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How Products Become Profits™

Pre-Sales Feedback

18-Apr-07

▶ Warren Basch

▶▶ I've been working with build 36 for 4 weeks now. Did a very complex 12 hour demo at On Semiconductor with lots of interaction and 3 major PXs that worked fine, not one problem. Lots of complex BOM structures with sites, a very complex project workflow with over 100 dependencies. I had to do lots of corner cases like a multi branch site driven BOM with custom cost rollups along each branch using the site dimension on the cost rollup report. I put in a catalog with over 100 categories of search folders, not problems. I also used esoteric stuff like direct object linkage through list fields, and full BOM template coping with reuse within the branches to show a template approach to IC process BOM creation.

▶▶ Overall we destroyed MOne in their own house, Agile is going to the CFO on Thursday for a large deal. The customer said people were falling asleep in the Mone demos.

▶ Ken Poe

▶▶ this is the best version of Agile ever. I would now finally call us an enterprise application

▶ Bob Hawkins

▶▶ It is working well. I have been started with earlier builds and now am using the GA release with no major issues. Stability is great and problems I have seen are not repeatable and may be related to hardware. PPM is great especially the summary page and the charts. Relationships enables flexibility we have never had before. I expect this to be a gold release that we have never seen on the 9 platform.

But We still have Whole Product Issues…

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- Analytics
  - Demos don't work on SC machines
  - Hosted system is too slow
  - PPM reports / use cases weak
- PG&C
  - Not enough data in demo databases for good demos
  - Declarations hard to demo (excel)
- PCM
  - Still hard to demo (might be training)
- CAD & Viewer
  - Hard to impossible to demo
- Lots of minor things that could be fixed in SPs
  - Search and results stuff

▶ While the issues are real the solutions they offer may not be
  ▶▶ But... solving their problems is key to enabling our channel to sell more software
  ▶▶ The little things need to be top priorities
  ▶▶ Create your own SRs to track and fix these in 9.2.2 if it makes sense

▶ The big things are issues we need to fix medium to long term
  ▶▶ UI form layout
  ▶▶ BOM views

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Warren B's feedback

1. Put search attributes used in the results display automatically, don't force the user to replicate manually.

2. Put an Excel export button on the search results, Tools->Export -> table format is not intuitive for any user

3. In the relationships view panel, folder objects should be editable if the checkout button is used.

4. Fix the viewer markup collaboration use model, really sucks right now, Need a session invite notification that launches the participants into a collaborative session with one click from the notification message. Almost impossible to use right now.
   ▶▶ User 1 starts viewer from a click on a redline icon in Agile
   ▶▶ User 1 selects the collaboration/start session option (won't work if the user hits the redline toolbar icon in the viewer)
   ▶▶ User 2 searches for the item in Agile
   ▶▶ User 2 selects the folder link on the attachment to the part/doc object
   ▶▶ User 2 selects the redline icon next to the file
   ▶▶ User 2 selects collaboration/join session in the viewer
   ▶▶ If any of this is not done exactly you are lost in viewer hell.

5. Fix analytics!!! The environment is very fragile for demos, the bandwidth required for any kind of responsiveness requires installs on SC laptops, my installation has been broken for 2 weeks now, Teddy and Pat are stumped.

6. Fix the analytics PPM demo, extremely week, one tab for portfolio evaluation, 5 tabs for financials that are very weak. We need a full set of reports to do more "what do we build" and "what products do we kill" decisions. This is HUGE in all of my customers.

7. Build a role in each release that contains all of the privileges needed to leverage new functionality. Right now we have to figure this out and it is PAINFUL. At least with a new functionality reference roll we can lookup privileges or just add the role to our logins for demos.

