Agile Product Lifecycle Management for Process

Document Reference Library User Guide

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June 2012

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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/technetwork/documentation/agile-085940.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/.

If you need additional assistance or information, please go to http://metalink.oracle.com or phone 1.800.233.1711 for assistance.

Before calling Oracle Support about a problem with an Agile PLM for Process manual, please have the full part number, which is located on the title page.

TTY Access to Oracle Support Services

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

Accessibility of Code Examples in Documentation

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

Accessibility of Links to External Web Sites in Documentation

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

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	DRL User Guide	PLM Admin. Guide	Release Notes	Agile training	Help Desk	Agile sales rep
Administering Agile PLM for Process		●		●		
Cache management		●				
Core data management		●				
Creating documents	●					
Custom data management		●				
Document catalogs	●			●		
Feature requests					●	●
Installing Agile PLM for Process				●		●
Known issues			●			
New in this release			●	●		●
Resolved issues			●			
Searching for documents	●					
Supplier document access	●					
System-based roles		●				
Technical support					●	
Using the DRL application	●			●		

Document Conventions

The following formatting elements are used 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

Introducing Document Reference Library

This document provides an overview of Agile Product Lifecycle Management for Process Document Reference Library. Topics in this chapter include:

- *Document Reference Library Application*
- *Getting Started with Document Reference Library*

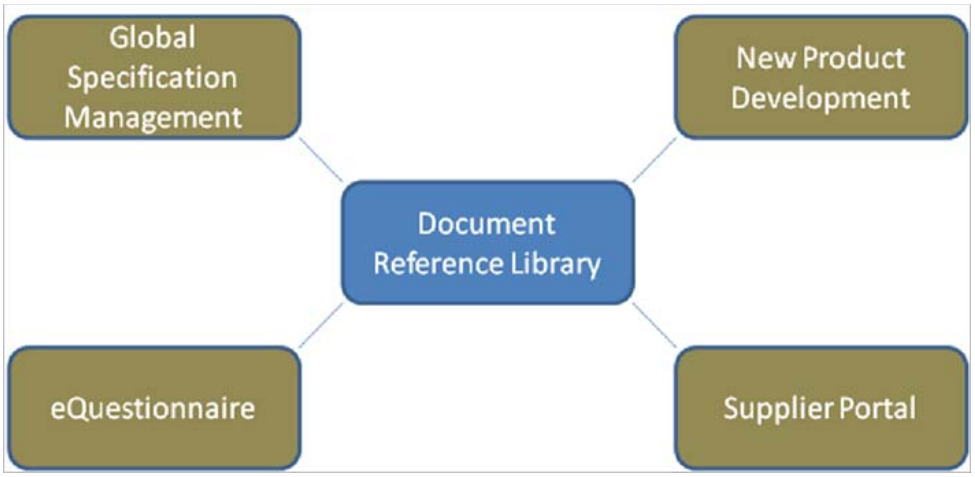
Document Reference Library Application

You can use Document Reference Library (DRL) as a central repository for storing and sharing key corporate and industry-related documentation. Additionally, you can use DRL to catalog and publish documents both internally and to the Supplier Portal application. You determine who can see and modify a document by setting the association between a document and its catalog.

You can browse or search the catalog hierarchy using key document attributes such as document name, attachment title, originator, and status.

As figure 1-1 shows below, DRL is built on an architecture that has enabled it to plug into other Agile PLM for Process products. You can associate DRL documents to many Agile business objects within these products, such as Global Specification Management (GSM) specifications, New Product Development (NPD) projects, and eQuestionnaire (eQ) questionnaires.

Figure 1-1: DRL interacts with several other Agile Product Lifecycle Management for Process applications



