



Agile Product Lifecycle Management

What's new in Import and Export

v9.3

E15251-02

July 2009

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CONTENTS

Copyright and Trademarks	ii
What's New in Import and Export Modules	5
User Interface Changes in Import Module	5
Icon and Button Changes in Import and Export Modules	6
Accessing the Import Wizard.....	7
The Import Wizard	8
Changes in Import Wizard's Opening Interface.....	8
File Selection and Configuration - Step 1	12
Content Specification Options - Step 2.....	13
Content Selection Options - Step 3	15
Attribute Mapping Selection - Step 4	18
Import Review Definitions Interface - Step 5	20
Import Validation Log.....	21
Import Log	21
Functionality Changes in Import Module	22
New Functionality in Import Module	22
Changed Functionality in Import Module	22
User Interface Changes in Export Module	22
Accessing the Export Wizard.....	22
The Export Wizard	22
Functionality Changes in Export Module.....	27
New Functionality in Export Module	28

Preface

The Agile PLM 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 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.

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What's New in Import and Export Modules

This chapter includes the following:

▪ User Interface Changes in Import Module	5
▪ Accessing the Import Wizard	7
▪ The Import Wizard	7
▪ Functionality Changes in Import Module	21
▪ User Interface Changes in Export Module	22
▪ Functionality Changes in Export Module	27

This document provides a summary of UI and functionality changes between Release 9.2x and Release 9.3 of the Agile PLM Import/Export application. Changes, new content, and updates address the redesigned and highly enhanced Release 9.3 Web Client user interfaces. There were no changes in Java Client.

User Interface Changes in Import Module

User interface changes in between Release 9.2x and 9.3 in the two modules include:

User Interface Changes in Import Module

- Accessing the Import Wizard
- The Import Wizard
 - Opening dialog
 - Buttons
 - Preferences settings and options in subsequent steps of the Wizard














User Interface Changes in Export Module:

- Accessing the Export Wizard
- The Export Wizard
 - Opening dialog
 - Buttons
 - Preferences settings and options in subsequent steps of the Wizard
 - Interfaces in file selection, preparation, and export step

Icon and Button Changes in Import and Export Modules






Icons and Buttons in Import Module

This table lists and displays changes in Import module's icons and buttons in Release 9.2.x and Release 9.3.

Import Step	9.2.x Buttons	9.3 Equivalent
Accessing the Wizard	Tools See Accessing the Import Wizard on page 7	Tools See Accessing the Import Wizard on page 7
Step 1 Input selection	OK  in file Configuration dialog	Removed in 9.3
Step 2 Content specification	No change	No change
Step 3 Content option selection	No change	No change
Step 4 Attribute/ Mapping selection	Finished 	
Step 5 Review import settings	No change	No change
Validation Log/ Summary Report	Restart  Done 	Import another File  Close 
Import Log/ Summary Report	Same as Validation Log/ Summary Report	Same as Validation Log/ Summary Report
Specify Preference Settings	OK  Cancel 	Save  Close 
Throughout the Wizard	Details 	Details 

Icons and Buttons in Export Module

This table lists and displays changes in Export module's icons and buttons in Release 9.2.x and Release 9.3.

Export Step	9.2.x Buttons	9.3 Equivalent
Accessing the Wizard	Tools See Accessing the Import Wizard on page 7	Tools See Accessing the Import Wizard on page 7
Add objects	OK  in Add Objects	Removed in 9.3
Throughout the Wizard	Exit 	Cancel 
Throughout the Wizard	Details 	Details 

Accessing the Import Wizard

Access to the Import Wizard in Release 9.3 and Release 9.2x is from the **Tools** menu. However, the **Tools** button and its location on the tool bar are changed. The following screen shots show the change in appearance and location.

Figure 1: Release 9.2x Tool bar

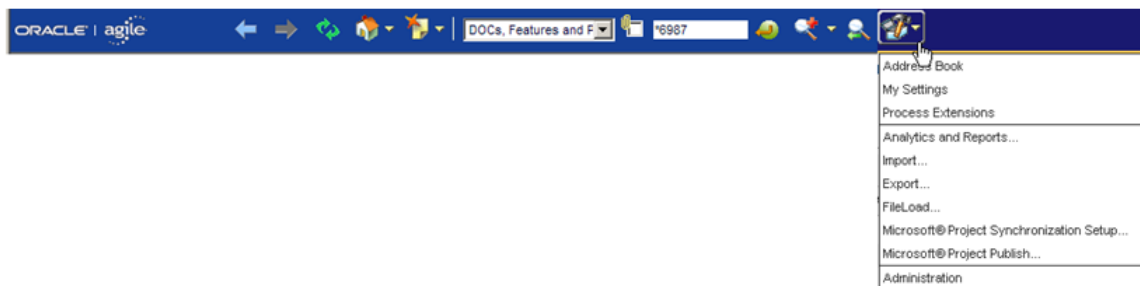
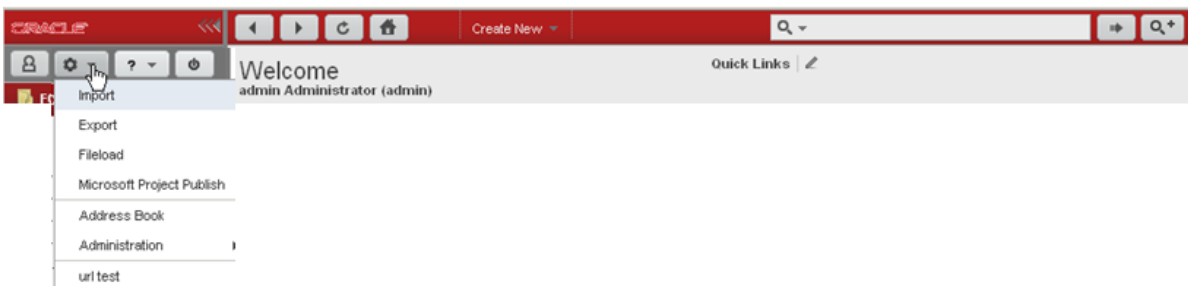


