ORACLE | agile

Product Lifecycle Management

Agile Content Services User Guide

v9.2.2

Part No. E11089-01
September 2007

Copyright and Trademarks

CONTENTS

Preface

The Oracle|Agile documentation set includes Adobe® Acrobat™ PDF files. The Oracle Technology Network (OTN) Web site (http://www.oracle.com/technology/documentation/agile.html) contains the latest versions of the Oracle|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 Oracle|Agile Documentation folder available on your network from which you can access the Oracle|Agile documentation (PDF) files.

Note To read the PDF files, you must use the free Adobe Acrobat Reader™ version 7.0 or later. This program can be downloaded from the Adobe Web site (http://www.adobe.com).

The Oracle Technology Network (OTN) Web site (http://www.oracle.com/technology/documentation/agile.html) can be accessed through **Help > Manuals** in both the Agile Web Client and the Agile Java Client. If you need additional assistance or information, please contact support (http://www.oracle.com/agile/support.html) (http://www.oracle.com/agile/support.html) for assistance.

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

TTY Access to Oracle Support Services

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, 7 days a week. For TTY support, call 800.446.2398. Outside the United States, call +1.407.458.2479.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at http://www.oracle.com/accessibility/ http://www.oracle.com/accessibility/.

Readme

Any last-minute information about Oracle|Agile PLM can be found in the Readme file on the Oracle Technology Network (OTN) Web site (http://www.oracle.com/technology/documentation/agile.html).

Agile Training Aids

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

Accessibility of Code Examples in Documentation

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

Accessibility of Links to External Web Sites in Documentation

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

Working with Transfer Orders

This chapter includes the following:

About Transfer Orders

Transfer orders keep track of what, where, and when product content is transferred by Agile Content Service (ACS). There are two types of transfer orders: automated transfer order (ATO) and content transfer order (CTO). ATOs are created automatically by system-level subscribers that are configured by your Agile PLM administrator. CTOs are created when product content is published on demand by end users.

> **Note**   You can create ATOs and CTOs only if your company has purchased an ACS server license and you have the appropriate roles and privileges.

Transfer Order Object

This section includes the following topics:

- Cover Page Tab
- Selected Content Tab
- Where Sent Tab
- Attachments Tab
- Workflow Tab
- History Tab

When you view a transfer order, you are viewing a set of tabs on the Transfer Order window (Java Client) or page (Web Client). The following table lists the tabs for transfer orders and the section where each tab is described.

Transfer order tab name	Tab information includes
Cover Page tab	General information about the transfer order.

Transfer order tab name	Tab information includes
Selected Content tab (on page 4)	Objects being transferred by the transfer order.
Where Sent tab (on page 4)	Delivery details about the transfer order and extraction.
Workflow tab (on page 19)	Where the transfer order is in the assigned workflow.
Attachments tab (on page 6)	Attached files.
History tab (on page 7)	Log of all actions taken on the transfer order.

Cover Page Tab

The **Cover Page** tab has fields that contain the general information about the transfer order. Agile PLM automatically completes some of the fields; you complete the rest.

To edit fields of an unreleased transfer order, click the **Edit** button. You may not be able to edit the contents of some fields.

Fields on the Cover Page Tab

By default, the **Cover Page** tab contains the fields listed in the following table. Agile PLM administrators can configure fields on the **Cover Page** tab.

> **Note** All fields are completed by Agile Content Service for ATOs.

Field	Contains...	Completed...
Transfer Order Type	Displays CTO or ATO.	Automatically or manually, when created.
Transfer Order Number	The number of the transfer order.	Automatically or manually, when created.
Description	Text that describes the transfer order. The maximum length is set by the Agile PLM administrator.	Manually for CTO; automatically for ATO.
Originator or **Subscriber**	The user who created the CTO (can be selected from a drop-down list) or the subscriber of the ATO. **Note**: For CTOs, the roles assigned to the user listed in this field are the roles used to limit and define what data is extracted by the transfer order. For ATOs, roles are specified in the subscriber details.	Automatically or manually, when created.

Field	Contains...	Completed...
Status	Transfer order status; if no workflow has been selected, this field is Unassigned.	Automatically, when created; updated as the transfer order moves through the assigned workflow.
Workflow	The name of the workflow being used to move this transfer order through the release process.	Manually, whether one or more than one workflow applies. If more than one workflow applies to a CTO, the workflow selection can be changed as long as the CTO is in the Pending status type. Selecting the blank field in the Workflow drop-down list switches the CTO to the Unassigned status. For more information about workflows, see *Getting Started with Agile PLM.*
Date Originated	The date the transfer order is created.	Automatically, when created.
Date Released	The date the transfer order is released.	Automatically, when released.
Final Complete Date	The date the transfer order is completed.	Automatically, when completed.

Status on the Cover Page Tab

Agile PLM uses a workflow stamp in the upper right corner of the **Cover Page** tab to indicate the status of a transfer order. Your Agile PLM administrator defines the name of each status in each workflow.

Your Agile PLM administrator may have created customized workflows and statuses for your company. The table below shows only the default transfer order workflow statuses.

Status name	Status definition
Unassigned	No workflow has been assigned to this transfer order. The originator may still be developing the transfer order (CTOs only). No statuses are displayed on the **Workflow** tab.
Pending	The workflow has been assigned. The originator may still be developing the transfer order (CTOs only). It has not yet been approved or perhaps even completed.
Review	The transfer order is under review. It has not yet been approved or completed (Default CTOs workflow only).
Released	The transfer order is being processed by Agile Content Service.
Complete	Agile Content Service automatically moves a Released transfer order to Complete status after it is successfully processed. If a transfer order cannot be successfully processed, it remains in Released status, and an error appears on the **Where Sent** tab.

