Oracle® Agile Product Lifecycle Management for Process

Maintenance Pack Installation Guide

Release 6.1.1.6

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Oracle Agile Product Lifecycle Management for Process Maintenance Pack Installation Guide, Release 6.1.1.6

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Preface

The *Agile Product Lifecycle Management for Process Maintenance Pack Installation Guide* contains instructions for installing Oracle Agile Product Lifecycle Management (PLM) for Process maintenance packs.

This preface contains these topics:

- Audience
- Documentation Accessibility
- Documentation Accessibility
- Software Availability
- Related Documents
- Conventions

Audience

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

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Software Availability

Oracle Software Delivery Cloud (OSDC) provides the latest copy of the core software. Note the core software does not include any patches, Patch Rollups, or Maintenance Packs. Access OSDC at:

http://edelivery.oracle.com.

Related Documents

For more information, see the following document in the Agile PLM for Process Release documentation set:

- *Agile Product Lifecycle Management for Process Release Notes*. Up-to-date Release Notes and other documentation are posted on Oracle Technology Network (OTN) at this location:

  http://www.oracle.com/technetwork/documentation/agile-085940.html#plmprocess

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Installation Requirements

This chapter provides requirements that should be met prior to installation of Agile PLM for Process. Topics in this chapter include:

- Checking for Latest Information and Instructions
- Installation Requirements

Checking for Latest Information and Instructions

Prior to installation please refer to the following URLs for the latest information and instructions:

1. Oracle Software Delivery Cloud: http://edelivery.oracle.com/. Oracle Software Delivery Cloud provides the latest copy of the core software. Please note the core software does not include any patches, Patch Rollups, or Maintenance Packs. You can obtain a copy of a previous release version by contacting Customer Support at https://support.oracle.com/.

    a. Select appropriate language and click **Continue**.

    b. Complete the export validation requirements form.

    c. Select "Oracle Agile Applications" as the Product Pack.

    d. Select "Microsoft Windows x64 (64-bit)" or "Microsoft Windows (32-bit)" as the Platform.

    e. Click **Go**.

    f. Search for "Oracle Agile Product Lifecycle Management for Process 6.2.0.0.0 Media Pack" in Results and select link.

    g. Download the appropriate media packs.

2. Oracle Support: https://support.oracle.com. Oracle Support provides the latest patch releases and hot fixes. To gain access to the latest patches and hot fixes perform the following steps:

    a. Log into https://support.oracle.com. If you do not have a user ID please contact Oracle Support.

    b. Select a language from the **Language** drop-down, and then click **Sign-In**.

    c. Go to Patches & Updates.

    d. Under **Patch Search**, click "Product or Family (Advanced Search)".

        – Product is "Oracle Agile Product Lifecycle Management for Process."

- – Release is "{The release you are interested in}", i.e. "Agile PLM for Process 6.1.1.0.0"

- – Platform is "{The platform you are interested in}", i.e. "Microsoft Windows x64 (64-bit)".

   e. Click **Search**. The latest patches and hot fixes will be provided in the search results.

   f. Download the appropriate patch releases or hot fixes.

3. Oracle Technology Network (OTN): http://www.oracle.com/technetwork/indexes/documentation/index.html. OTN contains documentation for Agile PLM for Process.

   a. Access http://www.oracle.com/technetwork/indexes/documentation/index.html.

   b. Under the Applications section, click **Apps A-Z** and select the **Agile** link. A new window opens.

   c. Click **Agile PLM for Process Documentation** to see a listing of available documentation.

4. Oracle Community Forums: https://community.oracle.com/community/oracle-applications/agile_plm/agile_plm_for_process. Visit the Agile PLM for Process community forum for the latest announcements and product assistance.

Installation Requirements

The Agile PLM for Process Software Requirements table shows the operating system and the other software supported or required for each component.