Figure 2: Release 9.3 Tool bar



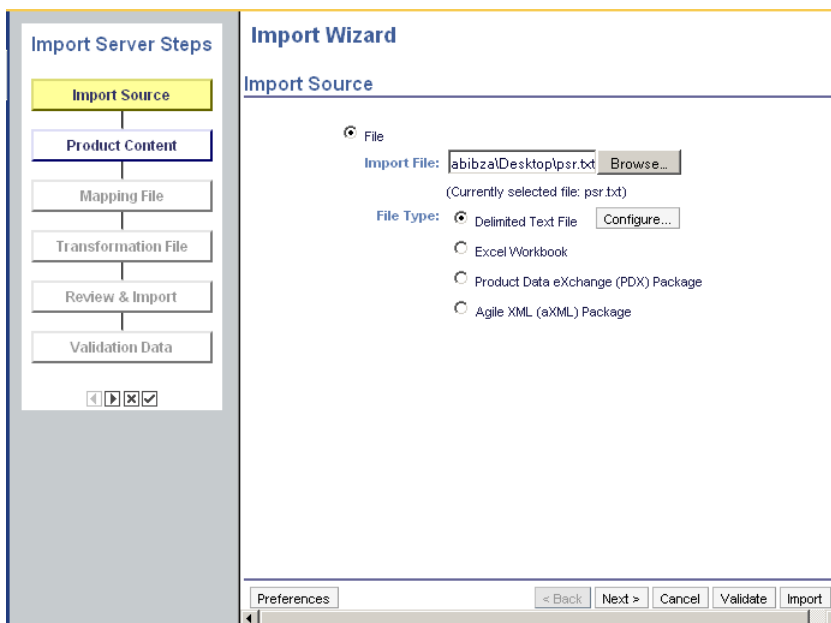
The Import Wizard

The Import Wizard has a separate dialog and based on the extension of the selected file options are displayed automatically. The UI changes in the different steps of the import process appear below.

Changes in Import Wizard's Opening Interface

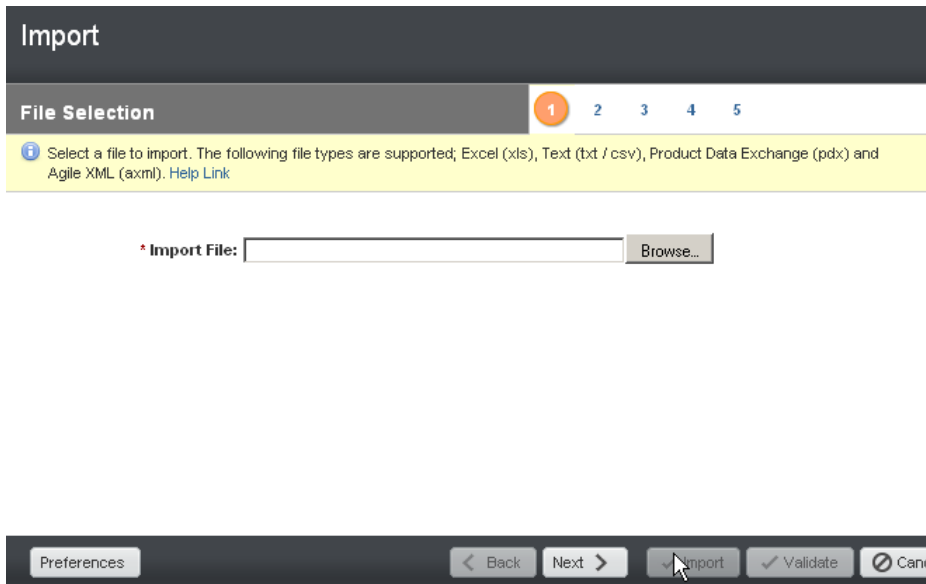
In Release 9.2x, Import Wizard steps were shown in the left pane, the Import Wizard opened in the right pane and you could specify configurations before or after selecting the import file.

Figure 3: Release 9.2x Import Wizard interface



In Release 9.3, the Import Wizard opens in its own dialog and file type is specified after selecting the import file. Options for the selected file type are automatically displayed by the Wizard. The UI also displays the Import Wizard steps in the dialog itself. The name and functions of buttons remain the same. However, their appearance is slightly modified.

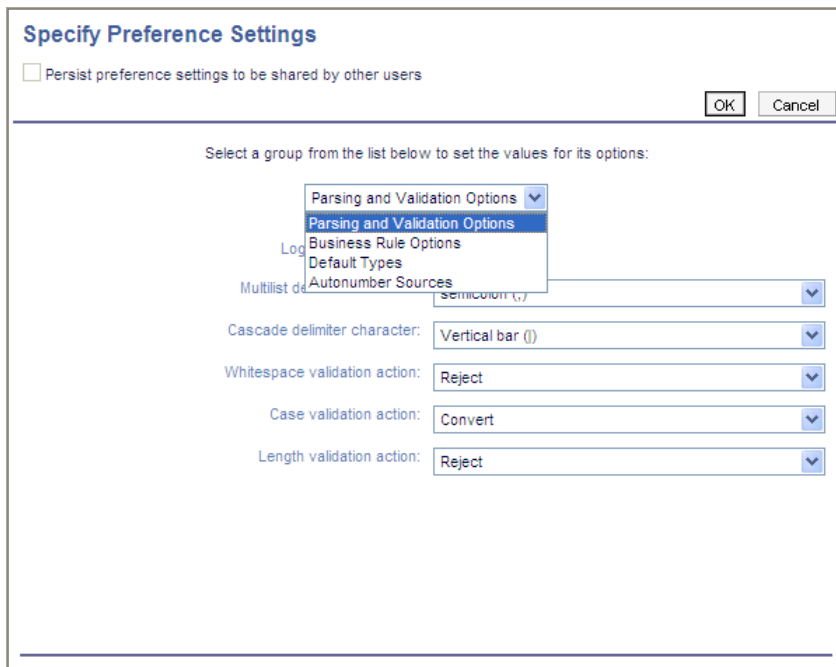
Figure 4: Release 9.3 Import Wizard interface (dialog box)



Import Preference Settings

In Release 9.2x, the dialog was called **Specify Preference Settings**, options were accessed using a drop down menu, and a **Persist preference settings to be shared by other users** appeared in the top left portion of the dialog.

