Agile Product Lifecycle Management for Process

Configuration Guide

Release 6.0.0.6

Part No. E29760-01

June 2012

ORACLE

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Agile Product Lifecycle Management for Process, Release 6.0.0.6

E29760-01

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DOCUMENT CONTROL

Change Record

Date	Author	Version	Change Reference
Sept-07	Agile/Oracle	1.0	Initial release of manual
Feb-08	Oracle	2.0	2nd release, Part No. E11041-01
Sept-09	Oracle	3.0	3rd release, Part No. E12397-01
Feb-10	Oracle	4.0	4th release, Part No. E12397-01
Sept-10	Oracle	5.0	5th release, Part No. E18540-01
Aug-11	Oracle	6.0	6th release, Part No. E24922-01
Dec-11	Oracle	7.0	7th release, Part No. E26493-01
Jan-12	Oracle	8.0	8th release, Part No. E26593-02
June-12	Oracle	9.0	9th release, Part No. E29760-01

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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.

Note To read the PDF files, you must use the free Adobe Reader™ version 7.0 or later. This program can be downloaded from the Adobe Web site: http://www.adobe.com/.

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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	Configuration Guide	Admin. User Guide	Release Notes	Agile training	Help Desk	Agile sales rep
Administering Agile Product Lifecycle Management for Process		●		●		
Cache management		●				
Configuring Agile PLM for Process	●					
Core data management		●				
Custom data management		●				
Feature requests					●	●
Installing Agile Product Lifecycle Management for Process				●		●
Known issues			●			
New in this release			●	●		●
Printing				●		
Resolved issues			●			
System-based roles		●				
Technical support					●	
User and user group management		●				

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

Configuring Agile Product Lifecycle Management for Process 6.0.0.6

This guide discusses basic configuration information regarding Agile Product Lifecycle Management for Process. Topics in this manual include:

- *Environment Variable Settings*
- *Environment Settings Configuration*
- *Customer Settings Configuration*
- *DexConfig*
- *Content Synchronization and Syndication Settings*

Overview

Using configuration files, you can limit or extend the behavior of your Agile Product Lifecycle Management (PLM) for Process installation. Further, installations need a certain level of configuration to describe the location of the database, the reporting services, and some topology information to allow smooth interoperability with other subsystems within the Agile PLM for Process suite.

Agile PLM for Process configuration files are text-based XML files. Configuration settings can stand alone, or they can be organized within a nested set of XML elements.

The configuration files are located at:

```
[X]: \%Prodika_Home%\Config
```

As of version 6.0, there are three subfolders and a few files under this location, as shown below.

```
[X]: \%Prodika_Home%\Config\Core
[X]: \%Prodika_Home%\Config\Custom
[X]: \%Prodika_Home%\Config\Extensions
[X]: \%Prodika_Home%\Config\environmentvariables.config
[X]: \%Prodika_Home%\Config\DeployedConfig.config
```

Note DeployedConfig.config can be thought of as the hub for configuration. When an application needs the system configuration, it generally links to this file, which, in turn, links to the configuration located in the subdirectories. Making changes to this file affects all applications, so care must be taken when editing this file.

The `\%Prodika_Home%\Config` directories are defined as follows.

Table 1-1: Directory definitions

Directory	Description
Core	This directory holds files that should not be modified as part of deployment. These system files have been encrypted as part of the installation to prevent accidental changes.
Custom	This directory holds the environment and feature configurations that can be modified.
Custom\Reference	This directory holds all of the core files that can be used as a reference when editing custom and extension files.
Extensions	This directory holds all of the files that can be modified to extend the behavior of the product suite. Refer to the *Agile Product Lifecycle Management for Process Extensibility Pack* for more information, or see *Extensions* on page A-11 for recently added extensions.

Commonly Edited Configuration Files

Several configuration files can be modified to affect application behavior or to model the application landscape, as listed in table 1-2 below.

Table 1-2: Commonly edited configuration files, described

Configuration File Name	File Location	Description
environmentvariables.config	%PRODIKA_HOME%\Config	A central repository for application configuration variables. This file handles configuration settings ranging from logical paths to connection settings to URL mappings. See *Environment Variable Settings* on page 1-3 for more information.
EnvironmentSettings.config	%PRODIKA_HOME%\Config\Custom	Allows for overriding variables defined in the environmentvariables.config file to accommodate the setup of more complex environments. See *Environment Settings Configuration* on page 1-7 for more information.
CustomerSettings.config	%PRODIKA_HOME%\Config\Custom	Defines variables specific to the implementation requirements and provides the ability to override specific application feature configuration settings. See *Customer Settings Configuration* on page 1-16 for more information.

Environment Variable Settings

Overview

The `environmentvariables` configuration file contains the aspects of the product suite configuration that are related to the topology of the product suite. It is located at: `\%Prodika_Home%\Config\environmentvariables.config`. Often customers deploy the product suite on multiple servers with each server hosting one or more applications from the product suite. You can specify the location of these applications and the port numbers of the various services in this configuration file.

A specified set of variables in this file are system specific, and the system cannot function as expected if they are missing. Additionally, you can add custom variables to this file for ease of re-use.

See table 1-3 on page 1-4 for the list of system-specific variables.

Environment Variable Configuration File Format

Table 1-3: Environment variable configuration settings, described

Configuration Setting	Description
Prodika.Server1.URL	This is a variable defined by the Installation Admin indicating the name of the server where the product suite is deployed. More Server settings can be added to the `environmentvariables` config (for example, Prodika.Server2.URL) as needed and referenced in the settings below.
Prodika.SCHEME	HTTP Scheme for the Web applications (can be `http` or `https`).
Prodika.AuthenticationBridgeServer.URL	In most installations, this will be the path to the Remoting Container. Inside the Remoting Container exists these two logical services. This allows all applications using this Remoting Container to "trust" each other. When a user logs into one app, they can navigate to another (possibly on another machine) without having to repeat that login process.
Prodika.AuthorizationBridgeServer.URL	
Prodika.AuthenticationCredentials.Domain	
Prodika.ReportServer.URL	Host address of the MS reporting Web Service.
Prodika.SupplierPortal.RefLib.URL	Obsolete. Do not use.
Prodika.DB.URL	This is the "SQL Connection String" that describes, among other things, where the database is located on the network. A more detailed description is available at http://msdn.microsoft.com/en-us/library/system.data.sqlclient.sqlconnection.connectionstring.aspx.
Prodika.ReportingDB.URL	This is the "SQL Connection String" that describes, among other things, where the database is located on the network for reporting. In simpler deployments, this is usually the same as the Prodika.DB.URL value.
Prodika.DWB.URL	Location of the DWB Web application.
Prodika.GSM.URL	Location of the GSM Web application.
Prodika.GSMInterApp.URL	Location of the GSM Web application for inter-application communication.
Prodika.GSMView.URL	Allows read-only view of specifications.
Prodika.SCRM.URL	Location of the SCRM Web application.
Prodika.NPD.URL	Location of the NPD Web application.
Prodika.Optimization.URL	Location of the Optimization Web application.
Prodika.Portal.URL	Location of the Portal Web application.
Prodika.PQS.URL	Location of the PQS Web application.
Prodika.REG.URL	Location of the Reg Web application.
Prodika.DRLAttachment.URL	Location of the DRL Web application that is deployed for file transfer.
Prodika.DRL.URL	Location of the DRL Web application.
Prodika.EQ.URL	Location of the EQ Web application.
Prodika.CSSPortal.URL	Location of the CSS Portal Web application.
Prodika.Reporting.URL	Location of the Reporting Web application.
Prodika.WFA.URL	Location of the Workflow Admin Web application.
Prodika.UGM.URL	Location of the User Group Management Web application.

Table 1-3: Environment variable configuration settings, described (continued)

Configuration Setting	Description
Prodika.Print.URL	Location of the Print application.
Prodika.SPA.URL	Location of the Supplier Portal Admin Web application.
Prodika.SupplierPortal.URL	Location of the Supplier Portal Web application (typically used for external vendors).
Prodika.WebDAV.URL	Location of the WebDAV virtual folder.
Prodika.ReportService.URL	This is the location of the MS reporting Web Service (typically an "asmx" extension). When an MS Reporting Server is installed using the default IIS location, it should only be necessary to alter the Prodika.ReportServer.URL value.
Prodika.PDFWorkArea.URL	The location that client browsers will use to navigate to NPD's PDF files.
Prodika.OfficeDocWorkArea.URL	This is the address of the WebDAV webserver installation used by NPD. Typically, IIS is configured on the same box as NPD to use WebDAV at a path of the implementer's choosing.
Prodika.PDFCommentRepository.URL	The PDF comment repository for NPD to be used by client browsers.
Prodika.OfficeDocWorkArea.UR	This is the address of the WebDAV webserver installation used by NPD. Typically, IIS is configured on the same box as NPD to use WebDAV at a path of the implementer's choosing.
Prodika.PDFWorkArea.UNC	Configuration of WebDAV necessitates the presence of a repository in the file system. This is the path of that repository.
Prodika.OfficeDocWorkArea.UNC	These are file paths pointing to places within the local filesystem where files should be stored. Generally, an implementer would only need to alter the "Prodika.PDFWorkArea.UNC" variable as these paths rely on it by default.
Prodika.PDFCommentRepository.UNC	It is the file location for NPD's PDF comments.
Prodika.SMTPSever.Address	The address of the email server that applications will use to send emails.
Prodika.EmailDomainFilters	In test environments, it is generally useful to avoid sending emails to certain domains. If an email is not addressed to one of these domains, it is not sent. This list is comma-delimited.
Prodika.From.EmailAddress	The address that the system will use in the "From" area of emails.
Prodika.To.EmailAddress	The address that the system will use in the "To" area of emails.
Prodika.From.Workflow.EmailAddress	The address in the "from" part of emails generated from a workflow request.
Prodika.DataExchangeService.Notifier.EmailAddress	The email address used when an import / export operation completes.
Prodika.AuthenticationBridge.Port	Port number for the authentication bridge.
Prodika.Reporting.Port	Port number for the Report Generation service.
Prodika.AuthorizationBridge.Port	Port number for the Authorization service.

Table 1-3: Environment variable configuration settings, described (continued)

Configuration Setting	Description
Prodika.TaxonomyDenormalization.Port	Port number for the Taxonomy Denormalization service.
Prodika.OLSDenormalization.Port	Port number for the Object Level Security Denormalization service.
Prodika.Syndication.Port	Port number for the Data Syndication service.
Prodika.DataImport.Port	Port number for the Data Exchange service.
Prodika.DRLRepositoryCleanup.Port	Port number for the DRL Repository Cleanup service. This service removes orphaned DRL attachments from the system.
Prodika.SmartIssue.Port	Port number for the Smart Issue service.
Prodika.DRLService.SysUser	User Id for the system user with access to the DRLService Web application.
Prodika.DRLService.SysPassword	Password for the system user for the DRL service.
Prodika.RemotingContainer.SysUser	User Id for the system user for the Remoting Container.
Prodika.RemotingContainer.SysPassword	Password for the system user for the Remoting Container.
Prodika.Print.BIPublisherIntegration.EndPoint	For BI Publisher settings, see the *Agile Product Lifecycle Management for Process Install/Upgrade Guide.*
Prodika.Print.BIPublisherIntegration.UserName	
Prodika.Print.BIPublisherIntegration.Password	
Prodika.ReportService.SysUser	Holds the credentials for MS SQL Reporting Services.
Prodika.ReportService.SysPassword	
Prodika.RemotingContainer.LogFilePath	This variable points to the remoting container's log file path. The user that the remoting container is configured to run as must have permissions to this path.

In a load-balanced environment, domain and subdomain of the URL will be the externally facing domain and subdomain respectively.

As described above, you can add custom variables in the beginning of the `environmentvariables.config` file and can then reference them in the settings that follow it. A default variable called Prodika.Server1.URL is available in the configuration file. This can be expanded upon by introducing Prodika.Server2.URL and so on depending on the number of servers in the deployment landscape. The custom variables can then be consumed by system-specific variables that follow (for example, Prodika.DRL.URL).

Further, the custom variables introduced can reference other Windows environment variables. This provides a way for some settings—such as passwords and usernames and possibly database connection strings—to be available to be viewed by only an administrator or a highly privileged user.

Environment Settings Configuration

Overview

The `EnvironmentSettings` configuration file contains those aspects of the product suite's configuration that are related to the environment. It is located at: `\%Prodika_Home%\Config\Custom`.

The `environmentvariables.config` file is configuration of both an environment and an app feature perspective and was introduced as a convenience measure. `EnvironmentSettings.config` focuses mainly on environmental configuration.

As opposed to the `CustomerSettings.config` file, the `EnvironmentSettings.config` will be the same for a specific version of the software on a set of servers in one specific environment (for example, Production). The `CustomerSettings.config`, however, would almost always be the same for a specific version of the software across all environments of that version (for example, production, QA, development, and so on).

It is possible that there could be some circumstances that could necessitate different settings across servers that could impact these assumptions.

Configuration File Format

The elements in the file are outlined below, with details following in a table.

Core

Used By: All applications

AppURLs

This section has been relocated to the `environmentvariables.config` file. See *Environment Variable Settings* on page 1-3.

AppSettings

This key indicates the location of HomeURL (portal) and the SiteMap (do not modify) of the Agile installation.

FormsAuthenticationHelper

This configuration node contains two elements: SingleSignOn and Portal.

The SingleSignOn element can be enabled for systems using a Single Sign On (SSO) solution that conforms to the Agile SSO interface.

```
<SingleSignOn xmlMergeKey="SingleSignOn"
paramName="externalid"
columnName="username"
enabled="true" />
```

Enable this setting by setting `enabled` to "true."

For systems using an LDAP solution, this SSO setting is not appropriate. The "AuthenticationStrategy," which is described later on, is used for enabling LDAP-based authentication.

Table 1-4: FormsAuthenticationHelper: key names, expected values, and descriptions

Key Name	Expected Value	Description
paramName	Name of header key	The header key set by the SSO solution once it authenticates the user in the incoming request.
columnName	Name of the column in the user table	The name of the column in the Users table that contains the value to be compared to the value of the header key in the Request.
enabled	true / false	Indicates if SSO is enabled.

Portal

If SSO is not used but Agile or if LDAP authentication is used, this element indicates the location of the Agile portal for the authentication to be centralized. The attribute loginUrl is used to indicate the location of the Agile portal application. If the portal is enabled, applications redirect to the loginUrl for authentication. Enabling the portal is covered in the `CustomerSettings.config` file.

Prodika / Services

This element configures the services used by Agile. Many Agile services rely on their environment to enable certain behavior.

Table 1-5: Prodika services: key names and descriptions, by service name

Service name	Key Name	Description
AuthenticationService	UseTrustBridge	Specifies if the Authentication Service needs to use the trust bridge, which is hosted in the Remoting Container. It is generally set to true unless only one application is used. Setting this to "false" may deteriorate usability, as many logical use cases are implemented with a combination of multiple applications.
	AuthenticationStrategy	Agile allows a set of Authentication Strategies. They are `id="LDAP"`, `id="Prodika"` or `id="ProdikaAndLdap"`. Setting the id to "Prodika" uses the Prodika User Management System to authenticate the users. Setting id to "LDAP" forces the use of an LDAP system specified by the `ldapServer` attribute. If the "ProdikaAndLdap" option is picked, another option, "allMustPass," may also be set to "true" or "false." This defines whether the user's credentials must be accepted by all strategies (Prodika and LDAP) or by just one.
AuthenticationBridgeService	REMOTE_URL	Specifies the location of the AuthenticationBridgeService.
EANnetEmailService	EMAIL_DOMAIN_FILTER	Specifies the domains to which emails can be sent. Used for security and privacy purposes so that a user cannot mistakenly send an email to an insecure domain name. Typically is left blank in a production environment but is specified in QA or Maintenance environments, to prevent emailing to outside parties.
	BCC_AUDIT_EMAIL_ADDRESS	Specifies an email address to which every email sent out by the system is BCC-ed for auditing purposes. May be left blank.
	SMTP_SERVER	Location of the SMTP server that the system will use for sending emails.

Table 1-5: Prodika services: key names and descriptions, by service name (continued)

EmailService	EMAIL_DOMAIN_FILTER	Specifies the domains to which emails can be sent. Used for security and privacy purposes so that a user cannot mistakenly send an email to an insecure domain name. Typically is left blank in a production environment but is specified in QA or maintenance environments, to prevent emailing to outside parties.
	BCC_AUDIT_EMAIL_ADDRESS	Specifies an email address to which every email sent out by the system is BCC-ed for auditing purposes. May be left blank.
	SMTP_SERVER	Location of the SMTP server that the system will use for sending emails.
SyndicationService	ErrorNotifyFromAddress	The FROM address used for error notification.
	ErrorNotifyToAddress	The TO address used to send the error notification.
AuthorizationTokenManagementService	AuthorizationBridgeUrl	Location of the `AuthorizationBridge` service. Could be any unique location that is accessible by the RemotingContainer.
DataExchangeService	DexConfiguration	Specifies the configuration of the DataExchangeServer. See *Customer Settings Configuration* on page 1-16.
ReportProcessingService	MAX_REPORT_GENERATOR_THREADS	Maximum number of threads for report generation.
	SLEEP_INTERVAL_IN_SECONDS	Sleep interval for polling.
	SQL_TIMEOUT_IN_SECONDS	SQL command timeout.
	EXPIRATION_IN_DAYS	Expiration of report request.
	GRACE_PERIOD_IN_DAYS	Grace period after report expiration.

Prodika / ConnectionPools

This element specifies the Prodika and Reporting Connection pools to be used by the applications. The key-value pairs are specified in table table 1-6, below.

Table 1-6: Prodika connection pools

Key Name	Required	Expected Value	Description
MAX	Yes	> 49	Depending on the scenario and the number of services active at any point, the connection pool size can vary. A number greater than 49 is considered safe, but this value will depend on utilization patterns.
CONNECT_STRING	Yes	(format is data provider specific)	This entry specifies the location of the database and its credentials. The appropriate connection string should be defined and provided by a database administrator.

The above settings are for the Agile database. The `ReportDB` element, which is a copy of the ProdikaDB element, specifies the connection pool properties for the reporting application. Specifying it separately allows reporting to be run on a copy of the Agile main database to avoid performance degradation of the main application.

Prodika / Managers / EnvironmentManager

The **`<Managers>`** element contains definitions and configurations for the Agile platform.

The following table summarizes the various settings in this node. The `EnvironmentManager` node is detailed in table 1-7 below.

Table 1-7: EnvironmentManager node: key names and descriptions

Key Name	Description
GSM_ATTACHMENT_PATH	Location of the attachments folder used by the GSM application. {to be deprecated in a future release}.
XDOCUMENTS_HOME	Location of the XDocuments folder used by most applications.
LIMSIntegrationPath	Accessed from a GSM nutrient profile when the `GSM.Integration.LIMS.Enabled` configuration is enabled, this is the path that the system uses to get nutrient information.
PDFWorkArea	When using WebDAV for document collaboration in NPD, set this as the area exposed for WebDAV for PDFs. This value requires a trailing '\' or '/'.
PDFCommentRepository	When using WebDAV for document collaboration in NPD, set this as the location for WebDAV PDF comments.
OfficeDocWorkArea	When using WebDAV, set this as the location for Microsoft Office Documents. This value requires a trailing '\' or '/'.
PDFWorkAreaUNC	The physical location that the WebDAV virtual folder (above) maps to. This value requires a trailing '\' or '/'.
OfficeDocWorkAreaUNC	The physical location that the WebDAV `OfficeDocWorkArea` virtual directory maps to. This value requires a trailing '\' or '/'.
PDFCommentRepositoryUNC	The physical location that the WebDAV `PDFComments` virtual directory maps to. This value requires a trailing '\' or '/'.
PasswordExpiration	The number of days for user passwords to expire. This setting is only picked up if password expiration is enabled in the customer settings.