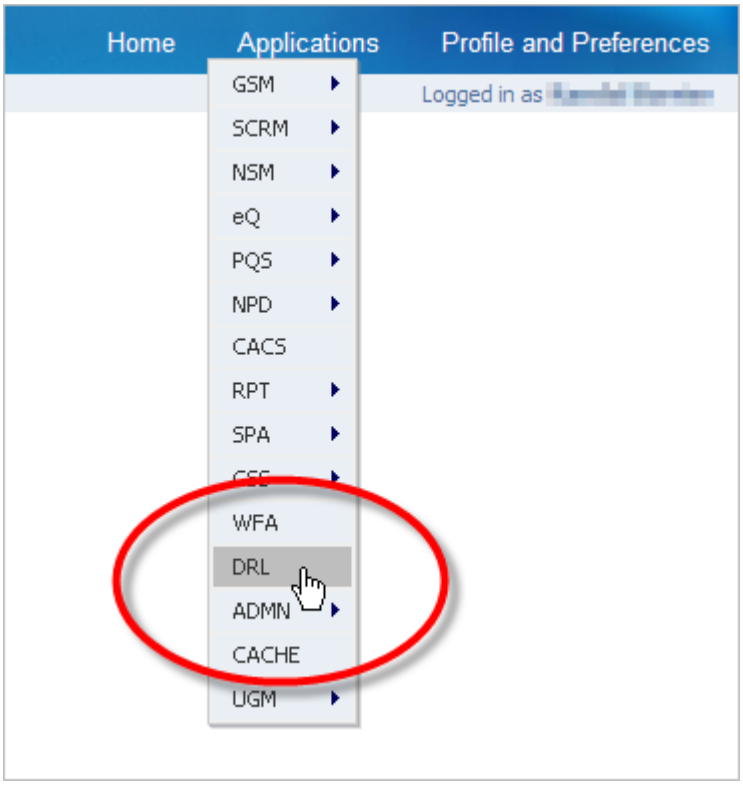
Getting Started with Document Reference Library

To access the Document Reference Library application, select **DRL** from the left navigation panel as shown in figure 1-2 below, or select **DRL** from the Applications menu of the top menu bar, as shown in figure 1-3.

Figure 1-2: DRL on the left navigation panel



Figure 1-3: DRL on the Applications menu of the top menu bar



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

CHAPTER 2

Using Document Reference Library

This chapter describes the capabilities and uses of the Document Reference Library application. Topics in this chapter include:

- *Document Catalogs*
- *Document Visibility*
- *DRL Application*
- *Creating a New Document*
- *Viewing a Document*
- *Creating a Copy of a Document*
- *Supplier Portal*
- *Linking to Document Reference Library from Other Applications*

Document Catalogs

You can use document catalogs to organize and provide visibility to documents. Administrators create and manage catalogs using the Data Administration application. Administrators can create as many catalogs as needed.

Catalogs consist of a root node with one or many child nodes. Each child node can also contain one or many other child nodes. In this hierarchical structure a node can have one parent and many children.

Once the catalog is defined, you can use it within Document Reference Library (DRL) and other Agile Product Lifecycle Management for Process applications that use DRL. Within the DRL application, if you have the appropriate role (set by your Agile administrator), you can assign documents to one or many catalog nodes, regardless of where that node lives in the hierarchy. See example 2-1, *DRL catalog, global portal (root node)* on page 2-2 and example 2-2, *DRL catalog, supplier portal (root node)* on page 2-2 for examples of two catalogs.

Example 2-1: DRL catalog, global portal (root node)

Global portal (root node)
- North America
  - USA
  - Canada
  - Mexico
- Europe
  - Italy
  - France

Example 2-2: DRL catalog, supplier portal (root node)

Supplier portal (root node)
- North American beef suppliers
  - US beef suppliers
  - Canadian beef suppliers
  - Mexican beef suppliers
- European beef suppliers
  - Italian beef suppliers
  - French beef suppliers

Document Visibility

The ability of a user to view a document is determined by the user's association to a catalog node. Administrators use the User Group Management application to define an internal user's association with a catalog node. Document visibility for a company is defined in the Supply Chain Relationship Management application on the DRL Catalog tab.

Once your administrator has defined your catalog node associations, you have visibility to all documents associated to catalog nodes beneath your associated node, as well as the documents associated to nodes directly above your associated node all the way to the root node.

For example, if you were associated to the "North America" node in example 2-1, above, you would have access to all documents in the "USA," "Canada," and "Mexico" nodes as well as any documents in the "global portal" node. You would not have access to the "Europe" node.

DRL Application

In the Document Reference Library (DRL) application, you can view documents by searching and browsing the catalog hierarchy. You can also create and update documents.