Figure 5: Release 9.2x Preference settings dialog



In Release 9.3, this dialog is called **Import Preference** and appears in a menu bar, and the **Persist preference settings to be shared by** is located in the lower left corner. The **OK** and **Cancel** buttons are replaced with **Save** and **Close**. For other changes in icons and buttons, see [Icons and Buttons in Import Module](#) on page 6.

Figure 6: Release 9.3 Preference settings dialog

Import Preference

Parsing and Validation Business Rule Default Types Autonumber Sources

Log Transformations: ☒

Multilist Delimiter Character: semicolon (;)

Cascade Delimiter Character: Vertical bar (|)

Whitespace Validation Action: Reject

Case Validation Action: Convert

Length Validation Action: Reject

☐ Persist preference settings to be shared by

Save Close

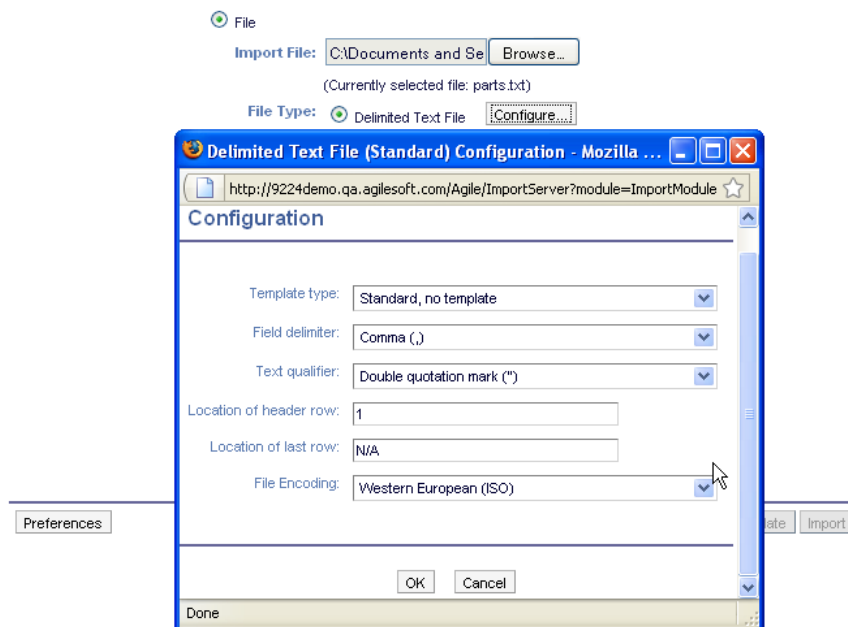
File Selection and Configuration - Step 1

In Release 9.2x, to configure the selected file, you had to specify file type and then press the **Configure** button.

Figure 7: Release 9.2x Input file configuration interface

Import Wizard

Import Source



In Release 9.3, the configuration options are automatically displayed based on the selected file type. The configuration options do not appear when you select PDX or aXML files.

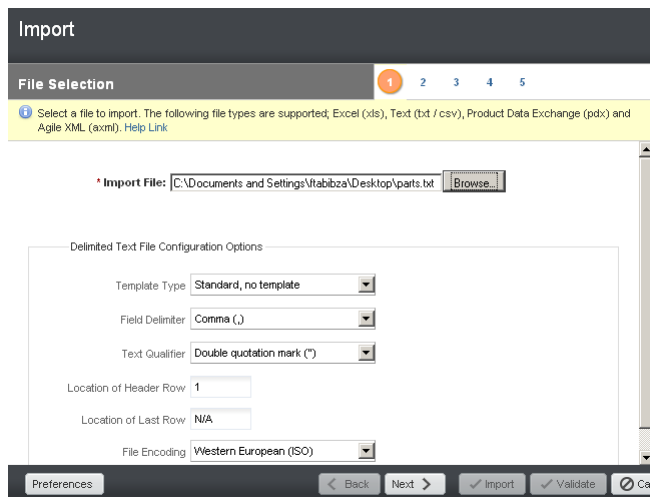
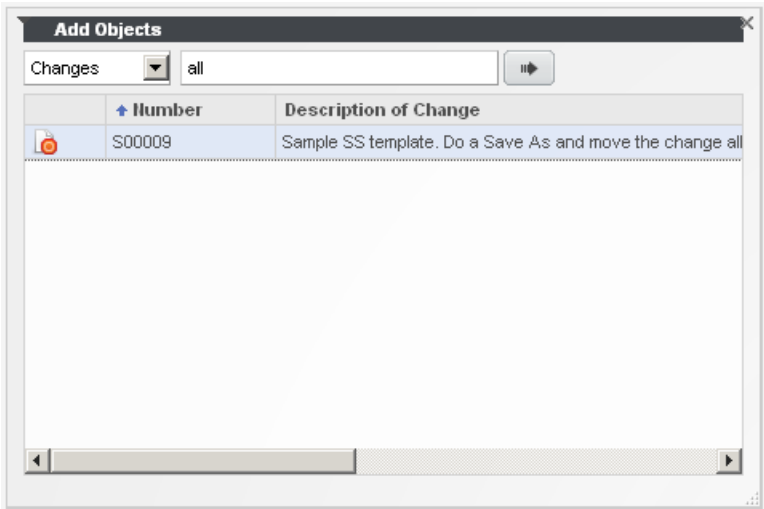


