

Agile Product Lifecycle Management

What's New in Agile PLM 9.3.6

Release 9.3.6

F17315-02

November 2022

This document addresses new capabilities added in Agile PLM 9.3.6 as compared to prior Agile PLM releases. As with the last releases, there are detailed Transfer of Information (TOI) recordings accessed through My Oracle Support that cover all of these features.

Note: This document is a supplement to the release Readme and all other manuals, like the Capacity Planning Guide. It is intended to be an overview of the other documentation and does not replace the need to read and understand those documents. Errors contained in this document are not commitments to provide features.

1 Agile PLM Training and Educational Resources provided by Oracle

Oracle offers extensive training and documentation for customers to learn about Agile PLM 9.3.6. Below is a list of resources:

- ⌘ Installation software is available as a download from Oracle Software Delivery Cloud:
<http://edelivery.oracle.com/>
- ⌘ New versions of Automated Upgrade Tool (AUT) and Averify are published to My Oracle Support. Patch numbers will be available on the Resource Summary Blog Post:
https://blogs.oracle.com/PLM/entry/agile_plm_resources_know_agile
- ⌘ Agile PLM Documentation Page at Oracle Technology Network (OTN):
<http://www.oracle.com/technetwork/documentation/agile-085940.html>
- ⌘ Samples for Agile PLM 9.3.3 are added to the new Sample Code website
 - <http://www.oracle.com/technetwork/indexes/samplecode/agileplm-sample-520945.html>
- ⌘ Transfer of Information Recordings available through My Oracle Support:
 - <https://support.oracle.com/>

Note: These are recording of Agile PLM Product Managers discussing the major new features each release. They are available to any customer with licenses and support for Agile PLM.

- ⌘ 9.3.6 recordings are available through Support Note 2220238.1
- ⌘ 9.3.5 recordings are available through Support Note 2090862.1
- ⌘ 9.3.4 recordings are available through Support Note 1962485.1

- ? 9.3.3 recordings are available through Support Note 1589164.1
- ? 9.3.2 recordings are available through Support Note 1512952.1
- ? 9.3.1 recordings are available through Support Note 1220374.1
- ? 9.3.0 recordings are available through Support Note 854537.1
- ? Agile PLM blog: <http://blogs.oracle.com/PLM>
- ? Agile PLM Solution Space: <http://www.oracle.com/goto/plmsolutionspace>
- ? Twitter: <http://twitter.com/agileplm>
- ? Facebook: <https://www.facebook.com/OracleAgilePLM>

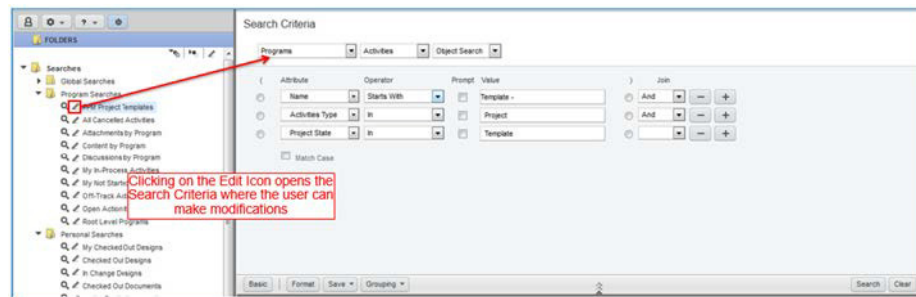
2 User Experience Enhancements

With the 9.3.6 release, we are focusing on customer enhancement requests coming directly from our customers. The ones around user experience are detailed below.

2.1 Add Edit Icon to Saved Searches

Prior to 9.3.6, a user has to run a saved search prior to editing it. Users would like to edit a search without having to run it first.

Release 9.3.6 includes an Edit icon. Click the Edit icon to bring up the search criteria where the user can make edits. The Edit icon applies to all saved searches.



2.2 Show Routed Date in Workflow Routing Tab

Prior to 9.3.6, there was no routed date on the Workflow Routing Tab. Users would like to sort by routed date.

