



# **Agile Product Lifecycle Management**

## **Customer Needs Management Guide**

v1.1

Part No. E18701-03

July 2011

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# Preface

Oracle's Agile PLM documentation set includes Adobe® Acrobat PDF files. The [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technetwork/documentation/agile-085940.html) <http://www.oracle.com/technetwork/documentation/agile-085940.html> contains the latest versions of the Agile PLM PDF files. You can view or download these manuals from the Web site, or you can ask your Agile administrator if there is an Agile PLM Documentation folder available on your network from which you can access the Agile PLM documentation (PDF) files.

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**Note** To read the PDF files, you must use the free Adobe Acrobat Reader version 9.0 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/technetwork/documentation/agile-085940.html) <http://www.oracle.com/technetwork/documentation/agile-085940.html> can be accessed through **Help > Manuals** in both Agile Web Client and Agile Java Client. If you need additional assistance or information, please contact My Oracle Support (<https://support.oracle.com>) for assistance.

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

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## TTY Access to Oracle Support Services

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## Readme

Any last-minute information about Agile PLM can be found in the Readme file on the [Oracle Technology Network \(OTN\) Web site](http://www.oracle.com/technetwork/documentation/agile-085940.html) <http://www.oracle.com/technetwork/documentation/agile-085940.html>.

## Agile Training Aids

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.

## 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.

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# Getting Started in CNM

**This chapter includes the following:**

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- Welcome to Customer Needs Management..... 1
- Log in to CNM..... 1

## Welcome to Customer Needs Management

Welcome to Agile Customer Needs Management Guide. Customer Needs Management (CNM) is a product that helps you transform market requirements into products. Those requirements can come in from a number of sources such as CRM, Quality or other enterprise applications or detailed documents received from customers, and so on. CNM offers a platform on which Product and Project owners can capture, filter, refine, collaborate on, prioritize and eventually incorporate those requirements into products.

## How to Find Documentation for CNM

The Oracle Agile documentation set is found at this Web site:  
<http://www.oracle.com/technetwork/documentation/agile-085940.html>.

## Installation Test Notice

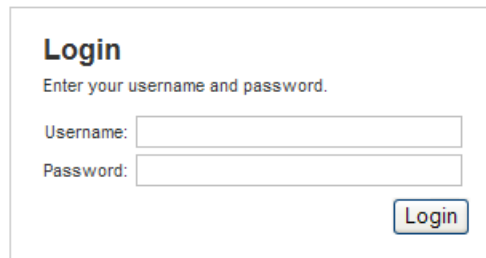
Install and test this release on a designated development server before installing it on your production environment. Your development environment should mirror your production environment as closely as possible to provide accurate testing results. It is important to validate the installation of this release, and confirm your integrations are working correctly as part of your minimum due diligence. Any problems or questions noted during your development system testing should be resolved before installing this release on your production environment.

## Log in to CNM

Prior to logging in to CNM your user account needs to be created and enabled in Oracle's Agile product lifecycle management application or in LDAP. For more information, see the CNM *Implementation Guide*.

First, be sure to disable the popup blocker for CNM-related URLs in the browser you are using. Enter the determined URL for the CNM application. The **Login** page appears as below:

**ORACLE** Agile Customer Needs Management

A screenshot of the Oracle Agile Customer Needs Management login page. The page has a light gray background. At the top, the text "ORACLE" is in red, followed by "Agile Customer Needs Management" in blue. Below this, there is a white rectangular box with a thin gray border. Inside the box, the word "Login" is in bold black text. Below "Login" is the instruction "Enter your username and password." in a smaller black font. There are two input fields: "Username:" followed by a text box, and "Password:" followed by a text box. To the right of the password field is a blue button with the word "Login" in white text.

Enter your username and password and then click **Login**. You are brought to the **Home** page of the CNM application.

# Exploring the Home Page

This chapter includes the following:

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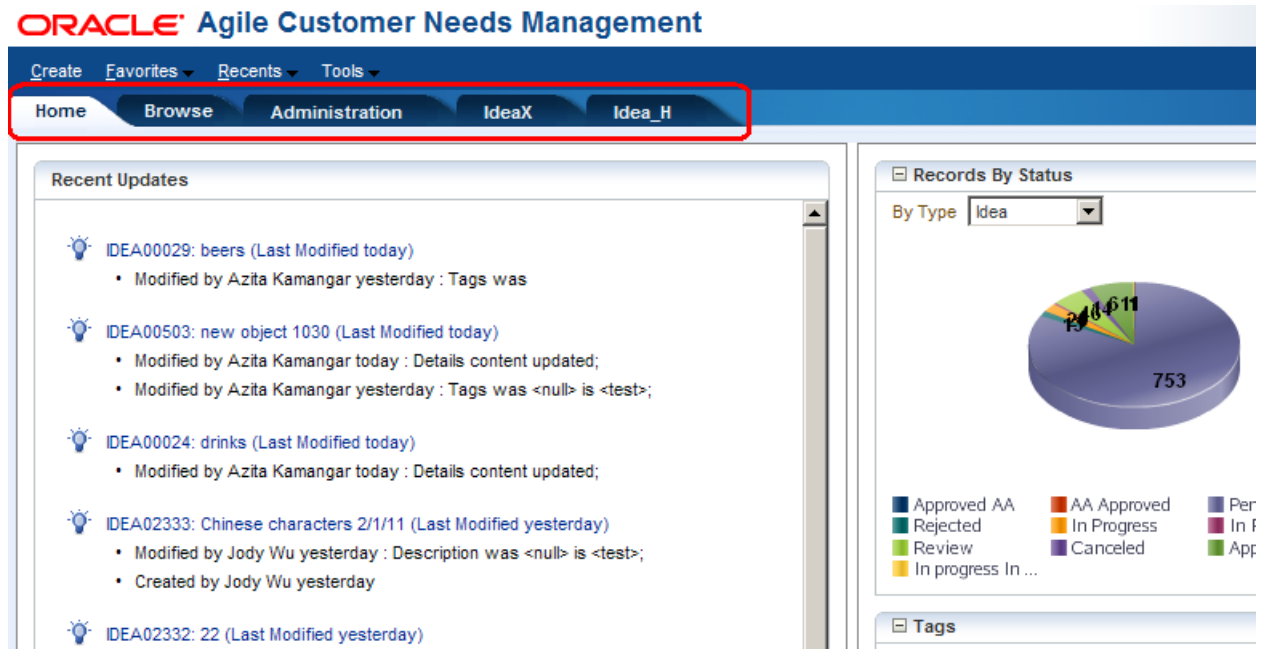
## Overview

Once you successfully log in to CNM you are brought to the **Home** page, where you can:

- View the outstanding reviews requested from you in the **My Pending Reviews** area
- Read the latest information about objects in the **Recent Updates** area
- Review a graphical representation of the current status of objects from the **Records By Status** dashboard area
- View the tags, or categories, given to objects to locate a grouping of specific objects from the **Tag Cloud**
- Create objects using the **Create** button
- Access bookmarked objects using the **Favorites** menu
- Go to recently visited objects using the **Recents** menu
- Access the **Tools** menu
- Search for an individual object in CNM using **Search** or **Browse**
- Access to system configuration using the **Administration** link
- Change your display using the **User Preferences** link
- Access clarification about CNM behavior from the **Help** link
- End your current user session from the **Logout** link

When you log into CNM you are immediately brought to the **Home** page where there is a tab for **Home** and **Browse**. Both of these tabs cannot be closed. They are static tabs that are always available to access at any time.

The **Browse** tab gives you access to a search page where you can perform a Quick search or an Advanced search. Executing any search opens up search results in the **Browse** tab. If the **Browse** tab already contains executed search results, the **Browse** tab is reused and the older search results are replaced by the newer ones.



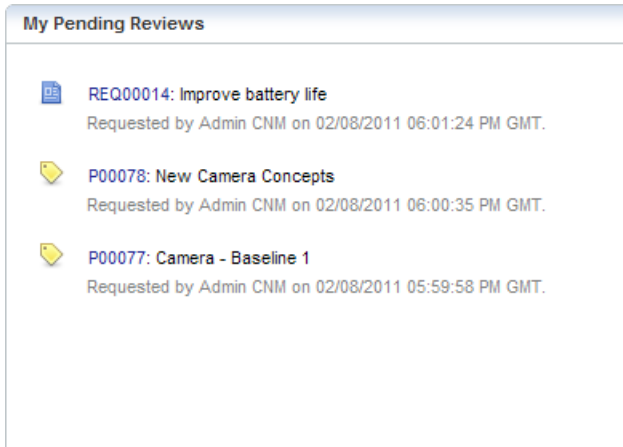
Multiple tabs display as objects are opened, or if the Administration area is accessed. As users open an object in CNM, that object becomes the latest tab found at the end of the row of tabs. The maximum number of tabs is ten. Once a user reaches that limit they are notified that a tab needs to be closed in order to proceed with opening another tab. If a user selects an object that is already an active and open tab, the page focus for the user is changed to the already available tab.

**Note** The **Home** page elements of **Recent Updates**, **Tags**, etc. will not refresh with recent changes for the user until the user logs out and then back in to CNM.

The following sections illustrate how to navigate through each component accessible from the **Home** page.

## My Pending Reviews

When you are assigned as a reviewer for any number of objects, they display as a list in reverse chronological order in the **My Pending Reviews** section.



The object IDs are active links that direct you back to the object so you can carry out your review for that specific object. If the user has no current assignments then this section does not display for the user.

For more information about review assignments, see [Object Signoffs](#) on page 38.

## Recent Updates

The **Recent Updates** area displays a list of summaries about what has happened to certain objects since you logged out of the system. If you last logged out of CNM more than thirty days prior to your current login session you see only updates from as far back as thirty days. A maximum of five updates are displayed for each object. CNM finds a minimum of ten object updates to display and a maximum of twenty.

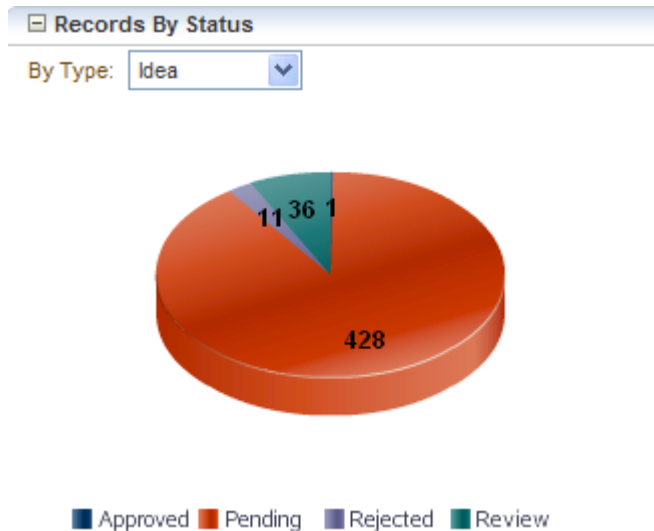
The **Recent Updates** area is seen below:

Recent Updates	
	<a href="#">QUOTE00116: Sports Arena (Last modified today)</a> <ul style="list-style-type: none"><li>• Component removed by Mariah Thomas today: Remove Component: Food</li><li>• Component added by Mariah Thomas today: Add Component: Food</li><li>• Component added by Mariah Thomas today: Add Component: Retail</li><li>• Component added by Mariah Thomas today: Add Component: Sports</li><li>• Modified by Mariah Thomas today: Tags was &lt;&gt; is &lt;ideamt&gt;</li></ul>
	<a href="#">IDEA00347: Soccer (Last modified today)</a> <ul style="list-style-type: none"><li>• Created by Mariah Thomas today</li></ul>
	<a href="#">IDEA00335: Baseball (Last modified today)</a> <ul style="list-style-type: none"><li>• Modified by Mariah Thomas today: Tags was &lt;&gt; is &lt;ideaMT&gt;</li><li>• Created by Mariah Thomas today</li></ul>
	<a href="#">IDEA00334: Basketball (Last modified today)</a> <ul style="list-style-type: none"><li>• Modified by Mariah Thomas today: Tags was &lt;&gt; is &lt;ideaMT&gt;</li><li>• Created by Mariah Thomas today</li></ul>
	<a href="#">IDEA00336: Football (Last modified today)</a> <ul style="list-style-type: none"><li>• Modified by Mariah Thomas today: Tags was &lt;&gt; is &lt;ideamt&gt;</li><li>• Created by Mariah Thomas today</li></ul>
	<a href="#">IDEA00337: Volleyball (Last modified today)</a> <ul style="list-style-type: none"><li>• Modified by Mariah Thomas today: Tags was &lt;&gt; is &lt;ideamt&gt;</li><li>• Created by Mariah Thomas today</li></ul>
	<a href="#">REQ01313: Sports (Last modified today)</a> <ul style="list-style-type: none"><li>• Modified by Mariah Thomas today: Tags was &lt;&gt; is &lt;reqmt&gt;</li><li>• Component added by Mariah Thomas today: Add Component: Soccer</li><li>• Component added by Mariah Thomas today: Add Component: Hockey</li><li>• Component added by Mariah Thomas today: Add Component: Basketball</li><li>• Component added by Mariah Thomas today: Add Component: Football</li></ul>

Object information is displayed when you are the creator of an object and still a team member, or if you are simply a team member of the object. The summary records follow a reverse chronological formatting with the last update of the objects at the top. Each heading with the object name displayed in the **Recent Updates** area is an active link that takes you directly to that object.

## Records By Status

The **Records By Status** area has a graphical display, or dashboard, of CNM objects filtered by type, and sorted by their current status, as seen in the figure below:




This dashboard gives you an at-a-glance report of how objects are progressing in CNM. You can then click any region of the dashboard graphic and automatically run a search for all the objects of the selected type that are currently in that state. These search results display in the **Browse** tab. Once the search results display the corresponding objects that match the status search criteria, you can select an object in the results and go directly to its **Summary** section.


The search executed by clicking the dashboard has the same limitations as any other search in CNM. If you do not have access to all the objects that fall within the category you selected, then you are only shown the objects that match your search criteria that you also have access to in the **Search Results** table. For more information about searches, see [Searching in CNM](#) on page 10.

## Tag Cloud

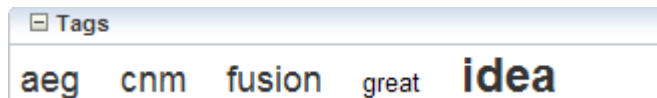
Tags are a utility that provide a way to categorize and group objects. All users with a Participant role or higher can add or remove tags. Multiple tags can be associated with one object as long as the individual tags are separated by a comma. All tags are shown in alphabetical order, are displayed in lowercase and if entered in uppercase will by default display in lowercase. When tags are associated with objects, CNM tracks these tags and makes them available as autogenerated suggestions for users to include as a tag in order to eliminate repeated tags.

**To add a tag to an object:**

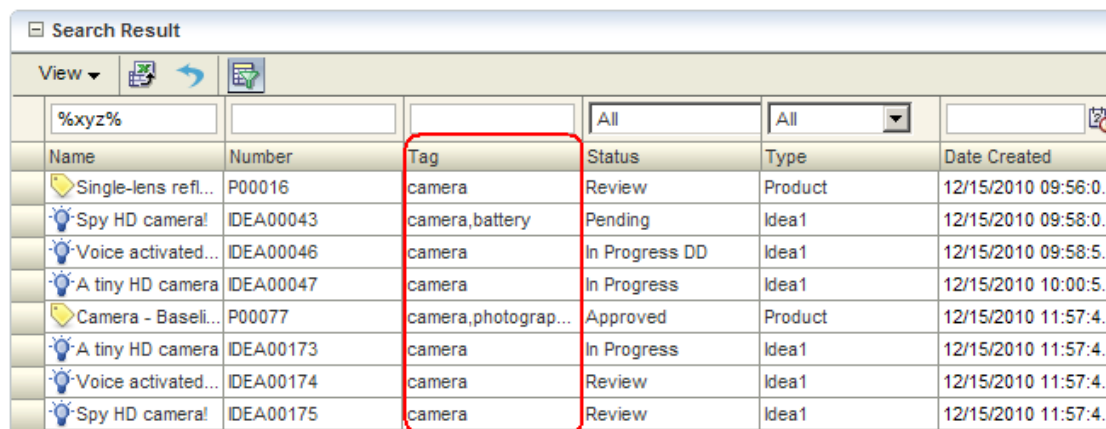
1. From the **Summary** section of the object click .
2. The object is now in Edit mode. Enter text in the **Tags** field or select from the autogenerated tags, separating each tag with a comma.