ProdikaSettings

The ProdikaSettings element extends the Prodika element with some additional settings.

ProdikaSettings / Attachments

Table 1-8: ProdikaSettings / Attachments: key names, expected values, and descriptions

Key Name	Expected Value	Description
UNC	Location of folder	Deprecated
company	Location of folder	Deprecated
facility	Location of folder	Deprecated
sac	Location of folder	Deprecated

WebCommon

Table 1-9: WebCommon: key names and descriptions

Key Name	Description
ActionMenuImageOnClickJScript	Location of the Agile portal for forwarding application on certain JavaScript calls in the application. The URL to the Agile portal should be modified, but nothing else should typically be changed.
LogoutEnabled	Do not modify without consulting Agile. This value should typically be set to False.
NotificationPlugin	Accepts an URL in object-loader syntax that can be used to notify users at specific events.

SideNav

This specifies the location of the Agile portal to forward the application to when a user clicks the Agile icon on the left navigation panel of any application. It also specifies the images to be used for the link back to the portal, as well as the site map.

Application Settings

This section describes the various configuration keys utilized by the Agile application. Table 1-10 below briefly denotes the location of the configuration key, then follows it with the description.

Table 1-10: Application settings, keynames and descriptions, by category

Key Name	Description
DRL / DRLSettings	
	See *Environment Variable Settings* on page 1-3.
EQ / EQParams	
EQUrl	Location of the Supplier Portal application. This URL is used in constructing emails to suppliers when an eQuestionnaire (eQ) is submitted. *Environment Variable Settings* on page 1-3.
EQQueryParam	Parameter used to specify the eQ in the URL. This should not be changed without prior consultation.
EMAIL_FROM_ADDRESS	The email address used to specify the FROM line of the email sent to a supplier from eQ.
EQ / EQSettings	
GSMApplicationPath	Location of the GSM application. See *Environment Variable Settings* on page 1-3.
HomeURL	Location of the Agile portal. See *Environment Variable Settings* on page 1-3.
SiteMapURL	Do not modify.
GSM / Xeno.Data.GSMWeb.MiscSettings	
WorkflowUserPopupURL	System – do not modify.
ActionMenuImageOnClickJScript	JavaScript to point to portal. Do not modify this value. Instead, directly change the value of VAR:Prodika.Portal.URL. See *Environment Variable Settings* on page 1-3.
PLM/AppSettings/add	
LogDirectory	Value can be changed to a custom directory, but this setting would typically not require modification.
InstrumentationLogFile	Uncomment the line to add instrumentation. If the `InstrumentationLogFile` is not set, no instrumentation logging will take place. The value indicates the file name to use.
NPD / AppSettings	
WorkflowEmailAddress	The FROM address in workflow emails sent by NPD.
ProdikaReporting / AppSettings	
AdditionalReport.GroupLocation	URL to the Customized Reporting groups. See *Environment Variable Settings* on page 1-3.
ProdikaReporting / ReportConfig / ServiceConfig / AuthenticationCredentials	
username	User name for the MS SQL Reporting Server that can execute reports uploaded into the Reporting Server.
password	Password for the user specified above.
domain	Domain name for the user specified above (empty if the account is not a domain account).
ProdikaReporting / ReportConfig / ServiceConfig / ReportingService	
serviceLocation	Location of the MS SQL Reporting Service Web service.

Table 1-10: Application settings, keynames and descriptions, by category (continued)

Reg / AppSettings	
ExtendedAttributes.Calculated.Scripting.HelpURL	If Calculated Extended Attributes help content is available, specify the URL to the help documentation.
SCRM/Xeno.Data.SCRMWeb.MiscSettings	
ActionMenuImageOnClickJScript	Location of the Agile portal to be available to SCRM JavaScript. . Should not be modified here. Modification is controlled by changing the environment variable VAR:Prodika.Portal.URL See *Environment Variable Settings* on page 1-3.
SupplierPortalAdmin	
HomeURL	Location of the Agile portal.
SiteMapURL	# - do not modify.
SupplierPortal	
HomeURL	Location of the Agile portal.
SiteMapURL	# - do not modify.
RefLibURL	Document Reference Library URL. Specify the URL to the Document Reference Library.
WFA/AppSettings	
AllowCreate	Specifies if workflows can be created in this environment. For example, in a live production system, workflow creation should be disabled, but it should be enabled in a preproduction system. This functionality is also dependent on how DataExchangeServer is configured. See *Customer Settings Configuration* on page 1-16.
AllowEdit	Specifies if workflows can be edited in this environment. This functionality is also dependent on how DataExchangeServer is configured. See *Customer Settings Configuration* on page 1-16.
AllowCopy	Specifies if workflows can be cloned in this environment. This functionality is also dependent on how DataExchangeServer is configured. See *Customer Settings Configuration* on page 1-16.
AllowImport	Specifies if workflows can be imported into this environment. In live production systems, workflows are typically imported from a preproduction environment. This functionality is also dependent on how DataExchangeServer is configured. See *Customer Settings Configuration* on page 1-16.
PMA/AppSettings	
AllowUserCreate	Specifies if users can be created in this environment. In a live production system, users might be not created, whereas in a preproduction environment, they might be. This functionality is also dependent on how DataExchangeServer is configured. See *Customer Settings Configuration* on page 1-16.
AllowUserEdit	Specifies if a user can be edited in this environment. This functionality is also dependent on how DataExchangeServer is configured. See *Customer Settings Configuration* on page 1-16.
AllowUserImport	Specifies if a user can be imported into this environment. This functionality is also dependent on how DataExchangeServer is configured. See *Customer Settings Configuration* on page 1-16.
AllowUserExport	Specifies if a user can be exported from this environment. This functionality is also dependent on how DataExchangeServer is configured. See *Customer Settings Configuration* on page 1-16.

Table 1-10: Application settings, keynames and descriptions, by category (continued)

AllowGroupCreate	Specifies if a group can be created in this environment. This functionality is also dependent on how DataExchangeServer is configured. See *Customer Settings Configuration* on page 1-16.
AllowGroupEdit	Specifies if a group can be edited in this environment. This functionality is also dependent on how DataExchangeServer is configured. See *Customer Settings Configuration* on page 1-16.
AllowGroupImport	Specifies if a group can be imported into this environment. This functionality is also dependent on how DataExchangeServer is configured. See *Customer Settings Configuration* on page 1-16.
AllowGroupExport	Specifies if a group can be exported from this environment. This functionality is also dependent on how DataExchangeServer is configured. See *Customer Settings Configuration* on page 1-16.

RemotingContainer Section

Table 1-11: Remoting Container/config info

Key name	Description
UserID	The credentials the Remoting Container will run as in the Prodika system. See *Environment Variable Settings* on page 1-3 for more information.
Password	

Table 1-12: Remoting Container Remote Services

Service name	Description
AuthenticationBridgeService	Needed for Single Sign On
ReportProcessingService	Needed for report generation
AuthorizationBridgeService	Required for DRL file authorization access check
TaxonomyDenormService	Required for taxonomy denormalization for search
OLSDenormService	Required for Object Level Security service
SmartIssue Service	Required for smart issue requests
SyndicationService	Required for data syndication
DataImportProcessor	Required for processing Data Exchange Requests
DRL Repository Cleanup	This service periodically cleans unused documents from the system

The IsActive flag needs to be set on the services for them to be active.

Most of these values are controlled by environment variables. (See *Environment Variable Settings* on page 1-3). Each of the services (RemotingContainer/RemoteServices/Service) can be turned on or off by setting the isActive attribute to "true" or "false."

Customer Settings Configuration

Overview

The Customer Settings configuration file contains customer-specific and core system configuration parameters.

The file is located at:

```
[X]: \%Prodika_Home%\Config\Custom\CustomerSettings.config
```

This file is typically edited in conjunction with `EnvironmentSettings.config`.

Configuration File Format

The elements in the file are outlined below with details following in tables.

Core

Used By: All applications

FormsAuthenticationHelper

This configuration node is used to augment the configuration parameters in the `EnvironmentSettings.config` Core/FormsAuthenticationHelper node.

SingleSignOn

The attribute accessDeniedURL is used to specify the URL to the system "access denied" message page. This should not be changed.

Portal

The attribute enabled is used to specify whether or not the Agile portal is enabled for site login and navigation.

Prodika / Services

This element is part of the configuration pipeline for the services used by Agile. In the Customer Settings file it is used to override or extend service configuration parameters.

Table 1-13: Prodika / services: key name and description, by service name

Service name	Key Name	Description
ExtendedAttributeSectionBuilderService	MaximumNumberOfRowsThroughCopy	Specifies the allowable number of rows that can be copied in the Extended Attribute Template Editor (in the Data Admin Application).
TaxonomyService	NamespaceAliasMappings	Additions to this will cause a taxonomy lookup given a name matching the namespace ID to instead use the taxonomy defined by the alias. This is commonly used when one spec type needs to use another's Category taxonomy. The format of the child nodes is: <AliasMapping isEnabled="true" namespaceID="x" alias="y"/ >
SQLReportingService	refscope="Session"	This is a system value. Do not alter this value.
	factory="Class:Xeno.Reporting.Service.ReportGenerationService.SQLServerReportGenerationServiceFactory, ReportingService"	This is a system value. Do not alter this value.
ExtendedAttributeSectionInstanceService	refscope="Session"	See *ExtendedAttributeSectionInstanceService Details* below for a description of this service.
	factory="Class:Xeno.Prodika.ExtendedAttributeSections.Service.ExtendedAttributeSectionInstanceServiceFactory, ProdikaLib">	
ExtendedAttributeSectionInstanceServiceClassScoped	refscope="Class"	See *ExtendedAttributeSectionInstanceService Details* below for a description of this service.
	factory="Class:Xeno.Prodika.ExtendedAttributeSections.Service.ExtendedAttributeSectionInstanceServiceFactory, ProdikaLib"	

ExtendedAttributeSectionInstanceService Details

Custom Sections have an "edit all" ability allowing users to put the entire grid in edit mode versus editing row by row. Because of performance implications, a configuration is available to control when this ability is available on a custom section. The configuration is based on the number of cells in the custom section. The default cell count is 150 cells, once the section exceeds 150 cells (including the header cells) the Edit All icon will not be available for that section. To override the 150 cell count, the following configurations need to be added and value adjusted:

```
<ExtendedAttributeSectionInstanceService refscope="Session"
factory="Class:Xeno.Prodika.ExtendedAttributeSections.Service
.ExtendedAttributeSectionInstanceServiceFactory,ProdikaLib">

    <envvar name="EditEntireSectionMaxCellCount" value="150" /
    >
</ExtendedAttributeSectionInstanceService>

<ExtendedAttributeSectionInstanceServiceClassScoped
refscope="Class"
factory="Class:Xeno.Prodika.ExtendedAttributeSections.Service
.ExtendedAttributeSectionInstanceServiceFactory,ProdikaLib">

    <envvar name="EditEntireSectionMaxCellCount" value="150" /
    >
</ExtendedAttributeSectionInstanceServiceClassScoped>
```

Note You may experience slower edit all performance if your custom sections contain a majority of qualitative drop downs with a large number of options.

Prodika / Managers

The **<Managers>** element contains definitions and configurations for the Agile platform.

The following table summarizes the various sections and settings in this node.

Table 1-14: Prodika / Managers: key name and description, by manager name

Manager name	Key Name	Description
TranslationManager	CUSTOMER_CONTEXT	Used to specify a Customer Context (Name) that corresponds to a Customer Proprietary Translation Override table in the underlying application database. This typically should not be changed.
EnvironmentManager	MinPasswordSize	The minimum password length (used during UGM user validation).
EnvironmentManager	MaxPasswordSize	The maximum password length (used during UGM user validation).

ProdikaSettings / SingleSignOn

The key PasswordChangeEnabled allows the user to change their Agile password under User Preferences when set to “true.”

Extended Attributes

DynamicScriptMethods

This is an extensibility point by which you can extend the behavior of calculated extended attributes and what they can resolve to.

The key denotes a unique namespace for a Dynamic Script Method. Custom implementations need to implement the Xeno.Prodika.ExtendedAttributes.Calculation.IDynamicScriptMethod interface. The full Object URL to that implementation should be specified as the value.

For example:

```
<add key="Mock"
value="Class:Xeno.Prodika.ExtendedAttributes.Calculation.MockDynam
icScriptMethod,ProdikaLib"/>
```

GSM

GSMConfig

This section contains core settings for the GSM application as key-value pairs.

Table 1-15: GSMConfig: key names, described

Key Name	Description
DisplayNutrientItemServingSize	Do not modify
DisableComplianceRollupSpecTypeList	Do not modify
InactiveSpecTypes	Do not modify
Allow3rdPartyControlledCopy	Do not modify

GSMSettings

Table 1-16: GSMSettings: key names, described

Key Name	Description
RoundingRulesProcessor	System – do not modify.
DisplayFormulaComparison	true – do not modify.
AddHTCBehaviorToContextHelp	Set to "true" or "false" based on the behavior that needs to be added.
StepPath	Controls which BOM calculation method to use as the default. The default setting is Input Quantity.
GSM.<SpecTypeName>. SpecSummary.ShortName.MaxLength	Specify the max Short Name length for a given Specification Type where **<SpecTypeName>** can be one of the following values: • TradeUnitSpec • ProcessSheetSpec • MenuItemSpec • NutrientProfile • ProductSpec • IngredientSpec • PackagingSpec • EquipmentSpec • FinishedPackagingSpec (Printed packaging spec) • DeliveredPackingSpec • PackingConfigSpec • LabelingSpec • MasterSpec • FormulationSpec **Note** Care must be taken that the ShortName is not larger than the actual database column in which it needs to be persisted.
GSM.ProcessSheetSpec.DefaultUOM.ISOCode	Specifies the default UOM for process specifications.
GSM.FormulationSpec.DefaultCurrency.ISOCode	Specifies the default currency for formulation specifications.
GSM.Formulation.QuickEntry.IngredientSpec.SearchView	This is the view path used by the Quick Search feature specified in Object Loader Entity Query Tool (EQT) View syntax.
GSM.Formulation.QuickEntry.IngredientSpec.SearchField	This is the field to search over used by the Quick Search feature. The default is the specification name. The search field can be changed from the default "SpecName" to "SpecNumber" or "SystemEquivalent".

Table 1-16: GSMSettings: key names, described (continued)

GSM.Formulation.QuickEntry.IngredientSpec.SearchOperator	This is the strategy that defines a match used by the Quick Search feature. The default is "Starts-With" meaning that if a candidate starts with what is currently typed, it is a match. The operator can be changed from the default "SW" (starts with) to "EQ" (equals) or "CN" (contains).
GSM.Formulation.QuickEntry.IngredientSpec.MinSearchStringSize	In the Quick Search feature, this is the minimum number of characters that provokes a search.
GSM.Formulation.QuickEntry.IngredientSpec.MaxResults	In the Quick Search feature, this is the maximum number of results.
GSM.Formulation.QuickEntry.Results.Height	These define the dimensions of the Quick Search popup.
GSM.Formulation.QuickEntry.Results.Width	
GSM.Attachment.External.URL	The URL pointing to the outside of system to retrieve the attachment.
GSM.Attachment.External.UserToken	The security token required to access the attachment outside of the system.
GSM.Optimization.ApproxYieldFixedDefault	Determines if approximate yield is fixed or variable when optimization session is created.

Xeno.Data.GSMWeb.MiscSettings

Table 1-17: Xeno.Data.GSMWeb.MiscSettings: key names, described

Key Name	Description
WorkflowUserPopupURL	This should not be modified.
WorkflowUserPopupWindowParams	This should not be modified.
MasterSpecAppliesToSpecTypes	A comma-delimited list of specification type identifiers to which master specifications can be applied. This typically should not be changed.

ProdikaSettings / ConceptAwareSpecs

This key-value list is used to enable or disable the Concept feature for specification types. The key is a specification type identifier, and the value is either "true" or "false".

GSMLibConfig / RequiredPropertiesForValidSpecs / Validator

Caution! This is a system setting – do not modify.

GSMLibConfig / TestingProtocolAPConfig

Table 1-18: GSMLibConfig / TestingProtocolAPConfig: key names, described

Key Name	Description
MinScore	The allowed system wide minimum score for testing protocol criteria
MaxScore	The allowed system wide maximum score for testing protocol criteria

AssociatedSpecsConfiguration

This configuration section specifies the Entity Query Tool (EQT) search views to be used when searching to add associated specifications in GSM. The Key attribute is a GSM specification type identifier that refers to the specification to which associated specifications are being added. The Value specifies the EQT Search View to use for that specification type.

For example:

```
<add key="1004" value="SearchableView:Config:ProdikaSettings/
SearchableMultiSelectViews,IngredientSpecAssociatedSpecView" />
```

Caution! This is a system setting – do not modify.

NPD

AppSettings

This section contains core settings for the NPD application as key-value pairs.

Table 1-19: AppSettings: key names, described

Key Name	Description
ReadAccessDeniedHtml	System – do not modify
FinancialAccessDeniedHtml	System – do not modify
PortfolioConcurrentLoadLimit	Can be lowered if concurrent testing of NPD project portfolios results in a performance issue in your topology
PortfolioSizeLimitWithSecurity	Limits the number of portfolio returns for roles for which security is checked, to protect application server performance
PortfolioSizeLimitNoSecurity	Limits the number of portfolio returns for roles for which security is NOT checked, to protect application server performance
ISPSupport	Off – do not modify {To be deprecated in a future release}
IdeaSupport	On – do not modify (This is the supported ISP)
PackageCopySupport	Off – do not modify
POPSupport	On – do not modify
ConsumerTechMatrixSupport	Off – do not modify

Table 1-19: AppSettings: key names, described (continued)

ViewPrivateTemplateSupport	Off – do not modify
DefaultStageMaster	System – do not modify
CommonCurrencyISOCode	System – do not modify
DefaultStageSecondReviewAccelerationFactorPercentage	Changes the default review acceleration percentage

Analytics

This section contains a series of Analytic nodes that define custom analytics for NPD. The Analytic nodes are defined below. Using analytics requires third-party charting software.

Table 1-20: Analytics for NPD: attribute/element names, described

Attribute / Element Name	Description
id	A unique identifier for the Analytic.
chartType	Specifies the type of analytic chart to render. Valid options include "BarChart" and "PieChart."
title	Specifies the unique title for the Analytic. This can correspond to a custom translation, which will be rendered on the chart if available.
aggregationField	Specifies the scope of aggregation for the metric. Valid values include "Stage," "Project," and "ProjectType."

Each Analytic node contains a ProjectMetrics node. The ProjectMetrics node contains one or more ProjectMetric children. A ProjectMetric has one attribute, projectMetricId. The projectMetricId attribute specifies the NPD Metric identifier that the analytic corresponds to.

For example:

```
<Analytic id="DiPie" chartType="PieChart"
title="lblDiByProjectType" aggregationField="ProjectType">
<ProjectMetrics>
<ProjectMetric projectMetricId="FY1_DI" />
</ProjectMetrics>
</Analytic>
```

ActivityTypeOptions

This section should not be modified.

