

Agile Product Lifecycle Management

Agile Drive User Guide

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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

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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.
<i>italic</i>	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.

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.

1.1 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.

1.2 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.

1.3 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.

1.4 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. Example - P00003	A Part is a folder, called as 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 called as Agile Drive folder, named after the Revision state of the Agile object it represents. Example: Introductory
Attachments	An Attachment is a file associated to an Agile object. Example: - agile_20090224_075051312.xml - agile_20090224_113543937.xml - MirrorBolt1.SLDPRT	An Attachment is a Agile Drive file contained in an Agile Drive folder. The name of this Agile Drive file is the same as that of corresponding Attachment. Example: - agile_20090224_075051312.xml - agile_20090224_113543937.xml - MirrorBolt1.SLDPRT

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

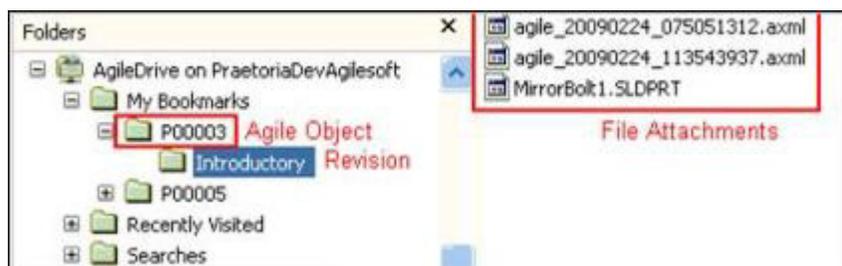
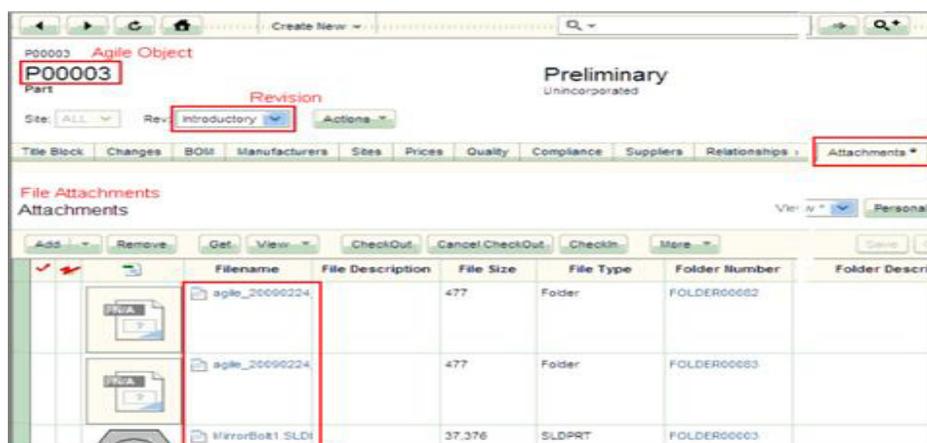


Figure 1–2 An Agile Object and its File Attachment in Agile



Setting Up Agile Drive

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

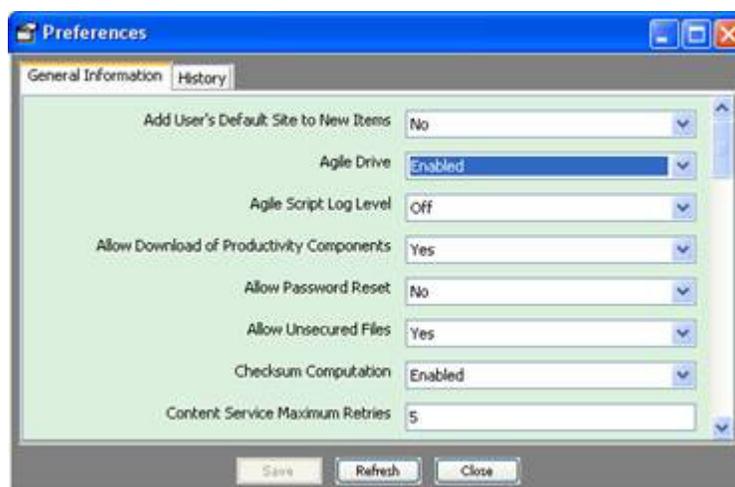
2.1 Enabling Agile Drive in Java Client

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, go to Server Settings > Preferences.
2. In the Agile Drive drop-down list, select Enabled.

