Agile Product Lifecycle Management for Process

Reporting User Guide

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Document Control

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Sept-07	Agile/Oracle	1.0	Initial release, Part No. TPPR-0029-5.1A
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Sept-09	Oracle	3.0	Third release, Part No. E12387-01

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About This Manual

Agile Product Lifecycle Management for Process Documentation

The Agile Product Lifecycle Management (PLM) for Process 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 PLM for Process 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 PLM for Process Documentation folder available on your network from which you can access the Agile PLM for Process documentation (PDF) files.

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Audience

This guide is intended for end users who are responsible for creating and managing information in Agile Product Lifecycle Management for Process. Information about administering the system resides in the *Agile Product Lifecycle Management for Process Administrator User Guide.*

Variability of Installations

Descriptions and illustrations of the Agile PLM for Process user interface included in this manual may not match your installation. The user interface of Agile PLM for Process applications and the features included can vary greatly depending on such variables as:

- Which applications your organization has purchased and installed
- Configuration settings that may turn features off or on
- Customization specific to your organization
- Security settings as they apply to the system and your user account

Where to Find Information

Consult the table below to find specific information from the relevant Agile Product Lifecycle Management for Process information source.

Table 1: Agile Product Lifecycle Management for Process documentation topics, by source

Information type	Reporting User Guide	Admin. User Guide	Release Notes	Agile training	Help Desk	Agile sales rep
Administering Agile Product Lifecycle Management for Process		●		●		
Cache management		●				
Core data management		●				
Creating specifications				●		
Custom sections		●		●		
Extended attributes		●		●		
Feature requests					●	●
Group management		●				
Installing Agile Product Lifecycle Management for Process				●		●
Known issues			●			
Printing				●		
Reporting	●			●		
Resolved issues			●			
System-based roles		●				
Technical support					●	

Document Conventions

The following formatting elements appear in Agile Product Lifecycle Management for Process documentation.

Element	Meaning
Helvetica Condensed, 9 pt. bold type	A user interface (UI) element that a procedure is instructing you to click, select, or type into. For example, buttons or text entry fields.
`9 pt. monospace font`	Code samples
`10 pt. monospace font`	File names or directory names
Blue italic font	The linked portion of a cross-reference. Click it to go to the referenced heading, table, or figure.
Minion Typeface, Title Case	A named UI element that a procedure is describing but not instructing you to click, select, or type into.
Note Minion 11.5 pt, with faint blue bar over & under	Alerts you to supplemental information.
Caution! Minion 11.5 pt, with faint red bar over & under	Alerts you to possible data loss, breaches of security, or other more serious problems.
Important Minion 11.5 pt, with thick red bar over & under	Alerts you to supplementary information that is essential to the completion of a task.

CHAPTER 1
Introduction

This chapter presents an overview of the Reporting application. Topics in this chapter include:

- *Touch Points with Other Applications*

The Reporting application offers two ways to access and report on data in Agile Product Lifecycle Management for Process.

The first method of accessing report data is through an object model-based ad hoc tool that allows users to define their own search criteria and result definitions. This allows for ad hoc reporting against much of the data in Global Specification Management (GSM) and Supply Chain Relationship Management (SCRM).

The second method of accessing report data is through a user interface to other third-party report generation tools. The Reporting application provides an interface to third-party reports so that they can be exposed and run directly from Agile Product Lifecycle Management for Process, leveraging data to search for and select inputs. This method requires extra configuration on the Agile Product Lifecycle Management for Process side as well as access to a supported third-party reporting engine. To learn more about this extra configuration, see the *Agile Product Lifecycle Management for Process Configuration Guide*.

For general information on using Agile Product Lifecycle Management for Process software, see the *Agile Product Lifecycle Management for Process Getting Started Guide*.

Touch Points with Other Applications

The Reporting application provides reporting capability for data in the Global Specification Management (GSM) and Supply Chain Relationship Management (SCRM) applications. See *Running a Report* on page 2-4, or for more information, refer to the *Agile Product Lifecycle Management for Process Global Specification Management User Guide* or the *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide*.

CHAPTER 2

Using Reporting

This chapter describes the capabilities and applied uses of the Reporting product. It includes the following topics:

- *Getting Started with Ad Hoc Reporting*
- *Custom Layouts*

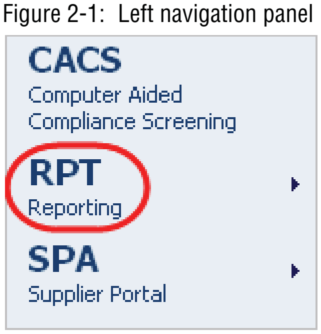
The Reporting application enables you to create ad hoc reports, create reporting layouts, and run customized, third-party reports.

Getting Started with Ad Hoc Reporting

Accessing Reporting

To access Reporting, select **RPT** from the left navigation panel.