ActivityTypeUIMapper

This section is used to relate specific NPD activity types to corresponding user interface controls. It should not be modified.

PQS

AppSettings

This section contains core settings for the PQS application as key-value pairs.

The formula comparison limit can be modified to an appropriate value. Do not modify without consulting the services team.

Table 1-21: PQS AppSettings: key names, described

Key Name	Description
UniversalTestingProtocols	When set to "true," allows scorecards to be created on any testing protocol in the system regardless of the specification associated with the scorecard
AllowScorecardToggle	When set to "true," allows the scorecard view to be toggled between an admin and non-admin view
ReportingPopupFilteredDataSource_PQSScorecardQualificationType	Should not be modified
ReportingPopupFilteredDataSource_PQSScorecardTypesMS	Should not be modified
ConfiguredRatingStategyResolver	Should not be modified
NonPQSAdminQualificationLookupFilter	Should not be modified

Reg

FormulaComparisonLimit

This is the maximum number of formulas that may be compared at one time.

SCRM

SCRMConfig

This section contains core settings for the SCRM application as key-value pairs.

Table 1-22: SCRMConfig: key names, described

Key Name	Description
ShowLegalAgreements	Off – do not modify.
SupplierDocumentManagmentEnabled	On – do not modify without consulting services.
FacilitySupplierDocumentManagmentEnabled	On – do not modify.
ReferencesTabEnabled	Enables or disables the SCRM references tab.
HidePublishToSupplierPortal	Specifies whether or not the Publish To Supplier Portal field is available within SCRM.
HideHRLAccessLinkOnReferencesTab	Deprecated.

Table 1-22: SCRMConfig: key names, described (continued)

EmailSupplierRep	The FROM email address for emails generated to suppliers from SCRM.
SIQDefaultDaysUntilDue	Default value for the supplier initiated due date field on a sourcing approval. This is the number of days after a questionnaire is initiated by a supplier that the questionnaire is due.
SIQDefaultDaysUntilAmber	Default value for the supplier initiated amber date field on a sourcing approval. This is the number of days after a questionnaire is initiated by a supplier that it reaches amber.
SIQDefaultDaysUntilSupportingDocDue	Default value for the supplier initiated supporting document due date field on a sourcing approval. This is the number of days after a questionnaire is initiated by a supplier that the supporting documents are due.

Xeno.Data.SCRMWeb.MiscSettings

Do not modify these SCRM settings.

Security

Workflow statuses that the SCRM Security feature applies.

```
<Security>
<BusinessUnit>
<SecuredStatuses>
<add key="Keystone" value="5023D2673CE6-AFBF-4F5A-AE28-
23554E92FB4A"/>
<add key="Probationary" value="50237FE9AA31-5C3F-466C-
BB6B-36404D4C99F9"/>
<add key="Not Approved" value="50233D867CC5-1D96-4E9F-
B9B4-B4F2200B8B60"/>
<add key="Provisional" value="50232CDB623E-77F3-4D17-947F-
7596CFBB650D"/>
<add key="Discontinued" value="502311140CC8-24BD-4EA9-
9611-8B69BAF86BA7"/>
<add key="Approved" value="5023D7911401-E476-4541-AB72-
682C76DE560E"/>
<add key="Not Specified" value="502300000000-0000-0000-
0000-000000000000"/>
<add key="Null" value="000000000000-0000-0000-0000-
000000000000"/>
</SecuredStatuses>
</BusinessUnit>
</Security>
```

Note Existing customers should check the pkids and NOT overwrite those values; new customers should change their database to have these pkids.

Supplier Portal

SupplierPortalConfig

This section contains core settings for the Supplier Portal application as key-value pairs.

Table 1-23: SupplierPortalConfig: key names, described

Key Name	Description
EmailFromAddress	The FROM email address for emails generated to suppliers from Supplier Portal.
BUFacilitySearchPattern	Specifies the Business Unit filter for SCRM supplier searches. Should be modified to represent a node in the SCRM business unit category.
HRLEnabled	This should not be modified.
DRLEnabled	Enables or disables usage of the Document Reference Library from within Supplier Portal.
AddNewContactsEnabled	Enables external providers to add new contacts to the Supplier Portal.
EditContactsEnabled	Enables external providers to maintain contacts in the Supplier Portal.
RemoveContactsEnabled	Enables external providers to remove contacts from the Supplier Portal.

WFA

AppSettings

This section contains core settings for the WFA application as key-value pairs.

Table 1-24: WFA AppSettings: key names, described

Key Name	Description
MaxSearchCriteriaCount	This should not be modified
TemplateSummaryControl	This should not be modified
AllowEasyNewWorkflowStatusCreation	This should be set to “false” and not modified
AllowExplicitNewWorkflowStatusCreation	This should be set to “true” and not modified

EQTWorkflowMappingConfig

This section specifies the workflow process types that are available from the main search screen in the Workflow Admin Tool (WFA). These values should not be modified.

PMA (UGM)

AppSettings

This section contains core settings for the UGM application.

Table 1-25: PMA (UGM) AppSettings: key names, described

Key Name	Description
BUAdministrator	The user that can administer all business units regardless of those that exist in their delegatable business unit list. This option is beneficial when setting up UGM Admin security for the first time.
UserGroupManager	The user that can add or remove multiple users to a group from Group page in UGM.

SuiteApplications

The SuiteApplication values are system defaults and should not be modified.

Workflow

LinearWorkflowResolverConfig / TransientWorkflowPKIDs

This section specifies the system identifier for the default ("Transient") workflow state. This setting should not be modified.

SupplierConfig

The SupplierConfig values should not be modified.

FeatureConfig

The FeatureConfig defines the available, configurable applications features that are enabled in the application instance. See *Feature Configurations and Extensions* on page A-1 for a listing of feature configurations. The FeatureConfig section can be used in two ways, as explained below.

First, it can be modified to specify a particular Feature Configuration pipeline, which is a predefined feature configuration for a particular industry or customer. This is done using the configExtends attribute of the **<FeatureConfig>** element.

For example, to enable the out-of-the-box settings for a consumer packaged goods application feature set, specify the following **<FeatureConfig>** element with the configExtends attribute:

```
<FeatureConfig
configExtends="file:%CONFIG_HOME%\CPGFeatureConfig.config,
FeatureConfig">
```

Second, the **<FeatureConfig>** section can be used to override **<FeatureConfig>** settings that are enabled or disabled earlier in the configuration pipeline. To do this, you must identify the key for the desired **<FeatureConfig>** setting and then add a key-value node inside the **<FeatureConfig>** section that specifies its value as either "true" or "false."

For example, to enable the component catalog (FIC) – GSM integration feature, add the following element to the **<FeatureConfig>** section:

```
<add key="REG.FIC.Integration.GSM.Enabled" value="true"/>
```

Integration/Prodika/Services/UserService

The Integration/Prodika/Services/UserService exposes the `CacheTimeout.UserContext.Minutes` configration which determines how long a given user's session should stay on the server after the user last uses it. Setting this lower saves system resources, while setting it higher allows a user to be inactive longer.

ExtendedAttributesSettings

This is an extensibility point by which you can specify the location of Extended Attribute Syndication Overrides in the configuration pipeline. By default there are no overrides to this.

The configExtends value specifies a file location and XPath query to the custom configuration data. Under `CustomerNutrientItems/NutrientItemConfig` you can add custom nutrient items with the following properties.

Id	Translatable Label
translationCache	TranslationCache to lookup the nutrient translation from.
Active	True/false.

NutrientItem can have formulas as shown below.

Id	Translatable Label
Algebra	Can use formulas for calculation, for example, the formula {lblEnergykJ}[/ 1.0] refers to another nutrient item indicated by {<nutrient item id>} and literal operations are demarcated by [] . So in the above example the algebra represents a calculation of the value of nutrient item lblEnergyKJ divided by 1.

Formulas can have calculation methods and those are indicated by CaclulationMethod nodes with the following properties.

Id	Translatable Label
name	Name of the calculation method These can have values that are either `lblFSANZ, lblDefault` or `lblConvertFromKCal.`
active	Indicates whether the method is active or not.
default	Indicates if the method is the default for a particular formula.

DexConfig

Background

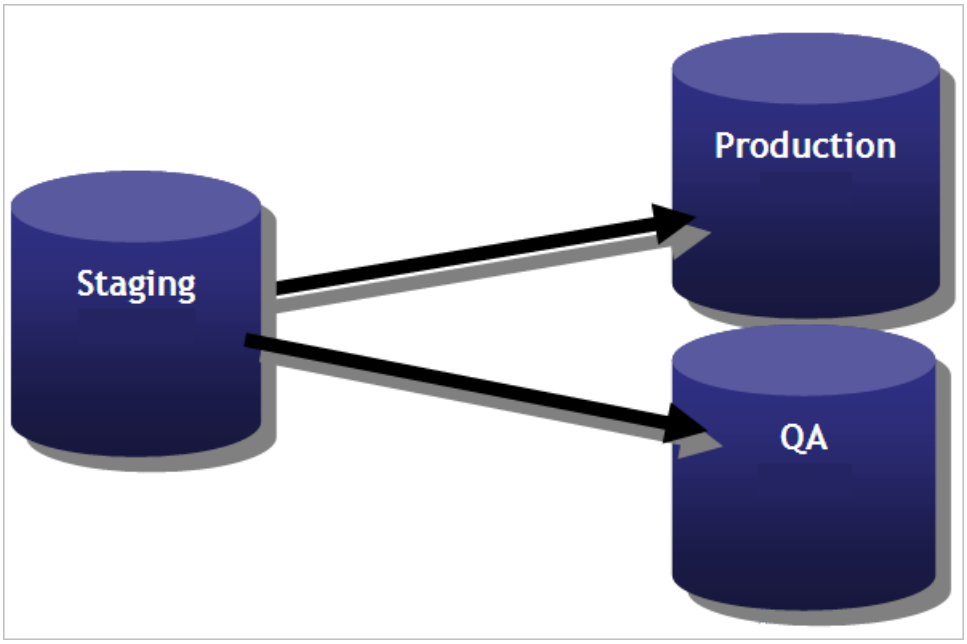
In a typical landscape, there are multiple environments where data is moved into finally culminating at the Production server. Traditionally, this data has either been moved around using SQL scripts or in rare scenarios has been re-entered when moving between systems. Re-entering the data in multiple systems is not only a cumbersome process, but also can be error prone. Furthermore, if some of the data is created locally to a system while the rest is imported using SQL scripts, then data consistency is lost because the Identifiers are recreated on every data creation effort. For example, if two Business Units with the same title, "BU1," are created in two different environments, their identifiers would be disparate. Thus, if a workflow referencing "BU1" has to be migrated from the first to the second environment, the identifiers would not match up.

Solution

To address the problem of having to create data using SQL scripts, the data administration (ADMN) application was released. To address the problem of data migration, we introduced the Data Exchange Service and the concept of a "staging" and a "production" environment.

The staging environment is typically where the data is created. It is typically the only origination point for data for a particular version of the software. All admin data is generated on the staging environment and is then migrated into multiple production environments. A typical data exchange topology looks like that shown in figure 1-1 below.

Figure 1-1: Typical data exchange topology



The Staging environment is where the data is created and then gets migrated to the QA Production first. User acceptance testing is performed on the QA Production environment during which admin data might be required to be updated based on issues found. These changes to admin data will be performed in the Staging and re-migrated to the QA Production environment until the user acceptance testing is complete. Once the data is considered "golden," a data export packet would be created on the Master for Production and data migrated into the Production environment.

By following the process outlined above, you can keep data in sync and preserve data identifiers.

Deployment Considerations

While deploying a Staging and Production set of servers, it is important to note that each system has its own database and its own installation of the software. They are truly disparate systems. In the `EnvironmentSettings.config` file, a section named **`DataExchangeConfig`** is available. This section in the configuration file helps determine if a particular system is a Staging or a Production. The configuration node (shown below) has two child nodes named TargetSystems and SourceSystems. When a target system is defined, the current system is declared to be a Staging. In other words, the current system ("Staging" in the example below) has target systems ("QA Production" and "Production ") that it can export data to.

```
<DataExchangeConfig System="Staging"
NotifierEmail="#REPLACE_ME@DOMAIN.COM">
       <TargetSystems>
              <System>QA Production</System>
              <System>Production </System>
       </TargetSystems>
</DataExchangeConfig>
```

A typical Production environment will have its configuration set as below.

```
<DataExchangeConfig System="Production"
NotifierEmail="#REPLACE_ME@DOMAIN.COM">
       <SourceSystems>
              <System>Staging</System>
       </SourceSystems>
</DataExchangeConfig>
```

A production environment can have only one source system, whereas a staging environment can have multiple target systems.

Content Synchronization and Syndication Settings

Configuration settings for the Content Synchronization and Syndication (CSS) application can be found in the *Agile Product Lifecycle Management for Process Content Synchronization and Syndication Configuration Guide*.

CHAPTER 2

Customizing the User Interface

This chapter discusses upgrading Agile Product Lifecycle Management for Process.
Topics in this chapter include:

- *Customizing the Agile PLM for Process Default Page*
- *Customizing the Site-wide Style Sheet*
- *Link Colors Section*
- *Brand Styles Section*
- *Navigation Section*
- *Supplier Portal Navigation Section*
- *Content Headers*
- *Tables Section*
- *Floating Layers Section*
- *System Messages Section*
- *Login Styles Section*
- *NPD Map Section*
- *Select Controls Section*
- *Updating the Sort Order of the Left Navigation Panel*
- *Extending the Left Navigation Panel*
- *Setting Security on the Left Navigation Panel Items*

Overview

You can customize the look and feel of your Agile PLM for Process installation in two ways:

- Edit the HTML of the home page or "landing page"—by using any HTML editor (see *Customizing the Agile PLM for Process Default Page* on page 2-2)
- Revise the site-wide style sheet (see *Customizing the Site-wide Style Sheet* on page 2-2)

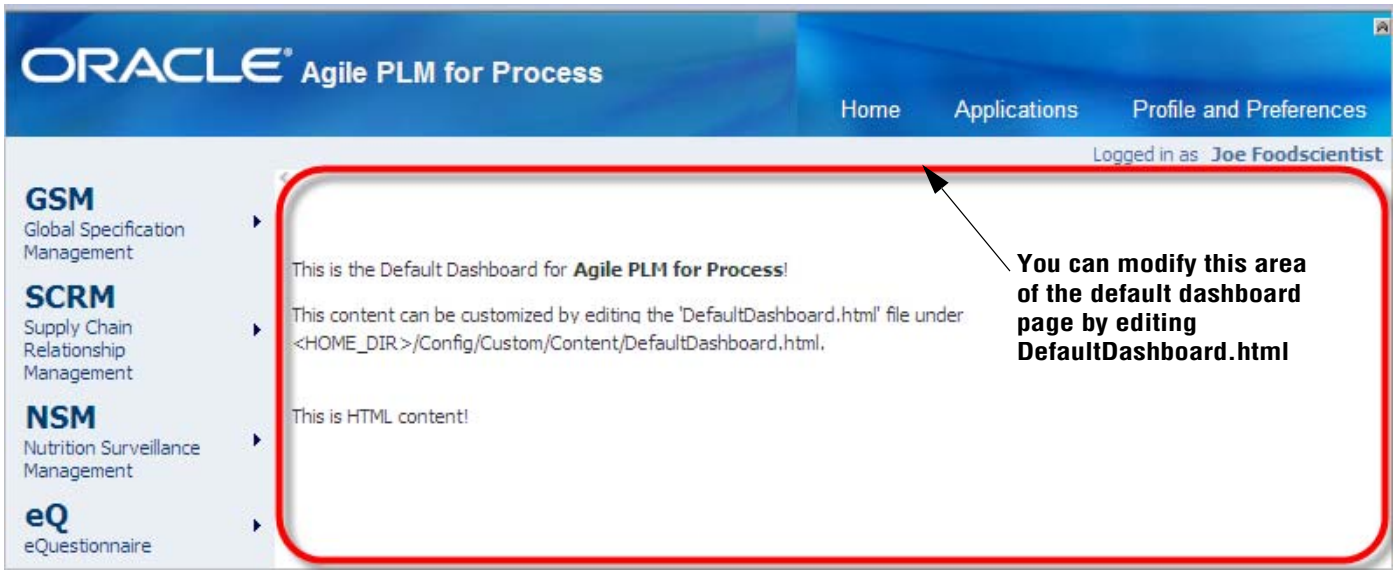
Customizing the Agile PLM for Process Default Page

The default page, or dashboard, of your Agile PLM for Process installation consists partly of an HTML file located at:

```
<HOME_DIR>/Config/Custom/Content/DefaultDashboard.htm
```

This file displays in the main area of your Agile PLM for Process suite, as shown in figure 2-1 below.

Figure 2-1: Default dashboard page



Customizing the Site-wide Style Sheet

You can customize the color scheme and logo of the user interface. Cascading style sheet (.css) files control such visual aspects as background colors, linkcolors, and your company logo.

All stylesheets can be found in : C:\{Prodika_Home}\Web\CSS\

The following stylesheets are used:

Table 2-1: Site-wide stylesheets

Stylesheet	Description
styles.css	This is the primary stylesheet all applications (except Supplier Portal) reference. This stylesheet controls the base font face, font size and font color for the entire application suite. You will also see the following stylesheets: styles_chinese.css, styles_japanchina.css, styles_korean.css, styles_unicode.css. These files control the font face, size and color for styles when other languages are selected. For example, when the user selects Chinese as their primary UI and free text language styles_chinese.css is used in place of styles.css. This stylesheet imports additional stylesheets (CommonStyles.css and Brand.css) used for layout and branding of the application.
sp_styles.css	This is the primary stylesheet for all Supplier Portal interfaces (Supplier Portal and Supplier eQ). This stylesheet controls the base font face, font size and font color for Supplier Portal. This stylesheet imports additional stylesheets (CommonStyles.css and Brand.css) used for layout and branding of the application.
CommonStyles.css	This is the stylesheet that contains the essential application styles. It includes positioning and layout elements as well as all of the Icons used within the application.
Brand.css	This is the stylesheet that contains all branding elements. This stylesheet includes all site colors (navigation, backgrounds, headers, borders etc.), application header and login page graphics. This is the stylesheet that would be edited if you wanted to re-brand the PLM Suite and the stylesheet discussed below.

Re-branding The Suite

"Brand.css" resides at:

```
C:\{Prodika_Home}\Web\CSS\Brand.css
```

You can modify `Brand.css` before or after installing the application suite. In order to add some visual effects, such as your company logo, you must add a Web-viewable graphic file (typically a `.jpg` or `.gif` file) to the following directory:

```
C:\{Prodika_Home}\Web\images\brand
```

Note The style sheet uses standard HTML cascading style sheet tags as set out by the World Wide Web Consortium. Default colors are set out using hexadecimal numbers (and in some cases, the abbreviated, 3-digit hex method). Modifying these settings requires a level of familiarity with cascading style sheets.

The `Brand.css` style sheet file is divided into the following major sections:

Link Colors—Link, active link, visited link (See *Link Colors Section* on page 2-4)

Brand Styles—Appearance of headers, footers, buttons, primary and cobrand logo graphics, and so on. (See *Brand Styles Section* on page 2-5.)

Navigation— Backgrounds and text colors for the Agile PLM suite home page and for all applications, history drop-down list, tabs, and buttons, and so on. (See *Navigation Section* on page 2-6.)