Release 9.3.6 includes a Routed Date column on the Workflow Routing table

- ? For routable objects, the routed date is the date the object entered that workflow status. For example, when an ECO is routed for approval, the date it first enters CCB status is the routed date. If more approvers are added later, they will still see the original routed date. The routed date is stored with the workflow status for performance reasons. It would be a large performance hit to store and access the routed date for each workflow routing.
- ? For non-routable PCM objects (sourcing projects, RFQs), the date the owner is added to the sourcing project or RFQ is the routed date. If the owner is updated, the routed date is updated.

2.3 Additional Numeric Formats

Prior to 9.3.6, there were only 2 numeric formats and they exist only on the user preference:

- 987,654,321.09
- 987 654 321,09

In 9.3.6, there are 4 additional number formats:

- 987.654.321,09 (Period as thousands separator, Comma as decimal indicator)
- 987'654'321.09 (Apostrophe as thousands separator, Period as decimal indicator)
- 987654321.09 (No thousands separator, Period as decimal indicator)
- 987654321,09 (No thousands separator, Comma as decimal indicator)

Users can select one of the new formats as their preferred number format

- Upgrade will retain their selection prior to upgrade

All Numeric and Money attributes now have a Display format that default's to the User's Preferred Number Format

- This overrides the user's preferred number format

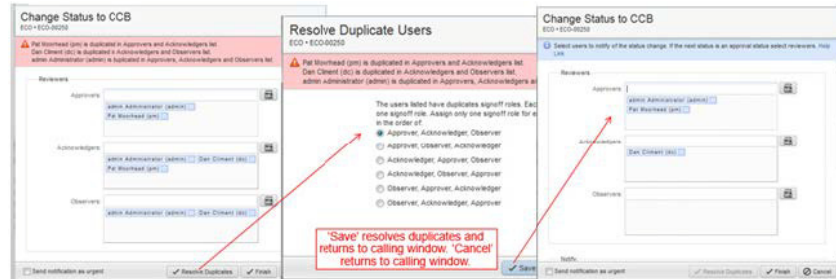
The system issues an error message if the numeric format entered does not match the valid format defined either on the numeric/money attribute or the user's preferred number format

2.4 Resolve Duplicate Order

Before Release 9.3.2, the user saw a popup when a user was assigned as both an observer and approver. Since 9.3.2, if there are duplicate signoff users, an error message is issued, but there is no easy way to remove unwanted signoff roles.

Release 9.3.6 provides a popup window that allows the user to select the hierarchy order in which signoff roles are kept.

- ⌘ The default hierarchy order of the available roles is Approver, Acknowledger, and Observer. Users with Approver and Acknowledger roles are required to sign off; users with the Observer has the option to sign off or not.
- ⌘ A user can change the default hierarchy.
- ⌘ When the user clicks 'Save', they return to the calling window with the duplicates removed.

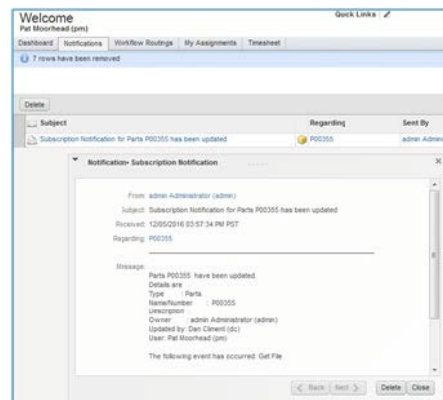


2.5 Enable Subscribe on File Actions

Release 9.3.6 allows a user to subscribe on all file actions except GetFile, OpenFile, and ViewFile.

