Oracle® Agile Product Lifecycle Management for Process

Action Dashboard Solution Pack

Extensibility Pack 3.0

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Agile Product Lifecycle Management for Process

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Action Dashboard

Purpose

This guide describes how to install, configure, and use the Action Dashboard Solution Pack.

Solution packs are designed to be pluggable modules that can be added to the Agile PLM for Process application suite without modifying the existing release code base.

Overview

The Action Dashboard provides a central location to visually display all of a user's GSM, SCRM, NPD, PQM, and eQ action items and their status. The Action Dashboard is deployed to the Portal application accessible through a tab.

Multiple views of data are presented to quickly show relevant data to the user:

- The **Red, Amber, Green** view allows a user to know which items are late based on the due date (Red), which items need attention (Amber), and all other items they currently own (Green).
- The **Recent, New, Due** views allow a user to see the action items they recently viewed (Recent), which items have been newly assigned to them (New), and which items are about to be Due or past due(Due).

Installing the Action Dashboard

Note: Before installing the Action Dashboard, you must have Oracle Agile PLM for Process 6.1.1.0.0 installed.

To install the Action Dashboard:

1. Unzip the contents of Extensibility Pack 3.0.
2. Unzip the contents of the SolutionsPack\ActionDashboard\ActionDashboard.zip file and note the location.

Database Setup

1. Create a backup of the Prodika database.
2. Apply the database scripts.
    a. SQL Server
        i. Open a command prompt and navigate to the directory where you unzipped the solution pack.
        ii. Change directories (cd) to the Database directory.
        iii. Apply the scripts using the following calls to the ApplyScripts.exe utility:

```
ApplyScripts –c "server=<database_server>;uid=<user>;
password=<password>;database=<database>" –f ActionDashboard.xml
```

        iv. After the ApplyScripts call, you can confirm that the database scripts have been applied successfully when the system prompts you with the following message: "Complete – with no errors".
    b. Oracle
        i. Open a command prompt and navigate to the directory where you unzipped the solution pack.
        ii. Change directories (cd) to the Database directory.
        iii. Apply the scripts using the following calls to the ApplyScripts.exe utility:

```
ApplyScripts –c "User Id=<user>;Password=<password>; Data
Source=<datasource>" –dbvendor="orcl" –f ActionDashboard-orcl.xml
```

        iv. After the ApplyScripts call, you can confirm that the database scripts have been applied successfully when the system prompts you with the following message: "Complete – with no errors".

Application Installation

1. Run the ActionDashboard.exe file from the location where you unzipped the solution pack and follow the onscreen instructions to install the necessary files to your specified PLM for Process directory.

   A backup folder called SolutionPacks611Backup is created during the installation to facilitate the uninstall process. Inside of that folder, a new folder called ActionDashboard is created to hold the files that were changed during the installation.

2. **OPTIONAL:** Update the <prodika_home>\config\Custom\CustomerSettings.config file if you want to modify the default values for MaxItemsActionDashboard, ActionDashboardCacheTimeoutInMins, IsPortalHomeDefault, and HideTabId.

   - MaxItemsActionDashboard: The maximum records the Action Items will return. If it is not set, the default value is 500.
   - ActionDashboardCacheTimeoutInMins: The service cache timeout duration in minutes. If it is not set, the default value is 5 minutes.
   - IsPortalHomeDefault: Defines which Portal page tab is the default. Out of the box, the default is the new Action Dashboard tab. If it is changed to true, the default page will be the user's existing portal page.
   - HideTabId: Defines which Portal page tab is hidden. HomeTab and ActionDashboardTab are the only options.

   Here is an example of what this would look like:

```
<ProdikaSettings>
        <ActionItems configChildKey="key">
                <add key="MaxItemsActionDashboard" value="5000"/>
                 <add key="ActionDashboardCacheTimeoutInMins" value="3"/>
                <add key="IsPortalHomeDefault" value="false"/>
                <add key="HideTabId" value="HomeTab"/>
         </ActionItems>
</ProdikaSettings>
```

3. Restart IIS.

4. Login to the application.

Using the Action Dashboard

After the Action Dashboard has been installed and configured, log in to the PLM for Process Portal. You can also access the Action Dashboard from the following URL:

http://<prodika_home>/portal/default.aspx?InitialLoad=ActionDashboard

This URL can be added to any navigation menu using navigation extensions. This would provide users a one-click method to return to their Action Dashboard if it is not configured as the default home page. See the *Navigation Extensibility Guide* in the extensibility pack for more information.

The red, amber, green (RAG) view displays the user's GSM, SCRM, NPD, PQM, and eQ action items. They are organized by status. Red items are past due, amber items are running behind schedule and about to turn red and green items are current.

The left bar represents a stacked bar chart. It displays the total count of red, amber, and green items. You can quickly see how many items are past due or about to be due. Click the sections of the chart to display a list of the action items in that selected status.

