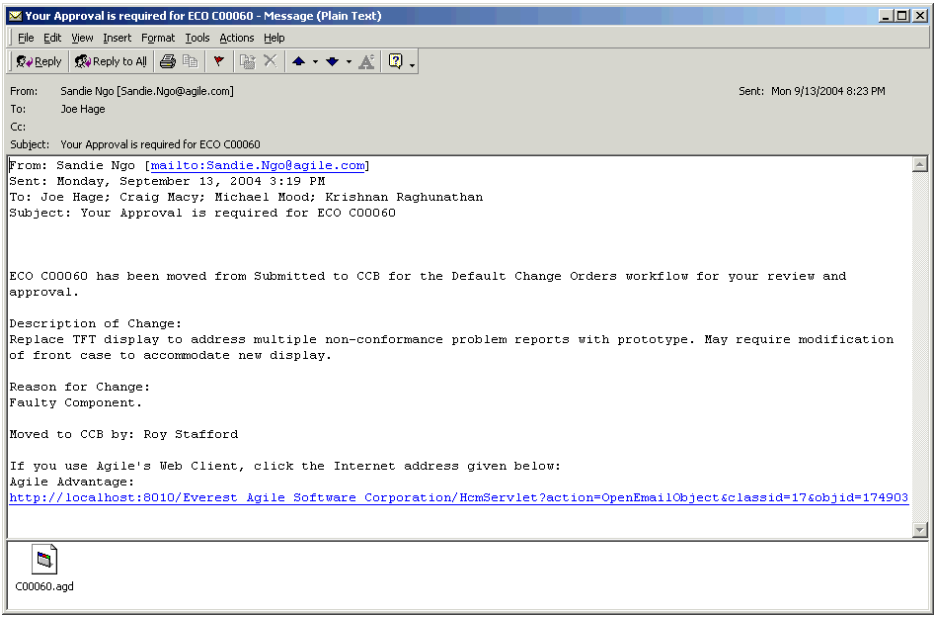
Scenario

The scenario begins when the Customer Support department identifies a recurring problem with a product, and electronically routes information through Agile. Engineering then proposes a change order to solve that problem, which is routed for approval, and the solution is agreed upon and put into practice.

The Change Request

Joe, a mechanical has received an email notification from Agile informing him that he needs to approve a new Engineering Change Order (ECO). The email is automatically generated by Agile Advantage and sent to the people who need to approve the ECO. It can contain links to both the Agile Advantage Windows Client and the Agile Advantage Web Client, if the Agile Administrator setting is configured in such a way. Clicking on the link brings up the Web Client and opens the ECO.

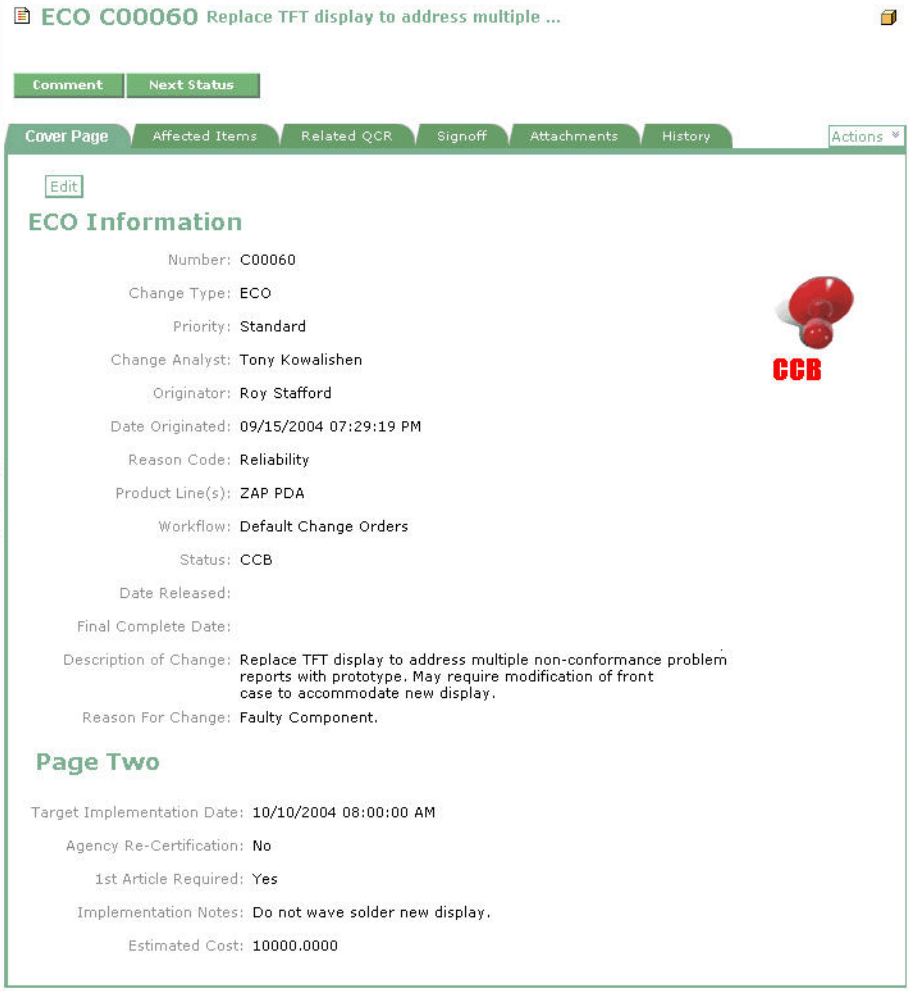
Figure B-1: The Notification



Joe's username and password provide him with access to the system. Each user has a specific set of roles and privileges within the system that control what they are permitted to see and do in Agile. For example, there are privileges to create, delete, modify, read, discover, etc. The discovery privilege allows objects in the system to be completely hidden from some users, for example you may want manufacturing partners to only see the product lines that they are manufacturing. The read and modify privileges operate at a field level, so, for example, you can configure the system to hide estimated cost fields from suppliers.

Clicking on the link in the email notification brings Joe directly to the ECO that requires Joe's approval. It clearly states the description of the change and other relevant information on the Cover Page. This change involves replacing the display of the PDA. We can see by the stamp on the upper right corner that it is in a CCB workflow state.