Figure 8: Release 9.3 Add Object dialog



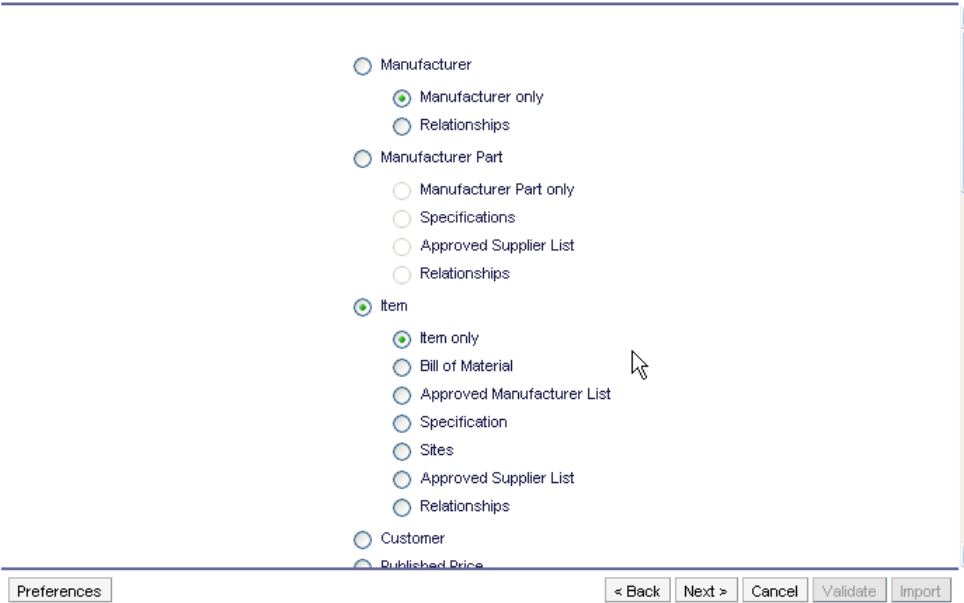
Content Specification Options - Step 2

In Release 9.2x, regardless of the selected file type (Text, aXML, PDX), all options were listed in a single column and you could not collapse or expand the listed options. Although there are no changes in functionality and actions of navigation and other buttons, they look slightly different. The change between the two releases is in the organization and appearance of the options.

Figure 9: 9.2x Content specifications interface

Import Wizard

Select Contents to Import



In Release 9.3, options are reorganized to facilitate content specification and selection. The selected file type impacts the list of options. This step provides two listings based on the selected file type. One lists options for Delimited text files and one for aXML and PDX files. You can expand and collapse available options for a given class. When expanded, they are listed in multiple columns to expedite selection.

Figure 10: 9.3 Content specification dialog for Delimited Text files

The screenshot shows the 'Import' dialog with the 'Specify File Content' step selected (indicated by a red circle around the number 2 in the step bar). The dialog has a dark header with the word 'Import'. Below the header is a light blue bar with the title 'Specify File Content' and a step bar with numbers 1 through 5. A yellow bar below the title contains an information icon and the text 'Specify the content to import from the options below. [Help Link](#)'. The main area is white and contains a tree view on the left with 'Manufacturer', 'Manufacturer Part', and 'Item' (expanded). To the right of the tree view are two columns of radio button options: 'Item only' (selected), 'Approved Manufacturer List', 'Sites', 'Relationships', 'Bill of Material', 'Specification', and 'Approved Supplier List'. Below the tree view are 'Customer', 'Published Price', and 'Quote History'. At the bottom is a dark bar with buttons: 'Preferences', '< Back', 'Next >', '✓ Import', '✓ Validate', and 'Cancel' (with a mouse cursor over it).

Equation 1: 9.3 Content specification dialog for aXML and PDX files

The screenshot shows the 'Import' dialog with the 'Specify File Content' step selected (indicated by a red circle around the number 2 in the step bar). The dialog has a dark header with the word 'Import'. Below the header is a light blue bar with the title 'Specify File Content' and a step bar with numbers 1 through 5. A yellow bar below the title contains an information icon and the text 'Specify the content to import from the options below. [Help Link](#)'. The main area is white and contains a tree view on the left with 'Project Item' (expanded). To the right of the tree view are two columns of checkbox options: 'Select All', 'Project Item only', 'Project Approved Manufacturer L', 'Project Bill of Material', and 'Project Item Attachment'. At the bottom is a dark bar with buttons: 'Preferences', '< Back', 'Next >', '✓ Import', '✓ Validate', and 'Cancel'.

Content Selection Options - Step 3

In Release 9.2x, the Wizard provided two interfaces to define/select attribute mapping and perform/skip data transformation. Task names are slightly different, but functionality remains the same in the two releases.

Figure 11: Release 9.2x Define attribute mapping interface

The screenshot shows the 'Import Wizard' dialog box, specifically the 'Select Mapping' step. The dialog has a title bar 'Import Wizard' and a subtitle 'Select Mapping'. Below the subtitle, there is a 'Change Order:' section with a text input field, an ellipsis button '...', and a 'Clear' button. Below this, there are four radio button options: 'Use an existing mapping file', 'Create a new mapping', 'Use default mapping definition' (which is selected), and 'Use currently defined mapping definition'. Below these options is an 'Edit Chosen Mapping' button. At the bottom of the dialog, there is a 'Preferences' button on the left and a row of navigation buttons on the right: '< Back', 'Next >', 'Cancel', 'Validate', and 'Import'.

Figure 12: Release 9.2x Transformation selection interface

The screenshot shows a software window titled "Import Wizard". Inside, the section "Select Transformation Definition File" is highlighted with a blue header. Below this, there are two radio button options: "Do not perform any transformations" (which is unselected) and "Apply transformations" (which is selected). Under the "Apply transformations" option, there is a label "Transformation Definition File:" followed by a text input field and a "Browse..." button. Below the input field is a link that says "Download Transformation Template". At the bottom of the window, there is a horizontal bar containing several buttons: "Preferences", "< Back", "Next >", "Cancel", "Validate", and "Import".

In Release 9.3, data mapping and data transformation tasks use a single interface. The process is streamlined and is more convenient.

