Agile Product Lifecycle Management

Agile Drive User Guide

Release 9.3.5

E61175-01

December 2015

ORACLE

Agile Drive User Guide, Release 9.3.5

E61175-01

Primary Author: Oracle Corporation

Contributing Author: Usha Pereira

Contributor:

Contents

Preface v

Audience v
Documentation Accessibility v
Related Documents v
Conventions v

1 Introducing Agile Drive

Definitions 1-1
Working with Agile Drive 1-1
Limitations 1-2
Structure of Agile Drive 1-3

2 Setting Up Agile Drive

Enabling Agile Drive in Java Client 2-1
Configuring Agile Drive Settings 2-1
Changing Parameter Values in the settings.conf File 2-1
Parameter Definitions 2-1
URL for Application and File Manager 2-2
User Account Details 2-2
Encoding Details 2-2
Read Only Mode 2-2
Cache Tuning Parameters 2-2
Exclusion Filters 2-3
Maximum Rows Displayed 2-3
Agile Drive Configuration for OAM Setup 2-3
Deployment Architecture 2-4
Optional Settings 2-5
Notes on Platform Settings 2-5
Mapping Agile Drive 2-5
On Windows 8.1/ Windows 7 System 2-5
On Macintosh System 2-6
On GNOME Linux System 2-7
On KDE Linux System 2-7

3 Using the Agile Drive

Searching for Agile Objects 3-1
Search Limitations 3-1
Working with Files and Folders 3-2
Opening Files in Agile Drive 3-3
Tracking Versions 3-3
Traversing Item Revisions 3-5
Traversing a Bill of Material 3-6

Glossary

Preface

Agile PLM is a comprehensive enterprise PLM solution for managing your product value chain.

Audience

This document is intended for administrators and users of the Agile PLM products.

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 that have purchased support 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.

Related Documents

Oracle's Agile PLM 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 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 Documentation folder available on your network from which you can access the Agile PLM documentation (PDF) files.

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.

Convention	Meaning
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Introducing Agile Drive

Agile Drive is a system of managing the file attachments of Agile objects from your computer system in the form of files and folders, without requiring you to invoke Agile PLM application. It connects Agile's Distributed File Manager as a network place on your system, thus enabling Explorer like operations, such as copy or delete, on file attachments of Agile objects. It simplifies file management, leveraging existing intuitive client applications, like Explorer, Mac Finder and so on.

Definitions

Name	Descriptions
Agile Drive	A file system that helps manage the files attached to objects in the Agile PLM system. It is a logical representation of the Agile PLM objects and their associated attachments.
Agile object	An entity defined in Agile PLM that groups a set of attributes and relationships related to that object. Examples: Item, Folder and so on.
Agile PLM folder	A folder in Agile PLM system that holds attachments of other Agile objects, such as Item, Change Order and so on. Agile PLM folder is also treated as an independent Agile object.
Agile Drive folder	A folder that represents an Agile object on your system.
Non-Agile Drive folder	A folder on your system drive or any network drive other than Agile Drive.

Working with Agile Drive

Agile Drive enables you to use the files and folders available in Agile PLM without having to download them. The files can either be documents or drawings associated with Agile objects as file attachments in the Agile PLM system. To view the file properties of an Agile Drive folder, select Properties from right-click menu.

The table below describes the actions you can perform on files in Agile Drive.

Action	Description
View	Opens a file directly from an Agile Drive folder and views it in its native application, without downloading or checking out.
Save	Saves a file directly in an Agile Drive folder and creates a file attachment to the corresponding Agile object in the Agile PLM system.
Edit	Edits a file in its native application directly from an Agile Drive folder without downloading or checking out. To create a new version, save it as a new file.

Action	Description
Create	Creates a new file in Agile Drive using drag and drop from a non-Agile Drive.
Delete	Deletes a file from an Agile Drive folder, which in turn deletes the file attachment from the corresponding Agile object in the Agile PLM system.
View File Properties	View file properties, such as date of creation, date of last modification, size and more. Right-click a file in the Agile folder to locate View File Properties.
Add	Adds a file from your local drive, or any non-Agile network drive to an Agile Drive folder. Agile Drive stores this file as a file attachment to the corresponding Agile object in Agile PLM system and creates a version of every file that you add (this is applicable only for Design and File Folder objects). You can choose either the Drag-Drop option or Copy-Paste option to add a file.
Move	Moves a file from Agile Drive folder**.** You can use the Cut-Paste option to move a file from Agile Drive folder. Agile Drive creates a version of every file that you remove (this is applicable only for Design and File Folder objects).
Copy	Copies files from a non-Agile Drive folder into an Agile Drive folder. You can also drag-drop the required file.

Limitations

Agile Drive does *not* support the following functionalities:

File Functions

- Saving a file to a folder on the Agile Drive. Use the Save As option to save the file under a different name.
- Renaming a file.
- Checking-in files from Agile Drive folders.
- Checking-out files into Agile Drive folders
- Creating files in Agile Drive folder.
- Extracting data out of an uploaded file in Agile PLM.
- Undo operations.

Folder Functions

- Creating Agile Drive folders.
- Using the Copy-Paste option or the Drag-Drop option to move an Agile Drive folder into another Agile Drive folder.
- Using the Copy-Paste option or the Drag-Drop option to move a non-Agile Drive folder to an Agile Drive folder.
- Renaming Agile Drive folders.

Business Functions

- Rendering Affected Items & BOM revisions only for ECOs.
- Design Structure expansion.
- Workflow approvals.
- Status change.
- Display of Application data (Cover Page/P2/P3).
- PPM Content Tab.

Structure of Agile Drive

Agile Drive displays Agile objects as folders, and attachments as files in these folders. The table below gives us a better understanding of Agile objects in both; Agile Drive and Agile PLM system.

