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Agile PLM 9.3.1 New Features Quick Overview
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Agile PLM 9.3.1 introduces –
- Recipe & Material Workspace, a complete PLM solution designed for the Pharmaceutical Industry,
- ongoing improvements to Web Client capabilities,
- several enhancements to core PLM use cases,
- a custom User Interface (UI) and process integration potential through out-of-the-box Web Services, and
- a more consistent UI throughout all Agile PLM modules.

The features of 9.3.1 demonstrate the ongoing product investments by Oracle, which provides value for customers upgrading to the latest version of Agile PLM.

This document addresses new capabilities added in 9.3.1 as compared to Agile PLM 9.3.0.

NOTE: This document is a supplement to the release Readme and all other manuals, like the Capacity Planning Guide. It is intended to be a supplement to the other material and does not replace the need to read and understand those documents. Errors contained in this document are not commitments to provide features.

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1   Agile PLM 9.3.1 Resources provided by Oracle

Oracle offers extensive training and documentation for customers to learn about Agile PLM 9.3.1. Below is a list of resources that can be leveraged:

- Software download from Oracle Edelivery: http://edelivery.oracle.com/
  - Note: The initial documentation package is no longer provided on Edelivery. Please go to the documentation page to download the latest documentation.
- Agile PLM Documentation Page at Oracle Technology Network (OTN): http://www.oracle.com/technetwork/documentation/agile-085940.html
- Support through Oracle Support: https://support.oracle.com/
- Samples for 9.3.1 are added to two sites
  - http://www.oracle.com/technology/sample_code/products/agile/9.3/index.html
  - https://agileplm-projects.samplecode.oracle.com/
- Oracle WIKI of Key Links: http://wiki.oracle.com/page/Agile+PLM
- Agile PLM Solution Factory: http://www.oracle.com/goto/plmsolutionspace
- Agile PLM blog: http://blogs.oracle.com/PLM
- Twitter: http://twitter.com/agileplm
- Agile PLM Fusion Middleware (FMW) Best Practice Center: http://www.oracle.com/technology/tech/fmw4apps/agile/index.html
- Transfer of Information Recordings available through Oracle Support: https://support.oracle.com/
  - These are recording of Agile PLM Product Managers discussing the major new features of Agile PLM 9.3.1. They are available to any customer with licenses and support for Agile PLM.
  - 9.3.1 recordings are available through Support Note 1220374.1
  - 9.3.0 recordings are available through Support Note 854537.1
- Agile PLM Community Page available through Support or at https://communities.oracle.com/
  - In Support, select Community link in the top tab bar
  - On the top left side of the page, find or select "Agile PLM Product Lifecycle Management"
- External Yahoo! User Groups (note: content is not managed or controlled by Oracle)
  - http://tech.groups.yahoo.com/group/WRAU/
  - http://tech.groups.yahoo.com/group/IAUG/
  - http://tech.groups.yahoo.com/group/AgileAPI/

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2   Features Added in Agile PLM 9.3.1

New Features added in Agile PLM 9.3.1 can be grouped into 4 categories:
- Recipe & Material Workspace, a PLM solution targeted at the Pharmaceutical Industry
- User Experience
- New and Enhanced PLM Use Cases
- Automation and Web Services

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

2.1   Recipe & Material Workspace, a complete solution of Agile PLM Capabilities for the Pharmaceutical industry

Agile PLM 9.3.1 introduces two modules in Recipe & Material Workspace (RMW) specifically designed to improve productivity and traceability in the Pharmaceutical development process:
- Material and Equipment Management
- Recipe Management

There are significant additional launch and TOI materials available in support these robust modules. These additional Agile PLM capabilities enable customers to ensure a completely traceable drug development process that can evolve into clinical supply management.

When combined with existing Agile PLM enterprise capabilities, the solutions available for pharmaceutical organizations include the following use cases:
- **Drug development portfolio management:** Enables critical program deliverables and regulatory requirements to be enforced by improving drug development execution, program management, and cross-functional collaboration.
- **Comprehensive drug development records:** Structured drug development records facilitate re-use of Common Technical Documents (CTD) by capturing complex multi-dimensional data from material, equipment, processes/recipes, and analytical methods in one system.
- **Efficient clinical supply management:** Delivers faster clinical trials by allowing material allocations, equipment reservations, and recipe variations during the clinical trials phase to be efficiently and effectively managed.
- **Faster technology transfer:** Facilitates the scale-up to commercial drug production volumes by better enabling analysis of the drug-product value chain, including suppliers, materials, equipment, and processes.
- **Integrated quality and risk management:** Delivers an effective enterprise quality management solution that enables new guidelines and QbD practices to be built into the beginning of product development for faster and more efficient submissions.
- **Integrated packaging and label management:** Improves the regulatory integrity of commercial content by providing a global repository for all packaging components, digital assets, and marketing collateral, all of which provide development evidence.
- **Global product registration:** Provides the content needed to support regulatory submittal requirements. This content is used for ongoing global product proliferation. Re-use of registration content can significantly improve ROI for each new product developed.