Figure 13: Release 9.3 Data mapping and data transformation dialog

Import

Select Content Options 1 2 **3** 4 5

i Select a mapping and data transformation method. If you are importing Item or Price content specify whether or not a Change Order is required for modifications. [Help Link](#)

▼ Data Mapping

☒ Define attribute mapping in next step

☐ Use a saved mapping file

▼ Data Transformation

☒ No transformations are necessary

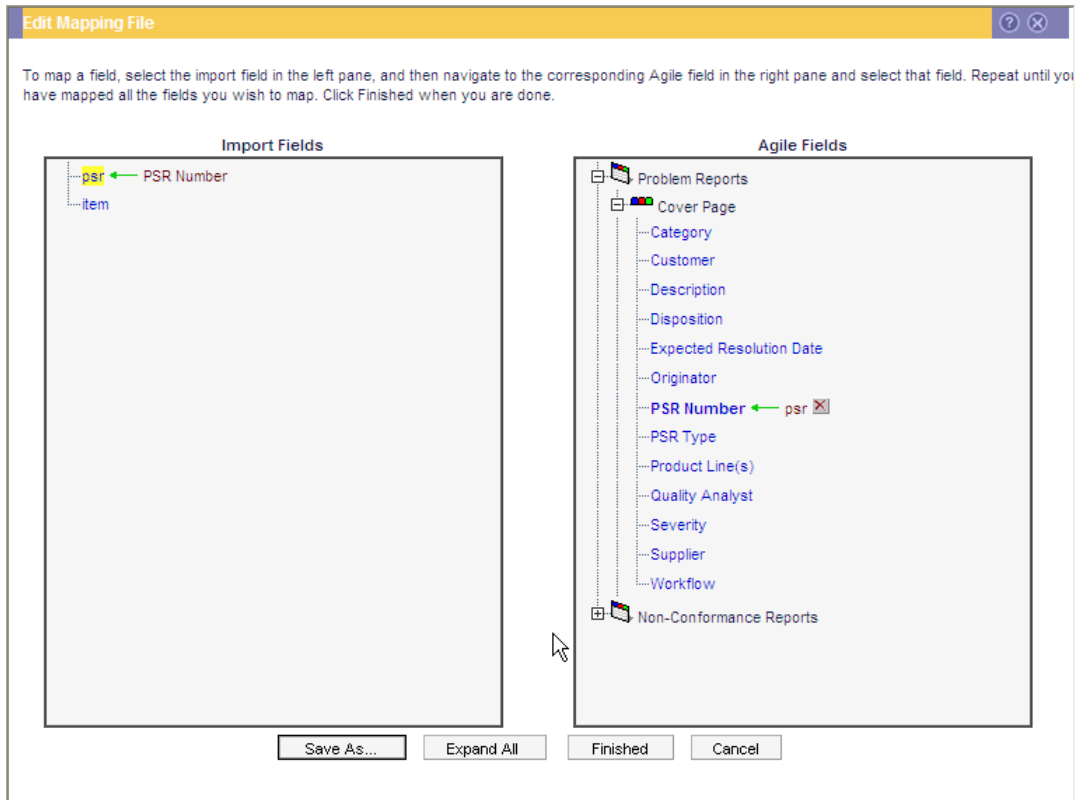
☐ Use a saved transformation file

[Download transformation template](#)

Attribute Mapping Selection - Step 4

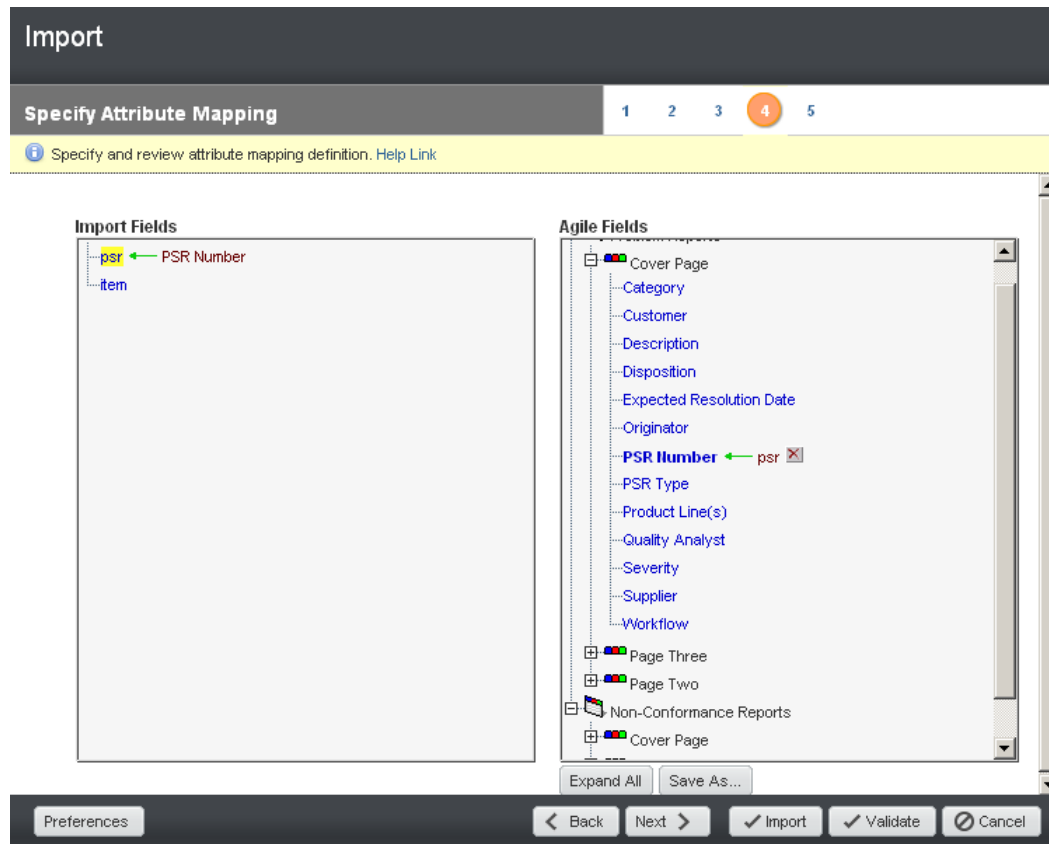
In Release 9.2x, to get to this dialog, it was necessary to click **Edit Chosen Mapping** in [Content Selection Option - Step 3](#) and click the **Finished** button to advance to the next step.

Figure 14: Release 9.2x Attribute mapping interface



In Release 9.3, this dialog appears immediately after clicking the **Next** button in [Content Selection Option - Step 3](#). The equivalent of the Finished button in Release 9.3 is Next and navigation buttons appear in the dialog which is not the case in Release 9.2x.