Entity	In Agile PLM System	In Agile Drive
Part	A Part is an Agile object	A Part is a folder - an Agile Drive folder, named after the Agile object it represents. Example-P00003.
Revision	A Revision is a state of an Agile object. Example: Introductory	A Revision is a Sub-folder, again an Agile Drive folder, named after the Revision state of the Agile object it represents. Example: Introductory
Attachment	An Attachment is a file associated to an Agile object. Example: agile2009022_ 075051313.xml, agile_ 20090224_113543937.axml, MirrorBolt1.SLDPRT	An Attachment is an Agile Drive file contained in an Agile Drive folder. The name of this Agile Drive file is the same as that of corresponding Attachments. Example: agile_ 20090224_075051312.axml, agile_20090224_ 113543937.axml, MirrorBolt1.SLDPRT

Figure 1–1 An Agile Object and its File Attachment in Agile Drive

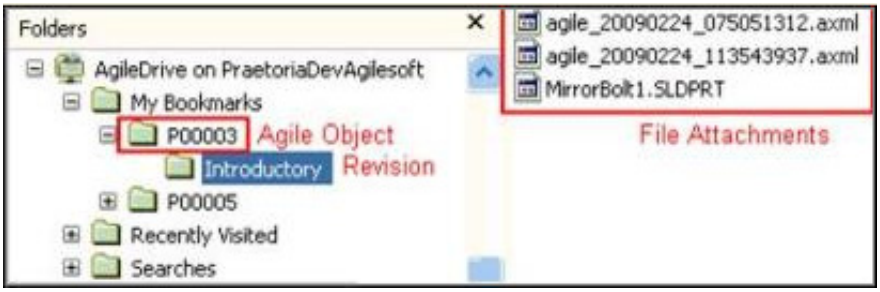
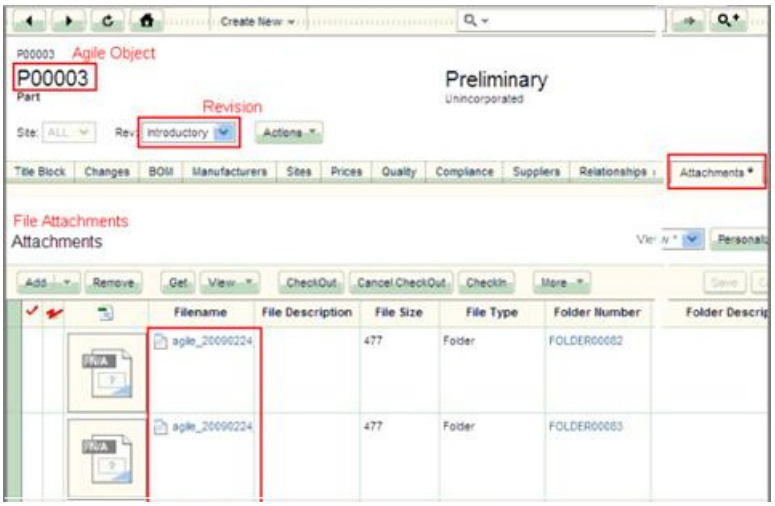


Figure 1–2 An Agile Object and its File Attachment in Agile PLM



2

Setting Up Agile Drive

This chapter helps you to configure and map Agile Drive settings.

Enabling Agile Drive in Java Client

When you deploy Agile PLM, by default, the Agile Drive is set as Disabled. To use Agile Drive, ensure that you enable it in Java Client.

To enable Agile Drive:

1. In Java Client, on the Admin tab, go to Server Settings > Preferences.
2. In the Agile Drive drop-down list, select Enabled.

   Once you enable the Agile Drive, the access is Read-only.
3. Restart all Distributed File Managers.

Configuring Agile Drive Settings

You can customize settings for Agile Drive by editing parameter definitions in the settings.conf file.

> **Note:** For configuration on Web Service Security environment, see the *Agile PLM Web Services Guide.*

Changing Parameter Values in the settings.conf File

To change parameter values in the settings.conf file:

1. Navigate to

   ```
   <Installed Server
   Location>\agileDomain\applications\webdav.war\WEB-INF\classes\
   <Installed server
   location>\FileManager\work\Catalina\localhost\webdav\WEB-INF\classes
   ```
2. Open 'settings.conf' file
3. Set the readonly.mode=false & Save file.
4. Restart FileServer.

Parameter Definitions

You can edit the settings.conf file to define the following parameters.

- URL for Application and File Manager

- User Account Details
- Encoding Details
- Readonly mode
- Exclusion Filters
- Cache tuning
- Maximum rows displayed

URL for Application and File Manager

Name	Description
app.server.url	Specifies the location of the Agile PLM Application Server. The format is `http://<server host name>:<port>/Agile/RMIServlet`
file.server.url	Specifies the location of the File Server (Manager). The format is `http://<server host name>:<port>/Filemgr/services/FileServer`

User Account Details

User Credentials	Description
Name	Agile User ID Example:ifsuser
Password	The encrypted Agile User Password. Example:221B758BAAE4C4

Encoding Details

Parameter	Description
name.encoding	Encodes directory names using HTML URL Encoding. Setting the value to 'FALSE' enables HTML URL encoding on folder names.

Read Only Mode

Parameter	Description
readonly.mode	Setting it to 'FALSE' turns on the 'Read-write' mode. Setting it to 'TRUE' enables you to only view the files and not modify them. The default setting is 'TRUE'.

Cache Tuning Parameters

Parameter	Description
cache.reload.interval	Setting cache reload interval to 2 enables you to refresh the cache twice.
cache.timeout	Setting cache timeout to 30 implies cache entries are deleted from Agile Drive after being inactive for 30 minutes. 30 indicates the time to live (TTL) for cache entries. The minimum cache timeout is 20 minutes.

Exclusion Filters

Parameter	Description
exclude.filetypes	Specifies file types that should be filtered out of the file list. Usage: exclude.filetypes - doc,dwg,prt. For example, to filter out Word files and show only PDFs, set exclude.filetypes=doc.