In 9.3.6, a user can subscribe on GetFile, OpenFile, and ViewFile. This capability is supported as follows:

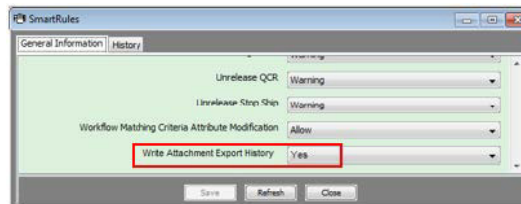
- ⌘ "Enable subscribe on file actions" is supported in Web Client, SDK, and Web Services.
- ⌘ This capability is supported for all business objects with attachments that support the Subscribe Action.
- ⌘ All Change orders support Affected Files and Affected Item Redline Attachment (Get File, View File). A precondition is to subscribe to each individual part that is named in a given Change.
- ⌘ All notifications use the existing Subscription Notification Template - no modifications are needed to send the File-specific notifications.



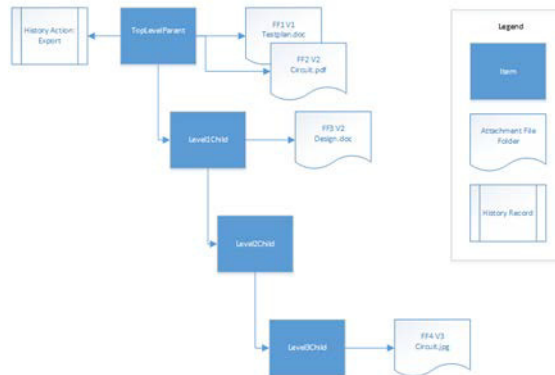
2.6 Write Attachment Export History SmartRule

Before Release 9.3.6, when a user exports an entire BOM and its attachments using PDX or aXML, export only writes a history record at the top level. There is no record of the export of the attachment itself.

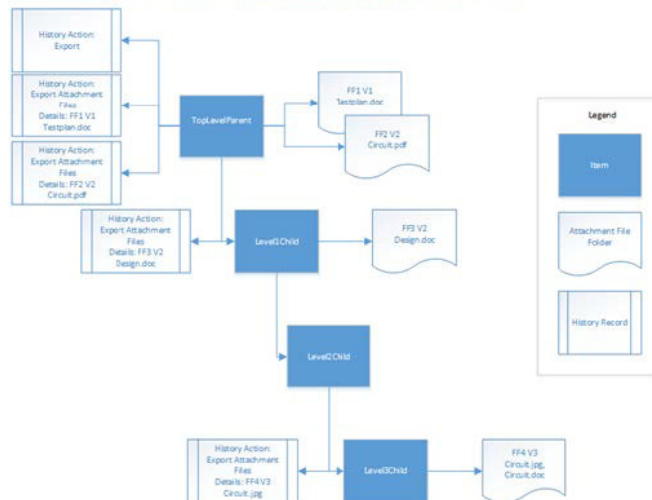
In Release 9.3.6, a SmartRule controls whether Attachment Export History is written, and whether it is written for every level of the BOM that has an attachment exported. The default is 'No' to keep the current behavior.



Smart Rule 'Write Attachment Export History' = No (Existing Behavior)



Smart Rule 'Write Attachment Export History' = Yes



The SmartRule also applies to ACS export of Transfer Orders.

For more details, see the Transfer of Information (TOI) recording for Agile 9.3.6 Functional Release Overview, which is accessed through My Oracle Support.

3 Administrator Experience Enhancements

The following are Administrator Experience enhancements:

3.1 Control Process Extension Visibility

Before Release 9.3.6, Actions Menu and Tools Menu Process Extension (PXs) were only available to users of the Home Organization. Users have visibility to PXs that they do not have privileges to run. Additionally, Supplier users were only able to access PGC PXs.

Release 9.3.6 offers User Role Required to See PX.

- The role defaults to My User Profile for users of the Home Organization
- The administrator can add specific role(s) to control who has visibility of PXs.
- If a user does not have the specified role, they cannot see the PX in the **Actions** or **Tools** menus.

3.2 Control List Display in Java Client

Prior to 9.3.6, the Web Client set the list Display Type to Search automatically if the number of results is greater than the system preference for Maximum List Values Displayed. In some cases, lists with a smaller number of values were converted from List to Search Display Type.