Figure 2–1 Enabling Agile Drive



Once you enable the Agile Drive, the access is Read-only.

3. Restart all Distributed File Managers.

2.2 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*.

2.2.1 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.

2.2.1.1 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

2.2.1.2 URL for Application and File Manager

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

2.2.1.3 User Account Details

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

2.2.1.4 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.

2.2.1.5 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'.
---------------	---

2.2.1.6 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.

2.2.1.7 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.

2.2.1.8 Maximum Rows Displayed

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

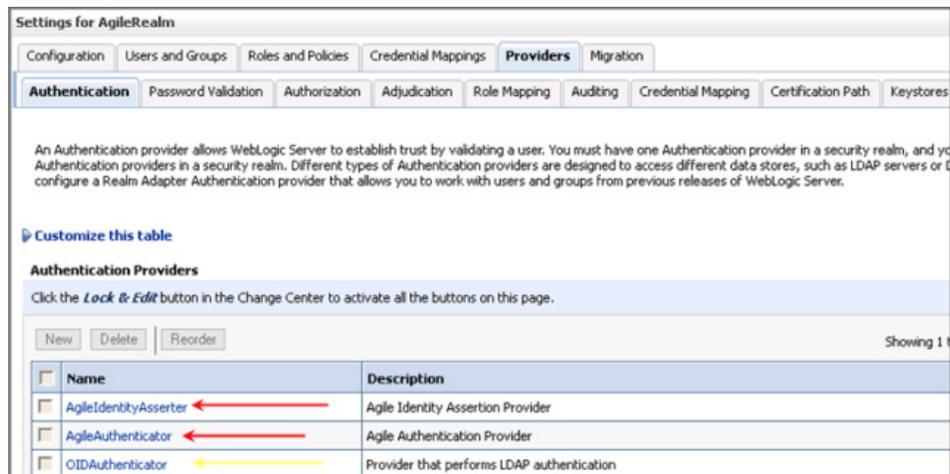
2.2.2 Agile Drive Configuration for OAM Setup

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

To configure Agile Drive for Single Sign On setup:

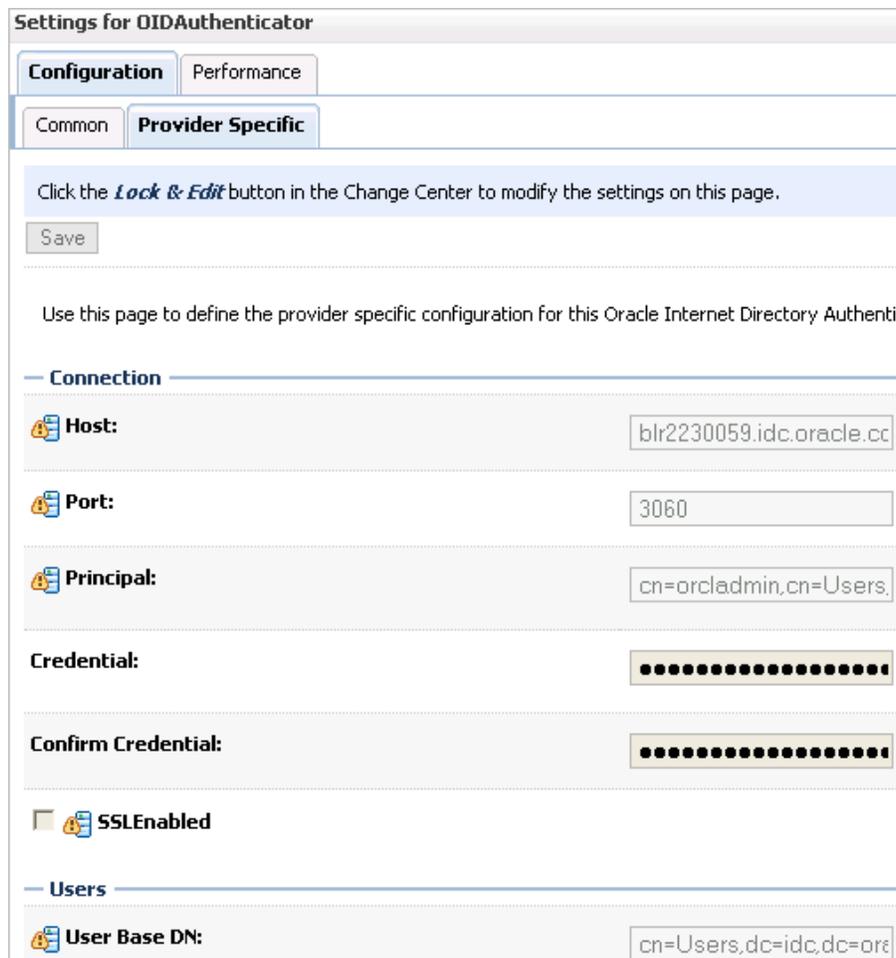
1. Make sure you enable Agile Drive in Java Client.
2. Configure LDAP Authenticator in WLS Admin console. Refer to the *Agile PLM Administrator Guide* for details.

