

Agile PLM 9.3

Interviews with the Solutions Delivery team

Version History

Version 01	January 8	This version contains notes from interviews with Mike Leiberman, Shane Goodwin and Matt Nevins of the Solution Delivery team.
Version 02	January 11	Shane provided us with a demo of the 8.5 Windows client, 9.2 Java client and web client. Notes from this demo are included.

Document Description

This document contains a summary of some of the primary challenges users of the Agile system are experiencing from the perspective of members of the Solutions Delivery team.

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Related Documents

None at this time.

Mike Leiberman *Solutions Delivery*

Based in Chicago, Mike is part of the Solutions Delivery team. His two primary customers have been Qualcomm and Micron.

Background on Qualcomm

Mike has been working with the Qualcomm in San Diego since 2004. As of March of 2005 he's been interfacing with them once per week. The only product Qualcomm is currently using is PC. They have a small group of 5 people who are beginning to experiment with PG&C.

Since Mike has transitioned to a new role, in which he supports six customers remotely via phone and WebEx, Dave Parisons has taken over as account owner for Qualcomm.

Challenges

QualComm upgraded from Agile 7.0 to 9.0 about a year ago. They are using the Agile Java client, web client and web portal. Several of the core issues that users at Qualcomm are experiencing have resulted because these client applications tend to share some but not all of the same functionality and features, and the manner in which users interact with each application differs.

In Mike's words, "We have these different client applications and they all have different interfaces and approaches to interacting with the server. Features are implemented in one and not the other. Bugs are fixed in one client and not the others. They are unique solutions rather than being brothers and sisters."

Bulk changes

For example, applying a bulk change is supported in the Java client while in the web client users must drill down to each of the individual objects in a group to make the same change. Drag and drop to populate a table or tab is not supported in all clients. If users cannot either efficiently complete or complete a task at all in one client, they'll often switch to another. This has resulted in a loss of efficiency.

Mouse clicks

Mike expressed that the from 7.0 to 9.0 the number of clicks required to complete a task has increased, greatly increasing the amount of time it takes to complete a task. In fact, Qualcomm brought in an ergonomics consultant because its employees were starting to develop carpal tunnel syndrome.

Mike feels that the Windows client suited its customers well while the Java client suited a technology need. Although the Java client "looked" the same to users at Qualcomm, it did not feel the same to them as the Windows client.

Bug fixes

One of the unfortunate consequences of attempting to maintain several client applications is that bug fixes become out of synch. A bug may be fixed in one client and not the other resulting in users being unable to complete a task in the same application.

Web portal

QualComm implemented the web portal in an effort to simplify the user interaction with Agile and modify its look and feel. Although all of the information is presented on "one page" in the portal, users do not feel this presentation helps them to more efficiently complete their tasks, especially complex tasks such as creating a BOM or AML.

(approved manufacturer list) in which multiple objects are linked together. Users tend to move back to the Java client to complete these complex tasks.

Users

There are two types of users who interact with Agile at QualComm: power users and non-power users.

Non-power users represent about 90% of the user base, and may interact with Agile only 10 minutes per day. These users interact with Agile in more of a "reactive" mode, in the sense that they come in to Agile when they receive an email notification to review and sign off on a change for example. They may also use Agile to look up information, do minor BOM red-lining or to import information from an engineering or mechanical CAD tool. Engineers at QualComm tend to be the non-power users.

Power users at QualComm tend to be those who supplement engineering, such as change analysts and engineering services. They work off of the inbox in Agile and the recently visited list. They import data from other applications and receive input from several different sources to include in Agile, ranging from information in an email to verbal information from a co-worker who has come over to their desk.

PG&C

Mike sees 2 main problems that have prevented adoption of PG&C. First, PG&C is not supported in the Java client or the web portal - it's only available in the web client. This led users at QualComm to question, "Why aren't all of the products supported on the same client base?"

Second, the user interface does not support the process buyers and purchasers typically go through for governance and compliance. When they come into the system, they are required to look at the data in a different way and have expressed that they "don't know what we're looking at." Mike explained that buyers and purchasers are used to communicating via fax and Excel, "the people are not tech savvy but the product is."