- Click  to finish.

The **Tag Cloud** shows you all the tags that are associated with objects in CNM. There is a ranking system for tags that determines the presentation of the tag text in the **Tag Cloud**. As objects are tagged, CNM tallies which tags are being used most often. The tags that comprise the top ten percent of use display in a larger font and with a bold style. The tags that are in the next thirty percent of object use display in a larger font, but are not in a bold style. The remaining tags display in regular size and font. This behavior is seen in the example below.



In the **Tag Cloud** all the tags display as active links. When you click a tag link, CNM runs a search and retrieves all the objects that have that tag associated with them. The results display in a **Search Results** table in the **Browse** tab as seen in the example below:



Name	Number	Tag	Status	Type	Date Created
Single-lens refl...	P00016	camera	Review	Product	12/15/2010 09:56:0...
Spy HD camera!	IDEA00043	camera,battery	Pending	Idea1	12/15/2010 09:58:0...
Voice activated...	IDEA00046	camera	In Progress DD	Idea1	12/15/2010 09:58:5...
A tiny HD camera	IDEA00047	camera	In Progress	Idea1	12/15/2010 10:00:5...
Camera - Baseli...	P00077	camera,photograp...	Approved	Product	12/15/2010 11:57:4...
A tiny HD camera	IDEA00173	camera	In Progress	Idea1	12/15/2010 11:57:4...
Voice activated...	IDEA00174	camera	Review	Idea1	12/15/2010 11:57:4...
Spy HD camera!	IDEA00175	camera	Review	Idea1	12/15/2010 11:57:4...

The search executed by clicking the tag has the same limitations as any other search in CNM. If you do not have access to all the objects that fall within the tag category you selected, then you are only shown the objects that match your tag search that you also have access to in the **Search Results** table. For more information about searches, see [Searching in CNM](#) on page 10. If you click a tag link and no rows are displayed in the **Search Results** table, then you do not have the privileges required to access any objects associated with that tag because you are not a team member of any objects that have that tag.

## Create

A user with a Participant role level or higher can create a new object by clicking the **Create** button. To learn more about creating an object, see [Creating an Object](#) on page 17.

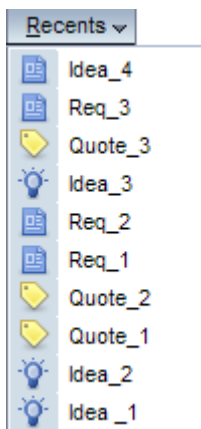
## Favorites

The **Favorites** option provides a way to organize your selection of favorites through the **Manage Favorites...** option. There is also a list of any object type you added as a **Favorite** link. To learn more about working with **Favorites**, see [Using Favorites](#) on page 18.

## Recents

The **Recents** dropdown menu contains a list of the last ten objects that you have most recently opened shown with the icon and several characters of the object's name. If you hover over any of the objects in the list, a tooltip displays the object number. As you create new objects, they are also added to the **Recents** list of objects.

When you select an object in the list, you are taken directly to that object's **Summary** section. If any object is opened, it is then added to the top of the list of **Recents**, the other entries are moved down, and the eleventh entry is removed from the list.



If you open an object that is already present in the **Recents** list, the newly opened object is moved to the top and the list rearranges according to chronology. Objects that are not explicitly opened by you, such as an object added to another object's structure, are not added to the **Recents** list. The content of the **Recents** dropdown list is specific to your activities and is carried across user sessions.

## Tools

The **Tools** menu has the following two options:

- **Import**
- **View Deleted Objects List**

## Import

CNM's Import feature supports the following operations:


- Import to update existing objects in the system (CNM server) in the Microsoft Excel format
- Create objects by using the Import process to import directly from Microsoft Excel worksheets
- Used in conjunction with export to mass update multiple objects in a hierarchy structure

For more information about the Import operation, please see [Exporting and Importing Objects](#) on page 47.

## View Deleted Objects List

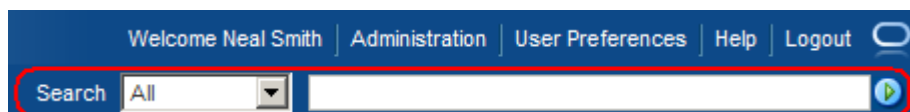
The **Deleted Objects List** is maintained by the CNM application and cannot be altered or removed by any user. The list displays all the objects that were deleted by CNM users in a table format and can be sorted by any of the column headers.

**To view the Deleted Objects List:**

1. Click the **Tools** link.
2. Select the **View Deleted Objects List** from the dropdown list menu.
3. The **Deleted Objects List** window appears with **Type**, **Number**, **Name**, **Date Deleted**, and **Deleted By** columns.
4. Click  to finish.

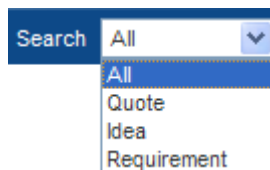
## Searching in CNM


The Search utility is found in the top right of the application as well as the **Browse** tab.



### Quick Search

The Quick Search has the option of filtering your search parameters by choosing to search through all objects or only a specific object type.



Once this is selected you can search for objects in CNM by typing text into the search field and clicking **Execute Quick Search** , or clicking Enter on your keyboard. Searching for objects initiates a

search of text, multitext, flex, and list fields in objects, which includes **Name, Number, Description, Tags, Rich Text**, Notes, Comments, Attachment Names, and Attachment Descriptions. There is a system setting to include searching attachment content that the Administrator needs to set to **Yes**. For more information, see [Establishing System Settings](#) on page 72.

**Note** You are able to run searches using wildcards by denoting an (\*) or a (%) after your text string. CNM internally adds a wildcard character before and after all search text strings executed from Quick Search.

## Advanced Search

You can access an Advanced Search within the **Browse** tab. The Advanced Search section has several criteria you can adjust to filter your search results and find the object or objects you are looking for. After expanding the **Advanced Search** section you are presented with the following:

**Advanced Search**

Match ☒ All ☐ Any

Type

Tag

Name/Number/Desc

Rich Text

Name

Date Created

Description

Date Modified

Number

Created By

Select the criteria for each field, whether you want your search operator to be Equal to, Does not Contain, and so on. Then type in the search string you desire. For the **DateCreated** and **DateModified** fields, select your search operator to be On or After, Before, and so on, but not Equal To. Then click

**Select Date** and choose the date you require for an accurate search result. Click  to execute your advanced search.

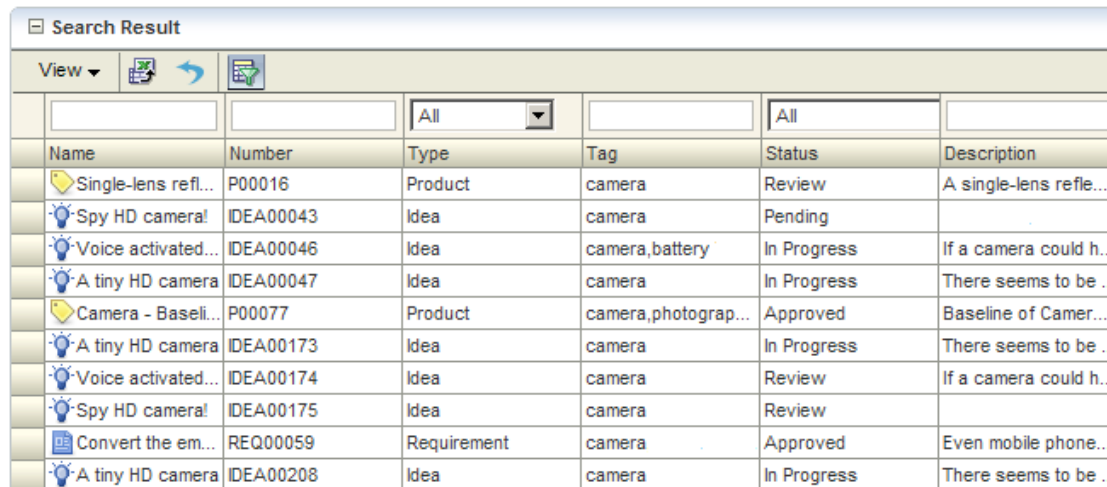
**Note** For the **Date Created/Date Modified** criteria, the time stamp used is 0:0:0.

If the criteria you entered is not what you want, or the results you see are not what you need, click

to clear all the fields and begin again.

## Search Results

The results of both search types are displayed in a table format, as seen below:



The screenshot shows a window titled "Search Result" with a toolbar containing a "View" dropdown, a print icon, a refresh icon, and a search icon. Below the toolbar is a table with the following data:

Name	Number	Type	Tag	Status	Description
Single-lens refl...	P00016	Product	camera	Review	A single-lens refle...
Spy HD camera!	IDEA00043	Idea	camera	Pending	
Voice activated...	IDEA00046	Idea	camera,battery	In Progress	If a camera could h...
A tiny HD camera	IDEA00047	Idea	camera	In Progress	There seems to be ...
Camera - Baseli...	P00077	Product	camera,photograp...	Approved	Baseline of Camer...
A tiny HD camera	IDEA00173	Idea	camera	In Progress	There seems to be ...
Voice activated...	IDEA00174	Idea	camera	Review	If a camera could h...
Spy HD camera!	IDEA00175	Idea	camera	Review	
Convert the em...	REQ00059	Requirement	camera	Approved	Even mobile phone...
A tiny HD camera	IDEA00208	Idea	camera	In Progress	There seems to be ...

The **Search Results** table allows you to view essential data about a set of objects, such as the status or who created the objects, and then select the result that best matches your query. The **Name** and **Number** columns have active links that take you directly from the **Search Results** table to the object you click. You can sort all the columns in a descending or ascending order and also rearrange the order of the columns displayed.


Search results for CNM objects are contingent upon the team assignments of objects. If you are part of the team of an object, either as an individual or as a member of a user group added as team members, the object displays in the search results. If you are not a team member, even if an object matches your search criteria, it does not display in the search results.

**Note** Search results are limited to 5000 entries.

## Query By Example

The column headers have text and list input fields where you can enter text strings to filter your search results down to a smaller set of results more pertinent to your needs. Clicking the **Query By Example** button activates and deactivates these text input fields above the column headers. After entering in the text you want, you need to click Enter on your keyboard.

## Exporting Search Results

You have the ability to export your entire search results, or selected results, when you click  in the **Search Results** window. For more information, see Export from Search Results.

## Resetting Search Filters

A user can clear the entered text strings from the column header filter boxes by clicking the **Reset**

**Filter** button. This lets the user enter a different search filter that is applied to the original, unfiltered results. Once the user clicks Enter the results refresh with the new results.

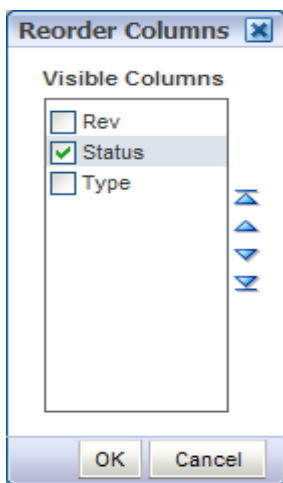
## Copy to Clipboard

From any search results in CNM a user can right-click a row or cell and access a **Copy** function. This copies the currently selected object (not cell) to an internal CNM clipboard. A user can now navigate to a structure of an object in the **Explorer** area and paste the copied object as an addition to the structure.

## View

Tables have a **View** utility to change the column layout. From the **Columns** option you can select **Show All** or you can select specific columns to display. Each column header name has a checkmark next to it if it is displaying. Click the column name from the **Columns** list options and it will de-select that column and the table will automatically reload without that column.

From **View** you can also select **Reorder Columns...** and the **Reorder Columns** window appears as seen below:




In this window the available columns are displayed with a checkbox next to each. Check the box of the column(s) you want to reorder and then choose to move the item(s) to the top of the list or to move the item(s) up one position in the list. When you are finished click **OK** and the table you have open will automatically shift column positions to what you selected.

**Note** The **Add Reference** window does not allow moving the first column **Number** out of its default order.

## Table Column Drag and Drop

To illustrate the drag and drop column behavior available in tables, see the example below.

Open an object that has child objects, such as *QuoteX*. Click  and the page is redirected to the **Structure Table View** where you can select a column to rearrange, such as **Object Number**.

	Type	Description	Tags	Object Number	Status	Date Created	Date Modified
Name	Type	Description	Tags	Object Number	Status	Date Created	Date Modified
	Type	Description	Tags	Object Number	Status	Date Created	Date Modified
	Type	Description	Tags	Object Number	Status	Date Created	Date Modified
QuoteX	Quote	This is needed.		QUOTE00096	Pending	2010-02-24 ...	2010-02-24 ...
Req1	Requirement	This is wonderful	fusion	REQ01296	Review	2010-02-24 ...	2010-02-24 ...
ReqB	Requirement	This is awesome	fusion	REQ01294	Approved	2010-02-24 ...	2010-02-24 ...
IdeaC	Idea		cnm	IDEA00299	Pending	2010-02-24 ...	2010-02-24 ...
IdeaQ	Idea		cnm	IDEA00300	Pending	2010-02-24 ...	2010-02-24 ...
ReqY	Requirement	This is perfect	fusion	REQ01292	Review	2010-02-24 ...	2010-02-24 ...

Drag the **Object Number** column away from its present order.

	Type	Description	Tags		Status	Date Created	Date Modified
Name	Type	Description	Tags		Status	Date Created	Date Modified
	Type	Description	Tags	Object Number	Status	Date Created	Date Modified
	Type	Description	Tags	Object Number	Status	Date Created	Date Modified
QuoteX	Quote	This is needed.		Object Number	Pending	2010-02-24 ...	2010-02-24 ...
Req1	Requirement	This is wonderful	fusion	Object Number	Review	2010-02-24 ...	2010-02-24 ...
ReqB	Requirement	This is awesome	fusion	Object Number	Approved	2010-02-24 ...	2010-02-24 ...
IdeaC	Idea		cnm	QUOTE00096	Pending	2010-02-24 ...	2010-02-24 ...
IdeaQ	Idea		cnm	REQ01296	Pending	2010-02-24 ...	2010-02-24 ...
ReqY	Requirement	This is perfect	fusion	REQ01294	Review	2010-02-24 ...	2010-02-24 ...
				IDEA00299			
				IDEA00300			
				REQ01292			

Find the column placement you want for **Object Number** and release the column into the blank column space.

Name	Type	Description	Tags	Status	Date Created		Date Modified
	Type	Description	Tags	Status	Date Created	Object Number	Date Modified
	Type	Description	Tags	Status	Date Created	Object Number	Date Modified
	Type	Description	Tags	Status	Date Created	Object Number	Date Modified
QuoteX	Quote	This is needed.		Pending	2010-02-24 ...		2010-02-24 ...
Req1	Requirement	This is wonderful	fusion	Review	2010-02-24 ...	QUOTE00096	2010-02-24 ...
ReqB	Requirement	This is awesome	fusion	Approved	2010-02-24 ...	REQ01296	2010-02-24 ...
IdeaC	Idea		cnm	Pending	2010-02-24 ...	REQ01294	2010-02-24 ...
IdeaQ	Idea		cnm	Pending	2010-02-24 ...	IDEA00299	2010-02-24 ...
ReqY	Requirement	This is perfect	fusion	Review	2010-02-24 ...	IDEA00300	2010-02-24 ...
						REQ01292	

The **Object Number** column is now moved to a new location and order in the **Structure Table View**.

Name	Type	Description	Tags	Status	Date Created	Object Number	Date Modified
	Type	Description	Tags	Status	Date Created	Object Number	Date Modified
	Type	Description	Tags	Status	Date Created	Object Number	Date Modified
	Type	Description	Tags	Status	Date Created	Object Number	Date Modified
QuoteX	Quote	This is needed.		Pending	2010-02-24 ...	QUOTE00096	2010-02-24 ...
Req1	Requirement	This is wonderful	fusion	Review	2010-02-24 ...	REQ01296	2010-02-24 ...
ReqB	Requirement	This is awesome	fusion	Approved	2010-02-24 ...	REQ01294	2010-02-24 ...
IdeaC	Idea		cnm	Pending	2010-02-24 ...	IDEA00299	2010-02-24 ...
IdeaQ	Idea		cnm	Pending	2010-02-24 ...	IDEA00300	2010-02-24 ...
ReqY	Requirement	This is perfect	fusion	Review	2010-02-24 ...	REQ01292	2010-02-24 ...

## User Preferences

A CNM user can access some personal user interface settings from **User Preferences**.