In 9.3.6, the list Display Type is controlled only in Java Client. The administrator can decide which lists should have a List or Search Display type.

3.3 HTML Configuration File for PX Cleansing

With the 9.3.4 release we added an HTML sanitizer that clears out HTML tags that are not in a predefined list. Customers have requested to allow additional HTML tags.

In 9.3.6, we added a properties file AllowedHTMLTags.properties that lists all of the allowed HTML tags. A customer can modify this file to include other allowed HTML tags.

For security reasons, we have another property file called ForbidHTMLTag.properties. Customers cannot allow any of these forbidden tags.

4 Product Collaboration Enhancements

The following Product Collaboration enhancements have been added:

4.1 New Rev as a Workflow Entry/Exit Required Field attribute

Before Release 9.3.6, the New Rev attribute could not be set as a workflow Entry/Exit Required Field. Customers requested being able to set the New Rev earlier in the release cycle.

In 9.3.6, the New Rev attribute can be set as an Entry/Exit Required Field for all workflow statuses. If the user does not enter the New Rev prior to the workflow setting, an audit message is displayed and clicking on it navigates the user to the Affected Items tab and highlights the New Rev cell.

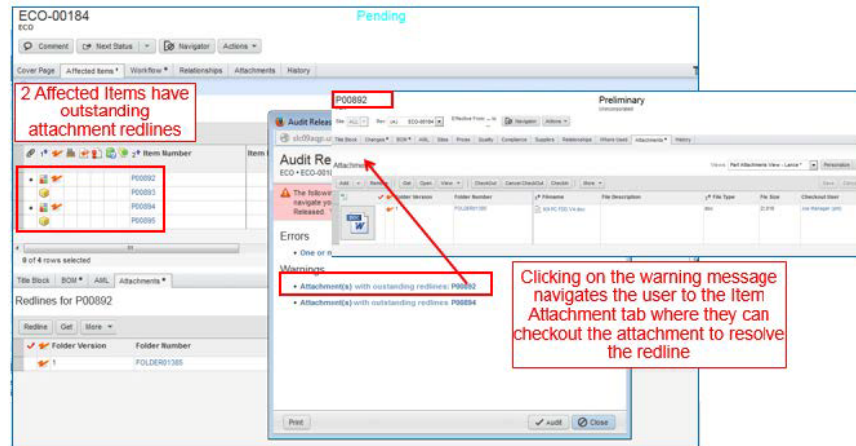
4.2 Release ECO with Unresolved Redlines SmartRule

Prior to 9.3.6, change orders can be released with unresolved redlines.

In 9.3.6, we have a new SmartRule Release Change Order with Affected Item Attachment Redlines.

- The default value is Warning.

- If the SmartRule is set to Warning or Disallow, the user gets either a warning or error message when they try to release a change order that has unresolved redlines.



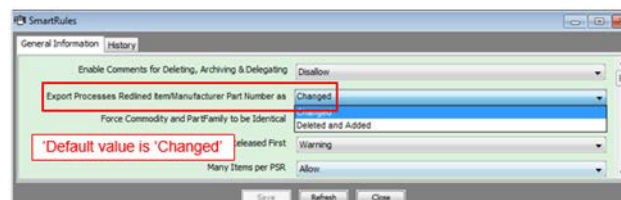
4.3 Export Part Redlines as Changed or Deleted and Added

