Oracle® Agile Product Lifecycle Management for Process

Document Reference Library User Guide

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Oracle Agile Product Lifecycle Management for Process Document Reference Library User Guide, Release 6.1

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Preface

The Oracle *Agile Product Lifecycle Management for Process Document Reference Library User Guide* explains how to use the Document Reference Library (DRL) application as a central repository for storing and sharing key corporate and industry-related documentation. Additionally, you can use DRL to catalog and publish documents both internally and to the Supplier Portal application. You determine who can see and modify a document by setting the association between a document and its catalog.

This Preface contains these topics:

- Audience
- Variability of Installations
- Documentation Accessibility
- Related Documents
- Conventions

Audience

This guide is intended for end users who are responsible for creating and managing information in Oracle Agile Product Lifecycle Management (PLM) for Process. Information about administering the system resides in the *Agile Product Lifecycle Management for Process Administrator User Guide*.

Variability of Installations

Descriptions and illustrations of the Agile PLM for Process user interface included in this manual may not match your installation. The user interface of Agile PLM for Process applications and the features included can vary greatly depending on such variables as:

- Which applications your organization has purchased and installed
- Configuration settings that may turn features off or on
- Customization specific to your organization
- Security settings as they apply to the system and your user account

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Related Documents

For more information, see the following documents in the Oracle Agile Product Lifecycle Management for Process Release 6.1 documentation set:

- *Agile Product Lifecycle Management for Process Administrator User Guide*
- *Agile Product Lifecycle Management for Process Global Specification Management User Guide*
- *Agile Product Lifecycle Management for Process New Product Development User Guide*
- *Agile Product Lifecycle Management for Process eQuestionnaire User Guide*
- *Agile Product Lifecycle Management for Process Supplier Portal User Guide*
- *Agile Product Lifecycle Management for Process Release Notes*. Up-to-date Release Notes and other documentation are posted on Oracle Technology Network (OTN) at this location:

  http://www.oracle.com/technetwork/documentation/agile-085940.html

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Introduction to Document Reference Library

You can use Document Reference Library (DRL) as a central repository for storing and sharing key corporate and industry-related documentation.

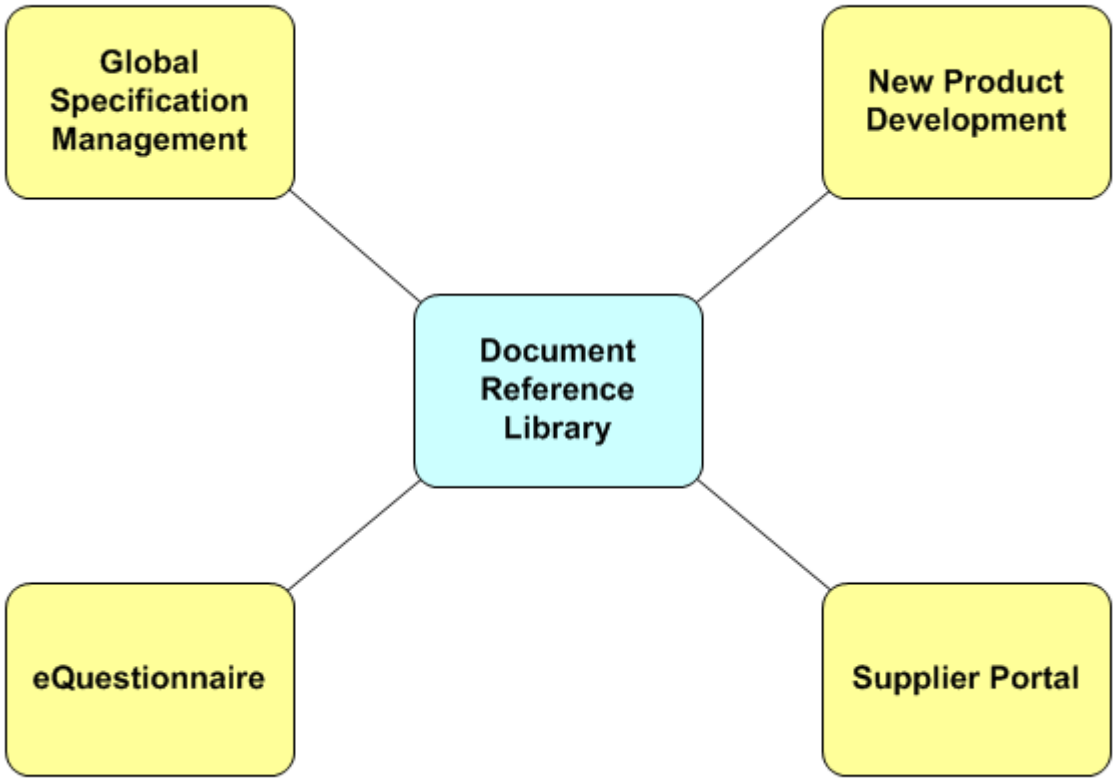
Additionally, you can use DRL to catalog and publish documents both internally and to the Supplier Portal application. You determine who can see and modify a document by setting the association between a document and its catalog.