User Preferences

Any changes made to the User Preferences will not take effect until you log out of CNM and log back in for another user session.

The image shows a 'User Preferences' dialog box with the following settings:

- Number Format:** 987,654,321.09
- Language:** English
- Time Zone:** (GMT+00:00) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London
- Time Format:** hh:mm:ss aaa z (10:00:00 AM PST)
- Date Format:** MM/dd/yyyy

At the bottom of the dialog are three buttons: 'Help', 'Save', and 'Cancel'.

CNM is available for localization with the following languages: English, French, German, Japanese, Korean, Russian, Simplified Chinese and Traditional Chinese. These are the available values from the **Language** dropdown.

## Help

To access Oracle's Agile Product Lifecycle Management Customer Needs Management help materials, in the top right corner of CNM click **Help**. A new window launches that has the help materials available for you. There is also help available from many of the action windows in CNM.

When you click **Help**, a new window launches where you are directed to the configured online help materials, or to an Oracle's Agile Product Lifecycle management User Productivity Kit (UPK) menu. Your CNM administrator needs to have previously configured an **Online Help URL** setting in **System Settings** in order for this to be an active link. It is possible that the **Help** link directs you to a User Productivity Kit (UPK) menu where you can choose different online help topics that guide you through specific actions in CNM. For more information, see [Establishing System Settings](#) on page 72.

## Logout

To end your user session, click **Logout** in the top right corner of the CNM application. You will be immediately directed back to the Login page with the **Username** and **Password** fields blank.

**Important** A user session that is idle for 25 minutes will automatically end the user session and when you attempt to perform any action you are directed back to the Login page.

# Working with Objects

This chapter includes the following:

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
▪ Creating an Object.....	17
▪ Accessing Objects .....	17
▪ Leveraging the See Also.....	26
▪ Managing Object Team .....	27
▪ Working with Explorer.....	30
▪ Object Signoffs .....	38
▪ Performing More Object Actions.....	40

## Creating an Object

There are several places to create an object in CNM. The following sections cover the object creation process:

- Home Page
- [Import](#) on page 53
- Save As
- Explorer

To create a new object from the Home Page:

1. Click .
2. The **Create** window appears. The **Number** field is autogenerated with an autonumber.
3. Choose the type of the object from the **Type** dropdown menu.
4. Enter a name in the **Name** field (that does not exceed 128 characters).
5. You have the option to enter a description (that does not exceed 4000 characters) in the **Description** field.
6. When finished click **Create**. A tab opens up with the newly created object open in an edit mode where you can fill in more details.

---

**Note** The creator of an object is always added to the **Team** list. If the object type has a configured default value for team, that default value is also added to the **Team** list. For more information see, [Managing Object Teams](#) on page 27.

---

## Accessing Objects

There are several places that you can access an object in CNM.

**Recent Updates** — from the display of object activity, click the link to the object you want to view

**Favorites** — from the list of your added favorites, choose the specific object you want to view

**Recents** — from the list of the last ten objects that you have accessed, choose the object you want to view

**Tag Cloud** — from this area, click the tag you want to run a search for all objects that have that specific tag associated with them and then click the object you want to view

**Search** — from the search field, execute a search for an object with specific criteria and parameters and then click the object you want to view

**Explorer** — from the displayed structure of an object and its child objects, click the child object you want to view

**Where Used** — from the **Where Used** table, click the parent object link to view the object

## Favorites

If there are objects that you need to return to frequently, using **Favorites** helps you find them easily. The **Favorites** dropdown menu stores a list of the objects you added as favorites. Any object type can be added to your **Favorites** list and the object icon and name are visible in the dropdown menu of **Favorites**. The list of favorites is specific to the user.

Once you select an object from your list of favorites you are directed to the **Summary** section of that object. If you no longer have the necessary role to access this object, or if this object is deleted, you will receive an error message.

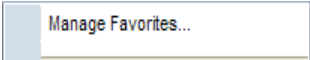

## Adding Favorites


The **Add to Favorites** option is available to you from the **More Actions** menu. Once you select **Add to Favorites** the object currently open is added to the list of objects under **Favorites**.

## Managing Favorites

The **Manage Favorites...** option is available from the **Favorites** dropdown menu to delete previously added objects as favorites.

**To delete an object from the user's Favorites list:**

1. From the **Favorites** dropdown menu click .
2. The **Manage Favorites** window appears.
3. Click the row of the object you want to delete.
4. Click  to delete the entry from the list.

5. Click  to finish.

## Summary

The **Summary** section of an object displays the following information:

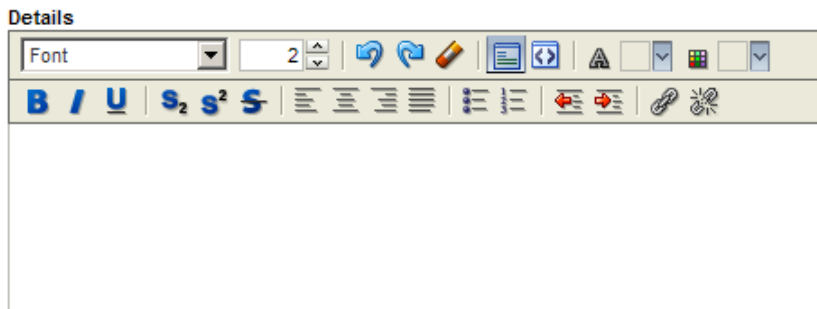
- **Name**
- **Description**
- **Status**
- **More Details**
- **Edit**

## More Details

When the **More Details** section of an object is expanded you can view additional attribute information pertaining to your currently selected object such as **Tags**, **Date Created**, **Created By**, and so on. All of the flex, or custom, attributes enabled for the object type by the administrator are displayed.

## Rich Text

The **Rich Text** attribute for objects presents a way for users to enhance the content quality. Users can enter or paste formatted text in the **Rich Text** field. When pasting content, any hyperlinks are automatically opened in a new window when they are selected by a user.





The text content of the **Rich Text** field is indexed for searching in CNM, just like the contents of any other text field. The **Rich Text** field is available as one of the fields in Advanced Search when it is enabled. The set of filters for this field are the same as that for any text field. However, the **Rich Text** field is not displayed as a column in search results and cannot use the **Query By Example** functionality. When exporting an object to XML, the formatted content of the **Rich Text** field (rendered in the form of HTML) is exported. **Rich Text** fields are not exported to Excel.

The **Rich Text** attribute is a hidden attribute by default. The administrator needs to make this field visible in order for users to have access. For more information, see [Object Attributes](#) on page 61.

## Modifying Object Attribute Details

### To modify attributes of an object:

1. Open an object.
2. In the **Summary** section click .
3. The **Summary** and **More Details** sections expand and editable attribute fields are now in Edit mode.
4. Enter new values of attribute fields and then click  to finish.

## Attachments

**Important** In order for Agile PLM and Agile CNM integration to work for the **Attachments and References**, a user must deploy the agile-cnm-plugin.jar file to the Agile PLM server. Please refer to the *CNM Implementation Guide* for details.

There is an **Attachments & References** section for all objects. If your administrator has selected Agile PLM as the file server, then Agile PLM is also used for user authentication. If the administrator has selected UCM as the file server, then LDAP or Agile PLM are used for user authentication.

A user with a Participant role or higher can add, view, or remove attachments and references. A user with the Viewer role can only download or view attachment files, URLs or References.



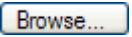
**Note** If Agile PLM is the selected file server, then to work with attachments in CNM, a user needs to have the proper file folder privileges in Agile PLM. See the *Agile PLM Administrator Guide*.

## Adding Attachments

For more information about the availability of adding attachments, the required settings, and the Agile PLM file folder subclass relationship to CNM attachments, see Establishing System Settings.

**Important** It is necessary for a file server (Agile PLM or UCM) to be installed and configured outside of CNM in order to upload and retrieve file attachments in CNM. If this has not been performed properly prior to adding attachments, you will not be able to add attachments because the Add File option is disabled. For more information, see Establishing System Settings and refer to the *CNM Implementation Guide* for specific file server information.

### To add an attachment file:

1. Go to the **Attachments & References** section of an object and click .
2. From the list menu choose  File |.
3. In the **Add File** window click  to choose a file to upload.



4. In the **Choose File** window navigate to the location of your file, select the file to attach and click **Open**.
5. Enter any desired content in the **Description** area of the **Add File** window and when finished click **OK**.
6. If you click **Browse...** and select a file that is already an attachment, CNM displays a **Confirmation** window that prompts, "File <attachment> already exists on <object>. Please confirm to overwrite."
7. Click **OK** to confirm, or click **Cancel** to not overwrite the file.

---

**Note** If the Agile PLM file server is used and the user has the necessary privileges, when the user adds a file attachment to a CNM object, then a corresponding file folder object is created in Agile PLM and the file is added to the **Files** tab of the file folder object.

---

#### To add an attachment URL:

1. Go to the **Attachments & References** section of an object and click .
2. From the list menu choose  **URL**.
3. In the **Add URL** window enter text into the **URL** field and any desired content into the **Description** field.
4. Click **OK** to finish.

If you add a URL that is already on an object, CNM automatically overwrites the previous entry and displays that URL as the latest entry for attachments.

---

**Note** If Agile PLM is the selected file server, then to work with attachments in CNM, a user needs to have the proper file folder privileges in Agile PLM. See the *Agile PLM Administrator Guide*.

---

## Viewing Attachments

Once attachments are added to an object, they are displayed in reverse chronological order with the most recent being found at the top of the list. Once the object has an attachment in the **Attachments & References** section, the following information is displayed:

- Attachment type icon
- View icon
- Fulfilled Checkmark
- Delete option
- Attachment Name
- Attachment Description
- File size

- First Name and Last Name of the user that added the attachment
- Date and Time the attachment was added

Attachments & References					
			http://www.bestinformation.c...	Mariah Thomas	02/09/2011 09:02:07 PM GMT
			P00009	test	Mariah Thomas
					02/09/2011 09:01:35 PM GMT
			TOC1.bmp	This is great.	1,164,886
				Mariah Thomas	02/09/2011 08:59:44 PM GMT

### To view an object's attachment:

1. Go to the **Attachments & References** section of an object and click the attachment filename.
2. From the **File Download** window choose whether you would like to open or save the attachment.
3. If you choose to save the file, pick a location locally on your computer to save the file and then click **Open**.
4. After you click **Open** the file opens and you can view the content. You can open the file using a native application or save it to your hard drive.
5. Clicking launches the viewer to see the attachment file directly.

**Note** If Agile PLM is the selected file server, then to work with attachments in CNM, a user needs to have the proper file folder privileges in Agile PLM. See the *Agile PLM Administrator Guide*.

**Important** If the necessary AutoVue has not been installed or is experiencing its own application errors, then you cannot successfully view your attachments in a browser. For more information, see [Establishing System Settings](#) on page 72 and refer to the CNM *Implementation Guide* for specific AutoVue information.

## Removing Attachments

### To remove an object's attachment:

1. Go to the **Attachments & References** section of an object and click next to the attachment or reference you wish to remove.
2. You are then prompted in a **Confirmation** window, "*Confirm deletion of the <attachment type>: <filename>.*"
3. Click to confirm and finish.

If the UCM file server cannot be reached, the attachment is still removed and a message displays stating that the corresponding file needs to manually be removed from the UCM file server. If the Agile PLM file server cannot be reached, the attachment is still removed and a message displays to the user stating that the corresponding file needs to manually be removed from the Agile PLM file server. If the user does not have the user privileges to delete folders in Agile PLM, the CNM attachment is still removed and the corresponding folder still needs to be manually removed from Agile PLM.

---

**Note** If Agile PLM is the selected file server, then to work with attachments in CNM, a user needs to have the proper file folder privileges in Agile PLM. See the *Agile PLM Administrator Guide*.

---





## References

A reference is an index link to a record present in an external system. References bring greater enrichment of CNM data with existing product designs or projects. References also provide backward traceability from products and projects in the Agile product lifecycle management system to the CNM requirements that led to those products or projects.

References are available on reference-enabled objects to increase the association of CNM objects to Agile product lifecycle management system objects. User authentication needs to be set up against the Agile product lifecycle management system in order for the **Reference** option to be available in the **Attachments** list menu.

## Adding References

To add a reference to an object:

1. Go to the **Attachments & References** section of an object and click .
2. From the list menu choose  **Reference**.
3. In the **Add Reference** window select the object type of Items or Projects, enter your search text string, and click .
4. You can then drag your desired reference item from the **Search Results** table to the **Attachments & References** section, or select the item in the **Search Results** table and click  to finish.

The **Add Reference** window, mentioned above, allows you to search for an item or project and see the results in a table format to select the desired reference.

**Note** The results are limited to 1000 entries.

**Add Reference**

Items ▾ \*55

**Search Results**

View ▾	Number	Description	Status	Type	Rev
	009-001-X055	This is an important part.	Preliminary	Part	
	009-001-X155		Preliminary	Part	
	334-1008-02		Production	Part	01
	D00055	This is an important document	Preliminary	Document	
	J_550		Production	Part	01
	M_550		Production	Part	01
	P00055		Preliminary	Diode	
	P00155		Preliminary	Assembly	
	P00255	This is an important part.	Preliminary	Part	

Total Rows :9

Help OK Close

You can expand the search result assemblies to display the first level of BOM items and add either assembly or any first level BOM item as your desired reference. The displayed attributes of items or projects within the search results is dependent on the Agile PLM settings for those attributes. If an attribute is enabled for the BOM table within Agile PLM then the search results in CNM will display the attribute.

**Note** In order to add a Project as a reference, the user needs the Read privilege for General Info.Number in PLM enabled. This privilege is not assigned to the default roles and therefore may require the administrator to grant users this privilege.

From the **Add Reference** window search results you can drag and drop items from the table into the **Attachments & References** section to add the object as a reference. The ability to drag and drop references includes not only the currently open object, but also any object that is displayed in the open **Explorer** structure. For more information on dragging and dropping within an **Explorer** structure, see [Rearranging an Object Structure](#) on page 34.

If you add a reference that is already on an object, CNM overwrites the existing reference and moves that reference to the top of the list. The action of adding references to objects in CNM also produces a cross reference for that reference object in its native application. For Item object references, the cross reference is a URL present on the **Attachments** tab, and for Project object references, the cross reference is a URL present on the **Content** table.



## Viewing References

To view an object's reference:

1. Go to the **Attachments & References** section of an object and click the active link of the reference name.
2. You are brought to the native application of the reference.
3. The application directs you to the Cover Page of the reference object.

## Removing References

To remove a reference from an object:

1. Go to the **Attachments & References** section of an object and click .
2. You are then prompted in a **Confirmation** window, "*Confirm deletion of the Reference: <reference\_number>.*"
3. Click  to confirm and finish.

The action of removing references from a CNM object also removes the cross reference for the reference object in its native application.

---

**Note** If the reference object business rules (Roles, Privileges, State, Lifecycle, Workflow, and so on) do not allow the cross reference to be removed from either the Item **Attachment** tab or the Project **Content** table, then the server does not remove the cross reference and the cross reference link is only removed from the CNM **Attachments & References** table.

---

## Fulfilled Attachments and References

Attachments and references have a checkmark icon to indicate if that particular attachment or reference fulfills a requirement outlined by the object or project. The checkmark becomes blue to indicate that the attachment or reference fulfills the requirement. By clicking the icon a second time you deactivate the checkmark and the icon returns to a gray color.





If a file attachment is replaced by a file that has the same filename, the current status of the fulfilled checkmark remains the same. When a user performs a save as operation from an object with attachments or references in a particular state of fulfillment, the current state is transferred to the new object for those attachments and references. Once an attachment or reference fulfillment status indicator is modified (checked/unchecked), that attachment or reference is immediately moved to the top of the **Attachments and References** table.

## Notes and Comments


There is a **Notes** section of objects that allows notes and comments to be added. All users can post a note or comment. As notes and comments are posted they are displayed in reverse chronological order with the most recent seen on top. The content of each comment is displayed below the note it

is connected with, but is indented. With each note or comment, the name of the user and the time that he/she added the comment is logged.

**To add a note to an object:**



1. From the **Notes** section click .
2. In the **Add Note** window enter your text into the required **Note** field.
3. Click  to finish.

**To add a comment to a note:**

1. Go to the **Notes** section of an object.
2. Find the note you want to add a comment to and click [\(Add\)](#).
3. In the **Add Comment** window enter your text into the required **Comment** field.
4. Click  to finish.