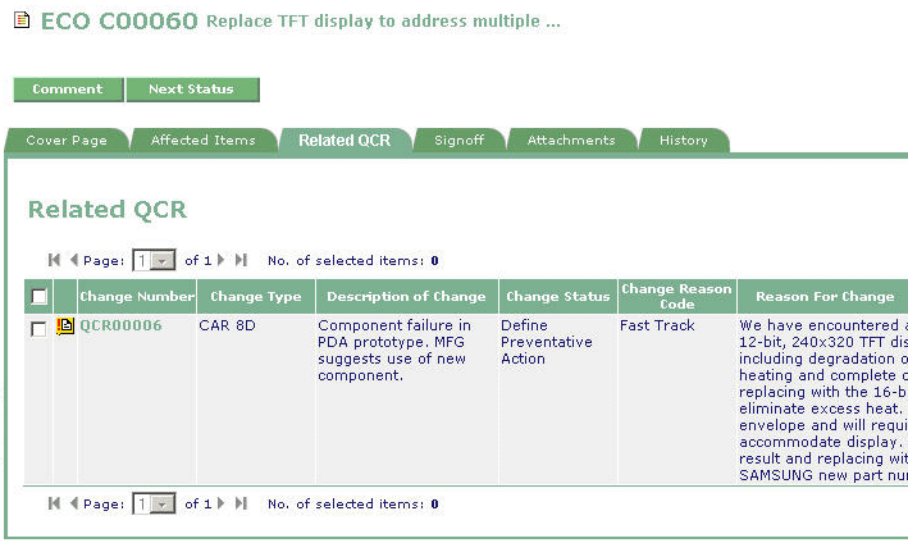
Figure B-2: The ECO Cover Page tab



Each Agile object has a number of tabs that describe the object. The Agile Administrator is able to configure the tabs and the fields that appear on the tabs. For example, each object can optionally have a **Page Two** and a **Page Three** sections in the Cover Page tab that contain fields that are specific to your business. The fields include currency, text, list, multilist and date fields. This demonstration has chosen several fields on **Page Two** section of the ECO. Note that this change has an estimated cost of $10,000. We'll show how Agile's field level read capability hides this from another user later in the scenario.

The Agile Quality Management product tracks problem service requests (PSR) and quality change requests (QCR). The PSRs, also known as problem reports, can be entered by anyone with access to the system including customers, partners or by your own employees. They typically describe a problem with the product. Quality change requests, also known as corrective actions, consolidate related problem reports and describe how the problems will be resolved. In this scenario, you can see the **Relates QCR** tab that references the quality change request that are addressed by this change.

Figure B-3: The ECO Related QCR Tab

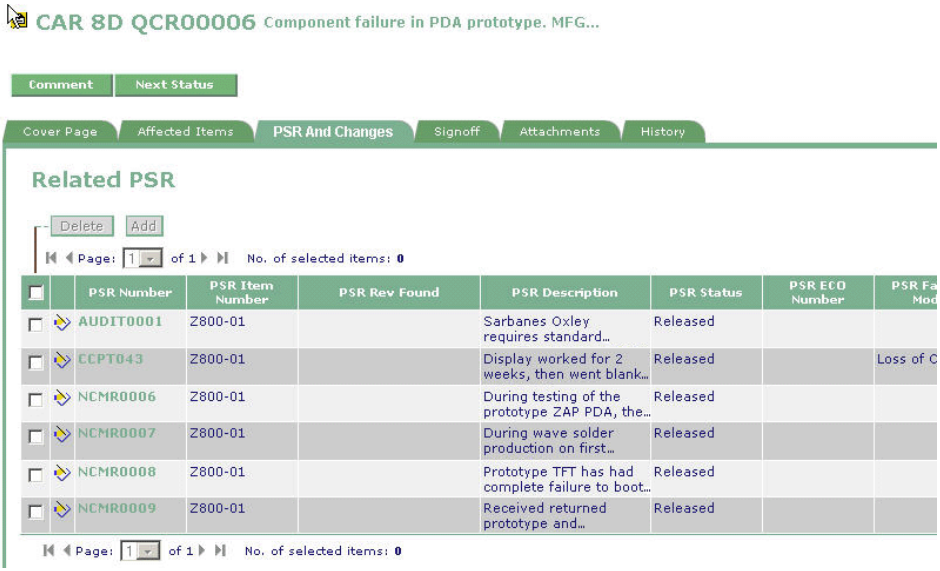


As you can see, there is a quality change request indicating a component failure. We can look at the quality change request more closely by clicking on its number.

We can see the quality change request has a similar tabbed dialog to the ECO. It contains the information regarding the quality change request and also has a configurable **Page Two** section. The Agile administrator has chosen to create a **Page Three** section for this object. Note that the QCR describes a problem with the PDA display.

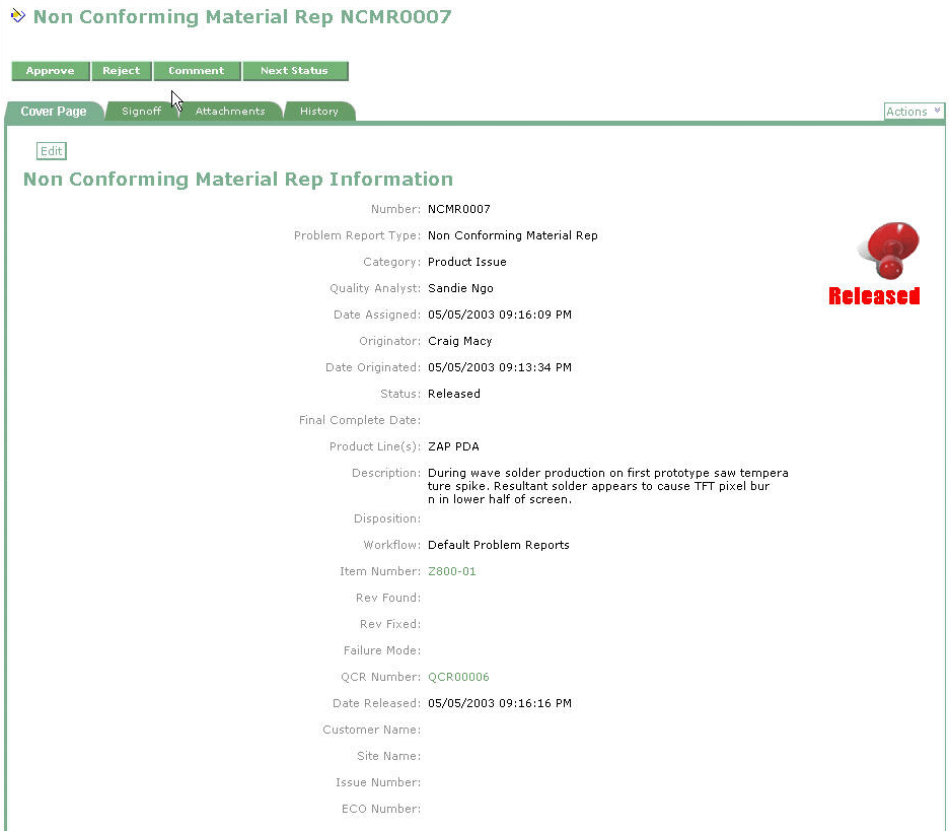
The quality change request references all the problem reports that are relevant to this QCR. This information is available on the **PSR And Changes** Tab.