Document Access Rights

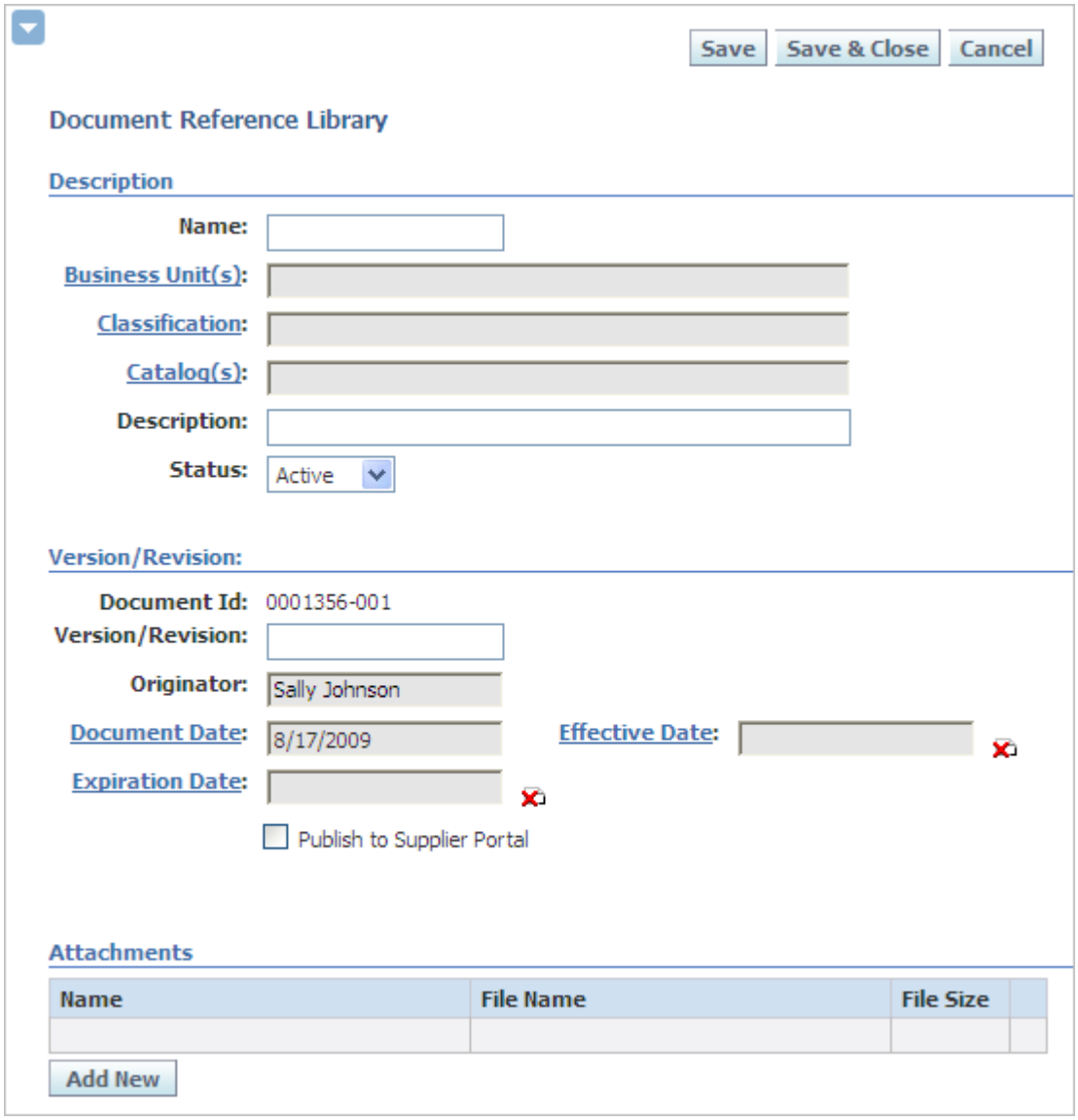
Your user account must have certain roles, assigned to you in the User Group Management application, in order to read, edit, and create DRL documents. Once these roles have been assigned (by your administrator), you will have access to documents based on the rules defined in *Document Visibility* on page 2-2 of this guide.