Figure 2–2 Settings for the AgileRealm



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

Figure 2–3 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 Microsoft Windows 10, 8.1, 7 (64-bit, 32-bit).

2.2.3 Deployment Architecture

- XML based request/response model
- Customized version of Apache Tomcat/8.5.3 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

2.2.4 Optional Settings

Agile Searches on Microsoft Windows 10, 8.1, 7 (64-bit, 32-bit) 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.

2.2.5 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 10, 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>

2.3 Mapping Agile Drive

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

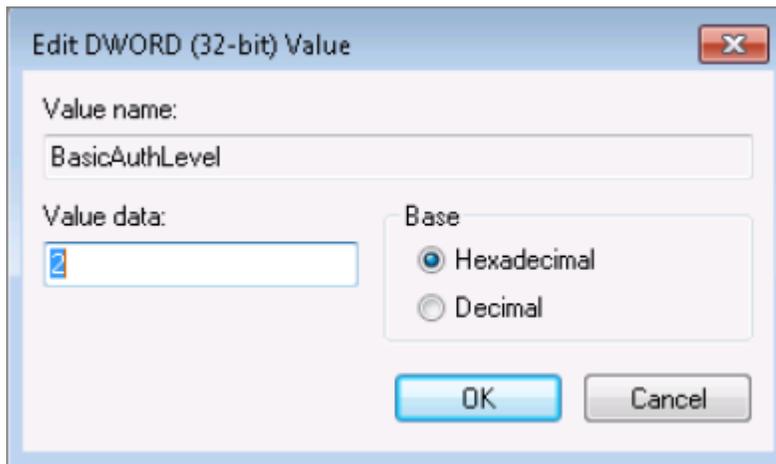
- "On Microsoft Windows 10, 8.1, 7 (64-bit, 32-bit) System" on page 2-6
- "On Macintosh System" on page 2-7
- "On GNOME Linux System" on page 2-7
- "On KDE Linux System" on page 2-8

2.3.1 On Microsoft Windows 10, 8.1, 7 (64-bit, 32-bit) System

To map Agile Drive on Microsoft Windows 10, 8.1, 7 (64-bit, 32-bit):

1. Click the Start button in Microsoft Windows 10, 8.1, 7 (64-bit, 32-bit).
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 Microsoft Windows 10, 8.1, 7 (64-bit, 32-bit).

Figure 2-4 Edit DWORD Value



4. Close regedit to save the changes.
5. Restart the service of "Web Client" in Microsoft Windows 10, 8.1, 7 (64-bit, 32-bit).
6. Launch the command in Microsoft Windows 10, 8.1, 7 (64-bit, 32-bit).
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 Microsoft Windows 10, 8.1, 7 (64-bit, 32-bit).

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 2-5 Restoring Network Connections

2.3.2 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.

2.3.3 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.

Field	Description
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.

2.3.4 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.

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

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.

3.1 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.

3.1.1 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 10, 8.1, 7 (64-bit, 32-bit):

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.

3.2 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.