Note	Do not modify any setting in the Released or Complete status in the default CTO workflow. Transfer orders extract data only while in Released status with enough time allowed for the extraction thread to process it. For more information about both CTO and ATO workflows, see the "Agile Content Service Settings" chapter of the *Administrator Guide.***Note** *You can access the latest version of Agile manuals on the Agile Documentation Web site* (http://docs.agile.com).

The **Workflow** tab shows all the statuses the transfer order has been through, and the statuses remaining to complete the extraction process. (See "Workflow Tab (on page 19)")

With appropriate privileges, you can switch a transfer order to another status with the **Workflow** tab or the **Next Status** button.

Selected Content Tab

The **Selected Content** tab lists the objects that are being transferred by the transfer order. You must have the required privileges to modify the **Selected Content** tab.

▫ The **Selected Content** tab includes the following fields that are used to define what is extracted when the transfer order is processed:

▫ **Type** — the type of the object.

▫ Icons indicating the type of object, whether it has attachments, whether it has pending changes, and, if it is an item object, whether it has AML information on its **Manufacturers** tab.

▫ **Number** — the number assigned to the object.

▫ **Description** — the description of the object.

▫ **Lifecycle/Status** — the current lifecycle phase or workflow status of the object.

▫ **Rev** — the revision of the object to be transferred when the transfer order is released.

 To view an object listed on the **Selected Content** tab, click its number.

Where Sent Tab

The **Where Sent** tab lists the transfer information of the transfer order. You must have the required privileges to modify the **Where Sent** tab.

The **Where Sent** tab includes the following fields:

▫ **Destination** — where the transfer order is published.

Agile PLM provides file, FTP, HTTP(S), JMS queue or JMS topic, and Agile system as destination types. For example, a content manager at an OEM uses Agile Content Service to publish a CTO containing a released assembly to an EMS provider for quoting. That EMS provider may have set up an FTP site (destination) where the CTOs should be published. Or upon the release of an ECO, a content manager publishes a CTO to their EAI system to update the appropriate downstream systems with the latest released assembly. That EAI system would be listed as the destination for the CTO.

Destinations are defined by your Agile PLM administrator. For more information, see the *Administrator Guide*.

▫ **Filters** — the extraction details for the transfer order.

Filters determine what tabs are extracted for the objects listed on the **Selected Content** tab. Filters are grouped by base classes (for example, Change) and classes (for example, Change Orders). If a filter for a specific class includes a tab that is not visible, the tab is omitted from the extracted data. For example, the **Page Three** tab of an ECO is not visible, but the filter for the Change Orders class allows you to extract **Page Three** tabs. When an ECO is extracted using

this filter, the data on Page Three is skipped because it is not visible in the ECO subclass.

Default filters are available for all objects. Additional filters are created by your Agile PLM administrator. For more information, see the *Administrator Guide*.

□ **Data Format/Data Extraction** — the file type of the transfer file: aXML or PDX.

Agile Extensible Markup Language (aXML) format is an XML representation of Agile PLM's business schema. aXML contains all product content managed in Agile PLM. When the transfer order is published, a .ZIP file containing the aXML file and any attachments is created.

Product Definition Exchange (PDX) packages are an industry-standard format for encoding structured data in an XML format. Like aXML, a PDX package is also a zipped file with an attachment payload. The advantage of PDX is that it is an application independent way to describe product content. The disadvantage is that it may not support all Agile objects and data. For example, Price objects and price change orders (PCOs) cannot be exported in PDX format. For more information about PDX packages, see "Working with Packages (on page 15)."

□ **Language** — determines which language is used to label object attributes, for example, field and column names. No language translation of data is performed.

□ **Site** — one of the filters used to extract data. For example, if you select the Hong Kong site, only data visible for the Hong Kong site is extracted. To extract data for all sites, select All.

□ **Date Sent** — the date the transfer order is released.

□ **Transmission Status** —the status of the transmission:

- **Pending:** the transfer order is being processed.
- **Extracting:** the data in the row (Selected Content and Filters) is currently being extracted into the specified file format.
- **Transmitting:** the data was successfully extracted and is currently being transmitted to the specified destination.
- **Success:** the data was successfully transmitted.
- **Failure**: the data extraction or transmission was not completed.

□ **Transmission Notes** — the message describing the reason for the transmission failure, if one occurs.

□ **Response —** the acknowledgment of the transfer order by the remote system.

A remote system or destination can relay an accept or reject message to Agile PLM after the expected data is received. Responses are defined by your Agile PLM administrator. For more information, see the *Administrator Guide*.

□ **Roles —** (appears on the **Where Sent** tab of ATOs only) the roles used to extract data for this transfer order.

For ATOs, roles are specified in the subscriber definition. Roles further fine tune and define the data to be extracted. For example, if the roles selected do not allow a user to read manufacturer part objects, then manufacturer part object data will not be extracted even though manufacturer part objects appear on the **Selected Content** tab. The output file will contain a section of content not readable by the role, but the details will display No Privilege.

Note For CTOs, the roles used to extract data are defined by the roles assigned to the user who is listed in the **Originator** field in the **Cover Page** tab.

Note

If multiple transfer orders are being published to the same destination and that destination fails, only the first transfer order's **Where Sent** tab indicates the failure. The status of the remaining transfer orders does not change until the first transfer order is successfully transmitted. The remaining transfer orders are queued in the order they were scheduled to transmit. The **Transmission Notes** column indicates that the transfer order is waiting for another destination. Once the failed destination is reset (your Agile PLM administrator must reset the failed destination), the transfer orders are transmitted according to their order in the queue. This is done to maintain situations where data must be transmitted in sequential order.

Note	Note	A transfer order is processed when it enters the Released status. Data extraction takes place at this time, not at the time the transfer order was created. Any changes to an object after the transfer order is created, but before the extraction process begins, are reflected in the extracted content. For example, if an ECO is at the Review status when the transfer order is created, but the ECO is promoted to the Released status before the data is extracted, then the extracted status for the ECO is Released.