Creating a New Document

To create a new document in the DRL application:

1 Click **Create New Document** at the top right of the page. The Document Reference Library page displays a new document, as figure 2-1 shows below:

Figure 2-1: Document Reference Library page



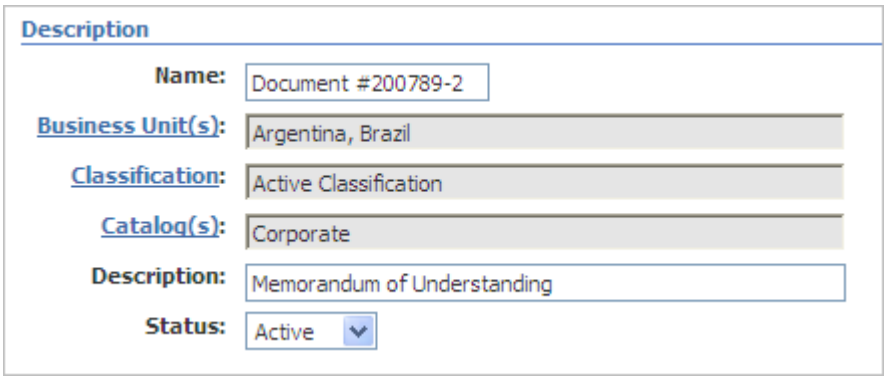
This page contains three sections:

- Description
- Version/Revision
- Attachments

Description Section

Use the Description section, shown in figure 2-2 below, to provide high-level information about the document.

Figure 2-2: Description section



Key fields include:

Name—The title that users will see when viewing the document. This is a required field

Business Unit(s)—The business unit assigned to the document. This is a required field. Multiple business units can be associated to the document. This does not affect its visibility.

Classifications—The classification of the document. Multiple classifications can be associated to the document. This is just for informational purposes.

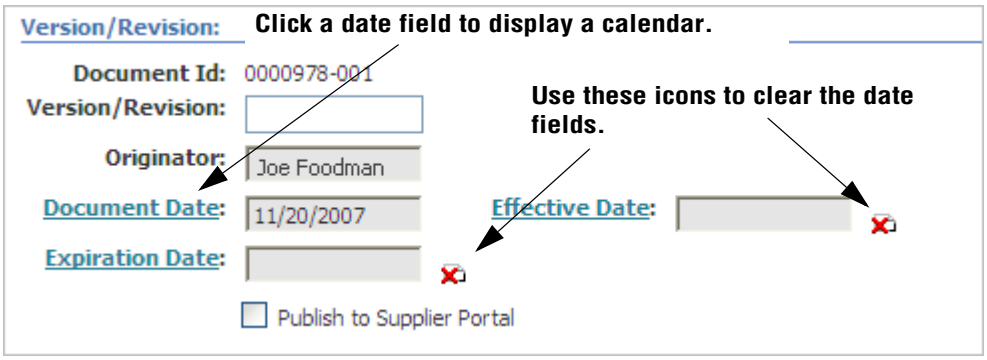
Catalog(s)—The catalog the document is assigned to. This is a required field. This will impact its visibility.

Status—The status of the document. Valid values are "Active" and "Inactive." "Active" is the default. Inactive documents will not appear in other applications unless the document is already associated with a business object in that application. Therefore, you cannot associate an "Inactive" document with a specification in Global Specification Management, but if you change the status to "Inactive" after it has been associated to the specification, the inactivated document will remain associated and viewable.

Version/Revision Section

Use the Version/Revision section, shown in figure 2-3 below, to track versions and revisions of the document.

Figure 2-3: Version/Revision section



Key fields include:

Document Id—The document ID assigned by the system. The first seven digits represent the unique ID of the document. The last three digits represent the version of the document.

Version/Revision—Describe the reason for the revision of the document.

Originator—The name of the user who created the document. This field is assigned by the system and cannot be updated.

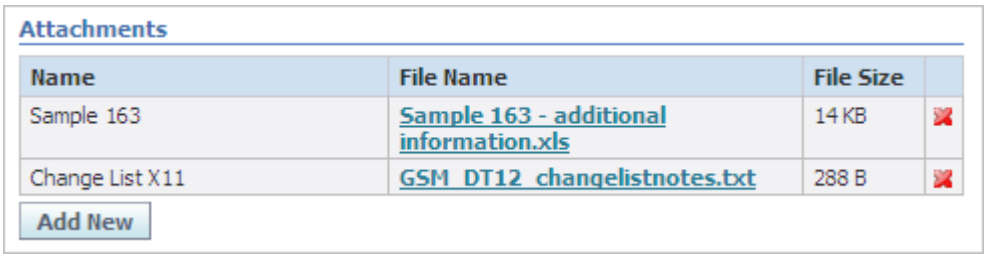
Document Date—The date for the document. This field is populated with the current date. You can update it.