Maximum Rows Displayed

Parameter	Description
max.row	Specifies the number of rows to be displayed in the Search Results and BOM tables Minimum value = 250 Maximum value = 5000

Agile Drive Configuration for OAM Setup

The Agile Drive configurations given below are applicable for Oracle Access Manager and Windows NTLM.

To configure Agile Drive for Single Sign On setup:

1. Make sure you enable Agile Drive in Java Client.
2. Configure LDAP Authenticator in WLS Admin console. Refer to the *Agile PLM Administrator Guide* for details.

   Given below is a graphic image of the Oracle Internet Directory Authenticator Settings.

Figure 2–1 Settings for the AgileRealm

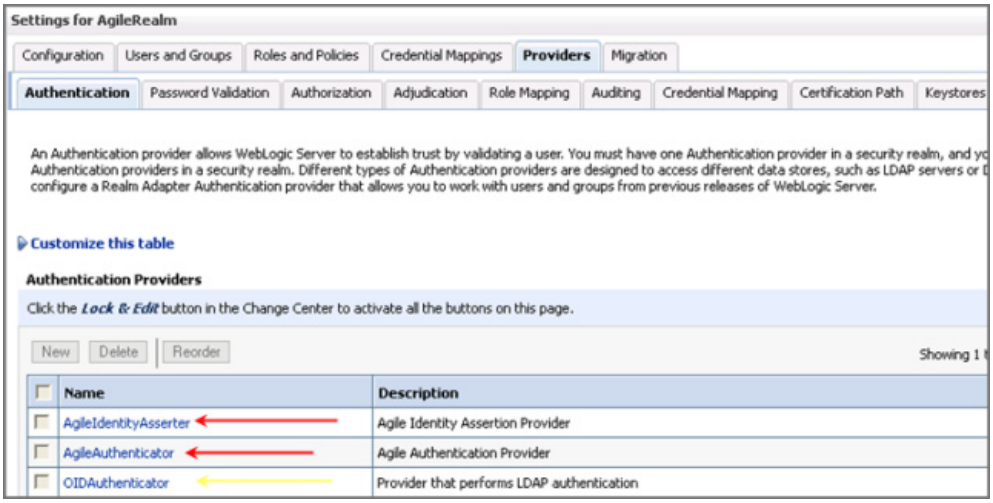
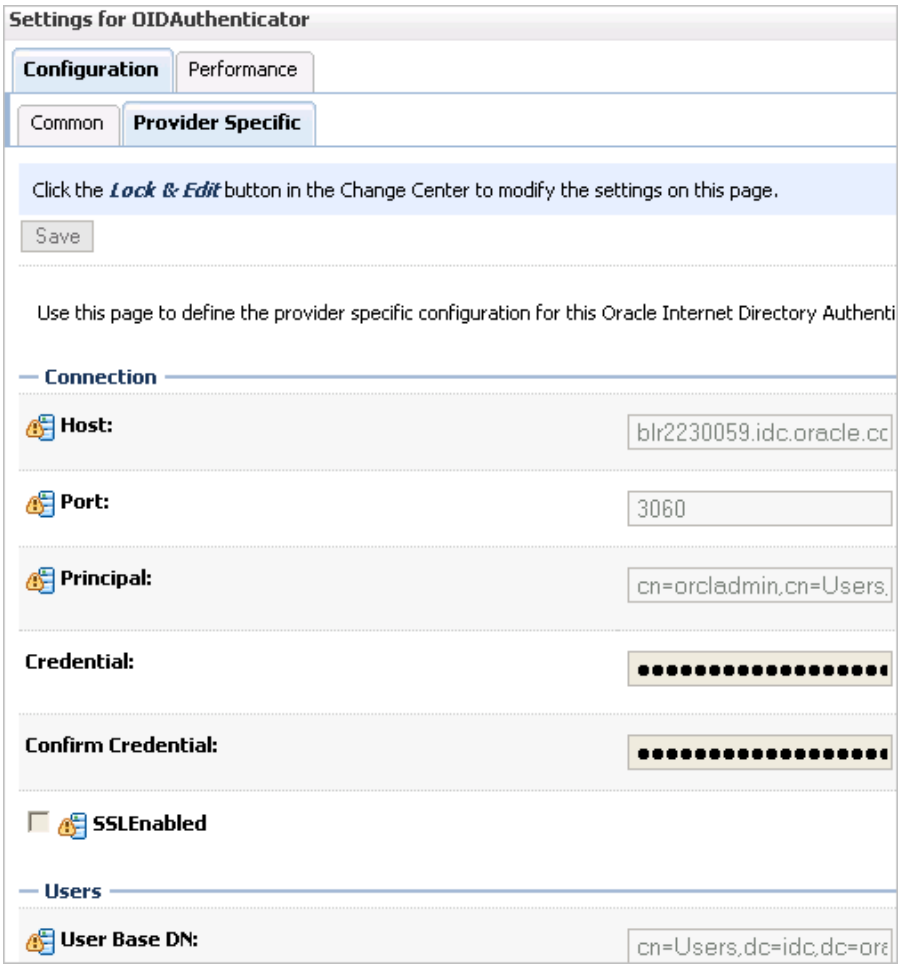


Figure 2–2 Settings for Oracle Internet Directory Authenticator



3. Make sure the File Server and Agile Drive application are configured with WLS direct access without going through the proxy URL.

Example 2–1 IN server.conf for File server

- app.server.http://<Server>:<Port>/Agile/services/FSHelper
- file.server.url=http://<Server>:<Port>/Filemgr/services/FileServer
- dms.server.url=http://<Server:<Port>/Agile/services/DmsService

Example 2–2 In Settings.conf for Agile Drive

- app.server.url=http://<server>:<Port>/Agile/RMIServlet
- file.server.url=http://<server>:<Port>/Filemgr/services/FileServer

4. Configure Agile Drive in Windows 7/ Windows 8.1.

Deployment Architecture

- XML based request/response model
- Customized version of Apache Tomcat/8.0.22 Web DAV Servlet
- Supported on most platforms

- Deployed on File Manager instance as a new Web Application
- Communicates with Application Server for object meta data
- Caching for better performance

Optional Settings

Agile Searches on Windows 7/ Windows 8.1 times out after 30 seconds.