Figure 2-1: Left navigation panel



Using the Reporting Page

Figure 2-2 shows the basic Reporting search page, which consists of fields that are defined in table 2-1 below:

Figure 2-2: Reporting page

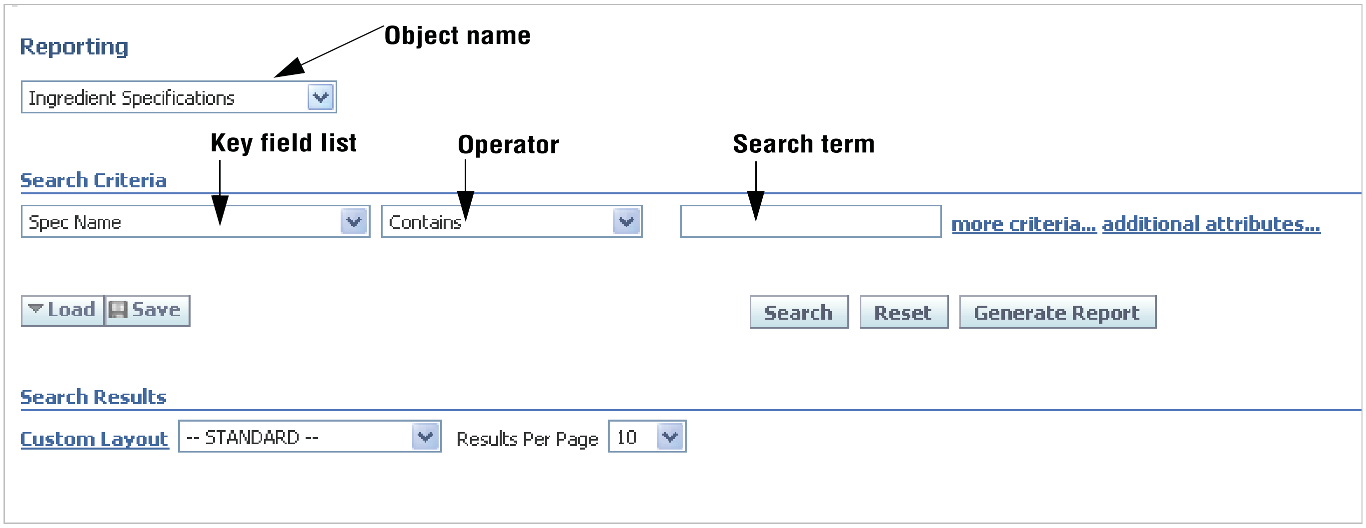


Table 2-1: Search field definitions

Field	Description
Object name	Displays a drop-down list of object types that are the information the report will be performed on.
Key field list	Displays a drop-down list of criteria based on the selected object type.
Operator	Displays a drop-down list of operators based on the criteria that you choose in the key field list. Examples include Equals, Not Equals, Contains, and Starts With.
Search term	Further define your report by entering specific text or numbers related to the first two report fields. If this field is preceded by an add data icon ( ), click the icon to view a dialog box with available choices.
more criteria	Enables you to display another row of search criteria fields. This acts as an "and" function, which narrows your search results.
additional attributes	Displays a dialog box where you can specify extended attributes or custom sections as search criteria. The available choices are defined by the object you selected in the **Object name** field. Refer to the *Agile Product Lifecycle Management for Process Getting Started Guide* for more information about searching for custom data.
Results Per Page	Sets the number of search results to display at one time.

The Reporting search page includes the following buttons and links:

Load —Loads a saved search.

Save—Saves search criteria in a reusable library. Use this option if you use certain search criteria often.

Search—Displays your search results. The number of search results returned is limited to 500 entries. If your report generates more than 500 matches, the report must be generated and queued up. See *Viewing Queued Reports* on page 2-5 for more information.

Reset—Clears all search criteria fields and results.

Generate Report—Generates your report results.

Export—Writes the search results to an Excel file and displays a dialog box for downloading or viewing the exported file.

Custom Layout—Defines the report layout. Custom layouts are explained in greater detail on page 2-6.

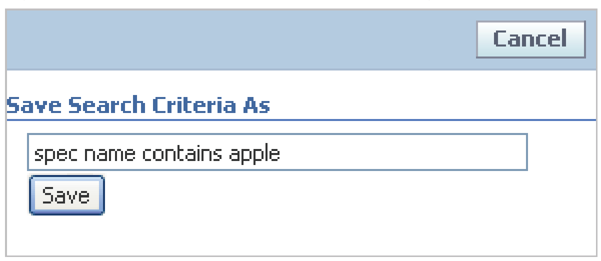
Saving Search Criteria

Once you have entered your search criteria, you can save those criteria for later use. This feature can be a great help when search criteria become very complex.

To save search criteria:

1. Enter your search criteria.
2. Click **Save.**
3. A Save Search Criteria As dialog box displays, as shown in figure 2-3.