Workflow Tab

The **Workflow** tab shows where the transfer order is in the assigned workflow and lists present and past signoff information. It also shows all the approvals and rejections made during each approval cycle.

The Signoff History table on the **Workflow** tab includes the following fields:

- **Reviewer —** the user who reviewed the transfer order. This can be an approver or an observer, and it can be a single user or a user group.

- **Action —** the action taken by the reviewer.

- **Required? —** whether the reviewer is a required reviewer (approver) or not (observer).

- **Local Client Time —** the date and time of the action.

- **Signoff Comments —** any comments made by the reviewers (approvers and observers) during signoff.

- **Signoff User —** the name of the user who actually approved or rejected the transfer order.

- **Status Changed By —** the name of the user who switched the status.

- **Workflow —** the name of the workflow that the transfer order is following.

- **Workflow Status —** the name of the status.

The **Workflow** tab also includes a chart of the workflow, which shows all possible status names for the transfer order. The current status is highlighted. With appropriate privileges, you can use the **Workflow** tab to promote the transfer order manually. This information also appears on the **History** tab.

Attachments Tab

The **Attachments** tab of a CTO lists the files that have been attached to that transfer order. Attached files can be drawings or scanned images, documents, non-viewable files, compressed files, and so on. You can also point to a URL instead of a local attachment.

For more information about attachments and the **Attachments** tab, see *Getting Started with Agile PLM.*

History Tab

The **History** tab shows a summary of actions taken against the transfer order, including:

▫ A description of the action

▫ Which user took the action

▫ The date and time of the action (local client time)

▫ Details of the action

▫ Comments made by users

▫ Users notified

▫ The current status of the transfer order

▫ The next status of the transfer order

While the transfer order status is Unassigned or Pending, the creation of the transfer order and any subclass modifications are recorded on the **History** tab, but no other actions are recorded. A transfer order must have a status type other than Unassigned or Pending before actions are recorded on the **History** tab.

Comments on the **History** tab are different from the comments on the **Workflow** tab. Comments on the **Workflow** tab come from approvers and observers during the online approval process. Comments on the **History** tab can be made by anyone with sufficient privileges at any time.

The **History** tab shows some response information, such as the failure reason. In Java Client, you can double-click a row in the History table to see detailed information.

| Note | If you do not have the appropriate Read privileges, you cannot view the fields on the **History** tab. If you have questions about your privileges, see your Agile PLM administrator. |

Creating Content Transfer Orders

If you have the appropriate privileges, you can create or modify a CTO.

Creating a CTO with the Create Command

When you create a CTO, you select the order type (subclass) and assign a number. Then you complete it by entering data on its tabs.

In Java Client, complete the fields on each tab.

In Web Client, the Create Content Transfer Order wizard leads you through all the steps.

For more information about creating transfer orders and other objects, see *Getting Started with Agile PLM*.

Note	Once the CTO is created, that CTO exists until you delete it. (See "Deleting Transfer Orders (on page 12)".)

Creating a CTO in Java Client

To create a CTO in Java Client:

1. Click the **New Object** button.

2. In the New dialog box, select the appropriate CTO subclass. Use the supplied autonumber, or enter a number. Click **OK**.

    The CTO is created and displayed with the **Cover Page** tab on top.

3. On the **Cover Page** tab, enter a description and select a workflow. The Default CTOs workflow is recommended. When you have finished, click **Save**.

Note	The roles applied when object data is extracted are determined by the roles assigned to the user listed in the **Originator** field on the **Cover Page** tab of the CTO.

    For example, if the originator user does not have the necessary privileges to view items assigned to the Libra product line, when BOM items are extracted, any product line Libra items will be not be extracted.

    In a similar manner, if the originator user is not assigned to the Hong Kong site, Hong Kong BOM data will not be extracted, even if Hong Kong is selected in the Site column on the **Destinations** tab.

4. On the **Selected Content** tab, click **Add** to search for objects you want to transfer. Select the objects in the search results and click **OK**.

5. If any of the selected objects are items or prices, you must select a revision for each item or price you have selected. In the Select Revisions dialog box, select an item in the left pane. In the right pane, select the item revision you want. By default, the most recent released revision is selected, but you may select a different revision.

    When you have finished selecting revisions for each item, click **OK**. The objects are added to the Selected Content table.

6. On the **Where Sent** tab, click **Add** to add a destination for the transfer. You can add multiple destinations. (See Where Sent Tab (on page 4).)

    In the Add dialog box, select the following:

    *   From the **Destination** drop-down list, select a destination. Destinations are created and defined by your Agile PLM administrator.

    *   In the **Filters** field, click the button to open the Filters dialog box. Select as many filters as you need. Your Agile PLM administrator defines the filters used on your Agile PLM system. If you have questions about which filters to use, ask your Agile PLM administrator.

        You need at least one filter for each type of object type on the Selected Content table of the CTO. On your Agile PLM system, there may be multiple filters for the same object class, each with a different name and definition. Depending on how the filter is defined, Agile ACS may extract only the table information visible on a tab, or Agile ACS may extract the information visible in the table and also the objects listed in the table. For example, a

filter for items may include the option for the **BOM** tab of Tab and Items, All Levels. In this example, when an item on the CTO **Selected Content** tab is extracted, all the items on its BOM, through all BOM levels, are also extracted.

In a similar manner, a filter can determine whether the AML information on an item's **Manufacturers** tab is extracted. In that case, you must also select a filter for manufacturer part objects and manufacturer objects.

Each type of object extracted needs a filter, whether the object type is listed on the **Selected Content** tab of the CTO or the object type is referenced on the tabs of the selected objects.

For details about filters, see the chapter "Agile Content Service Settings" in the *Administrator Guide*. For details about filters used in your Agile PLM system, ask your Agile PLM administrator.

- Select a data extraction format, either aXML or PDX. For details about these formats, see Where Sent Tab (on page 4).

Note	Note Price objects cannot be exported in PDX format.