2.2 User Experience

Agile PLM 9.3.1 continues our investment in making your users more productive in the Agile PLM Web Client interface by allowing more customization of user screens. We also continue to ensure support for new browsers.

- **Form Customization**
  - Hiding fields on Title Block by Subclass:
    - Display of Page 1 and 2 fields can be controlled at the Subclass level
    - This adds significant customization potential by hiding non-relevant fields completely on a subclass
    - For example, if a Product ECO and an ISO ECO require different fields, the administrator can hide fields for the different subclasses
  - Fully hiding fields on Title Block by Read Privilege – "No Privilege" fields can be hidden:
    - Prior to 9.3.1, Title Block or Cover Page fields hidden using Enforce Field Level Read and Read Privilege Mask AppliedTo settings always appeared on the form with No Privilege or "----".
    - In 9.3.1, these fields do not have to appear at all depending on an additional privilege for "Display No Privilege Fields".
    - Several additional use cases are enabled, including altering the form contents for a user depending on Lifecycle Phase or Workflow Status.
  - Order and display of tabs can be customized:
    - Administrators can create Tab configurations in a Web Client admin screen for Classes or Subclasses and assign the profiles to users or user groups.
    - Tab configurations define the order of tabs, required tabs, and displayed tabs.
    - Each time a user opens an object, their Tab configurations will be checked to determine what to display
    - For example, if operations users want the Attachments tab on a Part to be the second tab from the left, the administrator can create a new Tab configuration for Parts subclass, define the Attachments tab to be second, and assign the configuration to a group of operations users. The next time the user opens a Part, they will see the Attachments tab in its new place.
  - Heading Links on Title Block:
    - Enables easy navigation though Title Block/Cover Page screens, remaining available at the top of the page all of the time.
- **Streamlined Data Entry** – features that allow users to complete tasks in a natural, efficient way, which helps reduce errors
  - Support to add data to tables through Saved / Advanced Searches:
    - Users can leverage saved searches to add rows to tables
  - Support to copy object identifiers from Excel and paste into tables:
    - Users can paste object lists from Excel into the Add box on a table
    - Firefox users may require a setting change, which is documented in the TOIs.
  - Inactive List Values can be Hidden:
    - Each user can choose to view or hide inactive list values
  - Filtered Dynamic Lists:
    - Dynamic lists in Agile PLM represent lists of objects – like Items, Changes, Users, etc.

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- Since Agile PLM 9.0, these lists have been available to associate to List or MultiList attributes on Page 1, Page 2, or Page 3 of Agile objects
- Many customers have wanted to subdivide these lists, whether by Subclass or other matching criteria on the relevant objects
- In 9.3.1, all Dynamic Lists have a Criteria property which defines a filter for use on the list when being displayed in the UI, for example "All Resistors" versus "All Items"
- Administrators can create new Dynamic Lists with associated Criteria as needed to support customer business processes
- Please review the documentation available in the *Agile PLM Administrator Guide* as well as the TOI for PLM administrators, which reviews this new feature. Note that this feature is not related lists, or altering the content of one list based on the selections made in a different list on the same page.