Figure 15: Release 9.3 Attribute mapping interface (dialog)



Import Review Definitions Interface - Step 5

In Release 9.2x, the organization of options was linear, similar to [Content Specification Options - Step 2](#) on page 13. Tasks, buttons, and functionalities remain the same.

Figure 16: Release 9.2x Settings review interface

Import Wizard

Review Settings and Begin Import

Import Source:	Local File
Import Source Format:	Delimited Text File (Standard)
Import Source File:	psr.txt
Import Contents:	PSR
Mapping File:	User edited map
Transformation Definition File:	No transformation file selected

Preferences

Parsing and Validation Options

Log transformations:	true
Multilist delimiter character:	;
Cascade delimiter character:	
Whitespace validation action:	Reject
Case validation action:	Convert
Length validation action:	Reject

Preferences < Back Next > Cancel Validate Import

In Release 9.3, options are reorganized to facilitate content specification. You can expand or collapse available options for easier access.

Figure 17: Release 9.3 Settings review interface

Import

Review Import Definition 1 2 3 4 5

Review the summary of your import definition. You can validate your definition to understand what import issues may exist.
[Help Link](#)

▼ File Information
 Import Source: Local File
 Import Source Format: Delimited Text File (Standard)
 Import Source File: psr.txt
 Import Contents: PSR
 Mapping File: User edited map
 Transformation Definition File: No transformation file selected

► Parsing and Validation
 ► Business Rule
 ► Default Types
 ► Autonumber Sources

Preferences < Back Next > ✓ Import ✓ Validate ⌂ Cancel

Import Validation Log

There were no functionality changes in Release 9.2x and Release 9.3. In Release 9.2x, the Message summary was included in the summary report and some button names were different. See [Icons and Buttons in Import Module](#) on page 6.

In Release 9.3, the organization of the report is greatly improved. The Message summary is removed and you can expand and collapse the reports to select what you want to view.

Import Log

There are no tasks or functionalities associated with the import log report. Basic information is the same in both releases. Button names have changed. See [Icons and Buttons in Import Module](#) on page 6.

In Release 9.3, you can expand or collapse the output results and messages. For changes in buttons, see [Icons and Buttons in Import Module](#) on page 6.

Functionality Changes in Import Module

New functionalities in the Import module (Wizard) include new options in setting Preferences and in the behavior of the "description" of an "item" during import. The new features and changes are described in the following paragraphs.

New Functionality in Import Module

The following features were introduced in 9.3:

- **Selective Removal of BOM/AML rows** — A new option called *Selective Remove* was added in Import wizard's *Multi Row Update Behavior* preference. When you select this option, Import can selectively remove BOM or AML rows. In *Agile PLM Import/Export Guide*, see Multi Row Update Mode.
- **Item description behavior during import** — Release 9.3 supports an additional behavior for the description of imported items in Redline or Authoring modes when a released version *is* or *is not* associated with the item. In *Agile PLM Import/Export Guide*, see Behavior of the Description of Items During Import.

Changed Functionality in Import Module

Not applicable

User Interface Changes in Export Module

User interface changes in the Export module are:

- Accessing the Export Wizard
- The Export Wizard dialog, buttons, and Preferences settings
- Interfaces in file selection, preparation, and export steps
- Enhanced functionality to search and select export data

Accessing the Export Wizard

For differences between Release 9.2x and 9.3, see [Accessing the Import Wizard](#) on page 7.

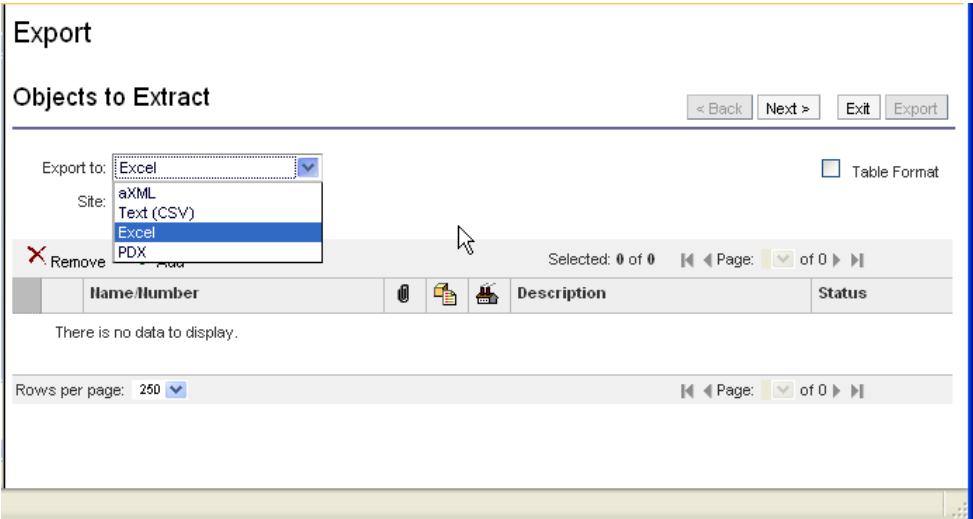
The Export Wizard

In Release 9.3, the Export Wizard opens in its own dialog and the *System Default Filter* appears to provide more visibility to what the export defaults are.