Figure 2-3: The Save Search Criteria As dialog box



4. Type a descriptive name for the search criteria to save and click **Save.**

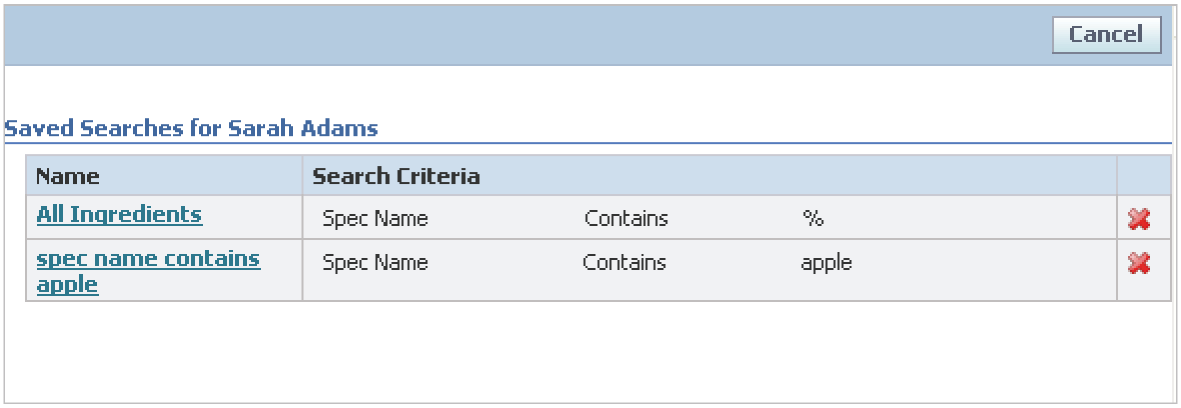
After you have saved one or more searches, you can easily retrieve saved search criteria.

Note Only the search criteria is saved; the contents of the report and the custom layout are not saved.

To retrieve a saved search:

1. On any search form, click **Load** and then select **Load Saved Search** from the drop-down list. A dialog box displays, showing a list of all of the searches that you have saved, as shown in figure 2-4.

Figure 2-4: Saved searches dialog box



2. Click the linked name of the saved search to load the criteria. Reporting closes the dialog box and loads the saved search criteria into the main search page.

Running a Report

You can create ad hoc reports based on the following Global Specification Management (GSM) specifications:

- Ingredient specification
- Menu item specification
- Packaging material specification
- Printed packaging specification
- Product specification
- Trade specification

You can also create ad hoc reports based on the following Supply Chain Relationship Management (SCRM) entities:

- Supplier Document Management
- Facilities

Report attributes vary depending on the business entity as well. For example, to run a report for a facility, the report attributes are fields within a facility profile, including (but not limited to):

- Facility name
- Company name
- Sourcing taxonomy

Specify which attributes to include on a report using Custom Layout feature, as described on *Custom Layouts* on page 2-6.

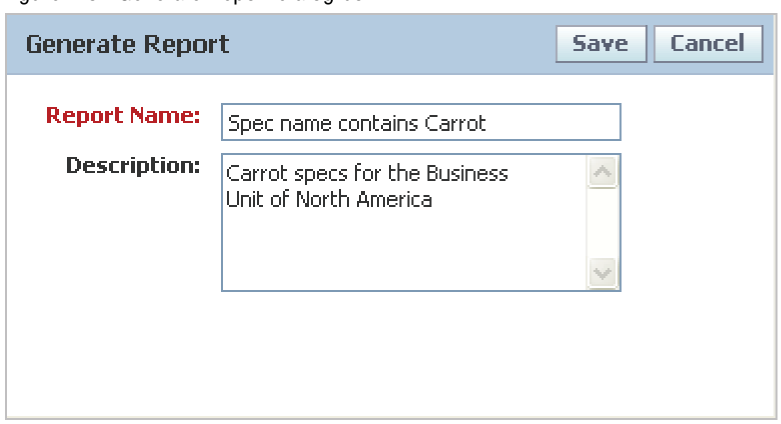
To perform a report, select **RPT > Ad Hoc Reports > Reporting** from the left navigation panel. The Reporting search page displays. Select a business entity from the **Object name** drop-down list, then specify search criteria values in the search fields. Click **Search**. The search results table displays all data objects matching the search criteria, in ascending order by default.

Generating a Report

Click **Generate Report** to submit reports to the report generation queue. The **Generate Report** button is found on the Reporting page, as seen in figure 2-2, on page 2-2. When a report request in the queue is processed, it will be created or saved in Excel format so that you can click the presented link to download, open, or save it. The report can also be saved in a comma delimited format.

After you click **Generate Report**, a dialog box is displayed, as shown in figure 2-5. Fill in the **Report Name** (required) and **Description** fields, then click **Save**.