Background on Micron

Micron is doing a brand new implementation of Agile, primarily of PPM 9.1. Although there are 1000-1500 potential users of PPM at Micron, only 1-2% are actually using the product. Mike has been working with them two days per week since Sept. The project has been going on for 15 months.

Challenges

Integration with Microsoft Project

The biggest pain point is how PPM interfaces with Microsoft Project. The issues here tend to be functionality rather than user interface focused.

PPM's Gantt chart

The second issue is with PPM's Gantt chart, implemented as a Java applet in the web client. Users find it "cumbersome, clunky and slow," and are limited to doing one task at a time. For example, if they need to delete an item that appears in multiple levels of a schedule, they must manually delete it from each level, "the same task in 5 clicks." It's slow to launch and they don't want to have to wait to view where they are at in a project. In addition, it's very

object focused and they can't relate it back to the process.

To surmount these obstacles, users at Micron have come up with a couple of workarounds. To get around the Gantt chart, they'll typically export to MS Project, make any changes, then re-import to PPM. If they need to delete an item that appears in multiple levels of a schedule, they may go into the web client to accomplish this task.

Shane Goodwin

Solutions Delivery

Shane Goodwin is currently transitioning to Product Management from the Solutions Delivery team. Prior to joining Agile, he was an Agile customer back in 1999. He shared his insights into some of the challenges encountered by customers he helped transitioned from the 8.5 client to 9.0. To Shane, Agile needs to focus on productivity tools for its users.

Challenges

Multiple windows

Since much of the information between BOMs and ECOs (engineering change orders) can be shared, having multiple windows available where users can copy and paste or drag and drop information between BOMs makes their work more efficient. Without multiple windows, authoring content becomes difficult because users aren't able to reuse data. In addition, having multiple windows allows them to keep the results of several search results open at the same time.

Hiding fields

Through the admin tool, an admin can restrict users' access to different types of information, for example to pricing information. However, in Agile the field appears to the user with the value of "No Privilege." In fact, No Privilege can appear multiple times for a given item.

Sorting

Sorting information, for example data in a table, is not fully supported across the client. Shane showed us a screen where sorting was supported in one table but not supported on another table on the same screen.

Scrolling

When viewing a large dataset in a table, the user interface forces the user to scroll horizontally. This creates difficulty in tracking a row across the table since the user loses their frame of reference.

Icons

In some cases, there are inconsistencies between the icons used to represent the same information between the web and Java client. This poses a challenge when users perform a task in the Java client that launches the web client, which is the case when users are doing reports.

Tasks and notifications

In PC, an email notification is triggered in tasks such as when a user needs to review and sign off on a change request. With the introduction of PPM, users are "double-bombarded" with notifications which have to do with the project schedule. Shane feels that users need a single view of what they need to be working on within Agile.

On-line help

Agile does not support context sensitive help; if a user needs assistance on a particular screen in Agile, they are not taken to the specific section in the Help PDF that would address their problem. Shane recommends that the on-line help system support users' ability to author their own help content as well.

Matt Nevins

Solutions Delivery

Ben and I sat met with Matt Nevins, who is a Solutions Delivery consultant at Agile for the Western Region. He is responsible for going in to companies and getting them up and running on the product. One of Matt's largest customers is Viasat in San Diego.

Background on Viasat

Viasat is currently on Agile 8.5 and will be upgrading to 9.2. A select group at Viasat (55 people) have been beta-testing the 9.2 client for the past 3 months.

Challenges

Matt communicated the primary issues they've identified with moving from 8.5 to 9.2.

Multiple windows

The lack of multiple windows for the web client makes tasks like comparing schematics much more difficult.

Table editing

There is no support for in table editing in 9.2. Unlike Agile 8.5, in which tables behave as they do in Excel, in 9.2 traditional table editing is not supported.

Performance issues

There are performance issues with the Java client. Essentially it's too slow and requires too many clicks to get a task done. To Viasat, every extra click is perceived as a loss of a dollar.

Report presentation

The presentation of reports is lacking in 9.2. Although 9.2 allows for more reports, they "don't look as good".

File management

The model for file management changed from 8.5 to 9.2, and hasn't been received well. They told Matt that if they had know that this was the way they were going to be managing files, they wouldn't have upgraded.