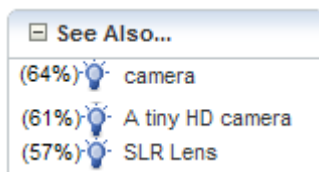
Only a user with the Administrator role can delete notes or comments. If you have Administrator access, a **Delete** link is available at the end of each note or comment.

**To delete a note or comment from an object:**

1. From the **Notes** section click the expand icon .
2. Navigate to the note or comment you wish to delete and click [\(Delete\)](#).
3. You are then asked, *"Do you want to delete the selected note/comment?"*
4. Click  to confirm and finish.

## Leveraging the See Also...

CNM objects have a **See Also...** section that helps users see correlation between objects in the CNM system.



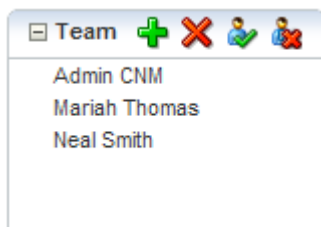
The display shows a percentage, an object type icon and an active link of the object name. Each object has a set of object keywords, which are generated using the algorithm described in the [Keyword Generation](#) on page 69 section. Using an object's keywords, CNM finds similarities with other objects in the system and associates these objects together for the user in the **See Also...** section. The percentage of similarity is calculated between the objects within CNM and only the top five associations are included in the **See Also...** section.

**Note** If you are not a team member of an object, the object still displays in the **See Also...** section, but you cannot navigate to it.

If a user modifies an object in such a way that content used for keyword association changes, the **See Also...** section only refreshes once the object is saved. For more information about keywords, see [Keyword Library](#) on page 69.

## Managing Object Team

When you are viewing an object there is a collapsible and expandable right pane **Team** area where the currently assigned team members are displayed.



You can add or remove team members if you have a Participant role or higher. The creator of an object is always added to the **Team** list. If the object type has a configured default value for **Team**, that default value is displayed in the **Team** area. When user groups are deleted by an administrator they are automatically removed as team members for objects they were associated with.

**Important** If you modify the team of an object so that it removes you as a team member, whether it is specifically removing your user name, or it is removing all user groups you belong to, once you save that change and navigate away from the object, you will no longer be able to open that object. If you try to open that object in the future, you will be alerted that your access is denied because you are not a team member of the object. If any user with a Participant role or higher removes all the teams from an object, the object is no longer accessible by any user.

## Adding a Team

**To add a team member to an object:**

1. Open an object.
2. In the right pane go to the **Team** area.
3. Click .
4. In the **Add Team** window search for a user(s) or user group(s) to add to the object.
5. Select the desired entries and click . When you have chosen your last selection click to finish.

## Object Structure Team Association

Team members are also an inherited association between objects. When an object is added to the structure of another object, the parent object's team is added as a team for the newly added object.

Also, when an object that has a child structure is added to a parent object as its new child object within an existing structure, any team members from the parent object are associated to all the children objects of the newly added object. To illustrate this behavior, see the example below.

Create an object *QuoteX* with a child object *ReqY*, which also has a child object *IdeaZ*.



Next, add yourself as the only team member of all three objects. In this example your user name is *Mariah Thomas*.

---

**Note** You may need to remove any default teams for these objects to be sure that the only team member is you.

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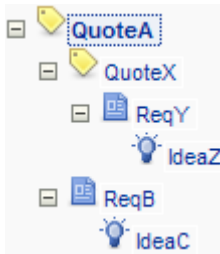
Create a new object *QuoteA* with a child object *ReqB*, which also has a child object *IdeaC*.



Add yourself, (*Mariah Thomas*), as a team member to all three objects and also add a user group, such as *Cats*, to all three objects as a team member.



Open *QuoteA* and click  in the **Explorer** area to add an object to the structure of object *QuoteA*. From the **Add Team** window choose the object *QuoteX* that you created earlier, which does not have the team member *Cats*. The structure of *QuoteA* now appears like this:




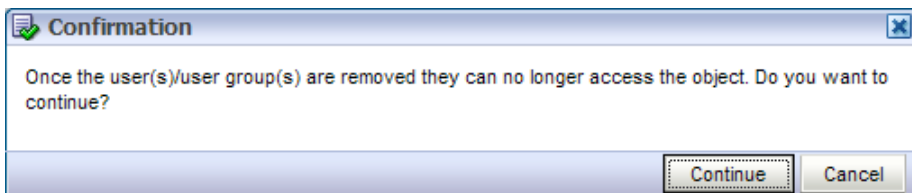
In the **Team** area of *QuoteX*, *ReqY*, and *IdeaZ* the user group *Cats* has automatically been inherited since it was a team member of the parent object *QuoteA*.

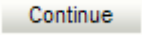


## Removing a Team

To remove a team member from an object:

1. Open an object.
2. In the right pane go to the **Team** area.
3. Select the team member(s) you want to remove and click .
4. A **Confirmation** window appears:

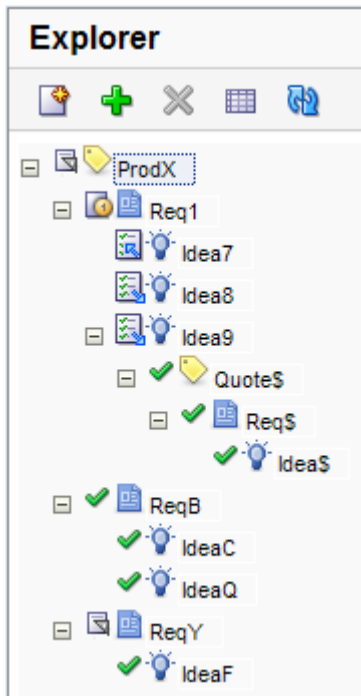


5. Decide if you want to remove the team member from all the objects in the structure and click  to finish.

**Caution** If you remove yourself, or your user group, you no longer have access to the object, even though you are performing the action.

## Working with Explorer

When you are viewing an object there is a collapsible and expandable left pane **Explorer** area.



---

**Note** By default, a user sees the structure of an object with its child objects expanded to only one level.

---

The **Explorer** area has the following actions available:

- **Create** — add an object to the current structure by creating a new object
- **Add** — add an object to the current structure by searching for an object
- **Remove** — remove an object from the current structure
- **View** — view the object attribute details for every object within the multi-level object structure in a table format
- **Refresh** — refresh all levels of the object structure and collapse the child levels




All object types can be a part of an **Explorer** structure. From the **Explorer** structure you see the status of each parent and child object giving you an overall perspective of the progress of each element within an entire project hierarchy. The icons associated with object status can each be unique and controlled by the administrator from the **Administration** section. For more information, please see [Status List](#) on page 65.

Like the search results restrictions, if you do not have access to an object because you are not a team member, the object does not appear in the **Explorer** structure. If you select a child object from the **Explorer** structure, the child object's **Summary** section opens, but the **Explorer** pane still provides

the structure of the initially open parent object. As objects are added, removed, or rearranged, the Explorer structure will update the arrangement of child objects alphabetically.

## Creating New Objects from Explorer

To create a new object from the Explorer menu:




1. In the **Explorer** structure of an object, select the object you want to create your new object under.
2. From the **Explorer** menu click .
3. The **Create** window appears. Choose the object type from the **Type** dropdown list and enter a name in the **Name** field.
4. Click  to finish that object creation process.
5. You can continue to create more objects that are automatically added to the **Explorer** object structure, or click  to finish.

The creation process can continue seamlessly by clicking Enter on your keyboard after each creation. Once the **Create** window is open, you can navigate to different object structure levels of parent and child objects in the background and return to the **Create** window to continue creating objects to add to the structure level that you navigated to.

As you create (or add) objects that become child objects in a structure, the team of the parent object is added to all the child objects automatically, so that you now have access to all the child objects created (or added). For more information, see [Object Structure Team Association](#) on page 28.

## Adding an Object to a Structure

To add an object to a structure:

1. In the **Explorer** structure of an object, select the object you want to add your object under.
2. From the **Explorer** menu click .
3. In the **Add Structure** window select the type of object you are searching for, enter your search text string, and click .
4. From the **Search Results** table select the object you want to add and drag it to the object structure level you want, or click  to finish.

Child objects added to a structure are displayed at the level of the structure that was selected and highlighted before the add action began. If you drag and drop an object(s), you can determine which object in the structure you would like to be the parent object, regardless of what was previously highlighted.

From any search results in CNM a user can right-click a row or cell and access a **Copy** function. This copies the currently selected object to an internal CNM clipboard. A user can now navigate to a structure of an object in the **Explorer** area and paste the copied object as an addition to the structure.

**To paste an object into a structure:**

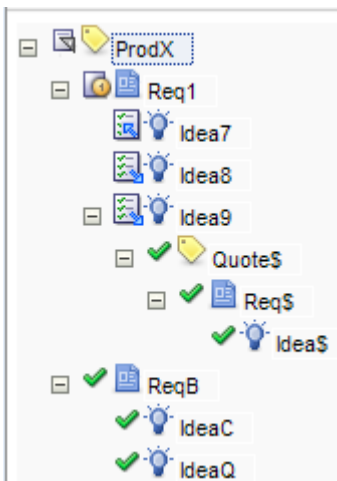
1. From a Search Result table, highlight the row(s) you want to copy and right-click.
2. Click **Copy**.
3. In the **Explorer** structure of an object, select the object you want to add your copied object(s) under.
4. Right-click and select **Paste**.



For more information about the right-click menu in the **Explorer**, see [Viewing an Object Structure](#) on page 33.


## Object Structure Duplication and Recursion

The rules governing the structure of an object provide a way to prevent unnecessary duplication and recursion of objects. CNM does not allow repeated objects at the same structure hierarchy level of an object. To illustrate this behavior, see the example below.

Open an object that has child objects, such as *ProdX*. Expand the object structure and see its child object *IdeaQ*. Be sure to still have *ProdX* selected and highlighted.



Click  and search for *Req1*. Select *Req1* from the **Search Results** table and click .

You are then prompted with, "Adding duplicate child <Req1> is not allowed". Click  to confirm and the action does not take place.

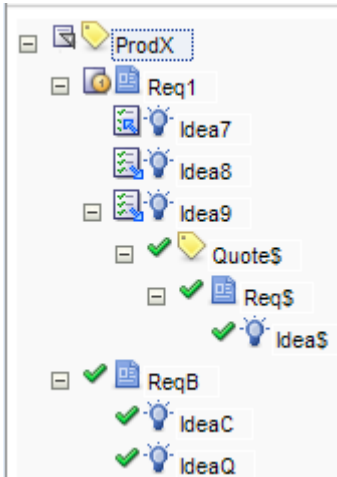
---



**Note** CNM decides if an object is being repeated according the object number. If there are two or more objects with the same object name, but with different object numbers they can be placed at the same level in an object structure.


---

Regardless of whether or not you can currently see parent objects, CNM will not allow parent objects to become child objects of an already existing child object of its own. The **Where Used** option from the **More Actions** menu will show you whether or not the currently displayed object also has a parent object that is not shown in the **Explorer** area, unless you are not a team member of the parent object. For more information about the **Where Used** option, see [Where Used](#) on page 46. To illustrate this behavior, see the example below.

Open an object that has child objects, such as *ProdX*. Expand the object structure and see its child object *IdeaQ*.

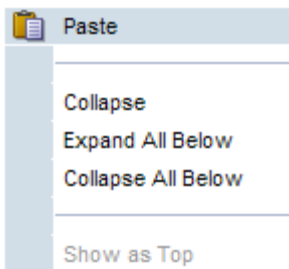


Click *IdeaQ*, then click  and search for *ReqB*. Select *ReqB* from the **Search Results** table and click .

You are then prompted with, "Recursion found for adding object <ReqB>, action denied." Click  to confirm and the action does not take place.

## Viewing an Object Structure

A user can right-click on an object within a structure to bring up a menu for collapsing and expanding the structure.



If an object is currently only displaying the top level object, the menu will have the **Expand** and the **Expand All Below** options. If an object is currently expanded to all levels, the menu will have the **Collapse** and the **Collapse All Below** options. If the object structure is only expanded to a certain level with child objects still hidden as collapsed objects the menu will still have the **Collapse**, the **Expand All**

**Below** and the **Collapse All Below** options.

For more information about the **Paste** function, see [Search Results](#) on page 12.

## Rearranging an Object Structure

You can rearrange the structure of an object by dragging and dropping child objects from one level to another.

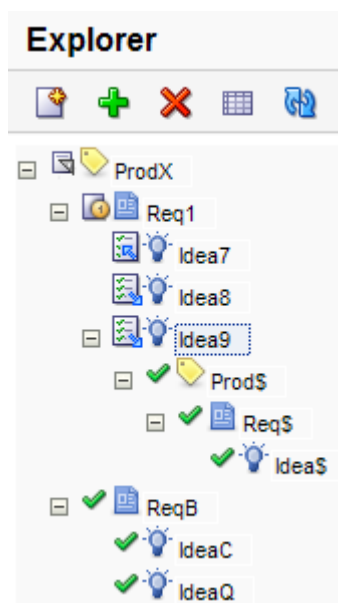
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**Note** The ability to drag and drop an object is available as long as the entire object name is visible. If the name is cut off, extend the left pane or rename the object.

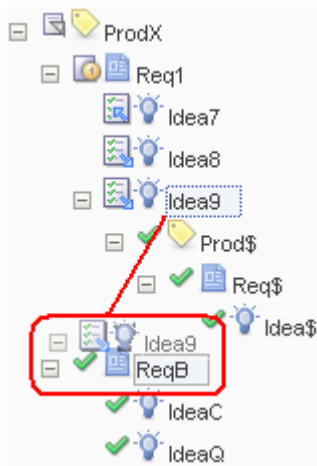
---

Objects may be selected and dragged one at a time. As the pointer is dragged through the structure, a highlight is shown on each object as it is passed over to indicate that object will become the new parent object if you drop your selection there. To illustrate this behavior, see the example below.

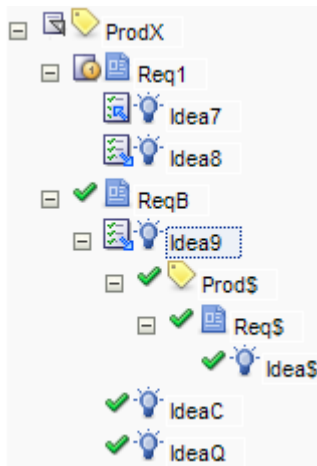
Open an object that has child objects, such as *ProdX*. Select one of its child objects, such as *Idea9*.



Now drag *Idea9* to another child object, *ReqB*, and see that the *ReqB* object is highlighted.




Once the *ReqB* object is highlighted, drop *Idea9* and it becomes the child object of *ReqB*.



## Removing an Object from a Structure

Removing an object from another object's structure does not cause the child object to be deleted from the CNM application. Instead, the branch/es underneath become branch/es of the next level up object making it the new parent object and focus then moves to that object.

**To remove an object from a structure:**



1. Open an object that has a structure.
2. Click the child object you want to remove.
3. Click  to finish.

## Structure Table View

The **Structure Table View** is a way to see the object attribute details for every object within a multi-level object structure.

**Note** By default, a user sees the structure view of an object with its child objects expanded to only one level.

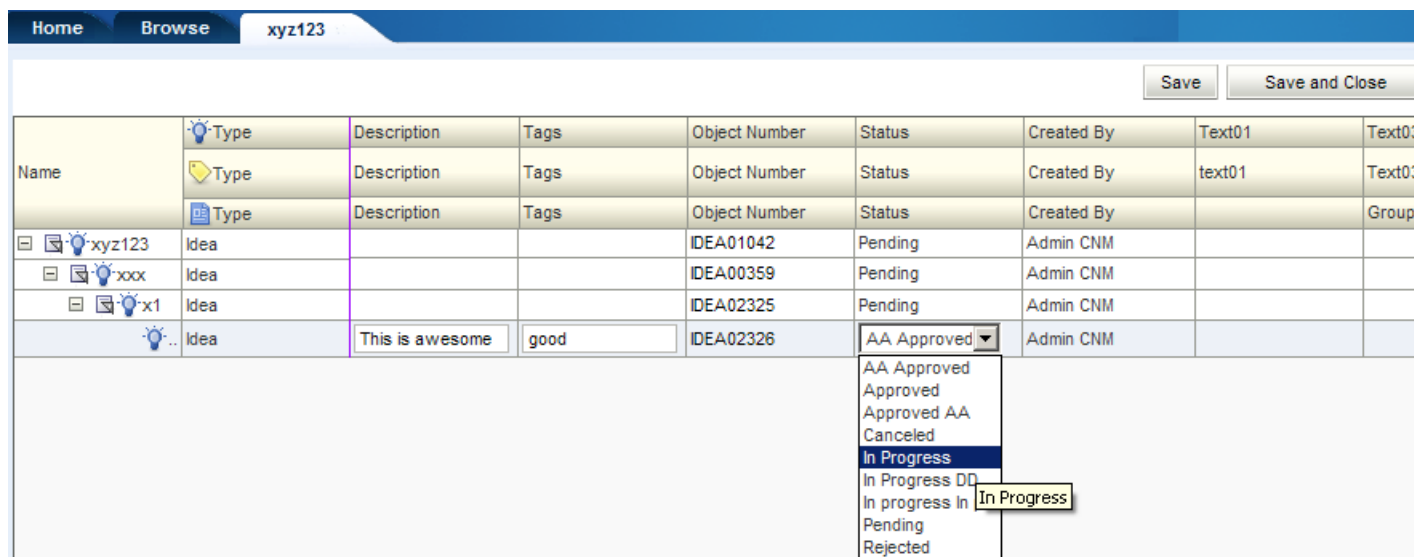
**To view the Structure Table of an object:**

1. Open an object that has a structure.
2. Click .
3. The Structure Table View page appears. Expand all the levels of the parent object to see every object's attributes.
4. Click  to finish.