- Select a language. For details about the language setting, see Where Sent Tab (on page 4).

- In the **Site** field, select All, or select one site. For example, if you select the Hong Kong site, only object data that is visible to the Hong Kong site will be extracted.

- When you are finished, click **OK**.

Creating a CTO in Web Client

To create a CTO in Web Client:

1. In the toolbar, choose **Create > Transfer Order**.

2. In the Create Content Transfer Orders wizard step, select the appropriate CTO subclass. Use the supplied autonumber, or enter a number. Click **Continue**.

3. In the Enter Cover Page Information wizard step, enter a description and select a workflow. The Default CTOs workflow is recommended. When you have finished, click **Next**.

Note	The roles applied when object data is extracted are determined by the roles assigned to the user listed in the **Originator** field on the **Cover Page** tab of the CTO.

    For example, if the originator user does not have the necessary privileges to view items assigned to the Libra product line, when BOM items are extracted, any product line Libra items will be not be extracted.

    In a similar manner, if the originator user does is not assigned to the Hong Kong site, Hong Kong BOM data will not be extracted, even if Hong Kong is selected in the Site column on the **Destinations** tab.

4. In the Add Selected Content wizard step, click **Add** to search for objects you want to transfer. In the Select Objects window, select the objects in the search results, and click **Next**.

    The objects are added to the Add Selected Content table.

    When you have completed the Add Selected Content wizard step, click **Next**.

5. In the Add Where Sent wizard step, click **Add** to add a destination for the transfer. You can add multiple destinations. (See Where Sent Tab (on page 4).)

In the Add Destinations and Filters to Content Transfer Order window, select the following:

- From the **Destination** drop-down list, select a destination. Destinations are created and defined by your Agile PLM administrator.

- In the **Filters** field, click the ⬚ button to open the filter selection window. Select as many filters as you need, and click **OK**. Your Agile PLM administrator defines the filters used on your Agile PLM system. If you have questions about which filters to use, ask your Agile PLM administrator.

  You need at least one filter for each type of object type on the Selected Content table of the CTO. On your Agile PLM system, there may be multiple filters for the same object class, each with a different name and definition. Depending on how the filter is defined, Agile ACS may extract only the table information visible on a tab, or Agile ACS may extract the information visible in the table and also the objects listed in the table. For example, a filter for items may include the option for the **BOM** tab of Tab and Items, All Levels. In this example, when an item on the CTO **Selected Content** tab is extracted, all the items on its BOM, through all BOM levels, are also extracted.

  In a similar manner, a filter can determine whether the AML information on an item's **Manufacturers** tab is extracted. In that case, you must also select a filter for manufacturer part objects and manufacturer objects.

  Each type of object extracted needs a filter, whether the object type is listed on the **Selected Content** tab of the CTO or the object type is referenced on the tabs of the selected objects.

  For details about filters, see the chapter "Agile Content Service Settings" in the *Administrator Guide*. For details about filters used in your Agile PLM system, ask your Agile PLM administrator.

- Select a data extraction format, either aXML or PDX. For details about these formats, see Where Sent Tab (on page 4).

Note   **Note** Price objects cannot be exported in PDX format.

- Select a language. For details about the language setting, see Where Sent Tab (on page 4).

- In the **Site** field, select All, or select one site. For example, if you select the Hong Kong site, only object data that is visible to the Hong Kong site will be extracted.

- When you are finished, click **Add**.

6. When you have completed the Add Where Sent wizard step, click **Finish**.

Creating a CTO Using the Save As Feature

Using the Save As feature is a quick way to create a new CTO that is very similar to an existing CTO or ATO. This feature is also a good way to resend data previously sent in an ATO.

Note	If you do not have Discovery and Read privileges for any of the objects on the **Selected Content** tab of the existing transfer order, an error message appears. You can either cancel the CTO creation process or you can continue. If you choose to continue, the CTO is created, however, on the **Selected Content** tab some objects rows in the table are missing due to insufficient user privileges (no Discovery and Read privileges for those objects). The missing objects are not extracted when the CTO is processed. For more information about user roles and CTO processing, see the chapter about configuring ACS in the *Administrator Guide*.

Modifying Fields

With sufficient privileges, you can modify editable fields. You can modify only fields that have been made editable by the Agile PLM administrator.

You cannot manually enter information on the **Workflow** or **History** tabs; Agile PLM automatically completes these.

Note	After a CTO has reached the Released status, it is processed by Agile Content Service and cannot be modified.

The CTO page opens with the **Cover Page** tab on top.

To modify a CTO in Java Client:

1. Complete or change the appropriate fields on the **Cover Page** tab. Click **Save** when you finish editing the **Cover Page** tab.

2. On the **Selected Content** tab:

   - To add objects, click the **Add** button , and follow the steps to search for and select the objects you want.

   - To remove objects, select and highlight the row you want to remove, and click the **Remove** button .

   - To select a different revision of an object, delete the object's row and add the object again, selecting a different revision.

3. On the **Where Sent** tab:

   - To add destinations, click the **Add** button , complete the dialog box, and click **OK**.

   - To edit a destination and its filters, click the row you want to select it, and click the **Edit** button . In the dialog box, change the fields you want to edit, and click **OK**.

   - To remove a destination, click the row you want to select it, and click the **Remove** button .

To modify a CTO in Web Client:

1. On the **Cover Page** tab, click **Edit,** and complete or change the appropriate fields. Click **Save** when you finish editing the **Cover Page** tab.

2. On the **Selected Content** tab:
   - To add objects, click **Add,** and follow the wizard steps to search for and select the objects you want to add.

- To remove objects, check the rows of the objects you want to remove, and click **Remove**.

3. On the **Where Sent** tab:

- To add destinations, click **Add**. Complete the information in the window.
- To edit destinations and filters, check the rows you want to edit, and click **Edit**. Click **Save** when you have finished editing the destinations and filters.
- To remove destinations, check the rows of the destinations you want to remove, and click **Remove**.