Software Requirements

Table 1–1   Software Requirements

Component	Operating System	Certified Software
Web Application Server	Microsoft Windows Server OS that is supported by the certified software	■ IIS 8.5 on Microsoft Windows 2012 Server R2 ■ IIS 8.0 on Microsoft Windows 2012 Server ■ IIS 7.5 on Microsoft Windows 2008 Server R2 64-bit ■ IIS 7.0 on Microsoft Windows 2008 Server SP1 32-bit/64-bit ■ IIS 6.0 on Microsoft Windows 2003 Server SP2 32-bit
.NET Framework	Microsoft Windows Server OS that is supported by the certified software	Microsoft .NET Framework 3.5 + latest available service pack
Microsoft Database Server (Standard & Enterprise)	Microsoft Windows Server OS that is supported by the certified software	■ Microsoft SQL Server 2014 ■ Microsoft SQL Server 2012 R2 ■ Microsoft SQL Server 2008 R2 ■ Microsoft SQL Server 2008 SP1 or higher ■ Microsoft SQL Server 2005 SP2 or higher
Oracle Database Server (Standalone and RAC) Note: Oracle Standard Edition does not support RAC	Any server OS that is supported by the certified software	■ Oracle Database 12c (ODP.NET client 12c) ■ Oracle Database 11gR2 (ODP.NET client 11gR2) ■ Oracle Database 11g (ODP.NET client 11.1.0.6) ■ Oracle Database 10gR2 (ODP.NET client 11.1.0.6)
ODP.NET Client	Same as Application Server	■ Oracle ODP.NET 12c for 12c ■ Oracle ODP.NET 11gR2 for 11gR2 ■ Oracle ODP.NET 11.1.0.6 for 11g Note: Oracle does not support Oracle 11g client on Microsoft Windows 2008 Server R2
Microsoft SQL Reporting Services	Microsoft Windows Server OS that is supported by the certified software	■ Microsoft SSRS 2008 ■ Microsoft SSRS 2005
Oracle BI Publisher	Any server OS that is supported by the certified software	■ Oracle BI Publisher 11.1.1.5 ■ Oracle BI Publisher 10.1.3.4 ■ Oracle BI Publisher 10.1.3.3
Web Client Browser	Microsoft Windows OS that is supported by the certified software	■ Internet Explorer 11.0 * ■ Internet Explorer 10.0 * ■ Internet Explorer 9.0 ■ Internet Explorer 8.0 ■ Internet Explorer 7.0

* IE10 and IE11 are only supported when the Document Mode is set to IE5 quirks. A new web.config was added via the Installer or manual installation process to c:\inetpub\wwwroot\ that sets this for you, so there should be no action required by IT or the user base. Please see Troubleshooting Tips in this guide for more information if you are having problems.

Hardware Requirements

Minimum Requirements
The following table shows the minimum hardware needed to deploy Agile PLM for Process.

Web Application Server	Dual CPU Intel Xeon 3.0+ GHz
	2 MB L2 Cache
	4 GB RAM (32-bit)
	8 GB RAM (64-bit)
DB Server	Dual CPU Intel Xeon 3.0+ GHz
	2 MB L2 Cache
	4 GB RAM
	Separate drives for data and log files
Remoting Container	Same as Web Application Server
	Note: Remoting Container is lightweight and can be run on any existing application server.

Hardware Recommendations
The following table shows the typical hardware recommendations for production deployments of Agile PLM for Process.

Web Application Server	Quad Core, Dual CPU Intel Xeon 3.0+ GHz
	2 MB L2 Cache
	8+ GB RAM (32-bit)
	12+ GB RAM (64-bit)
DB Server	Quad Core, Dual CPU Intel Xeon 3.0+ GHz
	2 MB L2 Cache
	16+ GB RAM
	Separate drives for data and log files
Remoting Container	Same as Web Application Server
	Note: Remoting Container is lightweight and can be run on any existing application server.

2

Installation

This chapter discusses Agile PLM for Process maintenance pack installation and includes the following topics:

- Overview
- Prerequisites
- Installation
- Optional: Update NLS Language Packs

Overview

A Maintenance Pack is a collection of bug fixes and previously released patches provided to increase stability to a major release. For a list of bugs and patches included in this maintenance pack, please see the Release Notes.

A Maintenance Pack generally includes the following:

- All General Availability (GA) hot fixes from previous releases at time of the maintenance release
- Customer and internally submitted bugs that were not hot fixed

A Maintenance Pack generally does NOT include the following:

- New features that alter the application functionality
- Customer enhancement requests
- All binary and configuration files. Maintenance Packs are considered a delta package that includes only the changed files from the prerequisite release. This is intended in order to ease the upgrade process.

Installing Agile PLM for Process involves several steps, including:

- Understanding system requirements, described in previous chapter
- Running an installer
- Alternatively running the command prompt installation batch files if the installer is not a viable installation method
- Performing post-installation tasks, such as:
  - Performing some base application environment configurations
  - Testing the installation

> **Note:** Some tasks required to complete this installation are technical in nature. Please refer to Appendix C, "Skill Set Requirements and Recommendations" for a list of skills recommended for completing tasks included in this guide.

Prerequisites

Oracle Agile Product Lifecycle Management for Process version 6.1.1.0.

Installation

Oracle Agile Product Lifecycle Management for Process version 6.1.1.6 includes an installer to ease and simplify deployment. The installer will back up the affected files to a location of your choosing, replace all changed DLLs, update changed configuration files, and optionally update your database. If you choose not to use the installer, you can still follow the manual process as found in Appendix A, "Manual Installation".