Content Headers—Appearance of page titles and section headings. (See *Content Headers* on page 2-18.)

Tables— Table header rows, backgrounds, and background images. (See *Tables Section* on page 2-19.)

Floating Layers—Control the appearance attributes of all floating layers. (See *Floating Layers Section* on page 2-22.)

System Messages— Warning notes, error messages, and so on. (See *System Messages Section* on page 2-23.)

Login Styles—Customization of the various areas of the login page. (See *Login Styles Section* on page 2-24.)

NPD Map—Appearance of the current step in the workflow map of an NPD activity and that for past and future steps. (See *NPD Map Section* on page 2-28.)

Multi and Single Select and Reorder Controls—Appearance of all single, multi select and reorder controls.

Caution! Although Agile PLM for Process uses cascading stylesheets and other Web standards, the system depends on technology associated with Microsoft Internet Explorer™, and use of that Web browser is required for correct display and functioning of this system.

Consult the guidance below to modify any element in the cascading style sheet.

Link Colors Section

The Link Colors section, shown in figure 2-2 below, is the first section in `Brand.css`.

Figure 2-2: Brand.css style sheet, Link Colors section, showing default settings

```
/*LINK COLORS
------------------------------------------------------------- */
A:link {color: #2B7C92; font-weight: bold;}
A:visited {color: #2B7C92; font-weight: bold;}
A:active {color: #2B7C92; font-weight: bold;}

.cssxPsuedoLink,  .MultiTreeviewNotaccessed, .notaccessed
{color: #2B7C92;}
```

By default, hyperlinks do not change color when a user mouses over them or after a user has clicked them. You can revise that behavior by modifying the color value (in hexadecimal) and font weight.

Note You can modify link color, font weight, and any other valid CSS attribute in this section. By default, all links are underlined.

Brand Styles Section

In the Brand Styles section you can modify, among other things:

- Header background color and image
- Primary logo, which appears prominently on the left of the top header, as shown in figure 2-5, on page 2-6
- Cobrand logo, which appears at the top right of the page, in the header section, as shown in figure 2-3 below

Note Any classes with "_sp" control Supplier Portal. This element allows you to use a separate style for Supplier Portal versus the rest of the application suite.

- Login info bar, as shown in figure 2-3
- Brand bar/product bar, as shown in figure 2-5
- Popup window header background and border, as shown in figure 2-4 below

Figure 2-3: Location of your cobrand logo

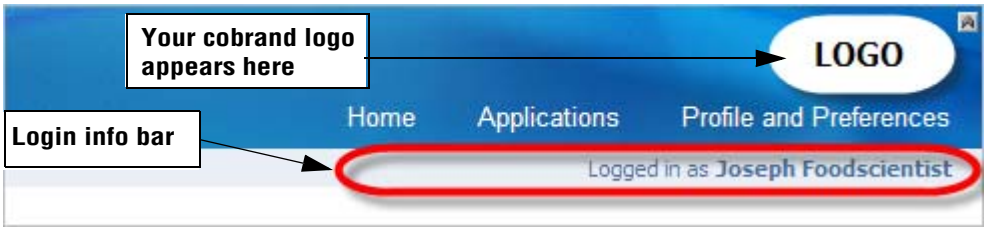


Figure 2-4: Popup window header

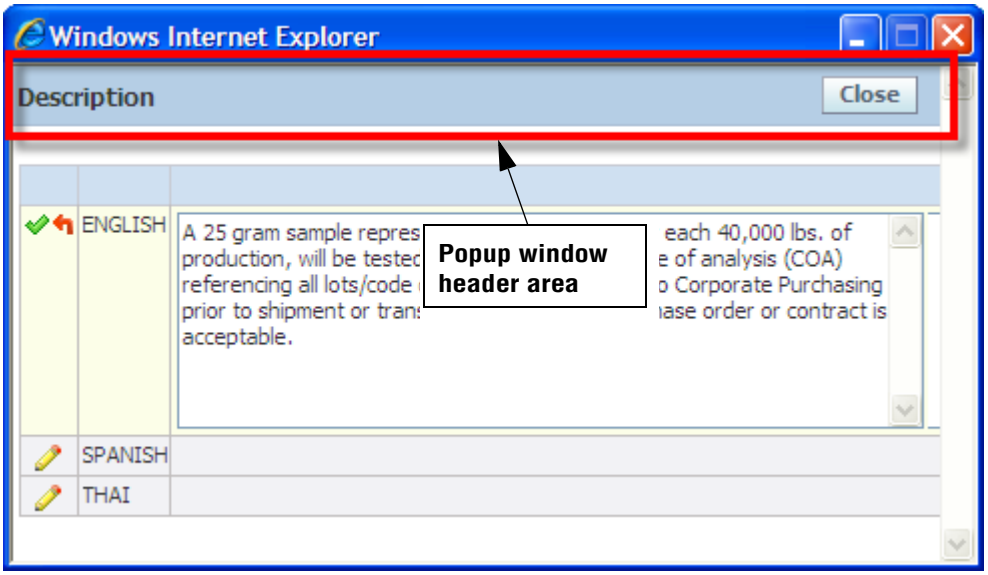


Figure 2-5: Agile PLM for Process header, showing primary logo and brand bar/product bar, whose appearance you can configure using Brand.css



Navigation Section

In the Navigation section, you can modify the appearance of:

- All navigation backgrounds—Navigational drop-down lists and menu items, for example. (See *All Navigation Backgrounds Subsection* on page 2-6.)
- Platform navigation—Top menu bar. (See *Platform Subsection* on page 2-7.)
- Portal navigation—Left navigation panel. (See *Portal Navigation Subsection* on page 2-7.)
- Supplier Portal navigation—Top menu bar in Supplier Portal. (See *Supplier Portal Navigation Section* on page 2-8.)
- Application navigation—Left navigation panel as it appears once you are within an application. (See *Application Navigation Subsection* on page 2-9.)
- Tree navigation—Appearance of all tree navigation menus used in ADMN and LIO. (See *Tree Navigation Subsection* on page 2-10.)
- Content navigation —Borders, colors, and backgrounds for content navigation. (See *Content Navigation Subsection* on page 2-14.)
- History drop-down list—Borders, colors, and any background image for the history drop-down list. (See *History Drop-Down List Subsection* on page 2-12.)
- Tabs—Borders, colors, and background images for all tabs used throughout Agile PLM for Process. (See *Tabs Subsection* on page 2-13.)
- Content Tabs—Borders, colors, and background images for inline content tabs used throughout Agile PLM for Process.
- Buttons—Borders, colors, and background images for all buttons in the Agile PLM for Process suite, including page-level function buttons and system buttons. (See *Buttons Subsection* on page 2-16.)

All Navigation Backgrounds Subsection

In this subsection, shown in figure 2-6, you can modify the appearance of the backgrounds of the following navigational elements: Portal, Platform, History, and General Navigation. Application and Content Navigation elements are controlled separately.

Figure 2-6: Navigational Backgrounds Subsection, Navigation section, Brand.css

```
/*Navigation Backgrounds*/
.cssxPlatformDrop, .cssxPlatformGroup, .cssxPortalGroup,
.cssxPortalMenu, .cssxPortalDrop, .cssxAppNav, .cssxAppNavBg,
.appNav-Level2Item, .historyMenuItem, .historyMenuGroup
{background-color: #eaeff5;}
```

Platform Subsection

In this subsection, shown in figure 2-7, you can modify the color of the text in the top menu bar, as shown in figure 2-8.

Figure 2-7: Platform subsection, Navigation section, Brand.css

```
/*PLATFORM*/
.cssxPlatformMenuItem, .cssxPlatformMenuItemH  /*Platform Text
Color*/
{color: #fff;}
```

Figure 2-8: The top menu bar, whose appearance is controlled by the style elements in the Platform subsection



Portal Navigation Subsection

In this subsection, shown in figure 2-9 below, you can modify the appearance of the left navigation panel, shown in figure 2-10.

Figure 2-9: Portal Navigation subsection, Navigation section, Brand.css

```
/*PORTAL*/
.cssxPortalDropItemH, .cssxPlatformDropItemH /*Highlight*/
{
background-color: #ccd7e0;
}

.cssxPortalNavTitle, .cssxPortalNavCaption /*Text Color*/
{
color: #013d74;
}
```

Figure 2-10: The left navigation panel, whose appearance is controlled by the style elements in the Portal Navigation subsection



Supplier Portal Navigation Section

In this subsection, shown in figure 2-11, you can modify the attributes of header links in the supplier portal top menu bar, as shown in figure 2-12.

Figure 2-11: Supplier Portal subsection, Navigation section, Brand.css

```
/*SUPPLIER PORTAL*/
.cssxSP_Nav, .cssxSP_Nav a:link, .cssxSP_Nav a:hover, .cssxSP_Nav
a:visited
{
color: #ffffff;
font-weight: normal;
font-size: 100%;
}
```

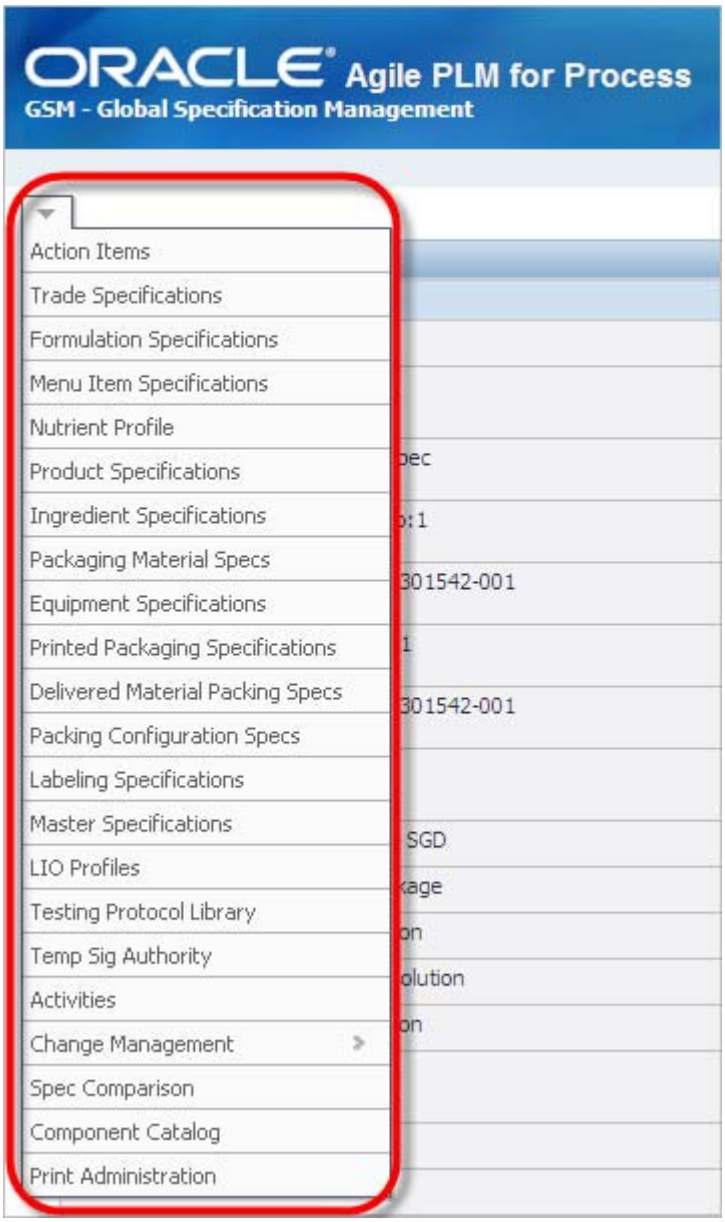
Figure 2-12: Supplier Portal Navigation subsection, Navigation section, Brand.cssShow supplier portal Blue header, cropped like screen 2-8



Application Navigation Subsection

In this subsection, you can modify the appearance of the left navigation panel that displays once you are in an application, as shown in figure 2-13.

Figure 2-13: Left navigation panel that displays once you are in GSM



Tree Navigation Subsection

In this subsection, shown in figure 2-14, you can modify the appearance of the tree navigation fly out menus that display when the user right clicks on a tree node, as shown in figure 2-15.

Figure 2-14: Tree Navigation subsection, Navigation section, Brand.css

```
/* TREE NAVIGATION (ADMIN, LIO)

------------------------------------------------------------ */

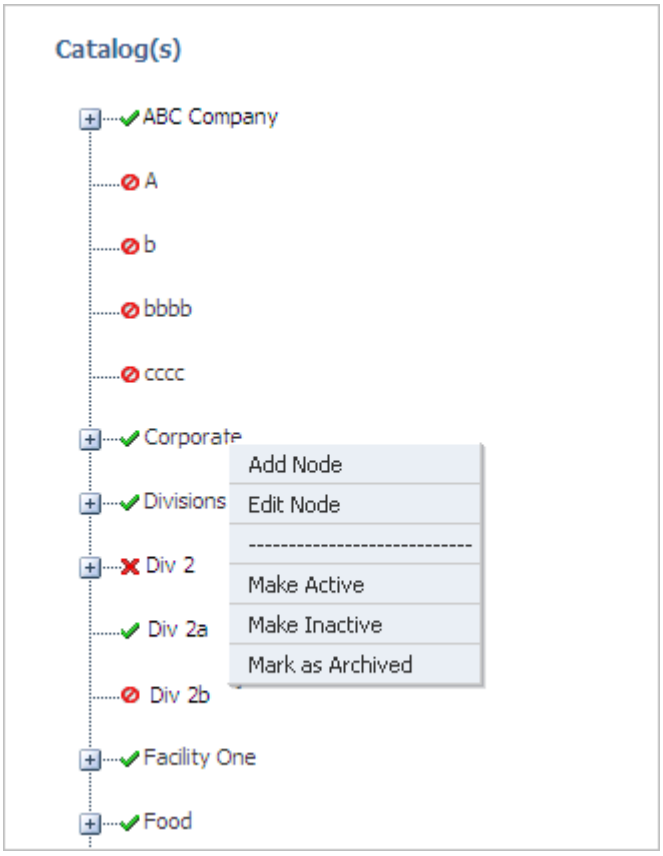
.appNav-TopItem, .appNav-TopItem2 /*Parent Category*/
                {
                border: 1px solid #f2f9fe;
                border-right-color:#9aa3aa;
                border-bottom-color:#9aa3aa;
                background-color: #ccd7e0;
                }

.appNav-TopItemHover, .appNav-TopItemHover2 /*Parent Category
Highlight*/
                {
                border: 1px solid #f2f9fe;
                border-right-color:#9aa3aa;
                border-bottom-color:#9aa3aa;
                background-color: #fff;
                }

.appNav-Level2ItemHover, .appNav-Level2ItemSelected , .appNav-
TopItemActive2, .appNav-TopItemActive /*Parent & Item Hightlights &
Onclicks*/
                {
                background-color: #fff;
                }
/*Text Color*/

.appNav-Level2Item td, .appNav-TopItemActive2 td, .appNav-TopItem
td, .appNav-TopItem2 td, .appNav-TopItemHover td, .appNav-
TopItemHover2 td, .appNav-TopItemActive td, .appNav-Level2ItemHover
td, .appNav-Level2ItemSelected td, .NavMenu-Level2Item td, .NavMenu-
TopItem td, .NavMenu-TopItemHover td, .NavMenu-TopItemActive td,
.NavMenu-Level2ItemHover td, .NavMenu-Level2ItemSelected td
                {
                color: #013d74;
                }
```

Figure 2-15: ADMN taxonomy listing, right click action



History Drop-Down List Subsection

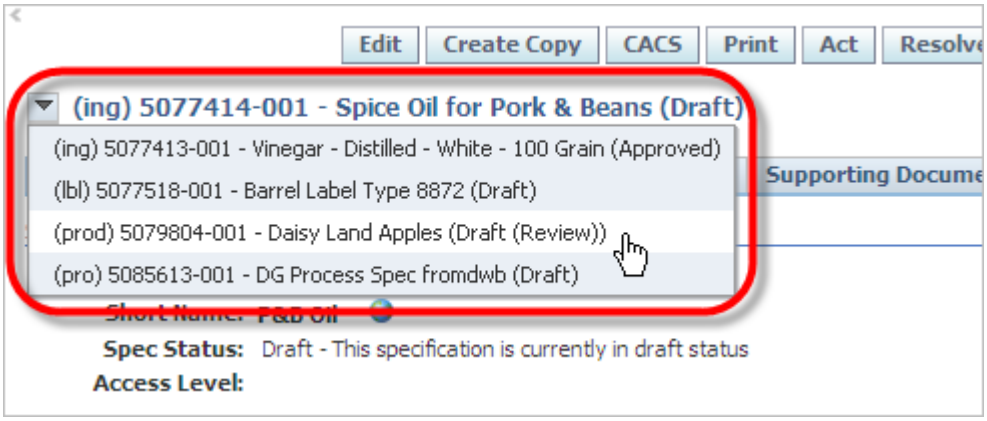
In this subsection, shown in figure 2-16 below, you can modify the borders, colors, and any background image used in history drop-down lists, as shown in figure 2-17.

Figure 2-16: History Drop-Down List subsection, Navigation section, Brand.css

```
/*HISTORY*/
.historyTopMenuItem, .historyTopMenuItemHover /*History Menu Top
Menu Background */
{
background-image: url(../images/brand/subDimTabBg.gif);
}

.historyMenuItemHover /*History Menu Highlight*/
{
background-color:#FFFFFF;
}
```

Figure 2-17: The history drop-down list, whose appearance is controlled by the style elements in the History Drop-Down List subsection of the Navigation section of Brand.css



Tabs Subsection

In this subsection, shown in figure 2-18 below, you can modify the borders, colors, and any background images used in all tabs throughout Agile PLM for Process. Figure 2-19 shows tabs in GSM.

Figure 2-18: Tabs subsection, Navigation section, Brand.css

```
/*TABS*/
.tabmenu /*Tab Bottom Line*/
{
border-bottom: #92badc 2px solid;
}

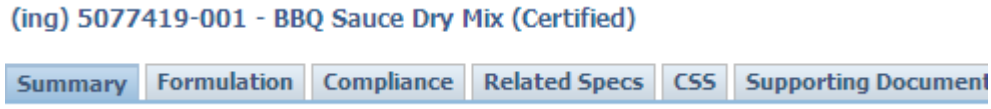
.subtabmenu /*SubTab Bottom Line*/
{
border-bottom: #82b2db 3px solid;
}

.DefaultTab, .subDefaultTab /*Unselected Tabs*/
{
background-image: url(../images/brand/subDimTabBg.gif);
border: 1px solid #c0c0c0;
}

.SelectedTab, .subSelectedTab /*Selected Tabs*/
{
background-image: url(../images/brand/subTabBg.gif);
border: 1px solid #a3bed8;
color: #3c3c3c;
}

.TabMenuText, .tabnav_unselectedtab_span, .subTabMenuText /*Text
Color*/
{
color: #3e5576;
 }
```

Figure 2-19: Tabs, GSM



Content Navigation Subsection

In this subsection, shown in figure 2-20 below, you can modify the appearance of all content navigation. This includes content tabs and content navigation. This is primary used in the Formulation Specification, Process tab as shown in figure 2-21.