Changes in Export Wizard's Opening Interface

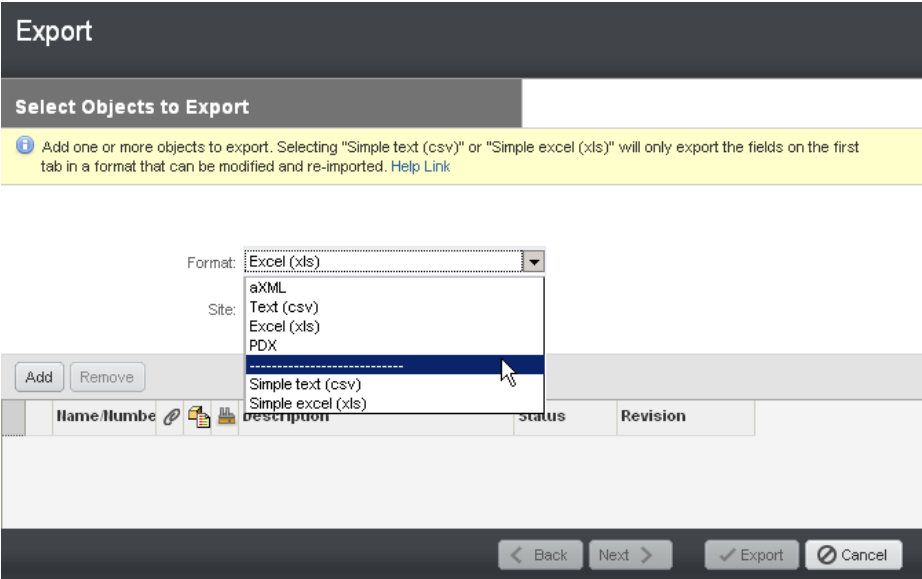
In Release 9.2x, the Export Wizard opened in the right pane and navigation buttons appeared in the top right hand portion of the pane. There was a **Table Format** check box to specify export format for cover page (and P2 and P3) data extracted on a single line in Excel or CSV formats, with a single header and a single data row. To cancel or exit the Wizard, you selected the **Exit** button.

Figure 18: 9.2x Export Wizard's opening interface



In Release 9.3, the Export Wizard opens in its own dialog. Navigation buttons appear in the bottom segment of the dialog. The **Table Format** check box is replaced with **Simple text (csv)** and **Simple excel (xls)**. While functionality of navigation buttons remains the same, **Exit** button is replaced with the **Cancel** button. See [Icons and Buttons in Export Module](#) on page 6.

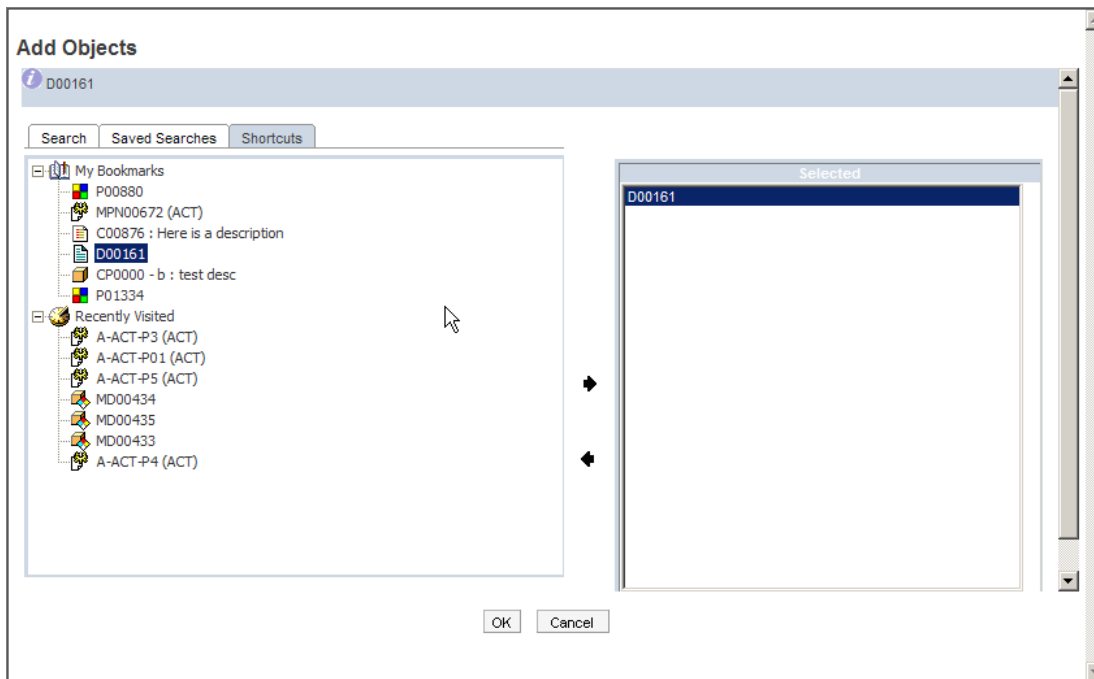
Figure 19: 9.3 Export Wizard's opening interface



Adding Objects - Step 1

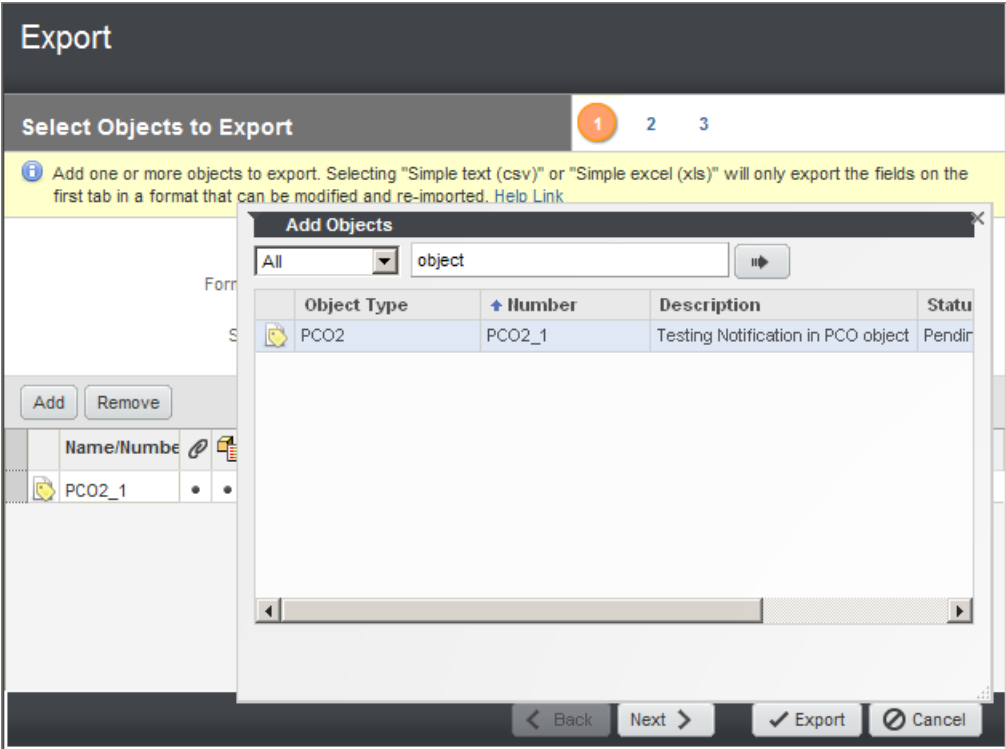
In Release 9.2x, three options were provided to search and select content to export. Navigation buttons in this interface were **OK** and **Cancel**. Once the objects were found, you moved them to **Selected** column for export. These are changed in Release 9.3.