To increase the Microsoft Client time-out:

1. Add a ReceiveTimeout DWORD value with a data value of (<number of seconds>)*1000 in the Registry settings as follows: *HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\Internet Settings* Example: If you want the timeout duration to be 8 minutes, set the ReceiveTimeout data value to 480000 (<480>*1000).
2. Reboot the system.

Notes on Platform Settings

Refer to the *Agile PLM Capacity Planning Guide* for all software requirements.

- The Web Folders Client is bundled with Microsoft Windows 8.1, 7 (64-bit, 32-bit). Download and install Microsoft Web Folder Update **KB907306** from

  http://www.microsoft.com/downloads/details.aspx?FamilyId=17C36612-632E-4C04-9382-987622ED1D64&displaylang=en

- To ensure the effective working of file uploads in Mac OSX Finder, disable the creation of intermediate file store (.DS_Store).

  http://support.apple.com/kb/HT1629

Mapping Agile Drive

You can map Agile Drive on one of the following operating systems.

- "On Windows 8.1/ Windows 7 System" on page 2-5
- "On Macintosh System" on page 2-6
- "On GNOME Linux System" on page 2-7
- "On KDE Linux System" on page 2-7

On Windows 8.1/ Windows 7 System

To map Agile Drive on Windows 8.1 / Windows 7 systems (both 32-bit and 64-bit systems):

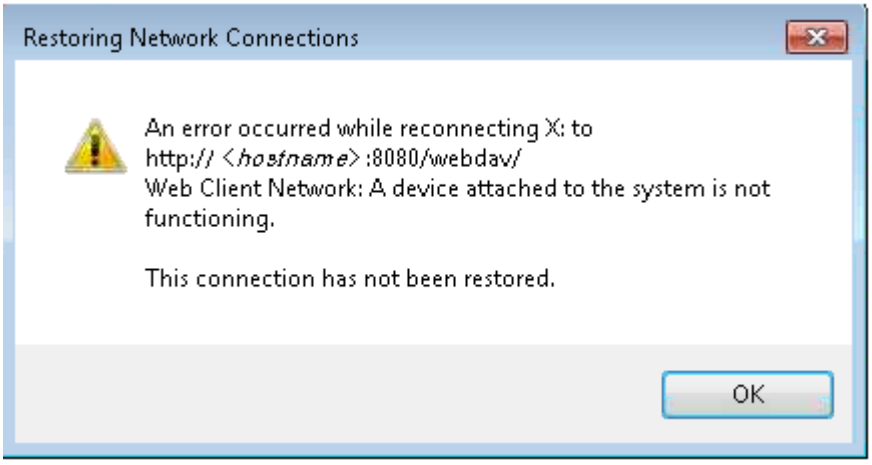
1. Click the Start button in Windows 8.1/Windows 7.
2. Run regedit.
3. Navigate to key "HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\services\WebClient\Parameters" in regedit and modify the parameter "BasicAuthLevel" with value of 2, which enables basic authentication for Windows 8.1/ Windows 7.
4. Close regedit to save the changes.
5. Restart the service of “Web Client” in Windows 8.1/ Windows 7 Services.

6. Launch the command in Windows 8.1 /Windows 7.
7. Enter the following in the command line: net use `* http://<Host Name or IP Address>:<port>/webdav/PASSWORD /USER:USERID` where User= Username, and password.
8. Press ENTER.

You have successfully mapped Agile Drive on Windows 8.1/Windows 7.

> **Note:** Users connecting to Agile Drive on WIN7 come across the below warning message. Since this is a WIN7 limitation, the workaround is to disconnect and configure Agile Drive once again.

Figure 2–3 Restoring Networks



On Macintosh System

To map Agile Drive on the Macintosh system:

1. Select Connect to Server from Go in Main menu.
2. In the Connect to Server window, enter the Host Name or IP Address of the server where Agile Drive is deployed, with Port Number and Folder Name, as follows:

   `http://<Host Name or IP Address>:<port>/webdav/`

   > **Note:** Use the host name/IP address of web proxy or Tomcat server where Agile Drive is deployed (same as the File Manager by default). Contact your Agile administrator for the IP address and complete path of Agile Drive.

3. Click Connect.
4. Enter your Agile PLM username and password.
5. Click OK.

   The Agile Drive folder window appears.

On GNOME Linux System

To map Agile Drive on the GNOME Linux system:

1. Select Connect to Server... from Places in the main menu. The Connect to Server screen appears.
2. Enter the following parameters:

Field	Description
Service type	Select **WebDAV (HTTP)** from the drop-down list.
Server	Enter the **IP Address** of the server where Agile Drive is deployed.
Port	Enter **Port Number** of the server. The default value is **80**.
Folder	Enter **webdav** in lowercase.
User Name	Enter your Agile PLM username.
Name to use for connection	Enter any name of your choice.
	Contact the Agile administrator for required values.

3. Click Connect.
4. Enter your Agile PLM password and click Connect.

   The Agile Drive default folder window appears.

On KDE Linux System

To map Agile Drive on the KDE Linux system:

1. Open Shell Console and execute knetattach.
2. Select Webfolder (webdav) and click Next.
3. Enter data in the table below or contact your Agile administrator for required values.

Field	Description
Name	Enter a name of your choice.
User	Enter your Agile PLM username.
Server	Enter the IP Address of the server where Agile Drive is deployed.
Port	Enter Port Number of the server. The default value is 80.
Folder	Enter webdav in lowercase.

4. Click Connect.

   The Agile Drive folder window appears.