1. Download and unzip the deployment package to a temporary location.

    Example: `c:\tmp\6116`

2. Backup the database.

3. Stop the Remoting Container service and IIS.

    `C:\> net stop remotecontainerservice`

    `C:\> iisreset /stop`

4. Run **MR6116setup.exe** and follow the on-screen instructions to perform the installation.

5. If you chose to skip updating the database via the installer, run **ApplyScripts.exe** to apply the 6.1.1.6 database updates against the PLM for Process database.

    1. Open a command prompt and browse to the Installer\ApplyScripts directory:

        Example: `c:\tmp\6115\Installer\ApplyScripts`

    2. If your database is Microsoft SQL Server:

        ```
        ApplyScripts -c "server=<database_
        server>;uid=<user>;password=<password>;database=<database>
        " -f v6.1.1.6.xml
        ```

    3. If your database is Oracle:

        ```
        ApplyScripts -c "user id=<user>;password=<password>;data
        source=<TNS Entry>" -f v6.1.1.6-orcl.xml -dbvendor orcl
        ```

    4. Review the applyscripts.log for errors.

6. OPTIONAL: Apply styling changes.

    If you previously made changes to the following style sheets in web\css, please merge them manually from your backup: `Brand.css`, `CommonStyles.css`, `Icons.css`, `NavMenuStyles.css`, `TypeAhead.css`.

7. Start the Remoting Container service and IIS.

```
C:\> net start remotecontainerservice
C:\> iisreset /start
```

Optional: Update NLS Language Packs

This task is not part of the installer. Apply the NLS pack scripts using the ApplyScripts.exe utility.

Microsoft SQL Server

German - v6.1.1.6_German_LangPack.xml

Italian - v6.1.1.6_Italian_LangPack.xml

Chinese - v6.1.1.6_Chinese_LangPack.xml

ChineseTW - v6.1.1.6_ChineseTW_LangPack.xml

French - v6.1.1.6_French_LangPack.xml

Korean - v6.1.1.6_Korean_LangPack.xml

Portuguese - v6.1.1.6_PortugueseBR_LangPack.xml

Spanish - v6.1.1.6_Spanish_LangPack.xml

Oracle

German - v6.1.1.6_German_LangPack-orcl.xml

Italian - v6.1.1.6_Italian_LangPack-orcl.xml

Chinese - v6.1.1.6_Chinese_LangPack-orcl.xml

ChineseTW - v6.1.1.6_ChineseTW_LangPack-orcl.xml

French - v6.1.1.6_French_LangPack-orcl.xml

Korean - v6.1.1.6_Korean_LangPack-orcl.xml

Portuguese - v6.1.1.6_PortugueseBR_LangPack-orcl.xml

Spanish - v6.1.1.6_Spanish_LangPack-orcl.xml

A

Manual Installation

This appendix contains procedures for a manual installation.

Setting Up the Installation Environment

Unzip the maintenance pack zip archive to a temporary directory (i.e.; c:\INSTALL_ HOME). You will have the following top-level directory structure.

Core.zip

FileCompressionHelper.exe

<DIR>Installer

MP-ALL.zip

Readme.txt

Follow the directions detailed below for Core/Media Pack installation.

Installation Tasks

Installation consists of the following tasks:

- Stopping Services and Backing Up Files
- Clearing Temporary ASP.NET Files
- Installing Software and Scripts
- Starting Services

Stopping Services and Backing Up Files

1. Stop Internet Information Services (IIS).

   ```
   C:\> iisreset /stop
   ```

2. Stop the `RemoteContainerService` service.

   ```
   C:\> net stop remotecontainerservice
   ```

   > **Note:** Your service may be named differently.

3. Perform a full backup of the database.

4. Back up the PLM4P_HOME directory (excluding \XDocuments and \Logs).

Clearing Temporary ASP.NET Files

For 64-bit, delete all files in the following directory:

```
C:\Windows\Microsoft.NET\Framework64\v2.0.50727\Temporary ASP.NET
```

For 32-bit, delete all files in the following directory:

```
C:\Windows\Microsoft.NET\Framework\v2.0.50727\Temporary ASP.NET Files
```

Installing Software and Scripts

Setting Up PLM4P_HOME

> **Note:** This step needs to be done only once per web site instance. If you have multiple instances of the Agile PLM suite running on the same server, you will need to perform this step once per instance.

1. Create a folder (e.g. c:\PLM) into which to install the application. For instructional purposes, this folder will be called PLM4P_HOME.

Installing the Core Bundle

Throughout the instructions below, the place where you extracted the media bundle zip will be referred to as INSTALLER_HOME.

1. Extract `Core.zip` located in INSTALLER_HOME to INSTALLER_HOME\temp.

> **Note:** This will give you a directory structure of INSTALLER_HOME\temp\Apps, INSTALLER_HOME\temp\Config, etc.