Use DRL to browse or search the catalog hierarchy using key document attributes such as document name, attachment title, originator, and status.

Touch Points with Other Oracle Agile Applications

As Figure 1–1 shows, DRL is built on an architecture that has enabled it to plug into other Agile PLM for Process products. You can associate DRL documents to many Agile business objects within these products, such as Global Specification Management (GSM) specifications, New Product Development (NPD) projects, and eQuestionnaire (eQ) questionnaires.

Figure 1–1 DRL interacts with several other Agile PLM for Process applications

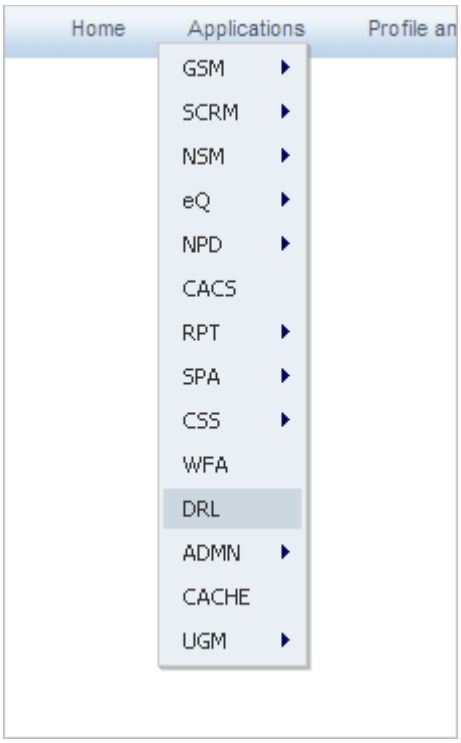


Getting Started with Document Reference Library

To access the Document Reference Library application, select DRL from the left navigation panel as shown in Figure 1–2, or select DRL from the Applications menu of the top menu bar, as shown in Figure 1–3.

Figure 1–2 DRL on the left navigation panel

Figure 1–3 DRL on the Applications menu of the top menu bar



For general information on using Agile PLM for Process software, see the *Agile Product Lifecycle Management for Process Getting Started Guide*.

2

Using Document Reference Library

This chapter presents basic information about using the Document Reference Library application. Topics in this chapter include:

- Document Catalogs
- Document Visibility
- DRL Application
- Creating a New Document
- Viewing a Document
- Creating a Copy of a Document
- Supplier Portal
- Linking to Document Reference Library from Other Applications

Document Catalogs

You can use document catalogs to organize and provide visibility to documents. Administrators create and manage catalogs using the Data Administration (ADMN) application. Administrators can create as many catalogs as needed.

Catalogs consist of a root node with one or more child nodes. Each child node can also contain one or more other child nodes. In this hierarchical structure a node can have one parent and many children.

Once the catalog is defined, you can use it within Document Reference Library (DRL) and other Agile Product Lifecycle Management for Process applications that use DRL. Within the DRL application, if you have the appropriate role (set by your Agile administrator), you can assign documents to one or more catalog nodes, regardless of where that node lives in the hierarchy. See "DRL catalog, global portal (root node)" on page 2-1 and "DRL catalog, supplier portal (root node)" on page 2-2 for examples of two catalogs.

Example 2–1 DRL catalog, global portal (root node)

```
Global Portal (root node)
    North America
        USA
        Canada
        Mexicao
    Europe
        Italy
        France
```

Example 2–2 DRL catalog, supplier portal (root node)

```
Supplier portal (root node)
    North American beef suppliers
        US beef suppliers
        Canadian beef suppliers
        Mexican beef suppliers
    European beef suppliers
        Italian beef suppliers
        French beef suppliers
```

Document Visibility

The ability of a user to view a document is determined by the user's association to a catalog node. Administrators use the User Group Management (UGM) application to define an internal user's association with a catalog node. Document visibility for suppliers is defined in the Supply Chain Relationship Management (SCRM) application on the DRL Catalog tab of a company or facility.