3

Using the Agile Drive

You can access Agile Drive using Windows Explorer, listed in My Network Places. When prompted, log in using your Agile PLM username and password.

For quick access to Agile Drive, create a shortcut on your desktop or create its menu item in the Start Menu.

> **Note:** Access to Agile Drive folders and files depends on the roles and privileges assigned to you in Agile PLM Administrator.
>
> MS Vista 64-bit and Windows XP 64 are not supported because Microsoft does not ship the required drivers. To open a folder, click and select Open.

Searching for Agile Objects

You can search for Agile PLM objects using Agile's canned (predefined) queries, such as Global Searches and Personal Searches. A canned search query appears as a folder in Agile Drive, and the Search Results appear as folders within this folder.

Example 3–1 Searching for Agile Objects

To perform a search called Unreleased Changes That I Created, navigate to the corresponding Folder. All unreleased changes created, appear as folders within this Search folder. Navigate to the desired unreleased change folder to see the affected items and its attachments, if any.

Search Limitations

Any search that requires user inputs or search criteria is not a feature of Agile Drive.

Example 3–2 Search Limitations

You cannot search for a specific ECO, say ECO25000. To search for specific searches, you need to use the Explorer feature of file or folders search.

To search for specific folders in (Windows 7/ Windows 8.1):

1. Click Start > Search > For Files or Folders...
2. In the Search Results window, click All Files and Folders. Specify the search criteria in the search field.
3. In the Look in drop-down list, select Browse. A Browse for Folder window pops up.

4. Expand My Network Places and select the Agile Drive.
5. Click OK to return to the Search Results window.
6. Click the Search button. The specified object appears as a folder in the Search results.

Working with Files and Folders

You can perform the following actions on files and folders in Agile Drive.

Note: Due to limitations of the client Operating System, Agile Drive error messages do not appear correctly on the client side.

Note: Intermittent failures can occur while adding multiple files on MAC OSX finder.

Note: Unable to Add, Get or Delete files in Web Dav on the Linux 7 Operating System.

How to	Steps
View or read a file	In an Agile Drive folder, double-click a file to read or view. Alternately, select Open from the right-click menu. The system opens the file in its associated application. For example, when you double-click a MS Word document file in an Agile folder, the system invokes MS Word, which opens this document in editable mode. You can only open the MS Office files directly from Agile Drive provided MS Office or MS Office Viewer application is installed on your system. For every other file type, you need to drag and drop the file (or copy the file and paste it) to the desktop or local drive and open it with its associated application.
Save a file	In Agile Drive, you can save a file in two ways: Save a new file in an Agile Drive folder directly: Create a file in an application and click Save (or Ctrl+S). In the Save window, select and save it in the desired Agile Drive folder. Save As: After editing an existing file in the Agile Drive folder, you can only save it using the Save As option due to the versioning aspect of Agile PLM. Use the Save As function to copy a file from an Agile Drive folder to your system folder, and save it after editing.

How to	Steps
Delete a file	Deletion of a file from an Agile Drive folder implies removal of a file attachment from an Agile object. To delete a file, select the desired file(s) in the Agile Drive folder and press Delete (Del) key once, or select Delete from right-click menu. The system deletes the file(s) without issuing any warning or requesting any confirmation. Agile Drive continues to display the deleted file(s) until you Refresh the display. Although the file appears to be deleted from Agile Drive folder, and from the corresponding Agile object, the Agile PLM application does not purge it out. Agile Drive does not allow deletion of a Redlined File.
View properties of a file	Select Properties from right-click menu of a selected file in the Agile Drive folder, to view its general properties.
Add a file	Adding a file in an Agile Drive folder implies adding a file attachment to an Agile object. You can do this by - copying & pasting - dragging & dropping, a file from a non-Agile Drive folder into an Agile Drive folder. You can also use the Save, and Save As features to save a file from an application. Agile Drive does not display the added file(s) until you refresh the display. When you add multiple files in Read-only mode of Agile Drive, a pop-up message appears for each file you add. It is recommended that you add only one or two files at a time.
Copy a file from an Agile Drive folder to a non-Agile Drive folder	In an Agile Drive folder, select the desired file. Select Copy from the right-click menu, or select Copy from Edit Menu of MS Windows Explorer. Navigate to the desired non-Agile Drive folder. Select Paste from the right-click menu, or, select Paste from Edit Menu of MS Windows Explorer.
View folder properties	To view general properties of a folder in Agile Drive, select Properties from right-click menu.

Opening Files in Agile Drive

For Text, PDF, HTML, DOC, RTF, XLS, PPT and other Microsoft format which support Microsoft clients, double-click the file and open with native application upon authentication.

Tracking Versions

Versioning applies to Design objects and File Folder objects of Agile PLM. When you add or delete a file attachment from a Design object or a File Folder object, Agile PLM retains the original status of these attachments as a version.

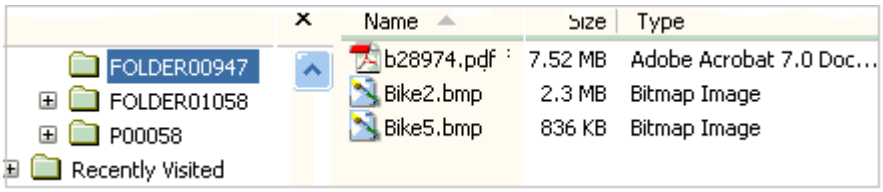
Agile Drive displays these versions as numbered folders under Previous Versions Folder in the 'versioned' Agile object, with Version Number 1 being the oldest/earliest version of the said Agile object.