2. Copy `FileCompressionHelper.exe` from INSTALLER_HOME to INSTALLER_HOME\temp.

3. From a command prompt, run the following from INSTALLER_HOME\temp:

```
FileCompressionHelper.exe -d
```

4. When the distribution is complete, move the contents of INSTALLER_HOME\temp to PLM4P_HOME.

5. Delete all remaining files from INSTALLER_HOME\temp.

Installing the Media Pack Bundle

1. Unzip `MP-ALL.zip` to INSTALLER_HOME\temp.

> **Note:** This will give you a directory structure of INSTALLER_HOME\temp\config, INSTALLER_HOME\temp\Web.

2. Copy `FileCompressionHelper.exe` from INSTALLER_HOME to INSTALLER_HOME\temp.

3. From a command prompt, run the following from INSTALLER_HOME\temp:

```
FileCompressionHelper.exe -d
```

4. When the distribution is complete, move the contents of INSTALLER_ HOME\temp to PLM4P_HOME.

5. Delete all remaining files from INSTALLER_HOME\temp.

Restoring Custom Configurations

You must merge any configuration files that were included with 6.1.1.6.

Restoring Solution Packs

If you have any Solution Packs installed from the Extensibility Pack, you must reinstall them using the installer provided in Extensibility Pack 3.13. You will need to run the installer twice; once to remove and once to install.

Applying Install Database Scripts

1. Open a command prompt and browse to the INSTALLER_ HOME\Installer\ApplyScripts directory.

2. Apply the install scripts using the ApplyScripts.exe utility:

   - If running the SQL Server database upgrade:

     ```
     ApplyScripts -c "server=<database_
     server>;uid=<user>;password=<password>;database=<database>" -f v6.1.1.6.xml
     ```

   - If running the Oracle database upgrade:

     ```
     ApplyScripts -c "user id=<user>;password=<password>;data source=<TNS
     Entry>" -dbvendor orcl -f v6.1.1.6-orcl.xml
     ```

3. A list of unique IDs will be listed out as they are applied to the database. This will take a variable amount of time based on the environment and the amount of updates needed to be performed against your specific database.

4. If the script update is successful you will see the following as the last line before the program exits:

   ```
   Processed - with no errors
   ```

5. Install IE11 support on 6.1.1.6.

   For IIS7.0 and above:

   a. Run the following command as Administrator. <Website Name> refers to the name of the IIS website which hosts the PLM for Process 6.1.1.6 applications.

      ```
      %WINDIR%\System32\inetsrv\appcmd.exe set config "<Website Name>"
      /section:httpProtocol /+customHeaders.[name='X-UA-Compatible',value='IE=5']
      ```

   For IIS6.0:

   a. Run the following command as Administrator. < Website Identifier> refers to the Identifier of the IIS website which hosts the PLM for Process 6.1.1.6 applications.

      ```
      %WINDIR%\system32\cscript.exe C:\Inetpub\AdminScripts\adsutil.vbs set
      w3svc/<Website Identifier>/Root/HttpCustomHeaders "X-UA-Compatible: IE=5"
      ```

Optional: Update NLS Database Scripts

1. Apply the NLS pack scripts using the `ApplyScripts.exe` utility.

Microsoft SQL Server

v6.1.1.6_German_LangPack.xml

v6.1.1.6_Italian_LangPack.xml

v6.1.1.6_Chinese_LangPack.xml

v6.1.1.6_ChineseTW_LangPack.xml

v6.1.1.6_French_LangPack.xml

v6.1.1.6_Korean_LangPack.xml

v6.1.1.6_PortuguesBRe_LangPack.xml

v6.1.1.6_Spanish_LangPack.xml

Oracle

v6.1.1.6_German_LangPack-orcl.xml for German-NLS language

v6.1.1.6_Italian_LangPack-orcl.xml for Italian-NLS language

v6.1.1.6_Chinese_LangPack-orcl.xml for Chinese-NLS language

v6.1.1.6_ChineseTW_LangPack-orcl.xml for ChineseTW-NLS language

v6.1.1.6_French_LangPack-orcl.xml for French-NLS language

v6.1.1.6_Korean_LangPack-orcl.xml for Korean-NLS language

v6.1.1.6_PortugueseBR_LangPack-orcl.xml for PortugueseBR-NLS language

v6.1.1.6_Spanish_LangPack-orcl.xml

Starting Services

1. Start the RemoteContainerService service:

   ```
   C:\> net start remotecontainerservice
   ```

   > **Note:** Your service may be named differently.

2. Start Internet Information Services (IIS):

   ```
   C:\> iisreset /start
   ```

Cleanup

Delete the INSTALLER_HOME directory.