Publish to Supplier Portal—Publish the document to the Supplier Portal application. The Supplier Portal user will have to be associated to a company that has access to one of the catalog nodes associated to this document.

Attachments Section

Use the Attachments section, shown in figure 2-4 below, to add an attachment to the document. A DRL document may contain one or many file attachments.

Figure 2-4: Attachments section



An attachment consists of the following data:

Name—The title of the attachment

File Name—The file name of the attached file

File Size—The size of the attached file

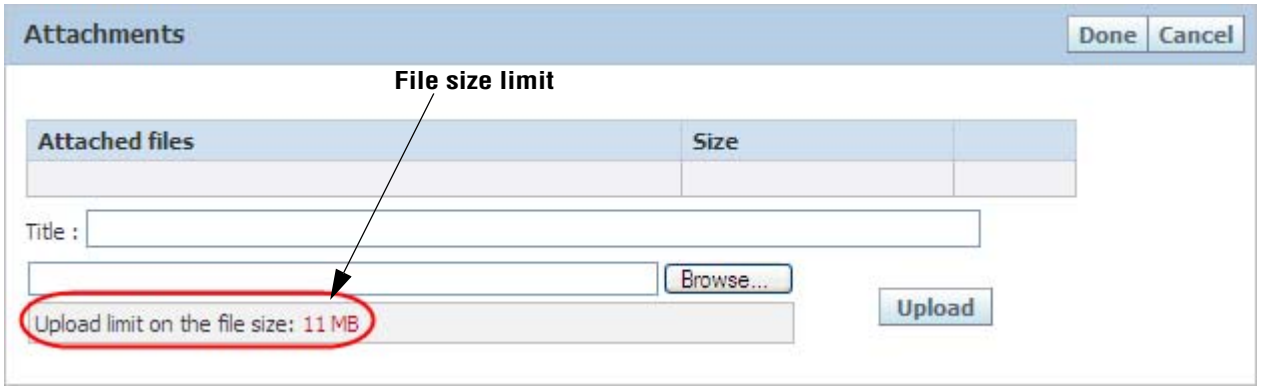
Note There is a limit to the file size that you can upload. This limit varies, depending on the system configuration. DRL displays the limit in red at the bottom of the attachment dialog. See figure 2-5 for an example.

Adding an Attachment

To add an attachment:

1. Click **Add New**. The Attachments dialog box displays, as figure 2-5 shows:

Figure 2-5: Attachments dialog box



2. Enter the title of the attachment in the **Title** field.
3. Attach the file by clicking **Browse** to search for the file, and then click **Upload**. The name of the file that you added appears in the Attachments table at the top of the page.
4. Click **Done** to close the dialog box, or add more attachments by repeating steps 2 and 3.

When you have provided all information for the document, click **Save** at the top right of the page to save the document to DRL.