Figure B-4: The QCR PSR and Changes Tab



You can see there are 6 problem reports that led to this quality change request. Note that there is an audit finding regarding Sarbanes-Oxley, a customer complaint discussing the display as well as several non-conforming material reports. You can also see a reference from the quality change request to the original ECO C00060 that we are approving. Clicking on the problem report number opens their tabbed dialog.

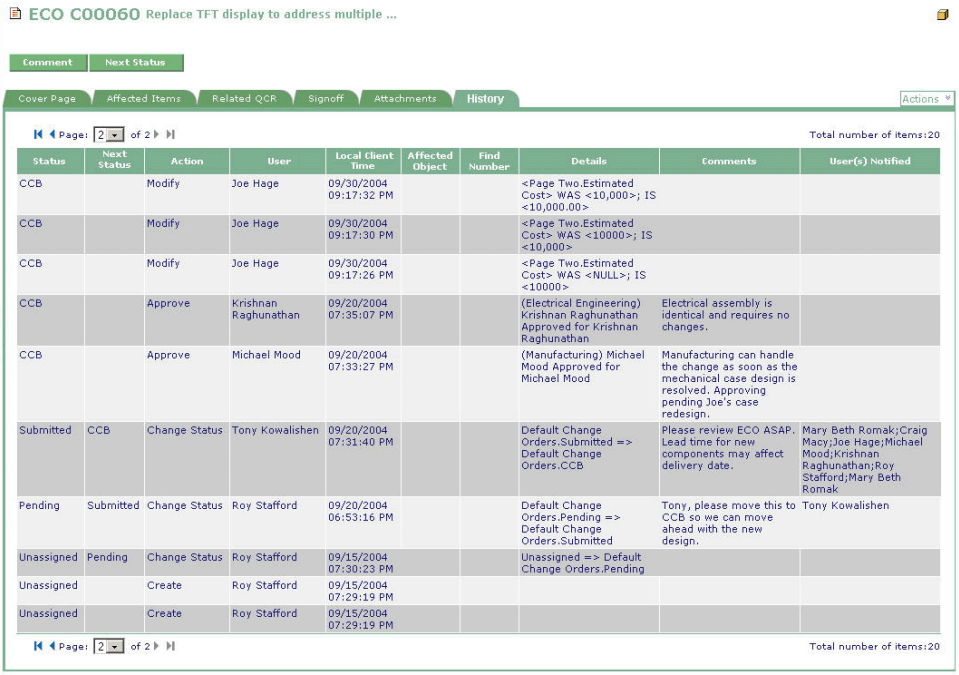
Figure B-5: The PSR Cover Page Tab



The problem report, like all Agile objects, has a tabbed dialog and can contain configurable **Page Two** and **Page Three** sections. Note that this problem report mentions problems wave soldering the display.

Lets go back to the ECO to continue the scenario. All objects have a history tab to track exactly what has happened with the object. This provides essential traceability and helps you comply with ISO and FDA requirements. Let's look at the history of the ECO.

Figure B-6: The ECO History Tab



ECO C00060 Replace TFT display to address multiple ...

Comment | Next Status

Cover Page | Affected Items | Related QCR | Signoff | Attachments | History | Actions

Page: 2 of 2 — Total number of items:20

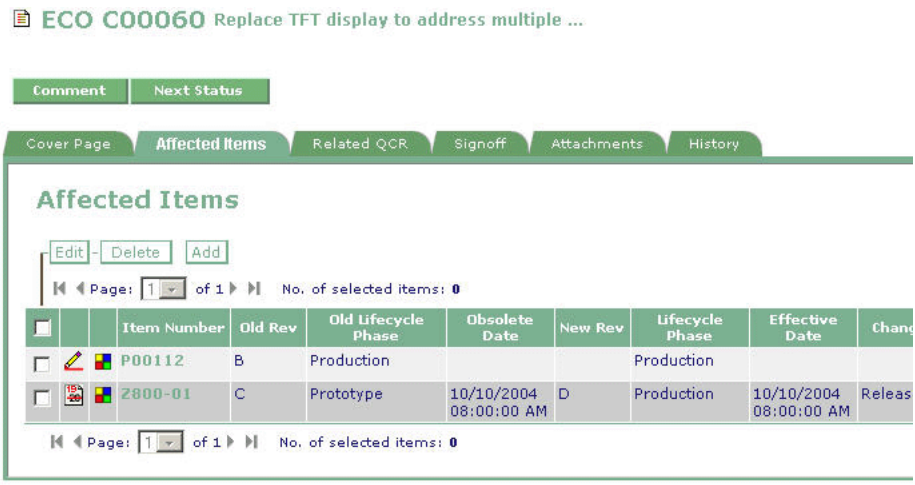
Status	Next Status	Action	User	Local Client Time	Affected Object	Find Number	Details	Comments	User(s) Notified
CCB		Modify	Joe Hage	09/30/2004 09:17:32 PM			<Page Two.Estimated Cost> WAS <10,000>; IS <10,000.00>		
CCB		Modify	Joe Hage	09/30/2004 09:17:30 PM			<Page Two.Estimated Cost> WAS <10000>; IS <10,000>		
CCB		Modify	Joe Hage	09/30/2004 09:17:26 PM			<Page Two.Estimated Cost> WAS <NULL>; IS <10000>		
CCB		Approve	Krishnan Raghunathan	09/20/2004 07:35:07 PM			(Electrical Engineering) Krishnan Raghunathan Approved for Krishnan Raghunathan	Electrical assembly is identical and requires no changes.	
CCB		Approve	Michael Mood	09/20/2004 07:33:27 PM			(Manufacturing) Michael Mood Approved for Michael Mood	Manufacturing can handle the change as soon as the mechanical case design is resolved. Approving pending Joe's case redesign.	
Submitted	CCB	Change Status	Tony Kowalishen	09/20/2004 07:31:40 PM			Default Change Orders.Submitted => Default Change Orders.CCB	Please review ECO ASAP. Lead time for new components may affect delivery date.	Mary Beth Romak;Craig Macy;Joe Hage;Michael Mood;Krishnan Raghunathan;Roy Stafford;Mary Beth Romak
Pending	Submitted	Change Status	Roy Stafford	09/20/2004 06:53:16 PM			Default Change Orders.Pending => Default Change Orders.Submitted	Tony, please move this to CCB so we can move ahead with the new design.	Tony Kowalishen
Unassigned	Pending	Change Status	Roy Stafford	09/15/2004 07:30:23 PM			Unassigned => Default Change Orders.Pending		
Unassigned		Create	Roy Stafford	09/15/2004 07:29:19 PM					
Unassigned		Create	Roy Stafford	09/15/2004 07:29:19 PM					

Page: 2 of 2 — Total number of items:20

You can see that Roy created the ECO on 9/16 and its status has been changed from **Pending** to **Submitted** to **CCB**. Remember we saw that the status was CCB on the **Cover Page**. Both Krishnan and Michael have approved the change.