8. Enable demo servers that have several CAD tools on them with our CAD integrations. Let us use Remote Access to do the demos on these boxes. I'm sure I could do a basic CAD integration demo, but don't want to deal with over bloated virtual PC environments or the maintenance of this configuration. If remote access is too slow, then we need to evaluate Gotomypc as a solution for some demo boxes, see gotomypc.com which uses citrix technology and is faster than webex and can be externally initiated. Sometimes this traffic is blocked at customers, so an alternate solution should be researched. This solution is needed as we won't be able to license CAD tools for all the SC boxes even with virtual PC.

9. Need a cost integration from PCM to PC. By this I mean that if we define a standard cost field on page 2 of parts that can be accessed with the basic BOM cost rollup report in PC, then we need a way to get the data from PCM cost objects to that field. Currently PCM requires user access to the costing project and then must do the rollup, this access is not an option for engineers.

10. NEED forms control for our objects. A single column of fields is prehistoric. Even 8.5 supported basic form layout. It is time to at least offer 2/3 column views that keep attributes together under heading attributes.

11. Need BOM views. By this I suggest that we have a superset of BOM attributes defined as now for the parts and document classes, but allow a view to be defined for each subclass that hides some attributes. This way I can have a part subclass called PCB assembly that shows its children components with RefDes, Qty etc. and an IC assembly that hides these fields, and a document BOM for requirements objects with priority/commit/customer columns, but another document BOM would not have these. This is VERY powerful and relatively easy as I am not proposing a data model change.

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12. Enable Search Folder discovery security. Users want to be able to hide some search folders within Global from some user groups.

13. Enable qualified searches on parametric attributes. When a user hits search, the results are cached on the app server, it should be easy to only show the list values on the parametric search form that are contained in the initial result set. Enable the search to automatically search when a search parameter is set, that way results are provided automatically and the next search attribute list values will be reflective of the new result set.

14. Fix the &*^&%% horizontal and vertical scrollbars, screen real estate management is NOT good. This also applies especially to dashboard views.

15. Column management in the BOM view is very inconsistent, and does not stick to my resize attempts. Basically we really need smart column sizing on views.

16. Search result column headers in parametric or advanced searches are prehistoric. Need a nice multi row column header with the attribute broken into one element on each row. Right now the columns can't be read as there is no wrapping and the attributes can be quite long with the name inheritance nomenclature.

17. Use the single column concatenation approach to showing quality/change/price/attachment icons, conserve horizontal real estate.

18. Combine the parametric and advanced search use models into one search. Conversion to advanced search is a band aid.

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19. Create an Excel integration to PPM with web services, at least for demo purposes. Our lack of forms makes it impossible to put meaningful financial forecast data into a PPM project. A web services example would show users that they really can do New Product Idea mini projects. The integration will put key financial data into PPM for rollup to PPM Analytics.

20. PCM needs some basic cost analysis capabilities and cost processing, not necessarily Analytics. I.E. a blended standard cost calculator based on AML item costs with split percentage weighting. Or, commodity cost trend by supplier or averaged by supplier base for a single part or part family.

21. Need a date view for a BOM. We configure the BOMs based on parent child date dependencies, so why can't we view against any arbitrary date for the full BOM structure? We freeze the BOM on export and rev to ERP, but the current BOM view we provide is always a moving target. This is hell for R&D views of a BOM, especially IC IP BOMs or software BOMs where a configuration must be frozen. A date view could be used for export or we could even provide a date based baseline view that is saved. I am not suggesting that we change our data model for BOMs as our view is technically dynamic, but it would be nice to add the one date view control layer on this.

22. Firefox (2.0) and our viewer don't play nice together, if you open the viewer, the main Firefox window is shrunk to almost icon size requiring the user to manually resize every time.

23. Time to work on our workflow, at least incrementally. Enable multiple approver's lines that would display as parallel workflow state boxes. Then allow voting logic on this parallel set of approver groups such that the pseudo parallel state can be approved if one or a majority of the approver groups approve. This at least shows a parallel graphic and takes us somewhere from etch-a-sketch workflow closer to PTC's abilities.

24. Enable phase duplication in PPM to allow a quick "re-spin" section in a project. Re-spins happen all the time in IC and PCBs, but we don't provide a good solution as PPM is task based, and our workflow can't spell "Activity".