2.3 Enhanced PLM Use Cases

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

- **Your Workflow Your Way**
  - Configurable Approval Password requirement:
    - Each Review or Release workflow status can be configured to collect a password or not for approve and reject actions
    - For example, a review status called could be configured to not require a password for "Approve" but require one for "Reject". When the user approves, they are not prompted for a password. If they reject, they are prompted for a password.
  - Allow a Workflow to contain multiple Hold and Cancel statuses:
    - The specific reasons for Hold status can now be configured in a workflow.
    - Specific "Manual Valid Next Status" control can be used to allow precise status movement from a Hold status.
    - If "Collect Test Results" is configured as a new Hold status in a workflow, the administrator can set Manual Valid Next Status to allow movement to "Collect Test Results" from a Pre-CCB Status, and only return to a Pre-CCB status from "Collect Test Results". This makes the new Hold status a well defined step in the workflow that can only be entered from Pre-CCB and can only return to Pre-CCB. There are many potential variations and usage of this capability.
  - Next Status button can move to any valid status:
    - Users with the correct privilege can move a Routable Object to any valid status without having to go to the Workflow tab.
  - Populate default change analyst in Workflow even if the user can't edit it:
    - Agile workflow criteria become more capable of forcing a specific Change Analyst at the Pending status.
  - Do not validate entry criteria against Completed or Canceled changes when modifying an Item:
    - When a customer is using Workflow Entry Criteria, historically the entry criteria restrictions apply at all times in the lifecycle of the Items and Changes.
    - If an entry criteria for a workflow is based on Product Line and an Item is associated with a Change leveraging that workflow, then the Product line for an Item could

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never be changed unless the administrator altered SmartRules or changed the workflow Entry Criteria. If a user tries to change the Product Line, Agile PLM throws an error message that informs alteration violates Workflow Entry Criteria.

- As of 9.3.1, violations of Workflow Entry Criteria for Changes that have reached their Complete or Cancel status will no longer be evaluated. This should enable more natural attribute modification for customers using Workflow Entry Criteria.

o Visual indicator for active (Released) Stop Ships and Deviations in tables:

- Prior to 9.3.1, the Item Changes tab display a red square when there are Released Stop Ships or Deviations against the Item. This replaces the grey circle that indicates a non-Released Change against the Item. Tables including the Item, like Search Results, BOM, or Affected Items, never displayed the red square and did not display a grey circle for released Stop Ships or Deviations.
- In 9.3.1, table results will display a red square when there is a released Stop Ship or Deviation. This provides more visibility to a user about Items that may have severe issues when reviewing Search results or other tables of Items like BOMs and Affected Items.

- **Dynamic publishing of product information**
  o New web services introduced for getting object schema and data:
    - Web Services 'loadXMLSchema' and 'loadXMLData' have been added
  o Enables auto-refresh Product Datasheets, parts list, service manuals with PLM data using simple process extensions:
    - Several samples are being published which describe how to leverage these new services
  o Potential integration with popular authoring tools (like Microsoft Word using BI Publisher):
    - The completeness of the Schema and Data services allow customers to accurately generate document templates and then combine the template with Agile PLM Object Data to create a finished document.
    - Other tools, like Adobe Framemaker, which also can use XML Schema information to create a Template and then combine later with actual Data XML, can also be used

- **Variant Management**
  o Variant management adds capability to Product Collaboration which enables customers to manage Model–Option BOMs to define the potential variations which need to be chosen in a Sales Configurator
  o This capability enables organizations to define the potential BOMs in the design organization using a Change Control process and feed the results into a Sales Configurator
  o Model and Option class subtypes introduced which enables additional UI and Business Logic
  o The Agile configuration screens incorporate editing of multiple Instances and usability improvements, including better error messages
  o Added an Instances tab to link Model–Option BOM to Instances and other navigation enhancements
  o Oracle Configurator Integration through the Design to Release Oracle Application Integration Architecture (AIA) Process Integration Pack (PIP) .

- **Improved Basic Design Management**
  o Structured display, Improved visibility of key attributes, design export
  o Extend attribute visibility to new tabs
  o Separate "Copy Files to Rev" SmartRules for Designs and File Folders

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- o Design Where Used – checkbox for "Display all versions"
- o Add Revision field to Design Version selector
- o Support Navigator with Design structures
- o Structured Get for Designs
- o Open button is available on Attachments tab.
- **Design Change Management**
  - o Workflow Routings links go to proper version
  - o Searches based on routing slip status return proper results
  - o New "Approval Status" attribute gives overall routing slip status
  - o New "Item Change Status" attribute supports better linking to Item change process.