Figure 2-5: Generate Report dialog box

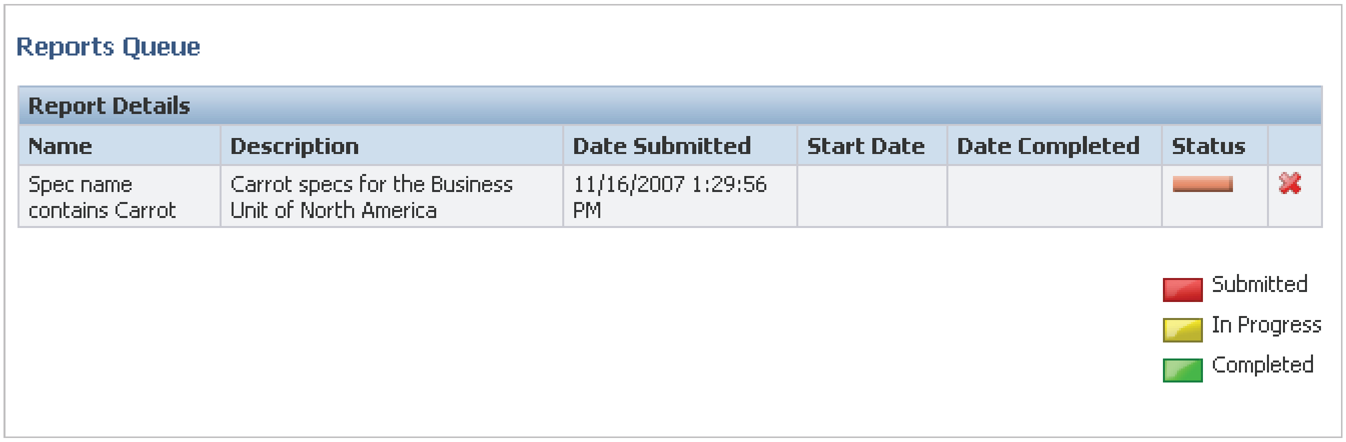


When you click **Save**, the report is added to a queue for processing offline.

Viewing Queued Reports

To view reports that have been queued, click **RPT > Ad Hoc Reports > Reports Queue** from left navigation panel. The Report Queue page, shown in figure 2-6 below, displays report details. The **Status** column displays the status of the report as indicated by a red, amber, or green bar.

Figure 2-6: Reports Queue page



Report Status

The **Status** column displays one of the following statuses:

- Red status means that the report request has been submitted but the report is not yet being generated.
- Amber status means that the report is currently being generated.
- Green status means that the report is ready. When the status turns green, the name of the report becomes a link. Clicking the link gives you the option to either view the report or save it. When the report is ready, the person who generated the report receives an email notification.

Reports that are run in the Reporting application are not limited in size like search results and can sometimes be very large. Reports are run in order of submission to the reporting queue.

Custom Layouts

As previously mentioned, the setting you provide for custom layouts determines which fields are displayed on the report. Select a layout based on the purpose of the report. Access the User Customized Layout page by either:

- Clicking the linked **Custom Layouts** field on the Reporting page under the Search Results section. Refer to figure 2-2, on page 2-2 for more information.
  Or
- Select **RPT > Ad Hoc Reports > Custom Layouts** from the left navigation panel.

Defining a Custom Layout

As figure 2-7 shows below, the User Customized Layout page displays all the object types on which ad hoc reports can be created. Select an object type, and then click the edit icon ( ) to display all the defined layouts for that object type. Figure 2-8 below shows all the custom layouts for the Facilities object type. In this example, “Summary View” is the default layout that will be displayed when you run a report on Facilities.

Figure 2-7: User Customized Layouts page

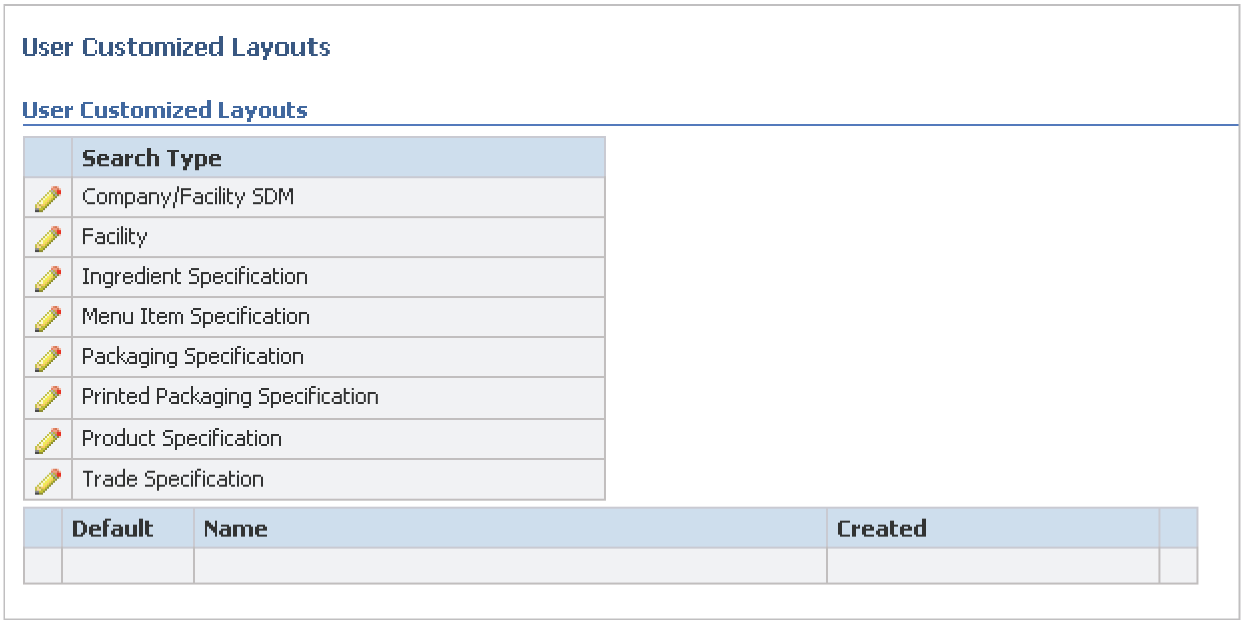
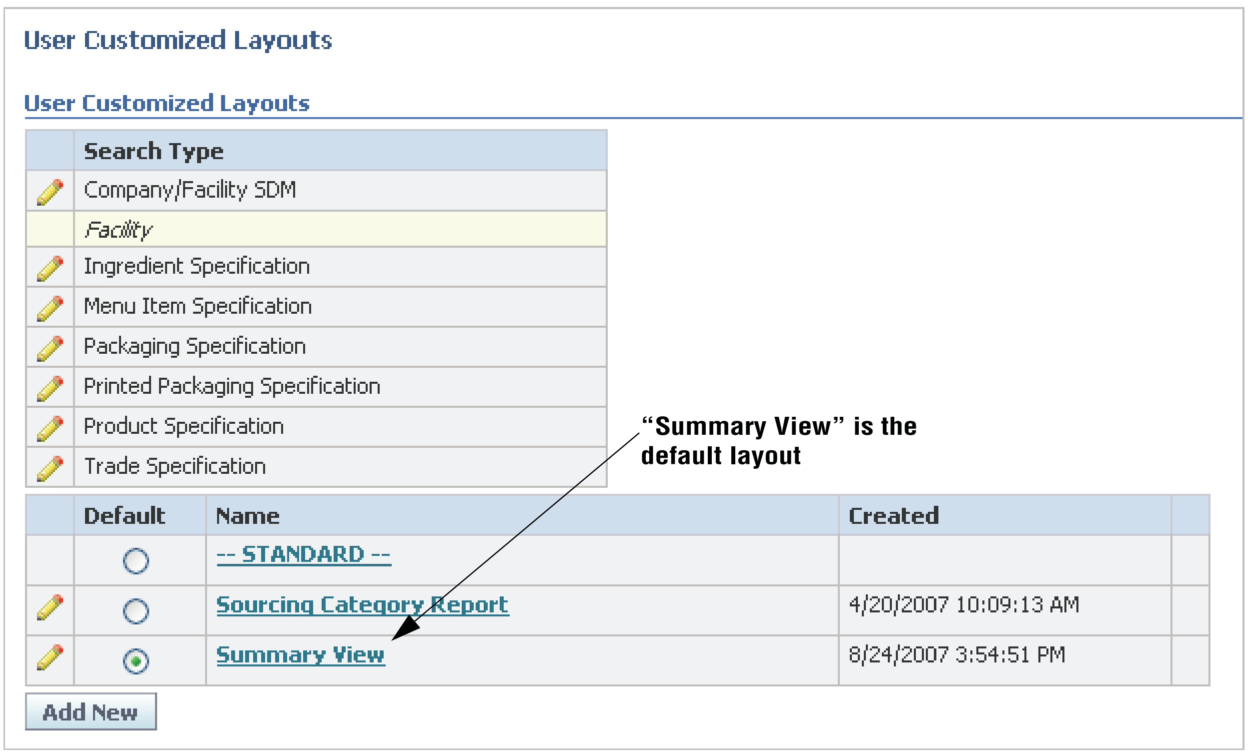