Once your administrator has defined your catalog node associations, you have visibility to all documents associated to catalog nodes beneath your associated node, as well as the documents associated to nodes directly above your associated node all the way to the root node.

For example, if you were associated to the "North America" node in Example 2–1, above, you would have access to all documents in the "USA," "Canada," and "Mexico" nodes as well as any documents in the "global portal" node. You would not have access to the "Europe" node.

DRL Application

In the Document Reference Library (DRL) application, you can view documents by searching and browsing the catalog hierarchy. You can also create and update documents.

Document Access Rights

Your user account must have certain roles, assigned to you in the User Group Management (UGM) application, in order to read, edit, and create DRL documents. Refer to the *Agile Product Lifecycle Management for Process Administrator User Guide*, Appendix A, "System-Based Roles" for a list of roles.

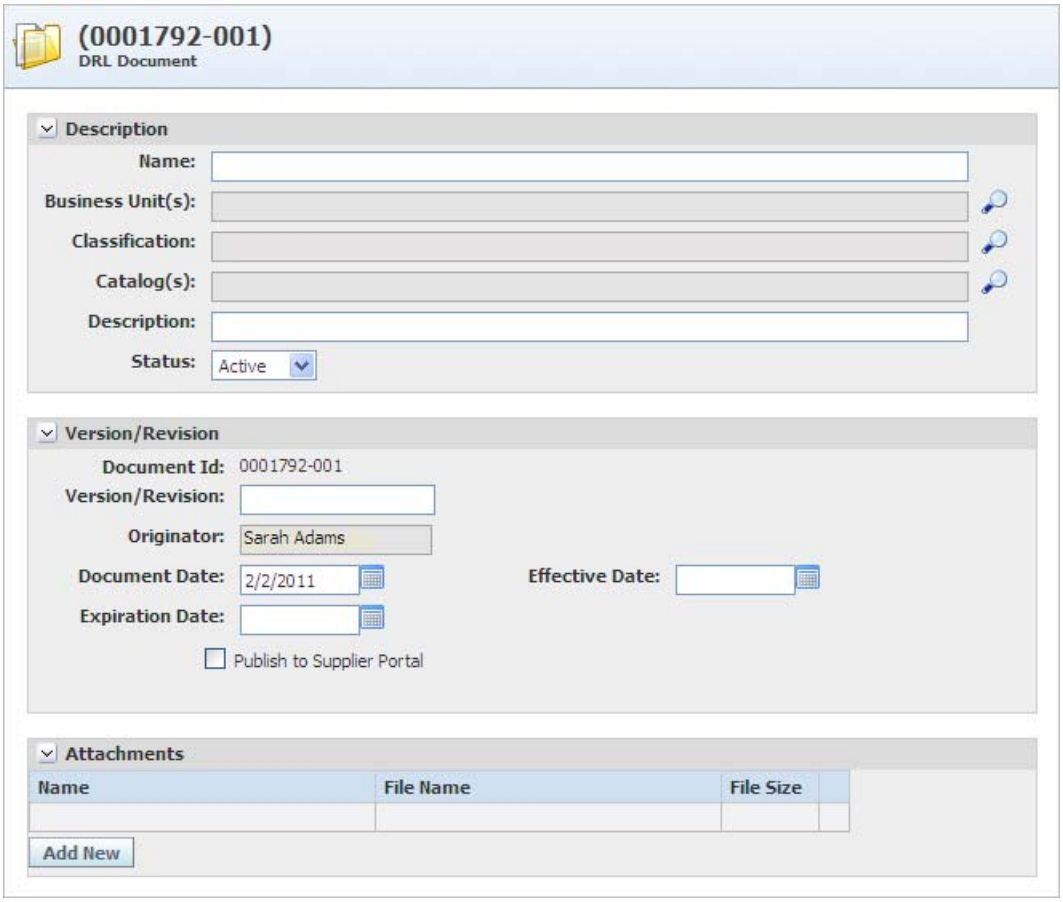
Once these roles have been assigned (by your administrator), you will have access to documents based on the rules defined in "Document Visibility" on page 2-2 of this guide.