Figure 2-20: Content Navigation subsection, Navigation section, Brand.css

```
/*CONTENT NAVIGATION
------------------------------------------------------------ */
.cssxContentNavContainer
{
background-color: #fbfbfb;
border: solid 1px #dedede;
}

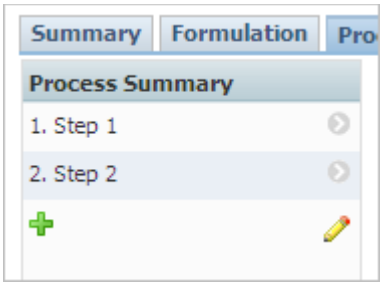
.cssxContentNavParentH, .cssxContentNavParentA
{
   background:url(../images/brand/contentnav-bg.gif) repeat;
color: #303030;
font-weight: bold;
border:none;
}
.cssxContentNavChildA, .cssxContentNavChildH
{
background-color: #eaeff5;
color: #303030;
}

.cssxContentTab
{
background: transparent; border-color: transparent; border-width:
0px; font-weight: bold; color: #3e5576; font-size: 100%;
cursor:pointer
}

.cssxContentTabContainer
{
cursor:pointer;
background: url(../images/brand/contenttab-bg.gif);
border-left: 1px solid #c0c0c0;
border-right: 1px solid #c0c0c0;
}

.cssxContentTabContainerActive
{
cursor:pointer;
background: url(../images/brand/contenttab-bg-active.gif);
border-left: 1px solid #a3bed8;
border-right: 1px solid #a3bed8;
}
```

Figure 2-21: Content tabs from a formulation specification, Process tab, Bill of Materials and Packaging tabs



Buttons Subsection

In this subsection, shown in figure 2-22 below, you can modify the borders, colors, and any background images used in all buttons throughout Agile PLM for Process. As shown in the figure, there are separate sections for page-level function buttons (see figure 2-23), system buttons (see figure 2-24, on page 2-17), Supplier Portal Submit button and SubFunction buttons (see figure 2-25).

Figure 2-22: Buttons subsection, Navigation section, Brands.css

```
/*BUTTONS*/

/*Page-Level Function Buttons*/
input.elButton, a.elButton, a.elButton:visited, a.elButton:linked,
a.elButton:hover,
.actionMenu-TopMenuItem, .actionMenu-TopMenuItemHover, .actionMenu-
MenuGroup, .actionMenu-MenuItem, .actionMenu-MenuItemHover
{
border-right: solid 1px #7b8194;
border-bottom: solid 1px #7b8194;
border-top: solid 1px #a5a9b6;
border-left: solid 1px #a5a9b6;
background-image: url(../images/brand/btn-bg.gif);
background-color: #c9e5ec;
color: #586073;
}
/*System Buttons*/
.cssxBtnFunction, A.cssxBtnFunction:link, A.cssxBtnFunction:visited,
A.cssxBtnFunction:hover, .cssxBtnControl, A.cssxBtnControl:link,
A.cssxBtnControl:visited, A.cssxBtnControl:hover
{
border-right: solid 1px #7b8194;
border-bottom: solid 1px #7b8194;
border-top: solid 1px #a5a9b6;
border-left: solid 1px #a5a9b6;
background-image: url(../images/brand/btn-bg.gif);
background-color: #c9e5ec;
color: #586073;
}.cssxBtnSubFunction, A.cssxBtnSubFunction:link,
A.cssxBtnSubFunction:visited, A.cssxBtnSubFunction:hover
{
color: #586073;
}
.cssxBtnSupPortal, A.cssxBtnSupPortal:link, A.cssxBtnSupPortal:visited,
A.cssxBtnSupPortal:hover
{
border-right: solid 1px #357aba;
border-bottom: solid 1px #357aba;
border-top: solid 1px #357aba;
border-left: solid 1px #357aba;
background-image: url(../images/brand/sp_submit_back.gif);
background-color: #4f90cd;
color: #FFFFFF;
}
/* SubFunction Button Menu Items
------------------------------------------------------------ */
#cssxSubMenuList .cssxSubMenuItem {
border: solid 1px #93b1c2;
background-color:#d6e3ef;
color: #586073;
}
#cssxSubMenuList #cssxSubMenuItemFirst {
border-top: solid 1px #93b1c2;
}
```

Figure 2-23: Page-level function buttons, whose appearance is controlled by the style elements in the Buttons subsection of the Navigation section of Brand.css

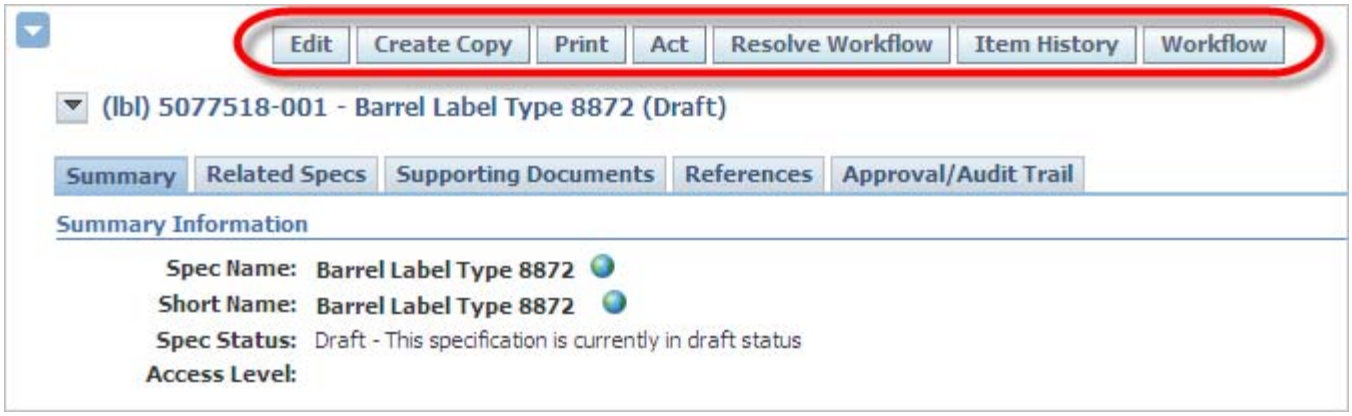


Figure 2-24: Sample of system buttons, whose appearance is controlled by the style elements in the Buttons subsection of the Navigation section of Brand.css

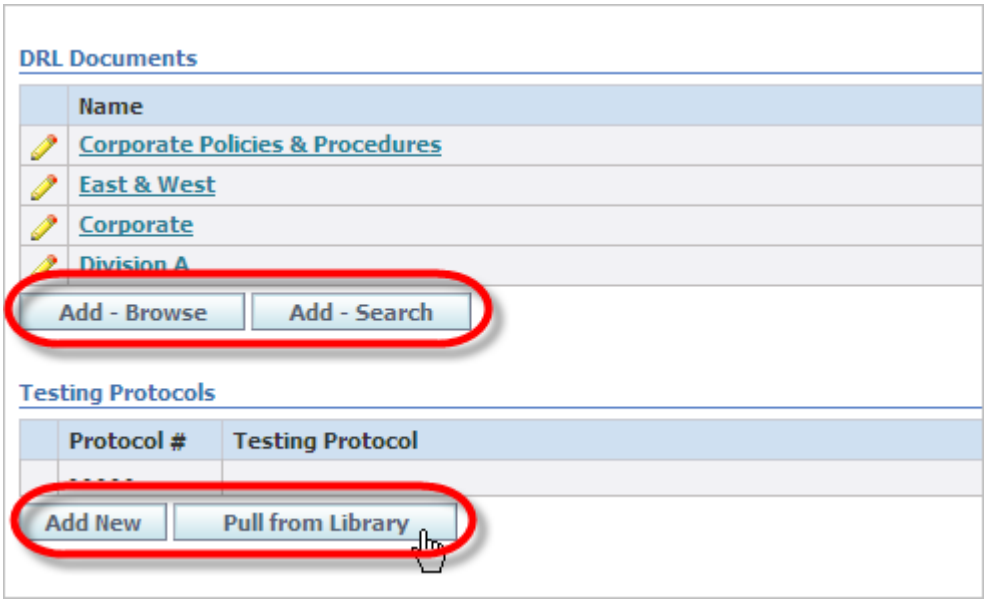
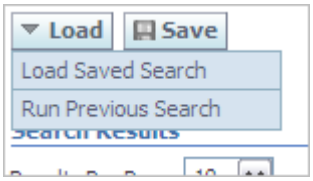


Figure 2-25: Sample of subfunction buttons, whose appearance is controlled by the style elements in the Buttons subsection of the Navigation section of Brand.css



Content Headers

In the Content Headers section, shown in figure 2-26, you can modify the appearance of page titles and section headers.

Figure 2-26: Content headers section of Brand.css

```
/*CONTENT HEADERS
---------------------------------------------------------- */
/*Page Titles*/
.cssxPageTitle, .cssxPageTitle H1, .cssxPageTitle a:link,
.cssxPageTitle a:visited, .cssxPageTitle a:hover, .cssxPageTitle
a:active
{
color: #3a5a87;
}

/*Section Headers*/
h2, h4, h2 td
{
color: #426ca7;
font-weight: bold;
}
h2, h4
{
color: #426ca7;
border-bottom: #567fc7 1px inset;
font-size: 100%;
}

/*Floating layer Section Headers*/
h5
{
color: #426ca7;
font-size: 100%;
font-weight: bold;
}
```

Figure 2-27: Section header



Figure 2-28: Page title



Tables Section

In the Tables section, shown in figure 2-29, you can modify the appearance of:

- Table headers
- Table background
- Action Items header, as shown in figure 2-30

- Compound grids, as shown in figure 2-31

Figure 2-29: Tables section of Brand.css

```
/*TABLES
---------------------------------------------------------- */

/* Table Headers */
.cssxBaseGrid th, .cssxActionGrid TH, .cssxActionGrid .cssxActionGridHeaders,
.cssxTreeDataGrid th
{
background-color:#cfe0f1;
}
.cssxBaseGrid th a:link, .cssxBaseGrid th a:visited, .cssxBaseGrid th a:hover,
.cssxBaseGrid th a:active,  /*Linked Table Header Text Color*/
{
color:#333;
}
/*Table Background*/
.cssxTreeDataGrid, .cssxActionGrid td, .cssxBaseGrid,
{
background-color:#f2f2f5;
}
.cssxBaseGrid .cssxSelectGrid
{
background-color:#fff;
}
/*Action Grid Header*/
.cssxActionGrid .cssxActionHeader
{
background-image: url(../images/brand/hBar-Bg.gif);
color:#333;
}
.cssxActionGrid th a:link, .cssxActionGrid th a:visited, .cssxActionGrid th a:hover,
.cssxActionGrid th a:active, .cssxActionGrid td /*Linked Action Grid Header Text Color*/
{
color:#333;
}
/*Compound Grids*/
.cssxGridHeader
{
background:url(../images/brand/GridHeader-bg.gif) repeat;
background-color:#8fb9db;
color: #3a5a87;
font-weight:bold;
}
.cssxCompoundGrid
{
background-color: #EAEFF5;
}
/*Print Dialogs - Nested Tree Table*/
.DataGridRowHeader, .cssxBaseGrid .DataGridRowHeader
{
background-color:#dedede
}
/*Alternating Color Rows - Custom Data Search*/
.cssxBaseGridPrimaryRow
{
background-color:#FFFFFF;
}
.cssxBaseGridSecondaryRow {}

/* Quick Entry Grid */
.cssxSelectGridContainer
{
    background:#FFF;
filter:progid:DXImageTransform.Microsoft.Shadow(color=#9f9f9f,direction=135,
Strength=2);
}
.QuickEntryBorder
{
border:1px solid #c1bebe;
}
.cssxSelectGridAlt /*Alternate Row Color*/
{}
.cssxSelectGridHover
{
background-color: #f2f2f5;
}
```

Figure 2-30: Action Items header

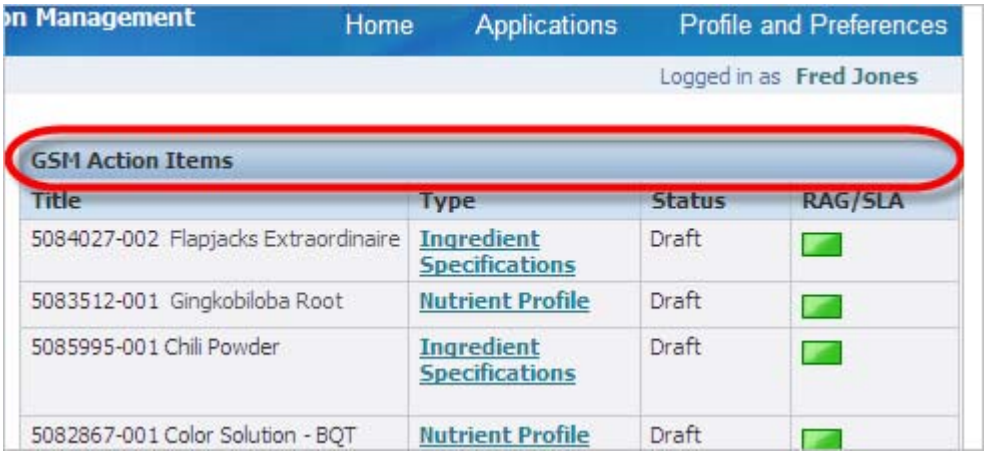
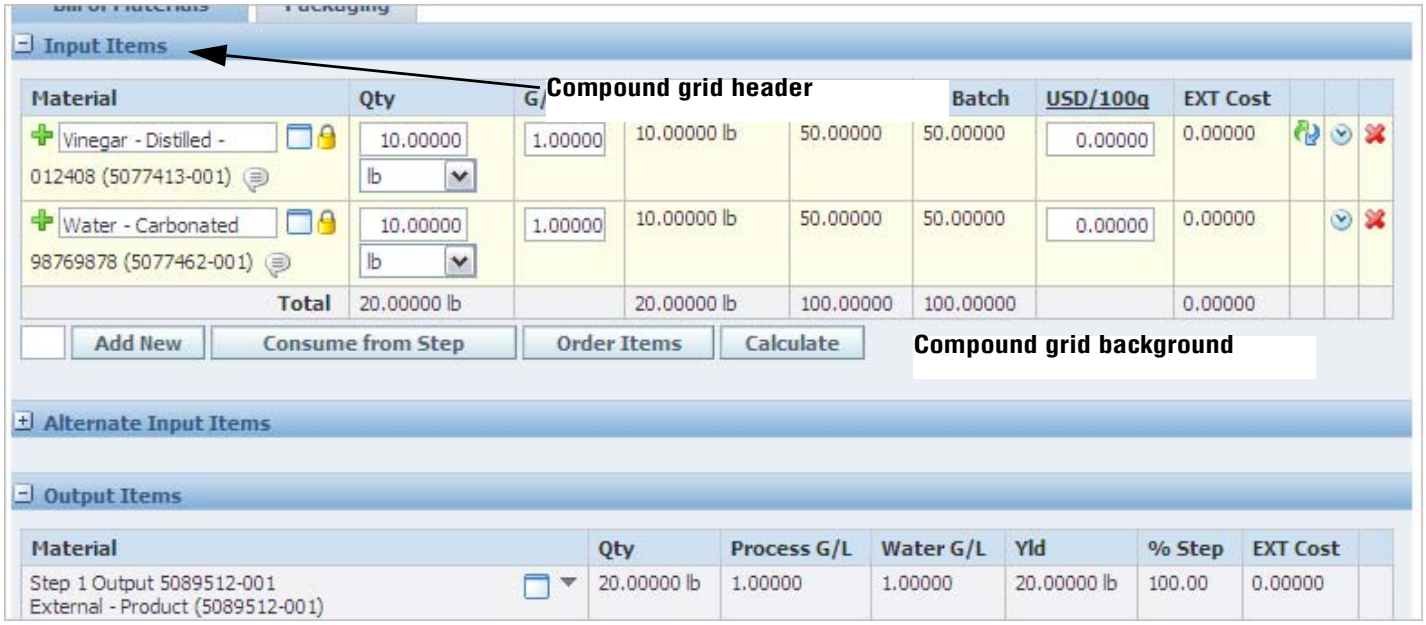


Figure 2-31: Compound Grids

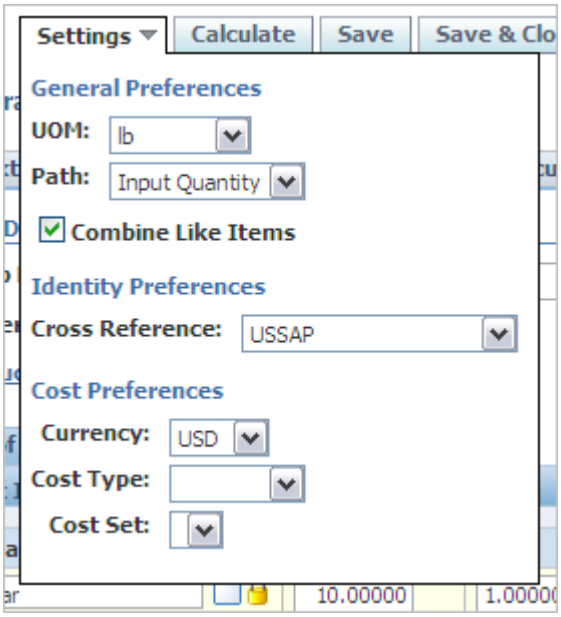


Floating Layers Section

In the Floating Layers section, shown in figure 2-32 below, you can modify the appearance of:

- Action Menu Floating Layer
- Formulation Output Tags Layer
- Output Warning Layer

Figure 2-32: Floating Layers section of brand.css



System Messages Section

In the System Messages section, shown in figure 2-33 below, you can modify the appearance of:

- Warning note header image and background color
- Error message header image and background color
- Information note header image and background color
- Notification message header image and background color

Figure 2-33: System Messages section of Brand.css

```
/*SYSTEM MESSAGES
------------------------------------------------------------ */
.cssxWarningNote /*Warning Message Header*/
{
background-image:url(../images/brand/warning-header.gif);
}

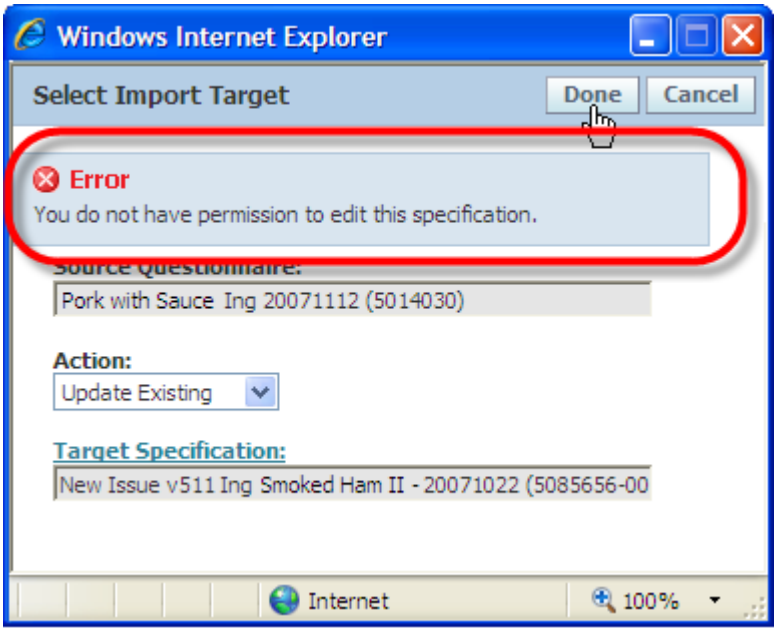
.cssxErrorNote /*Error Message Header*/
{
background-image:url(../images/brand/error-header.gif);
}

.cssxInfoNote /*Information Message Header*/
{
background-image:url(../images/brand/info-header.gif);
}

.cssxNotificationNote /*Notification Message Header*/
{
background-image:url(../images/brand/notify-header.gif);
}

.cssxWarningNote, .cssxErrorNote, .cssxInfoNote,
.cssxNotificationNote /*Warning, Error, Information, Notification
Messages*/
{
border:solid 1px #b2c8dc;
background-color: #d9e5ef;
}
```

Figure 2-34: Error message, with image, background color, and border style set by .cssErrorNote



Login Styles Section

In the Login Styles section, shown in figure 2-35 below, you can modify the appearance of different sections of the login page. The six style elements in the Login Styles section apply to five areas of the login screen (two elements apply to one area).