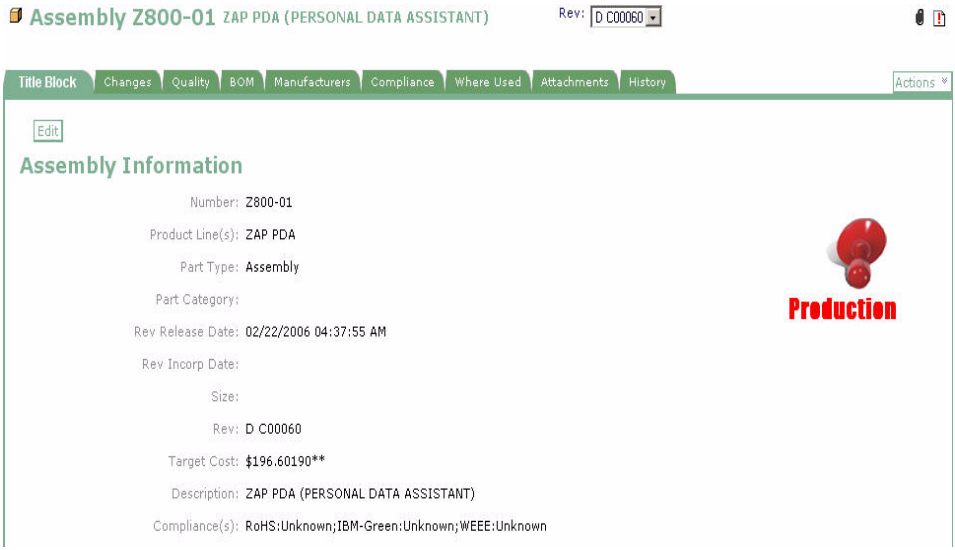
The ECO references the items (parts and documents) that will be changed as a result of the change order. These can be seen from the **Affected Items** tab.

Figure B-7: The ECO Affected Items Tab



As you can see part Z800-01 will be changing from Revision C, Prototype to Revision D, Production as a result of this ECO. Let's take a look at part Z800-01 by clicking on the Item Number to familiarize us with the assembly.

Figure B-8: The Part Title Block



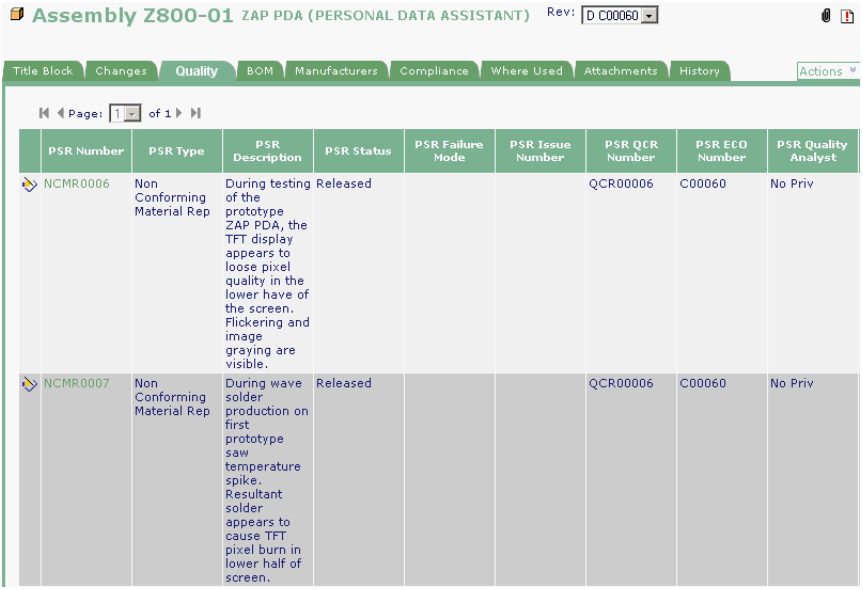
Items, like all Agile Advantage objects, have a tabbed dialog. We are familiar with the **Page Two** section. The **Changes** tab shows us the pending changes and the change history of the item.

Figure B-9: The Part Changes Tab



In the change history, you can see there are 3 changes that have already been released and one change that has been cancelled. The change we are reviewing (C00060) appears in the pending changes. Agile Advantage supports multiple pending changes simultaneously and can resolve any conflicting redlines automatically. The **Quality** tab shows the 6 PSRs we saw earlier identifying quality problems with the PDA.

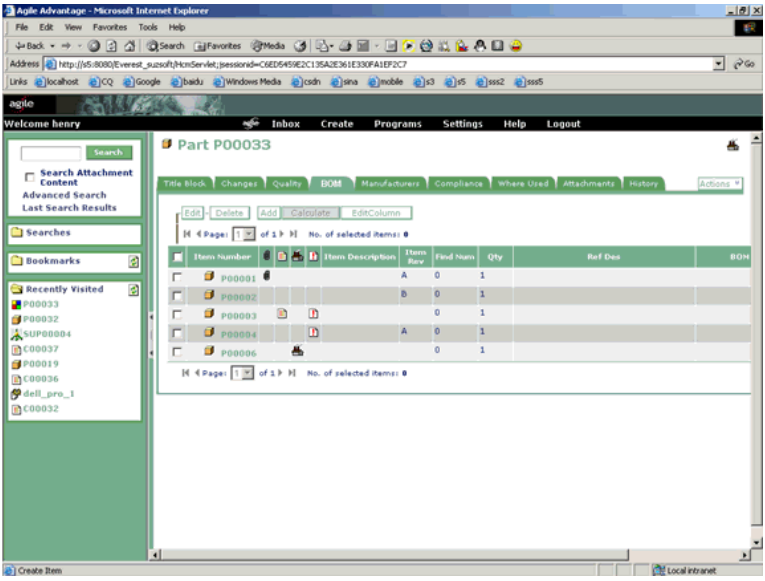
Figure B-10: The Part Quality Tab



	PSR Number	PSR Type	PSR Description	PSR Status	PSR Failure Mode	PSR Issue Number	PSR QCR Number	PSR ECO Number	PSR Quality Analyst
	NCMR0006	Non Conforming Material Rep	During testing of the prototype ZAP PDA, the TFT display appears to loose pixel quality in the lower have of the screen. Flickering and image graying are visible.	Released			QCR00006	C00060	No Priv
	NCMR0007	Non Conforming Material Rep	During wave solder production on first prototype saw temperature spike. Resultant solder appears to cause TFT pixel burn in lower half of screen.	Released			QCR00006	C00060	No Priv

Items can have a bill of materials (BOM).