This can best be understood with the example below:

1. In Agile Drive, select FOLDER00947, as shown in Screen 1. It contains three files.

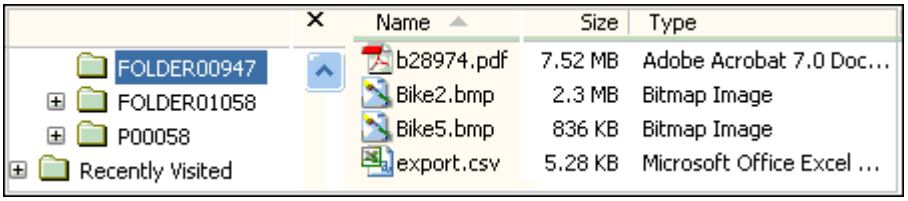
FOLDER00947 in Agile Drive is an Agile PLM File Folder Object, which has three file attachments.

Figure 3–1 Folder 00947



2. Add a file in FOLDER00947. The folder now contains four files.

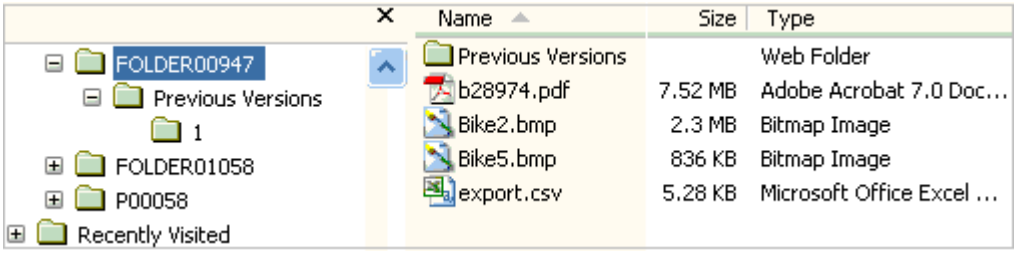
Figure 3–2 Folder displays the additional file



3. Wait for a few seconds and refresh (press Ctrl+F5) the Explorer view.

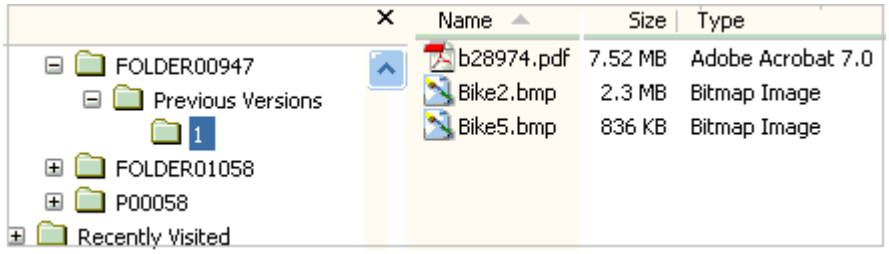
   A Previous Versions folder, and a sub-folder numbered 1, appears under FOLDER00947. This implies FOLDER00947 is the 'latest' version of File Folder object, which now has four file attachments.

Figure 3–3 Previous Versions Folder



4. Go to the folder 1 under Previous Versions folder. It contains the three files that originally existed in FOLDER00947 before you added the fourth file. This implies, the 'earlier' version of the File Folder object had three file attachments.

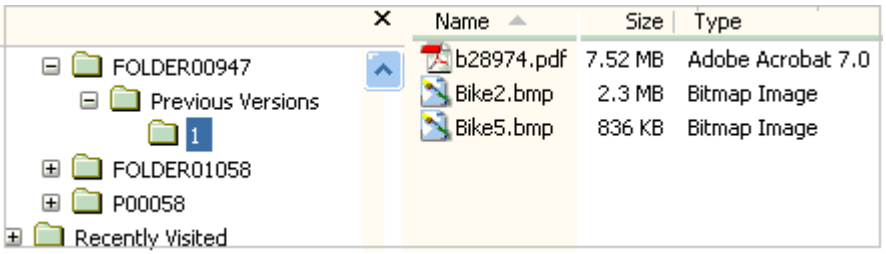
Figure 3–4 Earlier version of the File folder



5. Now, go back to FOLDER00947, which is the 'latest' version. Delete one of the files, say Bike2.bmp. This folder now has three files.

   This implies, you have deleted a file attachment from the File Folder object.

Figure 3–5 Deleted file



6. Wait for a few seconds and refresh (press Ctrl+F5) the Explorer view.

   The Previous Versions folder now has two sub-folders numbered 1 and 2. This implies, the Agile Drive folder number 2 is the 'previous' version of the said File Folder object, FOLDER00947, and it has the four file attachments that existed before you deleted one.

   Likewise, each time you add or delete any file in an Agile Drive folder (corresponding to a Design object or File Folder object), it maintains the original files in version numbered folders under the Previous Versions folder.

   Note: You cannot add or delete files from any of the Previous Version folders.

   If you delete, or purge, a version folder in Agile, the deleted or purged version folder does not appear in the corresponding Agile Drive folder.

   Note: The number of version folders that you see depends on the settings you have configured in Agile PLM. Refreshing (Ctrl+F5) the view in MS Windows XP Explorer does not display the changed versions in the folders (left) pane, although the changed versions appear in the right pane.

Traversing Item Revisions

A revision in Agile Drive appears as a 'prefix' to the Change object. The structure of Agile Drive folder, thus, appears as follows:

<Revision Name> - <Change Object Name>

The Agile objects, whose revisions are not yet defined in Agile are represented as

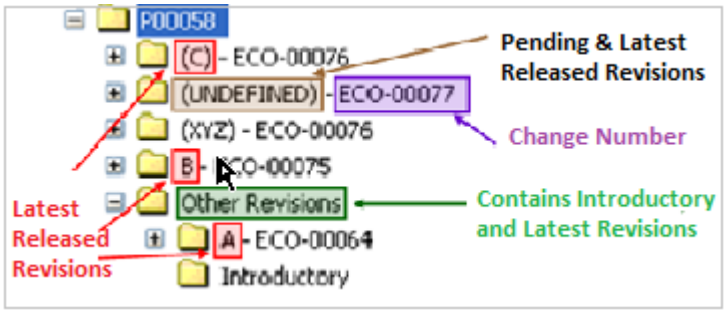
<UNDEFINED> - <Change Object Name>

Example 3–3 Traversing Item Revision

In the above image, since the new Change object, ECO-00077 has not been assigned a Revision Number, it is in the Pending state and hence appears as (UNDEFINED) - ECO-00077 in Agile Drive.