Creating a New Document

To create a new document in the DRL application:

1. Click **New** in the action menu. The DRL Document page displays a new document, as Figure 2–1 shows:

Figure 2–1 Document Reference Library page



This page contains three sections:

"Description Section" on page 2-4

"Version/Revision" on page 2-5

"Attachments Section" on page 2-5

2. Complete the sections as described below, and then click **Save** or **Save & Close** to save the document.

Description Section

Use the Description section to provide high-level information about the document.

Fields include:

- **Name**—The title that users will see when viewing the document. This is a required field.
- **Business Unit(s)**—The business unit assigned to the document. This is a required field. Multiple business units can be associated to the document. This does not affect its visibility.
- **Classifications**—The classification of the document. Multiple classifications can be associated to the document. This is for informational purposes only.
- **Catalog(s)**—The catalog the document is assigned to. This is a required field. This will impact its visibility.
- **Description**—You can further describe your document here.
- **Status**—The status of the document. Valid values are "Active" and "Inactive." "Active" is the default. "Inactive" documents will not appear in other applications unless the document is already associated with a business object in that application. Therefore, you cannot associate an "Inactive" document with a specification in Global Specification Management, but if you change the status to "Inactive" after it has been associated to the specification, the inactivated document will remain associated and viewable.

Version/Revision

Use the Version/Revision section to track versions and revisions of the document.

Fields include:

- **Document Id**—The document ID assigned by the system. The first seven digits represent the unique ID of the document. The last three digits represent the version of the document.
- **Version/Revision**—Describe the reason for the revision of the document.
- **Originator**—The name of the user who created the document. This field is assigned by the system and cannot be updated.
- **Document Date**—The created date and/or received date for the document. This field is auto-populated with the current date when the document is created. This field can be edited.
- **Effective Date**—The date the document is effective. This is for informational purposes only; no out-of-the-box system behavior is associated with this field.
- **Expiration Date**—The date the document will expire. This is for informational purposes only; no out-of-the-box system behavior is associated with this field.
- **Publish to Supplier Portal**—Publish the document to the Supplier Portal application. The Supplier Portal user will have to be associated to a company or facility that has access to one of the catalog nodes associated with this document.

Attachments Section

Use the Attachments section to add an attachment to the document. A DRL document may contain one or many file attachments.

An attachment consists of the following data:

Name—The title of the attachment

File Name—The file name of the attached file

File Size—The size of the attached file

> **Note:** There is a limit to the file size that you can upload. This limit varies depending on the system configuration. DRL displays the limit in red at the bottom of the attachment dialog.

Adding an Attachment

To add an attachment:

1. Click **Add New**. The Attachments dialog box displays.
2. Enter the title of the attachment in the **Title** field.
3. Attach the file by clicking **Browse** to search for the file, and then click **Upload**. The name of the file that you added appears in the Attachments table at the top of the page.
4. Click **Done** to close the dialog box, or add more attachments by repeating steps 2 and 3.
5. When you have provided all information for the document, click **Save** in the action menu to save the document to DRL.

Deleting an Attachment

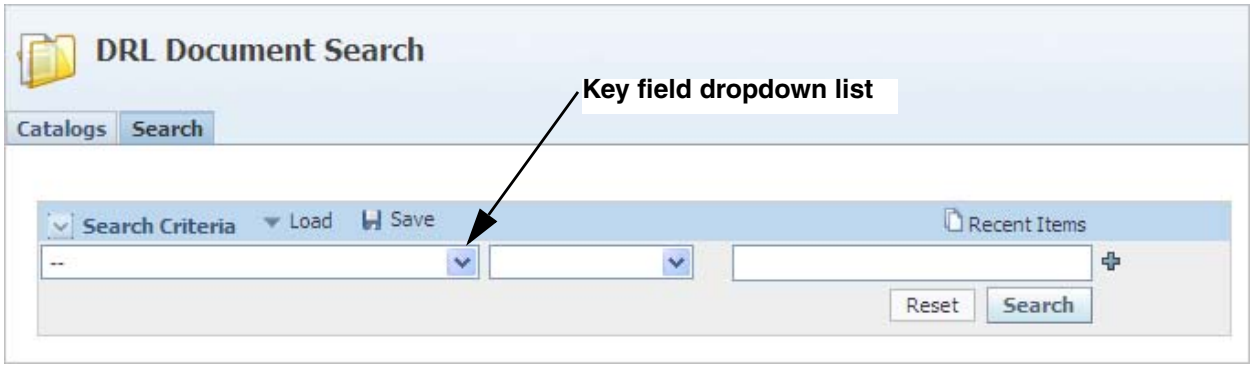
To delete an attachment:

1. From the Document Reference Library page, click **Edit** in the action menu to display the page in edit mode.
2. In the Attachments table, click the delete icon ( ) next to the file to remove. DRL removes the row from the table.
3. Click **Save & Close**.