Verifying the Installation

You will probably have your own methods for verifying an installation, including User Acceptance Testing (UAT). However, please refer to Appendix B, "Verification Tests" for a basic checklist.

B

Verification Tests

Verification Tests

Perform the following verification tests after installation or upgrade.

- Global Specification Management Test
- Printing Test
- Attachment Test
- Reporting Test
- Supply Chain Relationship Management Test
- Nutrition Surveillance Management Test
- eQuestionnaire Test
- New Product Development Test
- Product Quality Scorecard Test
- Component Catalog Test
- Computer Aided Compliance Screening Test
- Supplier Portal Test
- User Group Administration Test
- Workflow Administration Test
- Product Quality Management Test
- Manage Core Data Test
- Manage Data Caches Test

Login Information

In order to perform the recommended Agile verification tests, you will need the user name and password for an Agile user account having access to all Agile applications. The standard username and password that ships with the certified database is:

Username: prodikaadmin

Password: agile

> **Warning:**   After first login, you will be prompted to assign a new password.

User access is managed using the User Group Management (UGM) application. For more information on user management, see the *Agile Product Lifecycle Management for Process Administrator User Guide*.

To verify installation:

1. Turn on Agile PLM for Process.

2. Access the Agile application using Internet Explorer. Use the following Fully Qualified Domain Name (FQDN) URL:

    `https://server.domain.tld/portal`

    Warning: Be sure to use a fully qualified domain name rather than just a servername. Example: `https://app.prodika.com/portal` **vs.** `https://app/portal`.

    ---

3. Type your use name and password, and press the **Enter** key. You will be prompted to change your password.

4. Type a new password in the **Password** field, and again in the **Repeat Password** field, and press the **Enter** key.

    Note: The following installation verification tests assume that you have installed the entire Agile application suite. If this is not the case, omit tests for applications that you have not installed.

    Warning: You must be assigned the correct Agile roles to perform these installation verification tests. For more information on roles, see the *Agile Product Lifecycle Management for Process Administrator User Guide*.

Global Specification Management Test

Before performing this test, note that specifications, once created, cannot be deleted from GSM. Therefore, creating specifications for verification purposes contributes to the proliferation of meaningless specifications. If specifications already exist in the system, you may wish to skip this test.

The purpose of this test is to verify that GSM is properly functioning.

To perform the GSM test:

1. Log in to Agile PLM for Process.

2. From the left navigation panel, select **GSM > Material Specifications**.

3. Click **Create New**. A new material specification is displayed.

4. Type a specification name in the **Spec Name** field.

5. Complete the Approved for Use In section at the bottom of the page.

6. Click **Save & Close**.

7. From the left navigation panel, select **GSM > Material Specifications**.

8. Conduct a blind search by clicking **Reset** and then **Search** or specify search criteria to retrieve the specification that you just created.

9. In the Search Results table, click the row containing the specification you created. The selected specification is displayed.

10. Click **Workflow**.

11. Type any value in the **Comments** field.

12. Click the move step forward icon ( ). If additional dialog boxes appear, it confirms that GSM is functioning.

> **Note:** To remove the test data in a production environment, restore your database, restart the Remoting Container, and then restart the application pools. This returns the environment to the default installation state.

Printing Test

The purpose of this test is to verify that the Agile Printing Service is correctly functioning.

To perform the Printing test:

1. Log in to Agile Product Lifecycle Management for Process.

2. From the left navigation panel, select **GSM > Material Specifications**.

3. Search for the specification that you created in "Global Specification Management Test" on page B-2.

4. Click **Print** in the action menu.

5. In the resulting Print dialog box under Current Specification > Sections, select any check box.

6. Click **Print** again. The specification is rendered in PDF format in a separate window.

7. Close the window once the PDF is successfully displayed and proceed to the next test.

Attachment Test

The purpose of this test is to verify that the Attachments feature is correctly functioning.

To perform the Attachment test:

1. Navigate to any trade specification in GSM.

2. Select the Supporting Documents tab.

3. Click **Edit** to put the specification in edit mode.

4. Select the Attachments/Procedures link under Supporting Documents.

5. Click **Add New** button.

6. In the **Title** field, type test.

7. Click the **Browse…** button, select a file, and then select **Open**.

> **Note:** The size of the selected file must be less than the designated limit.

8. Click the **Upload** button. The first upload may take up to 30 seconds to complete.

9. Click **Done** in the Attachment Detail window.

10. Click **Done** in the Attachment/Procedures window.

Reporting Test

The purpose of this test is to verify that the Prodika Reporting Service is correctly functioning.