The Structure Table is configurable because a user can drag and drop columns into the desired order. For more information about reordering columns, see [Table Column Reorder](#).

## Editing Object Attributes in Structure View

Once a user clicks **View** and is brought to the structure view page of an object, the user can edit attributes of objects directly from the table display. Only users with privileges to modify objects can edit object attributes in the structure view. The editable attributes include all flex fields except the **Rich Text** field.


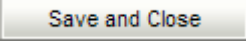



The screenshot shows the Structure Table View for an object named 'xyz123'. The table has columns: Name, Type, Description, Tags, Object Number, Status, Created By, Text01, and Text02. The 'Status' column for the last row (IDEA02326) has a dropdown menu open, showing options: AA Approved, Approved, Approved AA, Canceled, In Progress (highlighted), In Progress DD, In progress In, Pending, and Rejected. A tooltip 'In Progress' is visible next to the 'In Progress' option.

Name	Type	Description	Tags	Object Number	Status	Created By	Text01	Text02
xyz123	Idea			IDEA01042	Pending	Admin CNM		
xxx	Idea			IDEA00359	Pending	Admin CNM	text01	Text02
x1	Idea			IDEA02325	Pending	Admin CNM		Group
...	Idea	This is awesome	good	IDEA02326	AA Approved	Admin CNM		

**To edit object attributes from the structure view page:**

1. Click **View**.
2. Click in any cell of an editable attribute.

- Once the row of cells becomes editable, enter in the content you want to add or change or select values from available dropdown menus.
- Click  or  to apply your changes to all affected object attributes. Click  to remove all your entered changes and return to the object tab.

## Changes In Process

As changes are made to row cells, a yellow highlight indicator alerts the user that a change was made as the user navigates throughout different cells. Once the changes are saved, the yellow highlight indicator disappears and the cells return to their normal state.


Description	Tags
This is great	
I need this	
	new

## Update Conflicts

It is possible that in the Structure View of an object there is an object that occurs twice, under two different parent objects. Because this is possible, it is also possible that a user may make a change in one instance of the object and enter a conflicting change to the same object elsewhere. CNM will only apply one change for that object's attribute and there is no way for the user to know which change will be accepted.

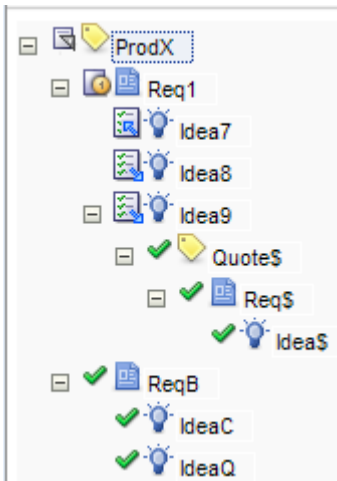
If there is an error in any of the object attributes edited, the Save operation will fail for all changes made and the user is notified which row cell needs correction before all the changes are saved. The user can navigate easily to the row cells that need correction as they are marked in red. Then the user can proceed to save their changes successfully.

## Refreshing Objects in Explorer

Clicking **Refresh**  reloads the latest changes of an object's structure to reflect the most current information. If another user is making changes that you need to know about, the refresh feature makes it possible for you to know what changes have been applied.


To illustrate the **Refresh** behavior, see the example below.

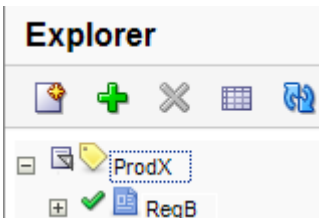
Open an object that has child objects, such as *ProdX*. Expand multiple child object levels of *ProdX*.



Make changes to the first level child object, *Req1*, and save your changes.

Another user, *UserB*, in another session modifies *ProdX* by removing the child object *Req1* from the structure entirely.

Now click  and see that the child objects of *ProdX* collapse up to the first child object level and now *Req1* is no longer a child object of *ProdX*.



## Object Signoffs

### Sending an Object for Review

All users with access to an object as a team member can be assigned as an approver of an object, but a user group cannot be assigned as an approver. The **Approve** and **Reject** buttons are the mechanisms for signoff and are displayed on objects that are assigned to you as a reviewer. The **Approve** and **Reject** buttons display regardless if you have signed off or not. Any user with a Participant or higher level of access can send an object for review to a team member or members.

**To send an object for review:**

1. Go to the **Team** area of an object.
2. Select the member(s) you want to review the object.

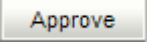
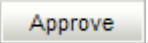
- Click  and in the **Send For Review** window enter a message for the user(s).

The team member(s) assigned a review have a Signoff Pending icon beside their user name in the **Team** area and the currently assigned object displays in the **My Pending Reviews** section of the **Home** page for the user(s). Once a user approves or rejects the object their icon changes accordingly.

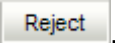
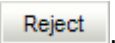
## Executing Approvals and Rejections

When a user navigates to an object, any signoff requests or last approval status and information for that user displays at the top of the object along with a signoff pending or current review status icon by the user name in the **Team** area for that object. This lets a user know that he/she needs to approve an object or if he/she has completed the review.


### To approve an object as an assigned reviewer:

- Open an object and click .
- In the **Approve** window enter your comments into the **Comments** field.
- When you are finished click .
- The **Notes** section of the object now contains the approve action and any accompanying notes entered along with your approval status and the time stamp you performed the action.

### To reject an object as an assigned reviewer:

- Open an object and click .
- In the **Reject** window enter your comments into the **Comments** field.
- When you are finished click .
- The **Notes** section of the object now contains the reject action and any accompanying notes entered along with your rejection status and the time stamp you performed the action.

Once the user approves or rejects the object, an approved or rejected icon displays next to the user name in the **Team** area for that object. Also, a message displays above the **Summary** section that alerts the user that he/she approved or rejected the object. A user can sign off multiple times for one object as long as he/she is still an assigned approver regardless of what the first signoff status

was. A signoff assignment for a user can be reset by clicking the **Reset Signoff**  button, which removes any signoff icons next to that user name in the **Team** area. However, that same user can be reassigned as a reviewer and once again the signoff pending icon displays by the user name in the **Team** area and a signoff request alert displays at the top of that object page. For more information about resetting signoffs, see [Resetting Signoffs](#) on page 40.



Users who have been assigned as reviewers and therefore have correlating status icons for the review status (Signoff Pending, Approved, and Rejected) are moved to the top of the **Team** area of an object. This grouping of team members is then sorted according to signoff status and alphabetical user name order. The remaining team members who do not have a review assignment

status are sorted alphabetically below.

## Resetting Signoffs

If signoffs on an object are no longer required, or when a new set of signoffs is required, then a user may choose to reset past signoff indications against that object's team.

**To reset signoffs for an object under review:**

1. Go to the **Team** area of an object.
2. Select the member(s) that has/have a current signoff status indicator that you want reset.
3. Click .
4. In the **Confirmation** window it reads, "You are about to reset the current signoff status for the selected users. Would you like to continue?" Click .
5. The selected member(s) no longer have any review status icons next to their username(s) in the **Team** area.

This process also removes the message at the top of the object alerting a user that he/she needs to complete a review. However, if the user already completed an action that information still displays.

## Receiving Notifications

Notifications are sent to users when the following actions occur in CNM:

- User is notified when he/she is added as a team member for an object in order to perform a signoff action

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**Note** Users that created an object and are therefore team members by default or are members of a default team assigned to a type of object by default are not sent notifications for being added as a team member at that time.

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- User is notified when another user sends an object using the **Send** action
- User who authored a note on an object is notified when a comment is added following that existing note
- User who is assigned as a reviewer of an object is notified when the assignment is given
- User who assigned reviews is notified when the reviews are completed by each user

## Performing More Object Actions

There is a **More Actions** dropdown menu found in the top right corner of the page as a user is working in an object. The **More Actions** menu has the following available:


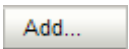



- Add to Favorites
- Save As
- Delete

- Send
- Export
- History
- Where Used

## Save As

The option to Save As is enabled only for users with a Participant role or higher. Save As creates a new object of the same object type, but with a new object number. All of the object attributes are copied over to the newly created object including tags, Rich text content and attachments. References, notes, comments, team, and history are not copied over to the newly created object.

**To create an object using Save As:**

1. Open an object.
2. Go to the **More Actions** menu and click .
3. In the **Save As** window enter text into the **Name** field and any desired content into the **Description** field.
4. To add a team to the object click . You can also type in usernames or user group names and CNM will prompt you with existing user names to add.
5. In the **Add Team** window choose to search for a user or user group.
6. Enter the criteria for your search in the text field and click .
7. From the search results select the member(s) you want and click .
8. In the **Save As** window click  to finish.

If you do not select any team members to add to your newly created object, CNM automatically adds you, the creator, as the default team member. Any other teams you want on the object need to be specially selected during the Save As process.

Users can access a hyperlink to navigate to either the source or target object of a Save As operation within the History table. Clicking the hyperlink opens a new tab with the object content. For more information, see [History](#) on page 44.

## Replicating Structure with Save As

In the **Save As** window there is an essential component for objects that have any child objects. You will find a **Replicate structure** checkbox as seen below:

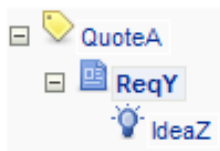
This checkbox is marked by default for all objects being created using an original template object with an existing structure of child objects. If you uncheck the box then you simply create a new object with your set criteria that has no child objects associated with it.

The replicate structure function performs the same Save As process for each child object of the parent object and maintains the hierarchy levels and dependencies already existent on the original template object. To illustrate this behavior, see the example below.

Create an object *QuoteX* with a child object *ReqY*, which also has a child object *IdeaZ*.



Next, perform a Save As for the parent idea object *QuoteX* and leave the **Replicate structure** checkbox selected. Rename the quote to *QuoteA*. The structure of that quote is now shown in the **Explorer** area as this:



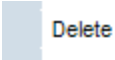

The result is a new object hierarchy that has a structure identical to the original object's, but is composed of entirely new objects. If you open the *ReqY* and the *IdeaZ* objects on the *QuoteA*

structure, those objects have the same attributes as the originals, but have new object IDs.

## Deleting an Object

Deleting an object permanently removes the object from CNM. There is no ability to restore deleted objects. However, if an object is currently associated with an object structure, either as a parent or child object, it cannot be deleted. Also, if an object has an attachment or reference then you cannot delete the object.


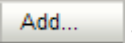

### To delete an object:

1. Open an object.
2. Go to the **More Actions** menu and click .
3. You are asked, *"You are about to delete the current object. Once the object is deleted, it cannot be recovered. Do you want to continue?"*
4. Click  to confirm and finish.

## Sending an Object

Users in CNM can send objects to one another if in Administration the mail server is configured properly. For more information, see [Establishing System Settings](#) on page 72. The Send operation initiates a notification email to be sent to a user that provides information about that object and any comments the user includes while sending the object. This utility is an excellent way to initiate collaboration surrounding objects and their various changes. If you perform any actions to an object and want other users to know about it, you can send the object with the pertinent information within the **Notes** section.

### To send an object:

1. Open an object.
2. Go to the **More Actions** menu and click .
3. In the **Send Object** window click  to search for a user(s) or user group(s) to include in the **Recipient** field. Multiple users or user groups can be included if separated by a semicolon (;). You can also type in usernames or user group names and CNM will prompt you with existing user names to add.
4. Enter any desired text in to the **Notes** field and click  to finish.

If any of the recipients are not already part of the team of the object being sent, you are prompted at that time to possibly add them to the team of the object. Recipients who are not added to the team do receive notifications, but cannot access the object.

When you receive a notification it will provide the following information:

- Name and email of who sent the object notification;
- List of all the recipients;
- Subject of the notification, which includes the object type and object number;

- Body of the message with additional details;
- Notes entered by the user sending the object;
- An active link directing you to the application **Login** page and then to the open object

## Export

CNM's Export feature supports the following operation:

- Export an individual object, or an object with structure from object structures to a Microsoft Excel or aXML file
- Export from search results to a Microsoft Excel file

For detailed information about the Export operation please see the chapter on [Exporting and Importing Objects](#) on page 47.

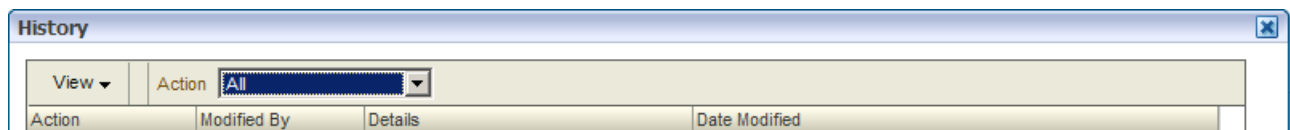
## History

The **History** of an object records the following actions or events:

- Add Attachment
- Add Component
- Add Reference
- Add Team Member
- Add URL
- Approve
- Create
- Create Comment
- Create Note
- Delete Comment
- Delete Note
- Delete Object
- Export
- Modify
- Modify Reference
- Reject
- Remove Attachment
- Remove Component
- Remove Reference
- Remove Team Member

- Remove URL
- Request For Review
- Reset Signoff
- Save As
- Send
- Signoff

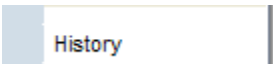

In the **History** log you see:



- **View** — to adjust the column layout
- **Action** — a dropdown list of actions, from the list found above, used as a filter for the **History** log
- **Action** — the action performed by a user to the object
- **Modified By** — username of the user who performed the action
- **Details** — the action taken along with the affected areas of the object
- **Date Modified** — the date and time of the action

**Note** By default, all **History** logs are sorted by **Date Modified** in a descending order, having the most recent activity at the top.

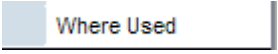
#### To access the History information of an object:

1. Open an object.
2. Go to the **More Actions** menu and click .
3. The **History** window appears and has a table displaying details about the past actions and events regarding the currently open object.
4. You can then sort the results by column headers, use **View** or filter using the **Action** dropdown.
5. When finished click .

For an object created by a Save As action, the History window has a hyperlink directing the user back to the original object. Conversely, an object that was used for a Save As action has a hyperlink within its History window directing the user to the newly created object.

## Where Used

**To access the Where Used information about an object:**

1. Open an object.
2. Go to the **More Actions** menu and click . The button is a light blue rectangle with the text "Where Used" in a dark blue font.
3. In the **Where Used** window, a table displays the object that is the parent of the currently open object.
4. The **Name** and **Number** are active links, which take you directly to that parent object's **Summary** page.

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**Note** Like the search results restrictions, if you do not have access to an object because you are not a team member, the object does not appear in the **Where Used** table.

---

# Exporting and Importing Objects

**This chapter includes the following:**

---

▪ Overview.....	47
▪ Supported Operations and File Formats.....	47
▪ Exporting Objects from CNM.....	48
▪ Importing Objects into CNM.....	53

## Overview

CNM's **Export** and **Import** features support the following operations:

- Export an individual object, or an object with structure from object structures to a Microsoft Excel or aXML file
- Export from search results to a Microsoft Excel file
- Import to update existing objects in the system (CNM server) in the Microsoft Excel format
- Create objects by using the Import process to import directly from Microsoft Excel worksheets

Using these features, you can update existing objects such as Quotes with data provided by one or more users, or import externally prepared worksheets for use in the CNM application. For example, there is usually a need to update costs for existing objects, or create costs for new ones. A convenient option is to export existing data (Quote) pertaining to the object to Excel, update it in the Excel format, and then import it back into the CNM application. Or, if there is an externally prepared Excel worksheet with applicable data, you can import the data and use it as a CNM object.