Prior to 9.3.6, when a user replaces a part on the Affected Item BOM or AML, aXML records the action as Changed. This might cause confusion in a downstream system since 'change' implies that the BOM/AML attributes have been changed.



```
<Redlines>
  <RedlineBOMRow RedlineAction="Changed">
    <RedlineBOMRowCurrent>
      <ItemNumber>P00892</ItemNumber>
      <HasBeenRedlinedImage>false</HasBeenRedlinedImage>
      <ItemDescription>replacement part</ItemDescription>
      <ItemLifecyclePhase>Preliminary</ItemLifecyclePhase>
    </RedlineBOMRowCurrent>
    <RedlineBOMRowPrevious>
      <FindNum>10</FindNum>
      <AttachmentsImage>false</AttachmentsImage>
      <ItemNumber>P00892</ItemNumber>
      <ManufacturerImage>false</ManufacturerImage>
      <PendingChangesImage>true</PendingChangesImage>
      <HasBeenRedlinedImage>true</HasBeenRedlinedImage>
      <Par>false</Par>
      <PendingDeclarationsImage>false</PendingDeclarationsImage>
      <PriceImage>false</PriceImage>
      <Qty>1</Qty>
      <ItemUoM1>EA</ItemUoM1>
      <ItemRev>A</ItemRev>
      <ItemLifecyclePhase>Production</ItemLifecyclePhase>
      <ReferenceDesignators>
        <ItemUoM5>No</ItemUoM5>
      </ReferenceDesignators>
      <ItemP2Multilist1>
        <Value>INTERNAL</Value>
      </ItemP2Multilist1>
    </RedlineBOMRowPrevious>
  </RedlineBOMRow>
</Redlines>
```

In 9.3.6, we added a new SmartRule 'Export Processes Redline Item/Manufacturer Part Number as'. The default is 'Changed' since that is the current behavior. If you want this recorded as a delete of the original part and an add of a new part, you can select 'Deleted and Added'



```

- <RedlinedBOMRow RedlineAction="Deleted">
  - <RedlinedBOMRowPrevious>
    <AttachmentsImage>false</AttachmentsImage>
    <ManufacturerImage>false</ManufacturerImage>
    <PendingChangesImage>false</PendingChangesImage>
    <HasBeenRedlinedImage>true</HasBeenRedlinedImage>
    <Psr>false</Psr>
    <PricingImage>false</PricingImage>
    <PendingDeclarationsImage>false</PendingDeclarationsImage>
    <ItemNumber>6598-01</ItemNumber>
    <ItemDescription>DC Power Cable</ItemDescription>
    <ItemRev>A</ItemRev>
    <Qty>3</Qty>
    <FindNum>5</FindNum>
    <ReferenceDesignators/>
  </RedlinedBOMRowPrevious>
</RedlinedBOMRow>
- <RedlinedBOMRow RedlineAction="Added">
  - <RedlinedBOMRowCurrent>
    <AttachmentsImage>false</AttachmentsImage>
    <ManufacturerImage>false</ManufacturerImage>
    <PendingChangesImage>false</PendingChangesImage>
    <HasBeenRedlinedImage>true</HasBeenRedlinedImage>
    <Psr>false</Psr>
    <PricingImage>false</PricingImage>
    <PendingDeclarationsImage>false</PendingDeclarationsImage>
    <ItemNumber>P00004</ItemNumber>
    <Qty>1</Qty>
    <FindNum>0</FindNum>
    <ReferenceDesignators/>
  </RedlinedBOMRowCurrent>
</RedlinedBOMRow>

```

5 Product Portfolio Management Enhancements

The following sections describe Product Portfolio Management enhancements.

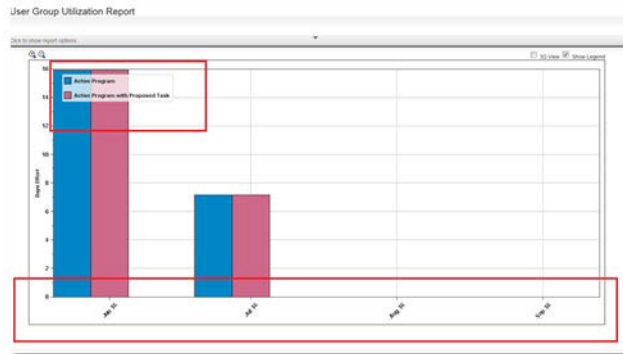
5.1 Release Utilization Report Enhancement

In 9.3.6, we made several enhancements to resource utilization related reports including:

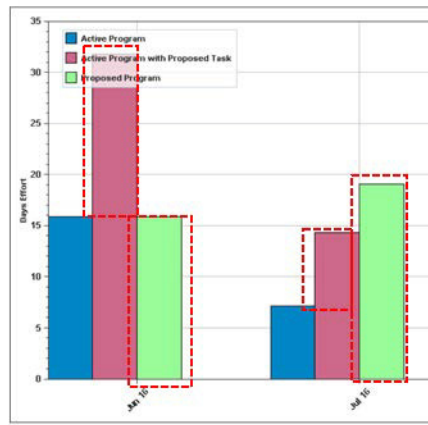
- Change the default Start Date and End Date logic for non-object launch: Start Date will be current date and End Date will be 3 months after Start Date
- Retain report parameters including Display Type and Include Proposed Project Allocation

- Change the default Start Date and End Date logic for object launch: Start Date/End Date will be retrieved from the current assignment/task

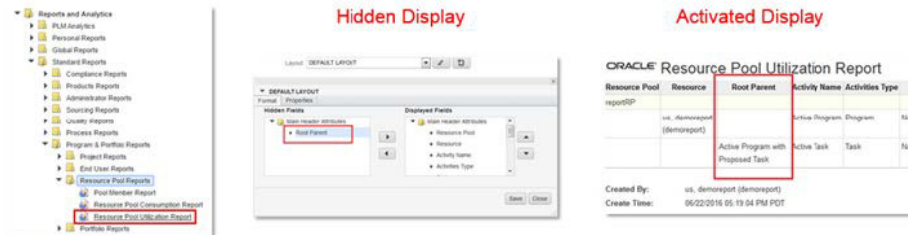
- Change the legend position of the content



7 Change logic of Include Proposed Projects Allocation checkbox



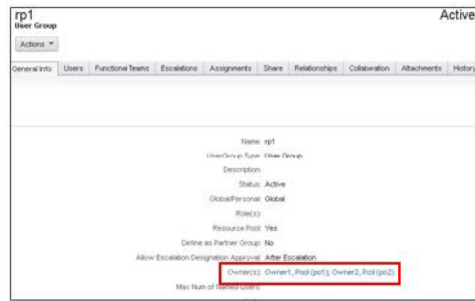
7 Add a new attribute to Resource Pool Utilization Report of Standard Reports



5.2 Enable Multiple Resource Pool Owners

In 9.3.6, we change the Resource Pool Owner from List to MultiList to adopt multiple-owner use cases. Each owner in the list can manage resource pool exactly the same as the original owner.

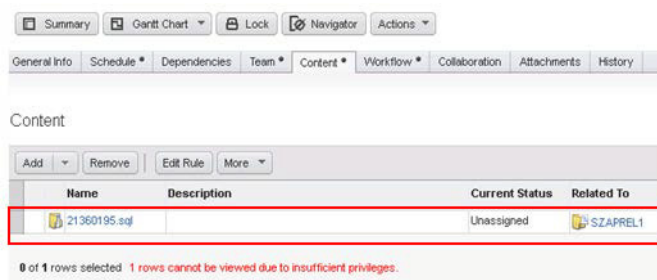
Pool Owner attribute on Team tab of Activity or Gate is also changed accordingly.



Pool Owner attribute on Team tab of Activity or Gate is also changed accordingly.

5.3 Align Discover Privileges on Content Tab to Mirror Attachment Tabs

In 9.3.6, we change the privilege check on Content tab for File Folder object to allow a team member to view the attachment in Content tab without File Folder discovery privilege, which is aligned with Attachment tab behavior.



5.4 Add Preference Settings on Project Summary Page Activities

In 9.3.6, we improve the Project Summary page behavior to retain 4 parameters as below:

Upcoming Activities and Action Items

Add
Show: All
due in: 7 days

Name	Owner	Due Date
SZAPREL1_C2_C1 Not Started - 0	Administrator (admin)	05/05/2016 05:00:00 PM

Recent Discussions

Add Join
Show: All
updated in last: 7 days

Subject	Most Recent Message	Date
szdisc1	Administrator (admin)	03:30:42 AM

Select a discussion above to view the discussion thread.