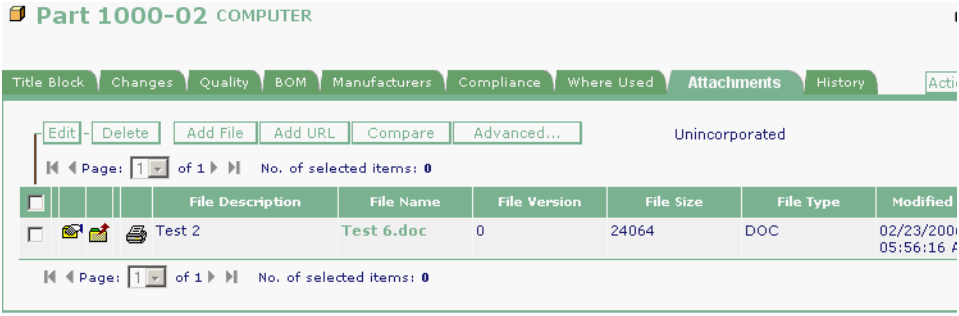
Figure B-11: The Part BOM Tab



The BOM can have multiple levels which are all visible from the **BOM** tab. The attachment icon indicates that the object has an attachment, or file, associated with it. The manufacturer icon indicates that someone else manufactures the part. The problem report icon indicates that there are problem reports associated with this part. You can see reference designators, find numbers and target cost appear here. The Agile administrator is able to add additional fields to this and most tables throughout the system. The **Where Used** shows the parent assemblies of the part.

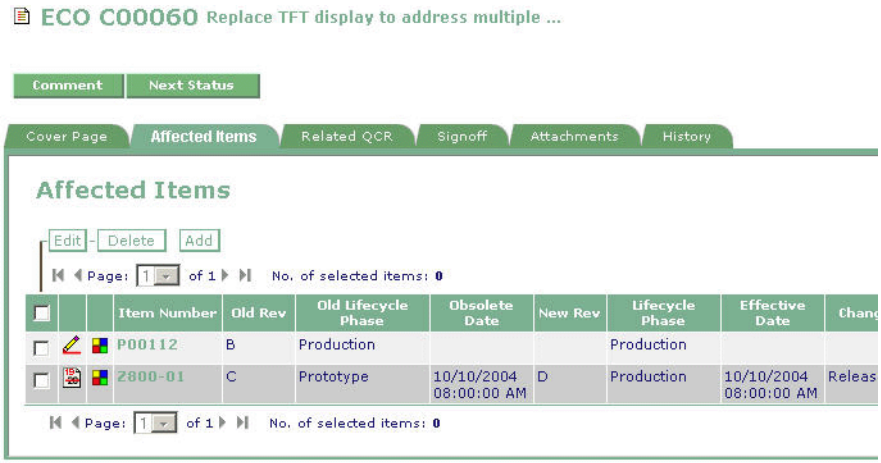
All objects can have attachments. Attachments are files or URLs that contain data about the object. Attachments can be opened in their native application or by using the Agile Viewer.

Figure B-12: The Part Attachments Tab



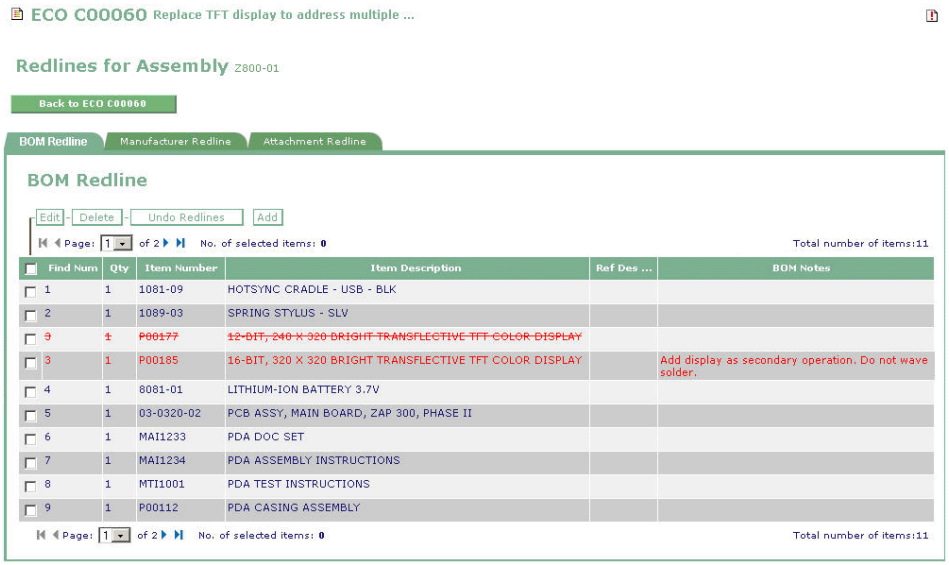
Let's go back to the ECO **Affected Items** tab to continue the scenario.

Figure B-13: The ECO Affected Items Tab



Agile has a redlining mechanism that clearly displays changes to the BOM, the manufacturers or to drawings. In this case, the BOM is being redlined to replace the faulty display. You can see that the affected item has an icon on the left , indicating that it has been redlined. Selecting the redline icon in the **Affected Items** tab displays redlines.

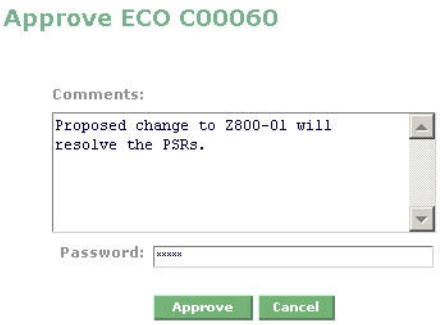
Figure B-14: The ECO BOM Redlines tab



You can see that P00177, the 12-bit display has been crossed out and P00185, the 16-bit display replaces it. There are also some assembly notes regarding the assembly that address the wave soldering problem report we saw earlier.

In this scenario, Joe is happy with the proposed change so he will approve it by clicking the approve icon in the main menu bar. As an additional security measure, the user is asked to enter his or her password to confirm the approval and optionally enter a comment.

Figure B-15: the ECO Approval



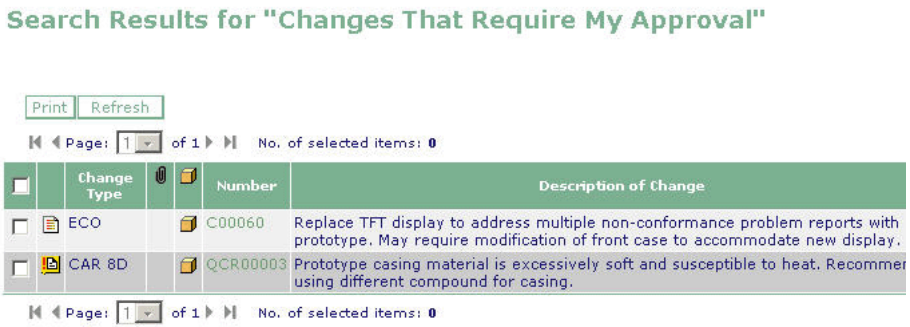
Managing Cost Information

Craig, the purchasing manager, also needs to approve this change. Agile's robust roles and privileges system provides Craig with different privileges than Joe.