2.4 Platform and Web Services

- Key Platform Certification Changes
  - o Application Server:
    - Updated WebLogic Version – 11gR1 (10.3.2)
    - Same iAS version - 10gR3 (10.1.3.4)
  - o Database:
    - Continued support for 10gR2 (10.2.0.4+), 11gR1 (11.1.0.6+), and 11gR2 (11.2.0.1+) (RAC and standalone)
  - o Browser:
    - Continued support for Firefox 2, 3, and 3.5 on Windows and Solaris
    - Continued support for Safari 3 and 4 on Mac
    - Continued support for Internet Explorer 7 and 8
      - Note that the new RMW modules are only supported on IE
  - o Server Operating System:
    - Add support for SuSE Linux 9 & 10 (SP3+), IBM AIX 6.1
    - Continued support for Windows Server 2003 SP3 & 2008 SP1, Solaris 9 (SPARC), Solaris 10 (SPARC and x86), Oracle Enterprise Linux 4 & 5, Red Hat Enterprise Linux 4 & 5, IBM AIX 5.3, HP-UX 11.31
  - o AutoVue for Agile:
    - Continued support for Oracle AutoVue Electro-Mechanical Professional for Agile (20.0)
  - o Server Virtualization:
    - Continued support for Oracle VM 2.1.2 with OEL 4 & 5 and Windows Server 2003 SP3

    Note: Review the Oracle Agile PLM 9.3.1 Capacity Planning Guide for the official, detailed platform certification matrix. Any errors in the list above do not override the official intended software support.
- Add Excel 2007 support for Import and Export
- Add LDAP Server support for Oracle Internet Directory (OID) 10g (10.1.4.0)
- Add Single Sign On (SSO) support for Oracle Access Manager (OAM) 10g (10.1.4.0)
- 64-bit JVM Support for more Application Server memory (AIX, Windows, Linux)
  - o This enables customers to run their Application Server with more than 2 GB of memory
- Web Services
  - o More complete feature coverage for web services (Portal Frontend):
    - Includes Folders, Inbox, Notification, Reports, Advanced Search

- o New Web Services for Document Publishing
- o Additional Tables Support:
  - Tables in the Product Cost Management (PCM) solution
  - Tables in the Product Governance and Compliance (PG&C) solution
  - Tables in the Product Portfolio Management (PPM) solution
- Improvements to Export and Search Performance
  - o Control maximum number of records to process when running a search:
    - This typically applies when a user can only discover a limited set of objects and attempts to run a broad search
    - In prior versions, the application filtered through all the objects in the system until finding the limited number of objects they could discover
    - With 9.3.1, the system limits the number of objects being reviewed to better protect the overall application server
  - o Better memory management in Export:
    - Export limits its memory use when processing very large Export sets
  - o More limits on number of objects being Exported:
    - The system limits users on how many objects they can export
- Improved Security and IP Protection
  - o Force Users to change password:
    - When an administrator changes a user password, the user optionally be forced to choose a new password on the next login
  - o Control Password expiry duration, Enforce strong passwords:
    - Allow the administrator to choose additional password "strength" settings
  - o More control over administrative privileges:
    - The majority of capabilities in PLM Administrator are now offered as AppliedTo values on Administrator privilege masks. This allows administrative rights to be carefully assigned to different users by setting up the correct Administrator privilege masks.
    - This does not address more specific administrative requests, like assigning users to manage specific Lists in the Lists node. Administrator access remains at the node and major functionality level.
  - o Supplier authentication against LDAP:
    - Restricted Supplier Users can now be authenticated against LDAP
  - o New export privilege to prevent export of attachments:
    - The Export privilege has a new applied to setting to control whether users can export attachments when exporting AXML and PDX.

3   Additional Impact of Agile PLM 9.3.1 on existing PLM Modules

This section lists new features in specific PLM solutions.

3.1   Product Portfolio Management

- Fine-grain duration of Activities (minutes or seconds)
- Additional Multi-List fields available for Dashboard
- New Projects Filtered Dynamic List

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- Improved Web Services Coverage

3.2 Product Governance & Compliance

- Import Bill of Substances into a Declaration via Microsoft Excel
- Ability to use transformation files when importing compositions

3.3 Product Cost Management

- Comprehensive set of actions on Analysis tab
- Filter, sort on multiple columns to quickly get to the right data
- Multi-column filtering to better track RFQ responses
- Configurable Cost rollups via Excel
- Price Models:
  - Web Services support for exporting data (BOM, AML, Responses etc) from Sourcing Project
  - Users can export PCM data into a Spreadsheet, apply their own Price Models, recalculate the costs using their own formula and data from external sources and import the recalculated cost back into PCM using SDK
  - Price Models Sample available for Excel through samples portal

3.4 Product Quality Management

- Extensive form customization options by hiding fields:
  - With the new features to hide fields by subclass and by read privilege, forms for PQM subclasses can now be completely configured for the targeted users
  - User training for processes no longer has to include explanation of which fields are not needed for the current process