Figure 2-8: Available layouts for Facility object type

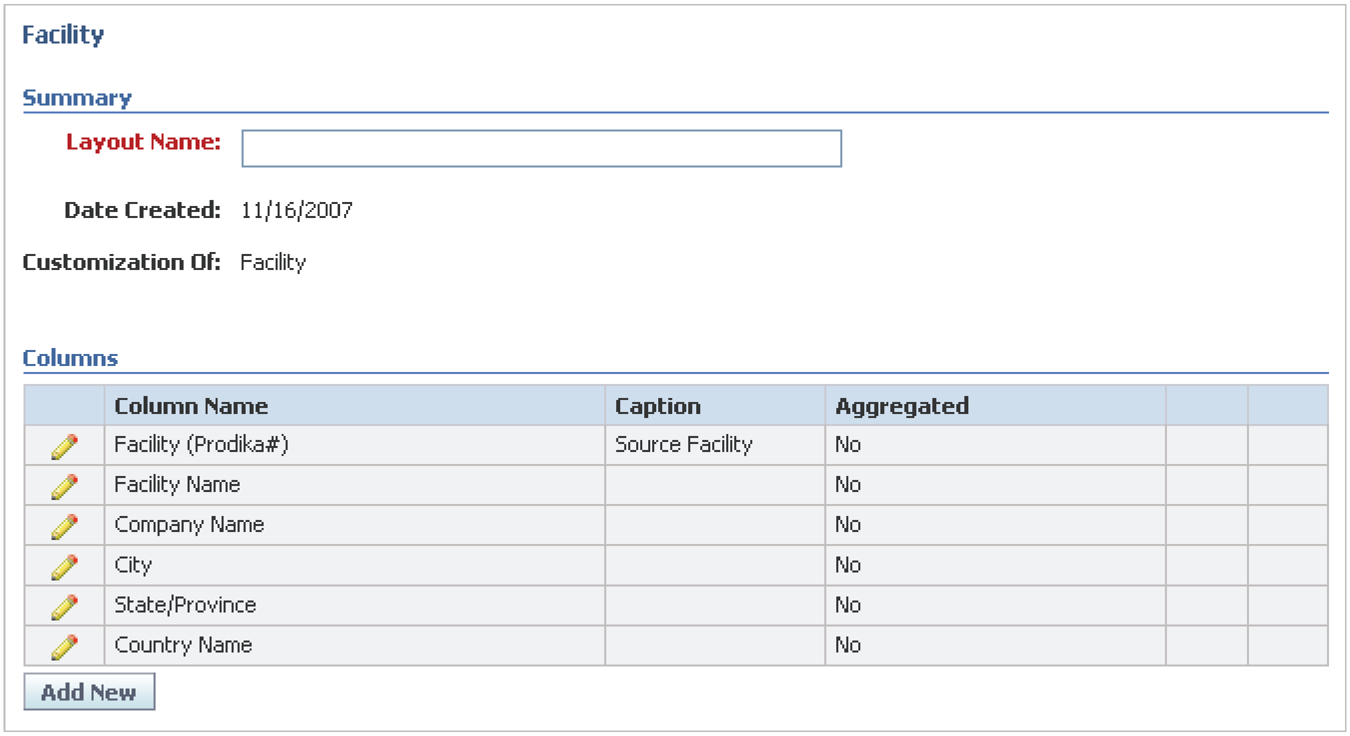


Creating a New Layout

Click **Add New** to create a new layout. Next, type the name of the layout in the **Layout Name** field (required). Remove the fields not required from the Columns section. For details, refer to the *Modifying a Layout* on page 2-10.

Figure 2-9 below shows the new layout page for Facility.