Figure 20: Release 9.2x Selecting export objects interface



In Release 9.3, the selected object is listed in Add Objects dialog and you simply double click on the object of interest. In addition, you can execute a search in the Web Client to make the selection, launch the Export Wizard, proceed to next step, and complete the process. For more information, see [Functionality Changes in Export Module](#) on page 21.

Figure 21: Release 9.3 Selecting export objects interface



Export Filter Selection - Step 2

Although the **System Default Filter** was supported in Release 9.2x, it was not displayed in the filter selection step to inform you of available options for the selected object.

Figure 22: Release 9.2x Export filter selection interface



In Release 9.3x, the **System Default Filter** is displayed in the filter selection step and displays options for the selected object. The **Exit** button is replaced with the **Cancel** button.

Figure 23: Release 9.3 Export filter selection interface

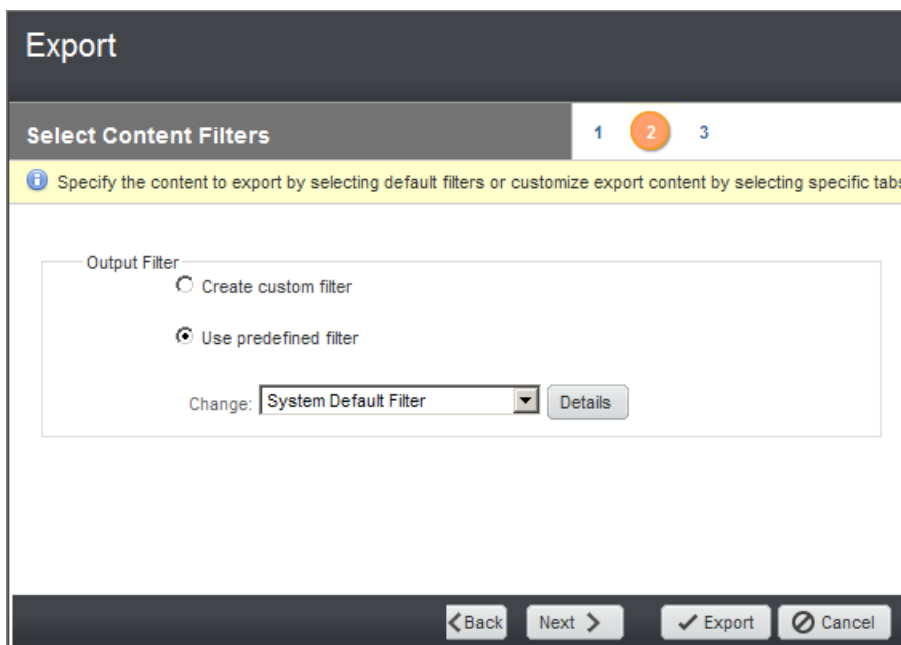
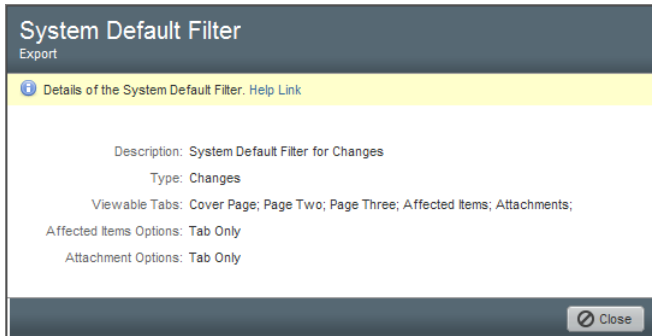


Figure 24: Release 9.3 System Default Filter

Export Properties Specification - Step 3

There are no functionality differences between Release 9.2x and Release 9.3. The differences are in appearance and interface names. In Release 9.3, The **Define Header** title that appeared in Release 9.2x is replaced with **Specify Export Properties** and the Export Wizard step (**Step 3**) is displayed in the dialog.

Functionality Changes in Export Module

In Release 9.3, you can execute a search (quick search, basic or parametric search, saved search, and so on), select the rows in the search results table, and click on the new option called **Export Objects** in Web Client's **More** menu. The Agile PLM will then launch the Export Wizard with all the selected objects added by default and you can proceed to next step on the export wizard and complete the process.

- On the search results table, if you did not make any selections, but clicked on this option, Agile PLM, it will add all rows from search results to the Export Wizard.
- You can select a particular class to search and find the export objects more quickly.
- You can select a table's rows, copy them, launch Export Wizard, paste the copied rows, and continue with the export process.

Note There is no paste action supported by Agile PLM, but you can do it using keyboard shortcut Ctrl+V).

- When you select aXML or PDX formats and choose **Create Custom Filter** option in step 2, the Export Wizard will apply the iterative mode in step 3. In this mode, step 3 is repeated for applicable object types that are added for export.

Other related information includes:

Change Controlled Attribute — A user with administrator privileges can set this option in the Java Client to specify whether a given *item attribute* is *change controlled* or not. Once set, a user in the Web Client can track *Item Attribute Values by Change* (ECO or MCO). This option has no procedural or UI impacts on this Guide. It only adds additional exported values when changes are exported to aXML with their Redline information.

Agile aXML schema definition — This release documents the key components of the Agile aXML schema for exporting data. This information appears in Agile PLM Import/Export Guide in an appendix called The Agile aXML Schema for Exporting Data.

New Functionality in Export Module

Not applicable