Craig received an email notification from Agile and could open the ECO from the email in the same way as Joe. Agile Advantage also provides an inbox that consolidates all the required actions into one place. The inbox is available from the main search folder.

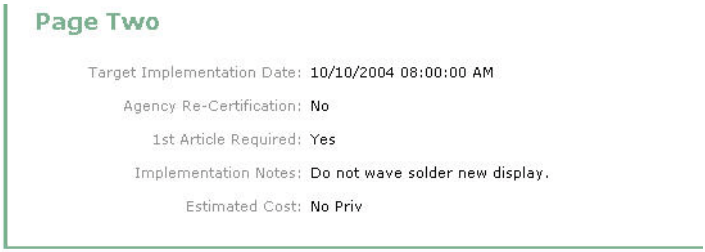
All the changes that require Craig's approval are available by clicking on the "Changes that Require My Approval" search.

Figure B-16: The "Changes that Require My Approval" Results



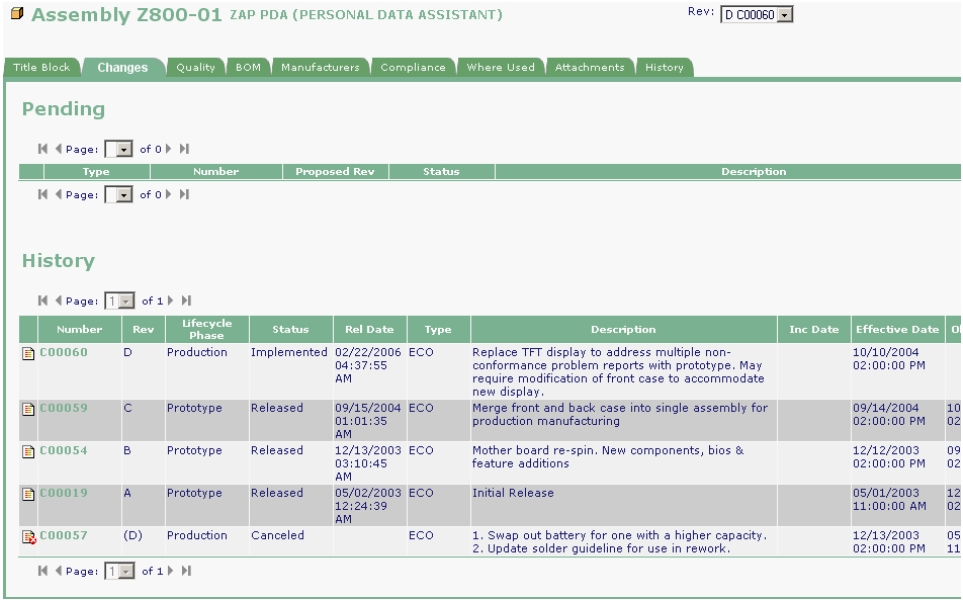
We can see that Craig needs to approve our ECO and a QCR. Clicking on the ECO number brings up the same tabbed dialog that Joe saw. On the page two section he cannot see the **Estimated Cost** information because the Agile administrator restricted Craig from seeing this information. The text "No Privilege" is displayed to indicate that the user does not have the privilege to see the information.

Figure B-17: The ECO Page Two with No Privilege



As the purchasing manager, Craig is concerned that the new display may cost more than the old display, cutting into profits. We can look at the target cost information for each revision of the part by looking at the **Part Changes** tab.

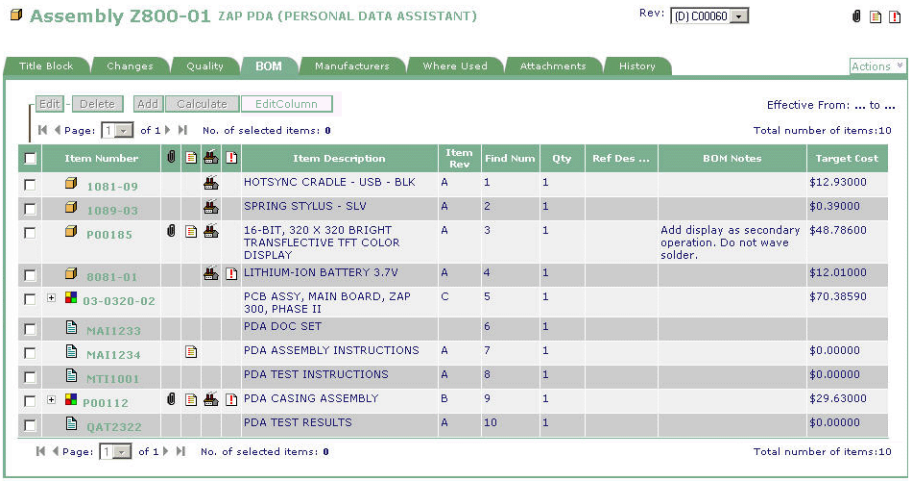
Figure B-18: The ECO Part Changes Tab



We can see there are completed revisions A, B and C, one cancelled revision as well as one pending revision. The target cost of the new proposed Revision D C00060 is $187.08. Revision C of the assembly had a target cost of $181.16. Revision D will result in a cost increase of about 3.3%. We'll assume that this is acceptable for this scenario, but it is clear that this may raise some red flags.

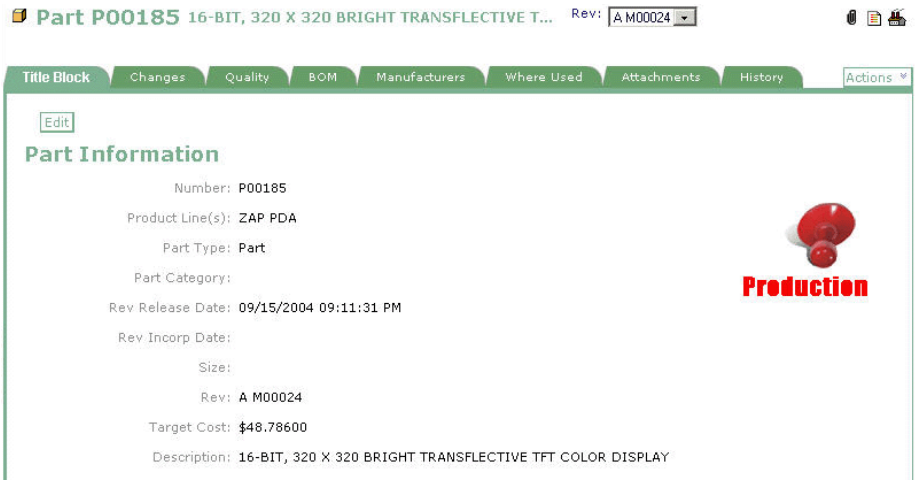
Agile Advantage has a robust mechanism of computing the cost for parts based on the manufacturer parts and the suppliers. Let's take a quick look at how that works now by examining the **BOM** tab of the part.