Figure 2-35: Login Styles section of Brand.css

```
/*LOGIN STYLES
---------------------------------------------------------- */
.cssxLogin-1 /*Row 1*/
{background-color:#ededed;height:70px;}

.cssxLogin-2 /*Row 2*/
{background-color:#f4f4f4;}

.cssxLogin-3a /*Row 3 Column 1*/
{background-color:#f4f4f4;}

.cssxLogin-3b /*Row 3 Column 2*/
{background-image:url(../images/style/login-lightBlue_back.jpg);
background-repeat:repeat-x;background-color:#fbfbfb}

.cssxLoginPhoto
 {
 background-image: url(../images/style/login-people.jpg);
 width: 417px;
 height: 54px;
 }

.cssxLoginGraphic
 {
 background-image: url(../images/style/login-globe.jpg);
 width: 351px;
 height: 259px;
 }
```

The area affected by each of the six elements is illustrated in the following figures:

cssxLogin-1— *Login screen area affected by the .cssLogin-1 style element of Brand.css* on page 2-25

cssxLogin-2—*Login screen area affected by cssxLogin-2 style element of Brand.css* on page 2-26

cssxLoginPhoto—*Login screen area affected by the .cssxLoginPhoto style element in Brand.css* on page 2-26

cssxLogin-3a and **cssxLoginGraphic**—*Login screen area affected by cssxLogin-3a and cssxLoginGraphic style elements of Brand.css* on page 2-27

cssxLogin-3b—*Login screen area affected by the cssxLogin-3b style element of Brand.css* on page 2-27

Figure 2-36: Login screen area affected by the .cssLogin-1 style element of Brand.css



Figure 2-37: Login screen area affected by cssxLogin-2 style element of Brand.css



Figure 2-38: Login screen area affected by the .cssxLoginPhoto style element in Brand.css



Figure 2-39: Login screen area affected by cssxLogin-3a and cssxLoginGraphic style elements of Brand.css

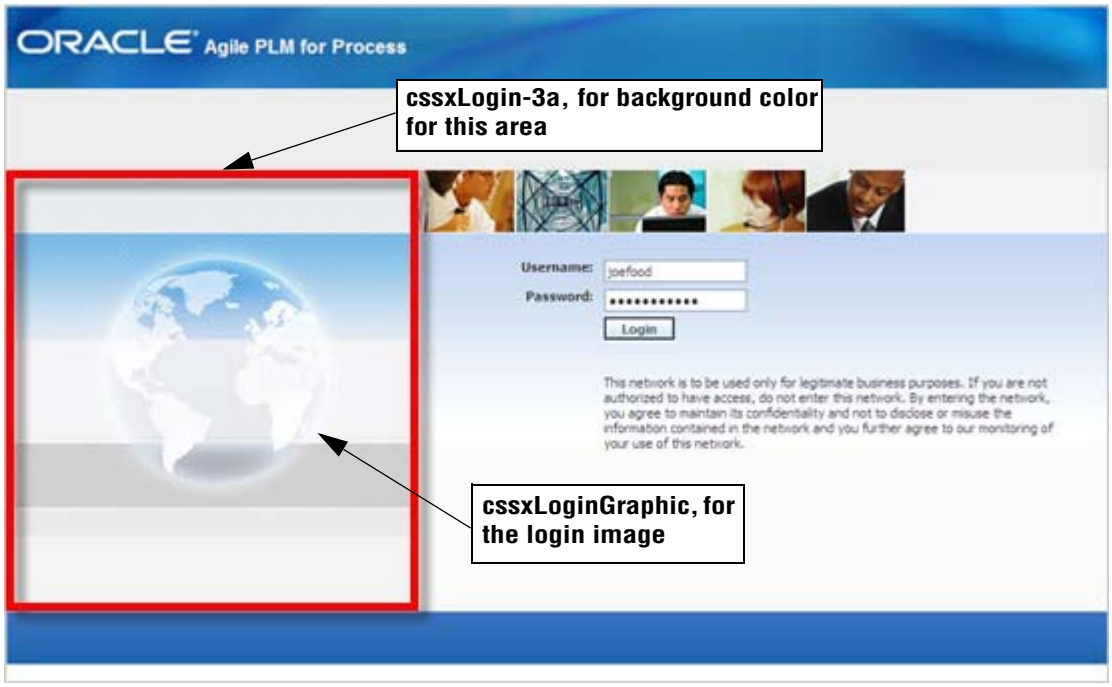
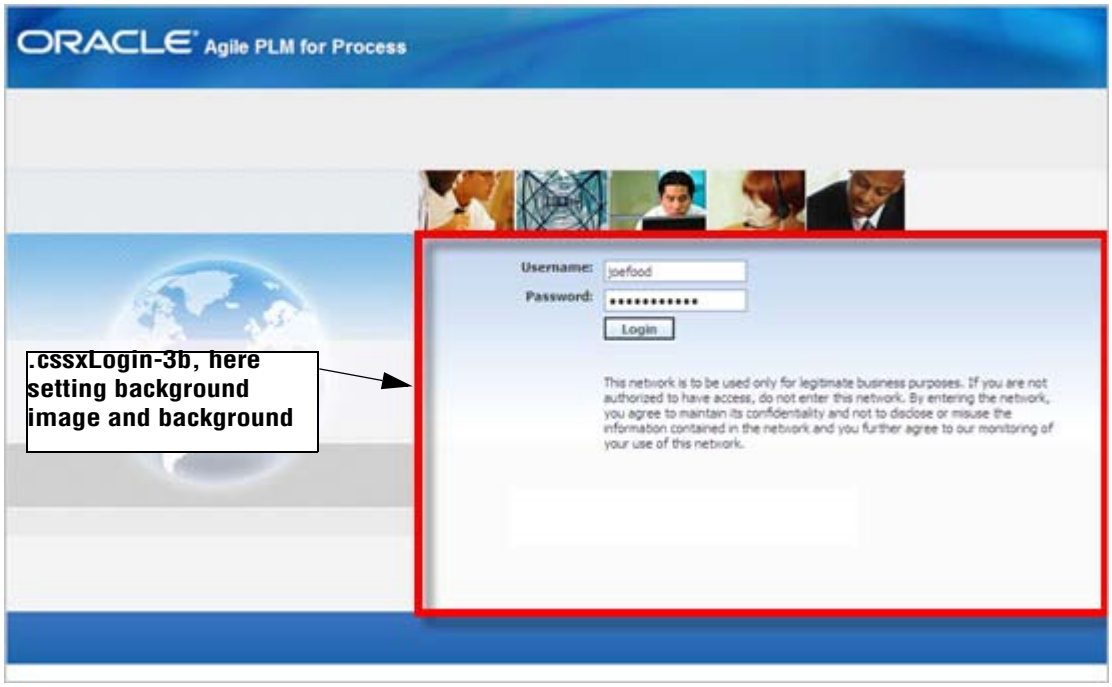


Figure 2-40: Login screen area affected by the cssxLogin-3b style element of Brand.css



NPD Map Section

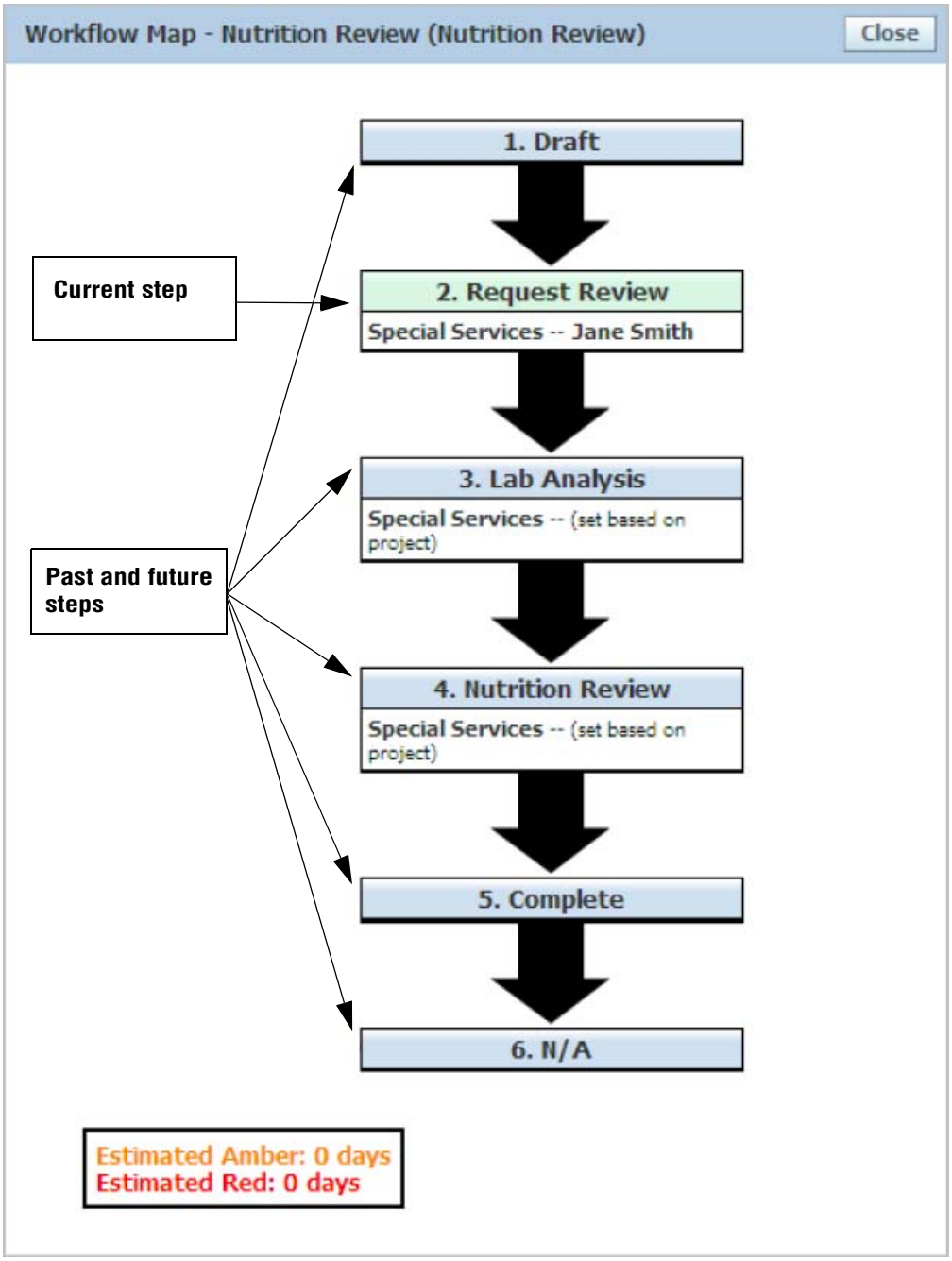
In the NPD Map section, shown in figure 2-41 below, you can modify the appearance of the workflow map that you can view from within the New Product Development (NPD) application. Specifically, you can control the appearance of the current (highlighted) workflow step and the past and future (non-highlighted) steps. Figure 2-42, on page 2-29 shows a sample of an NPD map for reference.

Figure 2-41: NPD Map section of Brand.css

```
/*NPD MAP
------------------------------------------------------------ */
.cssxHiMapStep /*NPD Map - Highlighted Workflow Step*/
{
color: #333;
background-color: #CCCCCC;
background-image:url(../images/brand/NPDHiMapStep.gif);
background-repeat:repeat-x;
}

.cssxMapStep  /*NPD Map - Workflow Step*/
{
color: #333;
background-image:url(../images/brand/NPDMapStep.gif);
background-repeat:repeat-x;
background-color: #b6b6b6;
}
```

Figure 2-42: Map of an NPD activity showing highlighted and non-highlighted workflow steps

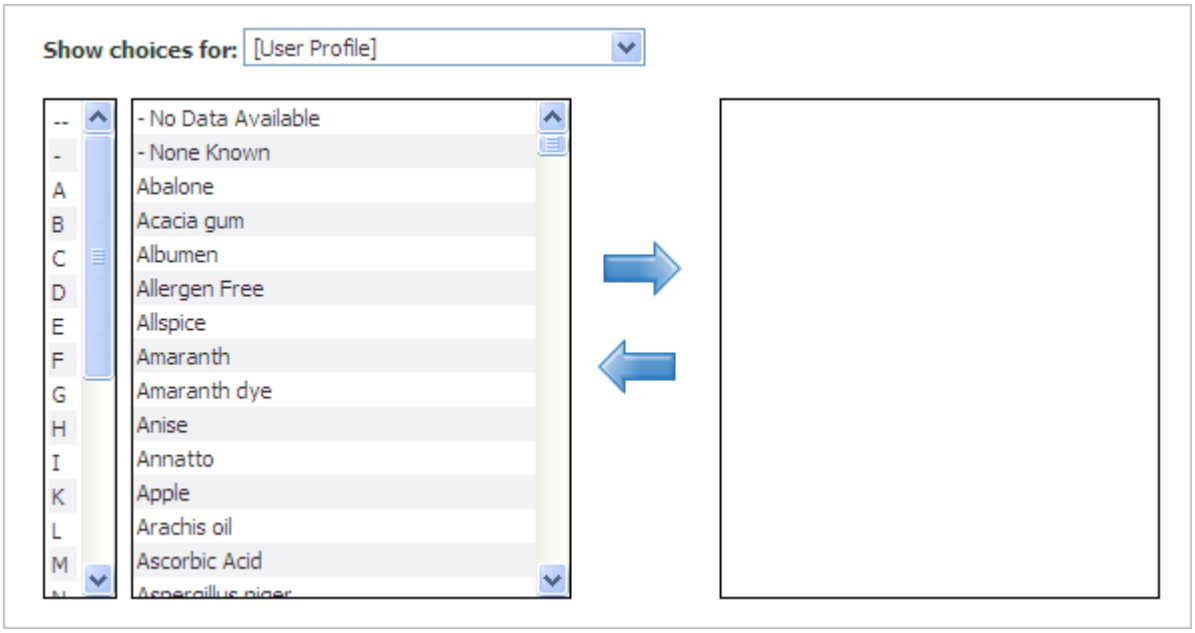


Select Controls Section

The alternating row and highlight colors can be controlled here. This affects the following controls:

- Single select controls
- Multi-select controls, as shown in figure 2-43
- Re-order controls

Figure 2-43: Multi-select control, featuring highlighted alternating rows



Updating the Sort Order of the Left Navigation Panel

You can use the `SiteMap-DisplayOrder.xml` file to change the menu item ordering for existing menus that come with the product. All the menu items have a SortOrder property that is evaluated and ordered in ascending order.

For example:

```
<MenuItem ID="Menu1" SortOrder="10" configChildKey="ID"/>
<MenuItem ID="Menu2" SortOrder="20" configChildKey="ID"/>
```

The above menus are displayed as in the order Menu1, Menu2. If the sort order is transposed, then Menu2 gets displayed before Menu1. The actual number or the spacing between these tags does not matter. In the above example, 10 menu items could be inserted between Menu1 and Menu2 and yet be sorted deterministically. If two menus have the same sort order, then the display order is not guaranteed between those two elements.

Extending the Left Navigation Panel

With the `SiteMap-Extensions.xml` file you can add new menu items that are not part of the core product. In general a menu item would look like the following:

```
<MenuItem ID="translation Id" DisplayText="Generally note
       used… just to indicate what gets displayed"
       SecurityProfileRef="Security Profile Name"
       SkinRef="Skin Profile Name"
       TranslationRef="Translation Profile Name"
       SortOrder="Some number" NavigateUrl="http://
       SomeUrl.com"  />
```

Menu items can be nested to create menu hierarchies, as shown below:

Application Wide Menu
  Applications
    GSM

...then the menu definition would look like this:

```
<MenuItem ID="ApplicationWideMenu" DisplayText="**Application Wide
Menu" >
     <MenuItem ID="Applications" DisplayText="**Applications">
           <MenuItem ID="GSMSideNav" DisplayText="**GSM">
              <MenuItem ID="[translation Id]"
                 DisplayText="[Generally note used… just to indicate
                 what gets displayed]"
                 SecurityProfileRef="[Security Profile Name]"
                 SkinRef="Default Skin"
                 TranslationRef="Application Menu"
                 SortOrder="[Some number]"
                 NavigateUrl="[http://SomeUrl.com]"  />
           </MenuItem>
     </MenuItem>
</MenuItem>
```

The values in [ ] need to be changed.

For more information, see *Setting Security on the Left Navigation Panel Items* below. Other than that, the NavigateUrl indicates the url to navigate to when a user clicks a menu item.

Setting Security on the Left Navigation Panel Items

This section discusses how to use the `MenuConfig-Extensions.xml` file to secure left navigation items.

More than likely, only the security settings for new menu items will need to be modified. Every SiteMap entry has three properties that determine how the menu item is rendered in terms of security, appearance, and the translated text that is shown to the users. These properties are SkinRef, SecurityRef, and TranslationRef. All of these properties except the SkinRef cascade to child elements; so if a menu item does not have a SecurityRef property, then it inherits the security profile of its parents.

Security Profile

Below is a snippet of the security provider configuration in MenuConfig.xml:

```
<Provider ID="SecurityProvider" …>
      <SecurityProfiles…>
          <SecurityProfile ID="Default" Mode="Visibility">
                  <Allow Roles="*"/>
            </SecurityProfile>
            <SecurityProfile ID="PQSReportViewer"
Mode="Visibility" Application="PQS">
               <Allow Roles="[PQS_ADMIN],[PQS_Reporter]"/>
            </SecurityProfile>
            …
     </SecurityProfiles>
</Provider>
```

The SiteMap menu items have security profiles associated with every menu. For example, if a menu item were set up with a profile of `PQSReportViewer`, it would evaluate to the above security profile. What this security profile describes is "Any PQS user with the roles `[PQS_ADMIN]` OR `[PQS_Reporter]` has visibility to the menu item."

If Application were blank or not defined, then it would mean "Any user with the roles `[PQS_ADMIN]` OR `[PQS_Reporter]` has visibility to the menu item."

A Groups attribute can be specified in a comma delimited list using canonical name with the optional language aware notation, otherwise English is assumed, or the group pkid can be specified. Access can be denied to users with use of the Deny tag. The following three examples all demonstrate valid use of the Groups attribute:

```
<Allow Groups="GLOBAL_SPEC_ADMINS"/>
<Deny Groups="205502a693e2-2548-4edd-8730-873f7b2bcf00"/>
<Deny Groups="GLOBAL_SPEC_ADMINS^0"/>
```

To specify menu items use the MenuItemID attribute. The MenuItemID values correspond to the menu item IDs defined in the site map files.

```
<Deny Roles="*" Groups="2055eb16a6d3-fa57-4a1e-b6de-
b863051036b9" MenuItemID="lbl5816" />
```

The Groups and Roles attributes are required. If the attribute is intended to be ignored then it should be included with the value left as an empty string. If no attributes are specified for the Allow or Deny nodes (ex. <Allow/> or <Deny/>) then all attributes are defaulted to be equal to "*".

```
<Deny Roles="*" Groups="" MenuItemID="lbl5816" />
```

Wild card of "*" is allowed on Groups, Roles, MenuItemID and Application, and it signifies "all."