To perform the Reporting test:

1. Log in to Agile PLM for Process.

2. From the left navigation panel, click **RPT (Reporting)**.

3. Search for the specification that you created in "Global Specification Management Test" on page B-2.

4. Click **Generate Report**.

5. In the resulting dialog, type a report name in the **Report Name** field and then click **Save**.

6. In the left navigation panel, select **Ad Hoc Reports > Reports Queue**.

7. The resulting Reports Queue should contain an entry for your report. Refresh this view periodically by toggling from Reports Queue to Reporting and back, to see the status of your report update. If the report status fails to update, there is likely a problem with the Reporting Service.

8. When the report status indicates `Complete`, click the hyperlinked name of the report to download the report.

Supply Chain Relationship Management Test

The purpose of this test is to verify that the SCRM application is correctly functioning.

To perform the SCRM test:

1. Log in to Agile PLM for Process.

2. From the left navigation panel, select **SCRM > Company Profiles**.

3. Conduct a blind search and select any company profile from the Search Results table to verify that it is displayed correctly.

4. If the company profile is displayed, click **Cancel** and proceed to the next test.

Nutrition Surveillance Management Test

The purpose of this test is to verify that the NSM application is correctly functioning.

To perform the NSM test:

1. Log in to Agile PLM for Process.

2. From the left navigation panel, select **NSM > Nutrient Analysis**.

3. Click **Create New**.

4. If the Nutrient Analysis template is displayed, click **Cancel** and proceed to the next test.

eQuestionnaire Test

The purpose of this test is to verify the eQ application is correctly functioning.

To perform the eQ test:

1. Log in to Agile PLM for Process.

2. From the left navigation panel, select **eQ > Material Questionnaires**.

3. Click **Create New**.

4. Fill out all required information, including representative data for each compliance section.

5. Send the eQ to yourself.

6. Open the eQ.

7. Fill in all required information.

8. Add an attachment.

9. Click **Completed - Send to** to send the eQ back.

New Product Development Test

The purpose of this test is to verify that the NPD application is correctly functioning.

To perform the NPD test:

1. Log in to Agile PLM for Process.

2. From the left navigation panel, select **NPD > New Product Development > Projects**.

3. Conduct a blind search and select any project from the Search Results table to verify that it is displayed correctly. If so, NPD has passed the test.

4. If no projects are found, click **Create New**.

5. Select a business unit and project type in the resulting dialog box and then click **Done**.

6. If the NPD (Stage 1) template is displayed, click **Cancel** and proceed to the next test.

Product Quality Scorecard Test

The purpose of this test is to verify that the PQS application is correctly functioning.

To perform the PQS test:

1. Log in to Agile PLM for Process.

2. From the left navigation panel, select **PQS > Lot Samples**.

3. Click **Create New**. The Lot Sample page loads.

4. In the **Code Data or Sample ID** field, type any text.

5. Click **Next**. The Select Specification page loads.

6. In the Specification section, click the search icon ( ) next to the **Specification** field. A Specification Search dialog box appears.

7. In the resulting Search dialog box, type criteria to find and select the material specification that you created in "Global Specification Management Test" on page B-2.

8. If the material specification is displayed, the test has succeeded.

9. Click **Close**, and proceed to the next test.

Component Catalog Test

The purpose of this test is to verify that the Component Catalog service is correctly functioning.

To perform the Component Catalog test:

1. Log in to Agile PLM for Process.

2. From the left navigation panel, select **GSM > Component Catalog**.

3. Conduct a blind search and select any catalog term from the Search Results table.

4. If the catalog term is displayed successfully, click **Cancel** and proceed to the next test.

5. If no catalog terms are found, click **Create New**.

6. Type a name for the catalog term in the **Component Catalog** field.

7. Click **Save & Close**.

Computer Aided Compliance Screening Test

The purpose of this test is to verify that the CACS application is correctly functioning.

To perform the CACS test:

1. Log in to Agile PLM for Process.

2. From the left navigation panel, select **CACS**.

3. Conduct a blind search and select any computer aided compliance screen from the Search Results table to verify that it is displayed correctly.

4. If no computer aided compliance screens are found, click **Create New**.

5. Type a name for the screen in the **Title** field and a description in the **Description** field.

6. Click **Save & Close**.

Supplier Portal Test

The purpose of this test is to verify that the Supplier Portal application is correctly functioning. First, log in to Supplier Portal and create a new registrant request:

To register with Supplier Portal:

1. Access Supplier Portal at https://server.domain.tld/supplierportal.

2. Select a **Language**, and on the login page click **click HERE if you have not registered with this site**.

3. Follow the screens, filling out all required data. Once you are done, click **Submit**. You have now submitted a registration request. Make note of your User Name and Password.

To perform the SPA test:

1. Log in to Agile PLM for Process as a Supplier Portal administrator.

2. From the left navigation panel, select **SPA > New Registrations**.

3. The registration request you just submitted should be displayed.

> **Note:** You need to be a supplier portal administrator to log in to SPA. Refer to the Agile PLM for Process Extensibility Pack documentation to find out how to create a supplier portal administrator user. You can find this documentation in the *Agile Product Lifecycle Management for Process Data Administration Toolkit Guide*.