By default, the first action items displayed are past due items.

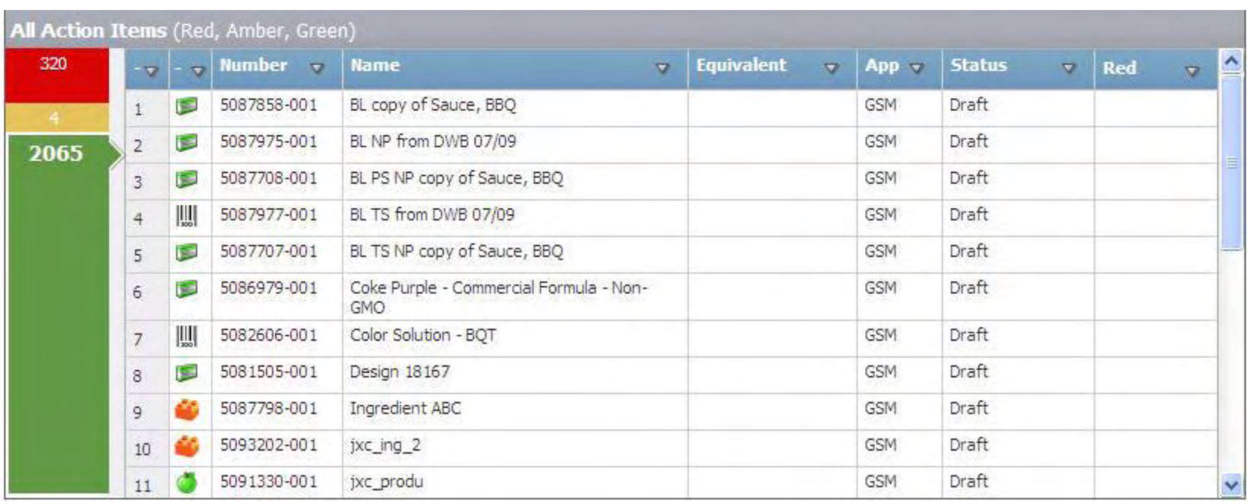


Figure 1. All Action Items in Green

The Action Dashboard table contains the following attributes:

Action Dashboard table columns	**Description**
Sort order	Click the first column to return to the original sort order.
Type	The object icon associated with each item type. Hovering over each icon will display the type

Action Dashboard table columns	Description
	description.
Number	The number associated with each item. **Note:** Not all items have a number in the system. For those items, a number will not be displayed.
Name	The name of the item.
Equivalent	The preferred Cross Reference for the user. For Spec Related Sourcing Approvals (SAC), the assigned reference that is selected on the SAC displays. If this field is blank, the preferred Cross Reference for the user displays.
App	The application associated with the item.
Status	The current workflow status of the item.
Red	The date the item will be entering the red state

Click anywhere in the row to open the item.

Cached Data

The action item data retrieved is cached for performance purposes. If you act on an action item, then return to the Action Dashboard and do not see your change reflected, you can click the **Refresh** link to update the table contents. By default, data is cached for 5 minutes, but this can be overridden by updating the configuration value as indicated in the installation instructions.

Recent, New, and Due Views

The following list gives different views of the action items listing. Click the **Recent**, **New**, or **Due** button to display the corresponding view.

- **Recent** – These are items you own and have recently accessed. This is available as long as the Most Recently Used functionality is enabled (the application default is enabled).
- **New**—You should think of this list as your inbox. These are items that have been recently assigned to you through a workflow. By default, this includes items that have been assigned to

you in the last 7 days, but an input field allows that to be modified (type the new number and press Enter).

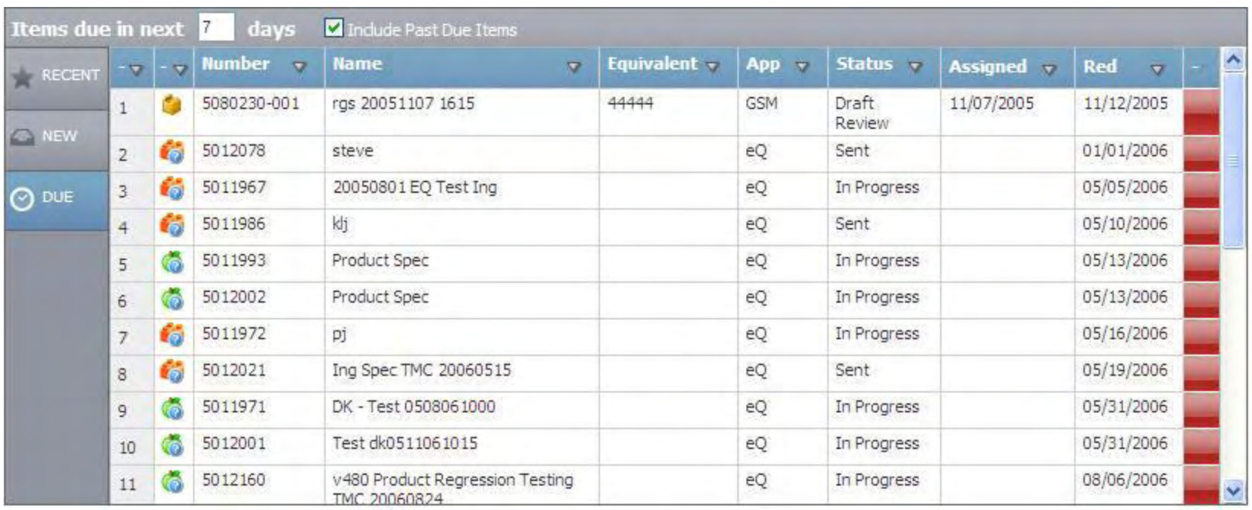
eQ: New eQ items include all eQs in Submitted status that have not been imported into GSM. The assigned date field displays the date the supplier returned the item.