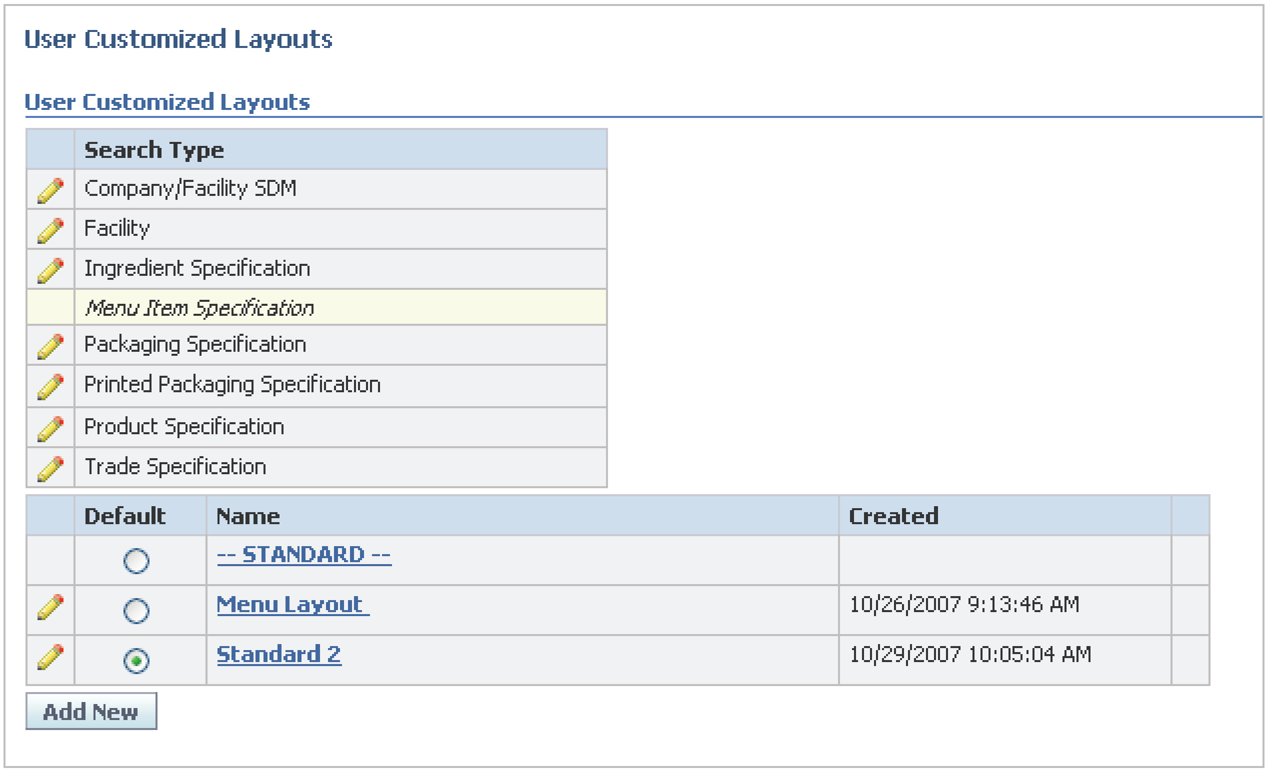
Figure 2-9: Facility page



Marking a Layout as Default

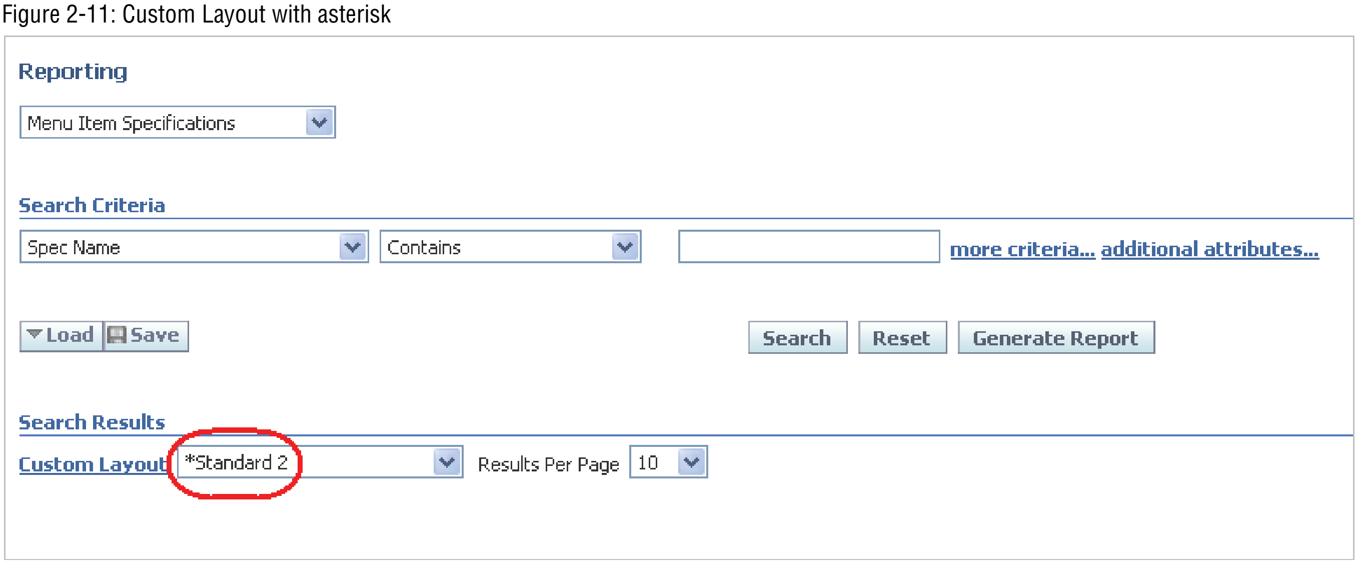
Each object type has a default, out-of-the box layout called "--STANDARD--". These standard layouts will be used if you do not create custom layouts for the object types.