The supported file formats, along with the necessary procedures, constraints, and examples to perform these tasks appear in this chapter.

## Supported Operations and File Formats

- Export supports Microsoft Excel and aXML formats as follows:
  - **Excel worksheets** – You can export single or multilevel structures, including those from search results to an Excel worksheet
  - **aXML files** – You can export Attachments (files, URLs, and References to Agile PLM objects) plus Comments, and Where Used and Structure information from CNM to aXML files.
- Import only supports the Excel format. You can import a plain list of objects from the following sources into the system:
  - An Excel worksheet from a third-party system as a flat structure
  - Exported objects from the object's tree and search results as a flat list of objects from an

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#### Excel worksheet

---

**Note** When importing objects, Comments, Attachments, References, and Structure information are not imported and the "Level" column created during the Export process is not imported.

---

## Exporting Objects from CNM

You can export from:

- Object structures to Microsoft Excel worksheets
- Object structures to aXML files
- Search results to Microsoft Excel worksheets

## Exporting to Microsoft Excel

Exporting to Microsoft Excel from Object Structures or from Search Results prepares a spreadsheet. However, the Level column is not exported if you are exporting from Search Results or from Object Structures and you have selected the Root Only option.

---

**Note** When exporting to Microsoft Excel, only the Cover Page fields (out-of-the-box and flex fields that are enabled) are exported. Attachments, Notes, and Comments are not exported.

---

## Exporting from Object Structures

Exporting from Object Structures prepares a Microsoft Excel spreadsheet with the following formation:

- Objects are listed in the sequence in which they appear in the structure tree
- A "Level" field in the first column indicates the hierarchy of the structure, with "0" indicating root or the object that is exported, and subsequent increments of "1", "2", ... "n" representing the 1<sup>st</sup>, 2<sup>nd</sup>, ..., and n<sup>th</sup> level respectively
- All system attributes and enabled flex attributes are exported as columns under column headings pertaining to the attribute type

### To export objects to Microsoft Excel:

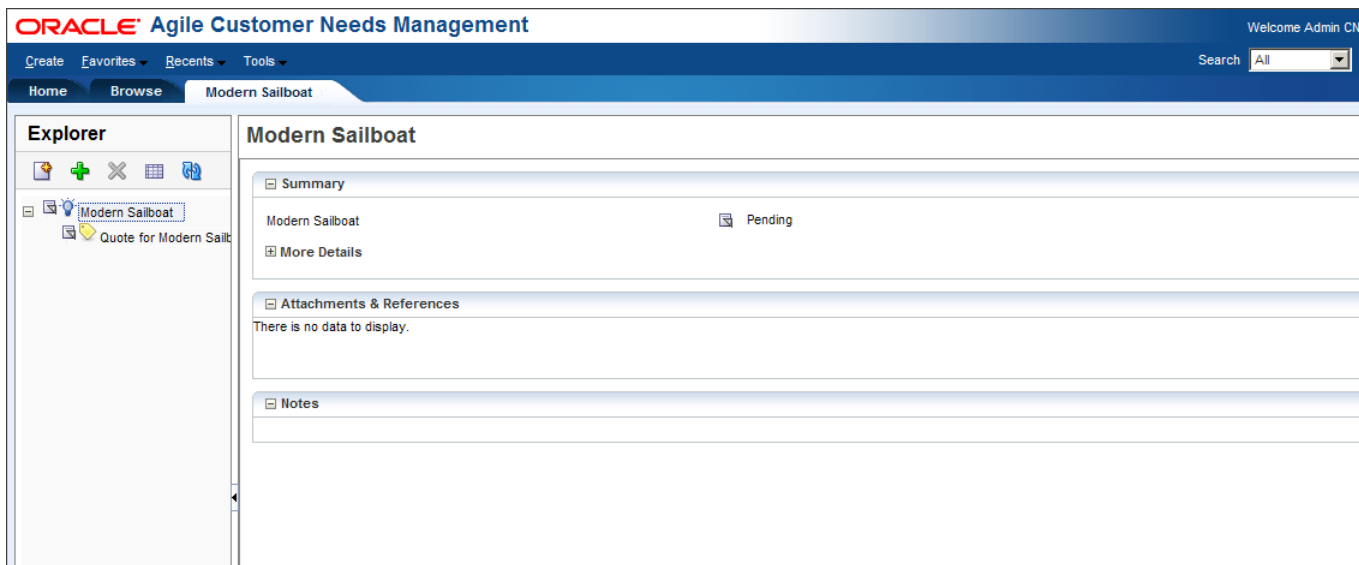
1. Log in to CNM and create an Idea object called *Modern Sailboat* and a child Quote object *Quote for Modern Sailboat*.

---

**Note** The Idea object called *Modern Sailboat* and the Quote object, *Quote for Modern Sailboat*, are created as examples to help document exporting from object structures. You can open and export an existing object structure as in this example, or create and export a new object structure. If the object was already added to **Favorites**, you can also use **Favorites** for finding and opening the object that you want to export. See Exporting to aXML Files.

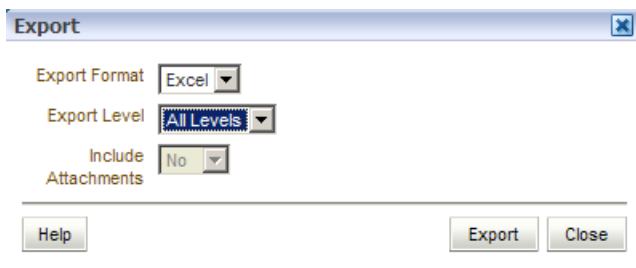
---

2. In the **More Actions** dropdown list, select **Export**.



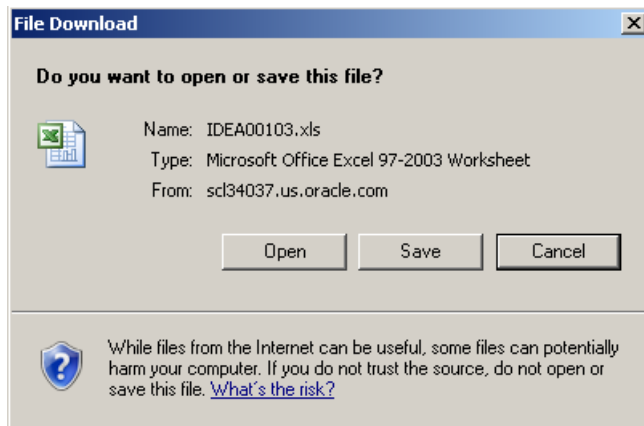
The **Export** window opens and prompts you to select your choice of Export Format and Export Level. The **Include Attachments** option is not available because export to Excel is selected.

3. In **Export Format**, select **Excel**, in **Export Level**, select **All Levels**, and then press **Export**.



**Note** In **Export Level**, you have the option to select **Root Only**, **Level One**, or **All Levels**. Selecting **Root Only** will export the **Root** object, which in this case is the **Idea** object. Selecting **Level One**, will export the next level, which in this case is the **Quote** object. Selecting **All Levels**, will export the **Idea**, **Quote**, and applicable levels to Excel.

- A window prompts you to open or save the file. You can save the file for modification in Excel and for subsequent import it into CNM.



Level	Name	Description	Tags	Object Number	Type:Idea	Status	Date Created	Date
Level	Name	Description	Tags	Object Number	Type:Quote	Status	Date Created	Date
0	Modern Sailboat		boat	IDEA00103	Idea	Pending	2/24/2011 19:32	
1	Quote for Modern Sailboat			QUOTE00002	Quote	Pending	2/24/2011 20:31	

**Note** You can see the "Level" column mentioned in [Supported Operations and File Formats](#) on page 47 in Column A. When you import this file into the system, this column is not imported.

## Exporting from Search Results

This process prepares a worksheet as follows:

- Search Results are only exported to Microsoft Excel
- Level is not exported when exporting from Search Results
- If no rows are selected in the Search Results table, Export will export all rows, but if one or more rows are selected, Export will only export the selected rows
- No export window is launched during the export process
- If objects in search results have a structure, Export from search results will only export the root object
- Exported objects are not listed in the same sequence in which they appear in the Search Results table

### To export from Search Results:

- Log in to CNM and in the **Browse** tab run a search for the object *Modern Sailboat*.

Search results display in a **Search Results** table, as seen below. You can select any object in the table for export. See [Searching in CNM](#) on page 10.

The screenshot shows the 'Advanced Search' interface. It includes a 'Match' section with radio buttons for 'All' and 'Any'. Below this are several search criteria fields: 'Type' (set to 'Equal to'), 'Name/Number/Desc' (set to 'Contains Phrase' with value 'Modern Sailboat'), 'Name' (set to 'Contains'), 'Description' (set to 'Contains'), 'Number' (set to 'Contains'), 'Tag' (set to 'Equal to'), 'Rich Text' (set to 'Contains'), 'Date Created' (set to 'Equal to'), 'Date Modified' (set to 'Equal to'), and 'Created By' (set to 'Contains'). There are 'Search' and 'Reset' buttons. Below the search criteria is a 'Search Result' section with a 'View' dropdown and a table of results.

Name	Number	Type	Description	Status	Tag	Created By	Date Created	Date Modified
Modern Sailboat	IDEA00103	Idea		Pending	boat	Admin CNM (admin)	02/24/2011 07:32:4...	02/24/2011 08:31:57 PM PST
Quote for Mode...	QUOTE00002	Quote		Pending		Admin CNM (admin)	02/24/2011 08:31:5...	02/24/2011 08:31:57 PM PST

- In the **Search Results** table, select the idea object named *Modern Sailboat* and then click the Export button.

Similar to Exporting from Object Structures, a window appears and prompts you to open or save the Excel file. Although this object has a multi-level structure, only the Root object is exported and the data displayed in this Excel worksheet does not include the Level column that appeared in Exporting from Object Structures. Also, although only a few fields are displayed in the **Search Results** table, the exported Excel file contains all the Cover Page fields (out-of-the-box and enabled flex fields).

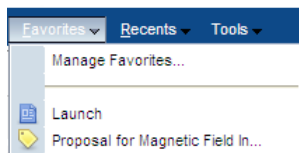
Name	Description	Tags	Object Number	Type:Idea	Status	Date Created	Date Modified	Created By	Modified By
Modern Sailboat		boat	IDEA00103	Idea	Pending	2/24/2011 19:32	2/24/2011 20:31	Admin CNM	Admin CNM

## Exporting to aXML files

The following procedure assumes a multi-level Object Structure is already created and added to Favorites. It locates and opens the object and exports the entire structure (Notes, Comments, and Attachments and References) to an aXML file.

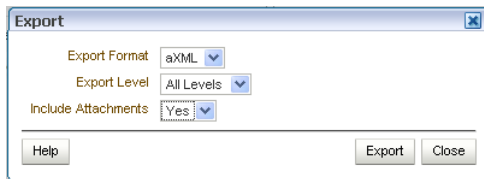
### To export object to aXML files:

- In CNM Explorer, select **Favorites > Proposal for Magnetic Field in...** to locate and open the object.



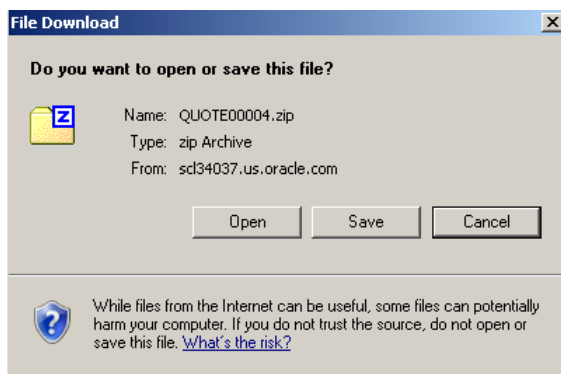
**Note** The selected object has References, URLs, Notes and Comments.

- 
2. In the **More Actions** dropdown list, select **Export**. The Export window opens.



- 
- 
3. In Export window's **Export Format**, **Export Level**, and **Include Attachments**, select the **aXML**, **All Levels**, and **Yes** options respectively, and then press **Export**.

The object along with its References, URLs, Notes, Comments, and Where Used information is exported in a .ZIP file and the browser gives you the option to save or open the .ZIP file.



- 
- 
- 
4. Save and then extract the contents of the .ZIP file.  
The aXML file and attachments (files) are included in the .ZIP file.
5. Open the aXML file.

Information related to the object such as References, URLs, Notes, Comments, and updates appear in the aXML file.

```
<?xml version="1.0" encoding="UTF-8" ?>
- <Objects xmlns="http://www.oracle.com/technology/products/applications/xml/plm/2011/04/" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xmlns:xsd="http://www.w3.org/2001/XMLSchema" xsi:schemaLocation="http://www.oracle.com/technology/products/applications/xml/plm/2011/04/
    http://www.oracle.com/technology/products/applications/xml/plm/2011/04/acnm.xsd">
- <Object type="Quote">
- <Attributes>
  <ShortDesc>Proposal for Magnetic Field in...</ShortDesc>
  <Tags>magnet</Tags>
  <IdeaNumber>QUOTE00004</IdeaNumber>
  <Type>Quote</Type>
  <Status>Pending</Status>
  <DateCreated>2011-02-24T20:59:49-0800</DateCreated>
  <DateModified>2011-02-24T21:03:55-0800</DateModified>
  <CreatedBy>Admin CNM</CreatedBy>
  <ModifiedBy>Admin CNM</ModifiedBy>
</Attributes>
- <Reference>
- <Row>
  <Fulfillment>0</Fulfillment>
  <ObjectKey>2_-1_10000_6099226</ObjectKey>
  <FileId>0</FileId>
  <DateModified>2011-02-24T21:01:38-0800</DateModified>
  <ModifiedBy>Admin CNM</ModifiedBy>
  <SourceId>2</SourceId>
  <RefDesc>Grace 10/25 - - new database on scd34060 demo931oas, demo931rmwowner, demo931rmwuser - add attachment and view work fine</RefDesc>
  <RefNumber>P00001</RefNumber>
  <ParentId>10294</ParentId>
  <RefId>10307</RefId>
  <Type>Item</Type>
</Row>
- <Row>
  <Fulfillment>0</Fulfillment>
  <ObjectKey>http://www.bestever.com</ObjectKey>
  <FileId>0</FileId>
  <DateModified>2011-02-24T21:00:25-0800</DateModified>
  <ModifiedBy>Admin CNM</ModifiedBy>
  <SourceId>-1</SourceId>
  <RefNumber>http://www.bestever.com</RefNumber>
  <ParentId>10294</ParentId>
  <RefId>10300</RefId>
  <Type>URL</Type>
</Row>
```

## Importing Objects into CNM

As mentioned in [Supported Operations and File Formats](#) on page 47, in addition to importing exported objects, you can also import a number of objects directly into CNM from Microsoft Excel worksheets.

Information provided in the following paragraphs lists the importable and modifiable attributes and those that are neither importable/modifiable and shows how to:

- Modify and import an exported CNM object
- Import objects that do not exist in the system from an Microsoft Excel worksheet

## Modifying Attribute Values

You can modify and update values for all attributes except for the read-only (system) attributes.

You cannot update the following fields using Import:

- **Object Number**

- **Type**
- **Owner**
- **Date Created**
- **Date Modified**
- **Created By**
- **Modified By**

You can import values for attributes that are not system attributes and are enabled and modifiable for the specific object type. Make sure column headings are worded exactly as they appear in CNM, and a column identifying type is present. In these instances, Oracle recommends using a sample output file as a template. Other out-of-the-box fields on **Cover Page** and enabled flex fields can be updated using the Import process. When importing **Date** fields, the required format for the entry is the following: MM/DD/YYYY.

## Importing Modified Objects

The following Import procedure creates and locates an object that has its Idea, Requirement, and Quote components. The object is exported to Excel and after some modifications it is imported and viewed in CNM.

**Important** If you plan to import a modified exported object, Oracle recommends enabling the necessary attributes and creating the Idea, Requirement, Quote types in CNM prior to export. This preparatory task will simplify updating the applicable attributes in the Excel workshop.

### Create, update, and import a Requirement Type object for an exported Idea object:

1. In CNM, create the following Requirement object for the *Modern Sailboat* Idea exported in Exporting to Excel Workshops.