Figure B-19: The Part BOM tab



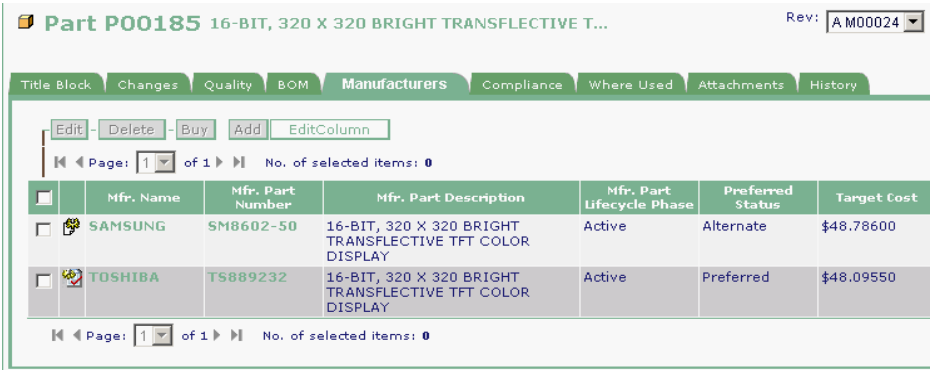
You can see that each part and assembly has a target cost. These costs are added up to compute the assemblies' **Target Cost**. The cost of the new display is $48.79. We can dig into this part to examine how the target cost is computed by opening the Display.

Figure B-20: The Part Title Block- Display



The target cost is $48.79. If this part had a BOM, the target cost would be the summation of the components and sub-assemblies. Since this is a component, the **Target Cost** is computed from the cost of the manufacturer parts which can be accessed from the **Manufacturers** tab.

Figure B-21: The Part Manufacturer tab



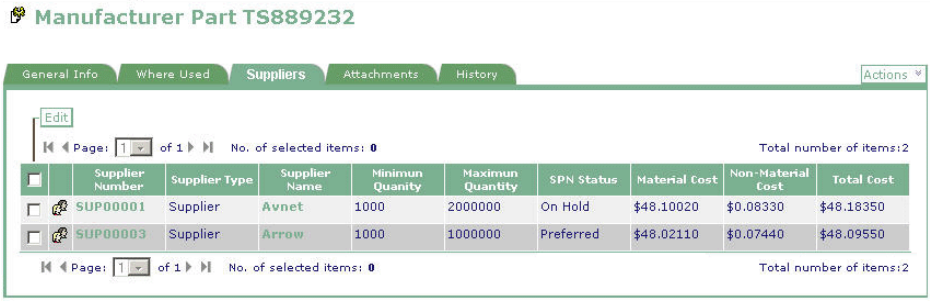
The display has two manufacturers: Toshiba and Samsung. We can see that the target costs for each are slightly different. Also note that the Toshiba is the **Preferred** part. The preferred part cost is used in the target cost computation. Let's see who supplies the Toshiba part by double-clicking on the Toshiba manufacturer part.

Figure B-22: The Manufacturer Part General Info tab



The target cost is displayed on the manufacturer part. The **Suppliers** tab shows who supplies the manufacturer part.

Figure B-23: The Manufacturer Part Suppliers tab



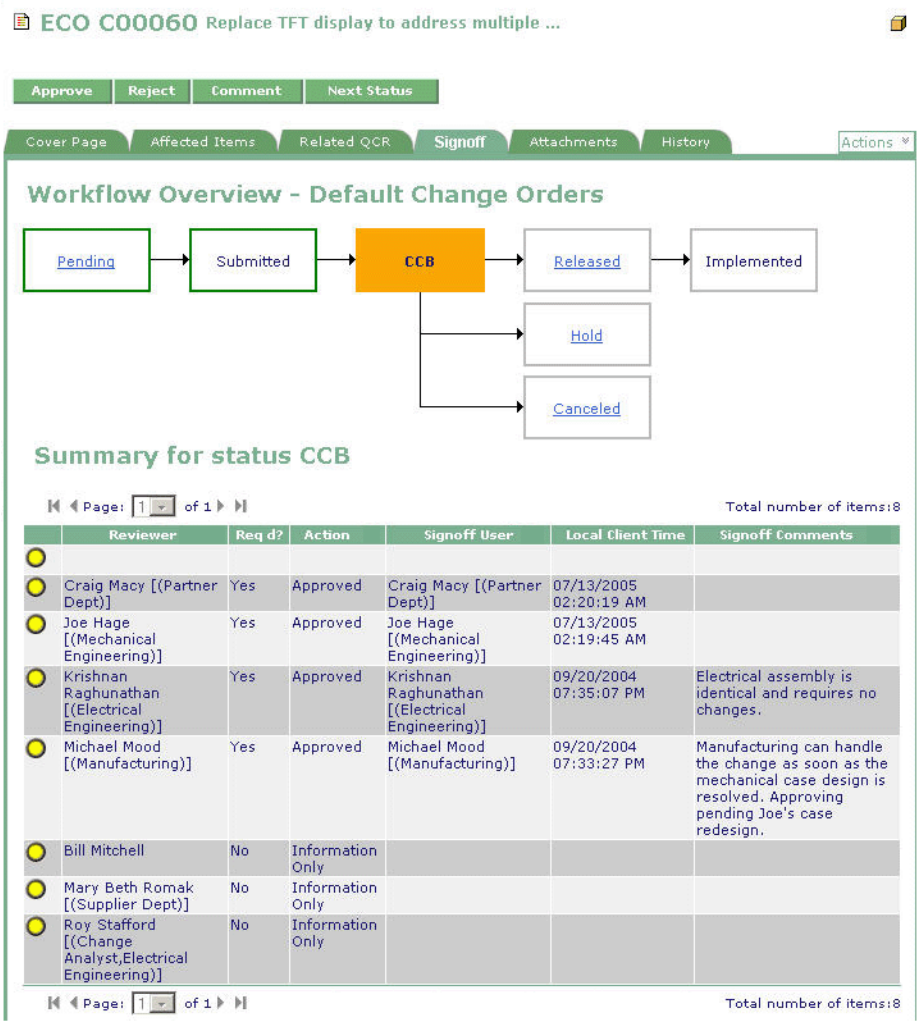
You can see there are two suppliers for the part: Arrow and Avnet. The total cost is computed by adding the material and non-material costs. The Arrow part is preferred and that is the cost used for the target cost rollup.

Let's assume that Craig is OK with cost increase and is happy with the change. He also approves the ECO in the same manner as Joe.

Releasing a Change

Now that all the required users have approved the change, it is ready to be released. Tony is the Change Analyst for this ECO. He can be notified via email that the change is ready to release and can also access the change via his **Inbox**. We'll start by opening the **Signoff** tab of the ECO.