When you create a Part, its revision state is Introductory. When you bring about a change to this Part, a Revision is created, which is identified by a Revision Number. Once the Revision Number is assigned, it remains in the pending state until released. Enclosing the revision number in brackets represents the pending state. In this image, (C) - ECO-00076.

Figure 3–6 Traversing Item Revision



Other than the latest released revision, Agile Drive moves the 'earlier released revisions' into an Agile Drive folder called Other Revisions. Every time an Agile object goes through a Change, the latest revision appears as an Agile Drive folder under the folder for the main object.

Example 3–4 Traversing a Bill of Material

In the above image, the Agile Object P00058 had undergone a change because of Change object ECO-00064, which was revised only once as Rev-A. Later, it went through another change, ECO-00075, which was revised to Rev-B.

Note: Agile Drive does *not* display the structure of Design objects.

Traversing a Bill of Material

The Bill of Material (BOM) of an Agile object appears as folders under its corresponding Change object. In a BOM, the file attachments of a Parent object are located in the Change object.

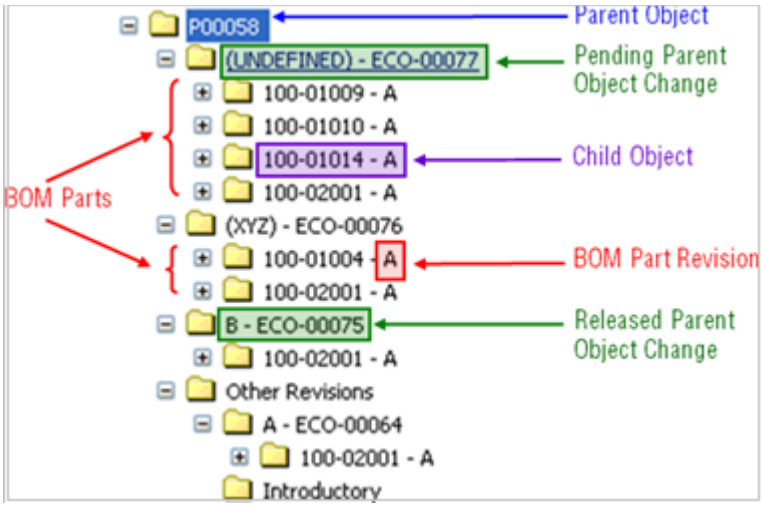
Example 3–5 Traversing a Bill of Material

The file attachments of Part P00058 are located under the folder B - ECO-00075, which corresponds to the Change object of this Part.

Example 3–6 Traversing a Bill of Material

The file attachments of a Child object are located in its corresponding folder. 100-01014-A is the child object of P00058.

Figure 3–7 Traversing Bill of Material



Glossary

ACP

See **Agile Configuration Propagation (ACP)**

Affected Files

Similar to Affected Items, these objects are EC files that are Design Release Candidates.

Agile Configuration Propagation (ACP)

Propagating existing configuration the PLM to the newly installed version of PLM.

ACS

See **Agile Content Service (ACS)**

Agile Content Service (ACS)

ACS is an event-driven XML-based publishing service that makes the product record available to a wide variety of business applications and users, internally and across the global manufacturing network

Agile Destination

A package created by an Agile PLM system in the target PLM using Web Services to import from the Attachments tab of the package in the target system.

Agile Integration Services (AIS)

A collection of predefined Web Services in the Agile Integration Framework that enable communication between the Agile Application Server and disparate systems

AI

Affected Items tab on Change objects in Agile.

AIS

See **Agile Integration Services (AIS)**.

Approved Manufacturer Parts List (AML)

List of approved manufacturer parts associated with an item.

AML

See **Approved Manufacturer Parts List (AML)**.

API

See **Application programming interface (API)**.

Application programming interface (API)

A set of routines, protocols, and tools for building software applications. An API expresses a software component in terms of its operations, inputs, outputs, and underlying types.

Assembly

A product assembly lists the parts in a product and shows the substances and materials that comprise those parts. It is linked to specifications that can restrict how much of a particular substance that product assembly may contain

Audit

An audit is the pro-active process of verifying compliance with quality requirements.

Automated transfer orders (ATO)

Content published by Agile PLM users in real time with a content transfer order (CTO) or set up subscribers to automatically create automated transfer orders (ATO) based on a schedule or triggered by a workflow status change.

Bill of Material (BOM)

A hierarchical representation of a product that is made up of other products.

Bill of Substances (BOS)

A hierarchical list of substances that are contained in the parts and assemblies that make up a BOM.

BOM

See **Bill of Material (BOM)**.

BOS

See **Bill of Substances (BOS)**.

CAD

See **Computer-aided design (CAD)**

Corrective and Preventive Actions (CAPA)

The CAPA is a formal process of addressing any generic quality problems and analyzing the root cause so you can implement corrective and preventive actions.

Commodity

A class of goods that is in demand, that is supplied without qualitative differentiation regardless of supplier.

Computer-aided design (CAD)

The use of computer systems to assist in the creation, modification, analysis, or optimization of a design. CAD software is used to increase the productivity of the designer, improve the quality of design, improve communications through documentation, and to create a database for manufacturing. CAD output is often in the form of electronic files for print, machining, or other manufacturing operations.

Contract (Price)

This is a subclass of the Published Prices class. Contract prices are prices provided by the supplier for a specific item or manufacturer part. This price information applies only for the specified duration and can apply to any project.

Co-Sourcing

The process of leveraging product cost across suppliers.

DCO

See **Design Change Order (DCO)**

Design Change Order (DCO)

A Change Order subclass that is available when the effected File Tab is enabled and provides access to all Agile PLM Workflow functions.