Viewing a Document

To view a DRL document, click **Open** in the action menu. The DRL Document Search page displays. It contains two tabs, Catalogs and Search, as Figure 2–2 shows.

Figure 2–2 Catalogs and Search tabs



Searching Using the Search Tab

Use the Search tab to search for a document based on certain document attributes, such as document name, classification, or attachment title. Select these attributes from the key field dropdown list, shown in Figure 2–2. The search results will include only documents that you have access to, based on your catalog association. To view a document in a search results list, click anywhere in the row.

Browsing Using the Catalogs Tab

Use the Catalogs tab to browse the catalogs that you have access to. DRL displays the catalogs in a hierarchical format. Each catalog node has an expand node icon ( ) to its left; documents do not. When you select a node, the taxonomy tree displays its children below the node. When you select a document, DRL opens the document.

Creating a Copy of a Document

You can create a copy of a document from within DRL. To create a copy of a document, open the source document to be copied and select **Copy** from the action menu. Document Reference Library displays the Copy Options dialog box containing four options. The two copy options are:

- **Create Copy WITHOUT attachments**—Create a new document with the header information copied but without the attachments.
- **Create Copy WITH attachments**—Create a new document with the header information copied as well as the attachments.

Select one option and then click **Copy**. The Document Reference Library page displays with fields that are populated based on the option that you chose. The Document ID field displays a new, unique number.

Creating a New Issue of a Document

You can create an issue of a document from within DRL. To create an issue of a document, open the source document, and select **Issue #** from the action menu. Document Reference Library displays the Copy Options dialog box containing four options. The two issue options are:

- **Create Issue WITHOUT attachments**—Create a new version of the document with the header information copied but without attachments.
- **Create Issue WITH attachments**—Create a new version of the document with the header information copied as well as the attachments.

Select one option and then click **Copy**. The Document Reference Library page displays with fields that are populated based on the option that you chose. The Document ID field displays a new, unique number.

Supplier Portal

Suppliers who are approved to use Supplier Portal can browse document catalogs. They can also view details of those documents with the Publish to Supplier Portal option selected. For more information about the Supplier Portal, refer to the *Agile Product Lifecycle Management for Process Supplier Portal User Guide*.

Access Rights

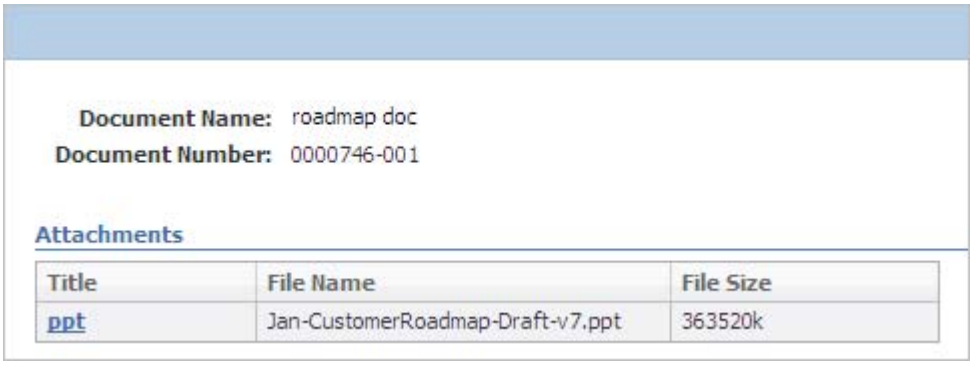
Suppliers can view catalogs based on the catalog nodes that have been assigned to their company and/or facility. This assignment is set within Supply Chain Relationship Management (SCRM) on the DRL Catalog tab of the company or facility profile. For more information on SCRM, refer to the *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide*.

Browsing the Document Catalog

To browse the document catalog from Supplier Portal, select the DRL link from the Home page. You can select a catalog node to expand the node and display its children, as shown in Figure 2–3. Selecting a document will open a dialog box that displays the document name, document number, and attachments table, as shown in Figure 2–4.