User Group Administration Test

The purpose of this test is to verify that the UGM application is correctly functioning.

To perform the UGM test:

1. Log in to Agile PLM for Process.

2. From the left navigation panel, select **UGM > Groups**.

3. Conduct a blind search and select any group from the Search Results table to verify that it is displayed correctly.

Workflow Administration Test

The purpose of this test is to make sure that the WFA application is correctly functioning.

To perform the WFA test:

1. Log in to Agile PLM for Process.

2. From the left navigation panel, click **WFA (Workflow Administration)**.

3. Click **Create New**.

4. If the process template is displayed successfully, click **Cancel** and proceed to the next test.

Product Quality Management Test

The purpose of this test is to make sure that the PQM application is correctly functioning.

To perform the PQM test:

1. Log in to Agile PLM for Process.

2. From the left navigation panel, select **PQM > Issues**.

3. Conduct a blind search and select any issue from the Search Results table to verify that it is displayed correctly. If so, PQM has passed the test.

4. If no issues are found, click **Create New**.

5. Enter a title, and select a type and workflow on the Issue page, and then click **Save & Close**.

Manage Core Data Test

The purpose of this test is to verify that the ADMN (Manage Core Data) application is correctly functioning.

To perform the ADMN test:

1. Log in to Agile PLM for Process.

2. From the left navigation panel, select **ADMN > GSM Compliance > Additives**.

3. If the additives currently in the system are displayed successfully, click **Cancel** and proceed to the next test.

Manage Data Caches Test

The purpose of this test is to verify that the CACHE application is correctly functioning.

To perform the CACHE test:

1. Log in to Agile PLM for Process.

2. From the left navigation panel, click **CACHE (Manage Data Caches)**.

3. If the Schedule Cache Flush page is displayed successfully, the test has succeeded.

You can now use the scheduled Cache Flush Queue feature to see details for the different applications that been flushed. For more information, refer to the *"Using CACHE to Manage Caches"* chapter of the *Agile Product Lifecycle Management for Process Administrator User Guide*.

C

Skill Set Requirements and Recommendations

Skill Set

Refer to the following matrix for guidance on what skills are recommended for members of your technology team.

Table C–1   Skill Set Requirements and Recommendations

Skill Set	Description	Resource
Windows Server OS	Required skill for the management of the OS	Systems Administrator
IIS 6.0/7.0 and above	Required skill for the implementation and management of IIS	Systems Administrator
SQL Server or Oracle Database	Required skill for the implementation and management of the DB	DBA
Performance Tuning SQL Server or Oracle Database	Highly recommended skill for the DB monitoring and tuning of PLM4P specific to your environment and business use cases	DBA
SQL	Required skill for reporting development	DBA
	Recommended skill for triage and development	Developer
JScript	Required skill for the development of Calculated Extended Attributes	Developer
C#	Required skill for customization of the application suite using extensions, such as validations, workflow actions, etc.	Developer
XML	Required skill for the development of extensions and printing	Developer
XSD	Required skill for the development of printing	Developer
BI Publisher or Microsoft SQL Server Reporting Services	Required skill for custom report creation	Developer

D

Installation Troubleshooting

This appendix contains a list common issues that may occur after installation.

Troubleshooting Tips

The following list details common issues and suggestions for solving them.

1. How can I compare my recent build with an older build to see if configuration values have changed?

    Tip: Use the Config Rollup URL to check the rolled up configuration settings for various applications. The URL is:

    ```
    http://<serverName>/<appName>/WebCommon/AdminForms/ConfigRoll
    up.aspx
    ```

2. Clicking upload when adding a DRL attachment causes the window to simply blink.

    Tip: Ensure you've waited at least 30 seconds on the first attempt.

    Tip: Ensure the web.config for your .NET version has the machine key entry.

3. Message displayed is "trust relationship could not be established".

    Tip: Verify that the Web site your using has a signed certificate.

    Tip: If not testing SSL DRL attachments, configure them to use HTTP and ensure the "Prodika.GSMInterApp.URL" property is using HTTP.

4. Message displayed is "The remote certificate is invalid according to the validation procedure."

    Tip: Be sure to configure the **DRL.WebServices.Login** and **DRL.WebServices.Password** credentials using the Setup Assistant tool. The user specified should be an Agile PLM for Process user. For more information, refer to the *Agile Product Lifecycle Management for Process Configuration Guide*.

5. NPD edit-in-place documents are read-only.

    Tip: The user connecting to the IIS share does not have permissions to the underlying folder on the server. Grant full permissions by assigning the 'Everyone' permission setting on that folder. If that solves the problem, lock down the folder with tighter permissions.