Deleting Transfer Orders

You can delete unreleased transfer orders. Agile PLM supports "soft" and "hard" deletes.

Note You *can* undelete a soft-deleted object. You *cannot* undelete a hard deleted object.

You can delete only transfer orders that meet the following criteria:

▫ You created it, or Agile PLM administrator has given you the appropriate privileges to delete a transfer order.

▫ The transfer order is at the Pending status type or the Unassigned status.

Printing Transfer Order Tabs

In Java Client, click the **Print** drop-down list button and select All Tabs or select the tab you want to print. The print preview dialog box opens. When you are ready, in the dialog box, click **Print**.

In Web Client, you can print transfer order tabs from your Web browser. With the transfer order open, choose **Actions > Print**. You can print the current tab or all tabs. Attachments are printed from their native applications or the Agile Viewer.

For more information about printing, see *Getting Started with* Agile *PLM*.

Agile Standard Reports for Transfer Orders

For detailed information about using all types of Agile reports, see the "Working with Agile Reports" chapter in *Getting Started*, which includes information about:

▫ Standard reports, custom reports, and external reports

▫ How your roles and privileges affect reports

▫ Report object tabs

▫ Creating and modifying report layouts

▫ Creating custom and external reports

▫ Running, scheduling, saving, and deleting reports

▫ Report output window

IP Transfer Report

The IP Transfer Report is the Agile standard report for transfer orders. This report lists the objects sent to a given destination and when they were sent.

To run the IP Transfer report:

1. Select the IP Transfer report in the **Analytics and Reports > Standard Reports > Process Reports** folder. The IP Transfer Report page appears.

2. Click the 🔃 **Execute** button. The Select Date Range and Destination page appears.

3. Select the start date and end date of the time period you want to the report to cover. This defines the time range in which transfer orders were sent.

4. Click ⋯ next to the **Destination** field and select the destinations you want to include from the **Available Values** list.

5. Click **Finish** to display the report.

Default IP Transfer report layout fields	Description
Object Number	The number of the object that was sent, for example, an item number or a change number.
Object Type	The type (subclass) of object, for example, part type Resistor or change order type ECO.
Description	Description of the object that appears in the object's **Description** field.
Date Sent	The date the transfer order was processed and the object was sent to the destination you selected in the report wizard.
TO Number	The transfer order number.

Working with Packages

This chapter includes the following:

What are Packages?

You can use packages to track, control, and route incoming product content.

Agile PLM packages may be created manually by supply chain partner users. More typically, Agile Content Service (ACS) is used to initiate automatic Agile-to-Agile communication. Product data can be sent to your Agile PLM system from another Agile PLM system. The target or receiving Agile PLM system automatically creates a package object, attaches the data files, and submits the package.

Product data can describe a proposed product. Product data may be files and documents attached to the package object. However, ACS allows product data (Agile PLM objects) to be extracted into a PDX or aXML file, which is attached to the package object. The PDX or aXML files can be imported into the target or receiving Agile PLM system, thus creating the appropriate Agile PLM objects on the target Agile PLM system. The files are accessed through the **Attachments** tab of the package.

Note   For detailed information about Agile Content Service, see the *Administrator Guide*.

Agile PLM packages are routable objects. They have workflows that determine the sequence of statuses they follow as they go through the approval cycle.

A package is different from other Agile PLM objects because it has no relationship to any other Agile PLM object. It does not have a revision level, you cannot write changes against it, it has no

---

Manufacturers tab, and it has no BOM.

In the same way that the change classes include the subclasses ECO, ECR, and MCO, the Package class may include subclasses in addition to the out-of-the-box Package subclass if your Agile PLM administrator has created them.

If package attachments include PDX, aXML or comma-delimited text files describing Agile PLM objects, the information can be imported directly from the **Attachments** tab of the released (accepted) package once the package is released.

Intended Audience

This chapter assumes that you are a Product Collaboration user who works with Agile PLM package objects. You may be a user who creates and submits packages, an approver or an observer of packages that are routed for approval, or a content manager, who is like a change analyst who works with packages. The package objects you work with may be created by users who are supply chain partners, or the package objects may be created automatically by Agile Content Service (ACS).

Package License Requirements

Agile PLM package objects are provided with the basic Agile Product Collaboration server license, which allows any user, with the appropriate assigned privileges, to create, use, and search for package objects.

Agile-to-Agile communication is provided by the ACS server license. The ACS license allows the Agile PLM administrator to define the details of the automatic package object generation process. (For more information, see the *Administrator Guide*.)

Who Uses Package Objects?

Agile PLM packages are available to users with the appropriate roles and privileges. The *content manager* uses Agile Java Client or Agile Web Client to oversee the routing and approval of packages. Supply chain partners can create and submit packages or use Agile Content Service (ACS) to submit them automatically.

ACS provides automatic Agile-to-Agile communication, which sends Agile PLM data from one Agile PLM system to another. The destination or receiving Agile PLM system automatically creates package objects that include the data files on the **Attachments** tab. The Agile PLM administrator of the destination Agile PLM system defines the details of the automatic package object generation process. (For more information, see the *Administrator Guide*.) Once the package object is automatically created and submitted, the approval and routing procedures are the same as for any other routable object.

Viewing Packages

This section contains the following topics:

- □ Package Tabs

- □ Status of a Package

Package Tabs

Like any other Agile PLM object, a package object is displayed with tabs. This section contains the following topics:

- □ Cover Page Tab

- □ Workflow Tab

- □ Attachments Tab

- □ History Tab

The following table lists the tabs for Agile PLM packages.