Translation Profile

Typically all pipelines are configured with a dynamic translation provider, which usually looks like this:

```
<Provider ID="ApplicationWideMenuTranslationProvider" …>
     <TranslationCaches…>
       <TranslationCache ID="GSMSideBar" Path="frmMaster/ctlNavMenu1"/>
       <TranslationCache ID="NDPSideBar" Path="frmNPD/ctlSidebar"/>
     </TranslationCaches>
...
</Provider>
```

If the menu item has a translation profile, it looks up the cache from the translation caches collection. If a menu item has a TranslationRef of "GSMSideBar", then it maps to the frmMaster/ctlNavMenu1 translation cache.

This defines skin profiles specific to the Component Art Navigation items, which use ItemLooks to define the way navigation controls look. When a menu or menu item is configured with an item look, the LookId property is very important and all the properties are case sensitive. Every Skin can have only a finite set of ItemLooks, and the LookId determines the look of the menu items in various situations.

Valid LookIds for Top-Level Menus

```
DefaultChildSelectedItemLook
DefaultDisabledItemLook
DefaultItemLook
DefaultSelectedItemLook
```

Valid LookIds for MenuItems

```
ChildSelectedLook
DefaultSubItemChildSelectedLook
DefaultSubItemDisabledLook
DefaultSubItemLook
```

```
DefaultSubItemSelectedLook
DisabledLook
Look
SelectedLook
```

Syntax for Setting Properties

All parameters that are picked up from context supplied to the MenuBuilderService are of the form `${variableName[,defaultValue]}`.

APPENDIX A
Feature Configurations and Extensions

This appendix contains a list of feature configurations and extensions for Agile Product Lifecycle Management for Process version 6.0.0.6. Topics include:

- *Feature Configurations*
- *Extensions*

Feature Configurations

Table A-1: Features

Configuration	Definition
"Common.ObjectLevelSecurity.Enabled" value="false"	Enables object level security (OLS).
"Common.Auditing.LifecycleEvents.Enabled" value="true"	Populates the commonLifecycleEventLog table when specifications are changed.
"Common.ObjectLevelSecurity.Enabled" value="false"	Explicitly manage the units of measure (UOMs) for raw material specifications.
"Common.GSMBusinessUnitSecurity.Enabled" value="false"	Enables business unit security for GSM.
"Common.SCRMBusinessUnitSecurity.Enabled" value="false"	Enables business unit security for SCRM.
"Common.StrictPercentBreakdowns.Enabled" value="true"	Forces the %breakdowns to be created from Component Catalog.
"DWB.FICIntegration.Enabled" value="true"	Deprecated.
"DWB.Integration.NSM.Enabled" value="true"	Deprecated.
"DWB.ExportToGSM.AutoSnapShot.Enabled" value="true"	Deprecated.
"DWB.Integration.NSM.Enabled" value="false"	Deprecated.
"DWB.ExportToGSM.AutoSnapShot.Enabled" value="false"	Deprecated.
"EQ.SupplierInitiatedQuestionaire.Enabled" value="true"	Enables the Supplier-Initiated Questionnaire feature.
"EQ.SupplierInitiatedQuestionaire.EQItem.RequireSpecContents.Enabled" value="false"	When producing a supplier-initiated questionnaire, setting this to true causes all information derived from the sourced specification to be required. This means that the supplier must populate these fields before the questionnaire can be returned.

Table A-1: Features

Configuration	Definition
"EQ.TradeQuestionnaire.Enabled" value="true"	Enables the Trade Questionnaires feature in EQ.
"EQ.TradeQuestionnaire.ExtendedAttributes.Enabled" value="true"	Enables extended attributes for trade questionnaires in EQ and Supplier Portal.
"EQ.TradeQuestionnaire.EACustomSections.Enabled" value="true"	Enables custom sections for trade questionnaires in EQ and Supplier Portal.

Table A-2: Entity Query Tool (EQT) Search History Tracking

Configuration	Definition
"EQT.SearchTracking.Enabled" value="true"	Enables the tracking of previous search results (ISearchEntryBOs).
"ExtendedAttributes.ReferencedItemCollection.Archived" value=”true"	Enables the Referenced Item Collection extended attributes type.
"GSM.AvailableUOMs.Explicit.Enabled" value="false"	Only use the UOMs defined AvailableUOMs only for consumption.
"GSM.PrintedPackagingSpec.Markings.Enabled" value="true"	Enables markings on Printed Packaging specifications.
"GSM.EQT.ImportBreakdown.FoodItemCatalog.Enabled" value="true"	Deprecated.
"GSM.EQT.ImportBreakdown.ComponentCatalog.Enabled" value="true"	Enables Entity Query Tool (EQT) searches on the Component Catalog (such as is available on Import Breakdowns).
"GSM.EQT.IngComparisonRptView.TradeSpec.Enabled" value="false"	Enables specification comparison for trade specifications.
"GSM.EQT.SpecSummary.FormulationSpec.CountriesWhereUsed.Enabled" value="true"	When searching for specifications to attach to another specification or object, the configuration allows users to search using the Entity Query Tool (EQT) for Countries Where Used on specifications.
"GSM.EQT.SpecSummary.FormulationSpec.ConceptPlusChildren.Enabled" value="true"	When searching for specifications to attach to another specification or object, the configuration allows users to search using EQT for Concept with the criteria Plus Children on specifications.
"GSM.EQT.SpecSummary.FormulationSpec.ExactMatchConcept.Enabled" value="true"	When searching for specifications to attach to another specification or object, this configuration allows users to search using EQT for Concept with the criteria Exact Match Concept on specifications.
"GSM.EQT.SpecSummary.FormulationSpec.ConceptHierarchical.Enabled" value="true"	When searching for specifications to attach to another specification or object, this configuration allows users to search using EQT for Concept with the criteria Hierarchical on specifications.
"GSM.EQT.SpecSummary.FormulationSpec.ShortName.Enabled" value="true"	Enables specification short name search on formulation specifications.
"GSM.EQT.SpecSummary.FormulationSpec.NPDProject.Enabled" value="true"	Enables NPD Project search on formulation specifications.

Table A-3: GSM Compliance Items

Configuration	Definition
GSM.AllergenKTC.Enabled	These feature keys enable the availability of the search properties for these compliances. Note that the middle of each contains a compliance type (e.g.. "Additive") and an operator (e.g.. "KTC"). The operators definitions are as follows: **KTC** = Known To Contain **MC** = May Contain **DNC** = Does Not Contain
GSM.AllergenMC.Enabled	
GSM.AllergenDNC.Enabled	
GSM.IntoleranceKTC.Enabled	
GSM.IntoleranceMC.Enabled	
GSM.IntoleranceDNC.Enabled	
GSM.AdditiveKTC.Enabled	
GSM.AdditiveMC.Enabled	
GSM.AdditiveDNC.Enabled	
GSM.ComplianceWith.Enabled	
"GSM.References.Dependencies.HideEmptySections" value="true"	Hides empty sections in the where used popup if enabled.
"GSM.References.NPDActivities.Enabled" value="true"	This configuration turns on the section presenting NPD Activities that are linked to a GSM specification or object.
"GSM.References.FormulationSpec.Enabled" value="true"	Enables the formulation specification section in the where used popup.
"GSM.References.TradeSpec.ChildIngredientSpecs.Enabled" value="true"	On a trade specification, controls whether the Child Specification link displays.
"GSM.SideNav.ComponentCatalog.Enabled" value="true"	Allows users to search for ingredient specifications based on the formulation specifications that create them and the trade specifications that are tied to it.
"GSM.SideNav.LIOProfile.Enabled" value="true"	Enables LIO profiles from the GSM menu.
"GSM.SideNav.NutrientProfile.Enabled" value="true"	Other GSM side navigation items that can be turned on or off based on features.
"GSM.SideNav.IngredientSpec.Enabled" value="true"	Other GSM side navigation items that can be turned on or off based on features.
"GSM.SideNav.PackagingMaterialSpec.Enabled" value="true"	Other GSM side navigation items that can be turned on or off based on features.
"GSM.SideNav.PrintedPackagingSpec.Enabled" value="true"	Other GSM side navigation items that can be turned on or off based on features.
"GSM.SideNav.DeliveredMaterialPackingSpec.Enabled" value="true"	Other GSM side navigation items that can be turned on or off based on features.
"GSM.SideNav.PackingConfigurationSpec.Enabled" value="true"	Other GSM side navigation items that can be turned on or off based on features.
"GSM.SideNav.LabelingSpec.Enabled" value="true"	Other GSM side navigation items that can be turned on or off based on features.
"GSM.SideNav.TempSigAuthority.Enabled" value="true"	Other GSM side navigation items that can be turned on or off based on features.
"GSM.SideNav.FormulationSpec.Enabled" value="true"	Turns on the section presenting NPD Activities that are linked to a GSM specification or object.

Table A-3: GSM Compliance Items

Configuration	Definition
"GSM.PercentBreakdown.FoodItemCatalog.Enabled" value="true"	Determines if FIC or Component Catalogs are available for % breakdowns.
"GSM.PercentBreakdown.ComponentCatalog.Enabled" value="true"	Determines if FIC or Component Catalogs are available for % breakdowns.
"GSM.Relationship_Info.Disabled" value="true"	Disables the relationship section in process specifications (legacy) and trade specifications.
"GSM.PublishToSupplierPortal.Enabled" value="true"	Determines if % breakdowns in GSM can be marked with a publish to supplier portal. Additionally, it determines if a sourcing approval can be published to supplier portal.
"GSM.FormulationSpec.ExtendedAttributes.Enabled" value="true"	Allows you to turn on/off simple extended attributes for the object.
"GSM.FormulationSpec.AttachmentsOnFormulationSpec.Enabled" value="true"	Allows you to add attachments to the formulation specification.
"GSM.TradeSpec.LabelClaims.Enabled" value="true"	Turns a specific Field On or Off. When the configuration is turned off the field will not be presented for viewing or interaction.
"GSM.TradeSpec.ProcessSheet.Enabled" value="true"	Turns a specific Field On or Off. When the configuration is turned off the field will not be presented for viewing or interaction.
"GSM.TradeSpec.ProcessSheet.AllowEdit.Enabled" value="false"	Disables the ability to add relationships between process/trade specifications as functionality is replaced with Formulation Specification relationships.
"GSM.TradeSpec.IncludeTopLevelPackagingInTare.Enabled" value="true"	Includes the trade specification's packaging and printed packaging specifications in the Tare Weight calculation.
"GSM.ProcessSheetSpec.TradeSpec.Enabled" value="false"	Complements GSM.TradeSpec.ProcessSheet.Enabled on the Process Sheet.
"GSM.ProcessSheetSpec.TradeSpec.AllowEdit.Enabled" value="false"	Disables the ability to add relationships between process/trade specifications as functionality is replaced with formulation specification relationships.
"GSM.FormulationSpec.FormulationAttributes.NPDProjectName.Enabled" value="true"	Via this configuration setting a formulation specification provides users with a field to link the formulation specification to an NPD project.
"GSM.FormulationSpec.FormulationAttributes.NPDProjectNameFreeText.Enabled" value="false"	Allows the Project Name field on the formulation specification to be entered as free text instead of being linked to a NPD project.
"GSM.FormulationSpec.Preferences.DefaultCombineLikeItems.Enabled" value="true"	Sets combine like items preference when user preference is not defined.
"GSM.FormulationSpec.Preferences.DefaultAutoCalculate.Enabled" value="true"	Sets BOM auto calculation preference when user preference is not defined.
"GSM.FormulationSpec.QuickEntry.Enabled" value="true"	Enables formulation input population via quick entry.
"GSM.NutrientProfile.CustomPanels.Enabled" value="false"	Enables the Product Fact Sheet on the Supporting Documents tab for trade specifications and menu item specifications, and enables Rounding Rules and Final Value on nutrient profiles.
"GSM.NPDProjectInActionItems.Enabled" value="false"	Enables the formulation specification action items if it has relationship with an NPD project.

Table A-3: GSM Compliance Items

Configuration	Definition
"GSM.FormulationSpec.ShortName.Enabled" value="true"	Turns on short name for formulation specifications.
"GSM.FormulationSpec.IngredientBreakdowns.IngredientBreakdown.CompliesWith.Enabled" value="true"	Allows the complies with column to be visible on % Breakdowns that are tied to formulation outputs.
"GSM.FormulationSpec.IngredientBreakdowns.IngredientBreakdown.ComponentFunction.Enabled" value="true"	Allows the component column to be visible on % Breakdowns that are tied to formulation outputs.
"GSM.NutrientProfile.ReferenceAmountClassification.Enabled" value="true"	Allows setting of RACC on a nutrient profile.
"GSM.NutrientProfile.LabelComposition.Enabled" value="true"	Enables the Label Composition tab on a nutrient profile if the F&C bundle is installed.
"Prodika.Reporting.SideNav.CustomReports.Enabled" value="true"	Disables the Reporting feature in the certified database.
"GSM.Integration.NSM.Enabled" value="true"	Allows users to punch out to NSM from nutrition panels. This controls the NSM button located on the nutrient profile, nutrient analysis, etc.
"GSM.Integration.CACS.Enabled" value="true"	Allows users to kick off CACS from a specification. This controls the action button on the specifications for CACS.
"GSM.Integration.ExportToDWB.Enabled" value="true"	Deprecated.
"GSM.Integration.FSIS.Enabled" value="true"	Allows users to create and manage Regulatory Filings on the trade specification.
"GSM.LabelClaims.Enabled" value="true"	Turns label claims on or off. If customers are not using the feature this can clean up the UI.
"GSM.FormulationSpec.InputItems.FormulationSearch.Enabled" value="true"	Enables formulation specification Input Item advanced search request.
"GSM.IngredientSpec.Breakdowns.FormulationSearch.Enabled" value="true"	Enable ingredient specification Breakdown advanced search request.
"GSM.IngredientSpec.DesignAttributes.DeliveredNetWeight.Enabled"	Controls visibility of select columns printed for Design Attributes on ingredient specifications.
"GSM.IngredientSpec.DesignAttributes.UnitConversion.Enabled"	
"GSM.IngredientBreakdowns.UnionClassifications.Enabled" value="true"	Access to the breakdown is allowed if you have access to any classification on the breakdown. Disabling this changes logic from 'OR' (need access to one classification) to an 'AND' (need access to all classifications).
"SectionLevelEditing.Extension.Enabled" value="true"	Enables the Section Level Editing extension.
"Common.MoistureConfiguration.Enabled" value="false"	Capturing moisture instead of solids.
"GSM.URLAttachment.EditableURL.Enabled" value="true"	Enables the URL text field to be editable as attachment.
"GSM.URLAttachment.PassUserContextID.Enabled" value="true"	Enables passing the user token to the 3rd party site to login the external system.

Table A-4: Custom Revision

Configuration	Description
"GSM.GetCustomRevision.Enabled" value="true"	Enables custom revision capability.
"GSM.GetCustomRevision.TradeSpecMaterial.Default.Enabled" value="true"	Sets the default of the get latest revision icon for [Spec Type]. A value of true will set the default for the lock to unlocked. A value of false will set the default for the lock to locked.
"GSM.GetCustomRevision.TradeSpecPackaging.Default.Enabled" value="true"	Sets the default of the get latest revision icon for [Spec Type]. A value of true will set the default for the lock to unlocked. A value of false will set the default for the lock to locked.
"GSM.GetCustomRevision.TradeSpecAlternatePackaging.Default.Enabled" value="true"	Sets the default of the get latest revision icon for [Spec Type]. A value of true will set the default for the lock to unlocked. A value of false will set the default for the lock to locked.
"GSM.GetCustomRevision.FormulationSpecBOMMaterial.Default.Enabled" value="true"	Sets the default of the get latest revision icon for [Spec Type]. A value of true will set the default for the lock to unlocked. A value of false will set the default for the lock to locked.
"GSM.GetCustomRevision.FormulationSpecAlternates.Default.Enabled" value="true"	Sets the default of the get latest revision icon for [Spec Type]. A value of true will set the default for the lock to unlocked. A value of false will set the default for the lock to locked.
"NPD.NonBUAssociatedActivityTypes.Enabled" value="true"	Enables non-business unit associated activity types in the activity type search popup.
"NPD.ObscurePrivateProjects.Enabled" value="false"	Enables hiding of NPD project names from searches when user does not have project access.

Table A-5: Portal Side Navigation

Configuration	Definition
"Portal.SideNav.WFA.Enabled" value="true"	Sidenav feature config keys determine the availability of menu items. Consider the following example: "Portal.SideNav.NPD.Enabled" The first token "Portal" is the application in which the menu item resides. The third token is the name of the menu item "NPD". This configuration will enable the NPD menu item in the Portal application.
"Portal.SideNav.DataAdmin.Enabled" value="true"	
"Portal.SideNav.UGM.Enabled" value="true"	
"Portal.SideNav.SupplierPortalAdmin.Enabled" value="true"	
"Portal.SideNav.SCRM.Enabled" value="true"	
"Portal.SideNav.Reporting.Enabled" value="true"	
"Portal.SideNav.PQS.Enabled" value="true"	
"Portal.SideNav.NPD.Enabled" value="true"	
"Portal.SideNav.GSM.Enabled" value="true"	
"Portal.SideNav.EQ.Enabled" value="true"	
"Portal.SideNav.GSM.FICTerm.Enabled" value="true"	
"Portal.SideNav.CSS.Enabled" value="true"	
"Portal.SideNav.SupplierPortal.Enabled" value="true"	
"Portal.SideNav.NSM.Enabled" value="true"	
"Portal.SideNav.CacheAdmin.Enabled" value="true"	
"Portal.SideNav.DRL.Enabled" value="true"	
"Portal.SideNav.CACS.Enabled" value="true"	
"Portal.SideNav.DWB.Enabled" value="true"	Deprecated.

Table A-6: Data Administration

Configuration	Definition
"ProdikaReporting.FromGSM.SpecTypeReport.Enabled" value="true"	The Reporting application can be directly navigated to and pre-loaded with a configuration defined by a channel by clicking on a button when searching for a specification in GSM. This button is enabled or disabled depending on this configuration.
"ProdikaReporting.FromGSM.SpecInstanceReport.Enabled" value="true"	The Reporting application can be directly navigated to and pre-loaded with a configuration defined by a channel by clicking on a button when currently on a specification in GSM. This button is enabled or disabled depending on this configuration.
"ProdikaReporting.FromSCRM.SpecTypeReport.Enabled" value="true"	The Reporting application can be directly navigated to and pre-loaded with a configuration defined by a channel by clicking on a button when currently searching for a sourcing approval in SCRM. This button is enabled or disabled depending on this configuration.
"ProdikaReporting.FromSCRM.SpecInstanceReport.Enabled" value="true"	The Reporting application can be directly navigated to and pre-loaded with a configuration defined by a channel by clicking on a button when currently on a sourcing approval in SCRM. This button is enabled or disabled depending on this configuration.