In 9.3.6, the Show drop-down list value and value input of Due in Days can retain in Local Storage

5.5 Disallow Status Changes on a Locked Activity

In 9.3.6, we fix a bug that the status of a locked activity can be changed through changing the status of its child activity by another user.

6 Platform Changes

The following sections describe Platform Changes.

6.1 Software Support

Application Server

- 7 Oracle FMW Infrastructure (Weblogic) 12cR2 12.2.1.1 on 64-bit JDK 7
- 7 Note: Only 64-bit JDK 8u20+ certified
- 7 Note: WebLogic Suite, WebLogic Server Enterprise Edition, WebLogic Server Standard Edition certified.

Database

- 7 Only Database 12cR1 (12.1.0.1+)
- 7 Note: Enterprise Edition, Standard Edition, Standard Edition One, Standard Edition Two certified

Web Browser

- 7 Firefox (ESR 45 and 38) on Windows/Linux
- 7 Safari 10, 9 and 8 on Mac OS
- 7 Microsoft Edge and Internet Explorer 11 Windows
- 7 Note that the RMW modules are only supported on IE
- 7 Chrome 55 and 46 on Windows

Server Operating Systems

- 7 Oracle Solaris 11.2+
- 7 Oracle Linux 7 and 6 (64-bit)
- 7 Red Hat Enterprise Linux 7 and 6 (64-bit)
- 7 Microsoft Windows Server 2012 R2 and 2012

- ? IBM AIX 7.2 and 7.1 (POWER 64-bit)
- ? SUSE Linux 12 (64-bit)
- ? Add HP-UX 11.31 (Itanium64)
- ? Also certified on Exadata (database) and Exalogic V2 (app server)

AutoVue for Agile:

- ? Oracle AutoVue for Agile PLM 21.0.1

Server Virtualization

- ? Oracle VM 3 with Oracle Linux, Solaris, and Windows Server
- ? Oracle Solaris Containers/Zones
- ? IBM AIX LPARs
- ? Microsoft HyperV (see Support Note 1563794.1)

Note: Review the Oracle Agile PLM 9.3.6 Capacity Planning Guide for the official, detailed platform certification matrix. Any errors in the list above do not override the official intended software support.

7 AutoVue for Agile 21.0.1 and Agile 21.0.0 Enhancements (Releases with Agile 9.3.6)

The following sections describe AutoVue for Agile 21.0.1 and 21.0.0 enhancements for 9.3.6.

7.1 Java Applet Remediation

From Release 21.0.1 AutoVue Client is a Java application that can be started through Java Web Start framework. This framework requires a JNLP file to start the application. The AutoVue client as applet is being deprecated in 21.0.1. AutoVue client is now launched using the Web Start technology.

Note: There is currently a known issue with Microsoft Edge that makes performance unreliable and it is not recommended at this time.

7.2 New Format Support

From AutoVue 21.0.1, the following formats are supported:

- ? CatiaV5-6R2015
- ? SolidEdge ST8
- ? Inventor 2016
- ? AutoCAD 2016 and 2017
- ? SolidWorks 2016
- ? Adobe Acrobat DC 2015

7.3 View Files in Separate Viewer Windows Setting

From AutoVue 21.0.0, when you view files, this setting determines whether a new AutoVue Viewer window is created for each file that you view (enabled) or whether one Viewer window is reused to view different files (disabled, the default). To toggle this setting, select this menu item in the drop-down menu. The setting is enabled when a check mark is displayed next to this menu item. NOTE: When View files in separate Viewer windows is enabled for a user, then files viewed in Java Client are also displayed in separate Viewer windows.

7.4 21.0.0 Support of Mobile 3D Streaming Files

AutoVue 21.0.0 includes support of 3D Streaming Files in the Mobile Client.

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