How to	Steps
View or read a file	<p>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.</p> <p>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.</p> <p>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.</p>
Save a file	<p>In Agile Drive, you can save a file in two ways:</p> <p>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.</p> <p>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.</p> <p>Use the Save As function to copy a file from an Agile Drive folder to your system folder, and save it after editing.</p>
Delete a file	<p>Deletion of a file from an Agile Drive folder implies removal of a file attachment from an Agile object.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>Agile Drive does not allow deletion of a Redlined File.</p>
View properties of a file	<p>Select Properties from right-click menu of a selected file in the Agile Drive folder, to view its general properties.</p>

How to	Steps
Add a file	<p>Adding a file in an Agile Drive folder implies adding a file attachment to an Agile object. You can do this by</p> <ul style="list-style-type: none"> - copying & pasting - dragging & dropping, a file from a non-Agile Drive folder into an Agile Drive folder. <p>You can also use the Save, and Save As features to save a file from an application.</p> <p>Agile Drive does not display the added file(s) until you refresh the display.</p> <p>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.</p> <p>When you drag and drop a file with a name that contains character ";" in Agile Drive, the file name will be truncated up to ";".</p> <p>Example:- While uploading a file with the file name "bike;copy.bmp" to Agile through Agile Drive (webdav), the file will be uploaded to Agile with file name "bike".</p>
Copy a file from an Agile Drive folder to a non-Agile Drive folder	<p>In an Agile Drive folder, select the desired file.</p> <p>Select Copy from the right-click menu, or select Copy from Edit Menu of MS Windows Explorer.</p> <p>Navigate to the desired non-Agile Drive folder.</p> <p>Select Paste from the right-click menu, or, select Paste from Edit Menu of MS Windows Explorer.</p>
View folder properties	<p>To view general properties of a folder in Agile Drive, select Properties from right-click menu.</p>

3.3 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.

3.4 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.

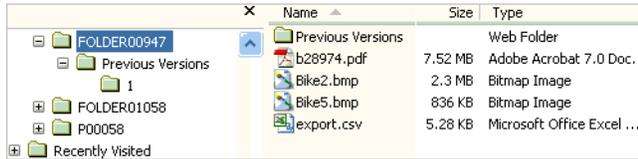


2. Add a file in FOLDER00947. The folder now contains four files.



- 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.

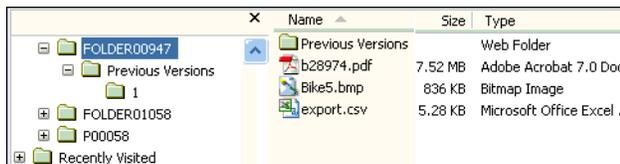


- Go to the folder 1 under Previous Versions folder. It contains the three files that originally existed in FOLDER00947 before you added the fourth file. This implies, the 'earlier' version of the File Folder object had three file attachments.



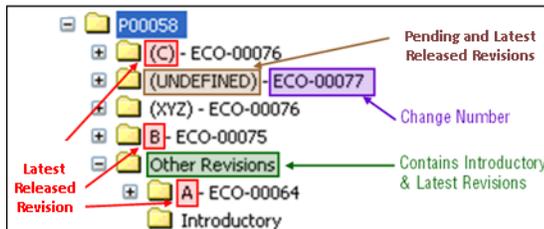
- Now, go back to FOLDER00947, which is the 'latest' version. Delete one of the files, say Bike2.bmp. This folder now has three files.

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



- 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.

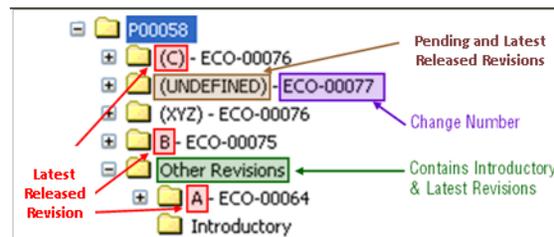
3.5 Traversing Item Revisions

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>

Example 3-3 Traversing Item Revision

In the image below, the Agile Drive folder B - ECO-00075 corresponds to Revision B of Change Object ECO-00075 associated to Agile object P00058.



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

<UNDEFINED> - <Change Object Name>

Example 3-4 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.

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 3-5 Traversing Item Revision

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.

3.6 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 3-6 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 3-7 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.