Package tab name	Tab information includes
Cover Page (see "Cover Page Tab" on page 17)	General information about the package. Source GUID, XFER Order Locator, and Response Expected are optional fields used by Agile ACS.
Workflow (see "Workflow Tab**" on page 19)**	Where the package is in the assigned workflow. Signoff approvers and observers, and the results of their reviewing of the package.
Attachments (see "Attachments Tab" on page 19)	Attached files. Content from PDX, aXML and CSV files can be imported from the **Attachments** tab to the Agile PLM database. For information about importing package attachment data into the Agile PLM database, see Importing Product Information from Package Attachments (on page 27).
History (see "Attachments Tab" on page 19)	Shows actions taken on the package—for example, when attachments were added and removed.

Note	Your Agile PLM administrator may have added additional **Page Two** and **Page Three** tabs, which contain custom fields defined by the administrator.

Cover Page Tab

The package **Cover Page** tab includes some basic information about the proposed product. The files and images describing the proposed product are included on the **Attachments** tab. The attachments might include specifications, schematics, assembly drawings, test procedures, or any other file type required. The content manager routes a package for review through workflow.

Cover Page field	Completed	Contains
Package Number	Usually automatically; may be an autonumber or a manually entered number.	Package number assigned to the package when it is created.
Status	Automatically, when created; updated as package moves through the assigned workflow.	The status of the package. See Status of a Package (see "Final Status of Packages" on page 28). If no workflow is selected, this field is Unassigned.

Cover Page field	Completed	Contains
Originator	Usually manually, but may contain a default.	The user who created the package (can be selected from a drop-down list).
Partner Name	Usually manually, but may contain a default.	The partner (generally, a company) to which the Originator is assigned.
Date Originated	Usually automatically, when created (with default set by the Agile PLM administrator).	The date the package was created.
Date Released	Automatically.	Date the package was released, or accepted.
Assembly Number	Manually.	Number of the proposed assembly.
Assembly Revision	Manually.	Revision of the proposed assembly.
Description	Manually, but can contain a default defined by the Agile administrator.	Up to 1023 characters, including spaces and carriage returns (which count as two spaces).
ECO Number	Manually.	An ECO number associated with the assembly.
Package Type	Usually manually, but may contain a default.	Drop-down list of package types defined by the Agile PLM administrator.
Program Manager (may also be called Content Manager)	Automatically when package changes from pending to submit status.	Name of the content manager assigned to the partner in the **Partner Name** field. A content manager oversees the package routing process (similar to a change analyst).
Category	Manually	The category of this package. A package cannot be changed to a Released workflow status unless the Category field and all other required fields have values.
Workflow	Manually, whether one or more than one workflow applies. If more than one workflow applies to a package, the workflow selection can be changed as long as the package is in the Pending status type. Selecting the blank field in the Workflow drop-down list switches *the package to the Unassigned* status. For more information about workflows, see Getting Started with Agile PLM.	The name of the workflow being used to move the package through the approval process.
Final Complete Date	Automatically.	Date the package was switched to the Complete status type.
Source GUID	Automatically.	Required for Agile Content Service (ACS) tasks. Unique identifying code representing the source Agile PLM system when a package object is created by an Agile-to-Agile product content transfer. If ACS is not being used, this field may not be visible. See the *Administrator Guide* for details.

Cover Page field	Completed	Contains
XFER Order Locator	Automatically.	Required for ACS tasks. Identifies the transfer order that created the package. If ACS is not being used, this field may not be visible. See the *Administrator Guide* for details.
Response Expected	Automatically.	Required for ACS tasks. Indicates whether the source Agile PLM system expects a response when the package is either accepted or rejected. If ACS is not being used, this field may not be visible. See the *Administrator Guide* for details.

Workflow Tab

The **Workflow** tab displays a flowchart of the statuses in the selected workflow. The Signoff History table on this tab list the users who are assigned to either approve or observe the proposed package, the actions taken by the approvers, the date and time of each action, and any comments made by the approvers and observers. The **Workflow** tab of a package is identical to the **Workflow** tab of a change.

Either approvers and observers are automatically assigned by the workflow, or they are assigned when the content manager routes the package for approval. For details, see the "Routing Objects with Workflows" chapter in *Getting Started with Agile* PLM.

Attachments Tab

The **Attachments** tab lists the files and URLs that have been attached to the package. You can also import data into your Agile PLM system from text, PDX, aXML, or .CSV files attached to the package.

For general information about working with attachments, see *Getting Started with Agile PLM*.

For information about importing data from a package, see

History Tab

The **History** tab shows a summary of actions taken against the package, including a description of the action, which user took the action, the current status of the package, the next status, and other information.

The types of actions recorded on the History tab are:

▫   Modify an attachment on the **Attachments** tab

▫   Add or delete approvers

▫   Approve and reject

▫   Change a field, any tab

▫   Change a status

- ▫ Autopromotion fails

- ▫ Change a subclass

- ▫ Comments

- ▫ Send

- ▫ Print

Comments on the **History** tab are different from the comments on the **Workflow** tab. Comments on the **Workflow** tab come from approvers and observers when they perform the online approval process. Comments on the **History** tab can be made by anyone with sufficient privileges at any time.

Status of a Package

Each package has a status stamp in the top right corner to indicate the status of a package. Your Agile PLM administrator defines the name of each status in each workflow.

The following table shows the Default Packages workflow statuses.

Status name	Status definition
Unassigned (No status type)	No workflow has been assigned to this package. The originator may still be developing the package. No statuses are displayed on the **Workflow** tab.
Pending (Pending status type)	The originator may still be developing the package. The package has not been submitted to the content manager.
Submitted (Submit status type)	The package has been submitted to the content manager. (If the content manager switches a submitted package to the Pending status, the originator can modify the package and submit it again.)
Review (Review status type)	The package has been routed for review through workflow.
Accepted (Released status type)	The package has been signed off by the approvers and has been released.
Closed (Complete status type)	The package is no longer used.
Hold (Hold status type)	The package has been placed on hold while the content manager gathers information.
Canceled (Cancel status type)	The package has been canceled due to a fundamental flaw or because one or more approvers have rejected it.

Packages in Your Inbox

You can view packages that have been submitted to you in the Agile PLM Inbox.