Figure 2-10: Marking a default layout



On the Reporting page, the default custom layout is marked with an asterisk, as shown in figure 2-11 below.

Figure 2-11: Custom Layout with asterisk



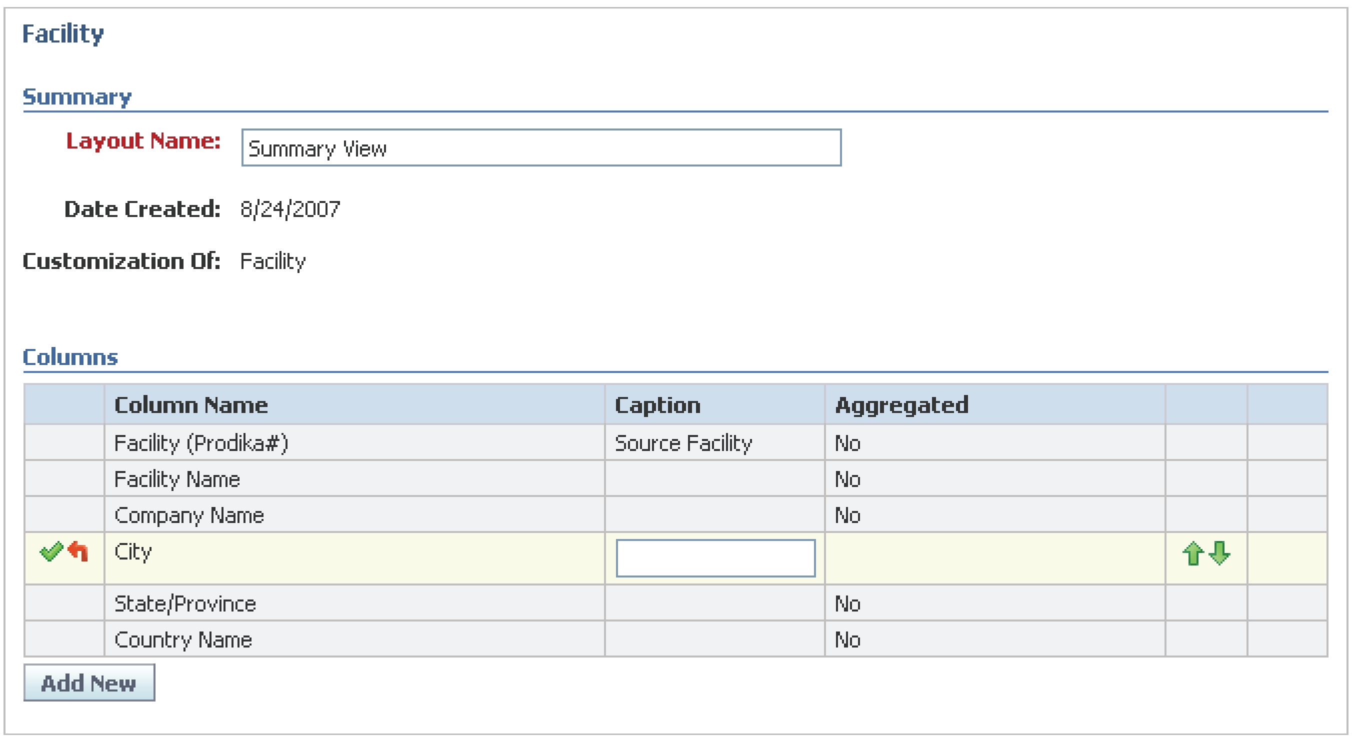
Modifying a Layout

You can modify only the user-defined report layouts.