The screenshot shows a 'Requirement' form with the following fields and values:

- Requirement Name:** Reefing main and jib
- Tags:** boat
- Object Number:** REQ01676
- Type:** Requirement
- Status:** Pending (dropdown menu)
- Estimated Cost:** 7000
- % Complete:** 0
- Special Comments:** In Boom Reefing
- Date Created:** 16-Jan-2010 01:44 PM

2. In CNM, select and export the Requirement for this object and then open the file in Excel.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Name	Description	Tags	Object Num	Type	Requ	Status	Target Cor	Mandator	Owner	Requirement	Estimated	% Comple	Special Cc	Date Creat	Date Modif	Created By
2	Requirement	Reefing m	boat	REQ01676	Requirement	Pending					Other	7000	0	In Boom R	16-Jan-2010	08-Feb-20	Admin CNI

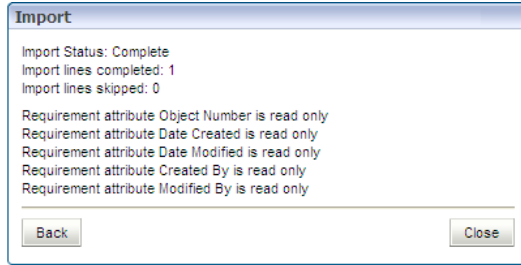
3. Modify the attributes as shown in the bold font faces.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Name	Description	Tags	Object Number	Type	Requirement Status	Target Completion Date	Mandatory	Owner	Requirement	Estimated Cost	% Complete	Special Comments	Created Date	Modified Date	Created By	Modified By
2	Requirement	Reefing main and jib		REQ01676	Requirement	Pending	3/10/2010			Other	7500	25	In Boom Reefing	16-Jan-2010 01:44 PM	08-Feb-2010 03:19 PM	Admin CNM	Admin CNM




4. In CNM, select **Tools > Import**.



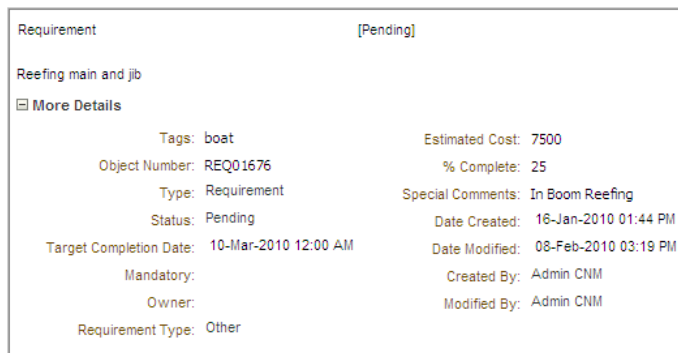
The **Import** window displaying status, the number of lines and attributes, and any errors it encountered during the Import process appears. If you press the **Back** button, the window reverts to the one shown in Step 4 above, enabling you to re-import, or import another workshop. As indicated earlier, Import will lose the **Level** attribute. This is not applicable here because the object you are importing is a flat structure.



5. In CNM, use object number (REQ01676) to locate the updated object.

Search Result							
View   							
		All		All			
Name	Number	Type	Description	Status	Tag	Created By	Date Created
Requirement	REQ00001	Requirement	Reefing main and jib	Pending	boat	Admin CNM (admin)	02/24/2011 09:5

6. In CNM, open the object and note the attributes you updated in Excel (**Estimated Cost**, **% Complete**, and **Target Completion Date**).



## Importing Directly from Excel Worksheets

This feature of the Import process enables creating objects that do not exist in the system. The required access levels, mandatory and optional attributes, and the necessary procedures appear in this section.

### Required Access Level (Privileges)

Because importing objects directly into the system creates new objects, only users with a “Participant” or higher role can perform this operation. This is the same access level required for users of the Create function.

### Required Attribute Values

To import data directly from a Microsoft Excel worksheet, you must specify values for the following attributes. Otherwise, the object is not imported

- **Object Type**
- **Object Name**
- **Object Status**

---

**Note** Because the Import process creates a new object for each row of the Excel worksheet, it is necessary to provide these values for each row of the Excel worksheet. See Examples

---

### Optional Attribute Values

When creating objects using Import, you can assign values to any enabled and modifiable field, such as the **Description** field. Do not specify a value for the **Object Number** attribute. The **Object Number** value is specified only if you are trying to update an existing object where specifying the **Object Number** value is mandatory. CNM's Import process assigns values for the **Object Number** attribute for each imported object.

---

**Note** To facilitate locating objects created using Import in CNM, use values specified in the Excel file for attributes such as Tag, Name, or other modifiable fields as search keys.

---

### Examples

The following example describes the process from the initial creation of the Excel worksheet through specifying the mandatory attribute values, creating objects using Import, and searching and viewing the imported objects in CNM. The example assumes one of the modifiable fields called *Value* is enabled for the Idea object.

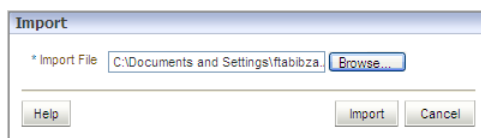
**Important** Depending on the type of objects that you want to import, you must include different number of object header rows. For example, if the import file contains the Idea and Quote object types, then you must add two header rows with the corresponding field names for Idea and Quote objects. The example below is adding the Requirement type also.

**To create the worksheet and set the mandatory attributes:**

- In an Excel worksheet, do as follows:
  - Type the values shown in rows 1 - 6 of columns A and B to assign the mandatory values respectively. Set the values shown in the columns C, D, E, and F of rows 1, 2, and 3 (this is optional).
  - In rows 4, 5, and 6 of columns A and B, specify the values shown below for the mandatory fields. Set the values shown in the remaining columns C, D, E, and F of rows 4, 5, and 6 (this is optional).

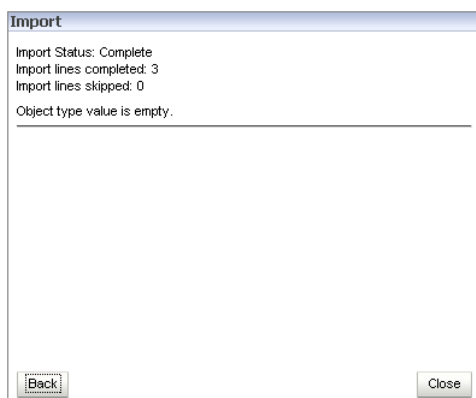
	A	B	C	D	E	F
1	Type:Idea	Name	Description	Status	Tags	Value
2	Type:Requirement	Name	Description	Status	Tags	
3	Type:Quote	Name	Description	Status	Tags	
4	Idea	Build a boat	Multihull racer	Pending	Boat	Gold Medal
5	Requirement	Speed	20 Knots	Pending	Boat	
6	Quote	\$stimate	\$5000K	Pending	Boat	

- In CNM, select **Tools > Import > Browse** to open the worksheet.



- In Import dialog, select **Import**.

The Import dialog displays the import status. Assigned values for the three rows are imported.



- In CNM, use Idea object's Name or Description to locate the imported object.

**Note** In addition to the mandatory attributes, optional values such as Tags, Status, and "Gold Medal" which was set for the enabled attribute called *Value* is also imported.

---

The screenshot shows a 'Summary' window with a title bar containing a minus icon and a pencil icon. The main content area displays the following information:

- Title:** Build a boat
- Status:** [Pending]
- Category:** Multihull racer
- More Details:**
  - Tags:** boat
  - Object Number:** IDEA00652
  - Type:** Idea
  - Status:** Pending
  - Approver:**
  - List01:**
  - Text01(Idea):**
  - Value:** Gold Medal
  - Date Created:** 16-Feb-2010 03:52 PM
  - Date Modified:** 16-Feb-2010 03:52 PM
  - Created By:** Admin CNM
  - Modified By:** Admin CNM

# Administration

**This Appendix includes the following:**

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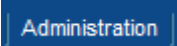
▪ CNM Administration .....	59
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## CNM Administration

This Customer Needs Management (CNM) Administration section is the primary resource for CNM administrators. There is information regarding defining CNM objects and their attributes, setting up users and user groups, and establishing system settings for CNM.

### Administrative Capabilities

Administrators can customize the behavior of each object type using the configurable options provided for each object type. There is a specific process to create users in CNM. For more information, see the CNM *Implementation Guide*. Once a user is created that has the Administrator role, more users can be created by accessing the Administration section.

After successfully logging in as an administrator user, access the **Administration** section by clicking  in the top right corner of the **Home Page**. You are directed to the **Administration** section that has the following:

- **Objects and Attributes** — define and manage object types, attributes, and properties
- **Lists** — define and manage list values
- **Users** — create, modify, and disable users
- **User Groups** — create, modify, and delete user groups
- **Keyword Library** — create and view keywords that associate CNM objects to one another
- **System Settings** — configure and establish system settings that impact search, attachments, sending objects, references, and more

**Important** Agile CNM supports seven languages in addition to English. If the administrator makes a change in one language, that change needs to be performed in the other languages as well to ensure that across all language preferences for users there is a reflection of the same system changes. After any change is made, all administrators need to login with other language preferences and make the necessary corresponding changes.

## Objects and Attributes

From **Objects and Attributes**, you can define and manage object types along with their properties and attributes. Each object type can have a different set of attributes. Specific attributes are common to all object types while others can be modified, enabled, configured, or removed.

**Important** You cannot delete a default, pre-defined object type. You can only adjust and change the properties and attributes of the object type to reflect what you require.

The following table lists the default object types in CNM:

Object Type	Prefix	Description
Quote	QUOTE	A vendor's statement of products and services offered to a potential customer
Idea	IDEA	A suggestion for a product, process, or service
Requirement	REQ	A set of conditions or necessary specifications for a product

Adjust these object type definitions as needed for your desired business processes and nomenclature.

## Defining Properties

All of the available properties of an object are editable. You can configure any object type to help accommodate your business process needs. The following table contains the configurable object type properties:



Object Property	Data Type	Property Values	Description
Name	Text	Idea, Quote, or Requirement	The configurable object types for CNM
Description	Text	TBD	A text string the administrator enters
Enabled	List	Yes or No	Allows or limits the user creating and searching for specific object types in CNM. If set to No, the associated object type cannot be searched for or created. This includes quick searches, advanced searches, adding by search from Explorer, and Tag cloud searches.

Default Team	List	TBD	User groups that are assigned to an object type and are therefore automatically assigned as team members for any object created that is of that object type
Prefix	Text	TBD	A text string the administrator enters that becomes the prefix for the object number autogenerated by CNM

The required fields, which may not be left blank, are designated by an (\*) before the field name.

## Editing Object Properties

To edit the properties of an object type:

1. From **Objects and Attributes** click the **Object Type** dropdown menu to choose which object type you want to edit.
2. Once you have selected the object type click  on the **Properties** tab.
3. Now all the available fields are in edit mode and you can change the fields to the values you want.
4. Click  when you are finished.

## Object Attributes

The following are the various data types for attributes:

- **Text** — contains any valid character from the keyboard
 

**Note** The **Display Height** property determines if the text attribute is a single line text field or a multi-line text field. For more information, see [Attribute Properties](#) on page 63.
- **Number** — contains positive or negative numbers, the decimal (.), comma (,) and the hyphen to indicate a negative number (-) value
- **List** — contain values the administrator configures or sets as default values for such attributes
- **Date** — a date selected from a calendar or entered directly by the user

The default configuration for the attributes of objects is found in the table below:

Attribute Name	Display Name	Modifiable	Data Type	Visible	Description
ID	ID	No	Number	No	A unique identifier autogenerated by the CNM system
ShortDesc	Name	Yes	Text	Yes	An identity for the object
Description	Description	Yes	Text	Yes	More information about an object



Attribute Name	Display Name	Modifiable	Data Type	Visible	Description
Tags	Tags	Yes	Text	Yes	A keyword identifier to categorize objects together
IdeaNumber	Object Number	No	Text	Yes	An autogenerated number
Type	Type	Yes	List	Yes	Classifications for each object type created by the administrator to accurately reflect the processes in CNM
Status	Status	Yes	List	Yes	Determined states for objects that reflect the progress of the objects implementation. Default values are: Pending, Review, Approved, and Rejected
Owner	Owner	No	Number	No	The user who created the object
Deleted	Deleted	No	Number	No	--
ObjVersion	Obj Version	Yes	Number	No	The version number of the object type
Date01-Date15	TBD	No	Date	No	Administrator determines this attribute according to the CNM process needs for the users
List01-List15	TBD	No	List	No	Administrator determines this attribute according to the CNM process needs for the users
Number01-Number15	TBD	No	Number	No	Administrator determines this attribute according to the CNM process needs for the users
Text01-Text15	TBD	No	Text	No	Administrator determines this attribute according to the CNM process needs for the users
DateCreated	Date Created	No	Date	Yes	The date and time the object was created
DateModified	Date Modified	Yes	Date	Yes	The date and time the object was last modified
CreatedBy	Created By	No	List	Yes	The first and last name of the user that created the object

Attribute Name	Display Name	Modifiable	Data Type	Visible	Description
ModifiedBy	Modified By	Yes	List	Yes	The first and last name of the user that last modified the object
RichText	Rich Text	Yes	Rich Text	No	Formatted text entered by the user rendered through ADF

**Important** Only fifteen flex attributes for each data type are allowed for each object type.

## Editing Object Attributes

To edit the attributes of an object type:

1. From **Objects and Attributes** go to the **Attributes** tab.
2. In the table display of available attributes click the attribute you want to edit.
3. Below is the **Attribute Properties** section where you click  and the attribute property fields become editable.
4. When you are finished click .

## Attribute Properties

The available properties for attributes are found in the table below:

Property	Available on Attributes	Data Type
Attribute ID	Date, List, Number, Text	Number
Attribute Name	Date, List, Number, Text	Text
Display Name	Date, List, Number, Text	Text
Description	Date, List, Number, Text	Text
Visible	Date, List, Number, Text	List
Modifiable	Date, List, Number, Text	List
Data Type	Date, List, Number, Text	Text
Display Type	Date, List, Number, Text	List
Display Order	Date, List, Number, Text	Number
Default Value	Date, List, Number, Text	Text
Help Text	Date, List, Number, Text	Text
List Name	List	List
Display Height	Text	Text

## Lists

From **Lists**, you can define and manage list values made available on specific object types. Please note that when you disable some list values, on attributes assigned to those lists, the disabled values show up the text (disabled) after the value in the list dropdown. This applies to all lists including the users list.


### List Properties


The following are the properties of lists:

- **ID** — a unique identifier autogenerated by the CNM system
- **Name** — field you can edit to reflect the name of the list being created
- **Enabled** — dropdown menu of Yes or No options to determine if the created list is enabled
- **Description** — area available for more details about the created list
- **Type** — designating the type of list as a Text or Image

### Creating Lists

To create a list:

1. From **Administration** go to **Lists** and click .
2. In the **Properties** tab enter a **Name** for the list you are creating.



**Note** List names are not case sensitive and must be unique.
3. Set the **Enabled** field to Yes or No and enter text into the **Description** field if needed.
4. Click  to finish.



### List Values

The **List Values** tab is where you add list values to an already existing list entry. The **Entry ID** number is autogenerated, but you need to enter names for each list value you create and determine if it is enabled or disabled.

### Creating list values



To create a list value:

1. Go to the **List Values** tab.
2. Click  and enter a name for this list item in the **Entry Value** field.
3. Set the **Enabled** field to Yes or No.
4. Click .



5. You can click  to continue creating entries.
6. Click  when you are finished.

## Modifying Lists

### To modify the properties of a list:

1. From **Lists** go to the **Properties** tab and click .
2. Enter in your new values for the **Name**, **Enabled**, and **Description** editable fields.
3. Click  to finish.

### To modify the list values of a list:

1. From **Lists** go to the **List Values** tab.
2. In the **Entry Value** and **Enabled** columns make any changes needed.
3. If the changes made are incorrect click  to begin making changes again.
4. Click  to finish.

## Status List

Each object type has a **Status** list of values associated with it. This **Status** list is essential in the management of the lifecycle of an object within CNM. As an administrator you designate the number of statuses that are active for each object type, the icon associated with each status, the name of each status, font color of the status title, the creation of additional statuses or the disabling of a status that is no longer needed.

### To edit Status list properties for a specific object type:

1. Go to **Administration > Lists > Status List > Properties** tab.
2. Click **Edit**.
3. Change values for **Name**, **Description**, and set the **Enabled** dropdown to **Yes** or **No**. The **Type** value is by default an Image.
4. Click **Save**.