NPD: If the Current Stage's Start Gate Date is set, the Current Stage's Start Date is used as the project assigned date.

- **Due**--This list helps you to understand what is coming due in the next specified amount of days. This list allows you to plan ahead based on their respective due dates. By default, this includes items that will turn Red in the next 7 days and past due items. An input field allows the number of days to be modified (type the new number and press Enter). This listing also includes items that are already past due (in a Red status); uncheck the Include Past Due Items checkbox to only show items that will be due between today and the number of days specified.

  eQ: Due eQ items include all eQs in Sent or In Progress status. The assigned date field is blank.

  NPD: The assigned date is the Last Workflow Action Date.



	Number	Name	Equivalent	App	Status	Assigned	Red
1	5080230-001	rgs 20051107 1615	44444	GSM	Draft Review	11/07/2005	11/12/2005
2	5012078	steve		eQ	Sent		01/01/2006
3	5011967	20050801 EQ Test Ing		eQ	In Progress		05/05/2006
4	5011986	klj		eQ	Sent		05/10/2006
5	5011993	Product Spec		eQ	In Progress		05/13/2006
6	5012002	Product Spec		eQ	In Progress		05/13/2006
7	5011972	pj		eQ	In Progress		05/16/2006
8	5012021	Ing Spec TMC 20060515		eQ	Sent		05/19/2006
9	5011971	DK - Test 0508061000		eQ	In Progress		05/31/2006
10	5012001	Test dk0511061015		eQ	In Progress		05/31/2006
11	5012160	v480 Product Regression Testing TMC 20060824		eQ	In Progress		08/06/2006

Figure 2. Action Dashboard showing items due

Sorting Views

To sort by a specific attribute, click the table column header to display the Sort panel. Click the sort order. All columns can be sorted in ascending or descending alphanumeric order.

Figure 3. Sort Panel

A down arrow in the column heading indicates descending order, and an up arrow indicates ascending order. The selected sort order is preserved within the session. The default sort view for all items in the RAG grid is in ascending order by red date so the oldest items are displayed first.

Filtering Views

You can filter the Type, App, and Status columns to display only those items that meet the criteria you specify and hide the items you do not want displayed. You can also filter by more than one column. Each additional filter is based on the current filter, so the number of items displayed is further reduced.

To filter the items in a column:

1. Click the table column header to display the Sort and Filter panel.
2. Select or clear one or more filter values. If the list is large, clear **Select All**, then select the specific values to filter.
3. Click **OK** to display the filtered items.

When a column is filtered, the filter icon ( ) displays in the column header.

-	-	Number	Name	Equivalent	App	Status	Accessed	Red	-
1		5106463-001	Breaded Chicken Patties		GSM	Draft	06/11/2012		
2			ISP Action Dashboard - Amber TMC 20120423		NPD	Idea Review	04/26/2012	09/11/2039	
3		5106462-001	Breaded Chicken Patties		GSM	Draft	06/11/2012		
4		5106461-001	Breading		GSM	Draft	06/11/2012		
5		5106458-001	Onion Salt Blend		GSM	Draft	06/11/2012		
6		5106459-001	Chicken Breast Sliced - Raw		GSM	Draft	06/11/2012		
7		5106460-001	Olive Oil - Cold Pressed		GSM	Draft	06/11/2012		
8		5093566-001	Breakdown Test		GSM	Draft	06/08/2009		
9		5106437-001	Testing Density		GSM	Draft	05/29/2012		
10		5080230-001	rgs 20051107 1615	44444	GSM	Draft Review	11/07/2005	11/12/2005	
11		5004423	mrj		NPD	Stage 3 -	07/07/2011		

Figure 4. App Column with filter

When there are one or more filters selected on the grid, the Clear Filters link appears. Click **Clear Filters** to remove all filters from that grid.