Deleting an Attachment

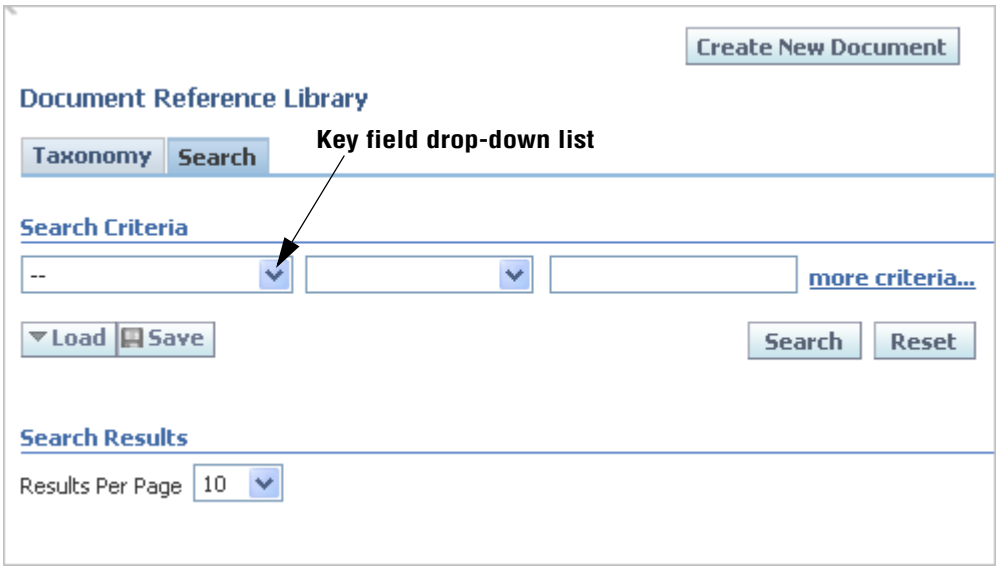
To delete an attachment:

1. From the Document Reference Library page, click **Edit** at the top right of the page to display the page in edit mode.
2. In the Attachments table, click the delete icon ( ) next to the file to remove. DRL removes the row from the table.
3. Click **Save & Close**.

Viewing a Document

To view a DRL document, select **Document Search** from the left navigation panel. The Document Reference Library search page displays. It contains two tabs, Taxonomy and Search, as figure 2-6 shows below.