6. The Browser keeps redirecting to incorrect URLs or keeps jumping from HTTPS to HTTP.

   Tip: Make sure that the environmentvariables.config file has the right URLs.

   Tip: You can only have one HTTPS site on one machine. If you have more than one, it bounces back and forth between the two sites

   Tip: Make sure that you are not using HTTPS in the URL to access a http Web site. Using https in your URL will make the Server redirect your request to the default https Web site.

   Tip: Conversely, if the environmentvariables.config file is using https to access a http Web site, you would be redirected to the default https Web site incorrectly

7. Navigation to any page in the application results in a blank page after migrating to another version or a new version of .NET is installed.

   Tip: The wrong ASP.NET version may be registered with IIS. Run the "aspnet_regiis.exe" utility with the "-r" flag.

8. The rich text dialog box is prompting me with security issues concerning scripts.

   Tip: Ensure the page event and request validation are turned off.

9. What is drl.prodika.com?

   Tip: Make sure that you have the new URLs and https:.

10. I am prompted to login to every application.

    Tip: Is the remoting container running?

    Tip: Ensure you are using the trust bridge in "EnvironmentSettings.config".

11. I have installed and receive the following error, or something similar, when I start the remotingcontainer or application:

    "Exception Message: No more connections can be created. They are all being used."

    Tip: This usually indicates a problem with the connect string. Verify your values are correct and that the connect string is syntactically correct. Also, when connecting to an Oracle database, make sure you have added the adapter factory config key to environmentsettings.config. Please read the section titled, "Configuring the Oracle Database Connection" of the v6.1.1.0 *Agile Product Lifecycle Management for Process Install/Upgrade Guide*.

12. I have upgraded and receive the following error when I start the remotingcontainer:

    "Xeno.Prodika.Common.ProdikaConfigurationException: Could not parse 'factory' attribute into an object on service tag ---> System.BadImageFormatException: Could not load file or assembly 'file:///E:\PLM\RemotingContainer\System.Data.dll'"

    Tip: We removed all DLLs from the %PLM4P_HOME%\remotingcontainer\ directory. This error indicates you performed an overlay on top of an existing %PLM4P_HOME%. Please read the section titled, "Install the Agile 6.1.1 Upgrade Software" of the v6.1.1.0 *Agile Product Lifecycle Management for Process Install/Upgrade Guide*.

13. I have upgraded and receive an error that it could not load the Oracle.DataAccess.DLL.

Tip: This is generally because you have the wrong Oracle client installed. Prior to 6.1.1, we only supported running PLM4P as a 32-bit application, regardless of OS bit level. Thus, it was required to download and install the 32-bit Oracle database client. In 6.1.1, we now offer the ability to run the application as a 64-bit application on a 64-bit OS. If you switched from 32-bit to 64-bit, you will need to install the 64-bit Oracle database client on your server.

14. When I try to run applyscripts, I receive an error that it could not load the Oracle.DataAccess.DLL.

Tip: See 13. The Oracle client needs to match the OS. Additionally, applyscript does not need to be run from the server. If there is another workstation or server where you know applyscript works, you can try running it from there.

15. When running PLM for Process as a 64-bit application, how do I make sure NPD edit-in-place documents refresh values?

Tip: Check EnvironmentSettings.config file, ensure ACE driver is set as <add key="OLEDB_CONNECT_STRING" value="Provider=Microsoft.ACE.OLEDB.12.0;Data Source={0};Extended Properties="Excel 12.0;HDR=No;""/>.

Tip: Ensure the additional "Microsoft Access Database Engine 2010 Redistributable" from Microsoft website is installed on the server.

16. I am using IE10 or IE11 and the application is behaving strangely. For instance, certain numeric input fields on GSM Specifications are showing as blank in edit mode.

Tip: IE10 and IE11 are supported only when the Document Mode is set to IE5 quirks. Fortunately, you should not need to perform any action as we take care of this for you on the server. To check your Document Mode, browse to the application using IE10 or IE11 and press F12. If the Document Mode is NOT IE5 quirks, please have your administrator verify the following:

- The PLM4P website in IIS is pointed to c:\inetpub\wwwroot\

- c:\inetpub\wwwroot\web.config exists and has the following configuration:

```xml
<?xml version="1.0" encoding="UTF-8"?>
<configuration>
    <system.webServer>
        <httpProtocol>
            <customHeaders>
                <add name="X-UA-Compatible" value="IE=5" />
            </customHeaders>
        </httpProtocol>
    </system.webServer>
</configuration>
```

Tip: In IE11, it is important that you do NOT add the PLM for Process application domain to the Compatibility List. This will cause compatibility issues with other applications such as BI Publisher.