To view packages in the Inbox in Java Client:

1. Click the **Inbox** drop-down arrow.
2. Choose **Workflow Routings** from the list.
3. In the Inbox table, click the **Workflow** column header to sort the table by workflows.

To view packages in the Inbox in Web Client:

1. From the Web Client toolbar, click **Home** to display the welcome page.
2. Click **Workflow Routings** to display your Workflow Routings Inbox.
3. In the table, click the Workflow column header to sort the table by workflows.

Package Workflow

Agile PLM packages may have custom workflows, just as changes may have custom workflows. For details, see the "Routing Objects with Workflows" chapter in *Getting Started with Agile PLM*.

Packages are created by partners. Typically, partners are customers at other companies who use Agile PLM to create packages.

Here is the typical workflow of a package:

1. A partner at another company creates an Agile PLM package.
2. When the package is complete, the partner submits it to the content manager.
3. The content manager opens and reviews the package. If the package data is not complete, the content manager may return the package to the partner for more information.
4. If the package is complete, the content manager switches it to the next status in the workflow. Typically, the next status is a Review status type, which routes the package for approval.
5. The approvers review the package and either accept it or reject it.
6. When the package is accepted by the approvers, depending on workflow settings, either the content manager accepts (releases) it, or it is autopromoted to the next status in the workflow and released (accepted).
7. The content manager processes the package data according to unique company-specific procedures.

   If the package includes PDX files, aXML files, or comma-delimited text files describing Agile PLM objects, these may be imported from the package **Attachments** tab. Package attachments created by Agile-to-Agile communication (through Agile ACS) can be either PDX files or aXML files.

   a. On the package **Attachments** tab, select one attached file.
   b. Click the **Import** button on the **Attachments** tab.

      The import process begins.
   c. Follow the onscreen instructions.

Note	For more information about the Import wizard, see the *Import and Export Guide*.

8.   When the package is processed and no longer used, the content manager closes it.

Note	Your Agile PLM administrator may define custom workflows for packages. Custom workflows may have multiple Submit, Review, and Released status types. For details, see the "Routing Objects with Workflows" chapter in *Getting Started with Agile PLM*.

The Package Workflow Diagram (on page 23) summarizes the typical workflow of an Agile PLM package, using the Default Packages workflow.

Note	The content manager is the user named in the **Program Manager** field on the **Cover Page** tab. Your Agile PLM administrator may have changed the name of this field.

Package Workflow Diagram
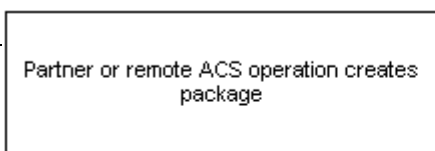
Partners and Content Managers

The Agile PLM administrator assigns the Partner role or Content Manager role to the appropriate Agile PLM users.

What Is a Partner?

Partners are typically users at an EMS customer site who create Agile PLM packages of proposed products and submit them to your company for review and approval. However, a user in your company with the appropriate user license privileges may also create and submit packages.

What Is a Content Manager?

The Agile PLM administrator assigns specific partners to specific content managers. The role of a content manager is similar to that of a change analyst or component engineer. Content managers manage packages throughout their workflow. (In previous releases, the content manager was referred to as the program manager.)

Creating a Package

To create a package, you must have the appropriate privileges.

Creating a Package Object in Java Client

You can create a package with the **File > New > Package** command or the **File > Save As** command.

The process for creating new objects involves two main steps: creating an empty object, then filling in the object tabs with information specific to the object.

To create and complete a package:

1. Click the **New Object** button .
2. In the New dialog box, use the **Type** drop-down list to select the type (subclass) of package you want to create.
3. Assign a number to the package. To do so, either use the supplied autonumber, click the **AutoNumber** button , or type a number.

   The autonumber format and sequence are determined by your Agile PLM administrator. Your Agile PLM administrator also determines whether using autonumbers is required or optional.
4. Click **OK**.

   The new package appears with the **Cover Page** tab showing.
5. Fill in information on the package tabs, as desired.

You do not enter information on the **History** tab. That tab is completed automatically.

Creating a Package Object in Web Client

You can create a package with the **Create > Package** command or the **Actions > Save As** command.

A wizard leads you through the process of creating a package and adding attachments.

To create and complete a package:

1.   Choose **Create > Package**.

2.   Follow the onscreen instructions to complete the wizard.

    You do not enter information on the **History** tab. That tab is completed automatically.

When you click the **AutoNumber** button to enter the package number, you might see a list of autonumber choices. The autonumber format and sequence are determined by your Agile PLM administrator. Your Agile PLM administrator also determines whether using autonumbers is required or optional.

Submitting a Package

You can submit an Agile PLM package using the same buttons and procedure you use to submit a change or other routable object (provided you have the appropriate privileges). For details, see the "Routing Objects with Workflows" chapter in *Getting Started with Agile PLM*.

No matter which Agile PLM product was used to create the package, when a partner submits a package, the content manager is notified by email.

The content manager can also use defined searches in the **Searches | Content Manager Searches** folder to find recently submitted packages.

Using the same buttons and selections used to work with changes, the content manager can choose an action for the package, including:

▫   Audit the package.

▫   Return the package to the originator (partner) for more information.

▫   Route the package for review to a list of approvers and observers.

▫   Accept the package.

▫   Cancel the package.

See the Package Workflow Diagram (on page 23) for a summary of the default package workflow.

Approving and Rejecting a Package

Users on the approver and observer lists on the **Workflow** tab approve or reject a package the same way they would approve or reject a change.

Approvers who do not respond to a package within the reminder period receive a reminder email, telling them that they have not yet approved or rejected the package. If the approvers do not respond within the review escalation period, then their appropriate designated escalation person

receives an email and can then accept or reject the package in the place of the original approvers. For details, see the "Routing Objects with Workflows" chapter in *Getting Started with Agile PLM*.