Figure 2–3 Expanded node in Supplier Portal

Figure 2–4 Selected document in Supplier Portal

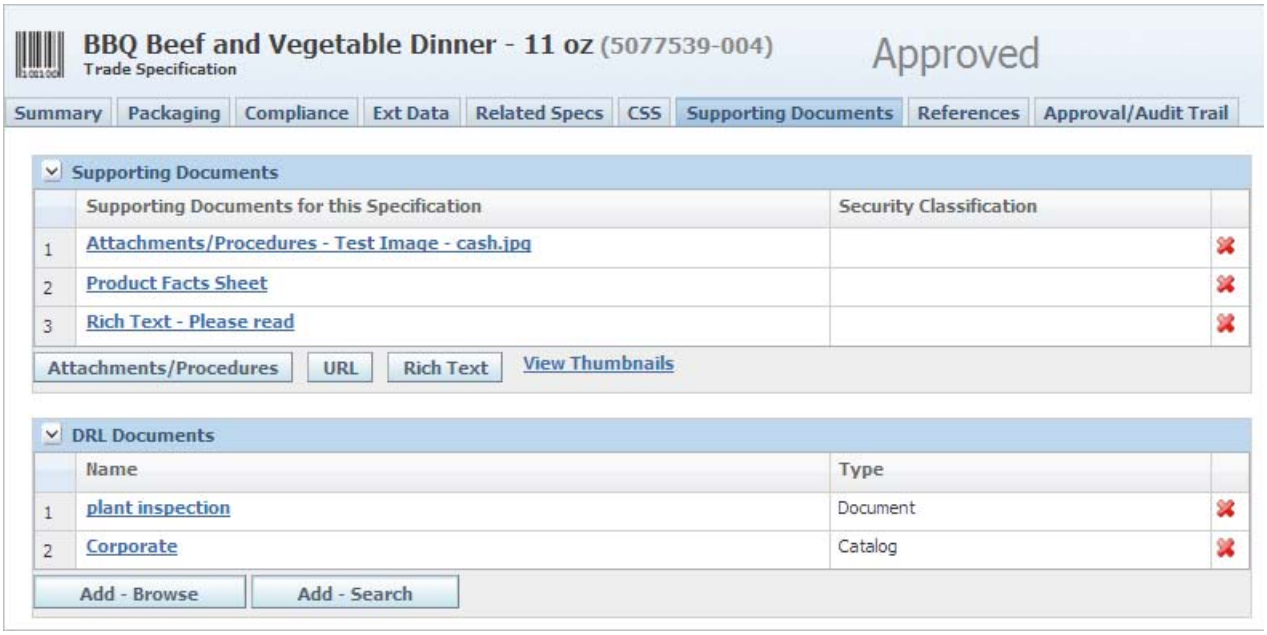


Linking to Document Reference Library from Other Applications

In Global Specification Management (GSM), New Product Development (NPD), and eQuestionnaire (EQ) you can attach DRL documents and catalog nodes to core business objects, such as specifications, projects, and questionnaires. These objects include a DRL Documents section on which you can associate the documents to the respective business object. Figure 2–5 shows the DRL Documents section of a trade specification created in GSM.

The DRL Document table consists of two columns: Name and Type. Name displays the DRL document or catalog name. The Type column identifies the linked DRL item as either document or a catalog. Use the **Add - Browse** button to view documents arranged by catalog in a dialog box , or use the **Add - Search** button to search for documents using a search page.

Figure 2–5 GSM business object



Attaching Documents

When you attach a document to an entity such as a specification, the updates to the document from within DRL will be reflected in the specification. If the document is versioned, the new version will not be associated to the specification.

To associate the new version to the specification, detach the old version of the document and then attach the new version.

Attaching Catalog Nodes

You can associate a catalog node to an entity such as a specification. By associating a node, you can link the entity to many attachments at once. Since catalog nodes are not versioned, any changes to that node will be reflected wherever that node is used.

You may wish to use this feature to ensure that the latest version of a document is attached to a business object. To do this, you must maintain a node with the latest versions and then attach that node to the desired object.

Warning: While using this feature can be an advantage for ease of maintenance, it can also be a risk, because an approved specification can have its associated documents unexpectedly change.

Access Rights

All users see the same entries in the DRL Documents section regardless of access rights. Once you click a catalog or document, the system checks your access rights. If you do not have access, you will receive a message notifying you that you cannot access the document or catalog.

If you have access to the catalog that you click, you can view all documents and child catalog nodes. If you have access only to child catalog nodes within the catalog that you click, your view will be limited to what you have access to.