Table A-6: Data Administration

Configuration	Definition
"ProdikaReporting.EQT.SpecSummary.TradeSpec.AdditivesPossiblyContained.Enabled" value="true"	These used to affect the availability of the search properties that concern these compliances (e.g.. Additives, Allergens, Intolerances). This configuration has now been consolidated into the following feature config keys: GSM.AllergenKTC.Enabled GSM.AllergenMC.Enabled GSM.AllergenDNC.Enabled GSM.IntoleranceKTC.Enabled GSM.IntoleranceMC.Enabled GSM.IntoleranceDNC.Enabled GSM.AdditiveKTC.Enabled GSM.AdditiveMC.Enabled GSM.AdditiveDNC.Enabled GSM.ComplianceWith.Enabled You'll notice the middle of each contains a compliance type (e.g.. "Additive") and an operator (e.g.. "KTC"). The operators definitions are as follows: KTC = Known To Contain MC = May Contain DNC = Does Not Contain
"PQS.Session.Enabled" value="true"	Tells PQS to display sessions instead of scorecards in its action items.
"SCRM.EQT.EnforceBUVisibility.Enabled" value="false"	Enforces SCRM BU security in Entity Query Tool (EQT) searches in SCRM.
"SCRM.SideNav.SpecRelatedSourcingApprovals.Enabled" value="true"	Specification-related sourcing approvals can now be directly searched from SCRM.
"SCRM.SideNav.NonSpecRelatedSourcingApprovals.Enabled" value="true"	Non-specification-related sourcing approvals can now be directly searched from SCRM.
"UGM.ChangeRequest.BUAdministrationDelegation.Enabled" value="false"	Restricts UGM user administrators to specific business units.
"UGM.ChangeRequest.Groups.UserGroupAssociations.Enabled" value="true"	Allows multiple users to be added/removed to group from Group page in UGM.

Table A-7: Availability

Configuration	Description
"CustomPortal.SCRMFacility.Participants.Enabled" value="false"	Determines whether a use can see the information in the section Portal Users on a facility in SCRM.
"1009.CustomSection.Search.Enabled" value="false"	Makes custom sections available for searching so users can add them as criteria for packaging specifications.
"1004.CustomSection.Search.Enabled" value="false"	Makes custom sections available for searching so users can add them as criteria for ingredient specifications.

Table A-7: Availability

Configuration	Description
"6501.CustomSection.Search.Enabled" value="false"	Makes custom sections available for searching so users can add them as criteria for product specifications.
"2121.CustomSection.Search.Enabled" value="false"	Makes custom sections available for searching so users can add them as criteria for printed packaging specifications.
"1009.ExtendedAttribute.Search.Enabled" value="false"	Makes extended attributes available for searching so users can add them as criteria for packaging specifications.
"1004.ExtendedAttribute.Search.Enabled" value="false"	Makes extended attributes available for searching so users can add them as criteria for ingredient specifications.
"6501.ExtendedAttribute.Search.Enabled" value="false"	Makes extended attributes available for searching so users can add them as criteria for product specifications.
"2121.ExtendedAttribute.Search.Enabled" value="false"	Makes extended attributes available for searching so users can add them as criteria for printed packaging specifications.
"5012.ExtendedAttributes.Search.Enabled" value="true"	Makes extended attributes available for searching so users can add them as criteria for specification-related sourcing approvals.
"5019.ExtendedAttributes.Search.Enabled" value="true"	Makes extended attributes available for searching so users can add them as criteria for non specification-related sourcing approvals.
"5816.ExtendedAttributes.Search.Enabled" value="true"	Makes extended attributes available for searching so users can add them as criteria for formulation specifications.
"5822.ExtendedAttributes.Search.Enabled" value="true"	Makes extended attributes available for searching so users can add them as criteria for smart issue requests.
"5012.CustomSection.Search.Enabled" value="true"	Makes custom sections available for searching so users can add them as criteria for specification-related sourcing approvals.
"5019.CustomSection.Search.Enabled" value="true"	Makes custom sections available for searching so users can add them as criteria for non specification-related sourcing approvals.
"5816.CustomSection.Search.Enabled" value="true"	Makes custom sections available for searching so users can add them as criteria for formulation specifications.
"5822.CustomSection.Search.Enabled" value="true"	Makes custom sections available for searching so users can add them as criteria for smart issue requests.
"ShowReferenceAmountClassification" value="true"	Deprecated.
"StepPath" value="582873A19CBC-F66B-450E-9A85-33D13ABB7F6E"	This determines what calculation method is used in formulation specifications.
"GSM.FormulationSpec.SpecSummary.ShortName.MaxLength" value="40"	Sets the maximum length of the short name on the formulation specification.
"GSM.ProcessSheetSpec.DefaultUOM.ISOCode" value="KG"	Deprecated.
"GSM.FormulationSpec.DefaultCurrency.ISOCode" value="USD"	Sets the default currency for cost book selection for a formulation specification.

Table A-7: Availability

Configuration	Description
"GSM.Attachment.External.URL" value="TestExtPage.aspx"	Allows users to add an external URL as attachments in GSM.
"GSM.Attachment.External.UserToken" value="3215145"	Allows users to add URLs as attachments in GSM.
"BUAdministrator" value="prodikaadmin"	The username of the user that has unrestricted rights to grant other users BU delegation rights for the BU Delegation feature.
"UserGroupManager" value="prodikaadmin"	The username of the user that can assign groups directly to the user.

Extensions

The following extensions are located in Prodika/Main/config/Extensions.

Content

This folder contains the "homepage" of the Agile PLM for Process application suite in various languages. It uses html syntax.

ContextSensitiveHelpItems.config

This allows augmentation of the context sensitive help in GSM among other places. The id attribute identifies the control (can be seen by viewing the aspx or ascx file as text). The path attribute identifies the path to the context sensitive help.

cssLibConfig.xml

Config file that was changed:

/Prodika/Main/config/Extensions/cssLibConfig.xml

A Formulation Specification TIP adapter was added. These adapters already exist for many specifications.

Please see the *Agile Product Lifecycle Management for Process Content Synchronization and Syndication Configuration Guide* for details.

CustomerReportExtensions.xml

This file manipulates the behavior within the reporting application and controls navigation to the reporting application.

ReportExtensions/CustomerExtension/ServiceConfig

This is used to configure the maximum number of reports that the web service will run concurrently.

ReportExtensions/CustomerExtension/ServiceConfig/ ParameterTypes

An Entity Query Tool (EQT) model and a webcontrol can be used together to create report parameters which are used by reports defined in the next section

ReportExtensions/CustomerExtension/ReportContexts

Reports can be grouped and defined under a context in this section. This is where the primary definition of a report is registered within the system.

ReportExtensions/CustomerExtension/ReportContexts/ReportContext/ReportGroup/Reports/Report

Defines the name of the report shown in the UI, the location of the report on the report server, and the web service timeout for the individual report.

ReportExtensions/CustomerExtension/ReportingChannels

Navigation to reports is defined given a specified context defined in the previous section.

CustomPluginExtensions.xml

This file allows extensibility to various UI and printing elements through user-supplied .NET assemblies. Commented reference examples are provided in the file to the plugin areas:

- BOMInputItemPlugin
- CSSFormulationExtension
- HasSpecVisibilityPlugin
- CustomNotificationsReaderPlugin
- RelatedActivitySpecNotifierPlugin

CustomUOMLists.config

UOMs are grouped into categories and used throughout the system. When the application uses a particular category for a given object type, it only allows those UOMs defined in this file.

CustomWFAExtensionsConfig.xml

When creating workflow templates, it is sometimes necessary to provide custom guard conditions and workflow actions. Both use .NET assembly classes to execute.

Guard Conditions

The results of these determine if a workflow is allowed.

Actions

Upon a successful workflow operation, this is executed.

EQTSearchablePropertyConfigs.xml

In Entity Query Tool (EQT) searches, properties are used to define constraints on the results. These properties are specified in a list, in which, some properties are used more than others. In this file, you may specify which properties should show at the top of this list and in what order. Model and property names may be found in the reference EQTUIModelDefinitions.xml file.

EQT searching depends on models that have a name and 0 or more properties.

We've removed the "Process Sheet Specification" and the "BOM ProcessSheet Model" models.

The following models have been added:

- Main Product Specification
- Main Menu Item Specification
- Main Trade Specification
- Main Process Sheet Specification
- Main Ingredient Specification
- Main Nutrient Profile
- Main Packaging Specification
- Main Equipment Specification
- Main Printed Packaging Specification
- Main Delivered Material Packing
- Main Packing Configuration Specification
- Main Labeling Specification
- Main Master Specification
- Main Ingredient Specification Model with Output Type Filter
- Spec Sourcing Approval Model
- Non-Spec Sourcing Approval Model

The model named "FCLFoodItem" now specifies a searchable property called "SourceName" which was called "SourceNameSearch".

exportExtensions.xml

The new LegacyCustomSectionExtensibilityHandler is simply the same handler as in 5.2.1. If customers would care to upgrade to the new handler they may do so by using the CustomSectionExtensibilityHandler.

During syndication, for each specification type, the ExtensionItem defines the way in which custom sections are exported.

GSMSpecViews.xml

Allows direct definition of EQT models within GSM. Models are contained by views and allow multiple kinds of searches within the same window if more than one is defined.

Models have three main sections:

Mandatory Property

These are the properties to be used as criteria for any search. They define the operation and the value.

SearchProperties (exclusion)

Defines which properties can be used as restrictive criteria. When specified in the exclusion list and combined with a Handler, the property is no longer available as search criteria

DisplayColumns

Defines which columns will show, how they will look, and in what order they will appear.

MenuConfig-Extensions.xml

This file allows manipulation of how much of menus are built. When building menus, there are three main elements:

Builders

These define what code should perform the building task. They use the other information defined in this file to organize the rendering of the menu.

Pipelines

When rendering a menu element, Pipelines are used to apply decorations. Every Builder has an association to a Pipeline and every Pipeline has one or more Decorator. A Decorator is simply a pointer to a .NET assembly class that performs the decoration on that UI element.

Providers

These are used by Decorators in Pipelines to apply commonly used behaviors or looks to UI elements. There are currently four kinds:

- SecurityProvider
- ItemLookSkinProvider
- ApplicationWideMenuItemLookSkinProvider
- PortalNavLookSkinProvider

PrintSettings.config

The logical definitions of the "PrintConfig" elements under "PrintSettings/GSM/FormattingObjectsMap" have been moved to "PrintSettings/PrintConfigurations/PrintConfiguration" elements.

Printing requires the use of common configurations and managers defined in this file.

PrintConfigurations/PrintConfiguration

A print configuration is defined by a specification type, a model, a print config class, and the various Print Templates available. Each of these Print Templates define a type of file output, a XSL file to use for transformation, and optionally a .NET class for evaluating the template's applicability.

id
This is the identifier for this template within the scope of this Print Configuration.

library
This is a reference to the named library defined in XenoDoc.xml (available in the reference directory).

report
This is the XSL file that will be used to perform the transformation.

printmanager
This is the manager that dictates how the transformation will occur. There are a few predefined types that may be used in addition to those defined in this file: “XML” and “FO”. If this attribute is not defined, the default implicit manager is used to produce a PDF file.

guardCondition
When specified, this determines if the Print Template is available by executing the .NET assembly class specified at the path in this attribute's value.

PrintManagers/PrintManager
A print manager is used by the Print Templates when applying the transformation of the object into the final printed result. To do this it uses Pipes which perform the transformation in steps using a sequence and a .NET assembly class path. Optionally, parameters to these Pipes can be passed using child nodes in the traditional add-value .NET XML fashion.

SiteMap-DisplayOrder.xml

Menu items have a visibility and an order which is defined here. Any 3rd party menu items should also have a sort order defined in this file.

SiteMap-Extensions.xml

This file allows the addition of 3rd party menu items. The schema involves a hierarchical order of MenuItems that allow a translatable label, a security profile, a way to alter the look of the item, and some other advanced options on how menus are displayed.

SLESecurityExtension.config

This file describes the hierarchical nature of the menus in various areas used by the application suite.

In the GSM navigation menu:

- The Process specification menu item was removed and the Formulation specification added in it's place.
- The LIO Profile menu item was added after the Master Specification menu item.
- The Change Management menu item was added after the Activity menu item.
- The Print Administration and Edit User Profile menu items were removed.

In the SCRM navigation menu:

- Below the Facility menu item, the Sourcing Approval menu item was added which contains both specification-related Sourcing Approvals and non-specification-related Sourcing Approvals.

In the EQ:

- As the last menu item, Trade Questionnaires were added.
- From the main menu, the DWB menu item was removed.

In the Data Admin navigation menu:

- Removed the DWB sub-menu item.
- Added a Substitute Restrictions menu item after the Rounding Rules menu item under the Global sub-menu item.
- Added a GSM Packaging UOM menu item after the Nutritional Origin menu item.
- In the specification Category navigation menu, added the Formulation Specification menu item before the Ingredient Specification menu item the and removed the Process Specification menu item.

Custom Portal:

- The Custom Portal navigation menu was added after the WFA navigation menu:
- Added the Custom Portals and Custom Portal Views menu items.

Translation Extension

The data in the translation cache hierarchy used to provide proactive translations is part of the core product. We rely on it being identical across all customers. While customers can change various translations through a customer override, they cannot add translations to a cache.

The inability to add translations to a particular cache is normally not a problem as customers do not modify the calling code to access additional translation items.

In cases where our customers do require the ability to add items to a translation cache the **Translation Extension Service** is used.

From the users perspective, the extension service is very simple. Adding a translation to a cache requires inserting data into two tables: the `commonXLAExtensionCache` (which provides a reference to the cache being extended) and `commonXLAExtensionCacheItem` (which allows addition of translation items).

In order to add a translation to a given cache "ApplicationMenu/TopMenu", one must first add a reference to the cache being extended. This is done via the `commonXLAExtensionCache` table:

```
INSERT INTO commonXLAExtensionCache (pkid, Name,
InheritFrom, Category)
 VALUES ('1058a353732a-61a1-43f9-aa10-f6d0d8a41895'),
 'Root/TranslationCache1', 'Root/TranslationCache1',
 'ApplicationMenuExtensions')
```

Next, we need to add a translation item to the cache:

```
INSERT INTO commonXLAExtensionCacheItem (pkid, fkParent,
langID, Id, Value)
 VALUES ('1059a353732a-61a1-43f9-aa10-f6d0d8a41895',
 '1058a353732a-61a1-43f9-aa10-f6d0d8a41895', 0,
 'newTranslationLookupName', 'Translation Value -
 English')
```

At this point, customers can reference translation item 'newTranslationLookupName' in cache 'Root/TranslationCache1'.

Note The translation extension service is not automatically enabled throughout the application. It is enabled in certain areas such as printing and the navigation menus.

This defines skin profiles specific to the Component Art Navigation items, which use ItemLooks to define the way navigation controls look. When a menu or menu item is configured with an item look, the LookId property is very important and all the properties are case sensitive. Every Skin can have only a finite set of ItemLooks, and the LookId determines the look of the menu items in various situations.

Valid LookIds for Top-Level Menus:

DefaultChildSelectedItemLook

DefaultDisabledItemLook

DefaultItemLook

DefaultSelectedItemLook

Valid LookIds for MenuItems:

```
ChildSelectedLook
DefaultSubItemChildSelectedLook
DefaultSubItemDisabledLook
DefaultSubItemLook
DefaultSubItemSelectedLook
DisabledLook
Look
SelectedLook
```

Syntax for Setting Properties

All parameters that are picked up from context supplied to the MenuBuilderService are of the form `${variableName[,defaultValue]}`.

ValidationSettings.xml

This file defines validation methods for different types of validation used throughout the system.

A new email validator was added called “EmailAddressString”. This uses a regex to verify that an email is at least syntactically correct.

Further, example configurations have been added to give a better picture of the schema of this file. These are embedded as comments and do not affect the configuration.

Some system events are exposed to this file for custom validation. By adding Rules, the validation may or may not allow the action to occur. Each Rule defines a type (usually the specification type) and one or more conditions. These conditions define an event and the specific criteria for the event to pass. The most commonly used type of criteria is the ReflectiveRequiredValidator which, when given a property on the object, tests whether it has been defined or not. This is useful when it is necessary to require a user to fill in a field before allowing them to save or workflow.

APPENDIX B
Deprecated Configurations

This appendix contains a list of configurations that have been deprecated in Agile Product Lifecycle Management for Process.

Deprecated Configurations

Activity Types

The following activity types have been removed from CustomerSettings.config:

- Document Collaboration Summary
- Attachments Summary

Adding the following XML enables the "Legacy Document Collaboration Summary" activity:

```
<ActivityType pkid="3221F0E0DE22-97BC-4ECA-B696-
AF2ABFB3D312">

              <SummaryUserControl url="DocumentCollaboration/
DocumentCollaborationSummary.ascx"
TranslationID="ctlDocumentCollaborationSummary" />

</ActivityType>
```

Adding the following XML enables the "Legacy Attachments Summary" activity:

```
<ActivityType pkid="32219BFA1704-2C10-4918-9E06-
7DE3A69D7A01">

           <SummaryUserControl url="AttachmentsSummary.ascx"
TranslationID="ctlAttachmentsSummary" />

</ActivityType>
```

Design Workbench (DWB) Configurations

The Design Workbench application and related configurations have been deprecated. This functionality is now supplied through formulation specifications. See the *Agile Product Lifecycle Management for Process Global Specification Management User Guide* for more information.

Notes Integration

`NotesIntegration` has been removed from ProdikaSettings.

Printed Packaging Markings

Markings on Printed Packaging are being deprecated. You should now use custom data for this information.

A new configuration has been added to the customer settings file called "GSM.PrintedPackagingSpec.Markings.Enabled".

When the configuration is set to 'True', the Markings tab displays. When the configuration is set to 'False,' the Markings tab is removed from the application. The default value for the new configuration is 'True.'

Product Fact Sheets

The Product Fact Sheet supporting document and system owned rounding rules are being deprecated. Users will now use custom sections and print templates. We added "GSM.NutrientProfile.CustomPanels.Enabled" with a default of "false." This configuration allows the user to configure rounding rules and product fact sheets on nutrient profiles. The following items are removed from the system:

- The Product Fact Sheet link is removed from the Supporting Documents tab of trade and menu item specifications.
- The Final Value column is removed from the Nutrition Panel tab of a nutrient profile.
- The rounding rules selection dialog is removed. The Per Serving column remains, but the header will not be linked to the rounding rules.

RAP

The following RAP configuration has been deprecated:

```
SuiteApplication sortOrder="7" name="RAP"
UserDOHasAccessProperty="HasRAPAccess"
```

Relationship section, Trade Specifications

The Relationship section in trade specifications has been turned off and will be deprecated. Users should move their data to the Associated Specs control.

Section Level Editing, WFA

The management of Section Level Editing in WFA is being deprecated. Section Level Editing rules can now be managed outside of WFA and workflow status.

Through an extension point, custom validation rules can be created to control edit access of GSM sections. For example, a rule can be written to turn of editing of specific sections based on UGM user group and specification category, regardless of workflow status. Previously a specification had to resolve to a workflow before section level editing rules would be applied. This allowed the user to edit restricted sections when a user created, copied or issued a specification.

By default, Section Level Editing in WFA will be turned off. All legacy section level editing rules in WFA need to be migrated to a new validation rule.

Services

The following services have been deprecated:

`HideHRLAccessLinkOnReferencesTab`