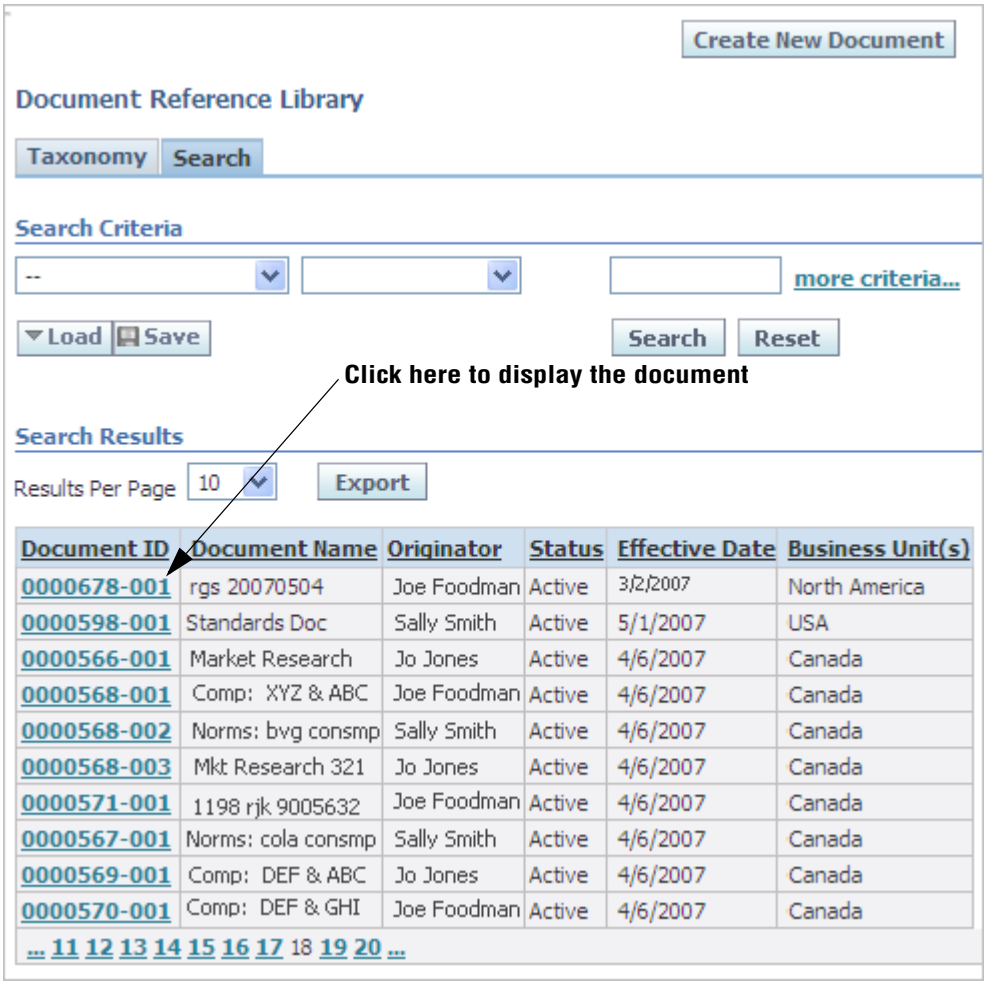
Figure 2-6: Taxonomy and Search tabs



Searching Using the Search Tab

Use the Search tab to search for a document based on certain document attributes, such as document name, classification, or attachment title. Select these attributes from the key field drop-down list, shown in figure 2-6. The search results will include only documents that you have access to, based on your catalog association. Figure 2-7 below shows search results. To view a document in a search results list, click the hyperlinked **Document ID** in the first column.

Figure 2-7: Returned search results



Browsing Using the Taxonomy Tab

Use the Taxonomy tab to browse the catalogs that you have access to. DRL displays the catalogs in a hierarchical format. Each catalog node has an expand node icon (⊞) to its left; documents do not. When you select a node, the taxonomy tree displays its children below the node. When you select a document, DRL displays the document description, version/revision section, and links to any attachments on the Document Reference Library page.

Creating a Copy of a Document

You can create a copy of a document from within DRL. To create a copy of a document, open the source document to be copied and click **Create Copy** at the top right of the page. Document Reference Library displays the Copy Options dialog box containing four options:

Create Copy WITHOUT attachments—Create a new document with the header information copied but without the attachments.

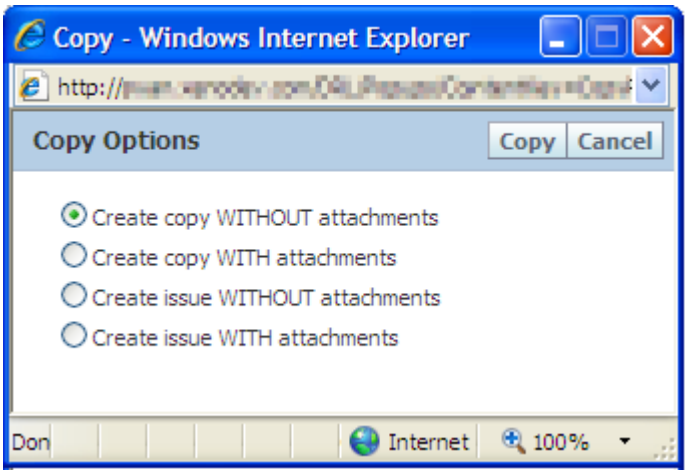
Create Copy WITH attachments—Create a new document with the header information copied as well as the attachments.

Create Issue WITHOUT attachments—Create a new version of the document with the header information copied but without the attachments.

Create Issue WITH attachments—Create a new version of the document with the header information copied as well as the attachments.

Figure 2-8 shows the Copy Options dialog box:

Figure 2-8: Copy Options dialog box



Select one option and then click **Copy**. The Document Reference Library page displays with fields that are populated based on the option that you chose. The Document Id field displays a new, unique number.

Supplier Portal

Suppliers who are approved to use Supplier Portal can browse document catalogs. They can also view details of those documents with the **Publish to Supplier Portal** option selected. For more information about the Supplier Portal, refer to the *Agile Product Lifecycle Management for Process Supplier Portal User Guide.*

Access Rights

Suppliers can view catalogs based on the catalog nodes that have been assigned to their company. This assignment is set within Supply Chain Relationship Management (SCRM), on the DRL Catalog tab of the company profile. For more information on SCRM, refer to the *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide.*