Importing Product Information from Package Attachments

If a package contains PDX, aXML or CSV (comma-delimited text) files describing Agile PLM objects, after the package is released (accepted), you can import the PDX, aXML or CSV information directly into your Agile PLM database.

To import product information from package attachments:

1.   Open the released package.

2.   Display the **Attachments** tab.

3.   Select a PDX, aXML or CSV attachment to import, and click **Import**. (You can import only one attachment at a time.)

   The Agile Web Client Import wizard opens, and the file you selected is specified as the file to import. You cannot specify a different file at this point.

Follow the wizard steps to import the data. For more information about importing, see the *Import and Export Guide*.

When the Import process is complete, you are returned to the **Attachments** tab of the package.

Configuring Your Agile PLM System for Agile-to-Agile Communication

To successfully publish content data from one Agile PLM system (the source Agile System) to another Agile PLM system (the target Agile System), the appropriate Agile Content Service settings and process extension settings must be defined. It can be done only by the Agile PLM administrator.

For complete details, see the "Agile Content Service Settings" chapter in the *Administrator Guide.*

After Accepting/Rejecting Package Objects

In cases where Agile ACS is used to automatically perform Agile-to-Agile communication, the source Agile PLM system can request a response from the target Agile PLM system. The required settings are defined by the Agile PLM administrators of each system. Depending on the settings, a response may be sent to the source Agile PLM system automatically (which requires no action on your part), or you may be required to send a response manually. (For information about how to set up package responses, see the "Agile Content Service Settings" chapter in the *Administrator Guide*.)

If you are required to send a response manually, follow the instructions below.

To send accept or reject responses manually in Java Client:

1.   Open the package.

2.   Click the **More** button [icon] at the top of the object window to display the More Actions menu and choose either **Process Extensions > Accept Package Response** or **Process Extensions > Reject Package Response**.

Or, right-click in the window, and choose either **Process Extensions > Accept Package Response** or **Process Extensions > Reject Package Response** from the shortcut menu.

Note   The **Process Extensions > Package Responses** commands on the More Actions menu and the shortcut menu are available only if your Agile PLM administrator has enabled them.

To send accept or reject responses manually in the Web Client

1.   Open the package.

2.   From the **Actions** menu, choose either **Accept Package Response** or **Reject Package Response**.

Note   The **Package Response** commands on the **Actions** menu are available only if your Agile PLM administrator has enabled them.

About Searching for Packages

If you have the appropriate privileges, you can search for Agile PLM packages the same way you search for any object in the Agile PLM database. For details, see *Getting Started with Agile PLM*. If you have questions about your privileges, see your Agile PLM administrator.

The **Searches** folder includes a **Content Manager Searches** folder, which contains the Packages Submitted More Than X Hours Ago search and the CTOs Submitted More Than X Hours Ago search.

Final Status of Packages

Once a package has been reviewed and approved by the approvers and accepted by the content manager, the content manager can process the package data using the internal procedures specific to your company. Also, the content manager can import the package data content from other Agile PLM systems from the package object **Attachments** tab by using the **Import** button. (See *Importing Product Information from Package Attachments* (on page 27).) For example, the attachments on the package **Attachments** tab may become attachments for Agile PLM items in your Agile PLM database, or attachments that are PDX, aXML or CSV files could be imported into your Agile PLM database.

The procedures used to process package data are unique to each company. Ask your Agile PLM administrator or your system administrator for information about how this task is performed at your company.

When you have completed processing the package, the content manager can change its workflow status to the Closed status type by using either the **Next Status** button or **Workflow** tab.

Deleting Packages

Agile Java Client and Web Client support "soft" and "hard" deletes.

Note   **Caution!** You cannot undelete a hard-deleted object.

You can delete packages that meet the following criteria:

▫   You created it; or you are the content manager, and your Agile PLM administrator has given content managers the appropriate privileges to delete a package.

▫   The package is at the Pending status type or the Unassigned status.

To soft-delete an unreleased package in Java Client:

1.   Open the package that you want to delete.

2.   Click the **Delete** button in the package object window, and respond **Yes** to the confirmation prompt.

The package is soft-deleted. It is no longer available for use. However, until it is hard-deleted, its number is reserved and cannot be reused.

To soft-delete an unreleased package in Web Client:

1.   Open the package that you want to delete.

2.   Choose **Actions > Delete**, and respond **OK** to the confirmation prompt.

The package is soft-deleted. It is no longer available for use. However, until it is hard-deleted, its number is reserved and cannot be reused.

To hard-delete a soft-deleted package in Java Client (if you have the appropriate privileges):

1.   From the **Recycle Bin Searches** folder, run the Deleted Packages search to locate the soft-deleted package you want to hard-delete.

2.   Open the package.

3.   Click the **Delete** button in the package object window, and respond **Yes** to the confirmation prompt.

To hard-delete a soft-deleted package in Web Client (if you have the appropriate privileges):

1.   From the **Recycle Bin Searches** folder, run the Deleted Packages search to locate the soft-deleted package you want to hard-delete.

2.   Open the package.

3.   Choose **Actions > Delete**, and respond **OK** to the confirmation prompt.

Undeleting Packages

Since soft-deleted packages still exist in the database, you can undelete them if you have the necessary privilege. You can undelete packages associated with partners to which you are assigned.

To undelete a package in Java Client:

1.   Find the soft-deleted package by running the Deleted Packages search in the **Recycle Bin Searches** folder.

2.   Open the deleted package you want to restore.

3.   To undelete the package, choose **Edit > Undelete**.

The previously soft-deleted package is undeleted and is once more available to users.

To undelete a package in Web Client:

1.   Find the soft-deleted package by running the Deleted Packages search in the **Recycle Bin Searches** folder.

2.   Open the deleted package you want to restore.

3.   To undelete the package, choose **Actions > Undelete**.

The previously soft-deleted package is undeleted and is once more available to users.