Figure B-24: The ECO Signoff Tab

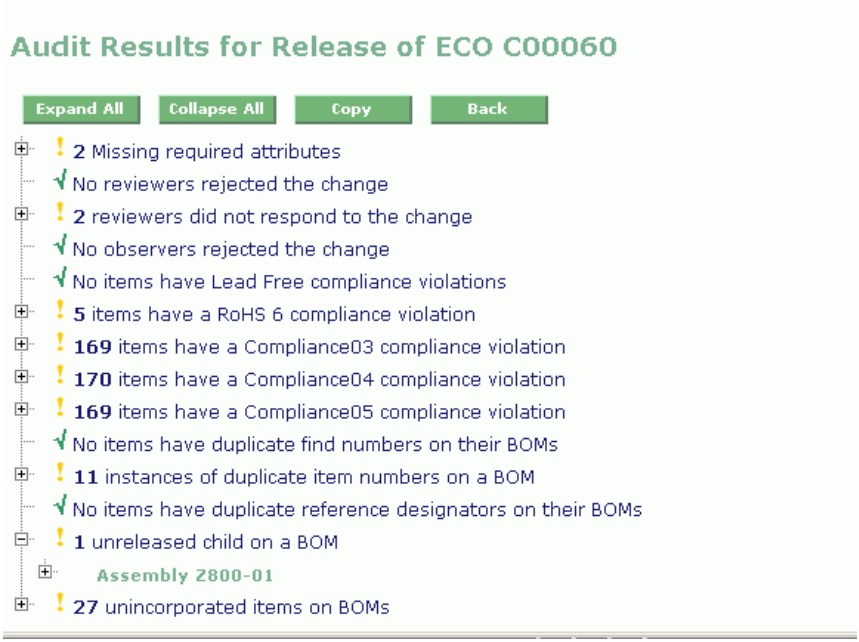


You can see that there are 5 main states in this workflow and we are now in the CCB state indicated by the yellow icon. The completed states have green icons and the uncompleted states have a white icon.

The Agile administrator is able to easily configure existing workflows and create new workflows with any number of states. We can see that Craig, Joe, Krishnan and Michael approved the change. There were also 3 users who were notified about the change, but their approval is not required. Bill Mitchell is simply a contact and does not have a login to Agile. Including him here sends him notification via email that the change is being reviewed.

Agile has an audit feature that tells the user what needs to be done to move the change to the next state. This can be run by clicking the **Audit Status** button on the **actions** menu.

Figure B-25: The Audit Results for Release Page

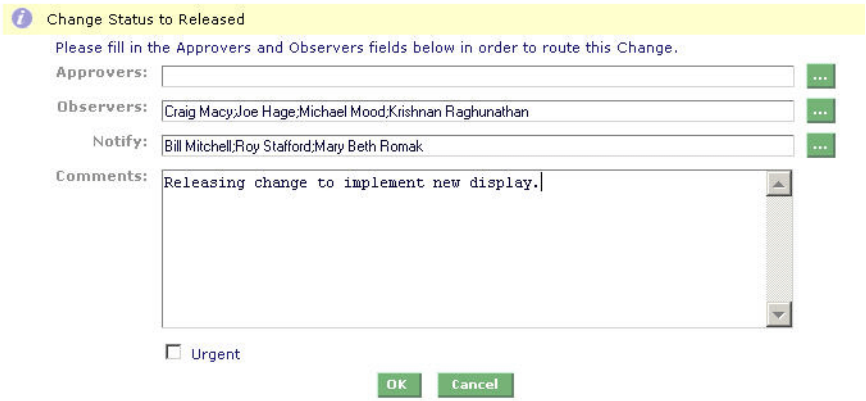


There is a warning that one of the children of Z800-01, the ZAP PDA, has not been released. There is SmartRule setting to allow, disallow or warn the user when releasing a parent assembly with unreleased children. In this scenario, it is set to **Warning**. In this case, the unreleased child is the product documentation and we have decided it is OK to release the parent assembly before the documentation is complete.

The workflow can be configured so that when all approvers approve the change, it is automatically promoted to the next state, assuming there are no warnings. In this case, everyone has approved but there was a warning regarding the unreleased document so it needs to be manually released.

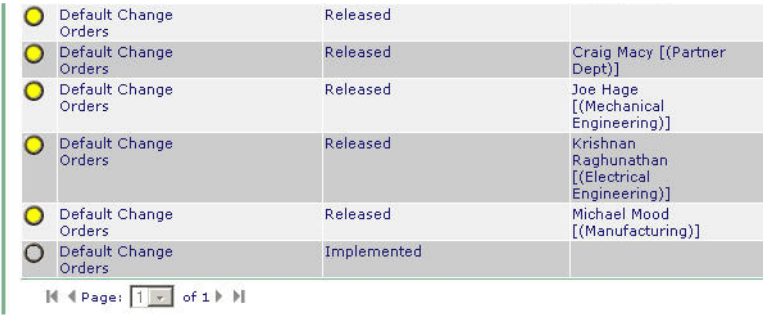
The change can be moved to the next status, in this case released, by clicking the **Next Status** button. Approvers, observers and notifications can be assigned as well as comments if needed.

Figure B-26: Release the Change



The change is now released and revision D of part Z800-01 is now the latest released revision. The **Signoff** tab is updated.

Figure B-27: The ECO Signoff - Released

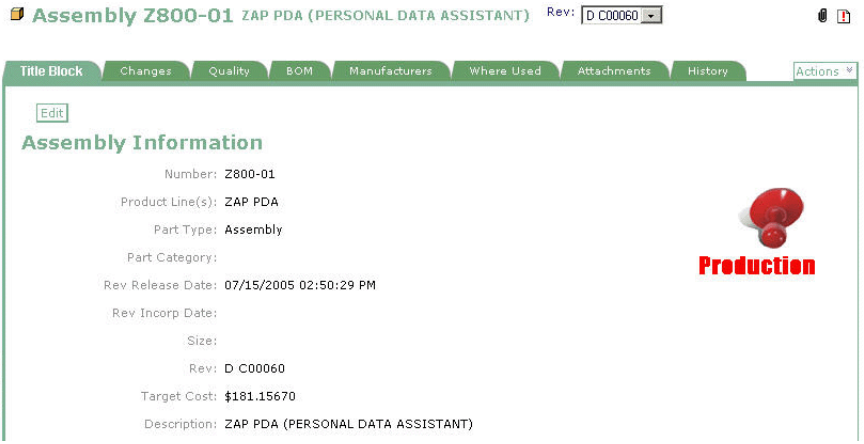


	Default Change Orders	Released	
	Default Change Orders	Released	Craig Macy [(Partner Dept)]
	Default Change Orders	Released	Joe Hage [(Mechanical Engineering)]
	Default Change Orders	Released	Krishnan Raghunathan [(Electrical Engineering)]
	Default Change Orders	Released	Michael Mood [(Manufacturing)]
	Default Change Orders	Implemented	

Page: 1 of 1

And the part's lifecycle phase is updated for revision D on the **Title Block.**

Figure B-28: The Part Title Block - Production



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