### To edit Status list values for a specific object type:

1. Go to **Administration > Lists > Status List > List Values** tab.
2. You can edit the current values of existing Statuses or click **Create**.
3. Enter values for the **Entry Value** and set the **Enabled** dropdown to **Yes** or **No**.
4. Next add an **Icon** and select a **Font Color**.
5. Click **Save**.

## Users

From **Users**, you can configure the following aspects of users in CNM:

- Create and add new users
- Modify user properties such as email, roles, etc.
- Disable existing users

## User Properties

The user object in CNM has the following properties:

Property	Modifiable	Description
User ID	No	The user's sign on name. This property is required to be unique for each user. <b>Note</b> If your CNM system is integrated with an Agile PLM system, the PLM system validates the User ID (username) so do not change your CNM User ID (username).
Status	Yes	A dropdown list with these two options: Enabled or Disabled
First Name	Yes	A text field to enter in a user's first name
Last Name	Yes	A text field to enter in a user's last name
Email	Yes	A text field to enter in a user's email address
Role	Yes	A dropdown list with the following default options: Viewer, Participant or Administrator <b>Note</b> If you have configured the Roles to different names, those will appear as the options for the user properties
Number Format	Yes	A dropdown list providing formats for the display of your numbers
Time Format	Yes	A dropdown list providing formats for the display of your current time in Hours, Minutes and Seconds
Time Zone	Yes	A dropdown list providing global selections for your current time zone
Date Format	Yes	A dropdown list providing formats for the display of your current time date in Years, Months and Days
Language	Yes	A dropdown list with the following default options: English, French, German, Japanese, Korean, Russian, Simplified Chinese and Traditional Chinese

## User Roles

User roles provide a level of security in CNM. The role assigned to a user determines the actions that the user can carry out on accessible objects.

**Viewer** — can only perform View, Approve, Reject, Add Notes, Add Comments, Send, View History, View Where Used, and Add to Favorites actions on the objects that he/she has access to.


**Participant** — can perform all object transaction actions such as Create, Delete, Modify, Save As, Send, Comment, Tag, Import, Export, along with all the actions available to the Viewer role on the objects that he/she has access to. A Participant does not have access to any of the Administrator features.

**Administrator** — can perform all the object actions available in the product that he/she has access to. The Administrator can also perform all the actions defined in the **Administration** section such as defining object attributes, adding lists, creating users and user groups, and establishing system settings.

### Adding a User

Once you have gathered information about new users and assessed their access requirements, add them to the CNM system. The User ID needs to be unique, and if the administrator chooses an already existing User ID the system will notify the administrator with an error message.


#### To create a new user:

1. From **Administration** choose **Users**.
2. Click  to open the Create User window.
3. Type the **Username**, **First Name**, and **Last Name** in the required fields.
4. Enter a value for the optional field **Email**.
5. Choose Viewer, Participant, or Administrator from the dropdown list of available roles.
6. Click **Create**. The **Settings** tab of the newly created user appears in the bottom pane of the workspace already in Edit mode.
7. You can then adjust the editable fields of **Status**, **First Name**, **Last Name**, **Email**, and **Role**.

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
**Note** The User ID is an uneditable field.

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8. Click  to finish.

### Editing a User's Properties


#### To edit a user's properties:

1. From **Administration** choose **Users**.
2. Click the User ID of the user you want to edit.
3. From the **Properties** tab of the user click .
4. You can then adjust the editable fields of **Status**, **First Name**, **Last Name**, **Email**, and **Role**.

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

**Note** The User ID is an uneditable field.

---

5. Click  to finish.

### ***Disabling a User***

#### **To disable a user:**

1. From **Administration** choose **Users**.
2. Click the User ID of the user you want to disable.
3. From the **Properties** tab of the user click .
4. Change the **Status** field from Enabled to Disabled.
5. Click  to confirm and finish.

When a user is disabled they no longer have access to the CNM application. The team membership that they have associated to their user is still valid, but if another user is searching for users to add to a team, to send an object to, or to make part of a user group, CNM does not display the disabled users in the search results.

If you disable a user that is a member of any user group, CNM notifies you that the user groups the user is a member of are removed from that user. However, when you re-enable the user, CNM notifies you that the user groups previously associated with the user return to the user and he/she is once again part of the user group membership.

## **User Groups**

From **User Groups**, you can configure the following aspects of user groups in CNM:

- Create and add new user groups
- Modify user group properties such as name, description, members, etc.
- Delete existing user groups

## **User Group Properties**

The properties of a user group are **Name** and **Description**. A name is required and both are editable.


### **Members**

The **Members** tab of a user group is where you can search for existing CNM users and add them to a user group.



### ***Adding a User Group***

#### **To create a new user group:**

1. From **Administration** choose **User Groups**.



2. Click . The **Create User Group** window opens.
3. Enter values for **Name** and **Description**.
4. Click **Create** to finish.

#### To add members to a user group:

1. Go to the **Members** tab of the newly created user group found in the bottom pane of the workspace.
2. To find users to add to the user group click .
3. From the **Add Members** window search for existing users.
4. Once you have selected the desired user(s) click  to finish.



#### Editing a User Group's Properties

##### To edit a user group's properties:

1. From **Administration** choose **User Groups**.
2. Click the name of the user group you want to edit.
3. From the **Properties** tab of the user group click .
4. You can then adjust the editable fields of **Name** and **Description**.
5. When you are finished with your changes click .

#### Deleting a User Group

##### To delete a user group:

1. From **Administration** choose **User Groups**.
2. Click the name of the user group you want to delete.
3. Click . There is a prompt asking you, "*Do you want to delete the selected user group?*"
4. Click  to confirm the deletion.

Once a user group is deleted, the group is also removed as a team for any object that has it assigned as a team member.

## Keyword Library

From the **Keyword Library** the administrator can create and view keywords that correlate objects to one another in CNM.

## Keyword Entry and Removal


### To create a keyword:

1. Go to **Administration > Keyword Library**.
2. Click **Create**.
3. In the **Create New Keyword(s)** window enter text for the name(s) you want to create, up to 150 characters. You can enter more than one keyword at a time by clicking Enter on your keyboard to separate entries.



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**Note** Any duplicates entered are ignored by CNM. Keywords are displayed how the user entered them, but they are treated as case insensitive.

---

4. When finished, click .

### To delete a keyword:

1. Go to **Administration > Keyword Library**.
2. Find the existing keyword you want to remove and click the .
3. In the **Confirmation** window it reads, "*Do you want to delete the selected keyword?*"
4. Click  to finish.

## Keyword Generation

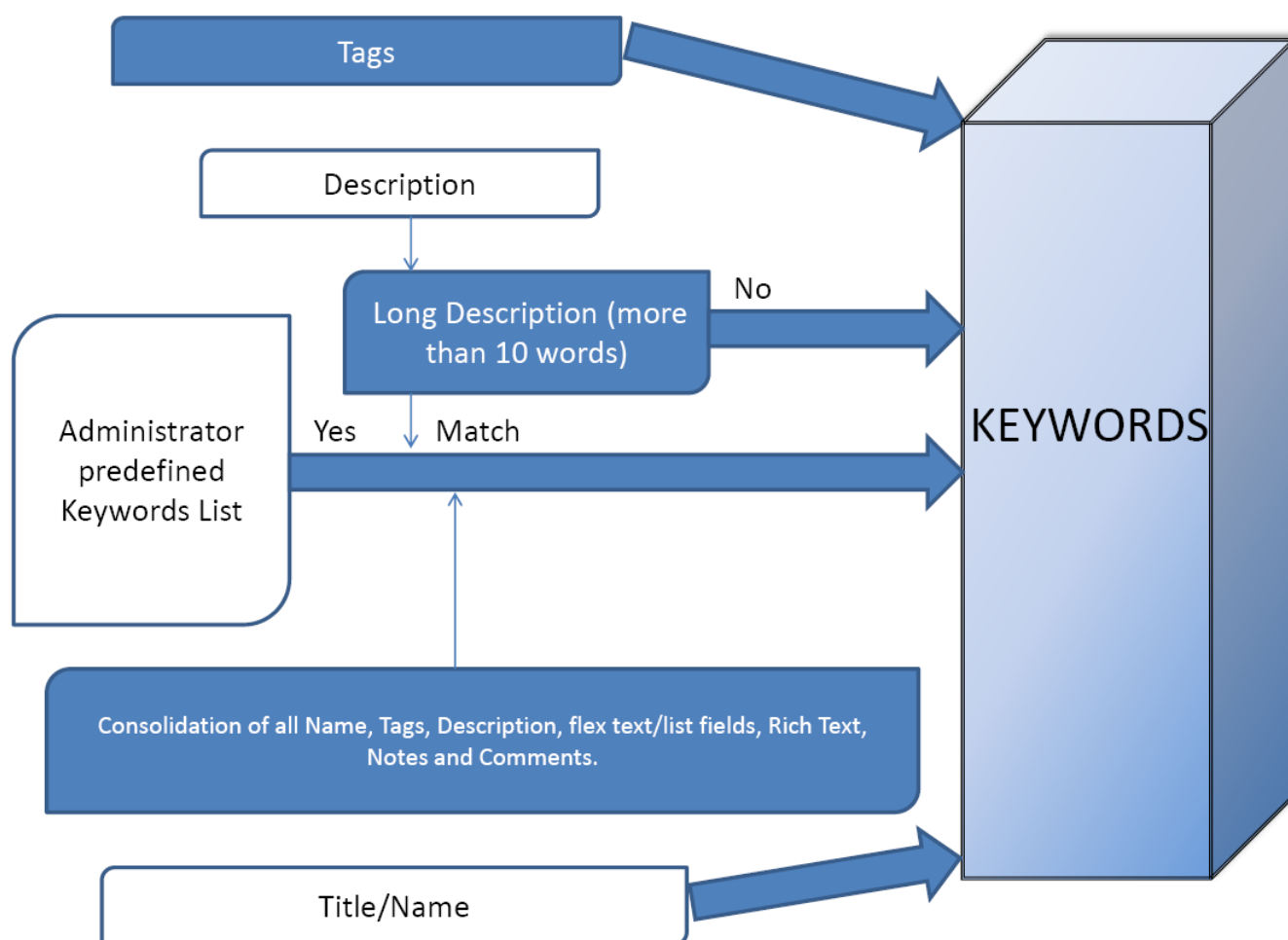
The following areas are used to generate keywords for an object when there are no predefined keywords entered by an administrator in the **Keyword Library**:

- All the words in the object **Name**
- All the tags associated with the object
- All the words from **Description**, if the description is less than 10 words

If there are predefined keywords entered by an administrator in the **Keyword Library**, then in addition to the above mentioned three areas, all the words from the following areas are tallied against the keywords in the **Keyword Library**:

- Object **Name**
- **Tags**
- **Description**
- All text, rich text and list flex fields
- **Notes and Comments**


All the matches will be added to the keywords for an object. This process is illustrated in the diagram below.



**Note** Stopwords are excluded from the keyword list and similar object search analysis. For a list of stopwords as defined by Oracle, see [http://download.oracle.com/docs/cd/B28359\\_01/text.111/b28304/astopsup.htm#CEGBGCDF](http://download.oracle.com/docs/cd/B28359_01/text.111/b28304/astopsup.htm#CEGBGCDF)  
[http://download.oracle.com/docs/cd/B28359\\_01/text.111/b28304/astopsup.htm#CEGBGCDF](http://download.oracle.com/docs/cd/B28359_01/text.111/b28304/astopsup.htm#CEGBGCDF).

Once the keywords of an object are generated, the set of keywords is used to run a Full Text Search across all the objects in the system. The Full Text Search returns the matching score for all the objects in CNM. The top five objects with the highest percentages of association display in the **See Also...** section of that current object. For more information see [Leveraging the See Also...](#).

## System Settings

From **System Settings**, you can modify the previously configured CNM system settings. If you begin entering changes that you do not want to keep, click  to remove all the unsaved changes for each setting. Any changes made to the system settings go into effect for users who log in after those changes have been applied by the Administrator, and therefore do not reflect in any user sessions that are concurrently running while the changes are made. In order to see changes made by the Administrator, users should log out from their current session and log back in.

**Important** It is strongly recommended that you restart your application server after making and saving changes to the **System Settings** of CNM in order for all the changes to be implemented.

## Establishing System Settings

The following fields are configured for your CNM system settings after installation:

Name	Description	Modifiable	Values
Schema Version	Schema Version	No	1.1.0.xx
Authentication Provider	Authentication Provider	No	Agile PLM or LDAP
Mail Server	Mail Server	Yes	<a href="http://mail.your-company-name.com">http://mail.your-company-name.com</a>
Mail Server Port	Mail Server Port	Yes	25
Web Client URL	Web Client URL	Yes	<a href="http://cnm-link:port/acnm">http://cnm-link:port/acnm</a>
Search in Attachment	Search in Attachment	Yes	Yes or No
*Viewer URL	Viewer URL	Yes	<a href="http://ucm-web-client:port/virtual/path/idc/jsp/autovue/csiApplet.jsp">http://ucm-web-client:port/virtual/path/idc/jsp/autovue/csiApplet.jsp</a>
*UCM Administrator	UCM Administrator	Yes	XXXX
*UCM Administrator Password	UCM Administrator Password	Yes	*****
CNM Home Directory	CNM Home Directory	Yes	X:\xxxx\yyyy\zzzz
Online Help URL	Online Help URL	Yes	<a href="http://&lt;upkhost&gt;/agilecnm/hemi/agilecnm_gateway.html">http://&lt;upkhost&gt;/agilecnm/hemi/agilecnm_gateway.html</a>
File Server Type	File Server Type	No	Agile PLM File Server or UCM
File Folder Subclass	File Folder Subclass	Yes	Dropdown menu of currently enabled file folder subclass types available in Agile PLM

Name	Description	Modifiable	Values
Agile PLM Server URL	Agile PLM Server URL	No	<a href="http://your-agile-plm-server:port/virtual-path">http://your-agile-plm-server:port/virtual-path</a>
Agile PLM SSO Server URL	Agile PLM SSO Server URL	Yes	<a href="http://your-agile-plm-SSO-server:port/virtual-path/PLMServlet">http://your-agile-plm-SSO-server:port/virtual-path/PLMServlet</a>

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**Note** The fields with an asterisk (\*) above are not required and these fields will be uneditable when the **File Server Type** is set to Agile PLM because these options are valid only when the file server type is set to UCM file server.

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All of the fields above will have default values, according to prior configuration, once CNM is properly installed. For more information, see *CNM Implementation Guide*.

Some significant CNM behaviors are determined by the values of these system settings.

The **Mail Server** value determines what server host is sending and receiving notifications for CNM users.

The **Web Client URL** value is used to add an object reference to a CNM object's **Attachment** section. The URL is necessary to create a reverse link from the Agile PLM reference object back to the CNM object.

The **Search in Attachment** value determines if the user can search the content of attachments associated with objects. When the setting is **No**, searches are limited to include only attachment names and descriptions.

The **Viewer URL** value is necessary to be able to render a view of an attachment for a UCM file server configuration. If this value is set incorrectly or left blank, the user cannot view any attachment content.

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**Note** Without this value set, a user can still get attachments by saving them locally and then opening them in the native application for the attachment.

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The **File Server Type** value informs the administrator which file server type was configured at the time of installation. The choices of Agile PLM File Server and UCM are available.

The **File Folder Subclass** value displays the file folder subclasses currently available and enabled in Agile PLM. This dropdown list is dynamically produced each time you log in for a user session.

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**Note** If new subclasses are created and enabled in Agile PLM while in a current user session, click **Reset** to refresh the CNM System Settings and the new file folder subclasses are updated.

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When the **File Folder Subclass** property is not defined, the file folder subclasses are deleted or disabled in Agile PLM, then this property is empty and the action to add an attachment in CNM is unavailable. It is recommended that the file folder subclass selection you choose for CNM object attachments be consistent to make it easier to find those file folders and attachments in Agile PLM.

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**Note** The **File Folder Subclass** property is uneditable for UCM configuration.

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The **Online Help URL** value gives a location for users to be directed to documentation. If you have purchased a license for User Productivity Kit (UPK) content for CNM, this URL also directs you to your UPK help topics.

The **Agile PLM SSO Server URL** value validates usernames and passwords for logging in to CNM from Agile PLM when there is an SSO configuration for users.

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**Note** If this value is left blank, CNM will automatically use the Agile PLM Server URL. This server and URL are the recommended setting for this value.

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