Design File Folder

An EC file folder that is integrated with CAD and PLM files, providing full access to PLM Workflow function.

EC

See **Engineering Collaboration (EC)**

EC Client

A Java-based UI to access, administer and operated the EC solution.

ECO

See **Engineering Change Order (ECO)**

Engineering Change Order (ECO)

An object that carries with it all the proposed changes to a product and/or its BOM. When approved and implemented, the proposed changes become effective.

Engineering Collaboration (EC)

An application that provides data and process integration between CAD applications and Agile PLM. It allows CAD designers and engineers to capture and control the data representing a primary source of the product record.

Extensible Markup Language (XML)

A markup language that defines a set of rules for encoding documents in a format that is both human-readable and machine-readable

File Manager

The File Manager manages files in a repository or vault in the file system and provides a place to store and retrieve files locally or remotely. You can install it on the same server as the Agile Application Server or on a separate one. You can also install the File in a redundant configuration and/or distributed across geographic regions.

File Transfer Protocol (FTP)

A standard network protocol used to transfer computer files from one host to another host over a TCP-based network, such as the Internet.

FQPN

See **Fully qualified path name (FQPN)**.

FTP

See **File Transfer Protocol (FTP)**

Fully qualified file name

The exact name of a file on a computer that is completely specified such that it is unambiguous and cannot be mistaken for any other file on that system.

Fully qualified path name (FQPN)

The full path of a resource, directory or file, stored in a computer. It is composed by the full path to the resource and its syntax depends on the operating system.

Item Master

The product record. It is the entire collection of Items - Parts, Documents, and any other user-defined subclasses of the Items class maintained under change control in the Agile system.

Java Message Service (JMS)

The Java Message Service (JMS) API is a Java Message Oriented Middleware (MOM) API for sending messages between two or more clients.

JMS

See **Java Message Service (JMS)**.

Lifecycle Phase

Current state in an object's workflow.

LRR

Latest Released Rev - concerning a Part or Document.

Non-Conformance Report (NCR)

NCR reports a basic material deviation from specifications or requirements in one or more products.

PDX

See **Product Definition eXchange (PDX)**.

PG&C

Product Governance and Compliance is a solution designed to help manufacturers manage all kinds of product compliance.

PLM

See **Product Lifecycle Management (PLM)**.

Problem Report (PR)

A Problem Report contains a basic description of a generic quality incident, problem, or incident reported from a customer's perspective

Product Definition eXchange (PDX)

A standard designed for the e-supply chain. This standard is based on the XML format because it provides a simple yet powerful and flexible way to encode structured data into a format that is both human- and computer-readable. In PLM, PDX packages contain product content, such as items.

Product Lifecycle Management (PLM)

The process of taking parts/documents from inception to production to phase-out, and all the stages in between.

Product Service Request (PSR)

Product Service Requests report quality incidents, and aggregate many PSRs to a single PSR.

Protocol

A system of digital rules or agreed-upon format for data exchange within or between devices. It determines the type of error checking and data compression used.

Published Price

This is a subclass of the Published Prices class. Published prices are prices provided by the suppliers in response to an RFQ and published from the project. The published price information can also be used in other projects.

PCO

See **Price Change Order**

Price

An object that carries with it all the proposed changes to a product and/or its BOM. It can be approved and implemented to make the proposed changes effective.

Price Change Order

It is an object that carries with it all the proposed changes to a price. It can be approved and implemented to make the proposed changes effective.

Quality Change Request (QCR)

QCRs allow you to aggregate problems into a routable quality record, perform root-cause failure analysis, and drive the problems to closure using standard CAPA procedures.

Quote History

A subclass of the Quote Histories class. Quote history prices are the stored prices from supplier responses that you can use. Any change in the response line of an RFQ is stored in the historical response and is usable at any time.

Request for Information (RFI)

A material declaration that lists the parts in a product assembly and shows the substances and materials contained in the part.

Request for Quote (RFQ)

A standard business process whose purpose is to invite suppliers into a bidding process to bid on specific products or services.

Request for Proposal (RFP)

A solicitation, often made through a bidding process, by an agency or company interested in procuring a commodity, service or valuable asset, to potential suppliers.

Response Line

A response line has information about only one item. The negotiation of price and terms for items is dealt with in a response line.

RFI

See**Request for Information (RFI)**.

RFP

See **Request for Proposal (RFP)**

RFQ

See **Request for Quote (RFQ)**

RFQ Response

A medium of communication between the user and the supplier. One response from a supplier can contain multiple response lines for different items. Price data is added to the project automatically when the supplier submits the response.

Schema

In computer programming, a schema is the organization or structure for a database. The activity of data modeling leads to a schema.

SDK

See **Software Development Kit (SDK or "devkit")**

Software Development Kit (SDK or "devkit")

A set of software development tools that allows the creation of applications for a certain software package, software framework, hardware platform, computer system, video game console, operating system, or similar development platform.

Sourcing Project

The entry point of sourcing and product pricing. A sourcing project tracks data required for sourcing and pricing, to perform data analysis for effective pricing.

Supplier

A supplier of one or several commodities.

TLA

See**Top Level Assembly (TLA)**

Top Level Assembly (TLA)

The level in a BOM that indicates the ultimate product being manufactured.

Transfer Order

Every time Agile Content Service (ACS) publishes product content, it produces a transfer order that keeps track of what, where, and when product content is transferred.

UPK

See **User Productivity Kit (UPK)**

User Productivity Kit (UPK)

The Oracle online help system used in some Oracle products.

Web Service Extensions (WSX)

A Web service engine that enables communication between Agile Product Lifecycle Management system and disparate internal and external systems.

WSX

See **Web Service Extensions (WSX)**.

XML

See **Extensible Markup Language (XML)**.

XML Schema

Description of a type of XML document, typically expressed in terms of constraints on the structure and content of documents of that type, above and beyond the basic syntactical constraints imposed by XML rules.