25. Enable thumbnails in the file attachment view, can't our viewer provide this with a bit of API work?

26. Enhance one of our demo systems with the Autonomy search engine. This integration is powerful.

27. Allow us to hide fields on Page One of objects, just because they are hidden our business logic should not break. If a field is "required" then don't allow it to be hidden.

▸ In pcm I brought it to its knees with a 100 line rfq

▸ Did also struggle with 1752-2 homogeneous declarations.

***** 0 stars (totally broken - can't show during a demo) *****

▶ 1. Full text search -- Impossible to get working. Once working, results as displayed are useless

These are in 0 stars because I can't get them installed or use a system where they are installed:

▶ 2. Any CAD integration

▶ 3. Analytics ETL

▶ 4. PI

▶ 5. Prodika - (This is my fault - haven't really tried) 6. Portals/Analytics Web Interface - (Motivation is low to tackle anything that needs WebSphere)

▶ ******* 1 star (functional, but would never show in a demo) *******

▶ 1. Advanced Productivity file upload tool -- Hangs the browser

▶ 2. Import tool -- Horrible tool. Need this more for demo setup.

▶ 3. Viewer markup

▶ 4. Cascading lists -- Avoid because they illustrate our lack of validation of field entries.

▶ 5. Boolean Advanced search

▶

***** 2 star (functional, will show in a demo if needed) *****

▶ 1. Viewer -- The viewer is much better but still not usable.

▶ 2. PG&C Substance rollup -- The excel integration is fragile. And the PXes do not seem to be set up properly in any demo db that I have used.

▶ 3. Java Client only for admin tasks in a demo. -- In my environment, the login won't "take" until the 5-10th try. I keep getting the error "Server unavailable". After repeated attempts, I can usually get logged in

▶ 4. Alternative browsers can be problematic - FF2.0

***** 3 Star ***** (Normal operation)

▸ 1. Performance is good

▸ 2, U/I is functional but not stellar. Still too many clicks and poor use of screen real estate. Infinite horizontal scrolling is weak. This is a problem because we show demos on in-focus projectors that limit our screen resolution. The best we can get is 1280x1024.

▸ 3. Change Management functions well.

▸ 4. Document management performs very well (except for advanced file upload tool) 5. Custom reporting is good.

▸ 6. PXes are also very good.

▸ ******* 4 Star ***** (Killer new functionality)**

▸ 1. Dashboards are good

▸ 2. Analytics are very well received.

▸ 3. Query by form search

▸ Notes:

▸   In general, the quality of the main modules (PC, PQM) is very good but as you get away from the core, the quality falls off. Having done 2 PCM demos recently, I am not thrilled with the quality of that module.

▸ The challenges I have are with PCM and PGC.

▸ Declarations are challenging and there is very little "real" data to show good reports and use cases. Hopefully I will have some time soon to start building in more data.

▸ Udpating old databases has been a big problem, as pre GA dmps did not upgrade well to GA (I understand the reason why) so demos and data had to be rebuilt a couple times. Also, upgrading from 8.5 is not trivial. This is very important in sales cycles for older customers to showcase 922 and additional modules.

▸ Analytics needs some help and is very disappointing after a good start. Data is weak, PPM reports are very limited, and flexibility to create new reports with custom data is a science project. Access to hosted system is not ideal and limited.

Shane Moorhead

▸ From the time I have spent with 9.2.2 it looks real good.

▸ relationships tab is powerful for extending what we can do with many use cases,

▸ PPM looks really good too.

▸ I have done only 1 major demo with it (Bayer Global PLM back in March)…and have done a bunch of high level upgrade demos.

▸ Aside from that I haven't had a lot of time to really push all the buttons and turn the knobs to really take it through its capabilities particularly around PCM and PGC. I am hoping in May I will have a few days in the office to start building my own demo from scratch - this is a good way to review all the new features and test out things like Import.