To modify a custom layout:

1 In the User Customized Layouts page, click the linked field name of the layout that you want to modify. The Columns section displays all the columns that are in the current layout.
2 To edit a column, click the edit icon ( ) in the leftmost column next to the column name.
   - To customize the column name, provide a name in the **Caption** field, as figure 2-12 shows below.
   - To change the position of the columns, use the re-order row icons ( ).
3 To remove a column, click the edit icon ( ) in the leftmost column next to the column name. If the column is removable, the delete icon ( ) displays in the rightmost column. Clicking the delete icon ( ) removes the column from the layout.
4 Click **Save**.

Figure 2-12: Modifying a Layout page, Facility



To add new fields to a layout:

1 Click **Add New** at the bottom of the page. A dialog box displays all the fields that you can add to the layout.
2 Select one or more fields.
3 Click **Done**.
4 Click **Save**.

Using the Aggregated Feature

As seen above in figure 2-12, the Modifying a Layout page contains the Aggregated column. For some columns you can use the aggregated feature to combine multiple data results in a reporting cell separated by a comma “,”, semi-colon “;” or a new line. By default, the feature is set to “No”.

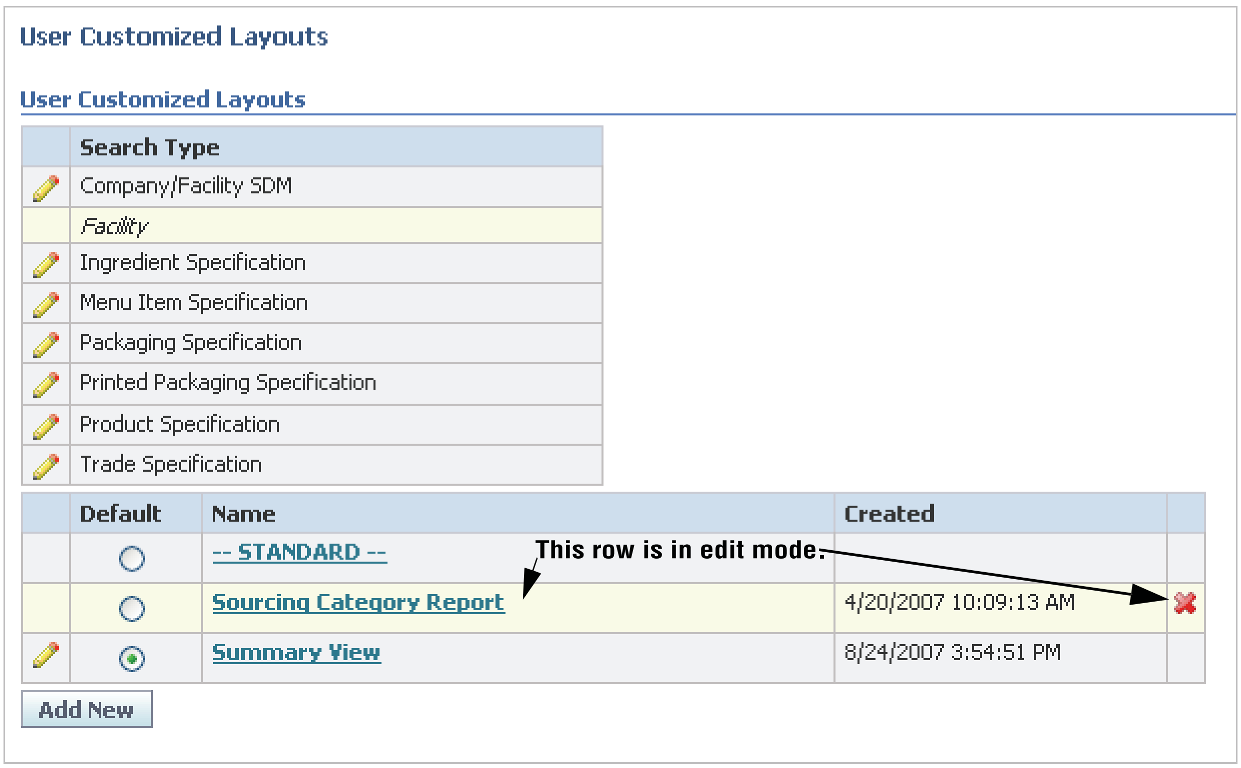
Deleting a Layout

You can delete only the user-defined report layouts.

To delete a layout:

1. Click **RPT > Ad Hoc Reports > Custom Layouts** from the left hand navigation panel. The User Customized Layouts page is displayed.
2. Select a business object. Custom layouts for the business object are displayed at the bottom of the page, as shown in figure 2-13 below.

Figure 2-13: User Customized Layout page



3. Click the edit icon ( ) in the leftmost column next to the layout you want to delete. A delete icon ( ) displays in the rightmost column. In figure 2-13 above, the Sourcing Category Report row is in edit mode.
4. Click the delete icon ( ) to delete the layout. The Reporting application displays a dialog box prompting you to confirm the deletion.
5. Click **OK** to delete the layout.