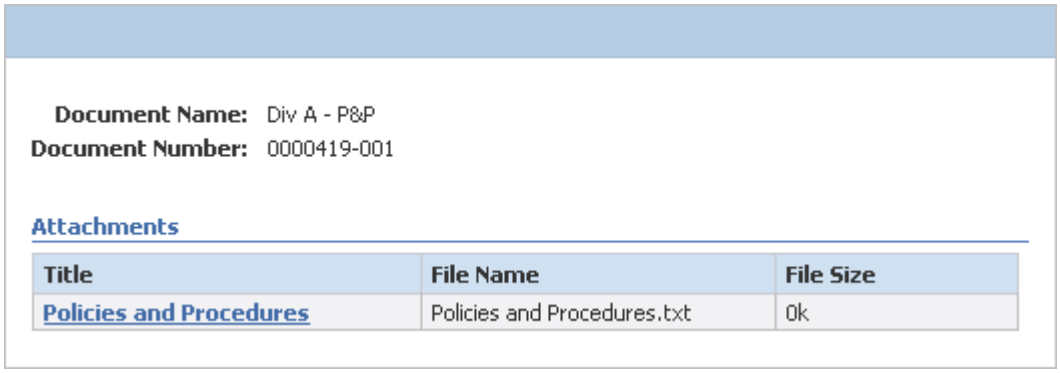
Browsing the Document Catalog

To browse the document catalog from Supplier Portal, select the **DRL** link from the home page. You can select a catalog node to expand the node and display its children, as shown in figure 2-9 below. Selecting a document will open a dialog box that displays the document name, document number, and attachments table, as shown in figure 2-10.

Figure 2-9: Expanded node in Supplier Portal



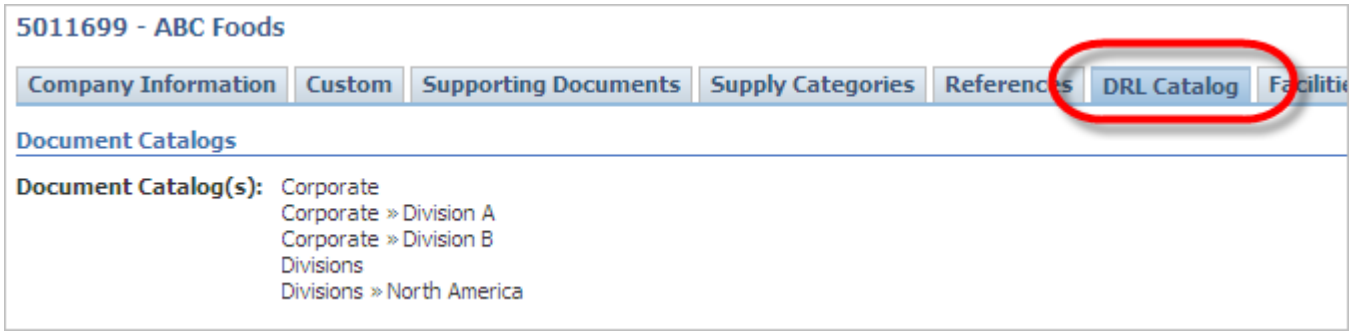
Figure 2-10: Selected document in Supplier Portal



Linking to Document Reference Library from Other Applications

In Global Specification Management (GSM), New Product Development (NPD), Supply Chain Relationship Management (SCRM), and eQuestionnaire (EQ) you can attach DRL documents and catalog nodes to core business objects, such as specifications, projects, companies, and questionnaires. These objects include a DRL Documents section or tab on which you can associate the documents to the respective business object. Figure 2-11 below shows the DRL Catalog tab of a company created in SCRM.

Figure 2-11: SCRM business object



Attaching Documents

When you attach a document to an entity such as a specification, the updates to the document from within DRL will be reflected in the specification. If the document is versioned, the new version will not be associated to the specification. To associate the new version to the specification, detach the old version of the document and then attach the new version.

Attaching Catalog Nodes

You can associate a catalog node to an entity such as a specification. By associating a node, you can link the entity to many attachments at once. Since catalog nodes are not versioned, any changes to that node will be reflected wherever that node is used.

You may wish to use this feature to ensure that the latest version of a document is attached to a business object. To do this, you must maintain a node with the latest versions and then attach that node to the desired object.

Caution! While using this feature can be an advantage for ease of maintenance, it can also be a risk, because an approved specification can have its associated documents unexpectedly change.

Access Rights

All users see the same entries in the DRL Documents section regardless of access rights. Once you click a catalog or document, the system checks your access rights. If you do not have access, you will receive a message notifying you that you cannot access the document or catalog.

If you have access to the catalog that you click, you can view all documents and child catalog nodes. If you have access only to child catalog nodes within the catalog that you click, your view will be limited to what you have access to.