



# **Agile Product Lifecycle Management**

MCAD Readme

v2.4

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# 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) (<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.

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**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) (<http://www.adobe.com>).

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The [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technology/documentation/agile.html) (<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>) (<http://www.oracle.com/agile/support.html>) for assistance.

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**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.

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## 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) (<http://www.oracle.com/technology/documentation/agile.html>).

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

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# Introduction

### This chapter includes the following:

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- Agile Version Support ..... 1

Release 2.4 of the Oracle | Agile Engineering Collaboration MCAD Connectors provides many new features for the Pro/ENGINEER, SolidWorks, CATIA, and Unigraphics NX CAD connectors, as well as the EC Client.

## Agile Version Support

The MCAD 2.4 Connectors support the following Agile versions:

1. Agile PLM 9.2.1.x
2. Agile PLM 9.2.2.x





# What's New

**This chapter includes the following:**

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## Save Process

**Improvements to the Save process include:**

1. Rename files on initial save

Upon the initial save of CAD files into Agile, the CAD filename can be changed to match the desired PLM numbering scheme. Supported for Pro/ENGINEER, CATIA, and Unigraphics NX. For SolidWorks, a similar use case is supported but the filenames are renamed upon the subsequent Load command.

2. Copy with file renaming

During the save process, selected assemblies, drawings, and components within the design can be selected for copy, generating a new derived design. CAD filenames can be generated from the PLM numbering scheme. Supported for Pro/ENGINEER, CATIA, and Unigraphics NX. For SolidWorks, a similar use case is supported but the filenames are renamed upon the subsequent Load command.

3. Save Preferences form

A new preferences form within the Save dialog provides settings for document class preferences, viewable file creation preferences, and default property mappings.

4. Quicksave

A new Quicksave command saves the current design without popping up the Save dialog. This is typically used for interim saves where no input is necessary.

5. Save Session

The Save Session command includes everything from the current CAD session into the Save dialog. This allows, for example, easily saving all related drawings that may be currently in work.

6. Template selector in New

The New command dialog now provides greater flexibility to define template files for parts, assemblies, and drawings. Any number of templates can be created and made accessible in

the dialog.

7. New "All" options for object already exists dialog

When a user attempts to save an object that already exists in PLM (and is not already known on the client side), a dialog appears giving the options to Save, Assign, or Abort. This dialog has been enhanced with three more options allowing the users to automatically repeat the selected option for all files.

## Load Process

### Improvements to the Load process include:

1. Load associated drawings to current model

This command retrieves from Agile into CAD all drawings related to the 3D model (part or assembly) in the active CAD session.

2. Load associated drawings in Load dialog

This new option on the Load dialog allows the user to additionally load any drawings related to the selected 3D model, or all 3D models being loaded.

3. Load file status and options

New options in the Load dialog give the user a status of each file to be loaded, comparing the file's status in Agile to what may be already in the local working directory. Based on this status, the load option is set to either load the file, or just use the file already in the local working directory.

This is a big time-saver when loading models where some files have been previously loaded. It also prevents accidental overwriting of locally modified files.

4. Quickload

The new Quickload option bypasses the Load dialog and immediately loads the requested files.

5. Insert in Assembly

The user now has the option to insert from Agile into the current assembly, using the same process as the Load command.

6. Force specific BOM resolution

An additional administrative option allows for prompting the user for the specific structure resolution to use during the load process (As Saved, As Released, Latest Pending). Allowable options can be controlled separately for loading pending and released revisions.

## Change Process

### Improvements to the Change process include:

1. Pending revision creation during Save, Load

Pending revisions can now be created in the Save dialog and the Load dialog, in addition to the Manage Change dialog. In the case of Save, this allows the user to open up a new revision on a file that inadvertently changed due to operations on related parts or assemblies. In the case of Load, this allows the user to open up a new revision (and set the checkout reservation) when

they intend to work on the file.

2. Manage current object

This new command opens up the Manage Change dialog just for the current object (not including any structure). This allows easily creating a new revision, setting checkout, etc., without waiting for the entire structure to load.

3. "Current Change" available to all dialogs

The "Current Change" settings have been moved to main EC Client toolbar, so that the settings apply to all dialogs.

4. Submit changes

A new "Submit Changes" checkbox is available in the Save dialog, which allows the user to automatically submit any change objects to their workflow at the end of the save process. For example, minor changes can be submitted to their Released status, and major changes can be submitted to their signoff workflow.

## Part/BOM Process

### Improvements to the Part/BOM process include:

1. Relationship links

A new administrator option allows the linking between the CAD Document object and corresponding Part object to be made using a Relationship.

## EC Client Process

### Improvements to the EC Client process include:

1. Support for additional data types in EC dialogs and edit mode

All Agile data types are now support in the EC dialogs and edit mode, including Multi-list, Date, and Numeric.

2. Basic Viewing

A basic viewing capability allows launching file attachments using the client-side MIME type application.

3. "Make current change" always enabled

The "Make current change" button on Change objects is always active, allowing the current change object to be set at any time (not just when Manage Change is active).

4. Editability of revision field

The revision field in EC dialogs is directly editable when the revision is pending.

5. CAD extension field added to dialogs

A new "CAD Type" column is added to the EC dialogs to support easy sorting by CAD extension.

6. Use file folder version instead of timestamp

File out-of-date status tracking has been improved, by using the file folder version as the key

field rather than the CAD Timestamp attribute.

7. Bookmark folders supported

Hierarchical bookmark folders as now supported

8. Allow setting lifecycle phase for multiple selected object

There is a new context menu in the EC dialogs which allows setting the lifecycle phase for multiple selected objects.

## Attribute Handling

**Improvements to the Attribute Handling process include:**

1. Support for Part attribute mapping

Attributes from the Part object related to the CAD Document object can now be mapped to and from the CAD file.

2. Change history fields in title blocks

Change history fields, such as the list of past revisions, can now be extracted from Agile and placed onto drawing title blocks.

3. Extract "Revision Description" and "New Revision"

The "Revision Description" and "New Revision" fields from the Change object Affected Items tab are now accessible.

## CAD Specific

**CAD Specific improvements include:**

1. CATIA V4 files inside CATIA V5

The CATIA connector now supports the ability to save CATIA V4 files within CATIA V5 models.

2. SolidWorks Preload tool

The Preload tool has been enhanced with an option to stop the dataload process when no associated Part object is found.

3. Pro/E simplified reps

Support for Pro/E simplified reps is now added to the Load dialog.

# Issues

**This chapter includes the following:**

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## Resolved

Issue: The EC client contained a looping algorithm for login, which when an incorrect password was entered could cause a username to be locked.

Resolution: This problem has been solved

